# SCHEDULING APPOINTMENTS IN THE PROVIDER PORTAL



The purpose of this document is to offer step-by-step instructions for scheduling an appointment.

Before an appointment can be scheduled, you must acknowledge receipt of the authorization from the MCO in the CareBridge Provider Portal. All unacknowledged authorizations are labeled "Received."

#### TO ACKNOWLEDGE AUTHORIZATIONS:

- 1. Navigate to the "Authorizations" page.
- 2. Click on the **Unacknowledged** tab.
  - a. To locate a specific authorization, use the **Filters** button at the top of the page.
- 3. Click on the **Received** status and select **Acknowledge**.
  - a. If you cannot service an authorization, you must contact the MCO directly.

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	Dashboard	PERIONAL RUTER LOW UTLIZATION HIGH UTLIZATION UNACKNONLEDGED UNASSIGNED DECLINED												
	Discussions	FILTERS												
	Authorizations Appointments	Sort ly Received Data  + Modelst Australia												
	Visits	MEMBER	RECEIVED DATE	START DATE	END DATE	UNITS	AUTH	SERVICE	MOD	SCHEDULED UTILIZATION %	PAYER	STATUS	EMPLOYEE	
	Billing	Kirsten Blondel	05/14/2020	01/09/2020	10/16/2020	1569	0326324165798	. 99125		0	Iowa Total Care	- Received	Unassigned   •	
	Members Employees	Felecia Ahlin	05/14/2020	12/22/2019	12/17/2020	1343	6704834587872	. \$100		0	Iowa Total Care	Received  Acknowledge	Unassigned   +	0
	Settings	Eveline Auchteriony	05/14/2020	11/26/2019		1433	1214650305919	. 89125		0		Decline Authorization	Unassigned   •	
		Tersina Quincey	05/14/2020	01/11/2020		1203	\$333801347762	. \$100		0	Iowa Total Care	v Received	Unassigned   •	
		Terencio Corona	05/14/2020	01/11/2020	11/22/2020	1711	4943402714469	. \$100		0	Iowa Total Care	v Received	Unassigned   +	
		Horace Kilcoyne	05/14/2020	02/05/2020	11/06/2020	1278	3800688940100	. \$100		0	Iowa Total Care	- Received	Unassigned   +	
		Ivett Phil	05/14/2020	01/20/2020	12/05/2020	1285	4630117551423	. 69125		0	Iowa Total Care	v Received	Unassigned   +	
		Reinwald Zwicker	05/14/2020	11/19/2019	09/26/2020	1815	5557694952003	. 99125		0	Iowa Total Care	v Received	Unassigned   +	
		Liza Chattelaine	05/14/2020	01/29/2020	12/14/2020	2311	3670900771394	89125		0	iowa Total Care	- Received	Unassigned	() Supp

b. You must respond to every authorization sent to your agency by an MCO.

Once you have acknowledged an authorization, you can schedule an appointment for that authorization.

From the Authorizations Page, locate the authorization and click the **calendar icon** to the right of the authorization.

**Note:** You can also schedule appointments from the member's details page and the appointment details page. For more information on these options, see the CareBridge Provider Portal Training Guide.



Once you are on the Schedule Appointment page, make sure the correct authorization is selected before you begin. When scheduling, you have two options: individual or recurring appointments. In both cases, select the start and end time, start and end location, and the Caregiver who will conduct the visit.

Т	ime Selection		Employee			
	Start Time	0	End Time	0	Select	-
	Overnight Appointment(s)					

July 24, 2020

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July 2020

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### CareBridge

## TO SCHEDULE INDIVIDUAL APPOINTMENTS:

1. Click the **calendar icon** in the "Individual Date Selection" card.

a. Select all the days you wish to schedule an appointment for the selected time and location.

- 2. On days when an appointment is already scheduled, there will be a blue dot above the date.
- 3. After you have selected all the appropriate dates, click **OK** and the appointments will appear in the "Dates Selected" card.
- Select Schedule Appointment at the bottom of the screen.
   a. Appointments are not scheduled until Schedule
   Appointment is clicked

## TO SCHEDULE RECURRING APPOINTMENTS:

- 1. Select the start date.
- 2. Select the number of times the appointment will repeat.
- 3. Select days, weeks, or months based on how often this pattern is to repeat.
- 4. Select the appropriate days of the week from the drop-down.
- 5. Select a specific number of visits or a future date for the recurring visits to end.
- 6. The appointments will automatically appear in the "Dates Selected" window.
  - a. Appointments are not scheduled until **Schedule Appointment** is clicked.

**Note:** You can add both individually scheduled dates as well as multiple rounds of recurring appointments into the "Dates Scheduled" window before clicking **Schedule Appointments**.

To view your scheduled appointments, navigate to the Member's Details page, and select the **Calendar** or **Appointments** tab.

**Remember:** If you try to schedule an appointment when the caregiver is not available (Blackout Dates are entered in the Employee Details page) you will get an error message stating "There was a conflict with the selected employee's current Blackout Dates, and the date(s) were automatically removed."

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+ SCHEDULE APPOINTMENT

Repeat Schedule × Start Date Repeat Every 3 week(s) -07/05/2020 m Repeat On Select.. -Monday End () Tuesday Wednesday Thursday Add Note Friday Saturday Sunday