

MANUAL ENTRIES IN THE PROVIDER PORTAL



The Visits page in the CareBridge Provider Portal allows Provider Agency Employees to view completed visits, pre-claim checks, and to request claims.

VIEW VISITS

The Visits Page displays a tabular view of all Visits that have been completed (Figure 1). This table can be filtered and sorted with several parameters by selecting the **expand arrow** or the word **FILTERS** at the top of the table, or the **Sort by** drop-down at the top left of the table (Figure 2).

Figure 1. Visits page

MEMBER	DATE	START TIME	END TIME	EMPLOYEE	AUTH #	SERVICE	CHECK IN TIME	CHECK OUT TIME	PAYER	APPT ID	STATUS
Jimmy Buckets	12/11/2020	04:00 PM	08:00 PM	Andrew Zallie	U-543274		12:15 PM	12:15 PM	Horizon	2435194	Early and Completed
Jimmy Buckets	12/15/2020	04:00 PM	08:00 PM	Andrew Zallie	U-543274		12:00 PM	01:00 PM	Horizon	2435196	Early and Completed (Manual)
Alex Albon	12/16/2020	10:20 AM	11:20 AM	Lane Abernathy	REF 01	S5125	10:20 AM	11:20 AM	Horizon	2436219	Completed (Manual)
Alex Caruso	12/17/2020	12:00 PM	01:00 PM	Lucas Lois	U-543308		12:27 PM	01:27 PM	Aetna	2436253	Completed (Manual)
Steph Curry	12/17/2020	02:00 PM	03:00 PM	Michael Test	U-543412		12:31 PM	12:31 PM	Aetna	2435872	Early and Completed
Jimmy Butler	12/18/2020	05:00 PM	06:00 PM	Shelby Ballard	U-543264		04:21 PM	04:23 PM	Horizon	2436281	Completed (Manual)
Federico Ayala2	12/21/2020	02:26 PM	03:26 PM	Test Birthdate2	94855555	T1019	02:26 PM	03:26 PM	Horizon	2436306	Completed (Manual)
Charo Alvarez	12/22/2020	11:51 AM	12:19 PM	Shelby Ballard	34343243243243	S9127	11:49 AM	12:15 PM	Horizon	2436311	Completed (Manual)
Alan Test	12/28/2020	06:00 AM	07:00 AM	Michael Test	1010	G0155	06:00 AM	07:00 AM	Horizon	2436321	Completed (Manual)
Charo Alvarez	12/28/2020	10:30 AM	10:50 AM	Shelby Ballard	U-543315		10:30 AM	10:50 AM	UHC	2436320	Completed (Ma

Figure 2. Visits FILTERS and Sort by drop-down options

VISIT DETAILS

To view more details about a Visit, select the **menu icon (3 dots)** on the right side of the row for the Visit and select **Visit Details** (Figure 3).

Figure 3. Visits **Menu Icon (3 dots)**

<input type="checkbox"/> MEMBER	DATE	START TIME	END TIME	EMPLOYEE	AUTH #	SERVICE	CHECK IN TIME	CHECK OUT TIME	PAYER	APPT ID	STATUS
Alex Caruso	12/17/2020	12:00 PM	01:00 PM	Lucas Lois	U-543308		12:27 PM	01:27 PM	Aetna	2436253	Completed (Manual)
Jimmy Butler	12/18/2020	05:00 PM	06:00 PM	Shelby Ballard	U-543264		04:21 PM	04:23 PM	Horizon	2436281	Completed (Manual)
<input type="checkbox"/> Charo Alvarez	12/22/2020	11:51 AM	12:19 PM	Shelby Ballard	34343243243243	S9127	11:49 AM	12:15 PM	Horizon	2436311	Completed (Manual)

From the Visit Details page (Figure 4) the user can view associated data with the visit in the 'EVV Visit' and 'Billing' cards as well as add notes to the visits. They can also move between all upcoming **APPOINTMENTS** and completed **VISITS** for a Member by selecting them from the list on the left. Finally, the user can see a **CALENDAR** view of all **APPOINTMENTS** and **VISITS** for a Member and can view the Member's **VISIT DETAILS, CARE PLAN, OBSERVED CHANGES, CALENDAR** or **SCHEDULE HISTORY** by selecting each of those options from the tabs on the right.

Figure 4. Visit Details

From the bottom of the Visit Details page, the user may utilize one action:

- **MANUAL ENTRY:** for visits not captured using the EVV app or IVR, or to edit an EVV visit, you can complete a **Manual Entry**.

MANUAL ENTRY

In some cases when an EVV Check-In or Check-Out cannot be completed or there is a need to edit an EVV Check-In or Check-Out, an Agency Employee can complete a Manual Entry. The use of Manual Entry Visits should be minimized because these do not meet the *21st Century Cures Act* requirements for a compliant visit.

For a visit that does not have an EVV Check-In and Check-Out, navigate to the Visits page and select the **MANUAL ENTRY** button from the top right of the table, then the **Manual Visit Entry** option from the drop-down (Figure 5). The 'Manual Entry' dialog will open, allowing the user to enter information about the visit and a **Manual Reason Code** indicating why an EVV Check-In or Check-Out was not possible (Figure 6).

Figure 5. Manual Visit Entry

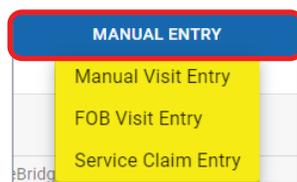


Figure 6. Manual Entry dialog

The 'Manual Entry' dialog form contains the following fields and values:

- Member:** Alex Caruso
- Authorization:** U-543308 (Active)
- Appointment (optional):** 12/17/2020 12:00 PM
- Employee:** Lucas Lois
- Status:** Completed (Manual)
- Billing Status:** Pending
- Service Code:** None
- Modifiers:** None
- Location:** 7056 LAUREL CIRCLE222, MEMPHIS TN 38197
- Check-In Date/Time:** 12/18/2020 12:27 pm
- Check-Out Date/Time:** 12/18/2020 01:27 pm
- Visit Duration:** 1 hours 0 minutes
- Check In Location:** 7056 LAUREL CIRCLE222, MEMPHIS TN 38197
- Check Out Location:** 7056 LAUREL CIRCLE222, MEMPHIS TN 38197
- Acceptable Locations:** Yes
- Payer:** Aetna
- Manual Reason Code:** Select Reason Code
- Notes:** Enter a note
- Attach file:** Attach file

Buttons: CANCEL, SUBMIT

In cases in which a visit does have an EVV Check-In or Check-Out, but has details that need to be edited, the user may navigate to 'Visit Details' (see 'Visit Details' section) and select the **MANUAL ENTRY** button to edit the visit.

EXPORT FOR BILLING

Once a visit is completed and ready to be submitted for processing, Agency Administrators may export by selecting the **check box** next to one or many visits and then selecting the **EXPORT FOR BILLING** button at the top right corner of the table (Figure 7).

Figure 7. **EXPORT FOR BILLING**

The screenshot shows a table with columns: MEMBER, DATE, START TIME, END TIME, EMPLOYEE, AUTH #, SERVICE, CHECK IN TIME, CHECK OUT TIME, PAYER, APPT ID, and STATUS. Three rows are visible, each with a checkmark in the MEMBER column. At the top right, there are two buttons: 'EXPORT FOR BILLING' (highlighted with a red box) and '+ MANUAL ENTRY'.

MEMBER	DATE	START TIME	END TIME	EMPLOYEE	AUTH #	SERVICE	CHECK IN TIME	CHECK OUT TIME	PAYER	APPT ID	STATUS
<input checked="" type="checkbox"/> Alex Caruso	12/17/2020	12:00 PM	01:00 PM	Lucas Lois	U-543308		12:27 PM	01:27 PM	Aetna	2436253	Completed (Manual)
<input type="checkbox"/> Jimmy Butler	12/18/2020	05:00 PM	06:00 PM	Shelby Ballard	U-543264		04:21 PM	04:23 PM	Horizon	2436281	Completed (Manual)
<input checked="" type="checkbox"/> Charo Alvarez	12/22/2020	11:51 AM	12:19 PM	Shelby Ballard	34343243243243	S9127	11:49 AM	12:15 PM	Horizon	2436311	Completed (Manual)

Once the **EXPORT FOR BILLING** button is selected, the CareBridge Provider Portal will assess the visits to be exported for potential claiming issues as defined by the Payer/Healthy Blue. Examples of Pre-Billing Checks that are assessed are:

- Authorization units overages
- Member eligibility
- Overlapping visits
- Authorization date ranges
- Late visit reasons

The user will be presented with a confirmation indicating that the visits they selected were successfully exported for billing or if they were not exported due to failing a Pre-Billing Check (Figure 8).

Figure 8. **EXPORT FOR BILLING** dialog

The 'Export' dialog box contains a green confirmation message: '3 Visits will be exported for billing and will be available for viewing on the Billing Page'. Below this is a table with columns: MEMBER, DATE, APPT ID, STATUS, PAYER, and BILLING ACTION. Each row has a 'Bill externally' dropdown menu. At the bottom right, there are 'GO BACK' and 'EXPORT' buttons.

MEMBER	DATE	APPT ID	STATUS	PAYER	BILLING ACTION
Charo Alvarez	12/22/2020	2436311	Completed (Manual)	Horizon	Bill externally
Jimmy Buckets	12/29/2020	2436325	Completed (Manual)	Horizon	Bill externally
Jimmy Buckets	01/04/2021	2436329	Completed	Horizon	Bill externally

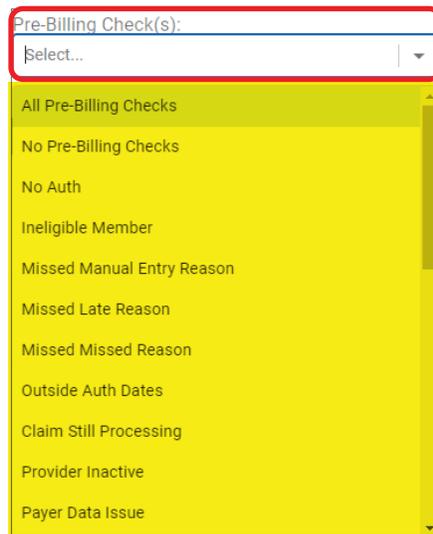
In addition to being able to view Pre-Billing Checks when exporting visits for claims, Pre-Billing Checks are also visible on the Authorizations, Appointments, Visits, and Billing pages and are denoted with the **red exclamation icon**. By clicking the **red exclamation icon**, the Pre-Billing Check is shown (Figure 9).

Figure 9. Pre-Billing Check

Alex Caruso	12/17/2020	12:00 PM	01:00 PM	Lucas Lois	U-543308	12:27 PM	01:27 PM	Aetna	2436253	Completed (Manual)	
Jimmy Butler	12/18/2020	05:00 PM	06:00 PM	Shelby Ballard	U-543264	04:21 PM	04:23 PM	Horizon	2436253	Member is ineligible during the appointment.	

Additionally, Pre-Billing Checks can be viewed on each page by filtering using the **Pre-Billing Check(s)** drop-down (Figure 10).

Figure 10. Pre-Billing Check(s) drop-down



The following is a full list of Pre-Billing Checks performed in the CareBridge Platform and potential opportunities to resolve the Pre-Billing Check to be able to submit the visit for a claim (Figure 11).

Figure 11. Pre-Billing Checks and Resolutions

PRE-BILLING CHECK	WHO RESOLVES	RESOLUTION
No auth available during the appointment	Healthy Blue	Healthy Blue issues a new auth or clarifies
Member is ineligible during the appointment	Healthy Blue	Healthy Blue changes eligibility or clarifies
Manual entry reason is missing on the appointment	Provider	Provider updates the visit with a reason
Late reason is missing on the appointment	Provider	Provider updates the visit with a reason

PRE-BILLING CHECK	WHO RESOLVES	RESOLUTION
Missed reason is missing on the appointment	Provider	Provider updates the visit with a reason
The appointment occurred outside of an auth	Healthy Blue	Healthy Blue updates auth or clarifies
The visit has a claim in progress and is locked	Provider	Provider views claim status and takes appropriate action
The payer has marked the provider as inactive during appointment	Healthy Blue	Healthy Blue re-activates the provider or clarifies
The claim has been denied by the payer	Provider	Provider views claim status and acts
Caregiver is ineligible during the appointment	Provider	Provider ensures caregiver is eligible to deliver services
The claim has been rejected	Provider	Provider views claim status and acts
Appointment has 0 units to bill	Provider	Provider updates the visit via manual entry with units to bill
Appointment service code has no rate or unit definition	Provider	Provider ensures a rate is associated to the service code and a unit definition is listed in the authorization
Appointment has a terminated authorization	Healthy Blue	Healthy Blue updates the authorization or clarifies
Appointment exceeds the auth/segments max units	Provider	Provider completes a manual entry that reduces units to allow billing or requests additional units from Healthy Blue
Caregiver has no birth date set	Provider	Provider updates caregiver birth date
Appointment has no attestation	Member	Member to attest through member portal
Appointment has no duration	Provider	Provider completes a manual entry to update the start and end times

PRE-BILLING CHECK	WHO RESOLVES	RESOLUTION
Early reason is missing on the appointment	Provider	Provider updates the visit with an early reason
Appointment has no service modifier	Provider	Provider updates the visit in appointment visit details to include a service modifier

VISITS REPORTS

By default, the **PERSONAL FILTER** is selected upon navigating to the Visits Page. The **PERSONAL FILTER** can be used to filter and sort the Visits table in a variety of ways to return the subset of Visits that is most useful.

Figure 12. Visits page **Reports**



In addition to the **PERSONAL FILTER**, there are five reports that have predefined filters to help quickly navigate to useful Visits (Figure 12).

- **LATE VISITS:** This report returns a list of all visits that have been completed, but were started late. A visit is considered late when a Check-In did not occur within one **(1) hour** of the appointment.
- **MISSED VISITS:** This report returns a list of all missed visits. A visit is considered missed when a Check- In did not occur within **three (3) hours** of the appointment start time.
- **MANUAL VISITS:** This report returns a list of all manual entry visits.
- **EVV VISITS:** This report returns a list of all completed visits that have compliant EVV data.
- **IVR VISITS:** This report returns a list of all completed IVR visits.

To export any of the data on the Visits Page to a **PDF**, **XLS**, or **CSV** file, select the **EXPORT TO FILE** button on the bottom of the page (Figure 13). Upon selecting the file type, the document will begin downloading and will be available on the Settings Page under the **DOCUMENTS** sub-tab.

Figure 13. **EXPORT TO FILE** button and menu

