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, select **Decline**.
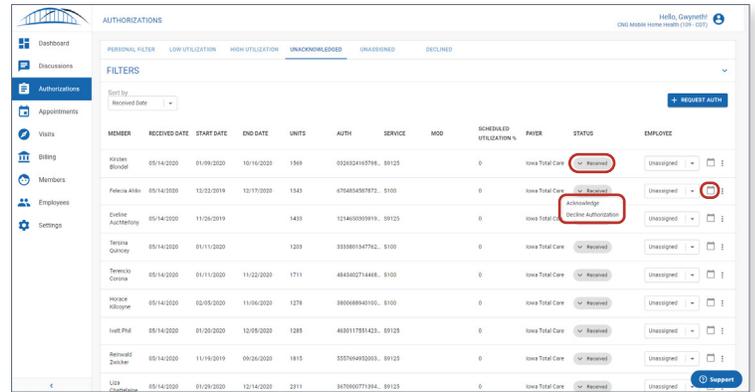
You must respond to every authorization sent to your agency by an MCO.

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.

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. For 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.
4. Select **Schedule Appointment** at the bottom.
   a. Appointments are not scheduled until **Schedule Appointment** is clicked
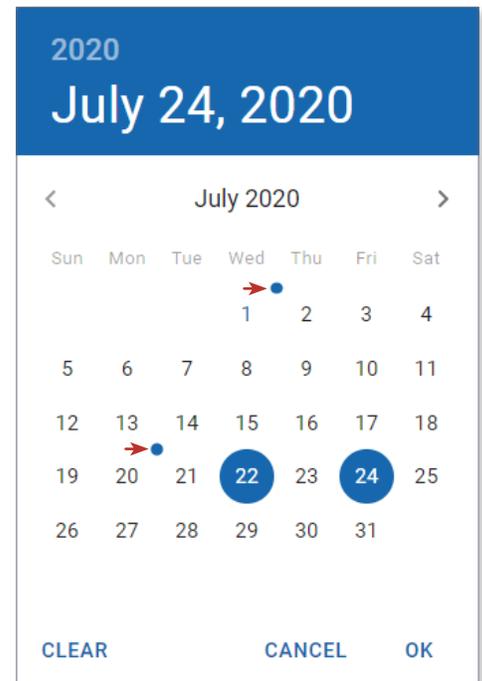
TO SCHEDULE RECURRING APPOINTMENTS:

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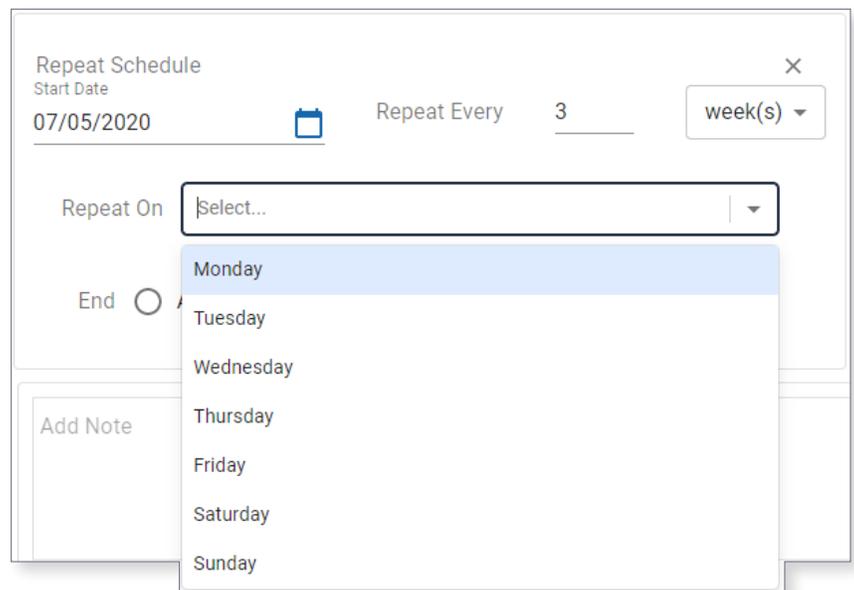
Note: You can add both individually scheduled dates as well as multiple rounds of recurring appointments into the "Dates Scheduled" window before clicking **Schedule Appointments**.

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."