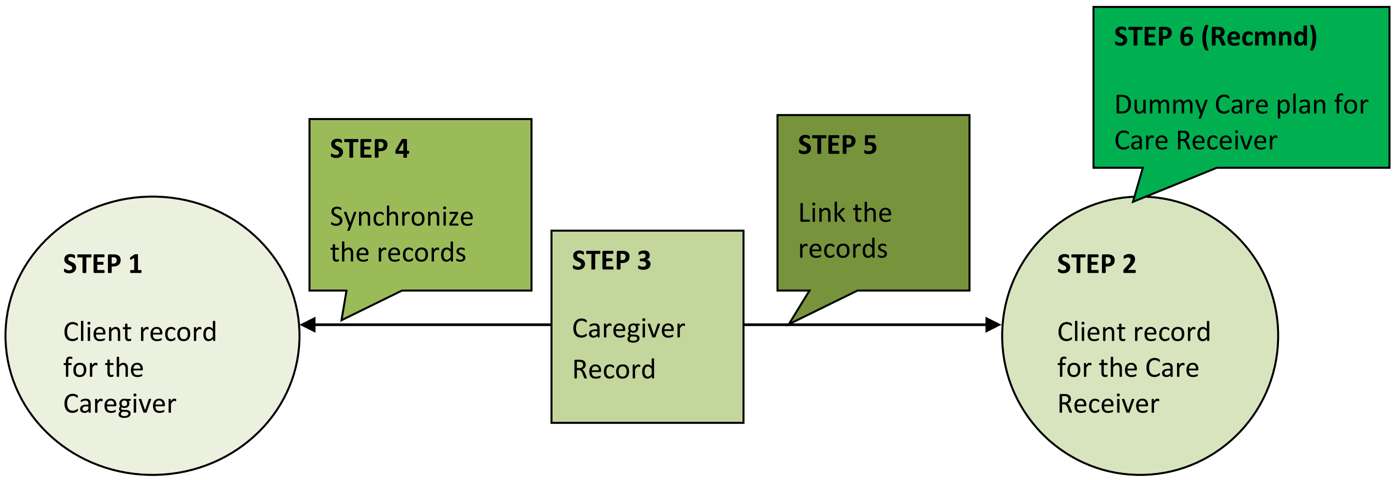
Caregivers & Care Receivers Quick Reference Guide

You can think of the process of entering Caregiver and Care Receiver/Recipient information in Q as a 5-step process with a 6th step that's highly recommended:

1. Find/Create a Client record for the caregiver, and enter an Employment Assessment
2. Find/Create a Client record for the care receiver, and enter an ADL/IADL Assessment
3. Find/Create a Caregiver record
4. Synchronize the Caregiver record with the caregiver's Client record
5. Link the Caregiver record to the care receiver
6. Create Dummy Care Plan for Care Receiver (*Highly Recommended)*



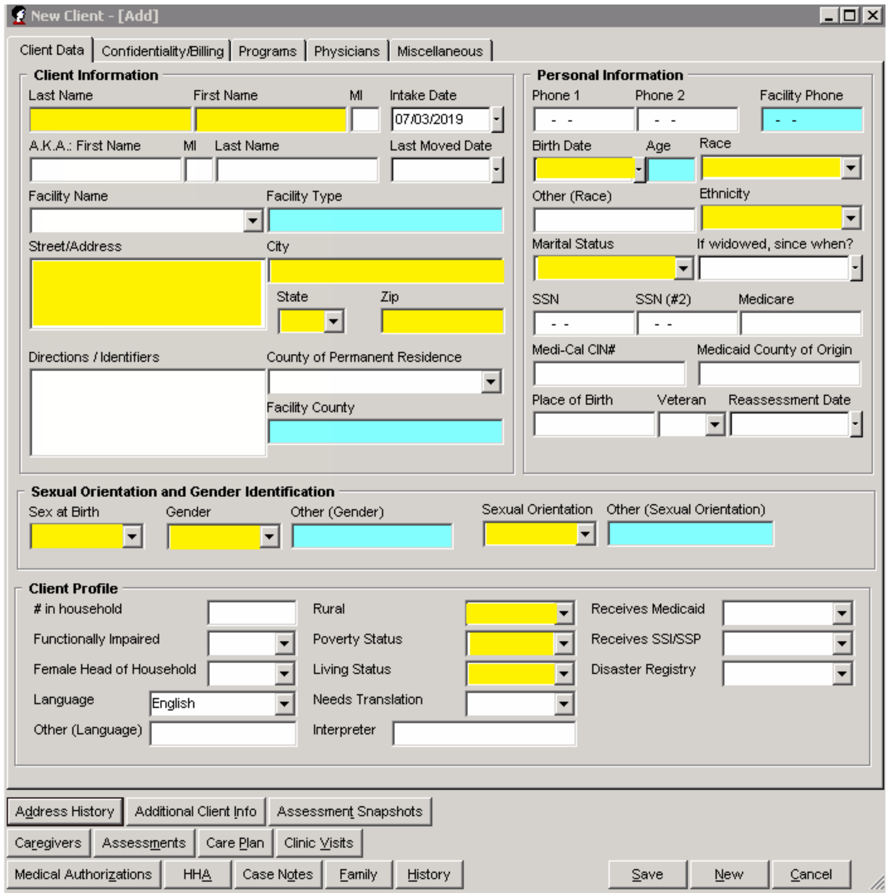
This guide will give you a quick reference for each step.

CareAccess

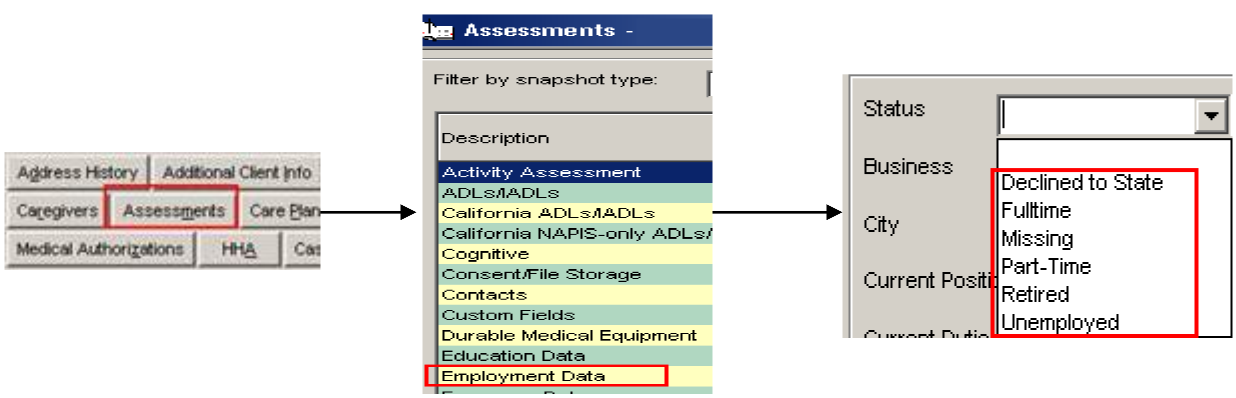
Step 1: Client Record for the Caregiver

Create a new Client record for the **Caregiver**. Enter information in the following fields highlighted in yellow:

- Name
- Address, City, State, and Zip
- Birth date
- Race
- Ethnicity
- Marital Status
- Sex at Birth
- Gender
- Sexual Orientation
- Rural
- Poverty Status
- Living Status



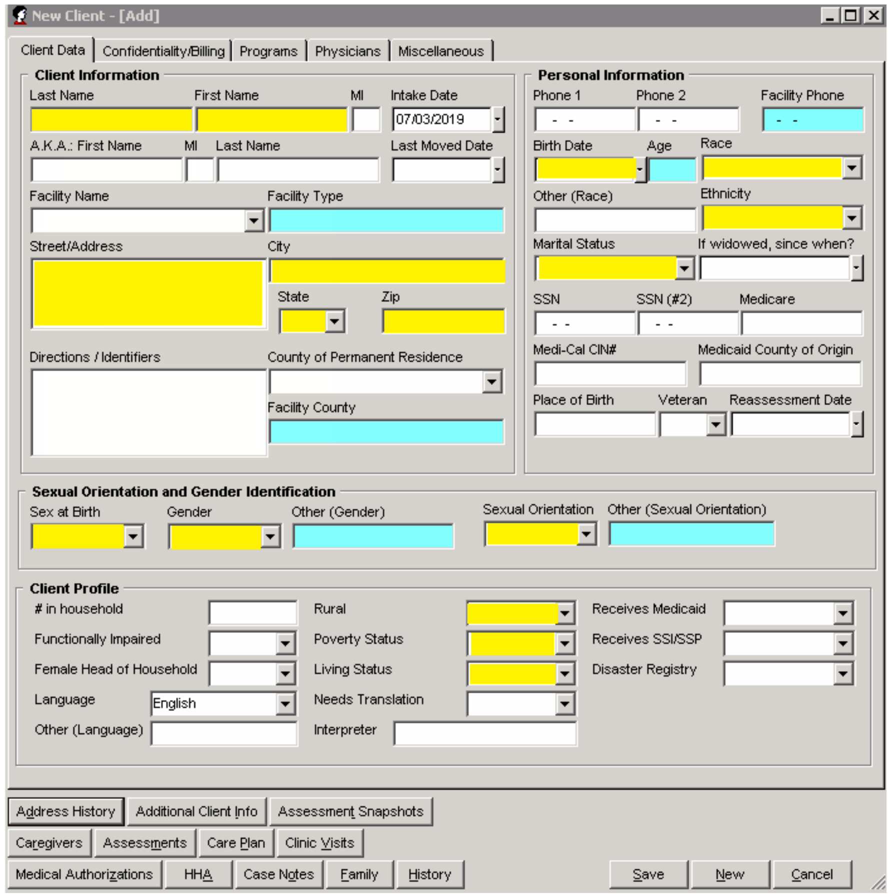
Caregivers require an Employment Assessment. Click the Assessments button in the lower left, double click on the Employment Data Assessment, enter a Status, then click Save:



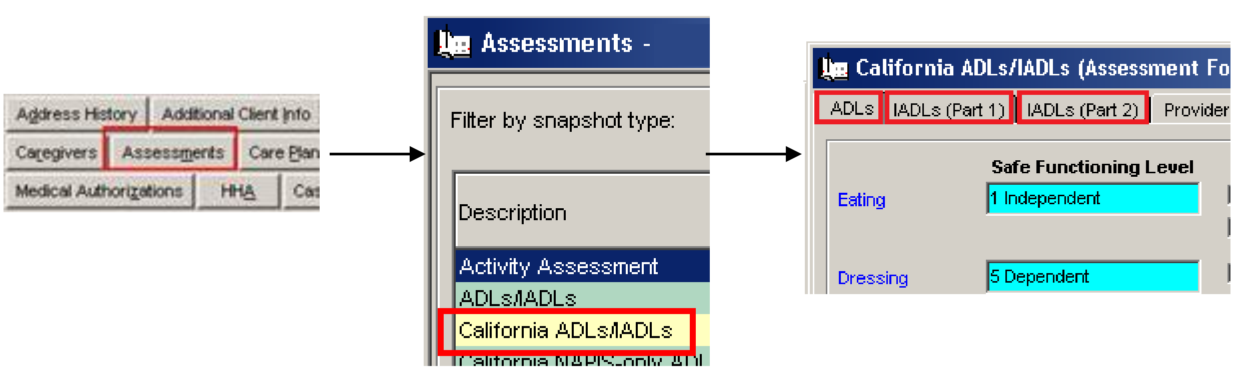
Step 2: Client Record for the Care Recipient

Create a new Client record for the **Care Recipient**. Enter information in the following fields highlighted in yellow:

- Name
- Address, City, State, and Zip
- Birth date
- Race
- Ethnicity
- Marital Status
- Sex at Birth
- Gender
- Sexual Orientation
- Rural
- Poverty Status
- Living Status



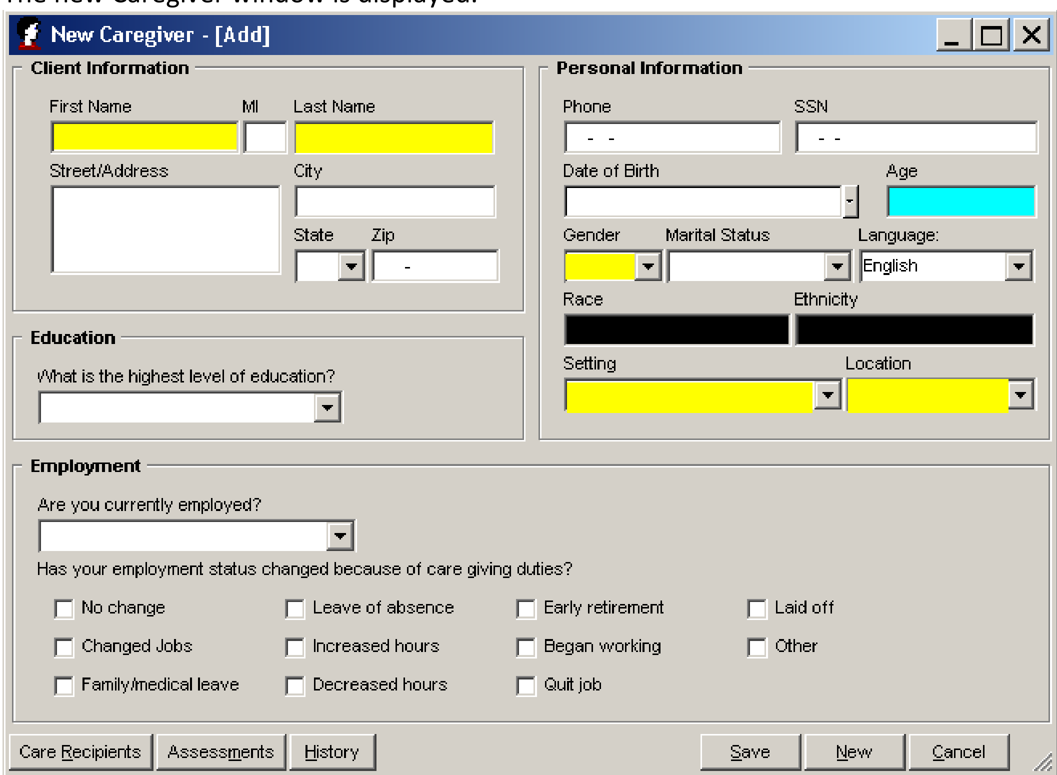
Care Recipients require an ADL/IADL Assessment. Click the Assessments button in the lower left, double click on California ADLs/IADLs, enter the Safe Functioning Levels on all tabs, then click Save:



Step 3: Caregiver Record

The Caregiver record is <u>completely different</u> from the **caregiver's *Client record***. You need to create both.

1. From the Launcher, open the Caregivers query.
2. Leave all the fields blank and click on the Query button. A list of all the current Caregivers is displayed.
3. Check the list for your new Caregiver to ensure they are not already in the list.
4. Assuming they are not a Caregiver, Click the New button.
   The new Caregiver window is displayed.

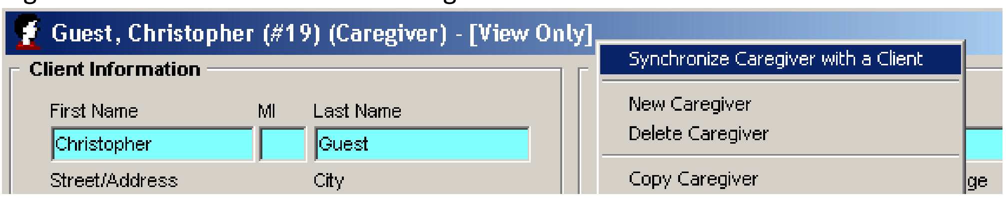


5. Fill in the First and Last name, gender, setting, and location. These are required fields. You don't have to fill in address, DOB, or other fields. You will synchronize this record with this caregiver's existing Client record.
6. Click the Save button to save the record, but do not close the record.

Step 4: Synchronize the Records

This step allows our Caregiver record to talk to our caregiver Client record.

1. Right-click on the title bar of the caregiver record.



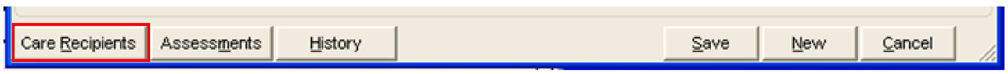
2. Click on the Synchronize Caregiver with a Client option.
3. Enter the name of the caregiver and press the Save button.
   The Caregiver's name will populate the Select Client field.
4. Click the Save button (a second time).

Notice that the DOB, age, gender, and other fields are now populated in the Caregiver record. Leave the Caregiver record open.

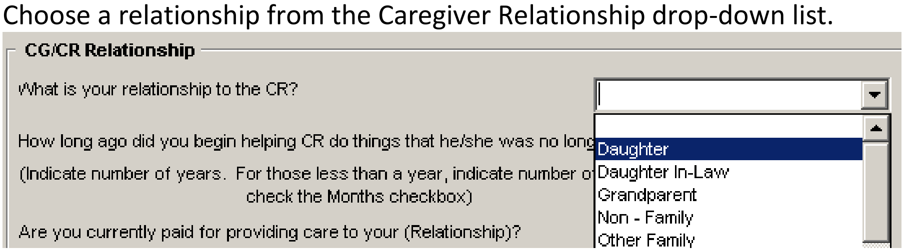
Step 5: Link the Caregiver and Care Receiver

The next step of the process is to link the Caregiver and Care Receiver in Q, using the Care Recipients button:

1. On the Caregiver record, click the Care Recipients button.



2. Click the New button.
   The New Caregiver/Care Receiver Relationship & Assessments dialog box appears.
3. Click on the Ellipse button next to the Care Recipient field to search the Client list.
4. Enter the first and last name of the Care Recipient and click the Query button.
5. Highlight the correct Client and click the Apply button.
6. Choose a relationship from the Caregiver Relationship drop-down list.



7. Click the Save button.

Now that you have completed the Caregiver Process you can generate the Care Plan for the FCSP Service(s) for the **Caregiver**.

Step 6: Dummy Care Plan for Care Receiver/Recipient (Highly Recommended)

It is highly recommended that you generate a “Dummy” Care Plan for the Care Recipient. This will allow you to manage your Care Recipients as a group and find missing demographic and assessment data easily and quickly. The Service is called ***FCSP-Care Recipient***.

See the How-To Guide called “Dummy Care Plans for Care Recipients” if you do not know how to create a dummy care plan.

Troubleshooting

If you find a Client has FCSP Service units (Title IIIE) but are missing some portion of the Caregiver Process, check the following:

- See if there is a Caregiver Record. This is the most common problem. The user forgot to add a Caregiver Record (Step 3).

- If there is a Caregiver Record, make sure it is synchronized to the correct Caregiver Client Record (Step 4).

- If there is a Caregiver Record and it is synchronized to that Caregiver's Client record, then the problem must be with the Association of the Caregiver Record with the Care Recipient (Step 5).

- Is the Care plan for a Title III E service in the Care Receiver Client Record? If so, you must delete/remove the care plan from the Care Receiver along with all service units and enter this information in the Caregiver's Client Record. (Dummy Care Recipient care plans are allowed, but no service units are ever entered.)

All problems must be one (or more) of those listed. Correcting the problem will allow the CARs submission to be accepted.