Personal Accounting Services, Inc.
Part of the AssuranceSD Family

The following guide provides instructions on how to install our CareWhen mobile app and how to enter time worked.

DOWNLOADING & INSTALLING THE APP

For Android & Apple Devices

1. Open the **Google Play Store** (Android) or the **App Store** (Apple).
2. Search for **CareWhen**.
3. Download and install the app.

LOGGING INTO THE APP

1. **Open the App.** Tap the *CareWhen* icon on your device.
2. **Enter Your Username.** Tap the *Username* field and enter your username.
   **Username is not case sensitive.
   Example format: P01.JoeS.
3. **Enter Your Password.** Tap the *Password* field and enter your password.
   Initial password format: LastName + FirstInitial
   Example: SmithJ
4. **Tap Login.** Press the green *Login* button.
   ⚠️ Do not tap the screen again while it loads—this can cause errors.

Successful Login

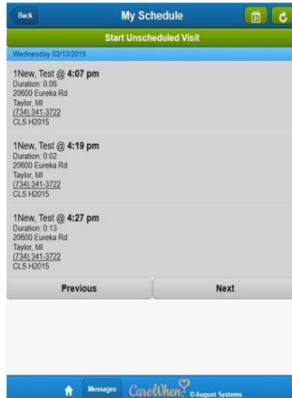Once logged in, you will see the main menu options, such as:

- My Schedule / ClockWork
- Reminders
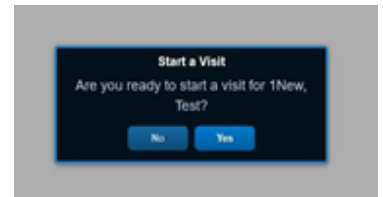- Unavailable
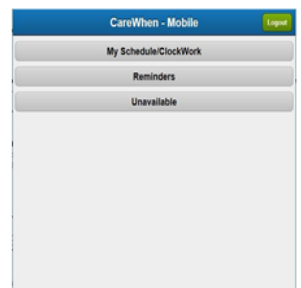
CLOCKING IN – BEGINNING OF SHIFT

1. Open My Schedule / ClockWork. Tap *My Schedule / ClockWork* on the main screen. The screen will switch to your schedule.
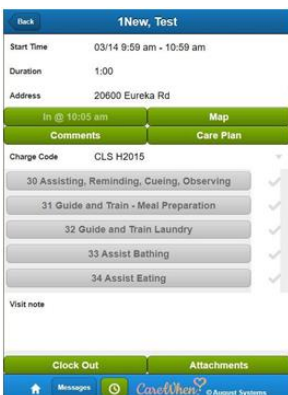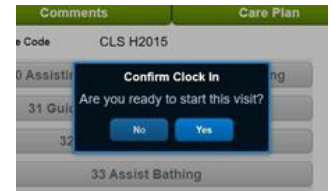
2. Tap *Start Unscheduled Visit.*

3. Select the Employer. Choose the correct employer from the list. When prompted, tap *Yes* to confirm.

4. Clock In. On the next screen, tap *Clock In*. Confirm again by tapping, *Yes*.

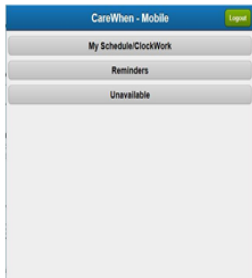**5. Confirm Clock-In.** The screen will update to show your clock-in time.

6. Return to Home. Tap the *Home* icon (bottom left).

7. Logout. Tap *Logout* to exit the app.

END OF SHIFT PROCEDURES

1. Open the App. Tap the *CareWhen* app icon on your mobile device and log in. Reference the section *Logging Into the App* above, if needed.

2. Open My Schedule / ClockWork. This will change the screen to the schedule view.

3. Select Your Active Shift. You will see previous clock-ins and any current active shifts. The active shift will be highlighted in green.

Tap the active shift.
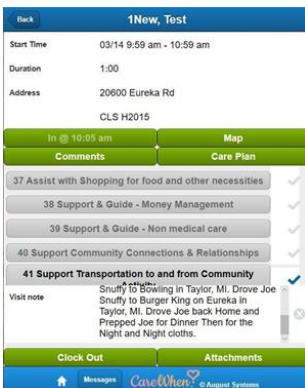
4. Complete Tasks. Check off completed tasks by tapping the white boxes.

Visit Notes (Required)

1. **Enter Visit Notes** describing what you did during the shift. You can type or use the microphone icon to dictate notes.

   Visit Notes must include:
   - Participant's first and last name
   - Date of service
   - Time in / Time out
   - Correct documentation of overnight shifts
     Example: 7pm–12am is one day; 12am–9am is the next day
   - Total hours/units/miles/meals
   - Participant signature verifying services

- Tasks or work performed
- Progress notes (written summary describing tasks completed during the shift)
- Identification of the worker providing the service and worker signature. Service workers must sign each service entry.

Additional requirements by service type:

Transportation
- Start and stop address
- Miles traveled
- Participant or representative signature

Chore Services
- Description of service delivered (e.g., lawn cut, driveway cleared)
- Heavy-duty cleaning tasks listed individually

Environmental Accessibility & Adaptations
- List all supplies
- Provide a quote before services are rendered

Home Delivered Meals
- List the number of meals delivered/provided

The program requires that you enter a summary of services delivered. This should be a written account of the tasks performed for the day/shift and should reflect only what took place during that shift. The tasks performed should reflect ONLY what is in the Participant's service plan.

> **Please Note:** Documenting all tasks performed in a 12-hour shift should not mirror tasks that were provided in a 4-hour shift.

Examples of appropriate written summaries:

Helped Participant get dressed, made breakfast, did laundry, cleaned floor.

Jane tolerated her shower well today. We went grocery shopping. Laundry was washed, folded, dried, and put away. Jane is in good spirits today.

Mom was having pain today. She took prescribed medication and is feeling better.

These statements can be included in a written summary, but by themselves, they do not make a complete summary:

Provided well-being and safety.

Tasks completed.

Really sick.

Clocking Out

1. Tap Clock Out. Tap the green *Clock Out* button at the bottom left of the screen.

2. Confirm Clock Out. Tap *Yes* when prompted.

3. Employee Signature. Screen will show Employee Signature. Sign with your first and last name in the white box. Tap the green *Accept* button.

4. Employer Signature. Screen will show Signature for the Active Shift. Employer signs first and last name in the white box. Employer taps the green Accept button. Screen returns to the Schedule view.

SHARED SERVICES/TIME

Shared time occurs when you are authorized to provide services to **more than one Participant at the same time** (e.g., siblings in the same home).

Clock in and out for each Participant individually.

Use the correct service code from your IPOS.

St. Clair Authorized Service Codes

CLS

CLS H2015 – 1 PARTICIPANT

CLS H2015 UN – 2 PARTICIPANTS

CLS H2015 UP – 3 PARTICIPANTS

CLS H2015 UQ – 4 PARTICIPANTS

RESPITE

T1005 – 1 PARTICIPANT

T1005 UN – 2 PARTICIPANTS

T1005 UP – 3 PARTICIPANTS

T1005 UQ – 4 PARTICIPANTS

OVERNIGHT

T2027 U7 – 1 PARTICIPANT

T2027 UN U7 – 2 PARTICIPANTS