

# SETTING UP YOUR OFFICE



## PROVIDER PORTAL ACCESS PROCESS IN 8 EASY STEPS:

1. CareBridge creates Agency Admin (Super User) profile in EVV system
2. Agency Admin's username, Provider ID and login link is sent via automated email from [iaevv@carebridge.com](mailto:iaevv@carebridge.com)
3. Agency Admin adds additional employees
4. Agency Admin shares Provider ID and username setup instructions with newly added employees
5. Employees go to <https://ia.carebridgehealth.com>
6. Employees use the **Sign Up!** link to login for the first time
7. Temporary passcodes are sent to employees via text or email on file
8. Employees enter the passcodes and create their new passwords

## CAREBRIDGE PROVIDER PORTAL

The CareBridge Provider Portal is a web-based workflow tool that enables Provider office employees to view authorizations and claims, schedule and manage appointments, bill for completed visits, and view dashboards to ensure operational excellence.

### CREATE EMPLOYEES

On the Employees page is a tabular view of all employees that are in the Provider Portal (see Figure 1). It allows Agency Administrators to view, modify, and create new employee records. To create a new employee, select the **Create Employee** option in the top right-hand corner of the page.

Figure 1. Employees Page

EMPLOYEE	USERNAME	EMAIL	PHONE	ROLE	STATUS	OFFICE	LAST LOGIN	
<input type="checkbox"/>	Adam Schroeder	test	adam.schroeder@email.c...	5120641234	Super Enterprise	Inactive	Royalz Default, 1 South 1 East, 10East, 12Central	03/20/2020, 02:13 pm
<input type="checkbox"/>	Adele Othman	hello	cozy@mail@gmail.com		Super Enterprise	Active	Horizon Beyond 2nd, 12Central	
<input type="checkbox"/>	Alan Test	alan	huffman@email.com		Super Admin	Active	Main Office, Employee	04/23/2020, 01:35 pm

In addition to demographic information, the following fields are critical in setting up the new employee's profile:

- **Username:** This is a required field. We recommend the Username is their first initial and last name with no spaces. If there are multiple employees with the same combination, we recommend adding sequential numbers to the end, for example, 01, 02, 03, etc. The Provider Agency must communicate the username and Provider ID to the new employee in order for them to sign up for the Provider Portal or

Mobile Application, depending on the role of the employee, ex. - Office Staff vs Caregiver.

- **Email:** This email address is used for general communications and to receive a passcode that allows users to create their own password when they login for the first time.
- **MFA Phone Number:** For the user to receive multi-factor authentication codes used to sign into their mobile phone, this field will need to be completed. (This phone number will also be used to receive a passcode that allows users to create their password when they login for the first time.)
- **Worker Rate:** Worker Rate is used to accurately calculate Caregiver payroll reports.
- **Interactive Voice Response (IVR) Pin:** IVR is generally a backup option for Caregivers without smart devices. (If a user needs IVR access, a PIN will need to be created by the Agency Admin.)

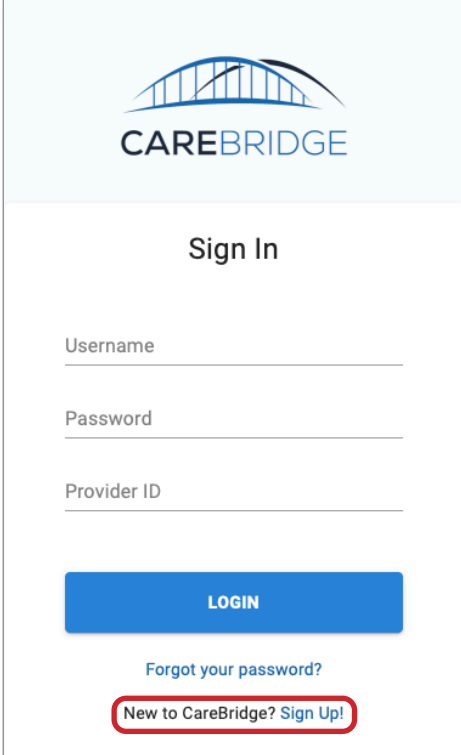
## LET'S GET STARTED

Once the Portal Administrator has populated the Provider Portal, Employees may begin logging in.

### LOGIN

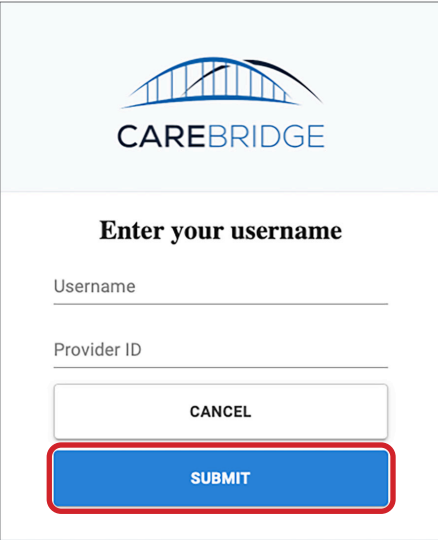
1. Navigate to:  
<https://ia.carebridgehealth.com/>
2. New employees can use the **Sign Up!** link to create a password and access the Provider Portal (Figure 2).

Figure 2.. Login as a New Employee



The screenshot shows the CareBridge login interface. At the top is the CareBridge logo. Below it is the heading "Sign In". There are three input fields: "Username", "Password", and "Provider ID". A blue "LOGIN" button is positioned below the fields. Below the button are two links: "Forgot your password?" and "New to CareBridge? Sign Up!". The "Sign Up!" link is highlighted with a red border.

Figure 3. Enter Employee Information



The screenshot shows the "Enter your username" page. It features the CareBridge logo at the top. Below the logo is the heading "Enter your username". There are two input fields: "Username" and "Provider ID". At the bottom, there are two buttons: a white "CANCEL" button and a blue "SUBMIT" button. The "SUBMIT" button is highlighted with a red border.

### ENTER EMPLOYEE INFORMATION

Enter the Username and Provider ID for the new employee (Figure 3), and select **Submit**. This step will generate the new employee's passcode and the portal will automatically send it to them via text or email

Figure 4. Enter Passcode and Create Password

### THE NEW EMPLOYEE CAN THEN ENTER THE PORTAL PASSCODE AND CREATE THEIR NEW PASSWORD

The new employee can then create a password that is at least 8-digits with a capital letter and a number. Confirm the password and **Submit** (Figure 4).

If the employee does not receive a passcode via text or email, it can be generated in the portal by a Provider Agency Admin employee.

### THE NEW EMPLOYEE CAN NOW LOGIN TO THE PROVIDER PORTAL AS NEW USER

The new office employee can then type in their username, password, and Provider ID and select **Login** (Figure 5).

Figure 5. Login as New User

**Please Note: Caregivers** - For information about logging-in to the CareBridge Mobile Application, please see the Mobile Application Download and Login document in the CareBridge Training Library.

## MODIFY EMPLOYEE INFORMATION

To modify the details of an employee, search for the employee using the employee Filters (Figure 6) and select **Employee Details** (Figure 7) to access their profile.

Figure 6. Employee Filters

EMPLOYEES Hello, Gwyneth! HOME HEALTH HILPERT GROUP

PERSONAL FILTER | PAYROLL | COMPLIANCE SCORE

**FILTERS**

Employee Name or ID: First/Last name, ID

Email: john@email.com

Phone Number: ###-###-####

Role: Select...

Status: Select...

Office: Select...

Figure 7. Employee Details

EMPLOYEES Hello, Gwyneth! HOME HEALTH HILPERT GROUP

PERSONAL FILTER | PAYROLL | COMPLIANCE SCORE

**FILTERS**

Sort by: Sort by

EMPLOYEE	USERNAME	EMAIL	PHONE	ROLE	STATUS	OFFICE	LAST LOGIN	
<input type="checkbox"/>	Adam Schroeder	test	adam.schroeder@email.c...	5120641234	Super Enterprise	Inactive	Bayada Default, 1South, 1East, 1West, 12Centraloos	03/30/2020, 02:13 pm
<input type="checkbox"/>	Adele Otherside	hello	cory.nanni@gmail.com		Super Enterprise	Active	Horizon Second 2nd, 12Centraloos	
<input type="checkbox"/>	Alan Test	alan	huffman@email.com		Super Admin	Active	Main Office, Employee Group 0	04/23/2020, 01:35 pm

## MODIFY EMPLOYEE DETAILS

To modify employee details, select the **pencil icon** next to the Employee name (Figure 8). The employee details fields will become editable. Select the **Save** button at the bottom of the employee details area to save your changes.

Figure 8. Modify Employee Details

EMPLOYEES > DETAIL > 96

Active

**Zack Zwaga**

Username: zack

Email: zztop@zoom.com

First Name: Zack

Last Name: Zwaga

Phone Number: 4166052234

MFA Phone Number:

CALENDAR: APR 26 - MAY 2, 2020

Sun 26	Mon 27	Tue 28