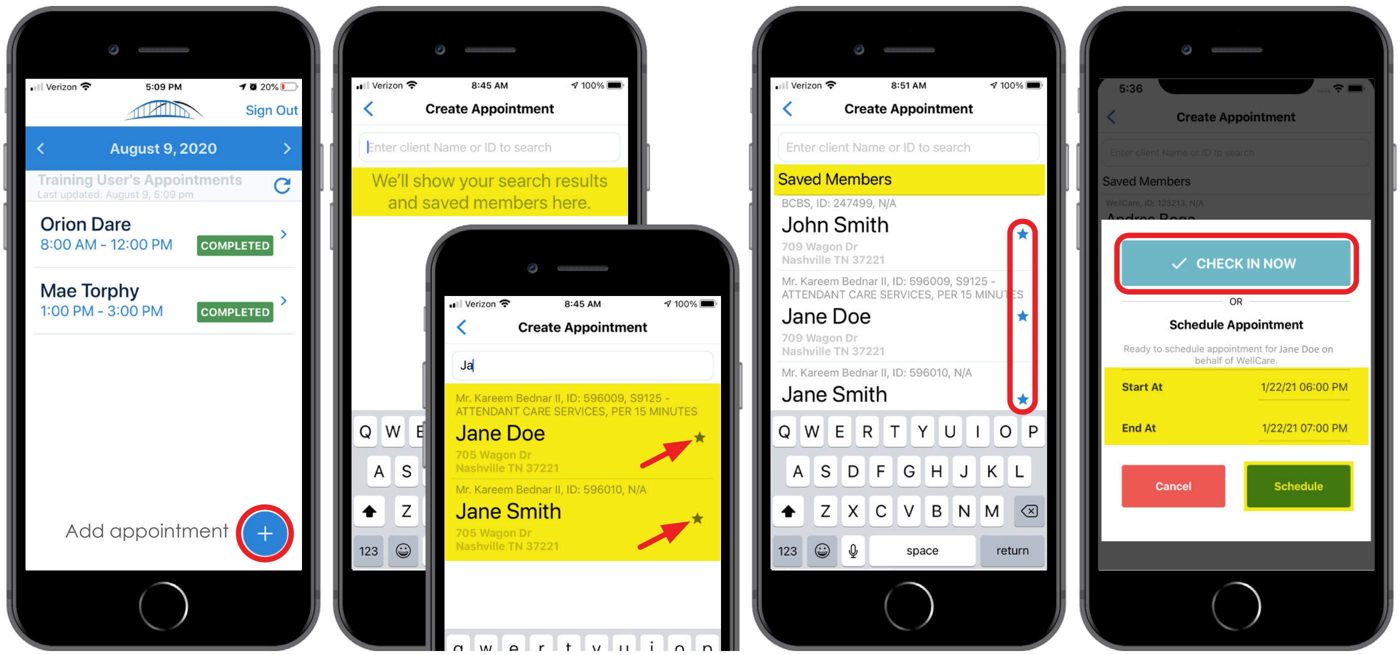
ICDAC MOBILE APPLICATION CHECK-IN AND CHECK-OUT GUIDE

CAREBRIDGE

OVERVIEW

The CareBridge mobile application is available to Caregivers and can be downloaded from the App Store or the Google Play store. If you need help with downloading the app, please refer to the Mobile Application Download and Login Guide in the CareBridge Resource Library. The instructions below will tell you how to Check-In and Check-Out of appointments within the mobile application.

Figure 1. Checking into an appointment



CREATING AND CHECKING INTO AN APPOINTMENT

After logging in, you will need to select the member you are serving.

1. Click on the **+** in the bottom corner of the screen (Figure 1) to open the Create Appointment screen. Enter the Member's name in the search area at the top. ***Please note:*** when you find the member, notice the **gray star** on the right. If you select this **star**, it will make this Member one of your "Saved Members". This makes it easier to find them quickly each time you Check-In and will also enable off-line Check-In for this Member. Saved Members have **blue stars**.
2. Click on the **Member's name**.
3. Click **CHECK IN NOW** for an immediate visit, or enter the **start and end times** for a future appointment.
4. If you clicked **CHECK IN NOW**, you will see the GPS screen with the map (Figure 2). Click **Next**. ***Please note:*** If this appointment was scheduled incorrectly, click on **Cancel Appointment**.
5. If you chose to create an appointment in the future, click **Schedule** to confirm that appointment. Now you will be able to see the Member on the list.
6. Now you can click **CHECK IN** and check into that appointment.
7. Once you have Checked-In, **STOP** using the app. Begin working the visit and assisting the member.

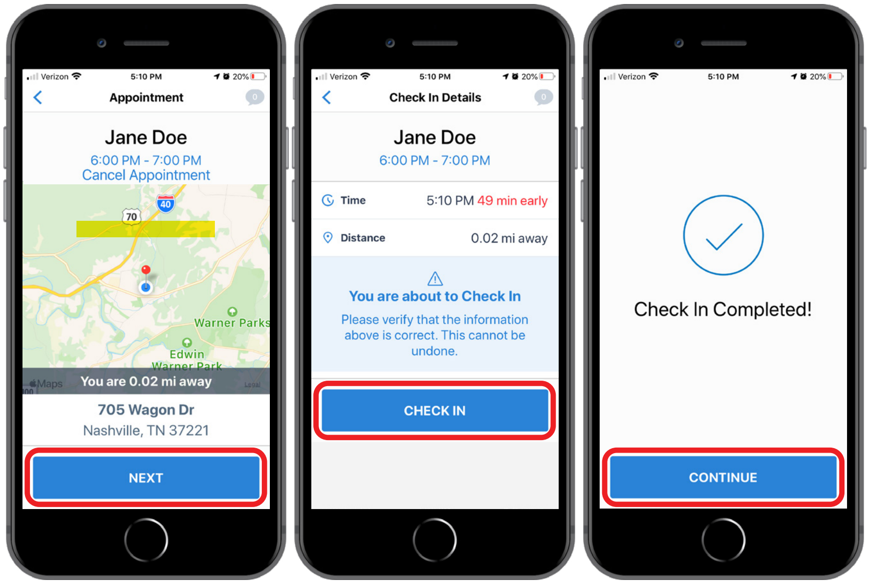


Figure 2. Checking into an appointment

Please note: It's possible that the GPS won't pinpoint your exact location, but show something within 1/10 of a mile of your location. This is normal and your visit will still be documented appropriately.

STILL NEED HELP?

If this guide does not answer your questions, please contact the CareBridge Support Center at **(844) 343-3653**.

The CareBridge Support is available Monday – Friday from 7 AM to 5 PM Central Standard Time.

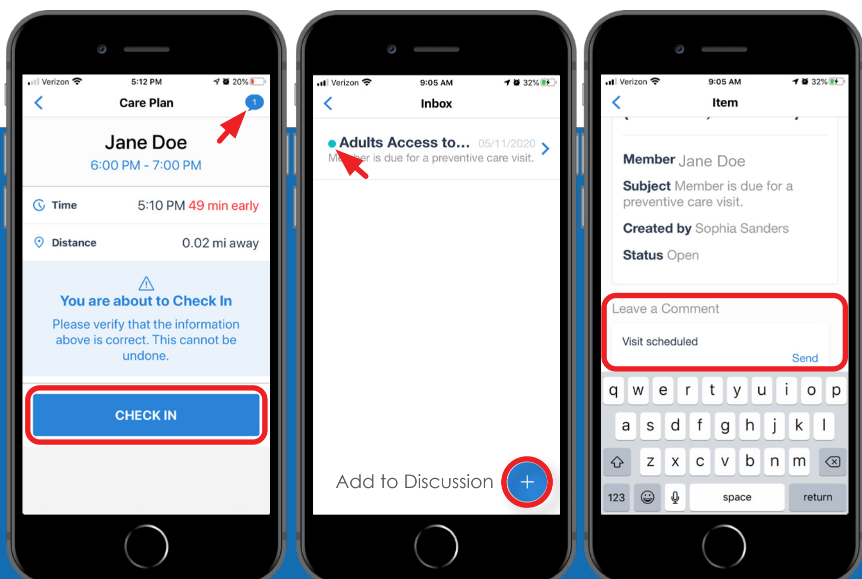


Figure 3. Discussions

DISCUSSIONS (Figure 3)

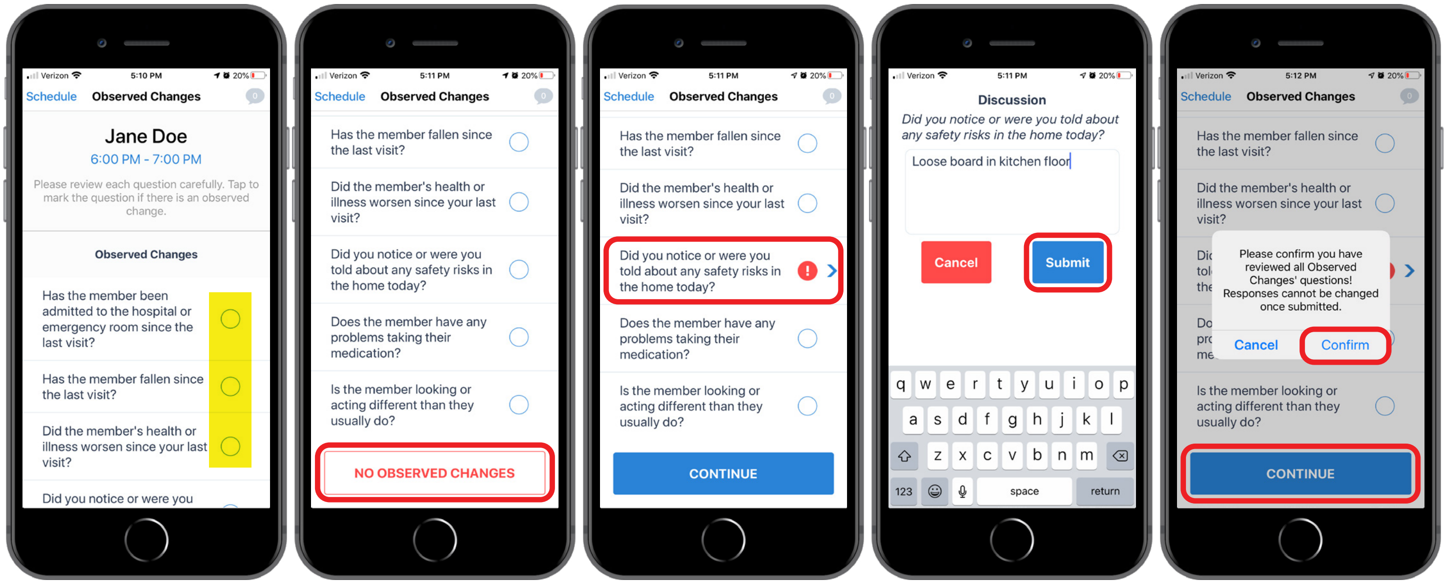
When checking into the appointment, there is a **speech bubble icon** in the top right. If there is a **number** there, it means there is a Discussion. Discussions are messages from the MCO about the Member. If it is **blue**, it means there is at least one unread comment. You can click on the **icon** to view Discussions. A **blue dot** shows which Discussions have unread comments. You may open and read comments in an existing Discussion by clicking on it.

OBSERVED CHANGES

At the end of the visit, go back to the app (it will pick up where you left off) and click on **CONTINUE** (Figure 4), the 'Observed Changes' questions list will appear. If you noticed any changes in the Member's health since the last visit or during this visit, you can document them in 'Observed Changes'.

*If there are **no changes**, just click the **NO OBSERVED CHANGES** button at the bottom of the list then **CONFIRM*** (Figure 4).

Figure 4. Observed Changes



If you did observe changes in the Member's health, you must select the question(s) that apply. Just click the **radio button (◯)** (Figure 5) for the appropriate question(s). The app will change the radio button to a **red circle with an exclamation point** and automatically take you to the next screen - where you can start a discussion with the MCO about your observations. After you have documented the change in that discussion, click **Submit** (Figure 5). The app will then present you with a list of the Observed Changes that you have and have not selected. After you have reviewed the list and determined it to be correct, click **CONTINUE**. You will then be asked to **Confirm** that you have reviewed all the Observed Changes questions (Figure 6). ***Please note*** that you must report any *urgent* issues to the MCO immediately, just as you would without EVV.

CARE PLAN

After Observed Changes, you will see the Member's 'Care Plan' (Figure 5). The Care Plan activities should be completed at the end of the visit before the Caregiver checks out. To record that you completed activities in the Care Plan, you

1. **Mark all Performed** ~OR~
2. Choose each task individually and mark them
    a. **Performed**,
    b. **Skipped**, ~OR~
    c. **Client (Member) Refused**
3. After recording the Care Plan activities, click **SUBMIT**.

You can always update any individual responses before clicking **SUBMIT**. You can also see the frequency for each task and track how many tasks have been completed. ***Please note:*** The **Provide additional comments >** button at the bottom of the screen (Figure 5) is where caregivers are required to capture the member response to the service provided.

Figure 5. Care Plan

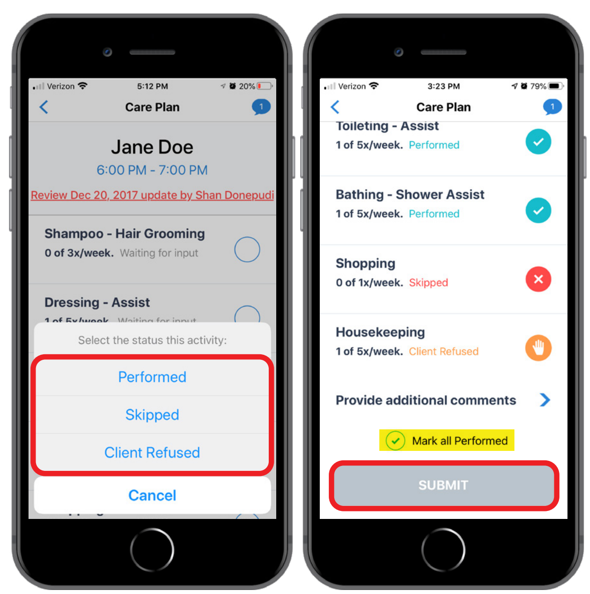
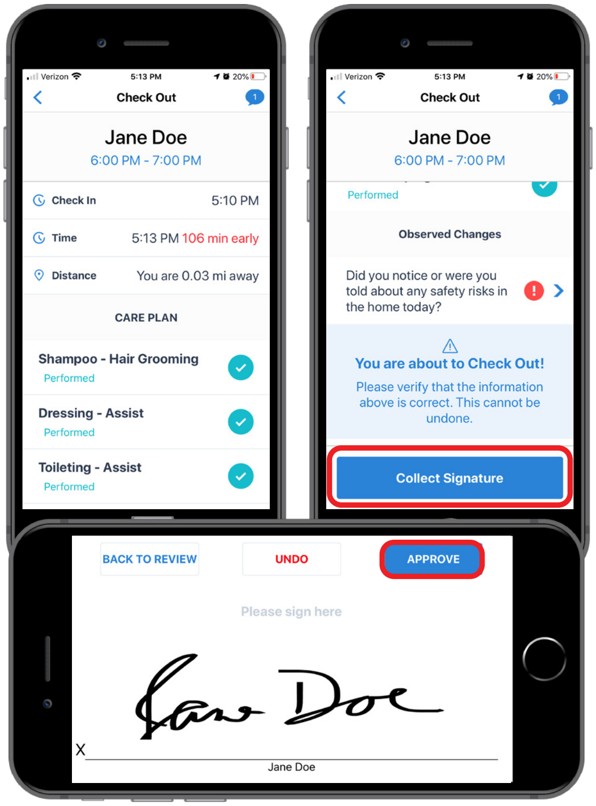


Figure 6. Checking-Out



CHECKING OUT OF A VISIT

After completing the Care Plan, you will see the Check-Out screen along with the completed Care Plan tasks and Observed Changes questions (Figure 6).

1. Review to make sure everything is right.
2. Click the **Collect Signature** button.
3. After the Member signs, click **APPROVE**.

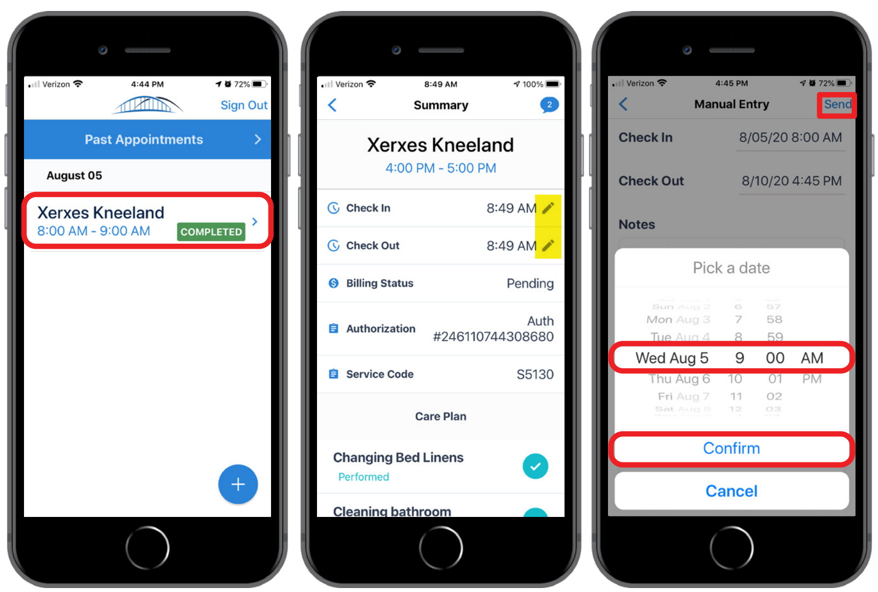
If a Member doesn't sign, you can click on the **APPROVE** button and select Member Refused as the reason for not collecting the signature. Now you have completed the visit and will return to the appointment screen.

MANUAL ENTRY

MANUAL ENTRIES FOR EXISTING APPOINTMENTS

A manual entry must be completed if you need to fix or add visit information. Manual entries can be used to fix or add dates of service, Check-In and Check-Out times. If you forgot to Check-In and Check-Out of a visit you will have to create the visit when you remember, then follow the steps below to make the needed corrections.

Figure 7. Manual Entry

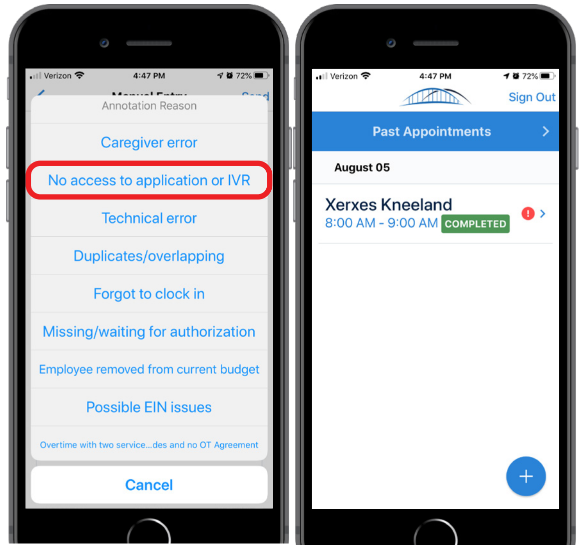


To complete a manual entry:

1. Find the visit you need to fix.
2. After you login to the mobile app, click the **< arrow** along the date bar at the top of the screen (Figure 7).
3. Now you will see a list of Past Appointments.
4. Click on the visit you need to correct.
5. Click the **pencil icon** to the right of the Check-In or Check-Out time.
6. Click on the date and time.
7. The **Pick a date** box will appear.
8. Select the correct date of service and/or fix the time.
9. Click **Confirm**.
10. If you want to leave a note, you can tap in the **Notes** box and write any details you feel are necessary.
11. Click **Send** at the top right corner of the screen.

12. Select the **reason** why the manual entry was needed The Manual Entry reason is required for visit to bill (Figure 8).
13. You have now completed your manual entry and can sign out of the Mobile App by clicking **Sign Out** at the top right corner of the screen.
14. ***Please note:*** after you have made your Manual Entry, the **Member** will need to go into the member portal and **attest** to the manually entered visit/manually adjusted visit.

Figure 8. Manual Entry Completed

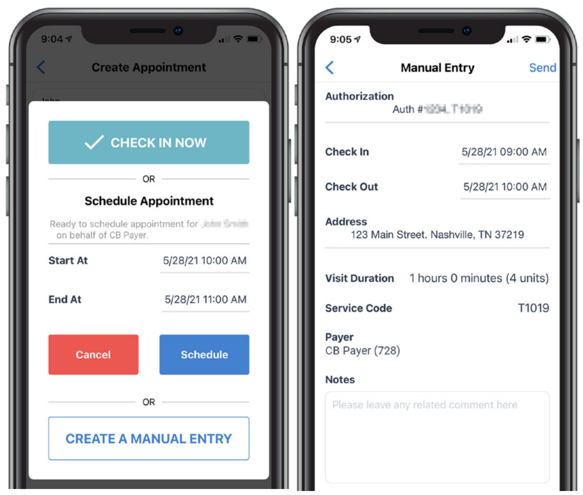


MANUAL ENTRIES FOR NEW APPOINTMENTS

When you are ready to document a service that has already occurred, simply select the **+ plus sign** in the bottom right-hand corner of the screen (Figure 9), search for and/or click on the Member you provided services to and select the **CREATE A MANUAL ENTRY** button at the bottom of the screen (Figure 10). You will then fill-in the details for the visit that has already occurred, but has not yet been entered (Figure 11).

REMEMBER: If you need to manually adjust a visit that has already been entered, **navigate to that visit and make the Manual Entry there**.

Figure 9. CREATE A (NEW) MANUAL ENTRY and fill-in the details

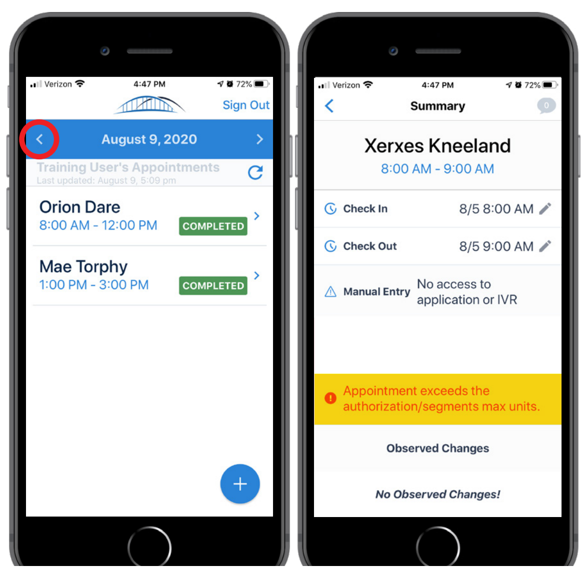


BILLING VISITS

Completed visits will automatically be billed from the Mobile App. Each time you login to the app, it is good practice to check and make sure there were no billing errors on your visits. To do this, after you login, click on the **< arrow** in the date bar at the top of the screen (Figure 10). This will take you to past appointments. If there are Pre-Billing Checks, you will see an **exclamation point in a red circle** on the right side of the screen in the completed visit. If you see this:

1. Click on the **visit**.
2. Read the Pre-Billing Check reason (Figure 10).
3. If you are able to correct the issue, **make the correction**.
4. If you are not able to correct the issues, **call the MCO**.

Figure 10. Billing visits



PRE-BILLING CHECK REASONS

- **Visit hours exceed max authorized units.**
  - To fix this you can change the times worked to come within the authorized units or call the MCO if an authorization change is needed.
- **Member is not eligible for services during visit time.**
  - Call the MCO to resolve.
- **Visit date is outside authorization dates.**
  - Call the MCO to resolve.

It is important to check for billing errors and correct them. **Billing errors that are not fixed may impact your paycheck**.