ELECTRONIC VISIT VERIFICATION:
NO AUTHORIZATION WORKFLOW

Certain service codes will not have authorizations associated with them for scheduling appointments or completing visits. In theses instances, providers will be able to schedule appointments and complete visits for their members without an authorization.

To begin, a member profile must be created. When creating an individual member profile, you will need to have the member's information available before you start. On the *Members page* in the *CareBridge Provider Portal*, select the **+ ADD MEMBER** option in the top right-hand corner.

The following fields are critical in setting up the new member's profile:

- Member's name
- Date of Birth
- Member Medicaid ID
- Payer(s) Information
- Primary Address
- Primary Phone #

After clicking **+ ADD MEMBER**, you will be directed to the *New Member* form. Begin filling out the fields, starting with the member's name and date of birth.

*Figure 1. **Add Member** Option*

The member's **Medicaid ID** is a *required* field. This is to identify the Member's benefits.

Assigning Members to **Offices** and/or **Groups** is a way to organize Members by location, preferences, or any number of other relevant attributes.

To add payer information, click **ADD PAYER**. Enter the required information and click **save**.

Figure 2. *Add Payer* option
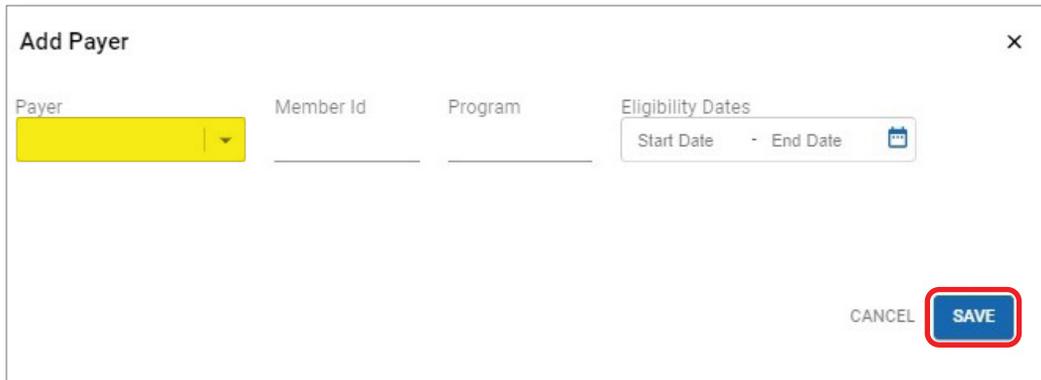
Figure 3. Add *Primary Address*

Once the payer info has been entered, the EVV Information section can be filled out. Click the "**+**" symbol to enter the *Member's Primary Address*, select the *Address Type*, and select a *payer* under *Share with Payer. Click* **save** when the information has been filled out(*Figure 3*). If the Member is routinely cared for at multiple addresses, the user will need to enter these addresses. This can be done in the *Secondary Address(es)* field by clicking on the **+** symbol.

Just like the address, the user now needs to enter the member's *primary phone number* and a *secondary phone number(s)* can be entered if needed. Select the "**+**" symbol to enter the *phone number*, select the *Phone Type*, and select a payer under *Share with Payer. Click* **save** when the information has been filled out (*Figure 4*).
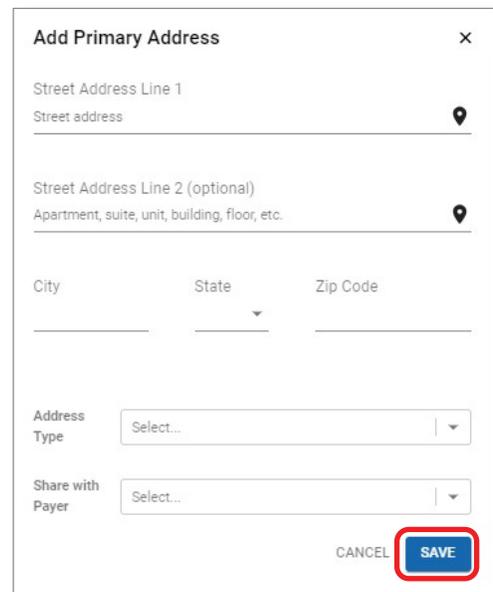
Figure 4. Add *Phone Number*
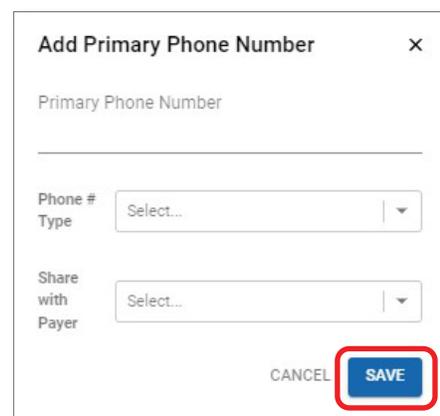
After completing the member profile, scroll down and *click* **save** at the bottom of the page.

*Figure 5. **Schedule Appointment** detail screen*
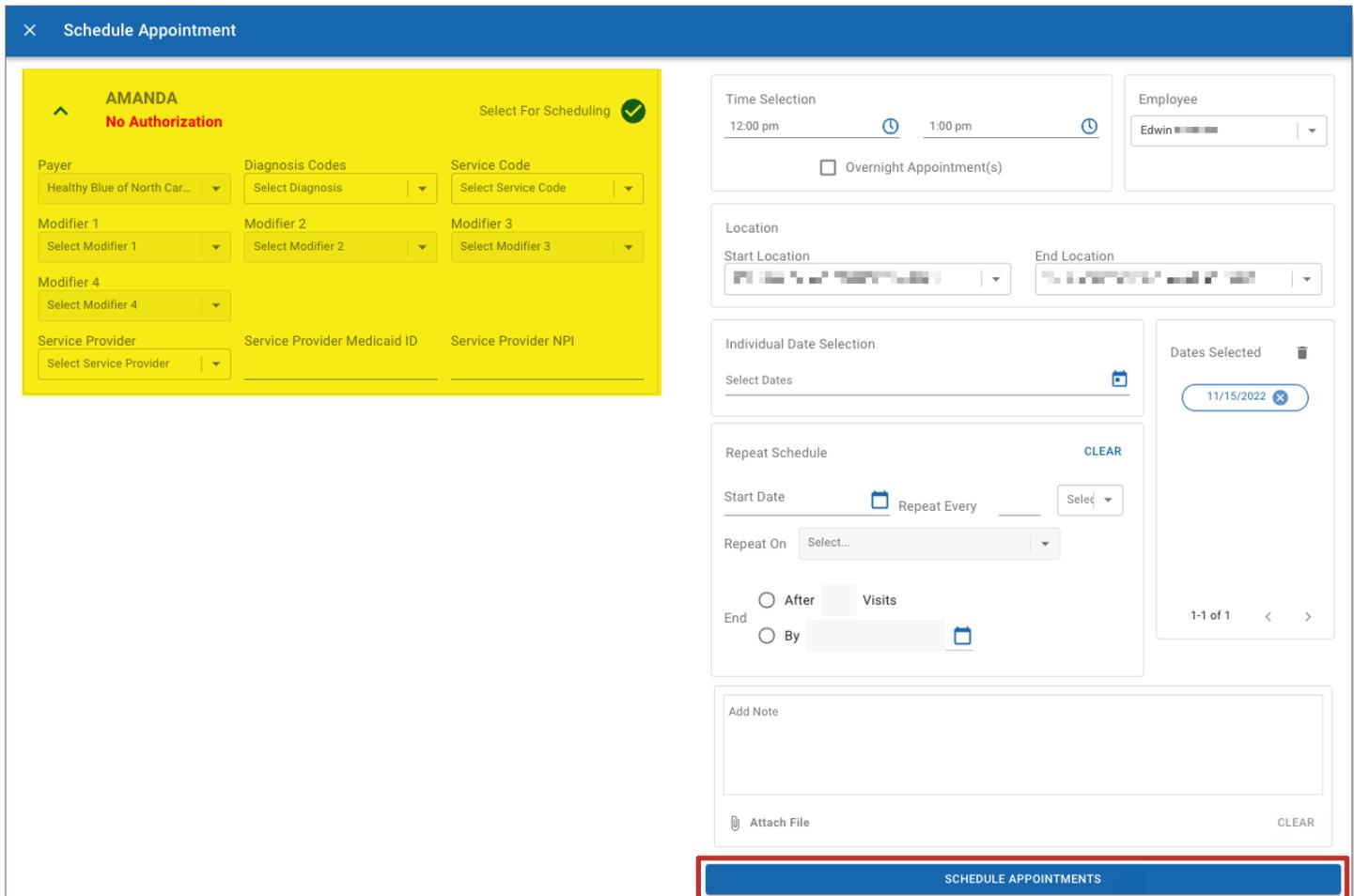
Providers can choose the **"No Authorization"** option in the **Schedule Appointment** screen, then select the *diagnosis code, service code, modifiers (if any), and the service provider* (*Figure 5*). The *service provider Medicaid ID* and *NPI* will automatically populate once the provider has been selected. Once the **No Authorization details** have been completed, the selections will apply to the single scheduled appointment, or to all appointments if a repeat schedule is selected. The schedule appointments screen can be accessed by clicking the **schedule appointment button** on the authorizations page.

Providers can also make changes to the **No Authorization** selections on already scheduled appointments (*Figures* 6 & 7).

Click the **pencil icon** under the **billing box** on the **Appointment Details page** to edit the selections (*Figure* 6).

Once the changes have been made, simply click **save**. Please note this will only change the appointment that is being viewed. If multiple appointments need to be edited, this process will need to be repeated for each appointment (*Figure 7*).

Figure 6. **Billing** *Box*
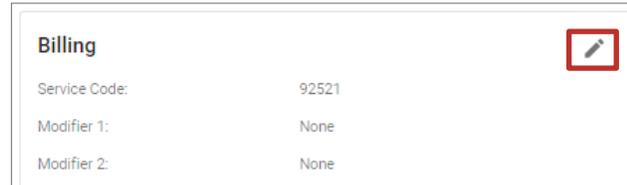
Figure 7. Edit **Billing** *Details*
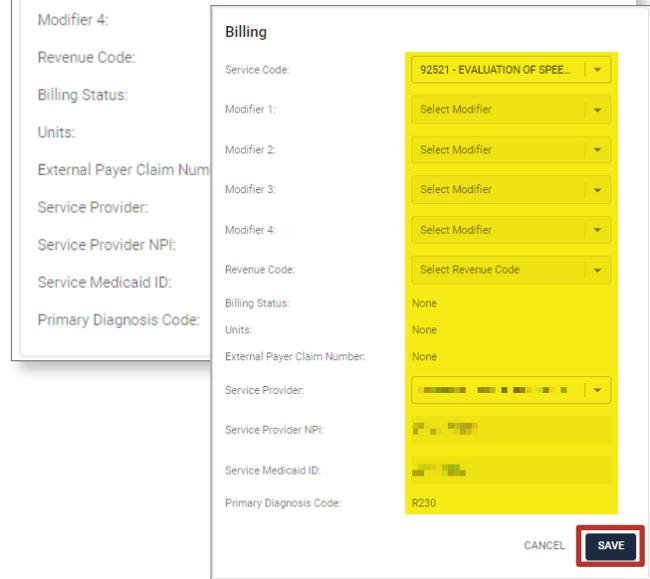
MANUAL ENTRY

To create a direct manual entry in the portal without an authorization, select the manual entry button in the Visits page. In the manual entry screen, select the "No Authorization" option in the Authorization drop down menu.