

MANAGING DISCUSSIONS IN THE PAYER PORTAL



The **Discussions** tool in the CareBridge Payer Portal allows MCO employees to communicate both internally within their organization and externally with provider agencies. The Discussions Page of the Payer Portal is designed to help MCO employees manage and prioritize inbound communication from providers and act on critical tasks.

DISCUSSIONS TYPES

There are four different types of Discussions:

1. **Observed Changes** allow Caregivers to communicate any changes in the member's condition to the MCO. Observed Changes are logged as part of the survey Caregivers complete during a visit. When Observed Changes are logged, a shared Discussion is automatically generated and sent to the Discussions page of both the Provider and MCO. You will want to monitor this regularly to ensure any urgent member issues are addressed.
2. **Address Requests** allow Providers to request a new or updated Member address from the MCO. When a provider modifies or adds an address in a member's details, a shared Discussion is automatically

generated and sent to the MCO's Discussions page. The MCO must approve the request before the new address is active. If the MCO has not configured the requests for auto-approval, an Accept/Reject button will be in the details card and one option must be selected. Once the request is approved, change the status to closed.

- 3. **Phone Requests** allow Providers to request a new or updated Member phone number from the MCO. When a provider modifies or adds a phone number in a member's details, a shared Discussion is automatically generated and sent to the MCO's Discussions page. The MCO must approve the request before the new phone number is active. If the MCO has not configured the requests for auto-approval, an Accept/Reject button will be in the details card and one option must be selected. Once the request is approved, change the status to closed.
- 4. **Messages** are used for general-purpose communication either internally between MCO employees or externally between MCO and provider agency employees.

To create a new Message:

- a. Click the **New Message** button below the list of Discussions, and the New Discussion dialog box will appear
- b. Complete the required fields
- c. Click **Send**

Note that an Internal Discussion can be shared with a provider agency at any time.

FILTERING DISCUSSIONS

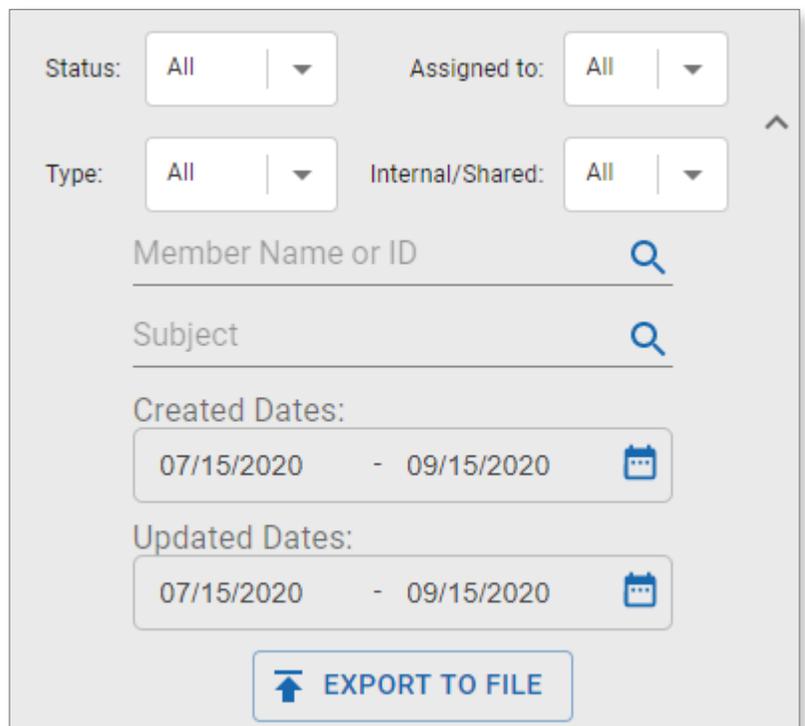
On the Discussions Page, you will see a list of all Discussions that is automatically ordered with the most recently active discussions first.

You can filter the Discussions list by:

- Status
- Assigned to
- Type
- Internal/Shared

To expand the filter window, click the **down arrow** to the right of the filters. This will allow you to search for a discussion by:

- Member name or ID
- Date range for when the discussions were created
- Date range for when the discussions were last updated



DISCUSSION ITEM DETAILS

Clicking on a Discussion will display the discussion's details. From the details tab, you can add information or update the Discussion.

The screenshot displays the 'Discussion Item Details' interface. On the left sidebar, there are filters for Status (All), Assigned to (All), Type (All), and Internal/Shared (All). Below these are search fields for Member Name or ID and Subject, and date pickers for Created Dates (07/15/2020 - 09/15/2020) and Updated Dates (07/15/2020 - 09/15/2020). An 'EXPORT TO FILE' button is also present. The main content area has three tabs: DETAILS (selected), APPOINTMENTS, and VISITS. Under the DETAILS tab, the member's name 'Corabella Verdey' is shown with a dropdown arrow, along with MemberID, Primary Phone, and Primary Address. A table lists discussion details: Created by (Gwyneth Mceuen), Type (Observed Changes), Subject (Unusual Behavior), and Description (Is the member looking or acting different than they usually do?). It also shows Created date, Last Updated Date, Status (Open), Assigned to (Select...), and Share with provider (CNG Mobile Home Health). Below this, there are tabs for INTERNAL (selected) and SHARED. The INTERNAL tab shows a 'Leave a comment' section with a text input field, an 'Attach file' button, and 'CANCEL' and 'SEND' buttons. A comment from 'Anthem TestUser' is visible, dated '6:17 PM, August 15, 2020', with the text 'This is an internal comment for test purposes.'

There are multiple actions that can be taken from the Discussion Details:

1. **Status:** To manage your Discussions and track their progress, you can update their Status. Statuses available are **Open**, **In Progress**, and **Closed**. It is important to update the status of a Discussion so all users can see the current progress.
2. **Assigned to:** To manage tasks across your organization, assign Discussions to an employee.
3. **Approve/Reject:** If manually responding to an address or phone change request, click the **Approve** or **Reject** button.
4. **Internal/Shared:** If you need to send the Discussion to the member's provider agency, select the provider from the **Share with Provider** drop-down.
5. **Comments:** At the bottom of the Discussion, you can leave comments and correspond. If the Discussion is internal, there will only be one tab: **Internal**. If the Discussion is shared, it will have an **Internal** tab and a **Shared** tab. Both tabs allow for separate communication channels within the discussion. Internal comments will not be visible to the provider agency. The **Shared** tab will only be available if the discussion has been shared with the member's provider agency.