# 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*

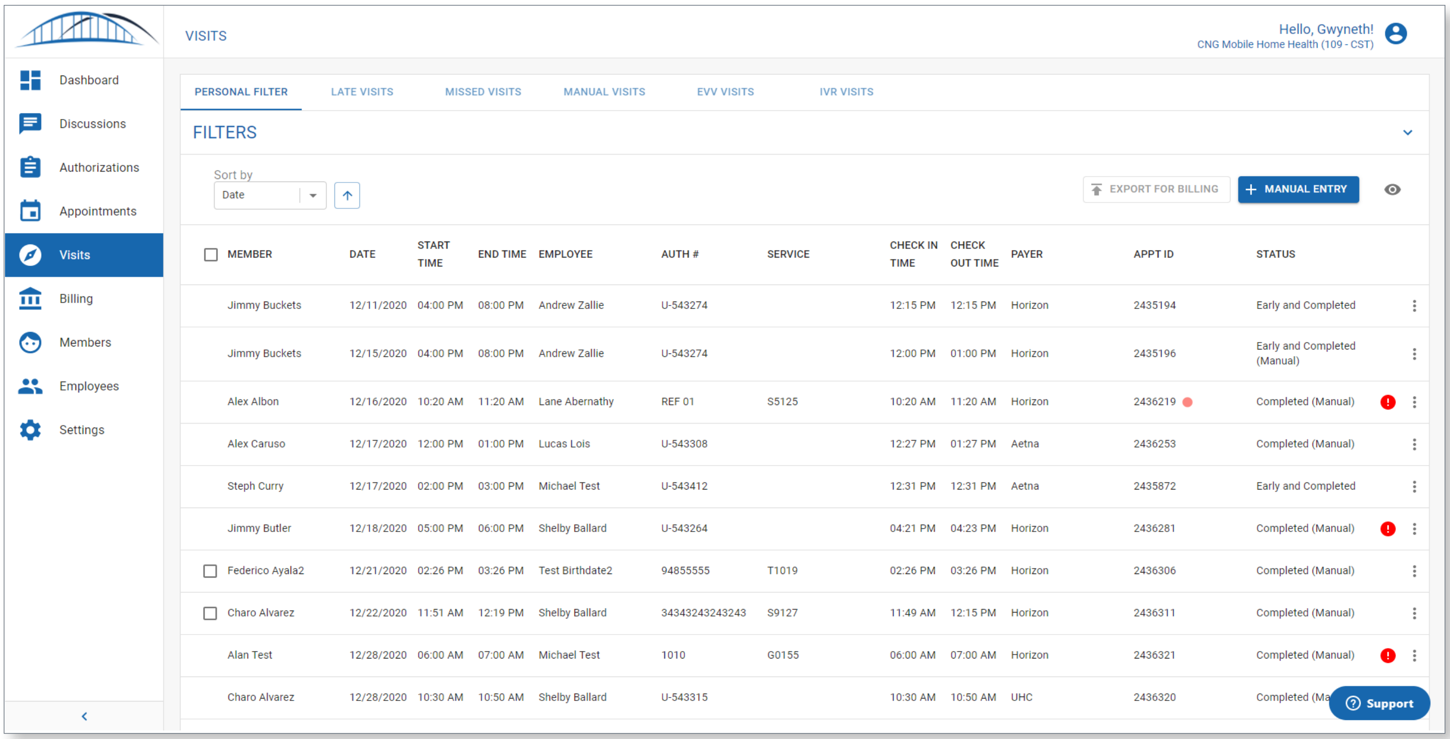
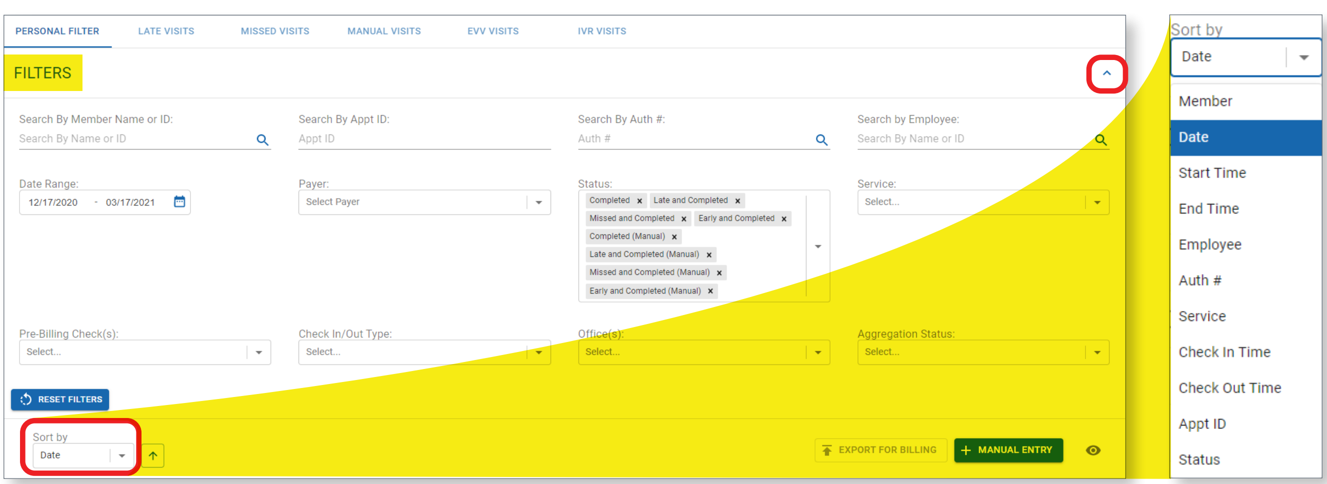


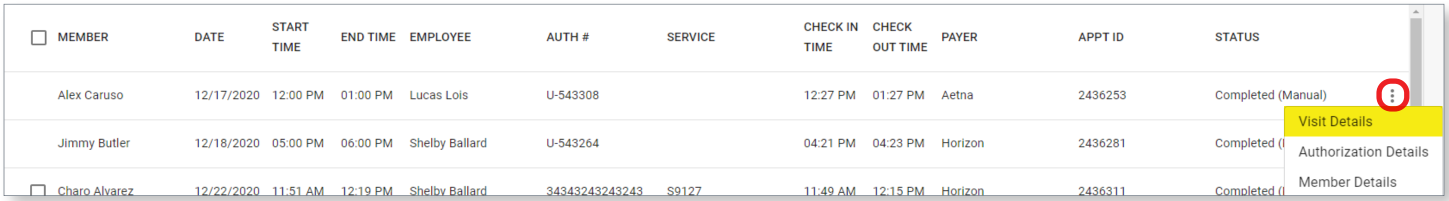

*Figure 2. Visits **FILTERS** and **Sort by** drop-down options*



## VISIT DETAILS

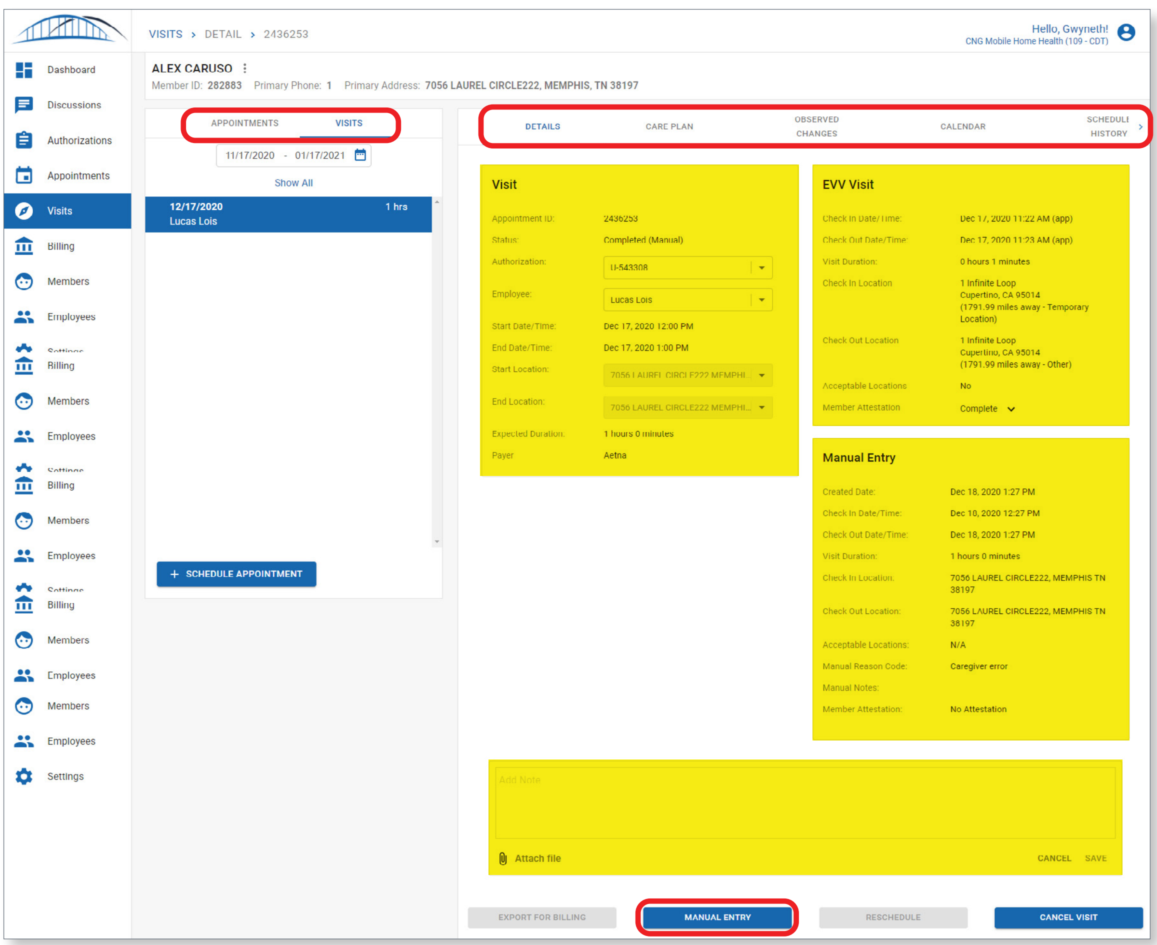
To view more details about a Visit, select the **menu icon (3 dots)** on the right side of the row for the Visit and select **Visit Details** (Figure 3).

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




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***

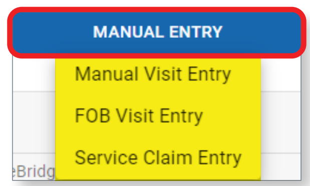
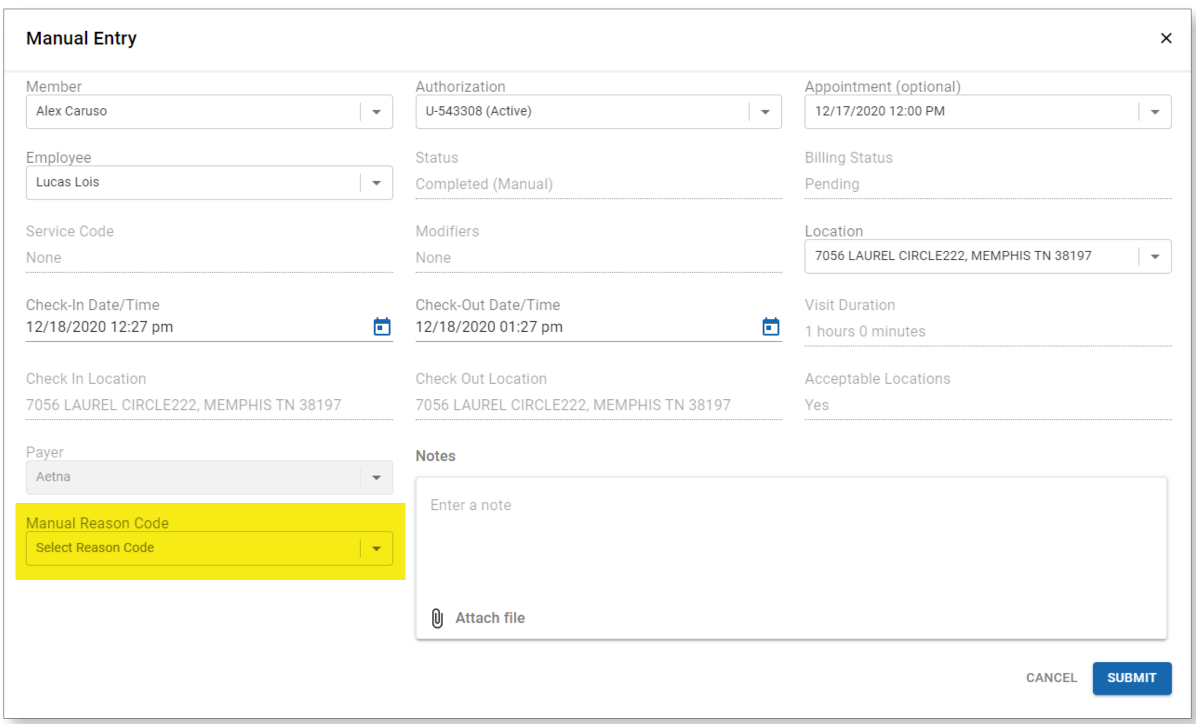



*Figure 6. Manual Entry dialog*

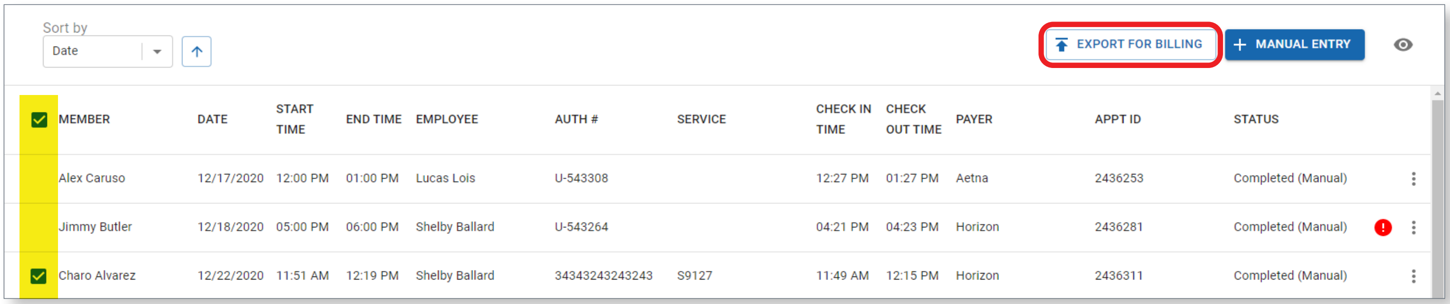



In cases in which a visit does have an EVV Check-In or Check-Out, but has details that need to be edited, the user may navigate to 'Visit Details' (see 'Visit Details' section) and select the **MANUAL ENTRY** button to edit the visit.

## 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***



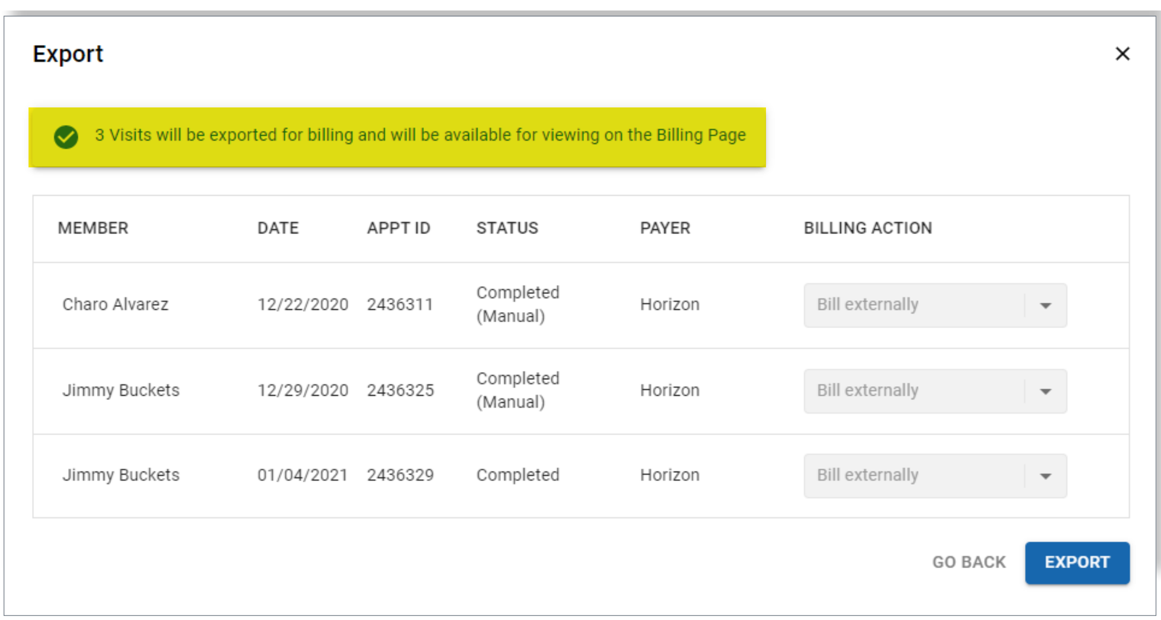

| MEMBER | DATE | START TIME | END TIME | EMPLOYEE | AUTH # | SERVICE | CHECK IN TIME | CHECK OUT TIME | PAYER | APPT ID | STATUS |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Alex Caruso | 12/17/2020 | 12:00 PM | 01:00 PM | Lucas Lois | U-543308 | | 12:27 PM | 01:27 PM | Aetna | 2436253 | Completed (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) |
| 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).

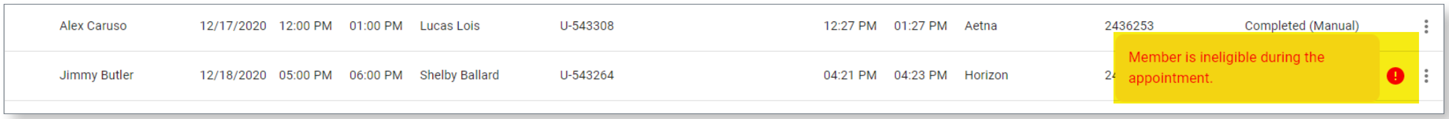
*Figure 8. **EXPORT FOR BILLING** dialog*




| 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 |

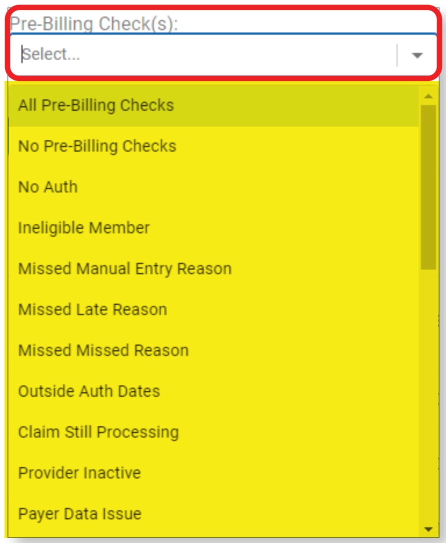
In addition to being able to view Pre-Billing Checks when exporting visits for claims, Pre-Billing Checks are also visible on the Authorizations, Appointments, Visits, and Billing pages and are denoted with the **red exclamation icon**. By clicking the **red exclamation icon**, the Pre-Billing Check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

*Figure 9. Pre-Billing Check*




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 |

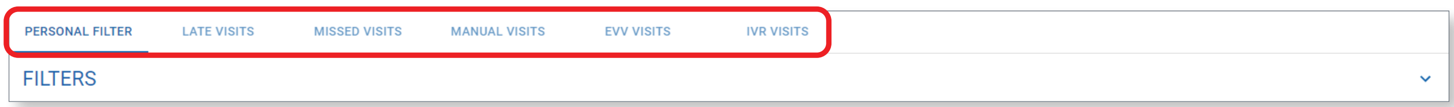
| PRE-BILLING CHECK | WHO RESOLVES | RESOLUTION |
|---|---|---|
| Missed reason is missing on the appointment | Provider | Provider updates the visit with a reason |
| The appointment occurred outside of an auth | Healthy Blue | Healthy Blue updates auth or clarifies |
| The visit has a claim in progress 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*