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# CareWhen Mobile App Walkthrough

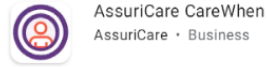
For Caregivers

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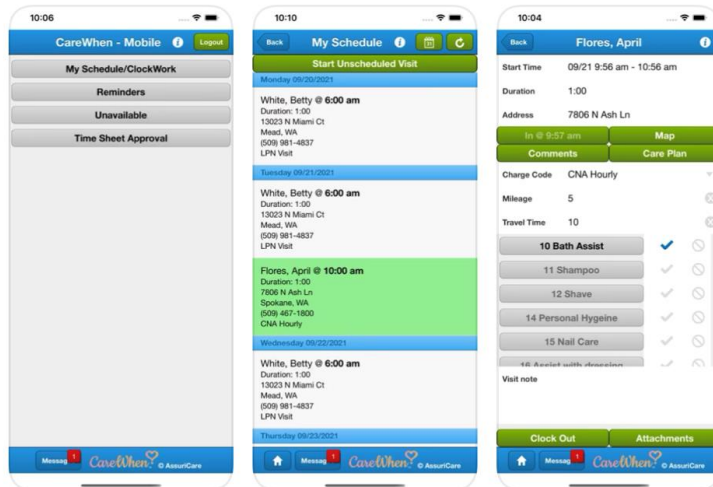
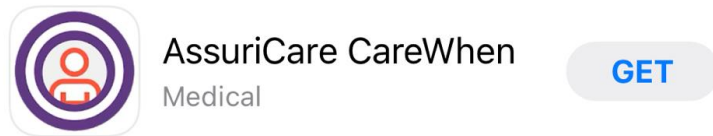


# Download & Install the CareWhen App

Find and install the AssuriCare CareWhen app by searching for “AssuriCare CareWhen” in the Google Play or Apple App Store.



## Apple App Store



## Google Play



Developer contact ▼

About this app →

Secure caregiver access to AssuriCare CareWhen home care scheduling

Business

Everyone

# Product Selection

Select appropriate environment your Agency is currently located in


**CareWhen Mobile**

Please select your AssuriCare product.

CareWhen USA

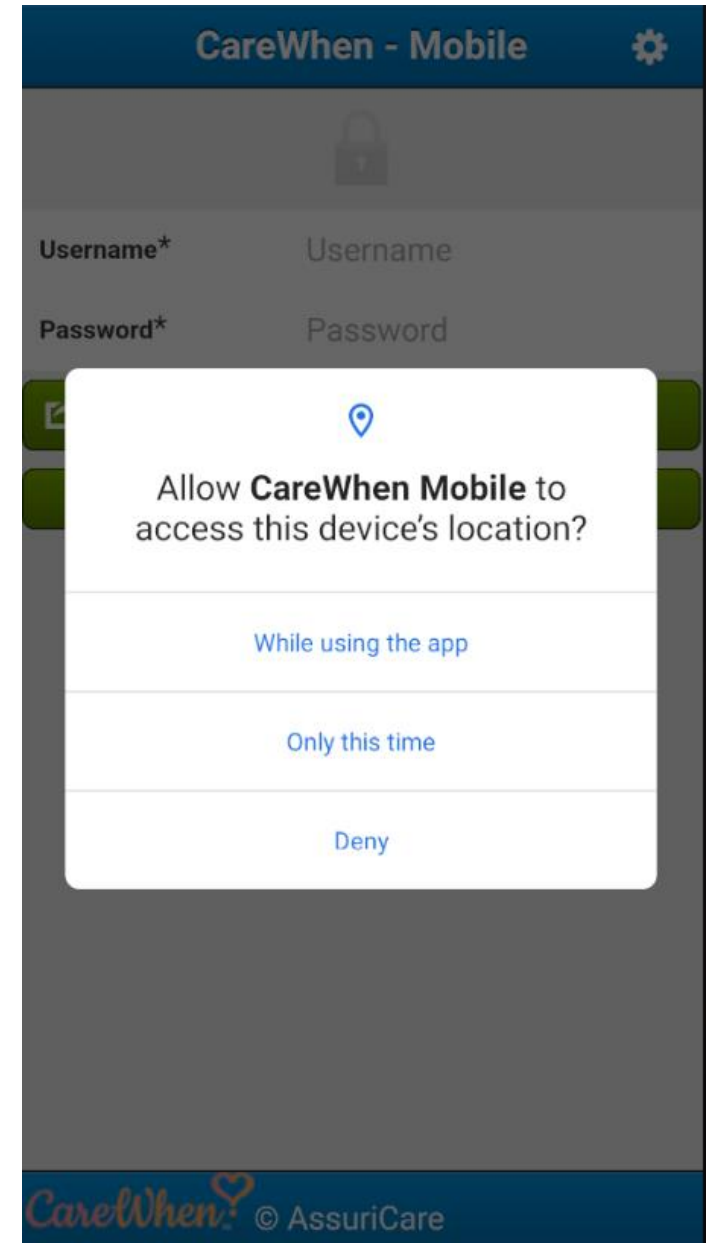
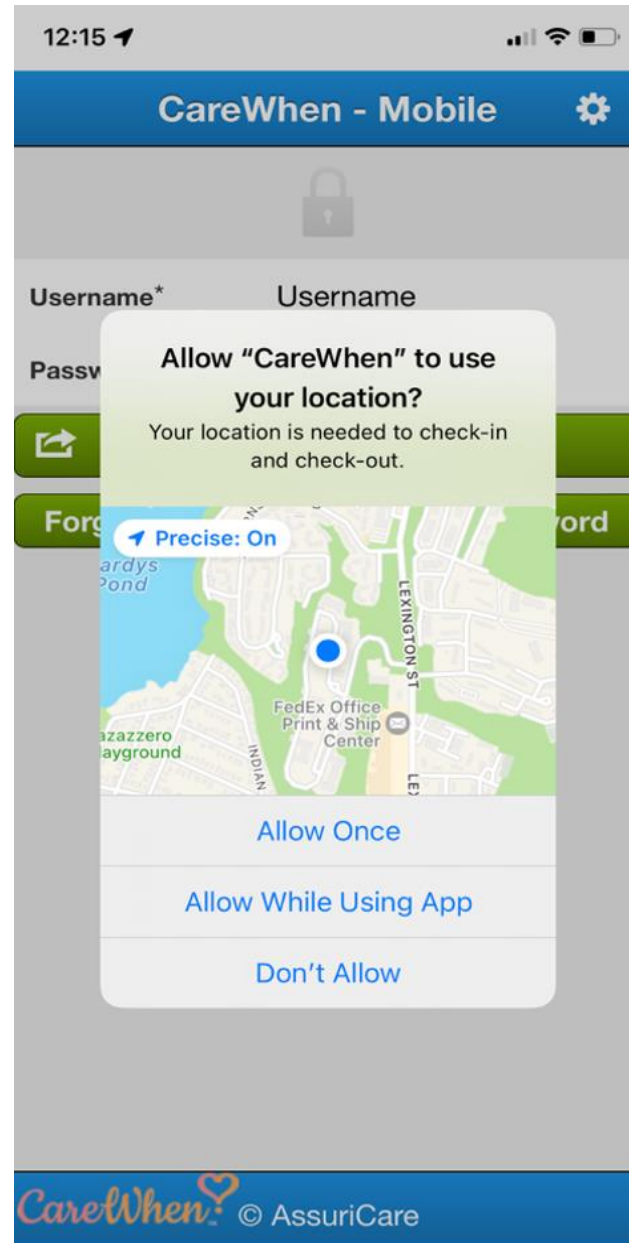
CareWhen Canada

CareWhen Detroit Wayne



# Enable location

Select an option "Allow While Using the App" on (iOS) and "While using the app" on (Android)



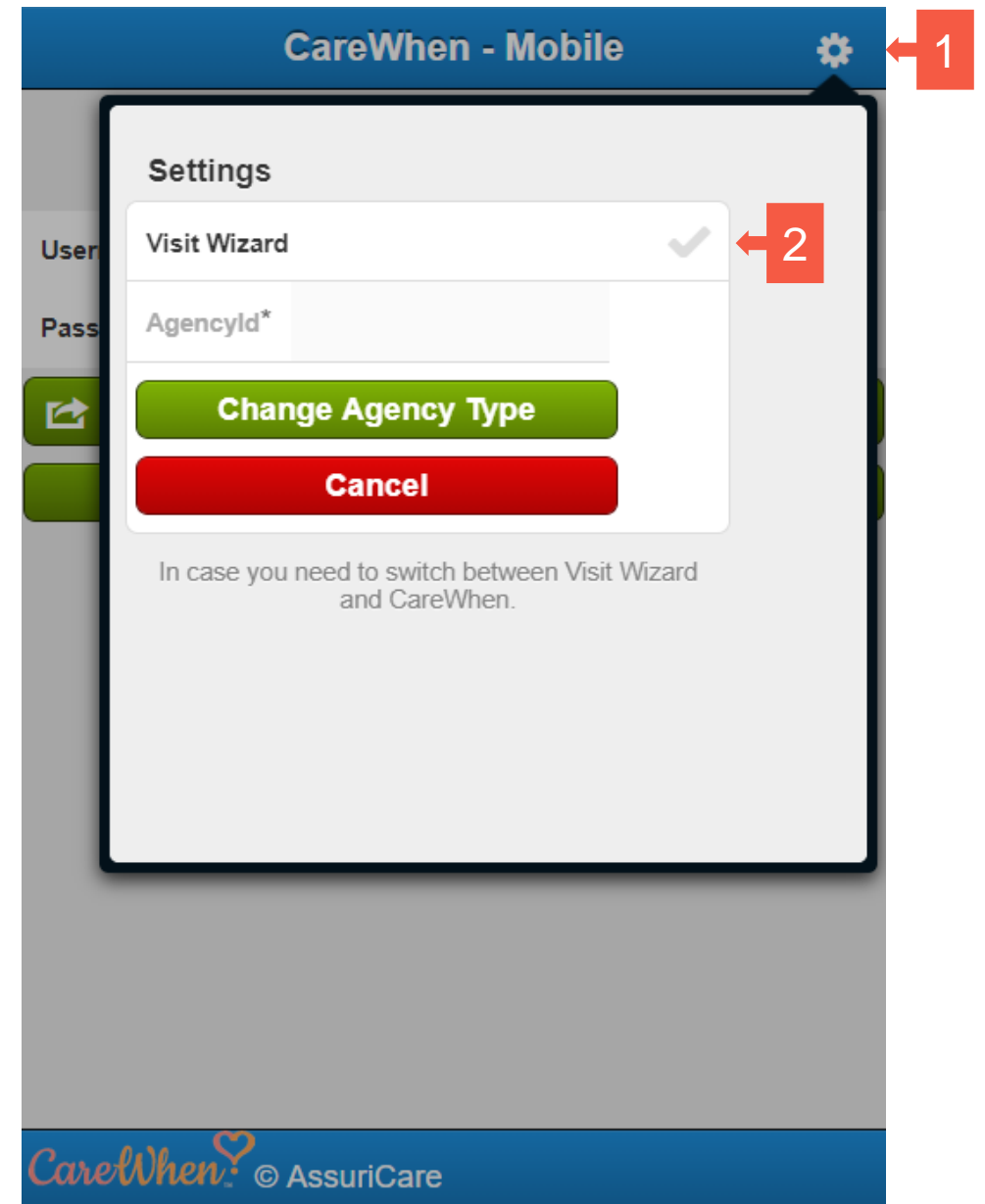
# Visit Wizard setup

This should only be used if your Agency is using the Visit Wizard Application

1. After installing the application for the first time, and before logging in, click the **Gear** icon in the upper right-hand corner.
2. Click on the checkmark to the right of the word **Visit Wizard**. The checkmark should be in **Bold** font when selected.
3. Enter the AgencyId value provided by your administrator. Select the “**Change Agency Type**” button to exit and return back to the Login screen.

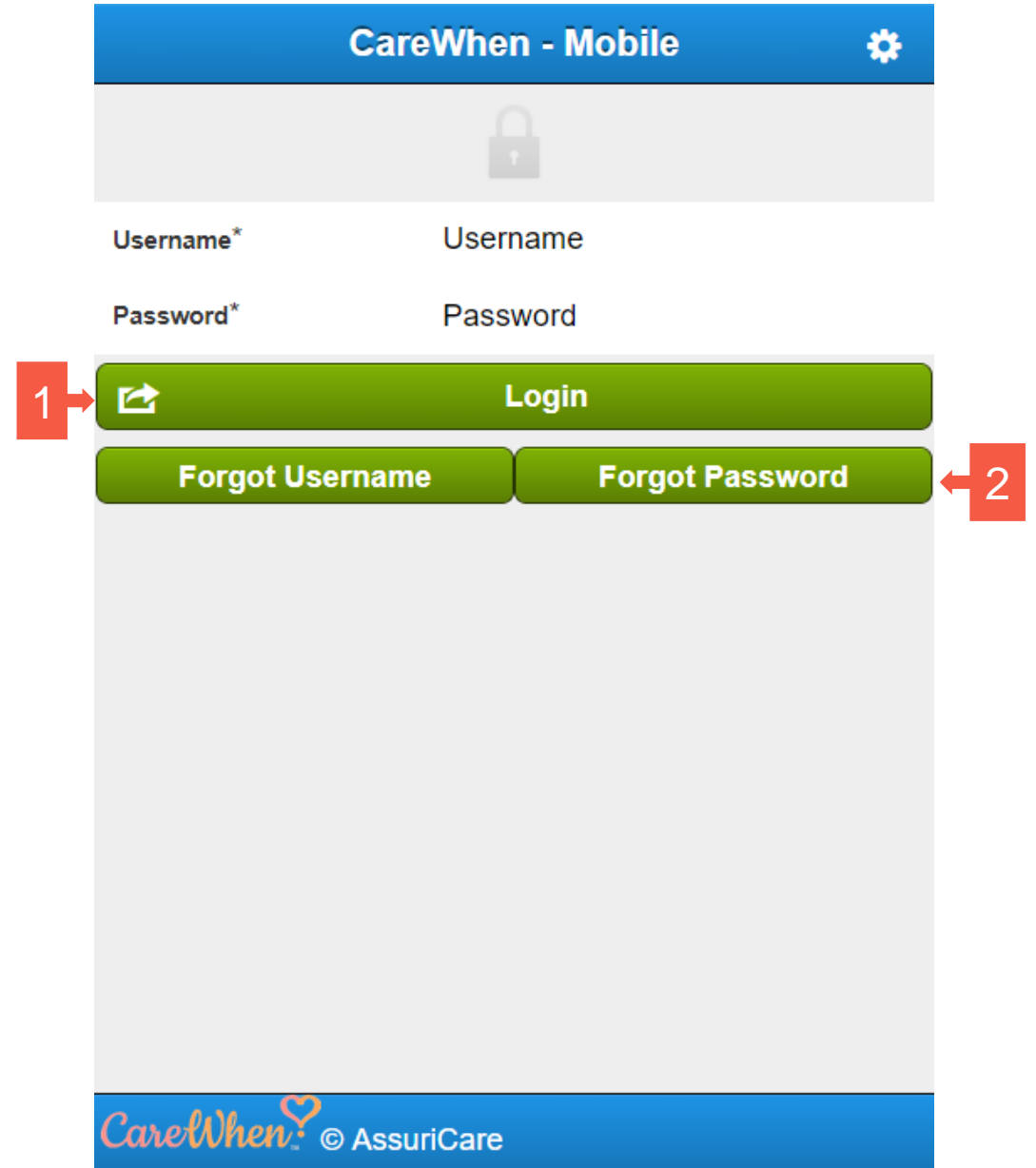
This will allow you to log in with your Visit Wizard credentials.

*Note: AgencyId setup only needs to be completed on initial login.*



# Login


1. **Login** to the app using your credentials.
2. If needed, you can use the **Forgot Username** or **Forgot Password** buttons to reset them.



# Credential Recovery Options

## Forgot Username

**CareWhen - Forgot Username**

  
Please enter your email address and birthdate.

Email:\*


Birth Date:\*

**Submit** **Cancel**

*CareWhen?* © AssuriCare

## Forgot Password

**CareWhen - Forgot Password**

  
Please enter your username and birthdate.

Username:\*

Birth Date:\*

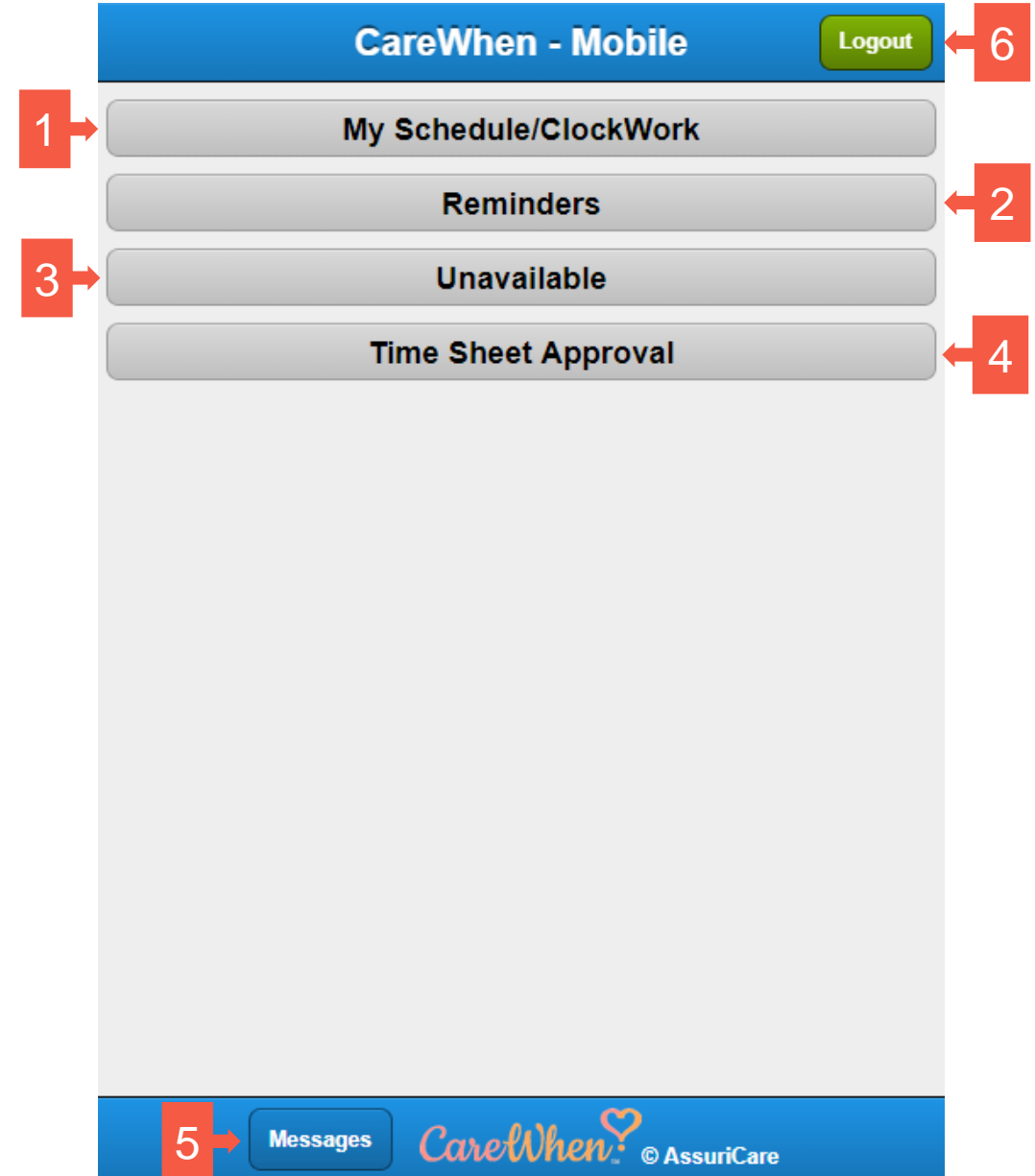
**Submit** **Cancel**

*CareWhen?* © AssuriCare

# Home Screen

From the home screen, you can:

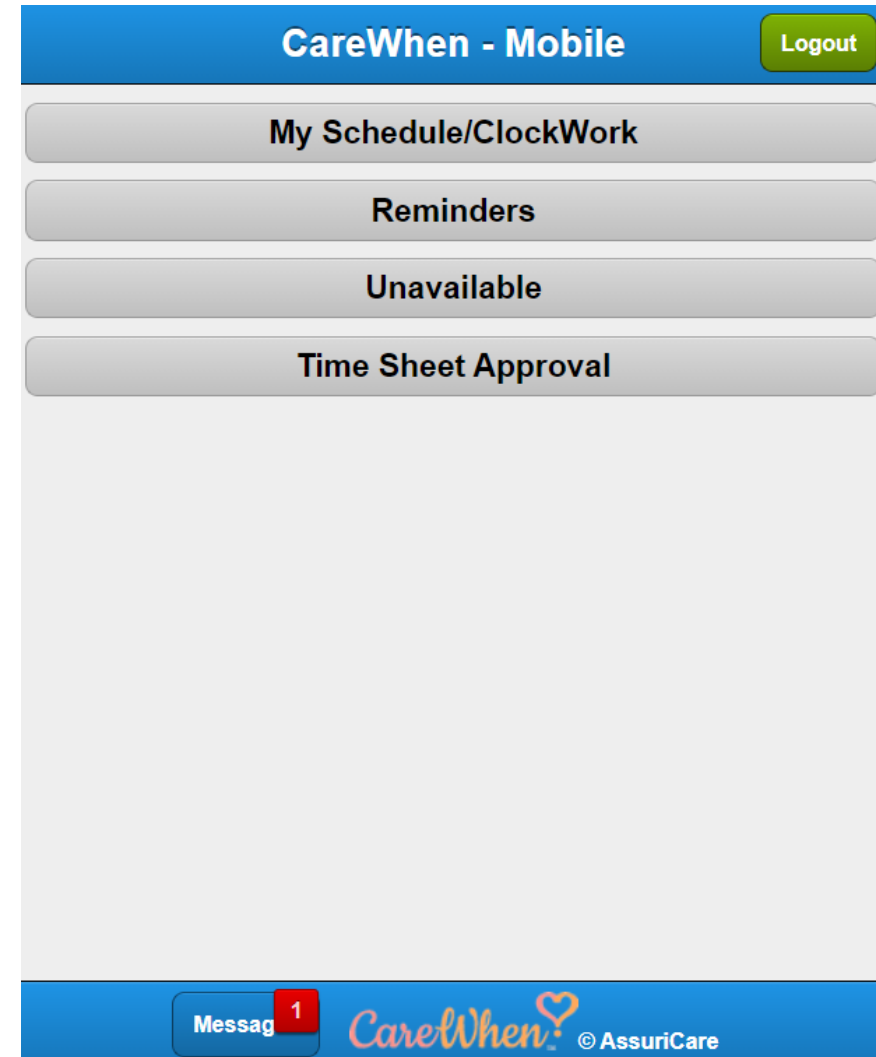
1. Access the **My Schedule / ClockWork** area
2. View **Reminders**
3. View **Unavailable** time
4. Access **Time Sheet Approval** (it is an optional Agency setting)
5. Access Agency Internal **Messages** from the button at the bottom
6. **Logout**





# View Messages

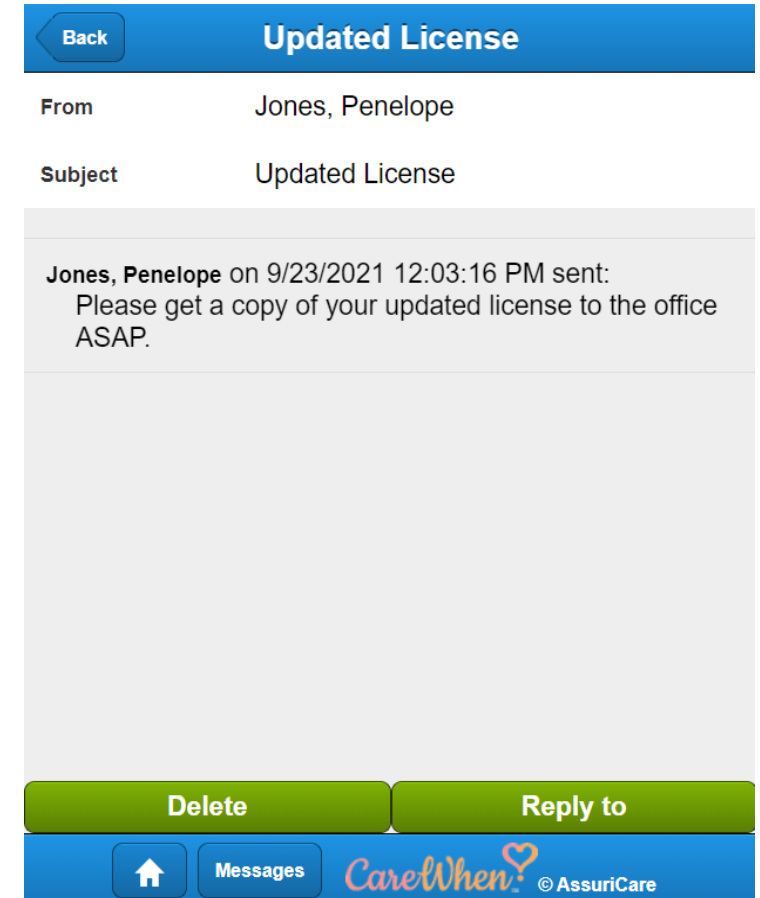
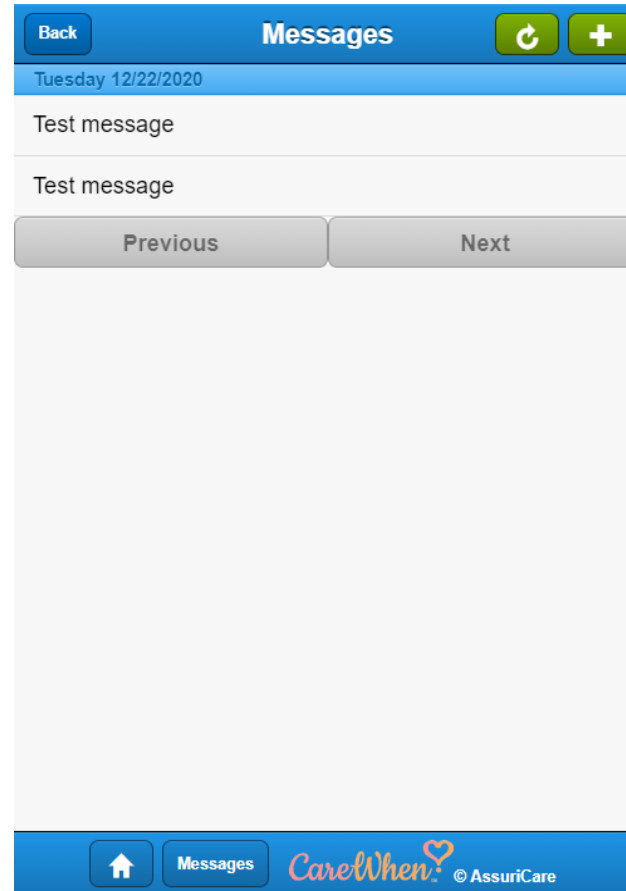
1. Click on the on the Message tab on the bottom of the screen to view messages. A red icon with the number of unread messages will be shown if you have new messages.



# Open Messages

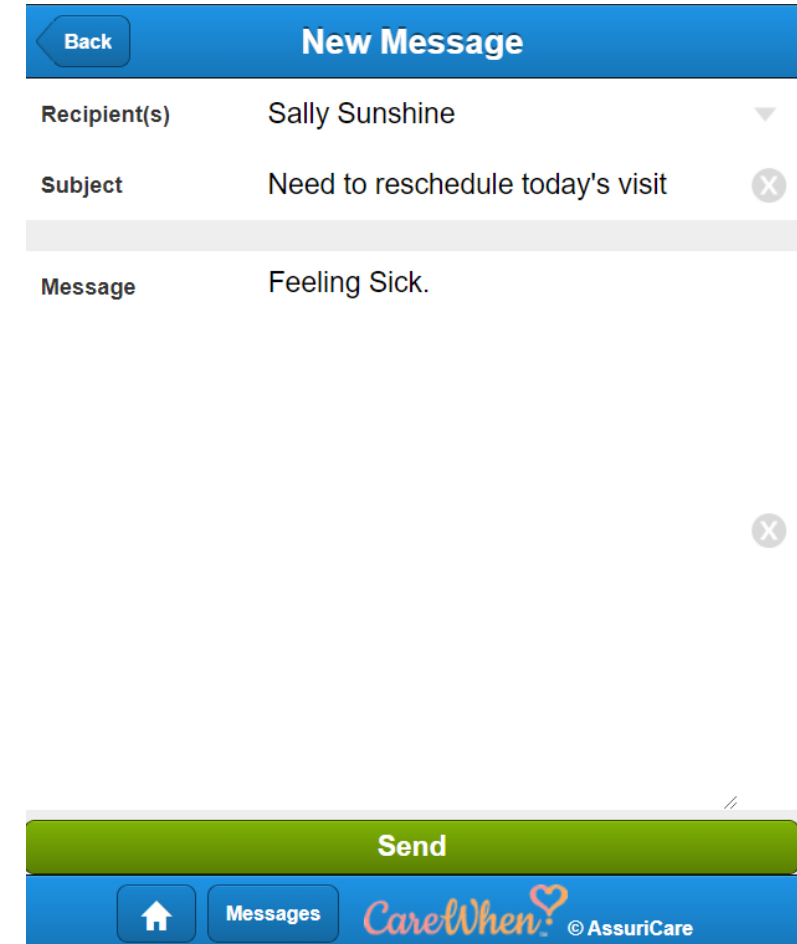
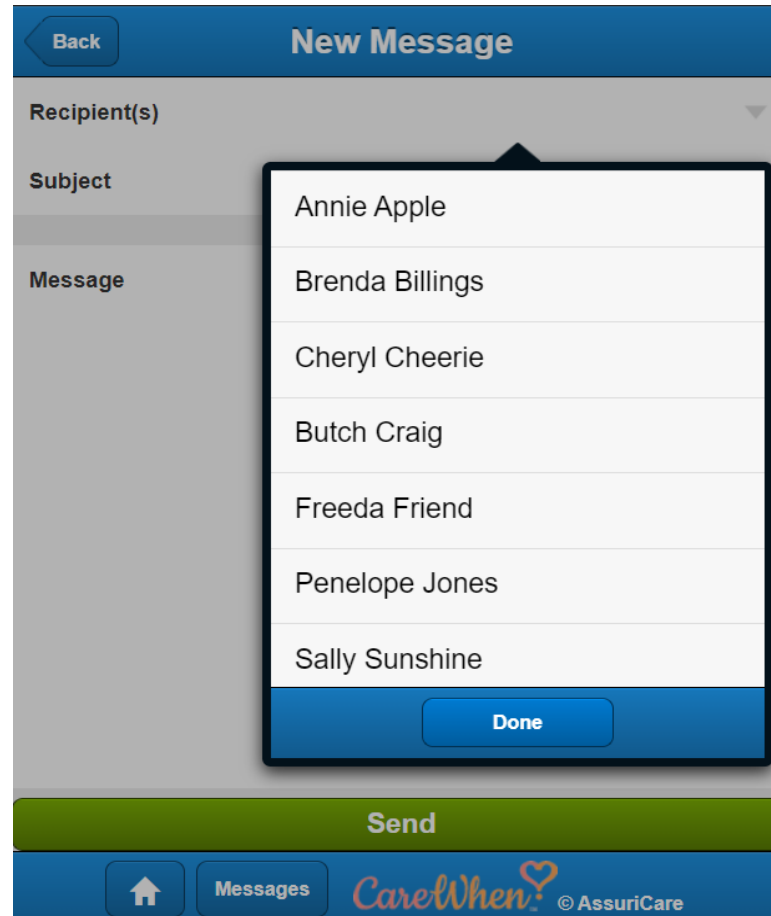
Agency Internal Messages may be viewed or composed from the Messages screen. If a group message is sent out, only the originator will see the replies from the group.

1. Click on one of your existing messages to open it.
2. Use the “+” icon to author a new message
3. Use the green circular “Refresh” button to refresh the page and search for new messages
4. Use the “Home” icon on the footer to return to the home page



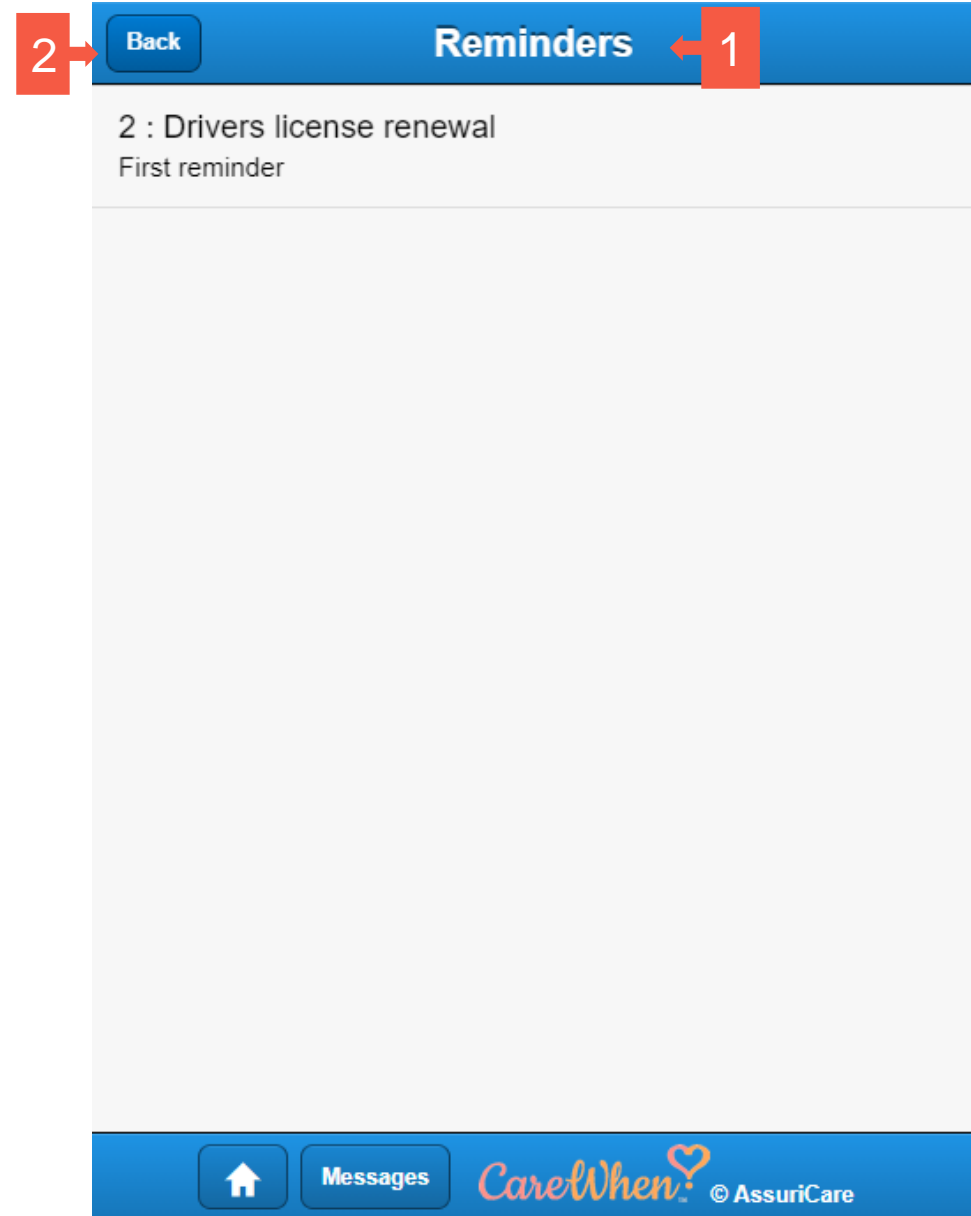
# Composing Message

1. Select the "+" icon to author a new message
2. select the desired recipient
3. Enter Subject
4. Compose message and send



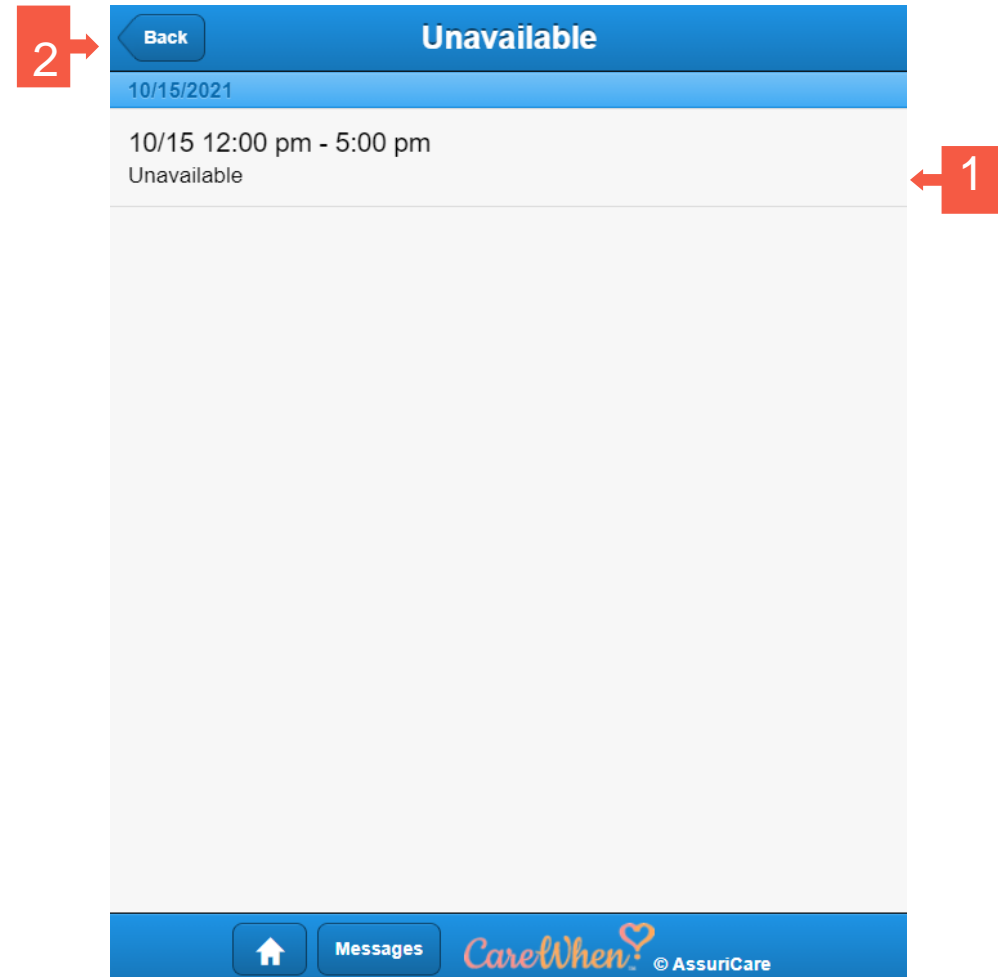
# Reminders

1. Reminders sent from the Agency to you will be displayed under the Reminders area. This is accessed by clicking the **Reminders** button on the home page.
2. Use the **Back** button to return to the home page.



# Unavailable

1. Times that you have told the Agency that you're not available will be displayed under the Unavailable page. This is viewed by clicking the **Unavailable** button from the home page.
2. Use the **Back** button to return to the home page.



# My Schedule / ClockWork

The My Schedule page allows you to view all completed, ongoing, and upcoming visits in your schedule.

1. Use the **Refresh** icon to refresh the schedule and check for changes
2. Use the **Calendar** icon to display a monthly calendar view

**GREY** visits have been completed

**GREEN** visits are visits that have been started

**WHITE** visits are upcoming visits

**CONTIGUOUS** are related visits that will be started and completed as a group

Back My Schedule 2 1

Start Unscheduled Visit

Wednesday 09/22/2021

Love, Charlie @ 7:00 am  
Duration: 1:00  
102 5th Ave  
Waltham, MA  
(222) 333-4444  
CNA Hourly

Andrews, Abigail @ 10:00 am  
Duration: 4:00  
144 Ridge Ln  
Waltham, MA  
(727) 888-8800  
Live In Day

CONTIGUOUS  
Andrews, Abigail @ 2:00 pm  
Duration: 4:00  
144 Ridge Ln  
Waltham, MA  
(727) 888-8800  
CNA Hourly

Vineyard, Martha @ 3:00 pm  
Duration: 1:00  
101 5th Ave  
Waltham, MA  
(111) 222-3333  
CNA Hourly

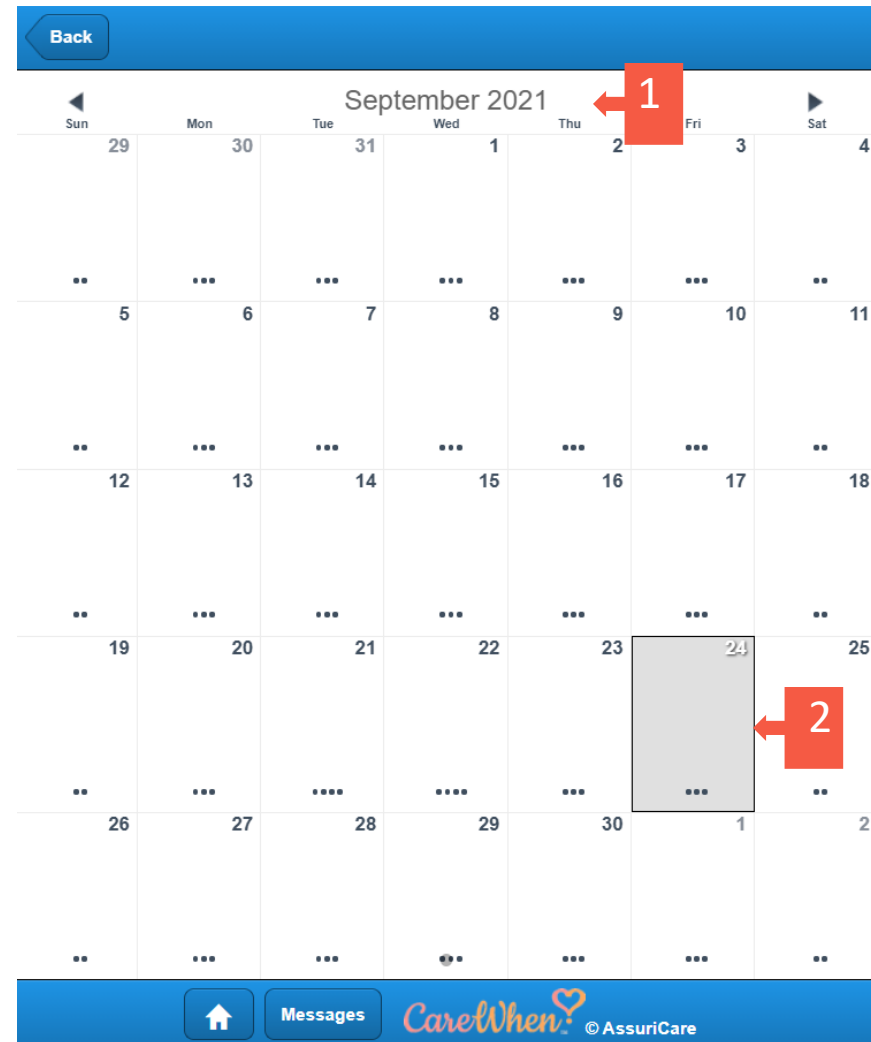
Messages CareWhen? © AssuriCare

# My Schedule > Calendar View

1. The calendar view will display a monthly view; the current day is displayed in light grey.
2. Days with visits have small grey dots. In this example, there are four visits scheduled for today, September 24th, and three occurred yesterday.

Each day is selectable and will bring you to the daily schedule view for that day.

If there is nothing scheduled for that day, the daily schedule screen will be blank.



# My Schedule / ClockWork Cont.

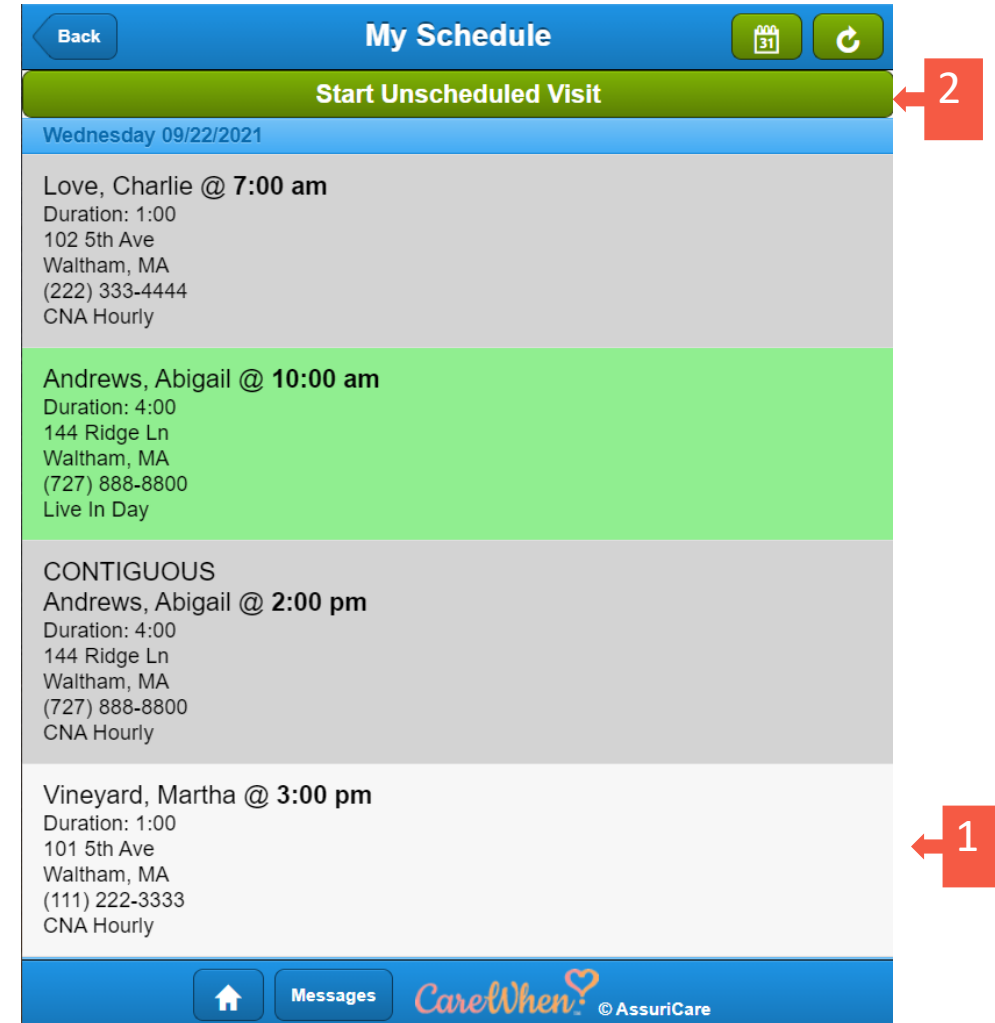
Two paths are available from this page:

1. Scheduled Visit: You can tap on any visits, either to view information on completed visits, continue with active visits, or view information / check in to future visits.

OR

2. Unscheduled Visit: If used by the Agency, you can start an Unscheduled Visit by using the **Start Unscheduled Visit** button.

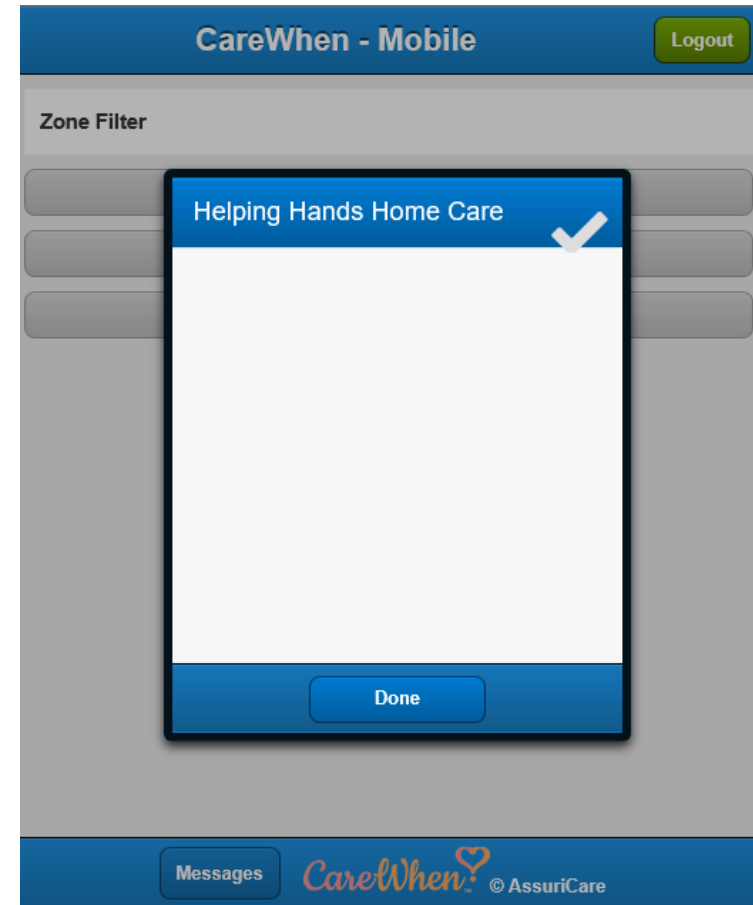
**Note:** for specific agencies you may optionally select multiple visits to start them concurrently.





# My Schedule / ClockWork Cont.

1. You may **optionally** have a selection to limit the visits displayed on the schedule to one or multiple Zones.
2. The selection will initially default to All Zones. Click on the Zone Filter dropdown and select individual Zones.



# Visit Page – Overview

When you click on a visit from the schedule page, you are taken to the visit page. There are several options available on the visit page.

1. Use the **Map** button to view the Client’s address on a map in relation to your current location
2. Use the **Care Plan** button to view the services listed under the Client’s Care Plan
3. Use the **Comments** button to view any visit comments left by the Agency pertaining to the visit
4. Use the **Clock In** button to start the visit

**Back** Carr, Clyde

Start Time 12/22 3:30 pm - 4:30 pm

Duration 1:00

Address 6708 Tyrone Blvd N

Live In Day

**4** → **Clock In** **Map** ← **1**

**3** → **Comments** **Care Plan** ← **2**

Mileage

Travel Time

*R 13 Meals	✓	⊘
10 Bathing- assist with shower	✓	⊘
11 Bathing- Bed bath	✓	⊘
12 Dressing	✓	⊘

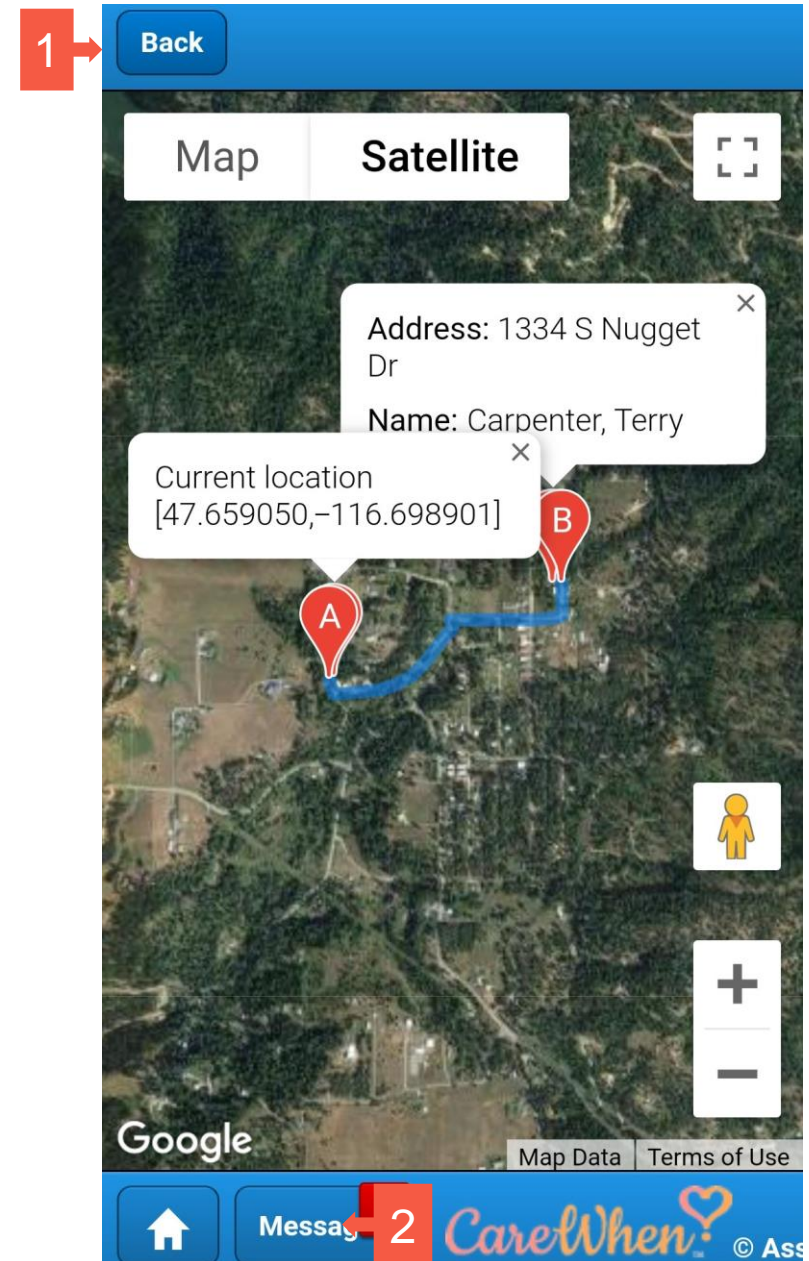
Visit note

**Home** Messages CareWhen! © AssuriCare

# Visit Page – Map

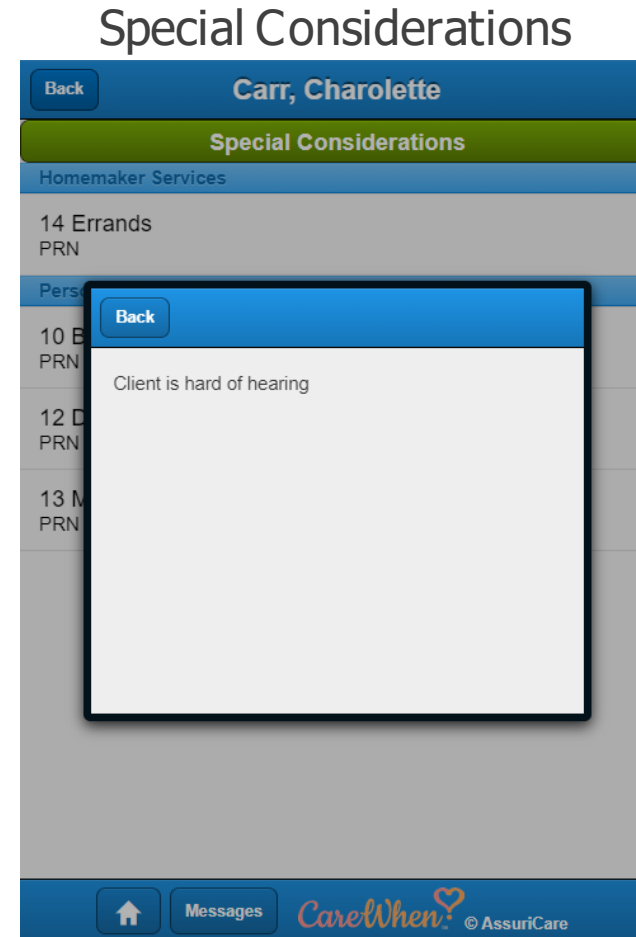
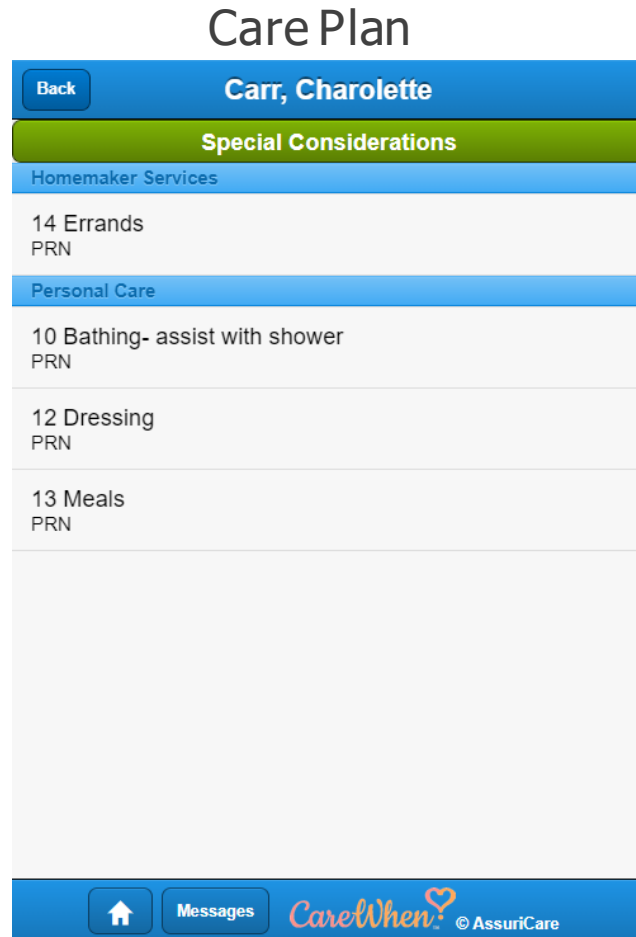
Use the **Map** button to view a Google Maps-powered view of the distance and path between your current location and the Client's address.

1. Use the **Back** button to return to the Visit page, the **Home** icon to return to the Home Page,
2. Use the **Messages** button to view your messages.



# Visit Page – Care Plan

You can view a Client's Care Plan by clicking the Care Plan button. Additionally, tap the Special Considerations button to view specific information input by the Agency for the Client.



# Visit Page – Starting a Visit

1. When you're ready to begin a visit, start by clicking the Clock In button.
2. **Important:** After clicking Clock In and beginning the visit, you must wait for the electronic visit verification (EVV) data to be sent before closing out of the app. This is indicated by a **red** loading icon that will appear at the bottom of the visit page. This icon will turn green when data has been sent.

At this point, you can close the app and proceed with the visit.

The screenshot displays the 'eWhen' app interface for a visit to 'Carr, Charolette'. The top navigation bar is blue with a 'Back' button and the name 'Carr, Charolette'. Below this, the visit details are listed: 'Start Time' (12/22 3:16 pm - 7:16 pm), 'Duration' (4:00), and 'Address' (521 N Argonne Rd). A red box with the number '1' and an arrow points to the 'In @ 3:16 pm' button. To the right of this button are 'Map', 'Comments', and 'Care Plan' buttons. Below these are fields for 'Charge Code' (Personal Care Hourly), 'Mileage', and 'Travel Time'. A list of services is shown with checkboxes: '\* 10 Bathing- assist with shower', '\* 12 Dressing', '\* 13 Meals', and '\* 14 Errands'. At the bottom, there is a 'Visit note' field. The bottom navigation bar is blue and contains icons for Home, Messages, a red clock icon (with a red box and '2' and arrow pointing to it), and the eWhen logo with '© AssuriCare'.

# Visit Page – Completing a Visit

1. When re-opening the app to complete the current visit, you must tap on the in-progress visit from the My Schedule page. In-progress visits are highlighted in green.



**My Schedule**

Start Unscheduled Visit

Wednesday 09/22/2021

Love, Charlie @ 7:00 am  
Duration: 1:00  
102 5th Ave  
Waltham, MA  
(222) 333-4444  
CNA Hourly

**Andrews, Abigail @ 10:00 am**  
Duration: 4:00  
144 Ridge Ln  
Waltham, MA  
(727) 888-8800  
Live In Day

CONTIGUOUS  
Andrews, Abigail @ 2:00 pm  
Duration: 4:00  
144 Ridge Ln  
Waltham, MA  
(727) 888-8800  
CNA Hourly

Vineyard, Martha @ 3:00 pm  
Duration: 1:00  
101 5th Ave  
Waltham, MA  
(111) 222-3333  
CNA Hourly

Home Messages CareWhen! © AssuriCare

# Visit Page – Completing a Visit

Tasks are entered once a visit has been completed:

1. Clockwork Tasks are marked “completed” or “refused” by using the buttons next to the task.
2. Tasks displayed with an asterisk are part of the Client’s care plan. Tasks marked with an “R” are required tasks for that visit. Click on the Task Name to enter a comment if desired. Tasks that turn Red require a comment to be entered.
3. If the Agency tracks mileage and travel time, you can enter **Mileage** and **Travel Time** here.
- 4) You can enter a **Visit Note** at the bottom of the page.

**Back** Carr, Clyde

Start Time 12/22 3:30 pm - 4:30 pm

Duration 1:00

Address 6708 Tyrone Blvd N

Live In Day

**Clock In** **Map**

**Comments** **Care Plan**

**3** → Mileage

Travel Time

**2** → \*R 13 Meals

10 Bathing- assist with shower

11 Bathing- Bed bath

12 Dressing

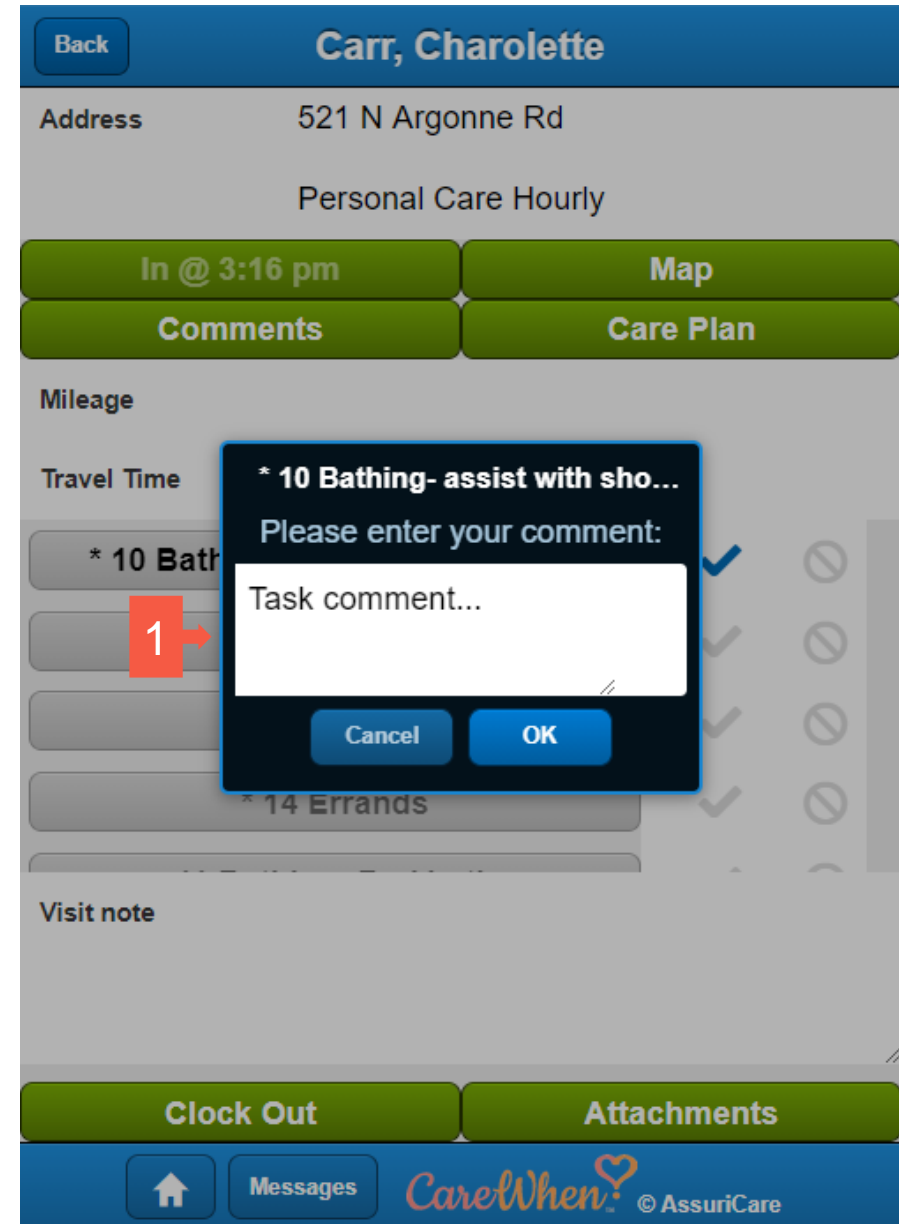
**1** ←

**4** → Visit note

**Home** Messages **CareWhen!** © AssuriCare

# Visit Page – Completing a Visit (cont.)

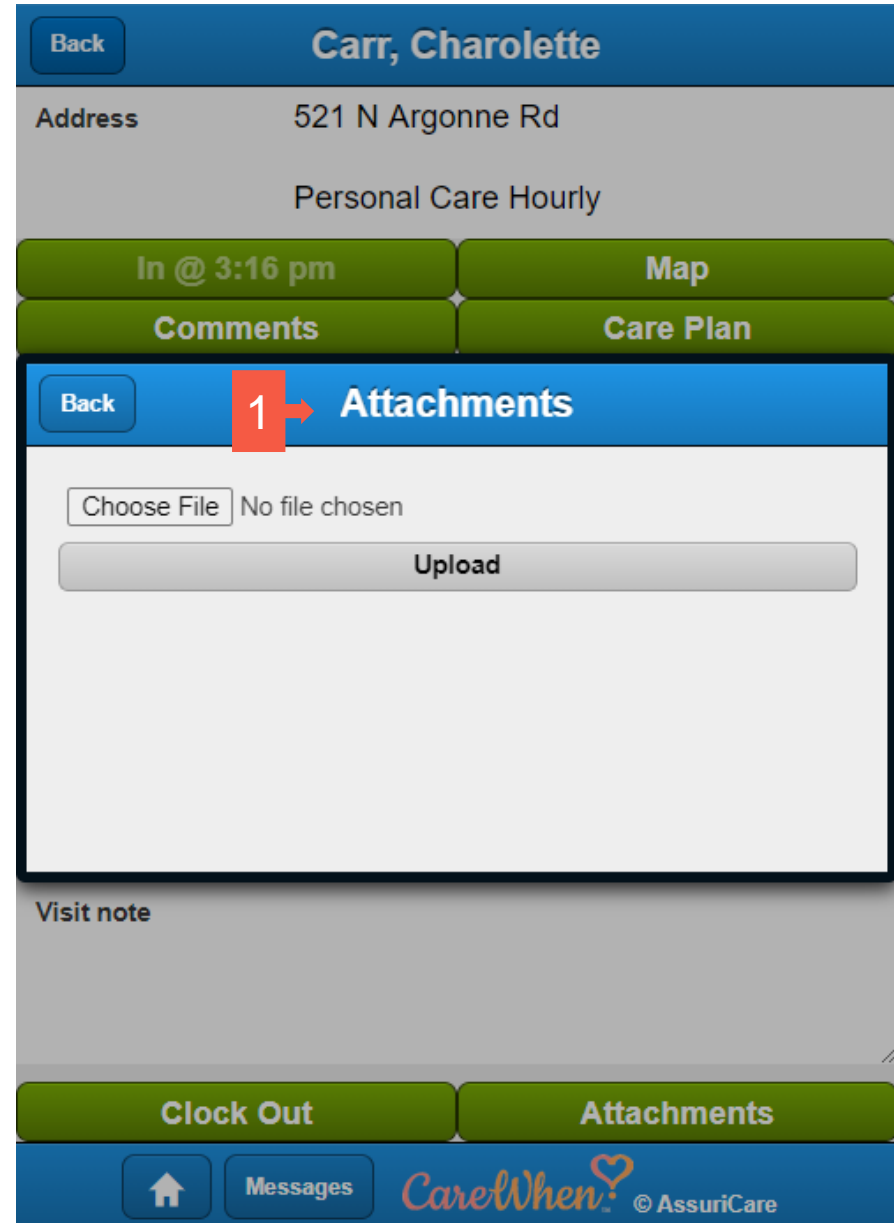
- 1) Once you mark a task as complete or not complete, you can leave comments on the task by selecting the task, entering the comment, and tapping **OK**.





# Visit Page – Attachments

- 1) If used by the Agency, you can upload attachments to the visit via the **Attachments** button. Common attachments may include visit-specific documents, such as pictures of signed time sheets.



# Visit Page – Clock Out (Caregiver)

Tapping the **Clock Out** button will initiate the clock out process and take you to the Clock Out page.

- 1) If required by the Agency, you should digitally sign off on the visit in the signature area
- 2) Click **Accept** to proceed after signing
- 3) Click **Start Over** to re-enter the signature
- 4) Use the **Show all Performed / Declined items** button to view all completed or declined tasks from the visit
- 5) Use the **Cancel** button to return to the visit page

After signing, hand your mobile device to your client for their signature.

The screenshot displays the 'Caregiver Signature' interface. At the top, a blue header reads 'Caregiver Signature'. Below it, a grey box contains the text: 'Event Summary: Tue 3:16 pm - 11:05 am' and 'Acknowledged by: Please sign below.'. A green bar contains five buttons: 'Show all Performed/Declined items' (labeled 4), 'Accept' (labeled 2), 'Start Over' (labeled 3), and 'Cancel' (labeled 5). Below the buttons is a white signature area (labeled 1) containing a handwritten signature 'Aa'. The bottom of the screen is a grey bar.

# Visit Page – Clock Out (Client)

- 1) Once the Caregiver signature has been accepted, the Client must sign off on the visit, as well.
- 2) Use the **Accept** button to approve the Client signature
- 3) Use the **Start Over** button to clear the signature
- 4) The Client may use the **Show all Performed Items** button to review items marked by the Caregiver as completed.
- 5) If the Client is unable to sign, click **Unable to Sign**. This will prompt a note to be entered explaining why the Client cannot sign off on the visit.

The screenshot displays a mobile application interface for signing off on a visit. At the top, a blue header reads "Signature for Carr, Charolette". Below this, a grey box contains the text "Event Summary: Tue 3:16 pm - 11:20 am" and "Acknowledged by: Please sign below.". A green bar contains five buttons: "Show all Performed items" (with a red '4' and arrow pointing right), "Accept" (with a red '2' and arrow pointing left), "Start Over" (with a red '3' and arrow pointing right), "Cancel", and "Unable to Sign" (with a red '5' and arrow pointing left). Below the buttons is a white signature area with a red '1' and arrow pointing to a handwritten "C".

# Visit Page – Visit Complete

Once you and the Client have signed off on the visit, the Mobile App will return to the Schedule page.

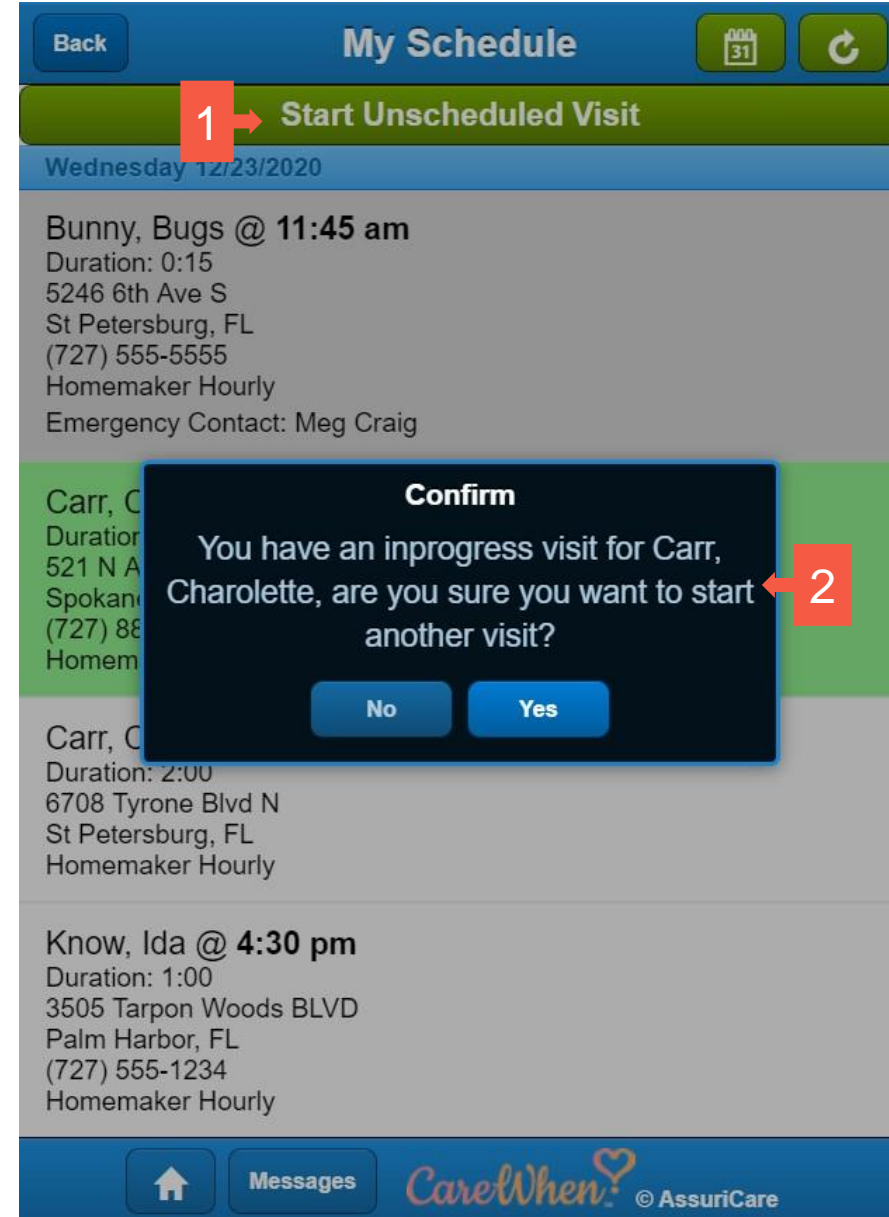
The previously completed visit will turn light grey. The visit is clickable for review purposes, but In and Out times cannot be edited, and Tasks cannot be selected.

The screenshot shows a mobile application interface for a completed visit. At the top, there is a blue header bar with a 'Back' button on the left and the text 'Newcomer, Lester' on the right. Below the header, the 'Address' is listed as '1334 S Nugget Dr'. Underneath, it says 'CNA Hourly'. There are two rows of green buttons: the first row contains 'In @ 8:18 am' and 'Map'; the second row contains 'Comments' and 'Care Plan'. Below these buttons, the 'Mileage' is shown as '0' and 'Travel Time' as '15'. A list of tasks follows, each in a grey button with a checkmark and a no-selection icon to its right: '\* 12 Dressing', '\* 13 Meals', '\* 14 Errands', and '10 Bathing- assist with shower'. Below the tasks, there are two 'Visit note' fields. At the bottom, there are two more green buttons: 'Out @ 8:27 am' and 'Attachments'. The very bottom of the screen features a blue navigation bar with a home icon, a 'Messages' button, and the 'CareWhen' logo with '© AssuriCare'.

# Unscheduled Visit

1. Start this process by clicking on the **Start Unscheduled Visit** button.
2. Note: If another visit is in progress, a warning prompt will appear before initiating an unscheduled visit.

## Visit-in-progress alert



# Client Selection

Once you have initiated an unscheduled visit, select the desired Client that the visit will be for.

1. Select the Client from the list to continue.
2. Use the **Back** button to return to schedule page
3. Use the **Home** button to return to the home page

**Back** ← **2** Start a Visit for

**1** → Andrews, Abigail  
7280 N Stable Ln  
Prescott, AZ  
7278888800

Bunny, Bugs  
5246 6th Ave S  
St Petersburg, FL  
7275555555  
Emergency Contact: Meg Craig

Carr, Charolette  
521 N Argonne Rd  
Spokane Vly, WA  
7278885555

Invoice, Ina  
940 5th Ave S  
St Petersburg, FL  
5094753369

**3** → Messages CareWhen? © AssuriCare

# Visit Page

After selecting the Client, you are taken to the visit page. This page is like the visit page for a scheduled visit, except for one important difference.

1. Before Clock In on an unscheduled visit, the Caregiver must select the charge code to be used for the services rendered.
2. To set the applicable charge code, the Caregiver must tap on the charge code area to reveal the list of options.

**Back** **Andrews, Abigail**

Start Time 12/23 3:07 pm - 7:07 pm

Duration 4:00

Address 7280 N Stable Ln

**Clock In** **Map**

**Comments** **Care Plan**

**1** → Charge Code Personal Care Hourly ← **2**

Mileage

Travel Time

- \*R 11 Bathing- Bed bath ✓ ⊘
- \*R 12 Dressing ✓ ⊘
- 10 Bathing- assist with shower ✓ ⊘
- 13 Meals ✓ ⊘

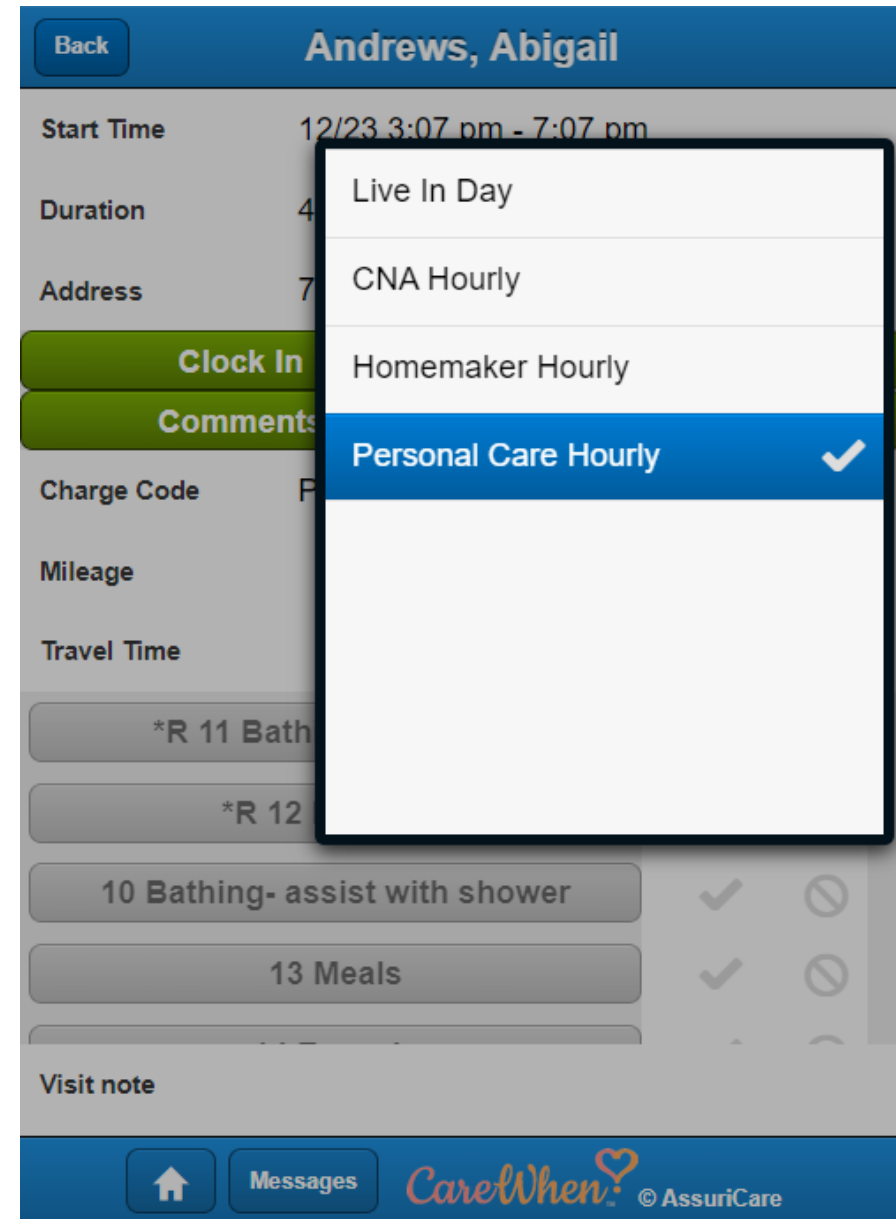
Visit note

**Home** **Messages** **CareWhen?** © AssuriCare

# Visit Page – Charge Code

1. Select the appropriate charge code from the list. The rest of the visit process is carried out the same way as scheduled visits.

If a Client has an associated default charge code for unscheduled visits, it will populate the area automatically.



Unscheduled Visit – Visit Page – Charge Code list