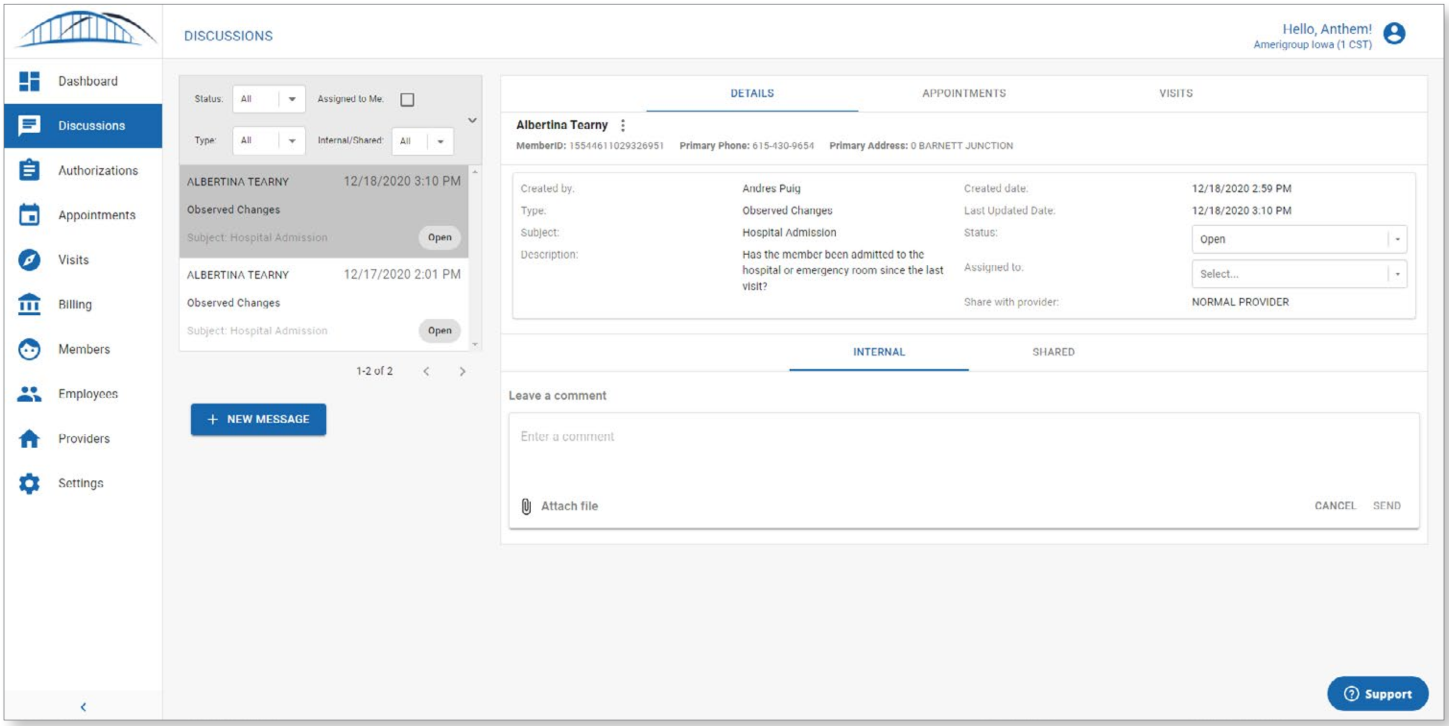
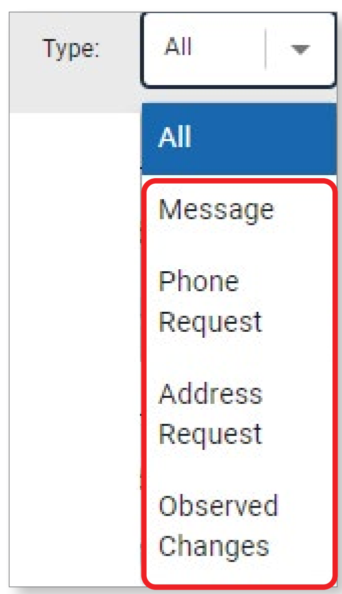
MANAGING DISCUSSIONS IN THE PAYER PORTAL

CAREBRIDGE

The **Discussions** tool in the CareBridge Payer Portal allows PASSE employees to communicate both internally within their organization and externally with provider agencies. The Discussions Page of the Payer Portal is designed to help PASSE employees manage and prioritize inbound communication from providers and act on critical tasks.



DISCUSSIONS TYPES



There are four different types of Discussions:

1. **Observed Changes** allow Caregivers to communicate any changes in the member's condition to PASSE. Observed Changes are logged as part of the survey Caregivers complete during a visit. When Observed Changes are logged, a shared Discussion is automatically generated and sent to the Discussions page of both the Provider and PASSE. You will want to monitor this regularly to ensure any urgent member issues are addressed.
2. **Address Requests** allow Providers to request a new or updated Member address from PASSE. When a provider modifies or adds an address in a member's details, a shared Discussion is automatically generated and sent to PASSE's Discussions page. PASSE must approve the request before the new address is active. If PASSE 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.

3. **Phone Requests** allow Providers to request a new or updated Member phone number from PASSE. When a provider modifies or adds a phone number in a member's details, a shared Discussion is automatically generated and sent to PASSE's Discussions page. PASSE must approve the request before the new phone number is active. If PASSE 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.
4. **Messages** are used for general-purpose communication either internally between PASSE employees or externally between PASSE and provider agency employees.

   To create a new Message:

   a. Click the **New Message** button below the list of Discussions, and the New Discussion dialog box will appear

   b. Complete the required fields

   c. Click **Send**

   Note that an Internal Discussion can be shared with a provider agency at any time.

FILTERING DISCUSSIONS

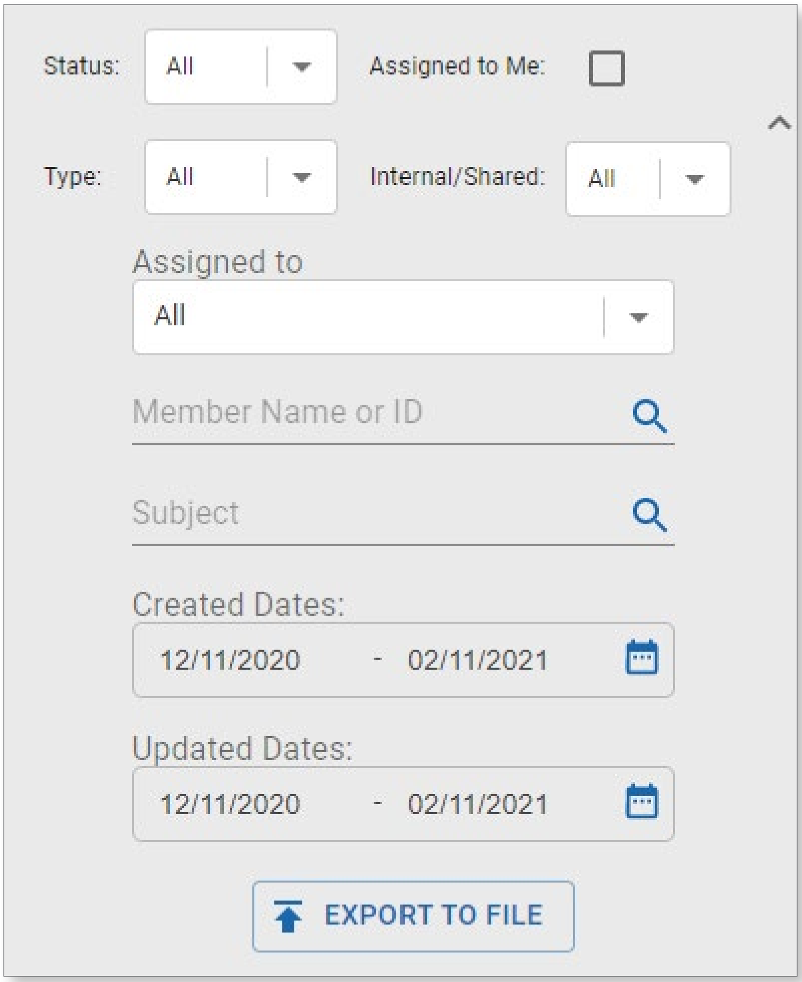
On the Discussions Page, you will see a list of all Discussions that is automatically ordered with the most recently active discussions first.

You can filter the Discussions list by:

- Status
- Assigned to
- Type
- Internal/Shared

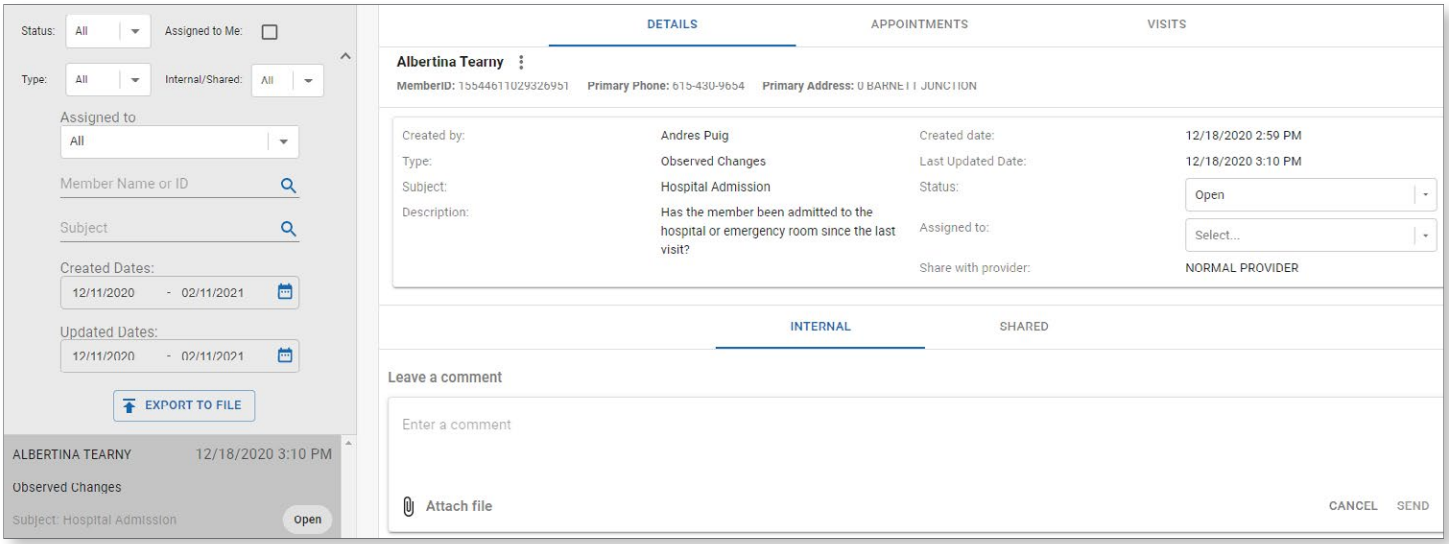
To expand the filter window, click the **expand arrow** to the right of the filters. This will allow you to search for a discussion by:

- Member name or ID
- Date range for when the discussions were created
- Date range for when the discussions were last updated



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:

1. **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.
2. **Assigned to:** To manage tasks across your organization, assign Discussions to an employee.
3. **Approve/Reject:** If manually responding to an address or phone change request, click the **Approve** or **Reject** button.
4. **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.
5. **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** tab 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.