



CareWhen Enhancements

Release Notes: Version CW 3.3.3.12 July 29, 2021



General Performance Enhancements

- We have enhanced the applications performance in the following areas
 - Client and Caregiver demographics
 - Schedule
 - Order entry
 - Visit Approval

Alert schedulers to visits needing follow-up tasks

HOW TO USE:

1. A "Needs Follow-up" checkbox has been added to the visit editor.
2. When marked, the background color of the visit changes to a lilac color making it easily identifiable.
3. The new color is visible both on the weekly and monthly schedule views.

Edit Visit for [Andrews, Abigail "Abby"] start on [Thu 7/8/2021 11:00 AM] code [36010]

Visit Details | Visit History | Client Orders | Captured Documents

Client: Andrews, Abigail "Abby" Subscriber: PVT/None

Visit Start: 07/08/2021 Duration: 02:00 Start Time: 11:00 AM End Time: 01:00 PM Reduce Minutes: 30 Reduce Duration: 01:30

Charge Code: 36010 : Homemaker Hourly Client Zone: Kellogg [Show Codes](#)

Subscriber*: 1 - Private Pay, Abigail Andrews

Assign Employee: Doe, Jane [LPN] [Turned Down](#)

Visit Status: Ok Needs Follow-up

Comment: Type a short comment...

[Save & Close](#) [Cancel](#)

CareWhen? [INTEGRATION] AssuriCare

Home | Scheduler | Clients | Employees | Referral Sources | Reports | Tasks | Messages | Settings | Help

Schedule for [All Clients] [All Employees] July 5 - 11, 2021

Employee Hours: 43:00 Billable Hours: 46:30	Monday 7/5 08:00 07:30	Tuesday 7/6 09:00 08:30	Wednesday 7/7 08:00 07:30	Thursday 7/8 09:00 08:30	Friday 7/9 08:00 07:30	Saturday 7/10 02:00	Sunday 7/11 05:00 05:00
	HMK 8:00a (02:00) Smith	HMK 8:00a (02:00) Sm	HMK 8:00a (02:00) Sm	HMK 8:00a (02:00) Sm	HMK 8:00a (02:00) Sm	HMK 8:00a (02:00) Sm	HMK 8:00a (02:00) Sm
Doe, Jane [LPN]	8:00a (01:00) Jordan, Mich...	8:00a (01:00) Jordan, ...	8:00a (01:00) Jordan, ...	8:00a (01:00) Jordan, ...	8:00a (01:00) Jordan, ...		
09:00 AM (5)							
Doe, Jane [LPN]	9:00a (01:00) Jordan, Mich...	9:00a (01:00) Jordan, ...	9:00a (01:00) Jordan, ...	9:00a (01:00) Jordan, ...	9:00a (01:00) Jordan, ...		
10:00 AM (3)							
Stallone, Sylvester "Rocky" [RN]	10:00a (02:00) Creed, Apollo		10:00a (02:00) Creed, ...		10:00a (02:00) Creed, ...		
11:00 AM (8)							
Doe, Jane [LPN]	11:00a (02:00) Andrews, A...	11:00a (02:00) Andrews...	11:00a (02:00) Andrews...	11:00a (02:00) Andrews...	11:00a (02:00) Andrews...		
Stallone, Sylvester "Rocky" [RN]		11:00a (03:00) Creed, ...		11:00a (03:00) Creed, ...			11:00a (03:00) Creed, ...
12:00 PM							

Track When Caregivers Turn Down Visits

HOW TO USE:

1. The ability to track caregiver turn downs has been added to the visit editor.
2. With a caregiver in the Assign Employee field, you can click on the Turned Down button in the visit editor.
3. This entry will be retained in the Visit history and will also appear on the Reliability Report.

Edit Visit for [Smith, Sharon] start on [Wed 7/14/2021 8:00 AM] code [36011]

Visit Details | Visit History | Client Orders | Captured Documents

Client: **Smith, Sharon** Subscriber: IDM/MED

Visit Start: 07/14/2021 Duration: 02:00 Start Time: 08:00 AM End Time: 10:00 AM

Charge Code: 36011 : Personal Care Hou... Client Zone: Hayden [Show Codes](#)

Subscriber:* 5 - ID Medicaid, MED - Medicaid, Sharon Smith

Assign Employee: **Smith, Samuel (HMK)*** [Find Available](#) **Turned Down**

Visit Status: **Ok** Needs Follow-up

Comment: Type a short comment...

[Save & Close](#) [Cancel](#)

07/09/21 10:36 AM CHS Test Services Page 1

Employee Reliability Report from 07/01/2021 to 07/17/2021

Criteria: Note Type = All, Zones = All

Smith, Samuel HMK [4.H.K]

Unavailability:

Status	Start Date	End Date	Start Time	End Time	Recurrence	Comment
Not Available	07/14/2021	07/14/2021	08:00 AM	05:00 PM		

Status	Date	Client	Scheduled	Completed	Comment
Turned Down	07/02/2021	Smith, Sharon M	08:00 AM-10:00 AM (02:00)		
Turned Down	07/14/2021	Smith, Sharon M	08:00 AM-10:00 AM (02:00)		

Cancelled	Date	Client	Scheduled	Comment
By Employee	07/01/2021	Smith, Sharon M	08:00 AM-10:00 AM (02:00)	Family emergency

Cancelled: 1 Visits for 02:00. Average Cancelled Visits: 02:00
 Late: 0 Visits for 00:00. Average Lateness: 0
Turned Down: 2 Visits for 04:00. Average Turned Down: 02:00
 Completed: 0 Visits for 00:00.
 Visits completed by Clockwork: 0.
 Visits completed by Mobile App: 0.

Text Messages Sent: 0
 Text Messages Received: 0

Connect Case Managers and Clients

HOW TO USE:

1. A new Case Manager section has been added to settings under Users & Roles.
2. Case managers can be added by name, and additionally you can reference the company they work for if desired.
3. The Case Manager can then be added to a client record from a drop-down list on the scheduling tab.

The screenshot shows the CareWhen? [INTEGRATION] interface. The top navigation bar includes Home, Scheduler, Clients, Employees, Referral Sources, Reports, Tasks, Messages, Settings, and Help. The left sidebar contains a tree view of settings categories: Skill type, Text Messaging, Agency Logo, Maintenance, Agency Tables, Charge Codes, Payment Codes, Adjustment Codes, Education Codes, Diagnosis Codes, Note Types, Type Of Service, Discharge Reasons, Document Categories, GL Codes, Users & Roles, Agency Roles, Agency Users, Doctors, and Case Manager (highlighted with a red box). The main content area displays the 'Case Manager' section with a search bar and a table listing Case Managers. The table has columns for Last Name and First Name, with one entry: Jones, Sally. An 'Edit Case Manager Record [Sally Jones]' modal window is open, showing the 'Personal Info' tab. The form includes fields for First Name (Sally), Middle (M), Last (Jones), Suffix, Company, Address (307 Prairie Ave), Address 2, City (Hayden), State/Pr (Idaho), Postal Code (83835), and Email (sallyjones@somedomain.com). There is an 'Active' checkbox checked. Below the form is a 'Phones' section with a table for adding phone numbers and a 'Save', 'Save & Close', and 'Cancel' button bar.

The screenshot shows the 'Edit Client Record [Abigail Abby Andrews]' form. The top navigation bar includes Personal, Private, Scheduling (highlighted with a yellow icon), Agency, Billing, Contacts, Location, Notes, Financial, Reminders, Orders, Detail, Care Plans, Assessments, Holds, EVV, Prcauth, Message History, Files, and History. The 'Scheduling' tab is active. The form includes a 'Zone' dropdown menu set to 'Kellogg'. The 'Case Manager' dropdown menu is highlighted with a red box and set to 'Jones, Sally'. The 'Case Manager Info' field shows 'sallyjones@somedomain.com'. The 'Primary Employee' dropdown menu is empty. The 'Needs' section includes checkboxes for Check All, Diabetic Care, Lifting, Smoker, Cat(s), Dog(s), Memory Care, Covid Vaccinated, Hoyer Lift, and Requires Transportation. The 'Gender Preference' section includes radio buttons for Female, Male, and No Preference.

Export Projected Revenue Report to Excel

HOW TO USE:

1. When running the Projected Revenue Report, the Output File Type of Excel may be selected.
2. This will create an Excel file of the report.

The screenshot shows the 'Create Reports' window with a tree view on the left and configuration options on the right. The 'Projected Revenue' report is selected in the tree. The configuration panel on the right includes:

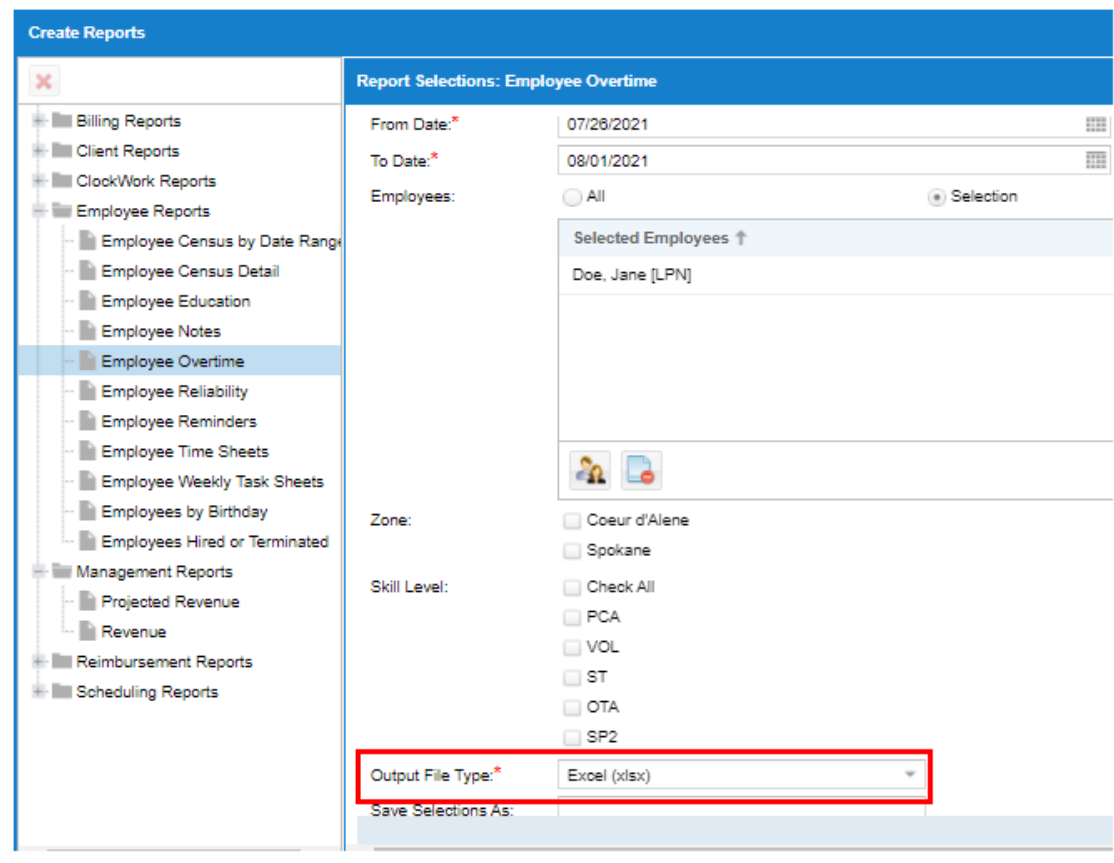
- Report Selections: Projected Revenue**
- From Date:** 08/01/2021
- To Date:** 08/07/2021
- Zone:** Coeur d'Alene, Spokane
- Type:** None
- Group By:** Zone
- Output File Type:** Excel (xlsx) (highlighted with a red box)
- Save Selections As:** [Empty text box]

	A	B	C	D	E	F
1	Type	VisitCount	ChargeCode	ChargeCodeDescripti	TotalHours	RevenueTotal
2	Attendant Care	7	35010	CNA Hourly	13	195
3	Homemaker Services	2	36010	Homemaker Hourly	4	64.16
4	Personal Care	15	36011	Personal Care Hourly	31	587.76
5	Skilled Nursing	2	33001	SN Visit	2	37.12
6	Skilled Nursing	2	33010	LPN Hourly	2	32
7						

Export Caregiver Overtime Report to Excel

HOW TO USE:

1. When running the Caregiver Overtime report, the Output type of Excel may be selected.
2. This will create an Excel file of the report.



	A	B	C	D	E
1	EmployeeName	FromDate	ToDate	ClientName	Hours
2	Doe, Jane 3.C,S,H,K	7/26/2021 12:00:00 AM	8/1/2021 11:59:59 PM	Andrews, Abigail [5.K]	13
3	Doe, Jane 3.C,S,H,K	7/26/2021 12:00:00 AM	8/1/2021 11:59:59 PM	Creed, Apollo [6.H]	28
4	Doe, Jane 3.C,S,H,K	7/26/2021 12:00:00 AM	8/1/2021 11:59:59 PM	Jordan, Michael [2.H]	10
5					
6					