



CAREBRIDGE

# TRAINING GUIDE

## CareBridge Payer Portal Electronic Visit Verification (EVV)



# TABLE OF CONTENTS

## CONTENTS

- INTRODUCTION ..... 4
  - OVERVIEW ..... 4
  - WHAT IS ELECTRONIC VISIT VERIFICATION (EVV)? ..... 4
  - WHAT IS CAREBRIDGE? ..... 4
- PLATFORM OVERVIEW AND SETUP ..... 5
  - OVERVIEW ..... 5
    - SIGNING IN ..... 5
    - SIGNING IN FOR THE FIRST TIME ..... 5
    - RESETTING YOUR PASSWORD ..... 6
- NAVIGATION ..... 6
- EMPLOYEES PAGE ..... 7
- FILE IMPORT AND EXPORTING REPORTS ..... 7
- PROVIDERS PAGE ..... 8
- MEMBERS PAGE ..... 9
  - VIEW MEMBERS ..... 9
  - VIEW MEMBER DETAILS ..... 9
  - MODIFY MEMBER DETAILS ..... 10
  - MEMBER REPORTS ..... 11
- ELECTRONIC VISIT VERIFICATION (EVV) WORKFLOWS ..... 12
  - OVERVIEW ..... 12
  - AUTHORIZATIONS PAGE ..... 12
    - PROVIDER WORKFLOW ..... 12
    - VIEW AUTHORIZATIONS ..... 13
    - AUTHORIZATION STATUSES ..... 13
    - AUTHORIZATION DETAILS ..... 13
    - AUTHORIZATIONS REPORTS ..... 14

# TABLE OF CONTENTS

- APPOINTMENTS PAGE ..... 14
  - PROVIDER WORKFLOW ..... 15
  - APPOINTMENT DETAILS ..... 15
  - APPOINTMENT REPORTS ..... 16
- EVV IN ACTION ..... 16
- VISITS PAGE ..... 17
  - VISIT DETAILS ..... 17
  - VISITS REPORTS ..... 18
- PRE-BILLING CHECK ..... 19
- BILLING PAGE ..... 19
  - CLAIMS HISTORY ..... 20
  - BILLING REPORTS ..... 20
  - BILLING STATUS ..... 21
- COMMUNICATIONS ..... 22
  - DISCUSSIONS ..... 22
    - DISCUSSIONS NAVIGATION ..... 22
    - DISCUSSION TYPES ..... 23
    - DISCUSSION ITEM DETAILS ..... 23
- DASHBOARD & REPORTING ..... 25
  - DASHBOARD ..... 25
  - SETTINGS PAGE ..... 26
    - GROUPS ..... 26
    - IMPORTS ..... 28

## INTRODUCTION

### OVERVIEW

This Training Guide is intended to help MCO employees understand how to best utilize the CareBridge Payer Platform to manage provider agencies and the members they serve on a day-to-day basis. If at any point you have questions, please reach out to your MCO's CareBridge Client Relations Manager.

### WHAT IS ELECTRONIC VISIT VERIFICATION (EVV)?

EVV uses technology to record the times and locations that Caregivers or Direct Service Workers (DSRs) Check-In and Check-Out of an Appointment. EVV has proven to accurately log Caregiver's/ DSW's times and minimize or eliminate inappropriate claims.

Under the federal 21st Century Cures Act, EVV is required to be used by Providers, Caregivers, Attendants, and Homemakers that deliver personal care, attendant care, and homemaker services (in 15-minute increments or daily) to Medicaid beneficiaries. The 21st Century Cures Act requires that EVV systems must collect and verify the following 7 items:

- Type of service performed
- Beneficiary receiving the service
- Caregiver providing the service
- Date of the service
- Location of the service
- Time the service begins
- Time the service ends

### WHAT IS CAREBRIDGE?

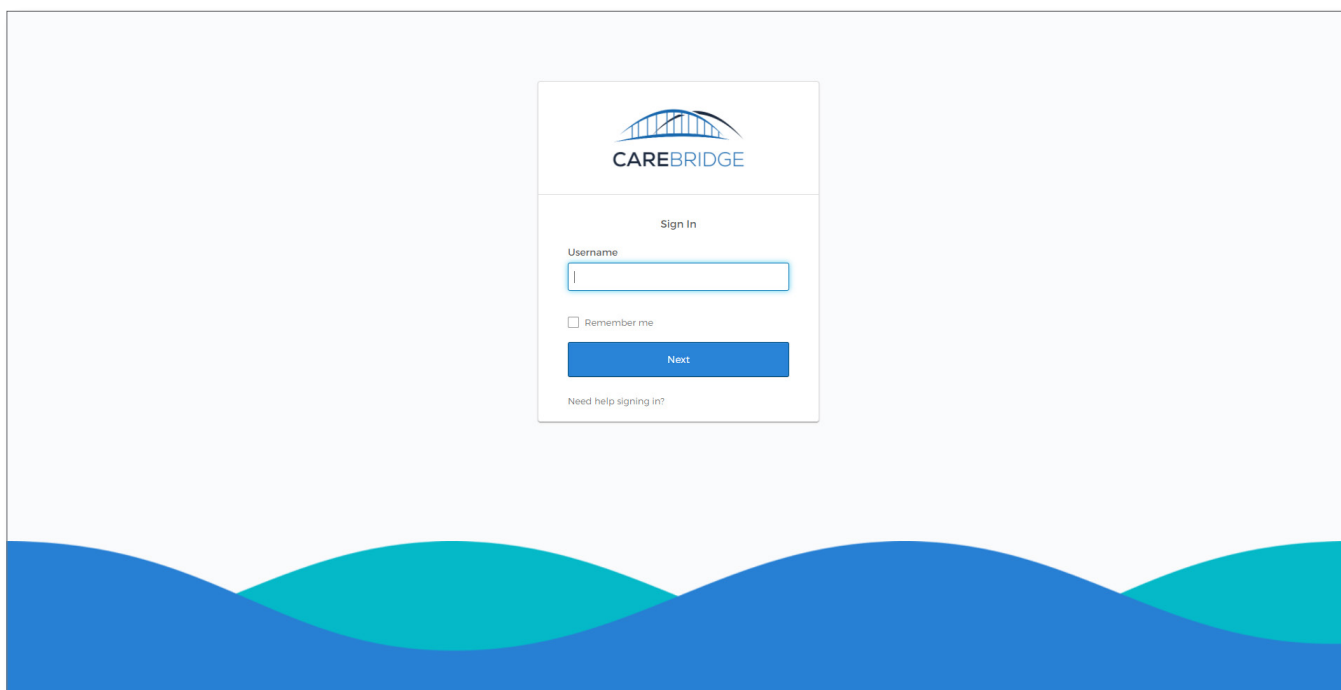
CareBridge is an EVV and EVV aggregation company formed to improve the processes that enable caring for people (Members) who receive Long-Term Services and Supports (LTSS). We offer LTSS solutions including an Electronic Visit Verification Platform that can be utilized via a mobile phone, tablet, landline, and web-based portal to record the delivery of service and facilitate day-to-day management of Members' appointments and providers' claims.

CareBridge also supports a wide array of EVV aggregation solutions, allowing provider agencies to continue using their current 3rd-party EVV provider while still fulfilling the requirement to send data back to health plans or the state.

## PLATFORM OVERVIEW AND SETUP

### OVERVIEW

The CareBridge Payer Portal is a conduit between your organization, provider agencies, and caregivers. In an intuitive and user-friendly platform, it brings together all the relevant information for members, authorizations, providers, visits, and claims to effectively manage providers and ensure members receive the highest quality care.



The following sections will provide an overview of the basic features and functions of the CareBridge Payer Portal.

### SIGNING IN

1. Navigate to <https://njmco.carebridgehealth.com>
2. Enter your username and click **Next**
3. Enter your password and click **Log In**

### SIGNING IN FOR THE FIRST TIME

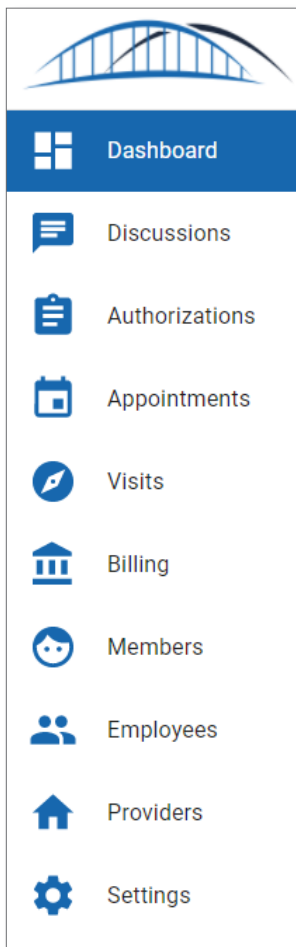
1. Your organizations administrative user will create the profile and a temporary password for a new user and communicate both to the new user
2. The new users will navigate to <https://njmco.carebridgehealth.com>
3. Enter their username and click **Next**
4. Enter their temporary password and click **Log In**
5. They will be prompted to create a permanent password
6. After creating a permanent password, their account will be active

## RESETTING YOUR PASSWORD

If you forget or need to reset your password, navigate to the log in page. Immediately below the large blue **Next** button, click **Need help signing in?** then **Forgot password?**. Enter your username or email address, click **Reset via Email**, and you will receive an email with instructions to finish resetting your password.

## NAVIGATION

The CareBridge Payer Portal is organized into 10 main pages located on the left navigation pane. The seven primary EVV pages display data in a table format with the **Personal Filter** as the default tab you first see. The **Personal Filter** is an unfiltered view of the page's entire data table. Most pages have additional tabs that are pre-filtered lists to help you quickly view important subsets of each page's table. The pages will be discussed in more detail throughout this User Manual.



- **Dashboard:** Allows Employees to view key metrics and graphs in clear visualizations to support operational efficiency
- **Discussions:** Enables communication both internally within your organization and externally with providers and caregivers
- **Authorizations:** Displays the details and critical information for all authorizations, including status and scheduled utilization percentage
- **Appointments:** Displays upcoming scheduled appointments and allows employees to view late and missed appointments
- **Visits:** Shows completed visits and important details such as whether it was late or missed, flags indicating problems, and if the visit is EVV compliant
- **Billing:** Displays all visits that have been exported for claims by providers and the claims' billing statuses
- **Members:** Displays Members and their critical information
- **Employees:** Lists your organization's employees and allows you to create and manage employee profiles
- **Providers:** Lists all providers and their relevant information
- **Settings:** Allows Employees to 1) create groups that you can assign providers and members to for more efficient business management and 2) view and manage imported authorization, member, and provider data files

## EMPLOYEES PAGE

The Employees Page provides a table of all your organization's employees and their profile information. From the Employees Page, you can view, modify, and create new employee profiles.

EMPLOYEES

Hello, Anthem!  
Amerigroup Iowa (1 - CDT)

PERSONAL FILTER

FILTERS

Sort by  
Employee

+ CREATE EMPLOYEE

EMPLOYEE	USERNAME	EMAIL	PHONE	ROLE	STATUS
Nate Hines	nate.hines@carebridgehealth.com	nate.hines@carebrid...		Payer	Active
Totally Kyle	totallykyle	sam@sam.com		Payer	Active
first_name last_name	username	test@email.com	phone		Active
lizard lazarta	test			Payer	Active

Employee Details

Active

**Totally Kyle**

Username  
totallykyle

Email  
sam@sam.com

First Name  
Totally

Last Name  
Kyle

Phone Number (optional)

Role  
Payer

SAVE

To view or edit details in an employee's profile, click the **three dots** on the far right of the row and select **Employee Details**. To enable editing in the Employee Details page, click the **pencil icon** next to their name. When finished, click **Save**.

To add an employee to your organization's CareBridge account, navigate to the Employees Page and click **Create Employee** in the top right. The administrative user will manually create the employee's profile, including their username and a temporary password and must communicate their username and temporary password to the new user.

When the new user logs in for the first time, they will be prompted to create a permanent password. After that process is complete, their profile will be active, and they can perform all the functions in the Payer Portal.

## FILE IMPORT AND EXPORTING REPORTS

CareBridge receives 3 files from health plans through automatic secure file transfer protocol (SFTP), a Member file, an Authorizations file and a Provider file. The files for Members and Authorizations update daily, and the Provider file updates weekly. Health plan employees can view the import history, including any errors and warnings, in the CareBridge portal by navigating to the Settings Page and selecting the **Imports** tab. Note the key details: Imported date and time, file type, status, # of records, warnings, and errors. To view the individual files and any warnings or errors, click the **three dots** on the right of the table and select **Import Details**.

You can also export data tables from the CareBridge portal as a comma separated value file. When viewing data in the portal, use **Filters** to create the table you need and click **Export to File** in the bottom left of the page. You will be prompted to choose the download location on your computer.

EXPORT TO FILE

## PROVIDERS PAGE

The Providers Page is unique to the Payer Portal and is a table of all the providers in your network. Provider files are automatically update weekly through SFTP. Click **Filters** to find specific providers or use any combination of variables to create custom lists.

The screenshot shows the Providers Page interface. On the left is a navigation sidebar with options like Dashboard, Discussions, Authorizations, Appointments, Visits, Billing, Members, Employees, Providers (selected), and Settings. The main content area has a 'PROVIDERS' header and a 'PERSONAL FILTER' section. A 'FILTERS' button is highlighted. Below it is a 'Sort by' dropdown set to 'Provider'. An 'ASSIGN TO' button is highlighted in the top right. The table below has the following data:

PROVIDER	EMAIL	ADDRESS	PHONE	NPI	CLAIM SUBMITTER ID	TAX ID	STATUS
<input type="checkbox"/> CNG HEALTH BASHIRIAN LLC		620 ROWLAND HILL CHATTANOOGA TN 37405	423-569-1911	3812584192		93-2031512	Active
<input type="checkbox"/> CNG HEALTH DECKOW, HERMISTON AND FRAMI		8776 MAPLE WOOD PARK KNOXVILLE TN 37919	865-656-9574	2642729249		97-1941148	Active
<input type="checkbox"/> CNG HEALTH KOHLER-RICE		3 FAIRFIELD ROAD NASHVILLE TN 37235	615-740-3892	9510796619		48-5781690	Active
<input type="checkbox"/> CNG HEALTH KONOPELSKI LLC		5 AMOTH CROSSING NASHVILLE TN 37215	615-676-1726	4504030295		44-7768813	Active
<input type="checkbox"/> CNG HEALTH LEUSCHKE-FEEST		5 INTERNATIONAL HILL KNOXVILLE TN 37939	865-442-1256	1914433627		93-7300959	Active
<input type="checkbox"/> CNG HEALTH RUNOLFSSON-KEMMER		29112 GRASSKAMP CROSSING NASHVILLE TN 37235	615-939-2288	5215333956		08-3020057	Active
<input type="checkbox"/> CNG HEALTH SPINKA, REICHEL AND ROWE		92967 CODY AVENUE KNOXVILLE TN 37931	865-593-7519	1713613569		36-1736783	Active
<input type="checkbox"/> CNG Mobile Health		91 WARNER ALLEY NASHVILLE TN 37228	615-473-3416	9506916091		04-3087656	Active

To help manage providers, you can assign them to groups. To assign one or many providers to a group, click the **check box** to the left of their name, click the **Assign To** button in the top right of the table, then choose which group to assign them to. Click **Submit**.

Groups are created in the Settings Page and discussed in more detail in that section of this manual.



## MEMBERS PAGE

The Members Page in the CareBridge Provider Portal allows MCO Employees to view the information of all members currently in the Payer Portal. The Members Page is populated with data from the Member file, (provided by MCO) and updates daily through SFTP.

MEMBERS

PERSONAL FILTER ACTIVE MEMBERS UNASSIGNED MEMBERS COMPLIANCE SCORE

**FILTERS**

Sort by  
Member Name

ASSIGN TO

MEMBER NAME	MEMBER ID	ADDRESS	PROVIDER	ACTIVE AUTHS	STATUS	GROUP(S)	LAST VISIT
ROLLIN AARONSOHN	32726	3157 COLUMBUS CROSSING KNOXVILLE, TN 37939	HOWE GROUP	Yes	Inactive	QA 10	05/18/2020
SAY AASAF	7416635206900534520	73 JENIFER AVENUE MEMPHIS, TN 38119	CNG Mobile Health Group	Yes	Active	QA 10	07/30/2020
CHILTON ABADAM	26398	4543 AMOTH COURT NASHVILLE, TN 37240	HOWE GROUP	Yes	Active		07/01/2020
CAROL-JEAN A'BARROW	65870816260576213187	3 ROWLAND TERRACE MEMPHIS, TN 38197	CNG Mobile Health Group	Yes	Inactive	QA 5	03/24/2020
CAROL-JEAN A'BARROW	39815	3 ROWLAND TERRACE MEMPHIS, TN 38197	HOWE GROUP	Yes	Active		
ADAN ABBADO	359261592850089248	21648 PARKSIDE CENTER NASHVILLE, TN 37220	CNG HEALTH RUNOLFFSSON- KEMMER	Yes	Active		
TADIO ABBATE	68910569045692611726	9172 GRACELAND HILL MEMPHIS, TN 38131	CNG HEALTH SPINKA, REICHEL AND ROWE	Yes	Active		
BRADLY ABBATT	37587	26110 TALMADGE PASS CHATTANOOGA, TN 37416	HOWE GROUP	Yes	Active		
ALBERTO ABBAY	29780	44 SLOAN AVENUE	HOWE GROUP	Yes	Active	QA 4	

Member Details  
Provider Details

Support

### VIEW MEMBERS

From the Members page, you will see a table of all Members. The table can be filtered on multiple parameters by clicking **Filters** or sorted using the **Sort by** drop-down at the top left of the table.

### VIEW MEMBER DETAILS

To view or edit more details about a Member, select the **menu icon (3 dots)** on the right side of the Members row and select **Member Details**.

From the Member Details page, you can view Member demographic info, upcoming Appointments and completed Visits in both a calendar and list views, Discussions, and Authorizations.

The screenshot displays the 'MEMBERS > DETAILS > 3521' page for member 'CHILTON ABADAM'. The left sidebar includes navigation options like Dashboard, Discussions, Authorizations, Appointments, Visits, Billing, Members (selected), Employees, Providers, and Settings. The main content area features a calendar for '9-15 AUGUST 2020' with the 12th highlighted. Below the calendar are sections for 'Discussions' (No data) and 'Authorizations' (one entry for Zakary Boehm). Red boxes highlight the filter icons in the top right of the Discussions and Authorizations sections.

The lists of Appointments, Visits, Discussions, and Authorizations can be filtered by clicking the **upside-down filter icon** in the top right of each list. You can navigate to the details of each appointment, visit, discussion, or authorization by clicking the **three dots (options button)** at the far right of the row.

### MODIFY MEMBER DETAILS

The Member Details page is populated with data from the Member file (provided by the State to the MCO) and updates with the most recent information daily with the Member file sent from the MCO to CareBridge.

Providers cannot modify the Member File, but they can request to add or change a phone number or address in the member's details within the CareBridge Platform. These changes will not affect the Member File as received by CareBridge and must be approved by the MCO. Approval can be configured to happen automatically or require manual approval by MCO employees, and new phone numbers and addresses cannot be used by the provider until approved. To be clear, these changes are in addition to information in the Member File and exist only within the CareBridge Platform.

## Assign to a Group

To help manage members, you can assign them to groups. Groups are an open-ended tool designed to help you manage members (and providers) however you need. To assign one or many members to a group, click the **check box** to the left of their name, click the **Assign To** button in the top right of the table, then choose which group to assign them to and click **Submit**.

The screenshot shows the 'MEMBERS' page in the CareBridge Payer Portal. The page has a sidebar with navigation options: Dashboard, Discussions, Authorizations, Appointments, Visits, Billing, Members (selected), and Employees. The main content area is titled 'MEMBERS' and includes a 'PERSONAL FILTER' tab, 'ACTIVE MEMBERS', 'UNASSIGNED MEMBERS', and 'COMPLIANCE SCORE' tabs. Below these is a 'FILTERS' section with a 'Sort by' dropdown set to 'Member Name' and an 'ASSIGN TO' button highlighted with a red arrow. The table below lists members with columns: MEMBER NAME, MEMBER ID, ADDRESS, PROVIDER, ACTIVE AUTHS, STATUS, GROUP(S), and LAST VISIT. The member 'CHILTON ABADAM' is selected with a checkmark in the first column.

MEMBER NAME	MEMBER ID	ADDRESS	PROVIDER	ACTIVE AUTHS	STATUS	GROUP(S)	LAST VISIT
<input type="checkbox"/> ROLLIN AARONSOHN	32726	3157 COLUMBUS CROSSING KNOXVILLE, TN 37939	HOWE GROUP	Yes	Inactive	QA 10	05/18/2020
<input type="checkbox"/> SAY AASAF	7416635206900534520	73 JENIFER AVENUE MEMPHIS, TN 38119	CNG Mobile Health Group	Yes	Active	QA 10	07/30/2020
<input checked="" type="checkbox"/> CHILTON ABADAM	26398	4543 AMOTH COURT NASHVILLE, TN 37240	HOWE GROUP	Yes	Active		07/01/2020

Groups are created in the Settings Page and discussed in more detail in that section of the manual.

## MEMBER REPORTS

By default, the **Personal Filter** is selected when navigating to the Members page. The **Personal Filter** can be used to filter and sort the Members table in a variety of ways to return the subset of Members that is most useful. In addition to the **Personal Filter**, the Members page has three pre-filtered lists to help you quickly navigate to useful Member data:

The screenshot shows the 'MEMBERS' page with the 'PERSONAL FILTER' tab selected and highlighted with a red box. The other tabs are 'ACTIVE MEMBERS', 'UNASSIGNED MEMBERS', and 'COMPLIANCE SCORE'. The 'FILTERS' section is visible below the tabs.

- **Active Members** shows all active Members.
- **Unassigned Members** shows all Members who have not been assigned to a Group.
- **Compliance Score** returns a list of all Members sorted by Compliance Score in ascending order. View in descending order by clicking the **arrow button** to the right of the **Sort By** drop-down menu. Compliance Score is defined in CareBridge as the percentage of visits that have all the required EVV data collected, are on time (not late or missed), and are not a manual entry.

To export any table from the Members Page to a comma separated value file, click **Export to File** in the bottom left of the table and choose where to download the file.

 **EXPORT TO FILE**

# ELECTRONIC VISIT VERIFICATION (EVV) WORKFLOWS

## OVERVIEW

The following sections will help introduce the features and functionality of EVV in the CareBridge Payer Portal and how it can be used as a tool to help easily manage day-to-day workflows.

## AUTHORIZATIONS PAGE

The Authorizations page is a table of all your MCO's authorizations in the CareBridge Payer Portal. It allows MCO Employees to view authorization details and monitor Providers' actions on those authorizations. The Authorizations page reflects actions taken by Providers as well as data sent from the MCO in the Authorizations file that automatically updates daily.

MEMBER	MEMBER ID	RECEIVED DATE	START DATE	END DATE	UNITS	AUTH #	SERVICE	MODIFIERS	SCHEDULED UTILIZATION %	PROVIDER	EMPLOYEE	ACKNOWLEDGED DATE	STATUS
HY OLRNSH...	00888371281...	08/05/2020	07/01/2020	08/31/2020	10	110731209	S5125			CNG HEALTH KOHLER-RICE		08/05/2020	Acknowledged
ALBERTINA TEARNY	15544611029...	08/05/2020	12/01/2020	12/31/2020	72	110731204	S5125			CNG HEALTH KOHLER-RICE			Void
HY OLRNSH...	00888371281...	07/29/2020	07/01/2020	08/31/2020	4	110731209	S5130		75.00	CNG HEALTH KOHLER-RICE	Nate Hines	07/29/2020	Acknowledged
LINK VAN NIEKERK	17639863817...	07/29/2020	07/01/2020	07/31/2020	2	110731207	S5130			CNG HEALTH KOHLER-RICE	Nate Hines	07/29/2020	Acknowledged
ALBERTINA TEARNY	15544611029...	07/29/2020				110731205	S5130			CNG HEALTH KOHLER-RICE			Received
LINK VAN NIEKERK	17639863817...	07/29/2020	08/01/2020	08/31/2020	2	110731208	S5130	M1		CNG HEALTH KOHLER-RICE			Received
ALBERTINA TEARNY	15544611029...	07/29/2020	01/01/2020	12/31/2020	144	110731203	S5130			CNG HEALTH KOHLER-RICE			Received
ALBERTINA TEARNY	15544611029...	07/29/2020	12/01/2020	12/31/2020	72	110731204	S5130			CNG HEALTH KOHLER-RICE			Void

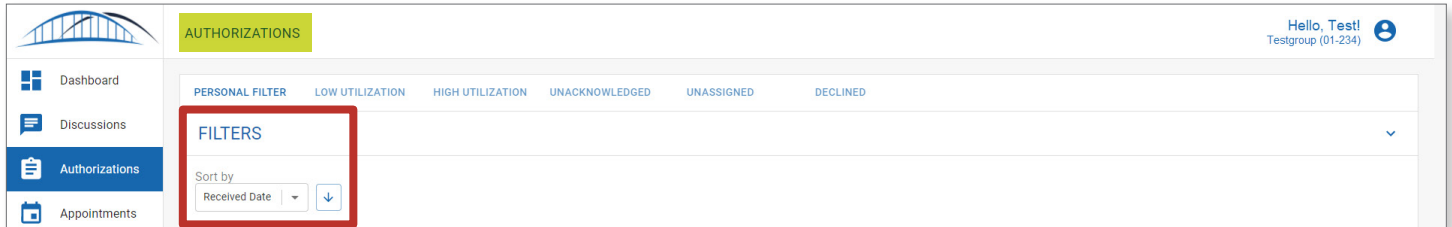
## PROVIDER WORKFLOW

Providers will receive, acknowledge, and view all authorizations assigned to them in their Authorization page. After the authorizations have been uploaded to CareBridge, Providers will acknowledge receipt by changing the authorization's status from "Received" to "Acknowledged". After Providers acknowledge an authorization, they can assign a caregiver and schedule appointments on it. As Providers schedule appointments and complete visits, all the data is collected and aggregated in the CareBridge Portal for both the Provider and MCO to view and manage.

If a provider is unable to accept an authorization, they will contact Wellpoint New Jersey directly as before EVV.

## VIEW AUTHORIZATIONS

The Authorizations page displays a table of all Authorizations currently in the Payer Portal and their important details. The table can be filtered or sorted on multiple parameters by clicking **Filters** or the **Sort by** drop-down at the top left of the table.



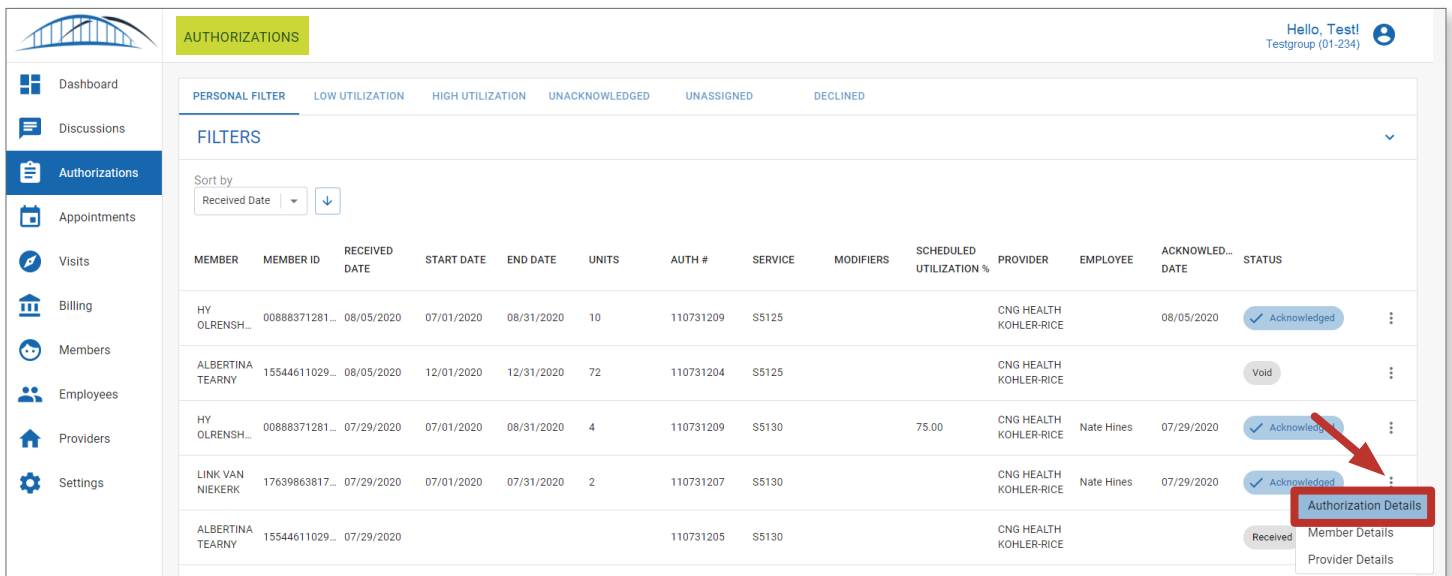
## AUTHORIZATION STATUSES

In the CareBridge Portal, authorizations have two statuses reflecting Providers' action: 'Received' and 'Acknowledged.' Providers must respond to every authorization.

- **Received:** An authorization has the status 'Received' when the MCO has sent the Provider an authorization in the CareBridge Provider Portal, but the Provider has not yet taken action to acknowledge it.
- **Acknowledged:** An authorization has the status 'Acknowledged' only when the Provider changes the authorization's status in the CareBridge Provider Portal to 'Acknowledged.'

## AUTHORIZATION DETAILS

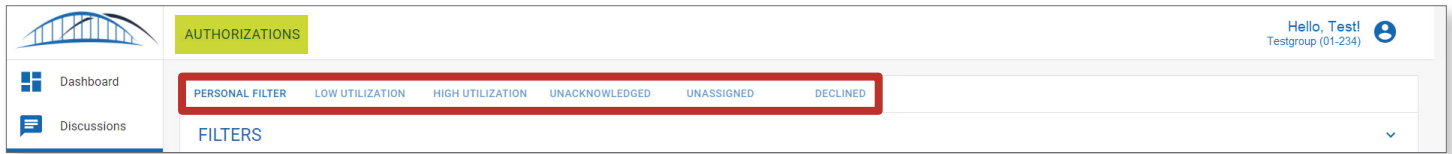
To view more details about an Authorization, click the **menu icon (3 dots)** on the right side of the Authorization's row for and select **Authorization Details**.



From the Authorization Details page, you can view start/end dates, service codes, modifiers, units, limits, schedules, utilization and billed percentages, as well as upcoming appointments and completed visits attached to the Authorization.

## AUTHORIZATIONS REPORTS

By default, the 'Personal Filter' is the first page you see when you go to the Authorizations Page. The 'Personal Filter' can be used to filter and sort Authorizations in a variety of ways to return specific subsets of Authorizations. In addition to the 'Personal Filter', the Authorizations Page has four pre-filtered lists to help you quickly see important Authorizations data:

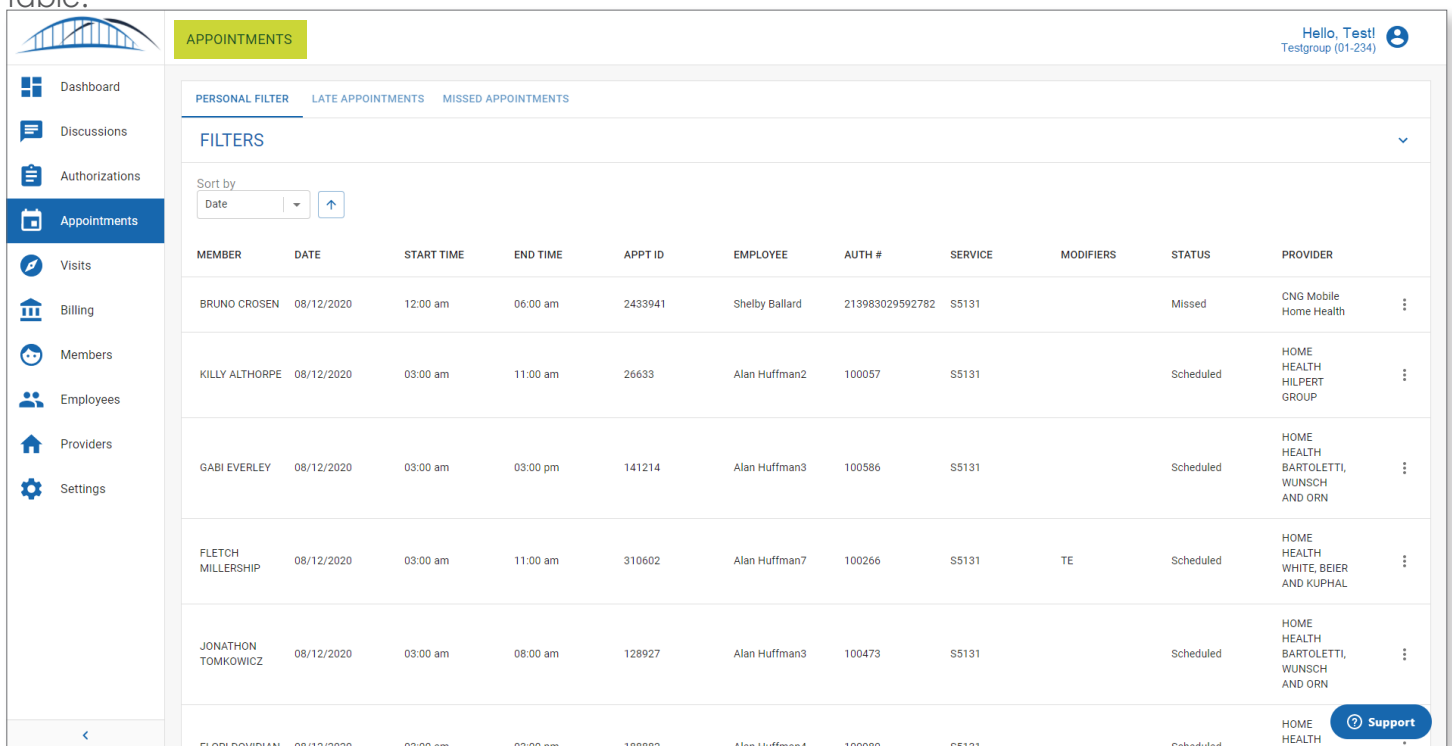


- **Low Utilization** returns all authorizations that have less than 25% of the authorized units scheduled.
- **High Utilization** returns all authorizations with greater than 75% authorized units scheduled.
- **Unacknowledged** returns all authorizations that have not yet been acknowledged. Monitoring this list will allow MCOs to proactively manage Providers who are not acting quickly enough to provide the service Members need.
- **Unassigned** returns all authorizations that have not yet been assigned a Provider employee.

To export any table from the Authorizations Page to a comma separated value file, click **Export to File** in the bottom left of the table and choose where to save the file

## APPOINTMENTS PAGE

The Appointments page allows MCO Employees to view the details of all appointments scheduled by Providers, including whether they are late or missed. The Appointments Page can be filtered and sorted on multiple parameters by clicking **Filters** or the **Sort by** drop-down menu at the top left of the table.



## PROVIDER WORKFLOW

After Providers acknowledge authorizations in the CareBridge Portal, they can assign a Caregiver and schedule appointments on that authorization. Appointments can be scheduled individually or on a recurring basis and only become visits when valid Check-In and Check-Out times are collected.

## APPOINTMENT DETAILS

To view more details about an Appointment, click the **menu icon (3 dots)** on the right side of the row for the Appointment and select **Appointment Details**. The Appointment Details page provides all relevant data for an appointment.

MEMBER	DATE	START TIME	END TIME	APPT ID	EMPLOYEE	AUTH #	SERVICE	MODIFIERS	STATUS	PROVIDER
BRUNO CROSEN	08/12/2020	12:00 am	06:00 am	2433941	Shelby Ballard	213983029592782	S5131		Missed	CNG Mobile Home Health
KILLY ALTHORPE	08/12/2020	03:00 am	11:00 am	26633	Alan Huffman2	100057	S5131		Scheduled	HOME HEALTH HILP GROUP
GABI EVERLEY	08/12/2020	03:00 am	03:00 pm	141214	Alan Huffman3	100586	S5131		Scheduled	HOMI HEAL BART WUN: Provider Details

You can view the details of a different appointment by locating it in the list on the left of the page. You can switch to viewing completed visits by clicking to **Visits** tab at the top of the list.

## APPOINTMENT REPORTS



By default, the **Personal Filter** is the first page you see when on Appointments Page. The **Personal Filter** can be used to filter and sort Appointments in a variety of ways. In addition to the **Personal Filter**, the Appointments Page has two pre-filtered lists to help you quickly see important Authorizations data:

- **Late Appointments** shows all appointments that are late. An appointment is considered late when a Check-In has not occurred within one hour of the appointment start time.
- **Missed Appointments** shows all appointments that have been missed. An appointment is considered missed when a Check-In has not occurred within three hours of the appointment start time.

## EVV IN ACTION

Through the course of a visit, EVV details are collected and sent back to the CareBridge system, including the location and time of Check-in and out, the status of Care Plan activities, and whether the Caregiver observed any changes to the member's condition. When using the mobile application, a member's signature will also be collected, if possible, at the end of the visit.

When different services are scheduled in consecutive order, the Caregiver must Check-Out of the first service and Check-In for the second service in order for the visits to be billed accurately.

Within the CareBridge EVV Platform, there are two primary methods a caregiver can use to Check-In and Check-Out of an appointment. The preferred method is using the CareBridge Mobile Application. The second is over the phone using the CareBridge Interactive Voice Response (IVR) system.

**Note** that even when cell coverage is not available at a Member's home, the mobile app can be used. The app will store the collected EVV data then forward it to CareBridge when the caregiver's mobile phone returns to an area with cell coverage.





## VISITS PAGE

In the CareBridge Platform, an appointment becomes a visit only when valid Check-in and Check-out times are collected.

MEMBER	DATE	START TIME	END TIME	EMPLOYEE	AUTH #	SERVICE	CHECK IN TIME	CHECK OUT TIME	PROVIDER	APPT ID	STATUS
THORNIE SHAPCOTT	05/12/2020	08:00 am	08:01 am	Michael Test	320139	S5131	03:20 pm	03:56 pm	HOWE GROUP	1883509	Missed and Completed
CECILIUS MCMEEKIN	05/12/2020	09:00 pm	04:59 am	Carnage Carnage_49	893219340592622	S5150	11:12 pm	05:10 am	CNG Mobile Health Group	1987665	Missed and Completed
BUNNIE GREATBACH	05/12/2020	09:00 pm	04:59 am	Super Admin	994461400434374	S5131	09:01 pm	06:18 am	CNG HEALTH DECKOW, HERMISTON AND FRAMI	2219723	Completed
STEFANO HAIZELDEN	05/12/2020	09:00 pm	04:59 am	Super Admin	631452447269111	S5150	11:22 pm	04:45 am	CNG HEALTH DECKOW, HERMISTON AND FRAMI	2220284	Late and Completed
NATHANIEL GOODBAND	05/12/2020	09:00 pm	04:59 am	Super Admin	623208872508257	S5150	09:00 pm	06:41 am	CNG HEALTH DECKOW, HERMISTON AND FRAMI	2222475	Completed

The Visits page allows MCO employees to view the details of completed visits, including any pre-claims flags identifying potential problems with a visit that may cause a claim to be rejected or denied. Providers are not able export a visit for claims if the visit is flagged.

The Visits Page can be filtered or sorted on multiple parameters by clicking **Filters** or the **Sort by** drop-down menu at the top left of the table. The data you see in the Visits Page mirrors what providers see in their Visits Page.

### VISIT DETAILS

To view more details about a Visit, click the **menu icon (3 dots)** on the right side of the visit's row and select **Visit Details**. The Visits Details page aggregates all relevant information for completed visits, including scheduling data, EVV data collected during the visit, and any data manual entered by the Provider after the visit was completed.

MEMBER	DATE	START TIME	END TIME	EMPLOYEE	AUTH #	SERVICE	CHECK IN TIME	CHECK OUT TIME	PROVIDER	APPT ID	STATUS
THORNIE SHAPCOTT	05/12/2020	08:00 am	08:01 am	Michael Test	320139	S5131	03:20 pm	03:56 pm	HOWE GROUP	1883509	Missed and Completed
CECILIUS MCMEEKIN	05/12/2020	09:00 pm	04:59 am	Carnage Carnage_49	893219340592622	S5150	11:12 pm	05:10 am	CNG Mobile Health Group	1987665	Missed and Completed
BUNNIE GREATBACH	05/12/2020	09:00 pm	04:59 am	Super Admin	994461400434374	S5131	09:01 pm	06:18 am	CNG HEALTH DECKOW, HERMISTON AND FRAMI	2219723	Completed
STEFANO HAIZELDEN	05/12/2020	09:00 pm	04:59 am	Super Admin	631452447269111	S5150	11:22 pm	04:45 am	CNG HEALTH DECKOW, HERMISTON AND FRAMI	2220284	Late and Co- Authorization Details

The **Claims History** tab of the Details Page will display billing information after the provider exports the visit for claims.

A calendar view of the member's appointments and visits is available under the **Calendar** tab of the Details Page.

## VISITS REPORTS

By default, the **Personal Filter** is selected when navigating to the Visits Page. The **Personal Filter** can be used to filter or sort the Visits table on multiple attributes to return the most useful list of Visits. In addition to the **Personal Filter**, the Visits Page has five pre-filtered lists to help quickly navigate to important visits:

- **Late Visits:** This report returns a list of all visits that have been completed but were started late. A visit's status is late when a Check-In does not occur within one hour of the scheduled start time. Late visits are not EVV-compliant in the CareBridge Platform.
- **Missed Visits:** This report returns a list of all missed visits. A visit's status is missed when a Check-In did not occur within three hours of the appointment start time. Missed visits can still be completed, in which case their status will be 'Missed and Completed'. Missed visits are not EVV-compliant in the CareBridge Platform.
- **Manual Visits:** This report returns a list of all manual entry visits. To add non-EVV visits to the system or edit details of existing EVV visits, provider employees can complete a Manual Entry. All manual entry visits will have '(Manual)' in their status. Manual entries are not EVV-compliant. Individual CDAC and CCO Caregivers can complete manual entries from the mobile application and

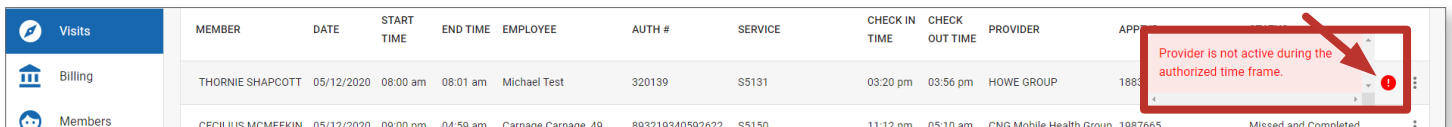
those will also be reflected here.

- **EVV Visits:** This report returns a list of all EVV-compliant visits completed using the preferred EVV method, the CareBridge mobile application.
- **IVR Visits:** This report returns a list of all EVV-compliant visits completed using IVR.

### PRE-BILLING CHECK

For a provider to export a visit to claims, the visit must pass the CareBridge pre-billing check. If a problem is found that may cause the claim to be rejected or denied, the visit is flagged with a **red exclamation icon**, and the provider will not be able to export the visit until all flags are resolved.

In addition to the Visits Page, Pre-Billing Checks are visible on the Authorizations, Appointments, and Billing pages. Clicking the **red exclamation icon** will show the details of the flag.



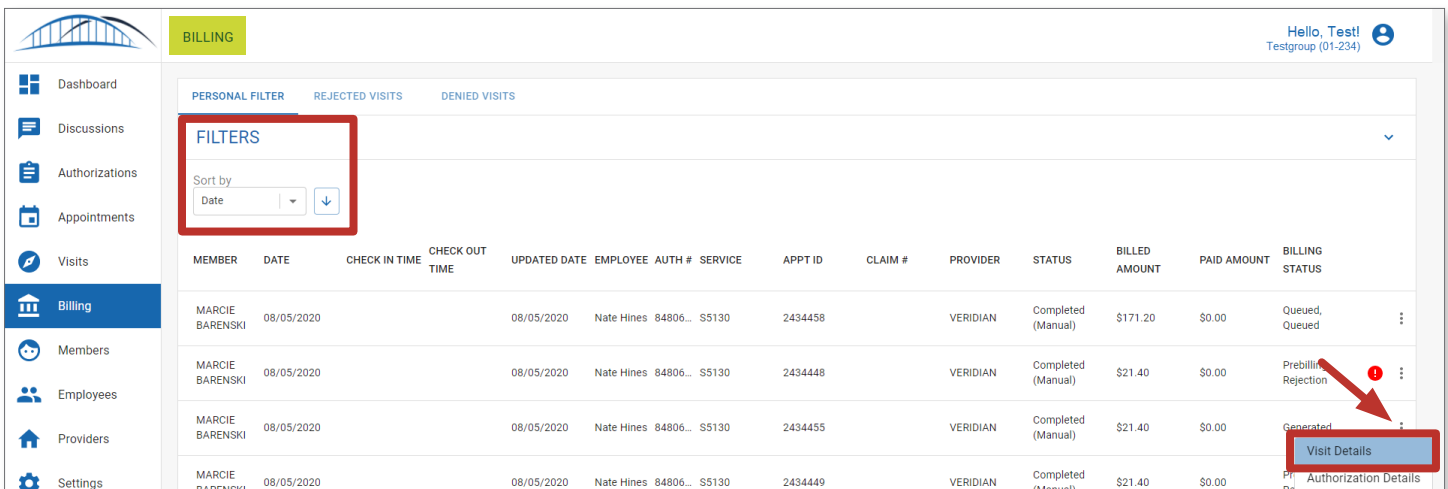
MEMBER	DATE	START TIME	END TIME	EMPLOYEE	AUTH #	SERVICE	CHECK IN TIME	CHECK OUT TIME	PROVIDER	APP
THORNIIE SHAPCOTT	05/12/2020	08:00 am	08:01 am	Michael Test	320139	S5131	03:20 pm	03:56 pm	HOWE GROUP	1883
CECILIUS MCMEEKIN	05/12/2020	09:00 am	04:50 am	Caragee Caragee_49	893219340592622	S5150	11:12 am	05:10 am	CNG Mobile Health Group	1087665

Providers may need to contact MCOs to resolve some pre-billing flags. In those cases, use the CareBridge Payer Portal to view the visit's details to ensure both you and the provider are viewing the same data. Some Examples of CareBridge pre-billing flags that providers may call MCOs to resolve are:

- Member is not eligible during appointment
- Appointment exceeds the max units of the Authorization
- Appointment is outside of the authorization dates
- MCO Data Issue

### BILLING PAGE

The Billing Page allows MCO employees to view the details of completed visits that providers have claimed, including information on denials, rejections, and paid amounts. It can be filtered or sorted on multiple parameters by clicking **Filters** or the **Sort by** drop-down at the top left of the table.



MEMBER	DATE	CHECK IN TIME	CHECK OUT TIME	UPDATED DATE	EMPLOYEE	AUTH #	SERVICE	APPT ID	CLAIM #	PROVIDER	STATUS	BILLED AMOUNT	PAID AMOUNT	BILLING STATUS
MARCIE BARENSKI	08/05/2020			08/05/2020	Nate Hines	84806...	S5130	2434458		VERIDIAN	Completed (Manual)	\$171.20	\$0.00	Queued, Queued
MARCIE BARENSKI	08/05/2020			08/05/2020	Nate Hines	84806...	S5130	2434448		VERIDIAN	Completed (Manual)	\$21.40	\$0.00	Prebillin Rejection
MARCIE BARENSKI	08/05/2020			08/05/2020	Nate Hines	84806...	S5130	2434455		VERIDIAN	Completed (Manual)	\$21.40	\$0.00	Generated
MARCIE BARENSKI	08/05/2020			08/05/2020	Nate Hines	84806...	S5130	2434449		VERIDIAN	Completed (Manual)	\$21.40	\$0.00	Pr Re

## CLAIMS HISTORY

After a visit has been exported for claims, you can view details about the Billing Status and Claim information by clicking the **menu icon (3 dots)** on the right side of the row for the Visit and select **Visit Details**.

In the Visit Details page, you can see the billing status in the 'Billing' card and details of the claim in the **Claims History** tab.

**CLAIMS HISTORY**

**Billing**

Billed Amount	\$21.40 (4 units)
Accepted Amount	\$0 (0 units)
Rejected Amount	\$0 (0 units)
Paid Amount	\$0 (0 units)
Denied Amount	\$0 (0 units)

**Claim Request #98197**

CLAIM #	PAYER CLAIM #	STATUS	DATE/TIME
IA230183	N/A	Generated	08/05/2020, 09:05 am
IA230183	N/A	New	08/05/2020, 09:05 am
IA230183	N/A	Queued	08/05/2020, 09:05 am

The **Claims History** tab displays the visit's billing and claim details. Billing details include Billed Amount, Accepted Amount, Rejected Amount, Paid Amount, and Denied Amount. Below the billing details are details on each individual claim request that was generated at export, including the individual statuses, claim number(s), and dates associated with the status changes.

## BILLING REPORTS

When navigating to the Billing Page, the **Personal Filter** is the default view and can be used to filter or sort the Billing table to return the most useful list of Billed Visits. In addition to the **Personal Filter**, the Billing Page has two pre-filtered Reports to help quickly navigate to useful billed visits data:

**BILLING**

PERSONAL FILTER REJECTED VISITS DENIED VISITS

FILTERS

- **Rejected Visits:** This report returns a list of all visits that have rejected claims.
- **Denied Visits:** This report returns a list of all visits that have denied claims.

**BILLING STATUS**

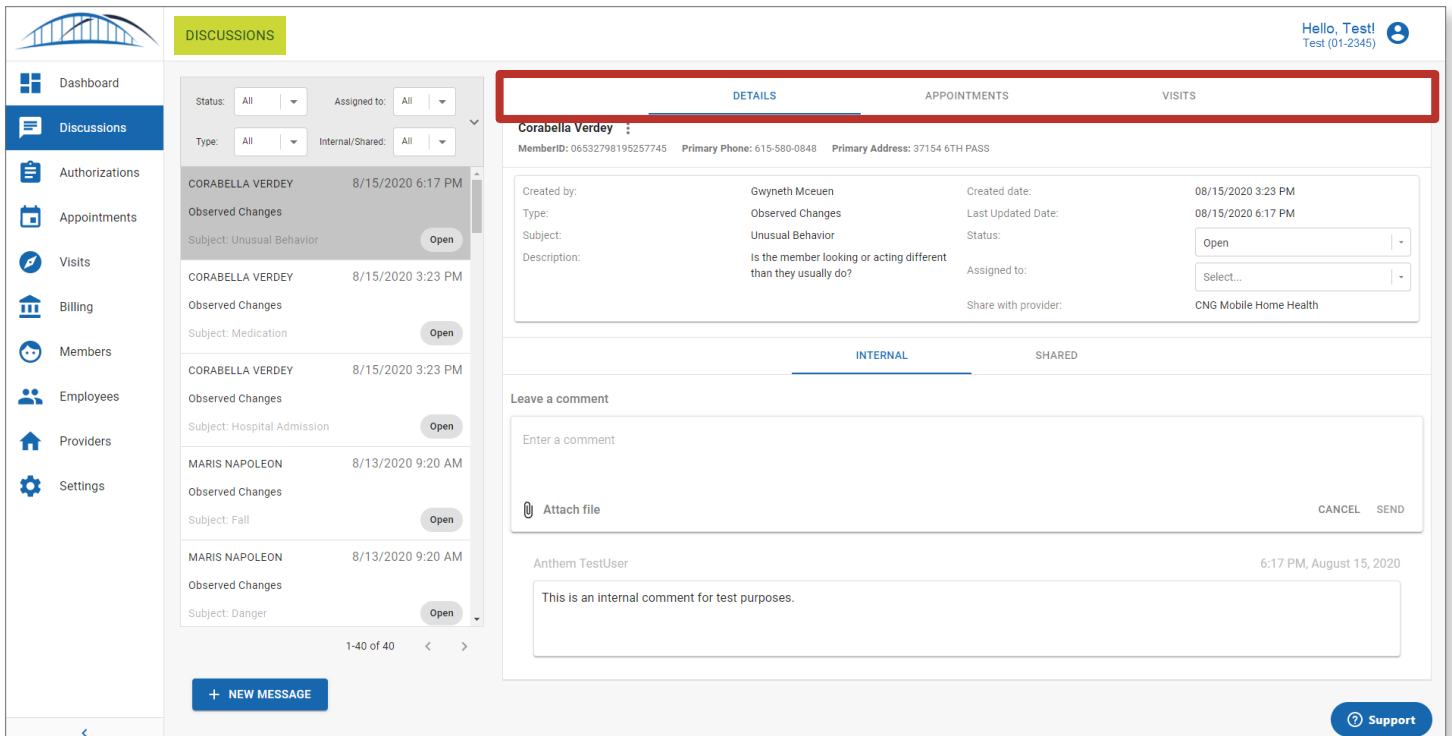
The following billing statuses are available in the CareBridge Platform and can be seen associated with Claim Requests:

<b>BILLING STATUS</b>	<b>DESCRIPTION</b>
<b>PENDING</b>	THIS VISIT HAS NOT YET BEEN EXPORTED FOR CLAIMS
<b>QUEUED</b>	THIS VISIT HAS BEEN QUEUED FOR CLAIM GENERATION
<b>GENERATED</b>	THIS VISIT HAS A CLAIM THAT HAS BEEN GENERATED
<b>SUBMITTED</b>	THIS VISIT HAS A CLAIM THAT HAS BEEN SUBMITTED TO THE MCO
<b>ACKNOWLEDGED</b>	THIS VISIT HAS A CLAIM THAT HAS BEEN RECEIVED BY THE MCO
<b>CONFIRMED</b>	THIS VISIT HAS A CLAIM THAT WAS ACCEPTED BY THE MCO
<b>PRE-BILLING REJECTION</b>	THIS VISIT WAS REJECTED DUE TO INSUFFICIENT OR INVALID DATA PRIOR TO CLAIM CREATION
<b>REJECTED</b>	THIS VISIT WAS REJECTED BY THE MCO DUE TO INSUFFICIENT OR INVALID DATA UPON INITIAL REVIEW OF THE CLAIM
<b>PAID</b>	THIS VISIT WAS PAID BY THE MCO
<b>DENIED</b>	THIS VISIT WAS DENIED BY THE MCO DUE TO INSUFFICIENT OR INVALID DATA UPON REVIEW OF THE CLAIM
<b>VOIDED</b>	THIS VISIT CLAIM WAS VOIDED

# COMMUNICATIONS

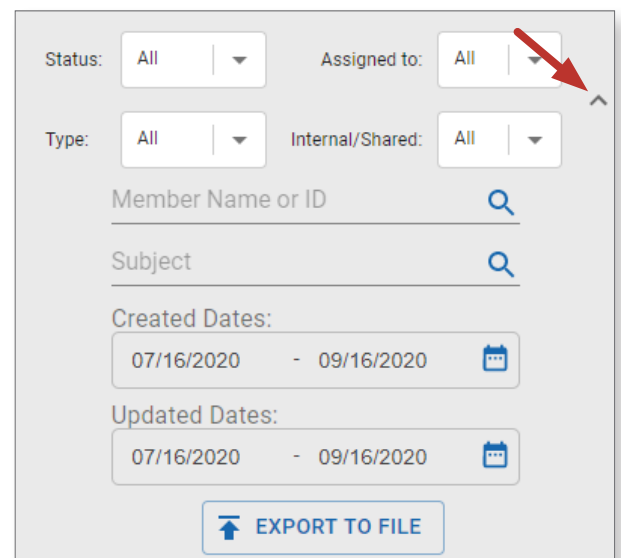
## DISCUSSIONS

The Discussions Page allows MCO employees to manage and prioritize inbound communications, act on critical tasks, and communicate internally and externally with providers to ensure issues are resolved.



## DISCUSSIONS NAVIGATION

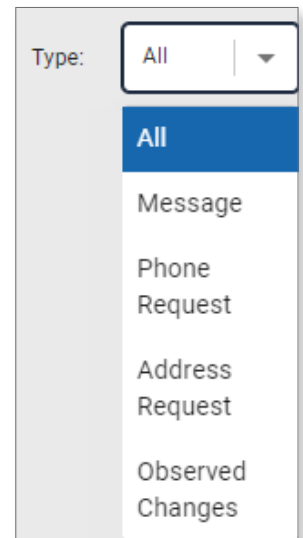
On the Discussions Page, you will see a list of all Discussions that can be filtered by **Assigned to**, **Status**, **Type**, and **Internal/External**. Clicking the **expand arrow** next to the **Status** drop-down will allow you to search for a discussion by member name or filter the list by either the date the discussion was created or last updated.



## DISCUSSION TYPES

The CareBridge Portal has four different types of Discussions:

- **Message:** This Discussion type is used for general purpose communication either internally between MCO employees or externally between MCO and provider agency employees.
- **Phone Request:** This Discussion type allows Providers to request to add a new updated Member phone number from the MCO. When providers request to update or add a phone number, a Discussion is automatically generated and sent to the Discussions page for both the Provider and the MCO. The MCO must approve the request before the provider can use the new phone number. 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. This action does not affect the Member File sent from the MCO.
- **Address Request:** This Discussion type allows Providers to request the addition of a new or updated Member address from the MCO. When providers request to add an address in the member's details, a Discussion is automatically generated and sent to the Discussions page for both the Provider and the MCO. 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. This action does not affect the Member File sent from the MCO.
- **Observed Changes:** This Discussion type allows Caregivers to communicate changes in the Member's condition to the MCO. Observed Changes Discussions are created when a Caregiver answers "yes" to an Observed Changes question during a visit. When an Observed Changes is answered with a "yes", a Discussion is automatically generated and sent to the Discussions page of both the Provider and MCO. You will want to monitor this regularly.



## 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.

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

- **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.
- **Assigned to:** To manage tasks across your organization, assign Discussions to an employee.
- **Approve/Reject:** If manually responding to an address or phone change request, click the **Approve** or **Reject** button, then close the Discussion.
- **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.

- **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** and **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.

The screenshot displays the CareBridge Payer Portal interface for a discussion. At the top, there are three tabs: 'DETAILS', 'APPOINTMENTS', and 'VISITS'. The 'DETAILS' tab is highlighted with a red box. Below the tabs, the member's name 'Corabella Verdey' is shown with a dropdown arrow. Member information includes MemberID: 06532798195257745, Primary Phone: 615-580-0848, and Primary Address: 37154 6TH PASS.

The main content area contains a table of details:

Created by:	Gwyneth Mceuen	Created date:	08/15/2020 3:23 PM
Type:	Observed Changes	Last Updated Date:	08/15/2020 6:17 PM
Subject:	Unusual Behavior	Status:	Open
Description:	Is the member looking or acting different than they usually do?	Assigned to:	Select...
		Share with provider:	CNG Mobile Home Health

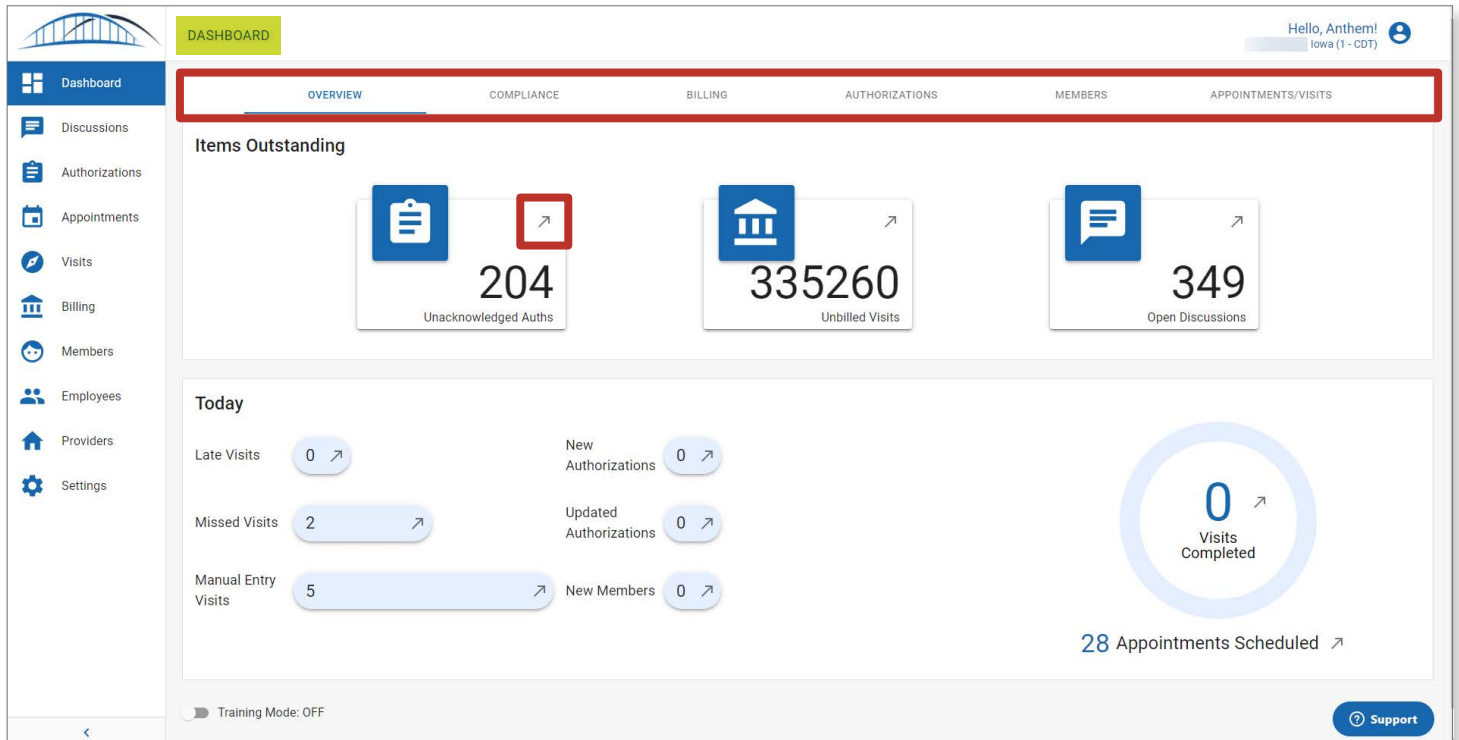
Below the details, there are two sub-tabs: 'INTERNAL' and 'SHARED'. The 'INTERNAL' sub-tab is highlighted with a red box. Underneath, there is a 'Leave a comment' section with a text input field containing 'Enter a comment', an 'Attach file' button, and 'CANCEL' and 'SEND' buttons. A comment from 'Anthem TestUser' is visible, dated '6:17 PM, August 15, 2020', with the text 'This is an internal comment for test purposes.'



## DASHBOARD & REPORTING

### DASHBOARD

The Dashboard Page allows MCO Employees to view key metrics and trends over time to better manage providers. Each of the dashboards can be filtered by date range or provider. Clicking the **arrow icon** on the top right of each metric or graph will take you to data table driving the metric or graph. For instance, clicking the **arrow** for 'Unacknowledged Auths' will take you to the table of all unacknowledged auths.

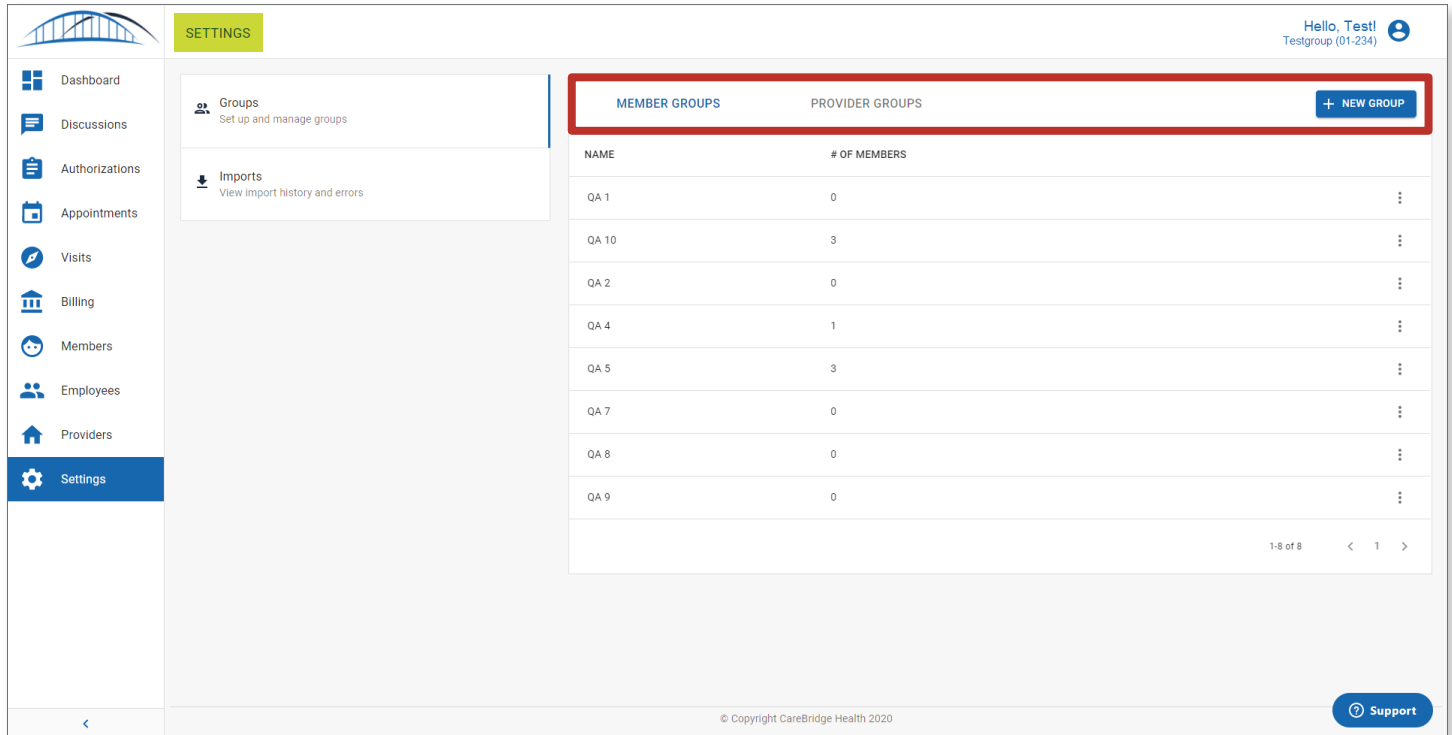


The Dashboard Page has six individual dashboards:

- **Overview:** Aggregates top-priority metrics in real time for you to monitor your provider network as the day progresses. During implementation this will help you monitor EVV adoption.
- **Compliance:** Displays a break-down of how well a provider agency is complying with EVV regulations. The compliance score is the percentage of visits that are on time, collect all required EVV data, and are not manual entries.
- **Billing:** Displays metrics related to the revenue cycle of completed Visits in the CareBridge Platform.
- **Authorizations:** Helps MCO Employees better understand the number of active Authorizations and Authorizations by Service type.
- **Members:** Helps MCO Employees explore the number of active Members and view Members with low compliance scores.
- **Appointments/Visits:** Displays metrics for how visits are being completed.

## SETTINGS PAGE

The Settings Page of the CareBridge portal has two functions: 1) create and manage Groups for members and providers and 2) view or download the member, authorization, and provider files automatically sent between your MCO and CareBridge and the details of the import's success or failure.



## GROUPS

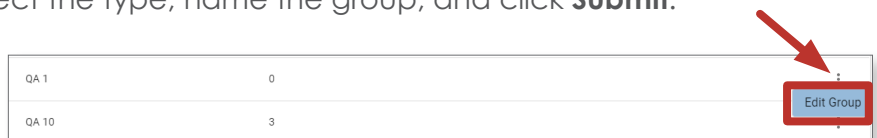
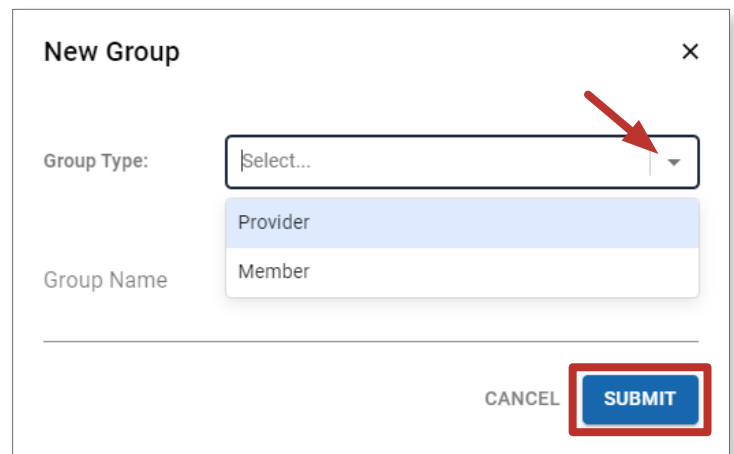
Groups in CareBridge are designed to help you better manage providers and members. They are an open-ended tool for you to use however you need. As one example, you might find it useful to create groups for Providers who operate in specific zip codes.

### Creating and Managing

To view, create, and manage your groups, go to the **Groups** tab of the Settings Page. Members and Providers have their own tabs.

To create a group, click **New Group**, select the type, name the group, and click **Submit**.

To edit or delete a group, click the **three dots** on the far right of the row and then **Edit Group**.

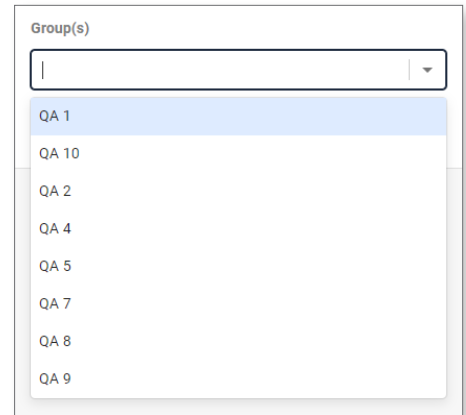


### Assigning

To assign a Member or Provider to a group, you have two options. You can navigate to the Member's or Provider's details page, scroll down to the bottom, and you will find the **Groups** drop-down menu. Click the menu and select the group you need.

You can also assign one or many members or providers to a group from their respective pages by clicking the box to the left of row, then clicking **Assign To** in the top right of the table, and choosing the group to assign them to.

Members and Providers cannot be assigned to the same group.



MEMBER NAME	MEMBER ID	ADDRESS	PROVIDER	ACTIVE AUTHS	STATUS	GROUP(S)	LAST VISIT
<input type="checkbox"/> ROLLIN AARONSOHN	32726	3157 COLUMBUS CROSSING KNOXVILLE, TN 37939	HOWE GROUP	Yes	Inactive	QA 10	05/18/2020
<input type="checkbox"/> SAY AASAF	7416635206900534520	73 JENIFER AVENUE MEMPHIS, TN 38119	CNG Mobile Health Group	Yes	Active	QA 10	07/30/2020
<input checked="" type="checkbox"/> CHILTON ABADAM	26398	4543 AMOTH COURT NASHVILLE, TN 37240	HOWE GROUP	Yes	Active		07/01/2020

### Searching Using Groups

To view Members or Providers in specific groups, go to their respective pages, expand the **Filters**, and then select the group from the **Groups** field. The table will automatically update.

MEMBER NAME	MEMBER ID	ADDRESS	PROVIDER	ACTIVE AUTHS	STATUS
<input type="checkbox"/> ROLLIN AARONSOHN	32726	3157 COLUMBUS CROSSING KNOXVILLE, TN 37939	HOWE GROUP	Yes	Inactive
<input type="checkbox"/> SAY AASAF	7416635206900534520	73 JENIFER AVENUE MEMPHIS, TN 38119	CNG Mobile Health Group	Yes	Active

## IMPORTS

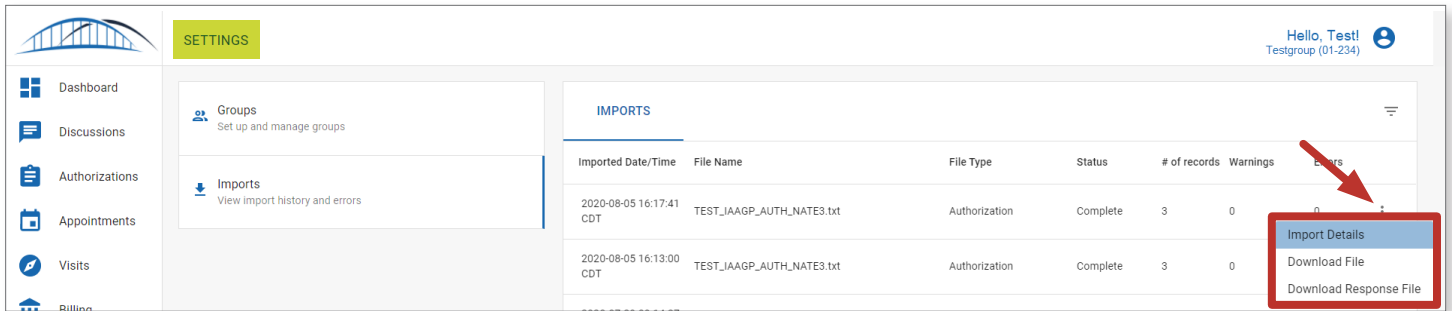
View the records and details of the import history in the **Imports tab** of the Settings Page.

Imported Date/Time	File Name	File Type	Status	# of records	Warnings	Errors
2020-08-05 16:17:41 CDT	TEST_JAAGP_AUTH_NATE3.txt	Authorization	Complete	3	0	0
2020-08-05 16:13:00 CDT	TEST_JAAGP_AUTH_NATE3.txt	Authorization	Complete	3	0	0
2020-07-29 09:14:27 CDT	TEST_JAAGP_AUTH_NATE2.txt	Authorization	Complete	3	0	0
2020-07-29 08:41:37 CDT	TEST_JAAGP_AUTH_NATE1.txt	Authorization	Complete	11	7	0
2020-07-24 12:20:49 CDT	6712530507_7_Carnage_TEST_JAAGP_PROV_data...	Provider	Failed	1	0	1
2020-07-24 12:16:19 CDT	6712530507_7_Carnage_TEST_JAAGP_AUTH_data...	Authorization	Complete	200	538	0
2020-07-24 11:22:35 CDT	7839680006_5_Carnage_MEMBER_data.csv	Member	Complete	200	0	0
2020-07-13 11:59:13 CDT	TEST_JAAGP_MEMBER_DEMO_PN.csv	Member	Complete	1	0	0
2020-07-13 11:53:38 CDT	TEST_JAAGP_MEMBER_DEMO_PN.csv	Member	Complete	1	0	0
2020-07-09 08:37:08 CDT	TEST_JAAGP_AUTH_DEMO.txt	Authorization	Complete	1000	100	0

The files are sent over secure file transfer protocol (SFTP) on a daily or weekly basis between your organization and CareBridge. Member and Authorization files update daily while Provider files update weekly.

Regardless of the file type, when CareBridge receives a file, it sends a response file back that includes information on records that were received, including any warnings or errors.

To search for specific files, click the upside down **Filters** button in the top right and search by import date, file name, and/or file type.



To view details of the import at large and individual records, click the **three dots** on the far right of the row and select **Import Details**. From the Import Details page, you can scroll through all the records. The Import Details page has four sub-tabs dividing the file into its individual records according to status. The statuses are:

- **Creates** which are newly created records,
- **Updates** which are updates to existing records,
- **Warnings** which are records with warnings that were accepted, and
- **Errors** which are records with errors that were rejected.

You can also download both the files received by CareBridge and CareBridge’s response file by clicking the **three buttons** on the far right.

