

MANAGING DISCUSSIONS IN THE PAYER PORTAL



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

The screenshot shows a filter window for discussions. At the top right is an upward-pointing arrow. The filters are organized as follows:

- Status:** A dropdown menu currently set to "All".
- Assigned to Me:** A checkbox that is currently unchecked.
- Type:** A dropdown menu currently set to "All".
- Internal/Shared:** A dropdown menu currently set to "All".
- Assigned to:** A dropdown menu currently set to "All".
- Member Name or ID:** A search input field with a magnifying glass icon on the right.
- Subject:** A search input field with a magnifying glass icon on the right.
- Created Dates:** A date range selector showing "12/11/2020" to "02/11/2021" with a calendar icon on the right.
- Updated Dates:** A date range selector showing "12/11/2020" to "02/11/2021" with a calendar icon on the right.
- EXPORT TO FILE:** A button at the bottom with an upward-pointing arrow icon.

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.

The screenshot displays the 'Discussion Item Details' interface. On the left is a sidebar with filters: Status (All), Assigned to Me (checkbox), Type (All), Internal/Shared (All), Assigned to (All), Member Name or ID (search), Subject (search), Created Dates (12/11/2020 - 02/11/2021), and Updated Dates (12/11/2020 - 02/11/2021). Below these is an 'EXPORT TO FILE' button. The main content area has tabs for DETAILS, APPOINTMENTS, and VISITS. The 'DETAILS' tab is active, showing information for 'Albertina Tearny' (MemberID: 15544611029326951, Primary Phone: 615-430-9654, Primary Address: 0 BARNE T I JUNCTION). It includes fields for Created by (Andres Puig), Type (Observed Changes), Subject (Hospital Admission), and Description (Has the member been admitted to the hospital or emergency room since the last visit?). Other fields include Created date (12/18/2020 2:59 PM), Last Updated Date (12/18/2020 3:10 PM), Status (Open), Assigned to (Select...), and Share with provider (NORMAL PROVIDER). Below this is a section for 'INTERNAL' and 'SHARED' comments. The 'INTERNAL' tab is active, showing a 'Leave a comment' section with an 'Enter a comment' text box and an 'Attach file' button. At the bottom right are 'CANCEL' and 'SEND' buttons. A bottom status bar shows 'ALBERTINA TEARNY' with a timestamp '12/18/2020 3:10 PM' and a button labeled 'open'.

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.