

ICDAC INTERACTIVE VOICE RESPONSE (IVR) CREATE APPOINTMENT, CHECK-IN, AND CHECK-OUT GUIDE



OVERVIEW

If you are unable to use the CareBridge Mobile Application, you can use the Interactive Voice Response (IVR) option to create an appointment, Check-In and Check-Out of a visit. This method takes more time to complete and you will need to use the Member's home phone to call the IVR phone number. You will need three different codes that must be entered each time you call in using IVR. (Provider ID, IVR PIN, and IVR Password). You will create the 8-digit IVR Password the first time you use IVR. Please remember that you will need all three of these codes to use the IVR system.

The IVR system will walk you through a series of questions to complete the Appointment creation, Check-In, Observed Changes, Care Plan, and Check-Out processes.



STEP 1: CALL THE IVR PHONE NUMBER FROM MEMBER'S PHONE

Call the IVR phone number **(515) 489-4787**.

Select your language.

You will be prompted to enter your **Provider ID** followed by **pound (#)**. (This number is the same as your IVR PIN.)

STEP 2: ENTER YOUR PROVIDER ID FOLLOWED BY

You will then be prompted to enter your **IVR PIN** followed by **pound (#)**. (This number is the same as your Provider ID.)

STEP 3: ENTER YOUR IVR PIN FOLLOWED BY

*If it is your first time calling in, you will be prompted to enter your Sign-Up code _ which is a six-digit number sent to you via text or email - Followed by pound (#).

STEP 4: ENTER YOUR SIGN-UP CODE FOLLOWED BY

If it is your first time calling in, you will be prompted to create your 8-digit password followed by pound (#).

STEP 5: ENTER YOUR IVR PASSWORD FOLLOWED BY

After you enter your **8-digit Password** followed by **pound (#)**, you will then be prompted to confirm it (**press 1**) or change it (**press 2**). After you have confirmed your password you will hear a message that you do not have any scheduled visits, then you will hear prompts for scheduling an appointment.

STEP 6: CREATE AN APPOINTMENT AND CHECK-IN

1. **Press 1** to create a new appointment
2. Select the Member you are serving. If the Member has multiple authorizations, please select the authorization you need for your appointment.
3. You will then be presented with four options:
 - a. **Press 1** to enter schedule start time and end time (schedule an appointment for later). If you select this option, follow the prompts to enter the time of the appointment, use 12-hour format with leading zeros added accordingly. (Example: 2:30 should be entered as 0230.) Select 1 for A.M. or 2 for P.M.
 - b. **Press 2 to Check-In now** (start appointment immediately)
 - c. **Press 3** to return to the main menu
 - d. **Press 4** to end the call
4. If you scheduled an appointment for later, press the **# (pound)** key to confirm the appointment time
5. Now STOP using the app, **hang up**, and begin your service activities.

Note: if you get a message that the Member has no current authorizations, you will need to call the Member's MCO.

STEP 7: CHECK-OUT

At the end of your visit, call **(515) 489-4787** again and follow the prompts to Check-Out. First, you will need to answer the Care Plan and Observed Changes questions.

STEP 8: CARE PLAN QUESTIONS

Select the correct number for each response.

Press **1** to mark a task **COMPLETED**, **2** to mark a task as **SKIPPED**, or **3** to mark a task as **REFUSED**.

Press **4** to repeat the task.

STEP 9: OBSERVED CHANGES QUESTIONS

Observed Changes questions will be listed after you answer the Care Plan questions.

Select the correct number for each response. (**1** for Yes or **2** for No.) If you need to leave notes for an observed change, please follow the prompts and record your notes.

Follow the directions to Check-Out of the visit and **hang up** when complete.

MANUAL ENTRIES

If you realize you have made an error or did not Check-In or Check-Out at the right time, you can log in to IVR and make "Manual Entries" to correct or complete the visit information. To make a Manual Entry, visits must be completed first. If you forgot to Check-Out, you must call back and Check-Out of the visit before correcting it.

MAKING MANUAL ENTRIES IN IVR

1. Call **(515) 489-4787** from the Member's phone.
2. Select your language.
3. Enter your **Provider ID**, followed by **#**.
4. Enter your **IVR PIN**, Followed by **#**.
5. Select **1** to sign in to your account.
6. Enter your **IVR password**, followed by **#**.
7. Select the **Manual Entry** choice from the list of prompts. (If you have appointments to list, this number will most likely be **3**. If you have no appointments to list, this number will likely be **2**.)
8. Select the visit you need to correct. If it is from today, press **1**. If it is in the past, select Past Visits (**2**) and input the visit **[date]** and **[time]**.
9. Enter the corrected **start date** for the visit in the format of monthdayyear. (ex. January 28, 2021 = 01282021)
10. Enter the corrected **start time** for the visit in 12-hour format. Please add leading zeros accordingly. (ex. 9:00=0900)
11. Press **1** for A. M.. Press **2** for P. M..
12. Enter the corrected **end date** for the visit in the format of monthdayyear.
13. Enter the corrected **end time** for the visit in 12-hour format. Please add leading zeros accordingly.
14. Press **1** for A. M.. Press **2** for P. M..
15. Select the **reason** for Manual Entry by choosing the corresponding number. (Ex. "To select forgot to clock in, press 1.") To hear more options, press **star (*)**.
16. To complete your Manual Entry for the visit press **#**.
17. Visit edited successfully!
18. The system will then give you options to hear further details on your appointment (**1**), create a new appointment (**2**), complete a Manual entry (**3**), or exit the call by selecting star (*****).

STILL NEED HELP?

If this guide does not answer your questions, please contact the CareBridge Support Center via email at IAEVV@carebridgehealth.com or call **(844) 343-3653**.

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

MAKING MANUAL ENTRIES IN THE EVV PORTAL

If you forget to Check-In or Check-Out of a visit, that will need to be fixed before the visit can be billed for payment. If you realize you have made an error or did not Check-In or Check-Out at the right time, you will need to log in to the CareBridge EVV portal at <https://ia.carebridgehealth.com> and complete a manual entry to correct or complete the visit information.

If you forgot to Check-In and Check-Out, log into the CareBridge EVV portal and navigate to the Authorizations page. Locate the visit using the **FILTERS**, and follow these steps:

1. Select **Authorizations Details** by going to the **three dots menu** on the far right of the visit row.
2. Scroll to the bottom and click **MANUAL ENTRY**.

3. Select **Manual Visit Entry**.
4. Enter all the relevant information.
5. Choose a **Manual Reason Code** from the drop-down options.
 - This documents why you had to make the manual entry and is required.
6. Add notes to give greater context to the circumstances of the manual entry.
7. Make sure all fields are correct.
8. Click **SUBMIT** and the Manual Entry is complete.

If you forgot to Check-In, you will have to complete the Check-In and Check-Out process at the same time, then go into the CareBridge EVV portal to correct your Check-In time.

If you Checked-In but forgot to Check-Out, you can call IVR to enter the visit data then login to the CareBridge EVV portal and navigate to the Visits. Find the visit using the **FILTERS** and correct the Check-Out time by following these steps:

1. Select **Visit Details** by going to the **three dots menu** on the far right of the visit row.
2. Scroll to the bottom and click **MANUAL ENTRY**.
3. Select **Manual Visit Entry**.
4. Edit the details that need to be corrected.
5. Choose a **Manual Reason Code** from the drop-down options.
 - This documents why you had to make the manual entry and is required.
6. Add notes to give greater context to the circumstances of the manual entry.
7. Make sure all fields are correct.
8. Click **Submit** and the manual entry is complete.

BILLING VISITS

Visits that are completed through the IVR system are automatically billed and submitted to the MCOs weekly. Any visits that are not complete or do not pass pre-billing checks will not be paid. If you have been paid a wrong amount, you will need to call the Member's MCO to resolve the billing issue.