



CAREBRIDGE

TRAINING GUIDE

CareBridge Payer Portal Electronic Visit Verification (EVV)



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INTRODUCTION

This Training Guide is intended to help Healthy Blue employees understand how to best utilize the CareBridge Payer Solution 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 Healthy Blue CareBridge Client Relations Manager.

WHAT IS ELECTRONIC VISIT VERIFICATION (EVV)?

EVV uses technology to record the times and locations that Caregivers or Direct Support Professionals (DSPs) Check-In and Check-Out of an Appointment. EVV has been proven to accurately log Caregivers' /DSPs' times and minimize or eliminate inappropriate claims.

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

1. Type of service performed
2. Member receiving the service
3. Caregiver providing the service
4. Date of the service
5. Location of the service
6. Time the service begins
7. Time the service ends

WHAT IS CAREBRIDGE?

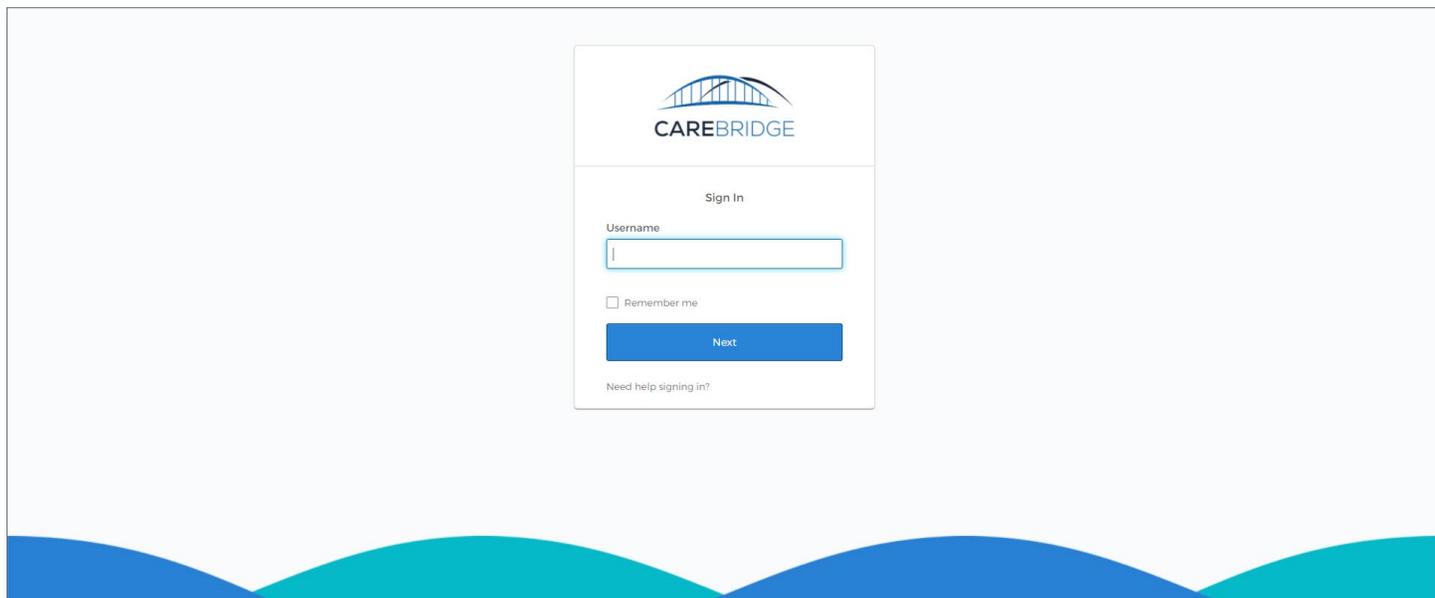
CareBridge is an EVV and EVV aggregation company formed to improve the processes that enable caring for people (Members) who receive Long-Term Services and Supports (LTSS). We offer LTSS solutions including an Electronic Visit Verification (EVV) Solution that can be utilized via a smart phone, tablet,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

SOLUTION OVERVIEW AND SETUP

OVERVIEW

The CareBridge Payer Portal is a conduit between your organization, Provider Agencies, and Caregivers. In an intuitive and user-friendly solution, it brings together all the relevant information for Members, Authorizations, Providers, Visits, and Claims to effectively manage Provider Agencies 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 FOR THE FIRST TIME

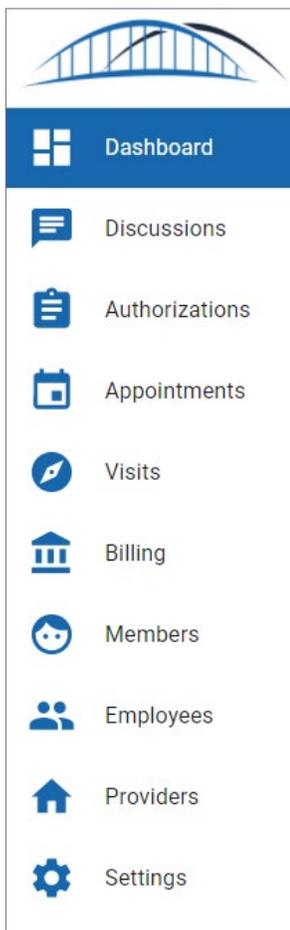
1. Your administrative user profiles will be created by CareBridge. Once the profiles are created, the usernames and temporary passwords are then communicated to each of the Admin users.
2. After the initial setup has been completed by CareBridge and new Administrative users have been supplied with their usernames and temporary passwords, The new users will navigate to <https://ncmco.carebridgehealth.com>.
3. They can use the Sign In screen to create a new password and access the Payer Portal. (Password requirements are listed on the password screen.)
 - a. Enter username and click **Next**
 - b. Enter temporary password and click **LOGIN**
4. Create a permanent password
5. After creating a permanent password, the account will be active
6. Administrative users must reset their password after 60 days.

RESETTING YOUR PASSWORD

If you forget or need to reset your password, navigate to the log in page. Immediately below the large blue **LOGIN** 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 see first. The **PERSONAL FILTER** is an unfiltered view of the page's entire data table. Most pages have additional tabs that are pre-filtered **Reports** to help you quickly view important subsets of each page's table. The pages will be discussed in more detail throughout this document.



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 Provider Agencies 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 early, late, and missed appointments

Visits: Shows completed visits and important details such as whether it was early, late, or missed; flags indicating problems, and if the visit is EVV compliant

Billing: Displays all visits that have been exported for claims by Provider Agencies 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 Provider Agencies and their relevant information

Settings: Allows Employees to 1) create groups that you can assign Provider Agencies and Members to for more efficient business management and 2) view and manage imported authorization, Member, and Provider Agency 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 new Employee's profile, including their username and a temporary password and must communicate that username and temporary password to the new Employee.

When the new Employee 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 functions in the Payer Portal.

FILE IMPORT AND EXPORTING REPORTS

CareBridge receives three (3) files from Healthy Blue through automatic secure file transfer protocol (SFTP), a Member file, an Authorizations file, and a Provider Agency file. The files for Members and Authorizations update daily, and the Provider Agency file updates weekly. Healthy Blue 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 comma-separated value files. 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 then be prompted to choose the download location on your computer.



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 updated 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 in the CareBridge Payer Portal. The page includes a navigation sidebar on the left with options like Dashboard, Discussions, Authorizations, Appointments, Visits, Billing, Members, Employees, Providers (selected), and Settings. The main content area features a 'PERSONAL FILTER' section with a 'FILTERS' button. Below this is a table of providers with columns: PROVIDER, EMAIL, ADDRESS, PHONE, NPI, CLAIM SUBMITTER ID, TAX ID, and STATUS. Each row has a checkbox on the left and a vertical ellipsis on the right. An 'ASSIGN TO' button is highlighted with a red circle in the top right corner of the table area. A 'Support' button is located at the bottom right of the page.

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 at the top right of the table, then choose the **Group** to which they should be assigned. Click **SUBMIT**.

Groups are created in the 'Settings' page and discussed in more detail in that section of this document.

MEMBERS PAGE

The Members page allows Healthy Blue Employees to view the information of all Members currently in the Payer Portal. It is populated with data from the Member files, (provided by Healthy Blue) and updates daily through SFTP.

The screenshot displays the 'MEMBERS' page in the Payer Portal. The interface includes a navigation sidebar on the left with options like Dashboard, Discussions, Authorizations, Appointments, Visits, Billing, Members (selected), Employees, Providers, and Settings. The main content area has a 'MEMBERS' header and a 'FILTERS' section. A 'Sort by' dropdown menu is open, showing 'Member Name' as the selected option. Below this is a table of members with columns: MEMBER NAME, MEMBER ID, ADDRESS, PROVIDER, ACTIVE AUTHS, STATUS, GROUP(S), and LAST VISIT. The table lists several members, including Rollin Aaronsohn, Say Aasaf, Chilton Abadam, Carol-Jean A'Barrow, Adan Abbado, Tadio Abbate, Bradly Abbatt, and Alberto Abbay. A 'Member Details' button is visible next to the third member row, and a 'Support' button is at the bottom right.

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	

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 Member's 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, as well as Discussions and Authorizations.

MEMBERS > DETAILS > 3521 Hello, Test! Testgroup (01-234)

CHILTON ABADAM

Member ID: 26398

Primary Address: [Redacted]

Secondary Address(es): 4543 AMOTH COURT, NASHVILLE, TN 37240

Email: [Redacted]

Primary Phone Number: 615-253-2572

Secondary Phone Number(s): [Redacted]

CALENDAR | APPOINTMENTS | VISITS

TODAY < > 9-15 AUGUST 2020 WEEK

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	9	10	11	12	13	14	15
1:00 AM							
2:00 AM							
3:00 AM							
4:00 AM							
5:00 AM							
6:00 AM							
7:00 AM							
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							

Discussions

CREATED BY	ASSIGNED TO	TYPE	SUBJECT	CREATED	LAST UPDATED
No data					

0 of 0 < 1 >

Authorizations

START DATE	END DATE	AUTH #	UNITS	SERVICE	MODIFIERS	STATUS	EMPLOYEE
12/13/2019	01/20/2021	301598	970	S5131	TS	Void	Zakary Boehm

1 of 1 < 1 >

The lists of Appointments, Visits, Discussions, and Authorizations can be filtered by clicking the **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 Healthy Blue) and updates with the most recent information daily with the Member file sent from Healthy Blue to CareBridge.

Providers cannot modify the Member file, but they can request to add or change a primary phone number or address in the Member's details within the CareBridge Solution. These changes will not affect the Member file as received by CareBridge and must be approved by Healthy Blue. Approval can be configured to happen automatically or require manual approval by Healthy Blue employees, and new primary 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 Solution. North Carolina auto-approves address and phone number change requests.

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 Provider Agencies) 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 the Group to which they should be assigned and click **SUBMIT**.

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

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.

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, the Members page has three pre-filtered **Reports** to help you quickly navigate to useful Member data:

The screenshot shows the 'MEMBERS' page with the 'PERSONAL FILTER', 'ACTIVE MEMBERS', 'UNASSIGNED MEMBERS', and 'COMPLIANCE SCORE' tabs highlighted in a red box. 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 early, 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 Healthy Blue authorizations in the CareBridge Payer Portal. It allows Healthy Blue Employees to view authorization details and monitor Provider Agencies' actions on those authorizations. The Authorizations page reflects actions taken by Provider Agencies as well as data sent from Healthy Blue in the Authorizations file that automatically updates daily.

MEMBER	MEMBER ID	RECEIVED DATE	START DATE	END DATE	UNITS	AUTH #	SERVICE	MODIFIERS	SCHEDULED UTILIZATION %	BILLED UTILIZATION %	PROVIDER	EMPLOYEE	ACKNOWLEDGE DATE	STATUS
ANDY WILLIAMS	45345323432	04/07/2021	11/17/2020	07/10/2022	1212	1001	T1019		117.74		CNG HEALTH WYOMING	Andrew Zallie	04/08/2021	Acknowledged
ZSAZSA PHAROAH	726224466692656	03/24/2021	11/17/2020	07/10/2022	1212	1003	T1005		1.82		CNG HEALTH WYOMING	Andrew Zallie	03/24/2021	Acknowledged
ELDEN ABETHHELL	151802036445587	03/24/2021	11/17/2020	07/10/2022	1212	1001	S5150		8.66	0.08	CNG HEALTH WYOMING	Andrew Zallie	03/24/2021	Acknowledged
ZSAZSA PHAROAH	726224466692656	03/24/2021	11/17/2020	07/10/2022	1212	1002	T1019		9.57		CNG HEALTH WYOMING	Andrew Zallie	03/24/2021	Acknowledged
ZSAZSA PHAROAH	726224466692656	03/24/2021	11/17/2020	07/10/2022	1212	1003	T1005		9.57		CNG HEALTH JMETER	Elijah Wright	04/09/2021	Acknowledged
ZSAZSA PHAROAH	726224466692656	03/24/2021	11/17/2020	07/10/2022	1212	1002	T1019		0.33		CNG HEALTH JMETER	Elijah Wright	04/13/2021	Acknowledged
ELDEN ABETHHELL	151802036445587	03/24/2021	11/17/2020	07/10/2022	1212	1001	S5150				CNG HEALTH JMETER	Justin Carter	05/17/2021	Acknowledged
CLEMENT BATTANY	31532581569626...	03/03/2021	01/30/2020	09/21/2021	1612	245789809152483	S5125				CNG HEALTH JMETER	Justin Carter	05/18/2021	Acknowledged
TIFFY CHORLEY	05513614183291...	03/03/2021	01/13/2020	09/04/2021	1957	199549305718392					CNG HEALTH JMETER			Received
STEPHAN JANIKOWSKI	35207258537411...	03/03/2021	01/03/2020	08/25/2021	2202	870846347883343	S5125				CNG HEALTH JMETER			Received

PROVIDER WORKFLOW

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

If a Provider Agency is unable to accept an authorization, they will contact Healthy Blue directly as they did 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 with multiple parameters by clicking **FILTERS** or the **Sort by** drop-down at the top left of the table.



AUTHORIZATION STATUSES

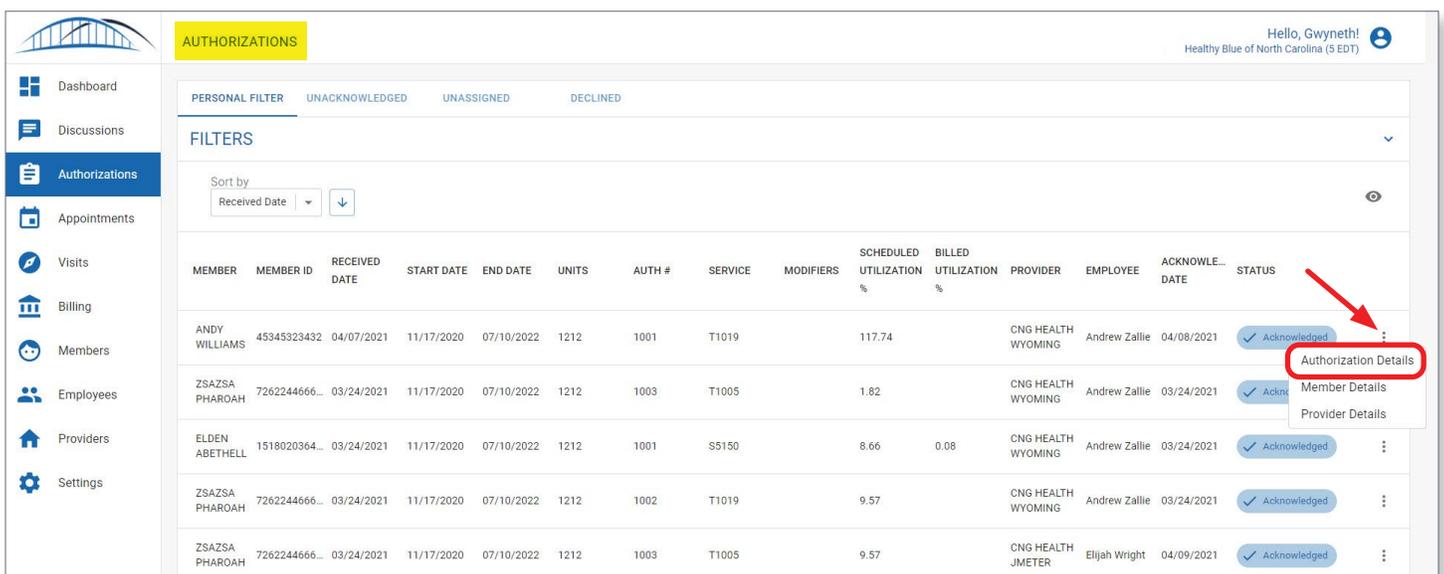
In the CareBridge Portal, authorizations have two statuses reflecting Provider Agencies' action: **Received** and **Acknowledged**. Provider Agencies must respond to every authorization.

- **Received:** An authorization has the status Received when Healthy Blue has sent the Provider Agency an authorization in the CareBridge Provider Portal, but the Provider Agency has not yet taken action to acknowledge it.
- **Acknowledged:** An authorization has the status Acknowledged only when the Provider Agency 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 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 screen 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, the Authorizations page has two pre-filtered **Reports** to help you quickly see important authorizations data:



- **UNACKNOWLEDGED** returns all authorizations that have not yet been acknowledged. Monitoring this list will allow Healthy Blue to proactively manage Provider Agencies who are not acting quickly enough to provide the service Members need.
- **UNASSIGNED** returns all authorizations that have not yet been assigned a Provider Agency employee.

To export any table from the Authorizations page to a comma-separated value file, click **EXPORT TO FILE** at the bottom left of the table and choose where to save the file.



APPOINTMENTS PAGE

The Appointments page allows Healthy Blue Employees to view the details of all appointments scheduled by Provider Agencies, including whether they are early, late, or missed. The Appointments page can be filtered and sorted with multiple parameters by clicking **FILTERS** or the **Sort by** drop-down menu at the top left of the table.

The screenshot shows the 'APPOINTMENTS' page in the CareBridge portal. The page includes a navigation sidebar on the left with options like Dashboard, Discussions, Authorizations, Appointments (selected), Visits, Billing, Members, Employees, Providers, and Settings. The main content area has a 'FILTERS' section with a 'Sort by' dropdown set to 'Date' and a table of appointment records.

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	2439941	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 HILPERT GROUP
GABI EVERLEY	08/12/2020	03:00 am	03:00 pm	141214	Alan Huffman3	100586	S5131		Scheduled	HOME HEALTH BARTOLETTI, WUNSCH AND ORN
FLETCH MILLERSHIP	08/12/2020	03:00 am	11:00 am	310602	Alan Huffman7	100266	S5131	TE	Scheduled	HOME HEALTH WHITE, BEIER AND KUPHAL
JONATHON TOMKOWICZ	08/12/2020	03:00 am	08:00 am	128927	Alan Huffman3	100473	S5131		Scheduled	HOME HEALTH BARTOLETTI, WUNSCH

PROVIDER WORKFLOW

After Provider Agencies 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.

The screenshot shows the 'APPOINTMENTS' page with a table of appointments. The second row is highlighted, and its menu icon (three dots) is circled in red, with a red arrow pointing to the 'Appointment Details' option.

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	243941	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 HILPERT GROUP
GABI EVERLEY	08/12/2020	03:00 am	03:00 pm	141214	Alan Huffman3	100586	S5131		Scheduled	HOM HEAL BART

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 the **VISITS** tab at the top of the list.

The screenshot shows the 'APPOINTMENTS > DETAIL > 44354' page for member KILLY ALTHORPE. The 'VISITS' tab is highlighted with a red circle. The 'Appointment' details are shown on the right side of the page.

Appointment Details:

- Appointment ID: 26633
- Status: Scheduled
- Authorization: 100057
- Employee: Alan Huffman2
- Start Date/Time: Aug 12, 2020 3:00 AM
- End Date/Time: Aug 12, 2020 11:00 AM
- Start Location: 64 ANZINGER STREET MEMPHIS, TN 38150
- End Location: 64 ANZINGER STREET MEMPHIS, TN 38150
- Expected Duration: 8 hours 0 minutes (0 units)
- Provider: HOME HEALTH HILPERT GROUP

Visits List:

Date	Employee	Duration
08/17/2020	Alan Huffman2	3 hour(s)
08/15/2020	Alan Huffman2	4 hour(s)
08/14/2020	Alan Huffman2	6 hour(s)
08/13/2020	Alan Huffman2	8 hour(s)
08/12/2020	Alan Huffman2	8 hour(s)
08/10/2020	Alan Huffman2	7 hour(s)
08/08/2020	Alan Huffman2	4 hour(s)
08/07/2020	Alan Huffman2	12 hour(s)
08/03/2020	Alan Huffman2	7 hour(s)
08/02/2020	Alan Huffman2	12 hour(s)

APPOINTMENT REPORTS

By default, the **PERSONAL FILTER** is the first screen you see when on the Appointments page. The **PERSONAL FILTER** can be used to filter and sort appointments in a variety of ways. In addition, the Appointments page has two pre-filtered **Reports** 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 (1) 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 (3) 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 for the visits to be billed accurately. Concurrent appointments cannot overlap. For instance, the first service is scheduled from 9am to 10am. The next visit must start at 10:01am. Two visits cannot occur within the same minute.

Within the CareBridge EVV Solution, 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 method is to use the CareBridge Interactive Voice Response (IVR) system from an approved phone number.

Please Note: The mobile app can be used even when cell or Wi-Fi coverage is not available at a Member's home. The app will store the collected EVV data and then forward it to CareBridge when the caregiver's mobile phone returns to an area with cell or Wi-Fi coverage.



VISITS PAGE

In the CareBridge Solution, 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	EVV VENDOR	APPT ID	STATUS
FEDERICA EDARDS	05/18/2021	10:59 AM	11:00 AM	Justin Carter	029910032637417	S5125	10:59 AM	11:00 AM	CNG HEALTH JMETER	CareBridge	3968	Completed (Manual)
ADLER RUDDIN	05/19/2021	09:35 AM	09:35 AM	Derek Onay	111224304884672	S5125	09:35 AM	09:35 AM	CNG HEALTH WYOMING	CareBridge	4444	Completed
ANDY WILLIAMS	05/22/2021	12:00 PM	11:00 PM	Andrew Zallie	1001	T1019	06:54 AM	06:54 AM	CNG HEALTH WYOMING	CareBridge	706	Missed and Completed

The Visits page allows Healthy Blue 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. Provider Agencies are not able export a visit for claims if the visit is flagged.

The Visits page can be filtered or sorted with multiple parameters by clicking **FILTERS** or the **Sort by** drop-down menu at the top left of the table. The data you see on the Visits page mirrors what Providers see on 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 Visit Details page aggregates all relevant information for completed visits, including scheduling data, EVV data collected during the visit, and any data manually entered by the Provider Agency after the visit was completed.

MEMBER	DATE	START TIME	END TIME	EMPLOYEE	AUTH #	SERVICE	CHECK IN TIME	CHECK OUT TIME	PROVIDER	EVV VENDOR	APPT ID	STATUS
FEDERICA EDARDS	05/17/2021	03:29 AM	03:30 AM	Justin Carter	029910032637417	S5125	03:29 AM	03:30 AM	CNG HEALTH JMETER	CareBridge	3888	Completed (Manual)
KORY CASSELS	05/17/2021	11:29 AM	11:30 AM	Justin Carter	379761854652315	S5125	11:29 AM	11:30 AM	CNG HEALTH JMETER	CareBridge	2435	Comple
KORY CASSELS	05/17/2021	03:29 PM	03:30 PM	Justin Carter	379761854652315	S5125	03:29 PM	03:30 PM	CNG HEALTH JMETER	CareBridge	2614	Comple

The screenshot shows the 'VISITS > DETAIL > 395482' page. The member is BUNNIE GREATBACH (Member ID: 45481, Primary Phone: 4235955811, Primary Address: 8966 TRUAX AVENUE, CHATTANOOGA, TN 37410). The 'CLAIMS HISTORY' tab is highlighted in red. The 'Visit' details include: Appointment ID: 2219723, Status: Completed, Authorization: 994461400434374, Employee: Super Admin, Start Date/Time: May 12, 2020 9:00 PM, End Date/Time: May 13, 2020 4:59 AM, Start Location, End Location, Expected Duration: 7 hours 59 minutes (0 units), and Provider: CNG HEALTH DECKOW, HERMISTON AND FRAMI. The 'EVV Visit' section shows Check In Date/Time: May 12, 2020 9:01 PM (app), Check Out Date/Time: May 13, 2020 6:18 AM (app), Visit Duration: 9 hours 17 minutes (0 units), Check In Location: 8966 TRUAX AVENUE CHATTANOOGA, TN 37410, Check Out Location: 8966 TRUAX AVENUE CHATTANOOGA, TN 37410, and Acceptable Locations: No. A 'BILLING' section is also visible at the bottom.

The **CLAIMS HISTORY** tab of the Visit Details page will display billing information after the Provider Agency exports the visit for billing.

A calendar view of the Member’s appointments and visits is available under the **CALENDAR** tab of the Visit 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 with multiple attributes to return the most useful list of Visits. In addition, the Visits page has six pre-filtered **Reports** to help quickly navigate to important visits.

The screenshot shows the 'VISITS' page with the 'PERSONAL FILTER' tab selected. Below it, six pre-filtered reports are listed: LATE VISITS, MISSED VISITS, EARLY VISITS, MANUAL VISITS, EVV VISITS, and IVR VISITS. These reports are highlighted with a red box.

- **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 (1) hour of the scheduled start time. Late visits are not EVV-compliant in the CareBridge Solution.
- **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 (3) 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 Solution.
- **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 Agency Employees can complete a Manual Entry. All Manual Entry visits will have '(Manual)' in their status. Manual Entries are not EVV-compliant.
- **EARLY VISITS:** This report returns a list of all early visits. A visit is considered early when a Check-In happens thirty (30) minutes or more before the scheduled start time. Early visits are not EVV-compliant.

- **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 Agency to export a visit for billing, 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 Agency will not be able to export the visit until all flags are resolved.

	MEMBER	DATE	START TIME	END TIME	EMPLOYEE	AUTH #	SERVICE	CHECK IN TIME	CHECK OUT TIME	PROVIDER	APPT #	STATUS
	THORNIE SHAPCOTT	05/12/2020	08:00 am	08:01 am	Michael Test	320139	S5131	03:20 pm	03:56 pm	HOWE GROUP	1883	Provider is not active during the authorized time frame.
	CECILIUS MCMEEKIN	05/12/2020	09:00 pm	04:50 am	Caragee Caragee_49	893219340592622	S5150	11:12 pm	05:10 am	CNG Mobile Health Group	1987665	Missed and Completed

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.

Provider Agencies may need to contact Healthy Blue to resolve some Pre-Billing Checks. In those cases, use the CareBridge Payer Portal to view the visit details and ensure both you and the Provider Agency are viewing the same data. Some examples of CareBridge Pre-Billing Checks that Provider Agencies may call Healthy Blue to resolve are:

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

BILLING PAGE

The Billing page allows Healthy Blue Employees to view the details of completed visits that Provider Agencies have claimed, including information on denials, rejections, and paid amounts. It can be filtered or sorted with multiple parameters by clicking **FILTERS** or the **Sort by** drop-down at the top left of the table.

CLAIMS HISTORY

After a visit has been exported for billing, you can view details about the billing status and claim information by clicking the **menu icon (3 dots)** at 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.

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 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 screen and can be used to filter or sort the Billing table to return the most useful list of billed visits. In addition, the Billing page has two pre-filtered **Reports** to help quickly navigate to useful billed visits data:



- **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 STATUSES

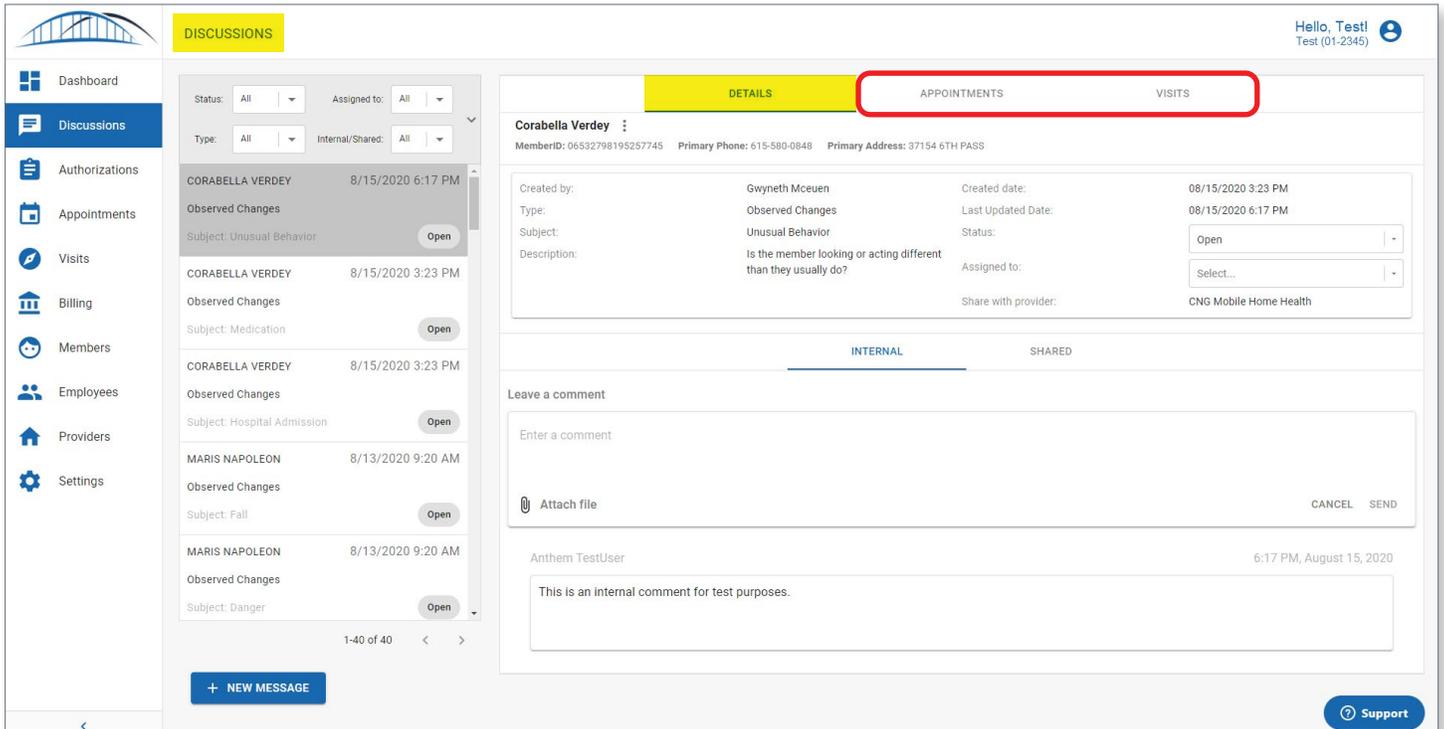
The following billing statuses are available in the CareBridge Solution and can be seen associated with claim requests:

BILLING STATUS	DESCRIPTION
Pending	This visit has not yet been exported for billing
Queued	This visit has been queued for claim generation
Generated	This visit has a claim that has been generated
Submitted	This visit has a claim that has been submitted to Healthy Blue
Acknowledged	This visit has a claim that has been received by Healthy Blue
Confirmed	This visit has a claim that was accepted by Healthy Blue
Pre-billing Rejection	This visit was rejected due to insufficient or invalid data prior to claim creation
Rejected	This visit was rejected by Healthy Blue due to insufficient or invalid data upon initial review of the claim
Paid	This visit was paid by Healthy Blue
Denied	This visit was denied by Healthy Blue due to insufficient or invalid data upon review of the claim
Voided	This visit claim was voided

COMMUNICATIONS

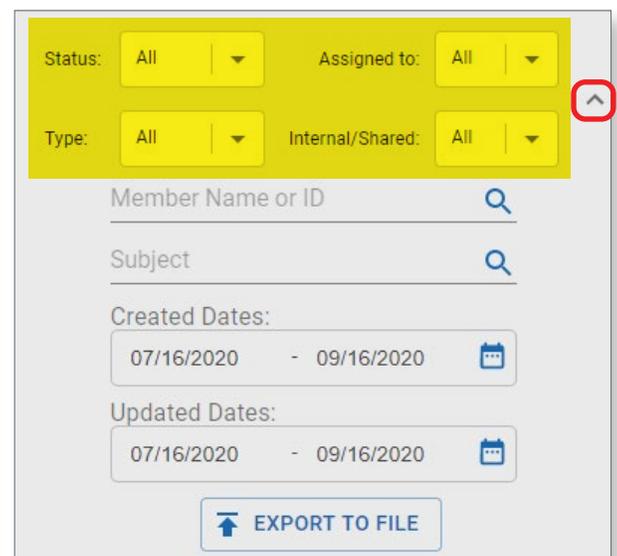
DISCUSSIONS

The Discussions page allows Healthy Blue Employees to manage and prioritize inbound communications, act on critical tasks, and communicate internally and externally with Provider Agencies to ensure issues are resolved.



DISCUSSIONS NAVIGATION

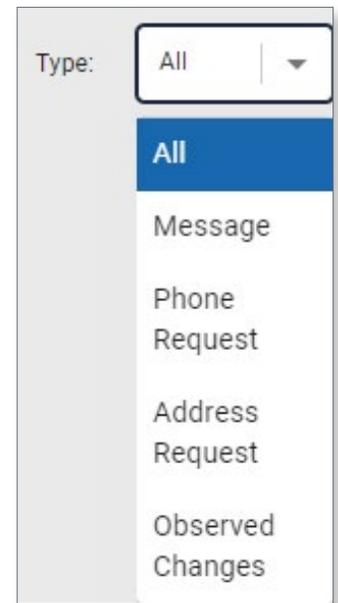
On the Discussions page, you will see a list of all discussions that can be filtered by **Assigned to**, **Status**, **Type**, and **Internal/External**. Clicking the **expand arrow** next to the **Status drop-down** will allow you to search for a discussion by Member name or filter the list by either 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 Healthy Blue Employees or externally between Healthy Blue and Provider Agency Employees.
- **Phone Request:** This discussion type allows Provider Agencies to request to add a new or updated Member phone number from Healthy Blue. 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 Agency and Healthy Blue. Healthy Blue must approve the request before the Provider Agency can use the new phone number. If Healthy Blue 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 Healthy Blue.
- **Address Request:** This discussion type allows Provider Agencies to request the addition of a new or updated Member address from Healthy Blue. When Provider Agencies 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 Agency and Healthy Blue. Healthy Blue must approve the request before the new address is active. If Healthy Blue 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 Healthy Blue. North Carolina has opted for auto approval of address change requests.
- **Observed Changes:** This discussion type allows Caregivers to communicate changes in the Member's condition to Healthy Blue. Observed Changes discussions are created when a Caregiver answers "yes" to an Observed Changes question during a visit. When an Observed Changes question is answered with a "yes", a discussion is automatically generated and sent to the Discussions page of both the Provider Agency and Healthy Blue. You will want to monitor this regularly.



DISCUSSION DETAILS

Clicking on a discussion will display the discussion's details. From the discussion **DETAILS** tab, you can add information or update the discussion.

There are multiple actions that can be taken from the discussion **DETAILS** tab:

- **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 the appropriate 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 Agency 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 both an **INTERNAL** and a **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.

DETAILS
APPOINTMENTS
VISITS

Corabella Verdey ⋮

MemberID: 06532798195257745 Primary Phone: 615-580-0848 Primary Address: 37154 6TH PASS

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

INTERNAL
SHARED

Leave a comment

Enter a comment

Attach file
CANCEL SEND

Anthem TestUser 6:17 PM, August 15, 2020

This is an internal comment for test purposes.

DASHBOARD & REPORTING

DASHBOARD

The Dashboard page allows Healthy Blue Employees to view key metrics and trends over time to better manage Provider Agencies. Each of the dashboards can be filtered by date range or provider. Clicking the **arrow icon** at the top right of each metric or graph will take you to data tables driving that metric or graph. For instance, clicking the **arrow** for Unacknowledged Auths will take you to the table of all Unacknowledged Auths.

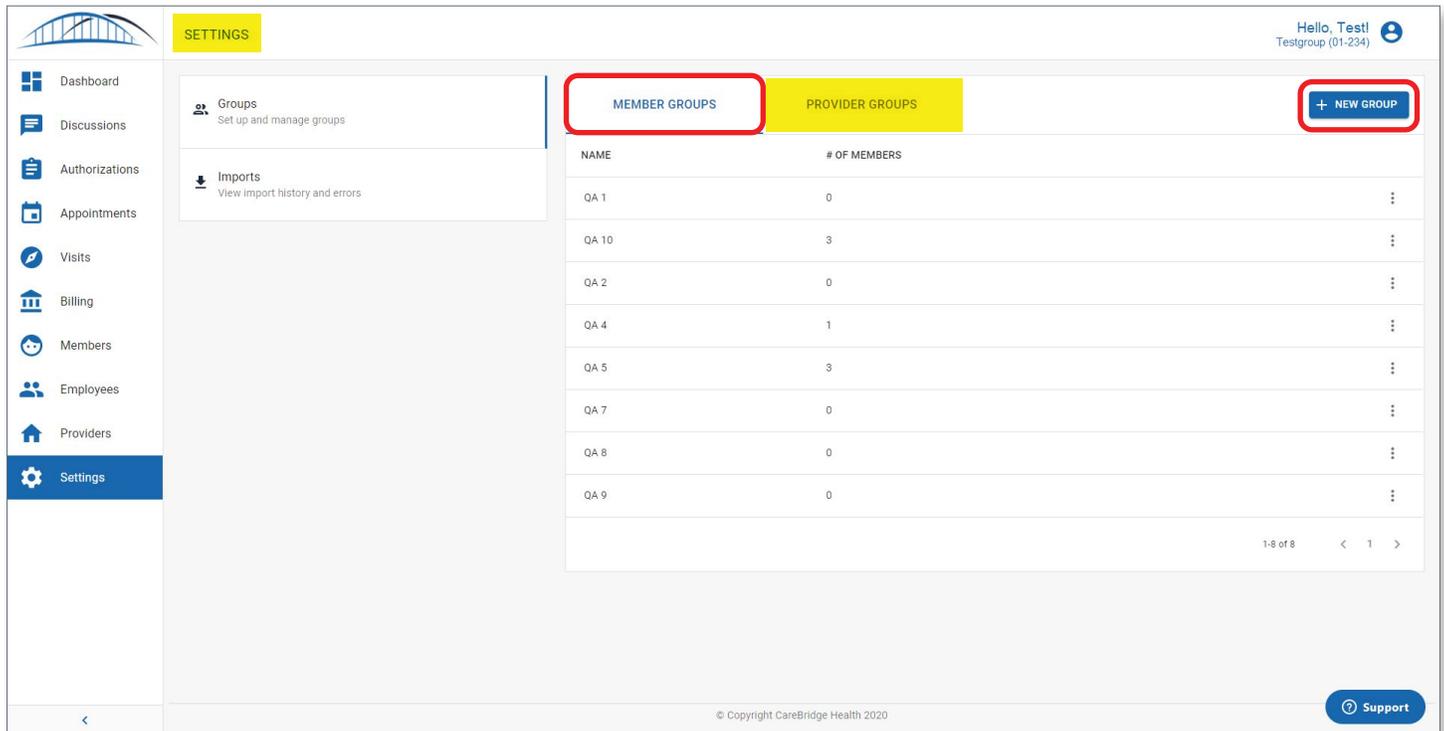
The screenshot shows the CareBridge Dashboard interface. At the top, there is a navigation bar with tabs for OVERVIEW, COMPLIANCE, BILLING, AUTHORIZATIONS, MEMBERS, and APPOINTMENTS/VISITS. The OVERVIEW tab is highlighted in yellow. Below the navigation bar, the dashboard is divided into several sections. The 'Items Outstanding' section features three cards: 'Unacknowledged Auths' with a value of 204, 'Unbilled Visits' with a value of 335260, and 'Open Discussions' with a value of 349. The 'Today' section displays various metrics: Late Visits (0), Missed Visits (2), Manual Entry Visits (5), New Authorizations (0), Updated Authorizations (0), and New Members (0). A large circular gauge shows '0 Visits Completed' and '28 Appointments Scheduled'. A red box highlights the 'OVERVIEW' tab in the navigation bar. The bottom of the dashboard includes a 'Training Mode: OFF' toggle and a 'Support' button.

The Dashboard page has six individual dashboards:

- **OVERVIEW:** Aggregates top-priority metrics in real time for you to monitor your Provider Agency 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 Solution.
- **AUTHORIZATIONS:** Helps Healthy Blue Employees better understand the number of active authorizations and authorizations by service type.
- **MEMBERS:** Helps Healthy Blue 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 Provider Agencies and 2) View or download the Member, authorization, and Provider Agency files automatically sent between Healthy Blue and CareBridge and the details of the import's success or failure.



GROUPS

Groups in CareBridge are designed to help you better manage Provider Agencies 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 Provider Agencies who operate in specific zip codes.

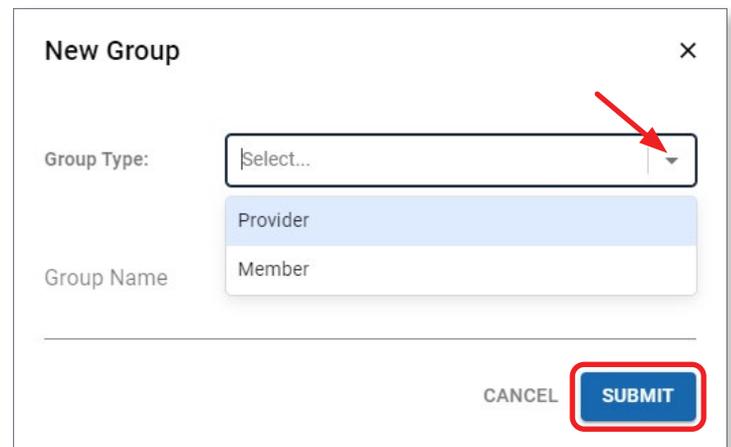
Creating and Managing

To view, create, and manage your groups, go to the **GROUPS** tab of the Settings page.

MEMBER GROUPS and **PROVIDER GROUPS** have their own sub-tabs.

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

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

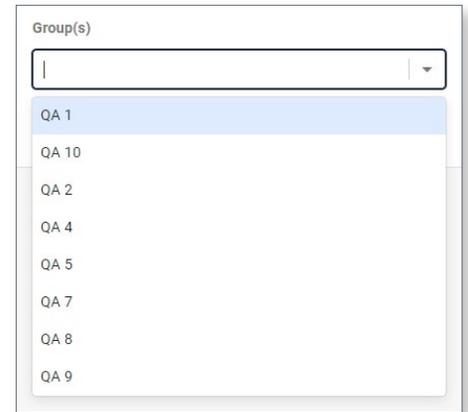


Assigning

To assign a Member or Provider Agency to a group, you have two options. You can navigate to the Member or Provider Agency 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 checking the box to the left of row, then clicking **ASSIGN TO** in the top right of the table and choosing the group to which they need to be assigned.

Members and Providers cannot be assigned to the same group.



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
<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 Provider Agencies 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.

MEMBERS

PERSONAL FILTER ACTIVE MEMBERS UNASSIGNED MEMBERS COMPLIANCE SCORE

FILTERS

Member Name or ID: Search By Name or ID

Street Address: City: State: Zip Code:

Provider: Select Provider Status: All Active Auths: All

RESET FILTERS

Sort by Member Name

Group: Select Group

Unassigned

QA 1

QA 10

QA 2

QA 4

QA 5

QA 7

QA 8

QA 9

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

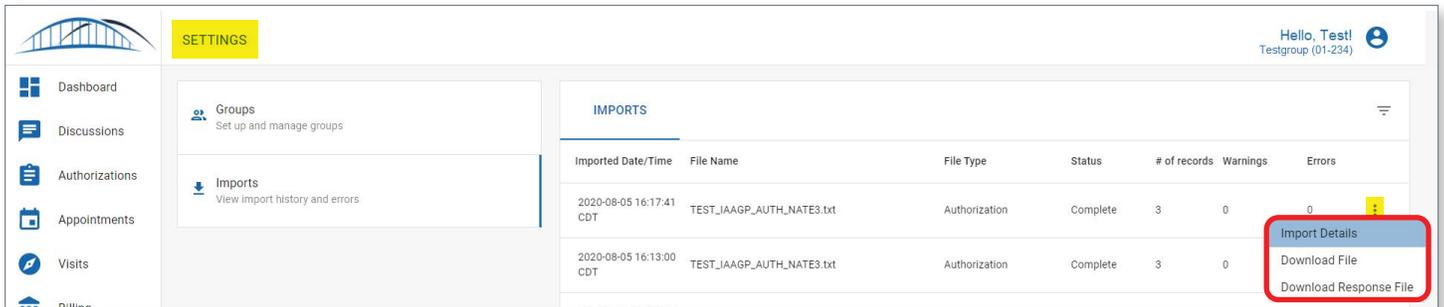
View the records and details of the import history in the **IMPORTS** tab of the Settings page.

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 Agency 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 **FILTERS** button in the top right and search by import date, file name, and/or file type.



To view details of the import, 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 dots** on the far right.

