SETTING UP YOUR OFFICE IN THE PROVIDER PORTAL

OVERVIEW

This Training Guide is intended to help the user understand how to best utilize the CareBridge Solution as a part of the day-to-day services that are provided. If at any point there are questions, our team is here to help: ncevv@carebridgehealth.com or **1 (855) 782-5976**.

If you have questions, our team is always here to help. Just email ncevv@carebridgehealth.com or call us at **1 (855) 782-5976.**

WHAT IS ELECTRONIC VISIT VERIFICATION (EVV)?

EVV is the use of technology to record the time and location of Caregivers/Direct Service Workers (DSWs) during Appointment Check-In and Check-Out. This method of verification has proven to provide an accurate accounting of Caregiver's/DSW's time while minimizing or eliminating inappropriate claims.

EVV affects Providers, Caregivers, Attendants, and Homemakers that deliver personal care, attendant care, and homemaker services (in 15-minute increments or daily) to Medicaid Members. This change is required by a federal rule called the *21st Century Cures Act*.

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 a company formed to improve processes that enable the care for people (Members) who receive Long-Term Services and Supports (LTSS). We offer LTSS solutions including an Electronic Visit Verification Solution that can be utilized via a smart phone, GPS-enabled tablet, landline, and web-based portal to record service delivery and facilitate day-to-day management of Members' appointments. CareBridge also supports a wide array of EVV aggregation solutions, allowing provider agencies to keep their current EVV solution while still sending required data back to the health plan or state.

SOLUTION OVERVIEW AND SETUP

OVERVIEW

The following will provide an overview of basic features and functions of the CareBridge Solution and help Provider Agency Employees learn how to set it up to enable delivery of services by Caregivers using the CareBridge Mobile Application.

CAREBRIDGE PROVIDER PORTAL

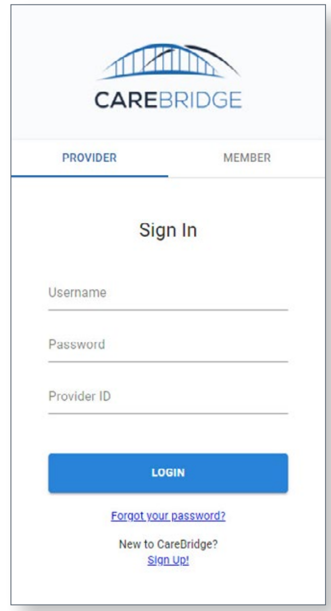
There are two components of the CareBridge Solution that will be utilized by Provider Agency Employees and Caregivers: the CareBridge Provider Portal and the CareBridge Mobile Application. The CareBridge Provider Portal is a web-based workflow tool that enables Agency Employees to view Authorizations, schedule Appointments, bill for completed Visits, and view dashboards to ensure operational excellence.

LOG INTO THE PROVIDER PORTAL

1. Navigate to https://nc.carebridgehealth.com/login.
2. New users can use the **Sign Up!** link to create a Password and access the Provider Portal. Password requirements are listed on the screen when the user creates their password.
3. After signing up, enter the **Username** and **Password**, and select **LOGIN** (Figure 1).

Note: The Provider Agency Admin user will need to create the Username for new users. The Agency's first Admins' username will be their email address and will be provided by CareBridge. See the 'Employees' section for more information.

Figure 1. Portal Login Page

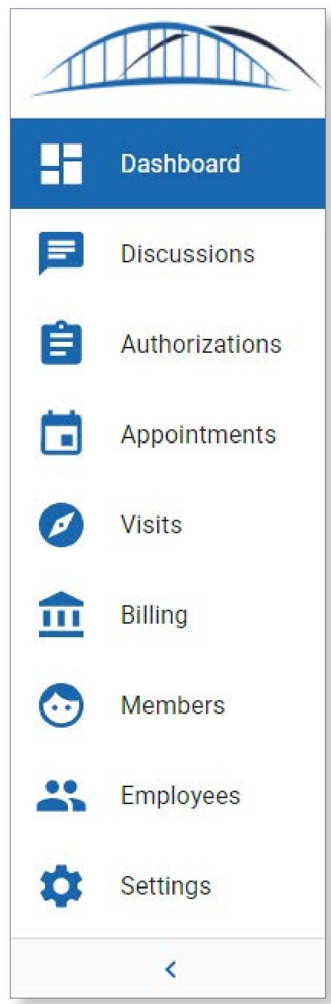


NAVIGATION

The following pages are available from the left navigation pane (Figure 2). Each of these pages will be discussed in more detail in later sections.

- **Dashboard:** Allows Provider Agency Employees to view key graphs and metrics related to operational efficiency.
- **Discussions:** Enables communication within the Provider Agency as well as between the Agency and Payer/Healthy Blue.
- **Authorizations:** Displays authorizations allowing Provider Agency Employees to acknowledge, assign, and schedule appointments.
- **Appointments:** Displays upcoming scheduled appointments allowing Provider Agency Employees to view early, late, and missed appointments.
- **Visits:** Allows Provider Agency Employees to view completed visits, pre-claim checks, and to submit claims.
- **Billing:** Enables Provider Agency Employees to manage end-to-end billing workflows.

Figure 2. Navigation Pane



- **Members:** Displays Members and associated information.
- **Employees:** Enables Provider Agency Administrators to manage their workforce by creating and modifying users.
- **Settings:** Allows Provider Agency Employees to configure certain aspects of the CareBridge Solution.

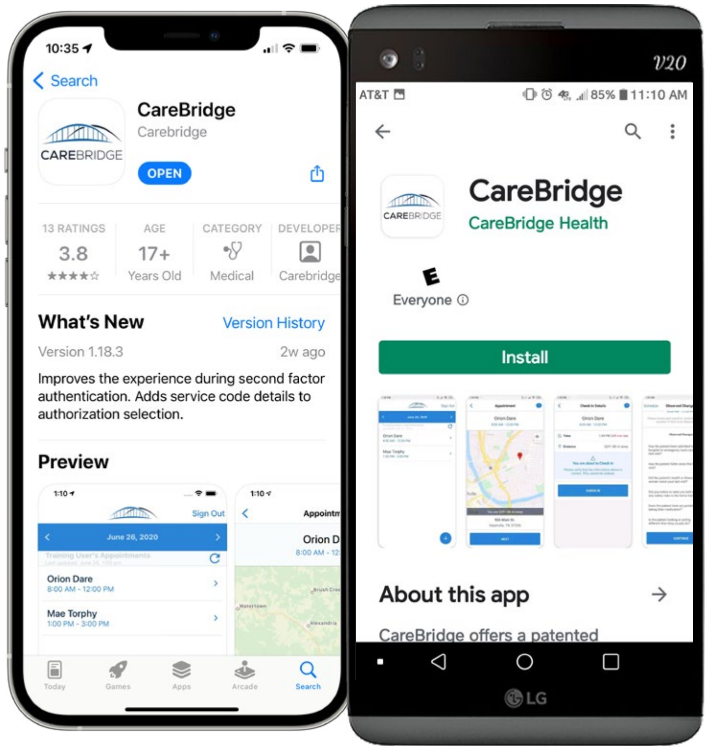
CAREBRIDGE MOBILE APPLICATION

The second component of the CareBridge Solution is the CareBridge Mobile Application. The mobile app is available on Apple and Android smart devices and can be used by Caregivers to view their schedule, Check-In, Check-Out, and complete visit documentation.

DOWNLOAD

The CareBridge Mobile Application is a free download available on the iOS App Store and the Android Google Play Store (Figure 3).

Figure 3. Download



The application requires location services permission at installation. (***Please note:*** The Caregiver's location is only captured during the Check-In and Check-Out process.)

The application supports current versions of both operating systems.

The application supports English, Spanish, and Russian languages.

SET UP

Once the application is downloaded onto the device, the Caregiver can open it and view the Team Setup screen. After choosing their state and entering their Provider ID, they will be directed to the login/sign up screen (Figure 4). By clicking the **SIGN UP** button below the blue **LOGIN** button, the new user will begin the sign up process (Figure 5).

Figure 4. Setup screen

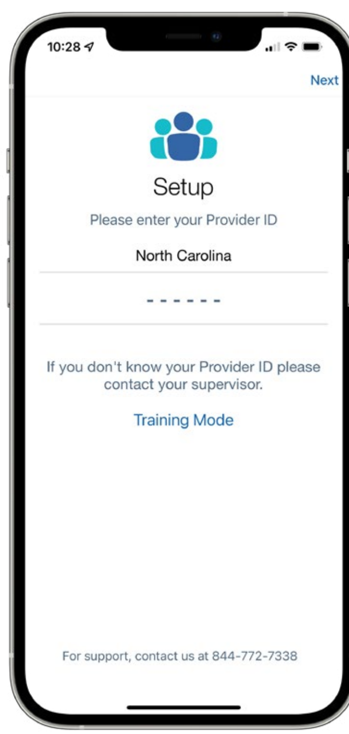
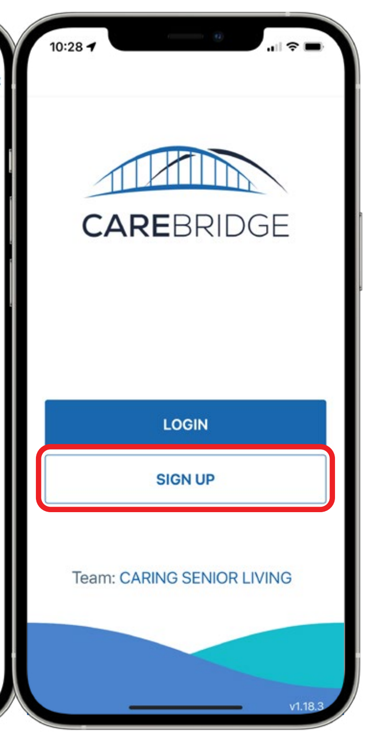


Figure 5. Sign Up screen



LOGIN

When the user logs in, they will be prompted for a **Provider ID**, **Username**, and **their 8-digit Password**. After that, the Appointment Schedule screen is displayed. Please see the 'Check-In & Check-Out' section for additional information about how to utilize the mobile application in EVV workflows.

CREATING AND MODIFYING EMPLOYEES

The 'Employees' page in the CareBridge Provider Portal allows Provider Agency Administrators to view, modify, and create new employee records.

VIEW EMPLOYEES

Navigate to the 'Employees' page to see a tabular view of all Employees (office employees and Caregivers) that are currently listed in the Provider Portal. (Figure 6) This table can be filtered and sorted with several parameters by selecting the **expand arrow** in the **FILTERS** component or the **Sort by** drop-down at the top left of the table. (Figure 7)

Figure 6. Employees page

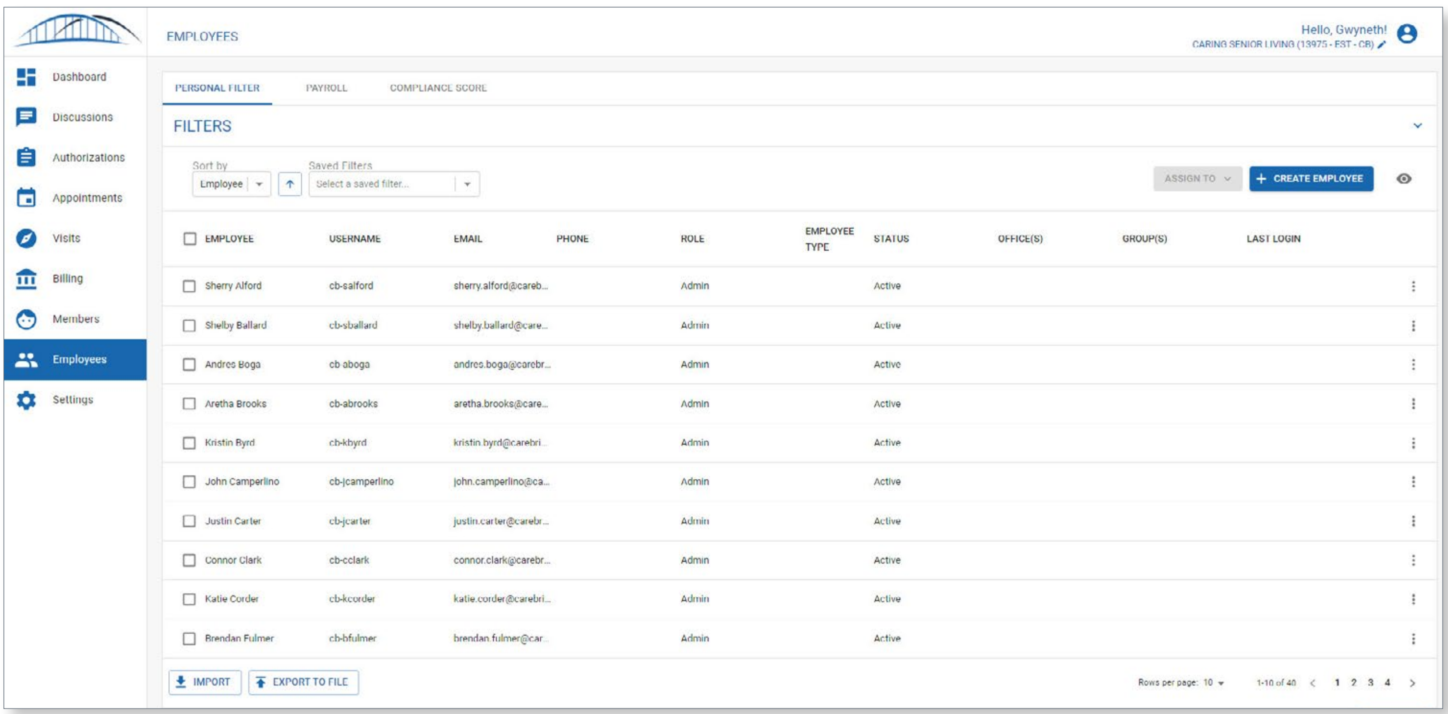
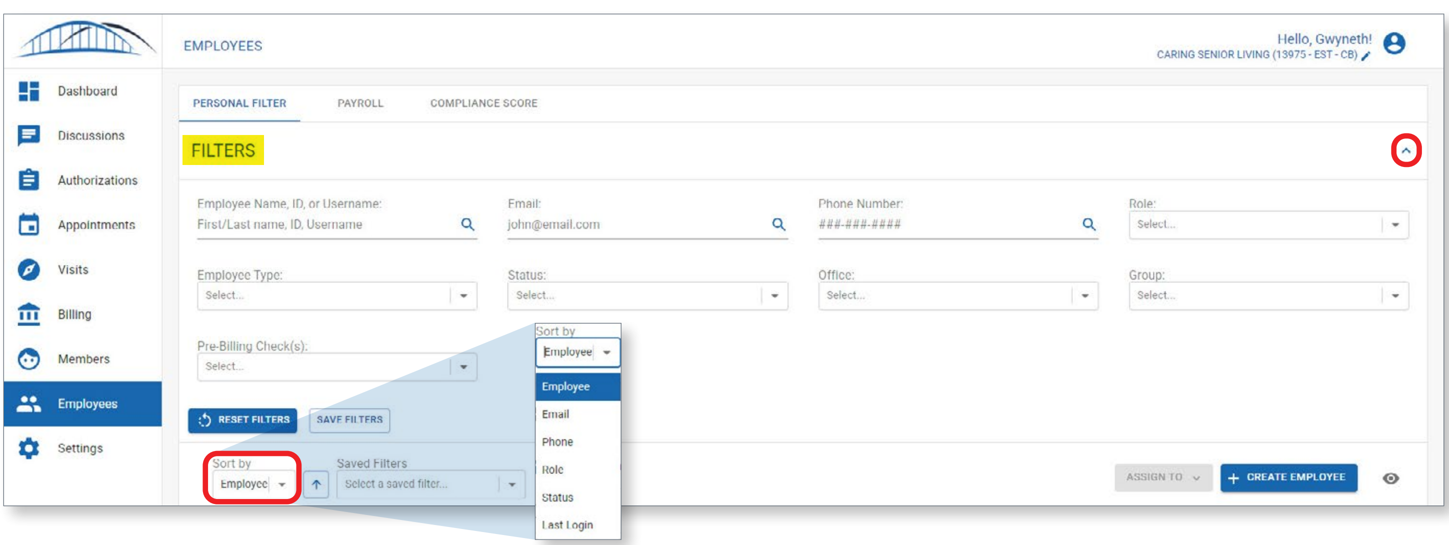


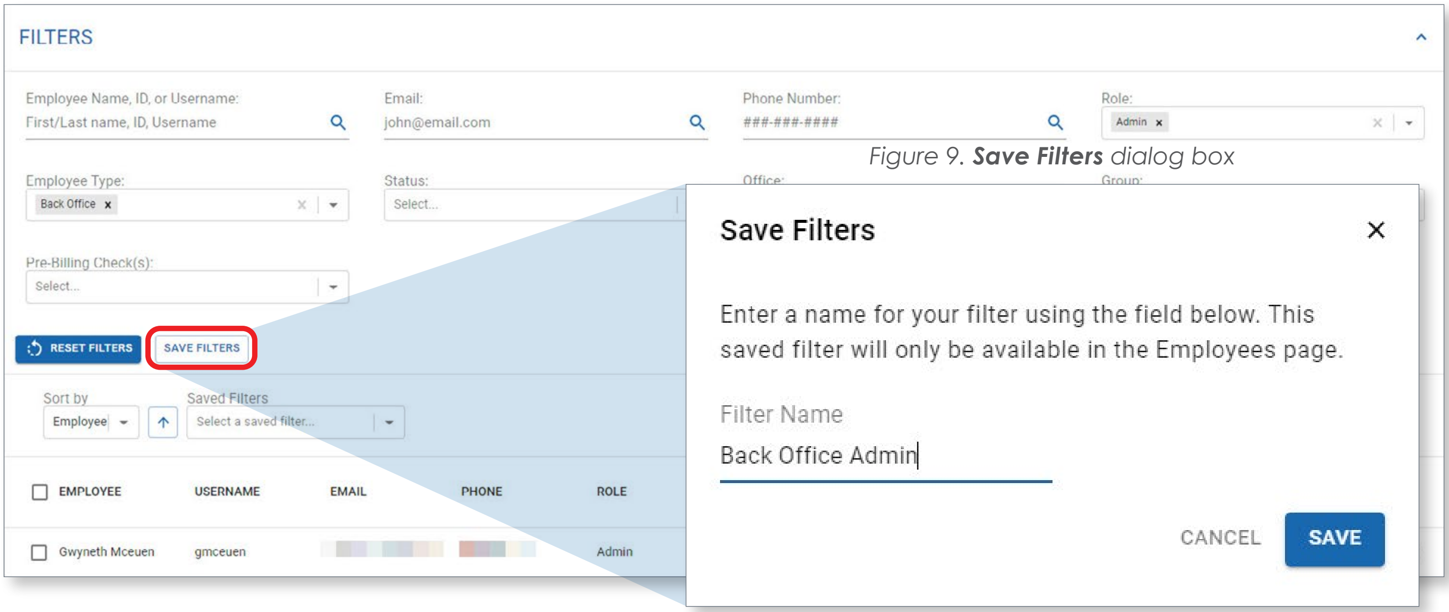
*Figure 7. Employee page **FILTERS***



Filters that are chosen by the user to find data may also be saved for future searches. To do this, click the **SAVE FILTERS** button at the bottom of the **FILTERS** area. (Figure 8)

*Figure 8. **SAVE FILTERS** button*

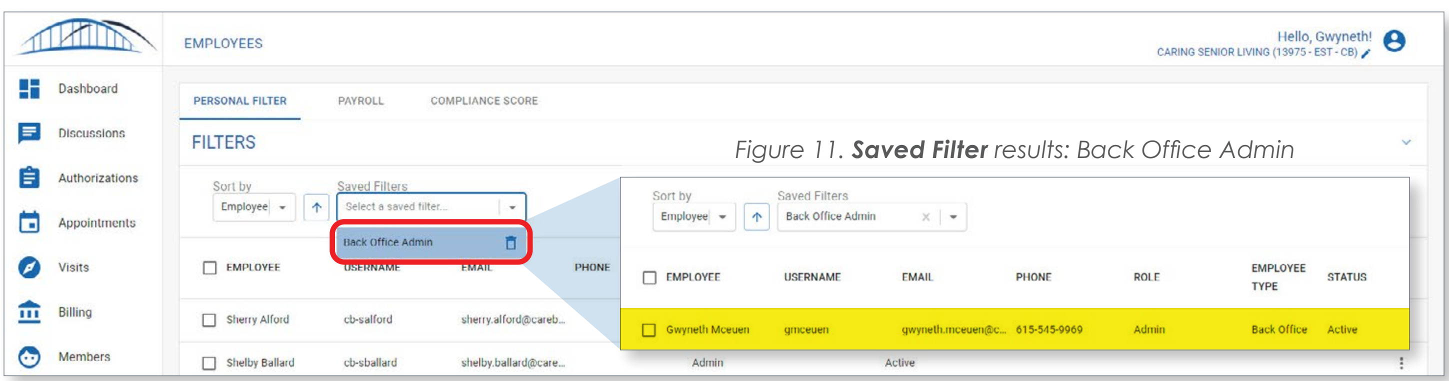
*Figure 9. **Save Filters** dialog box*



When the **Save Filters** dialog opens, the user is asked to name their custom filter for future reference. (Figure 9) Once it's saved, the user can select their customized filter anytime from the **Saved Filters** drop down menu located to the right of the **Sort by** menu. (Figures 10 & 11)

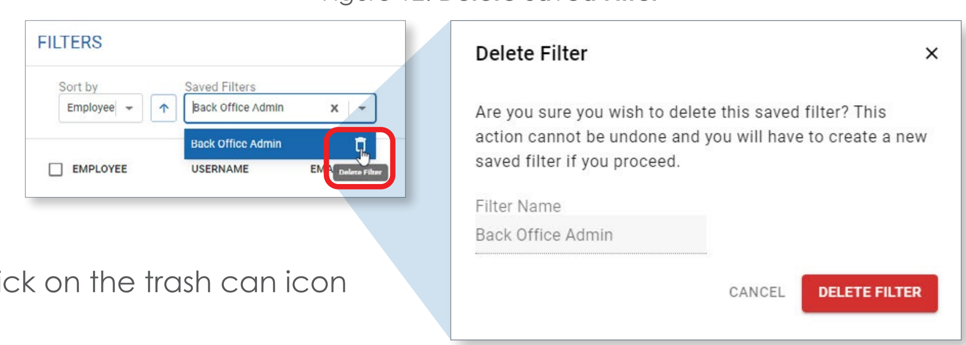
*Figure 10. **Saved Filters** drop-down menu*

*Figure 11. **Saved Filter** results: Back Office Admin*



Saved filters are specific to the user that created them and the page(s) they were created on. Users can update and delete their filters as necessary. To update, the user must actually save a new filter. To delete a filter, the user must select it and click on the trash can icon in the **Saved Filters** list. (Figure 12)

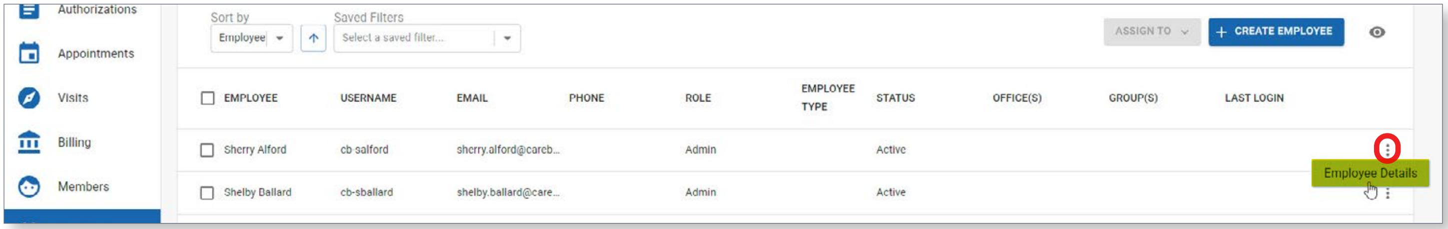
*Figure 12. **Delete Saved Filter***



VIEW EMPLOYEE DETAILS

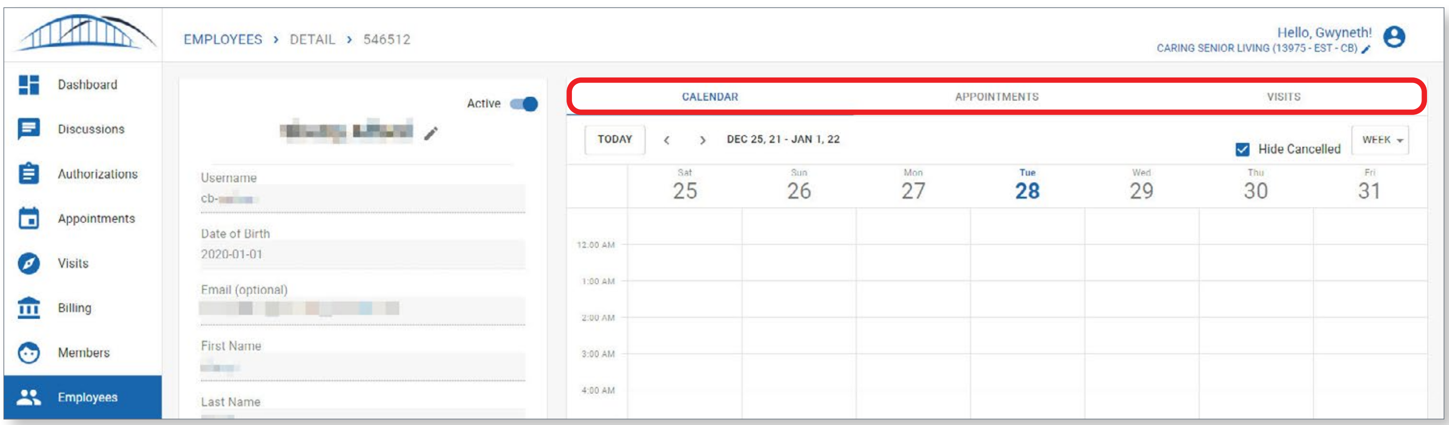
To view more details about an Employee, select the **menu icon (three dots)** (Figure 13) on the right side of the row for the Employee and select Employee Details.

*Figure 13. Employees page **Menu Icon (three dots)***



From the 'Employee Details' page (Figure 14), users can view Employee demographic info, a **CALENDAR** view of visits, upcoming **APPOINTMENTS**, and completed **VISITS** for the Employee.

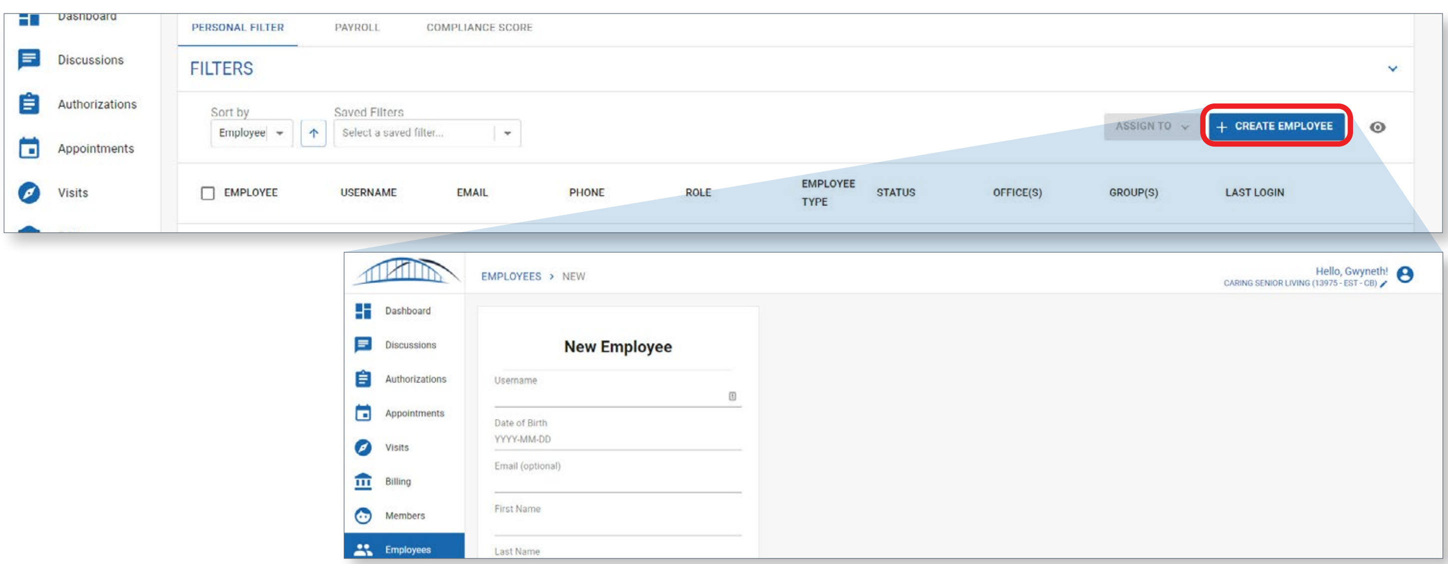
*Figure 14. **Employee Details** page*



CREATE NEW EMPLOYEES

Administrators can create new employees (office employees or Caregivers) individually or through bulk import. To create employees individually, select the **+ Create Employee** button at the top of the Employees table (Figure 15).

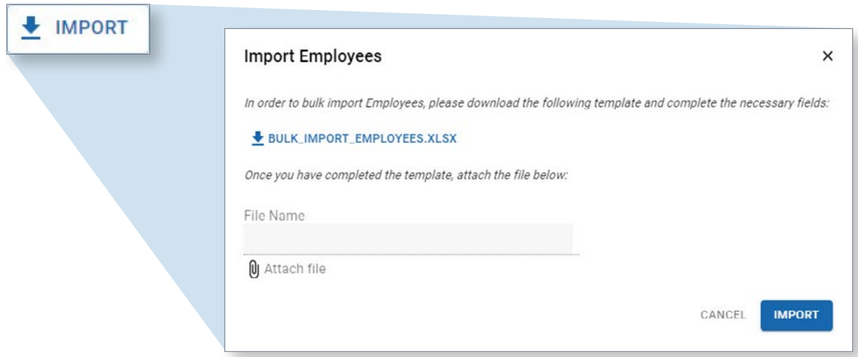
*Figure 15. **+ CREATE EMPLOYEE***



To create employees in bulk, click the **IMPORT** button at the bottom left of the Employees page, download the Excel template, fill out the form, then upload it by clicking the **IMPORT** button (Figure 16).

Note: If the information you enter in the spreadsheet template is inaccurate, you must update the profiles within the system. The spreadsheet ***cannot*** simply be edited and re-imported.

*Figure 16. **IMPORT** button & **Bulk Import** dialog*



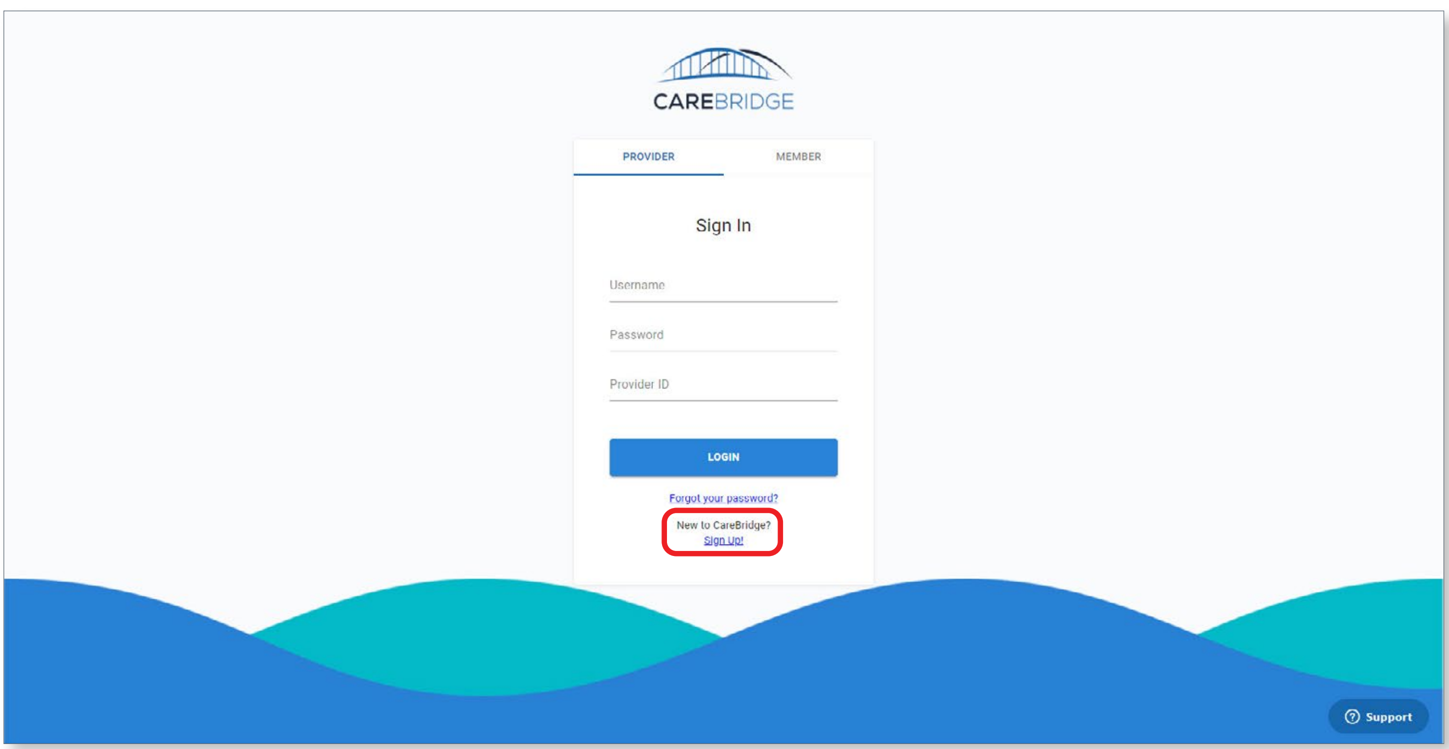
Once the Portal Administrator has populated the Provider Portal, Employees may begin logging in.

LOGIN

To create an employee profile, the Agency Administrator should enter the **Username** and **Provider ID** for the new employee (see the **+ Create Employee** page - Figure 15) and select **SUBMIT**. *The **Admin is responsible** for communicating the **Username*** (typically the user's first initial of their first name and their last name - with no spaces - or their email address) *and **Provider ID** to the employee*. Selecting **SUBMIT** generates the new employee's **Sign Up code.** The **Sign Up code** is immediately sent to the new employee via text message or email. They are then able to login and reset their password. ***Please note:*** The Sign Up code expires in 20 minutes.

After their Provider Portal profile has been created by the Agency Administrator, new employees must navigate to https://nc.carebridgehealth.com. They can then use the **Sign Up!** link to create their login (Figure 17).

Figure 17. Login as a new employee



ENTER PORTAL SIGN UP CODE AND CREATE NEW PASSWORD

After clicking the **New to CareBridge? Sign Up!** link, the new employee must enter their **Username** and **Provider ID** on the **Enter Your Username** screen. (Figure 18) This will cause the users **Sign Up passcode** to be generated.

Once the used clicks **SUBMIT**, the security passcode will be sent to them via text message or email. If the new employee does not receive a **Sign-Up passcode**, one can be generated in the portal by an Agency Administrator. To regenerate a **Sign Up passcode**, the Agency Administrator may open the Employee's Employee Details page and click on the **pencil icon**. Then scroll down to the **Passcode** field and click **Generate**. This will send the employee a new **Sign Up passcode** that is good for 20 minutes.

*Figure 18. Enter **Username** and **Provider ID***

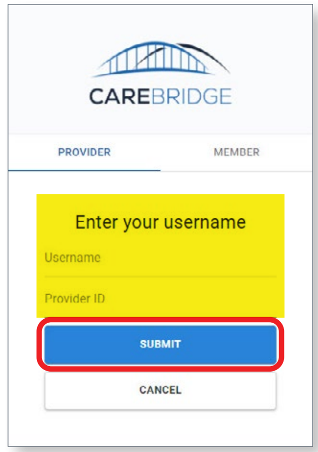
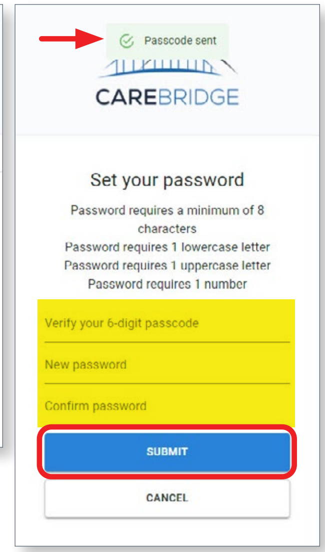


*Figure 19. Set new **Password***

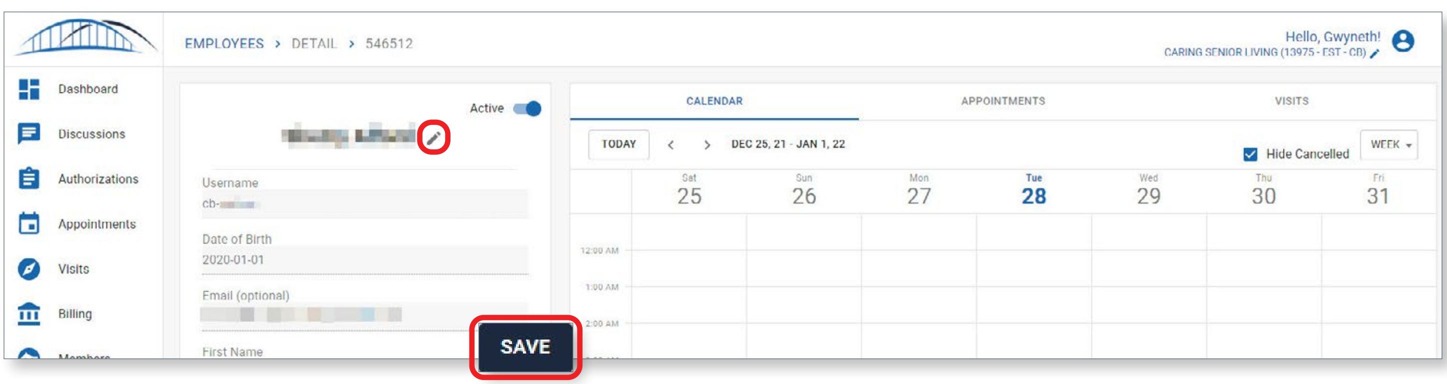


The new employee will then see the **Set Your Password** screen. (Figure 19) After typing in their **Sign Up passcode**, they must create a **Password** that is at least 8-digits long, contains one lower case letter, one capital letter, and one number. Then they must **Confirm** the password and **SUBMIT** (Figure 14). The new user is now logged into the Provider Portal.

MODIFY EMPLOYEE DETAILS

To modify Employee Details, select the **pencil icon** next to the Employee's name on the Employee Details page (Figure 20). The Employee Details fields will become editable. Select the **SAVE** button at the bottom to save changes.

*Figure 20. **Employee Details** pencil icon and **SAVE** button*



In addition to demographic information, the following are critical in setting up the Employee's profile:

- **Username:** This Username will need to be communicated to the new Employee for them to sign up for the Provider Portal or Mobile Application. For ease of communication, we recommend using either the first initial of the user's first name plus their last name - with no spaces - or the user's email address. This is a required field.
- **Date of Birth:** Used for billing and security purposes.

> **TECH TIP**
> Although the **Email** and **Mobile Phone Number** fields are listed as optional, *the Agency Admin must fill out at least one of these fields.*

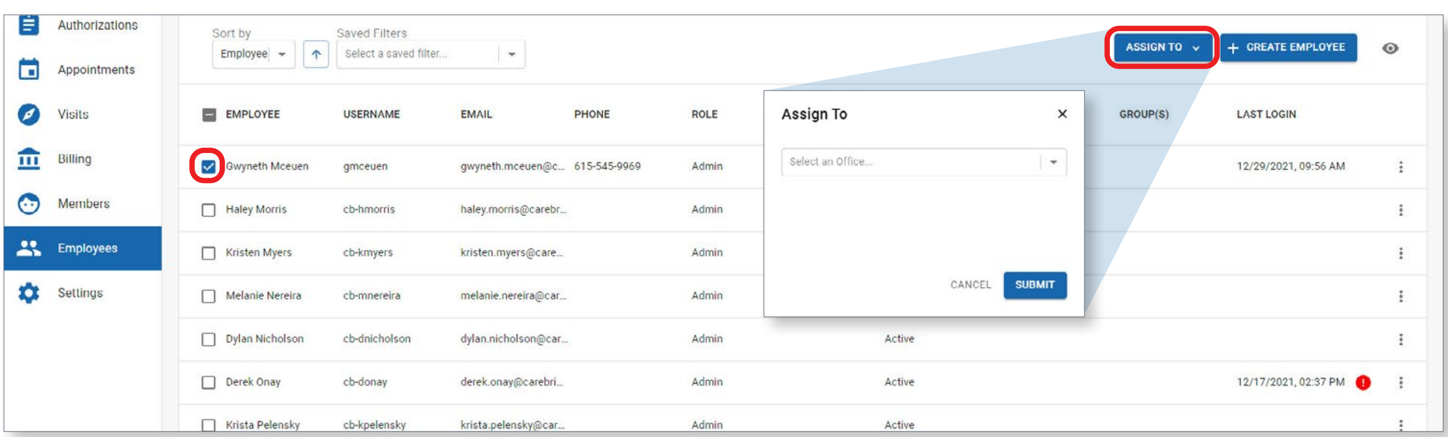
- **Email (optional):** If the user would like to receive access, multi-factor authentication, and recovery codes via email, enter a valid email address. This field is typically used for office employees.
- **Mobile Phone Number (optional):** If the user would like to receive a text message with the multi-factor authentication codes to sign up and be able to sign into the CareBridge application, enter a valid smart phone number. (Text messaging or data rates apply.) This field is typically used for Caregivers.
- **Worker Rate:** Worker Rate is used to accurately calculate payroll reports.
- **Interactive Voice Response (IVR) PIN:** If the Employee would like to utilize IVR (see 'Check-In & Check-Out' section) a unique three-five (3-5) digit IVR PIN will need to be entered. When assigning the IVR PIN, please remember that the Caregiver will be entering this number frequently.
- **Role (optional):** Used to differentiate one type of Employee from another. The Provider Portal user roles are as follows:
  - **Admin:** has no restrictions on what they are able to view or take action on. Each agency needs at least one Admin, but additional users can be in the Admin role.
  - **Admin - Office:** has the same permissions as the Admin, but would be limited to only the assigned offices*.
  - **Employee:** typically used for field staff using the Mobile App (aka caregiver, personal care worker) or employees requiring limited administrative access to the Provider Portal
  - **Employee - Office:** has the same permissions as the Employee role, but would be limited to only their assigned offices*.

*Offices are used to group members and employees/caregivers by a common attribute.

ASSIGN EMPLOYEES TO OFFICES AND/OR GROUPS

Employees (Admins and/or Caregivers) and Members can be assigned to offices or groups to better drive the scheduling of Caregivers to Members and to be able to run reports by agency location or employee type. Select one or more Employees/Caregivers using the check box to the left of the Employee name. Select the Assign To button in the top right of the page (Figure 21) to assign the selected Employees to an Office or Group. For more information on Offices and Groups, see the 'Settings' section.

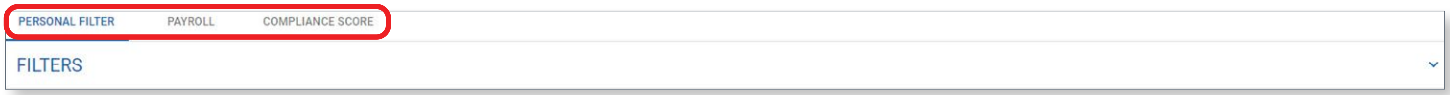
*Figure 21. Employee **ASSIGN TO** drop-down menu*



EMPLOYEE REPORTS

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

Figure 22. Employees page reports



In addition to the **PERSONAL FILTER**, there are two **Reports** (Figure 22) that have predefined filters to help quickly navigate to useful Employee data.

- **PAYROLL:** This report returns payroll data for a given time for each Employee based on completed Visits in that period.
- **COMPLIANCE SCORE:** This report returns a list of all Employees sorted in ascending order by Compliance Score. Compliance Score is the percentage of EVV Visits that are compliant, (defined as EVV or IVR visits) relative to the total number of Visits. Examples of non-compliant Visits are manual entries, early visits, late visits, or missed visits.

To export any of the data on the Employees page to a **PDF**, **XLS**, or **CSV** file, select the **EXPORT TO FILE** button on the bottom of the page (Figure 23). Upon selecting the file type, the document will begin downloading and will be available from the Settings Page on the left navigation pane under the **DOCUMENTS** sub-tab. For more information, see the 'Settings' section.

*Figure 23. **EXPORT TO FILE** button and menu*