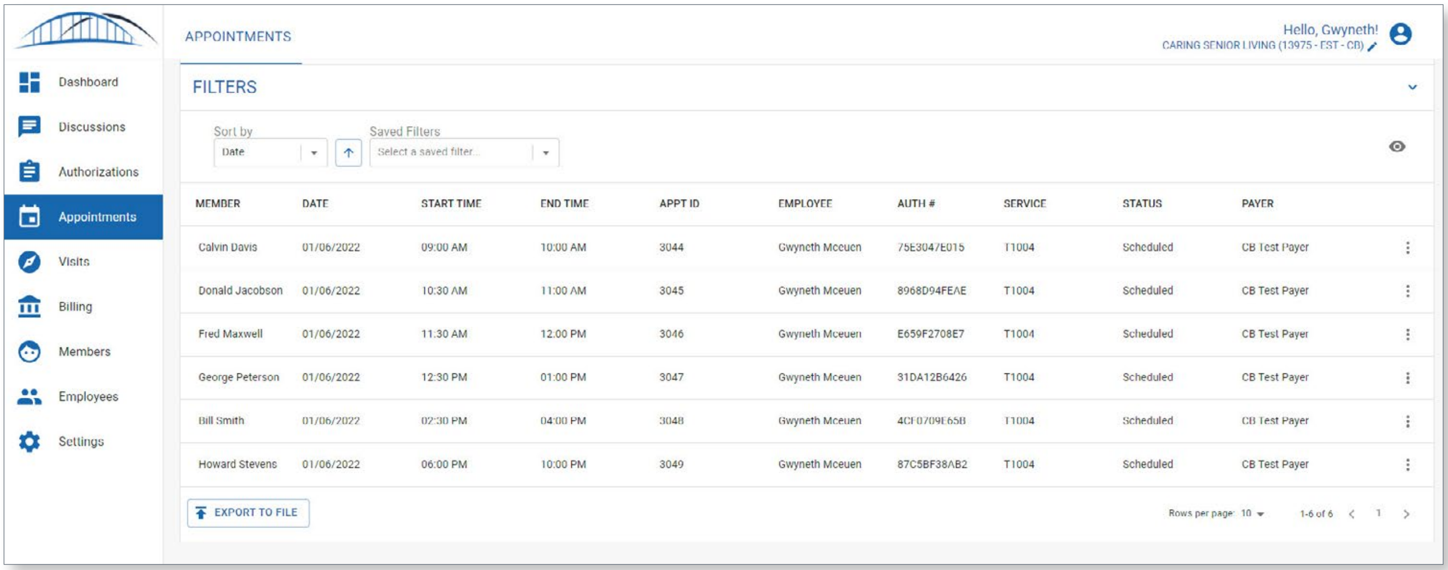
SCHEDULING APPOINTMENTS IN THE PROVIDER PORTAL

The Appointments page in the CareBridge Provider Portal allows Provider Agency office employees to view upcoming, scheduled appointments (if any) as well as identify and act upon early, late, or missed visits (Figure 44).

Figure 44. Appointments page



BEFORE SCHEDULING APPOINTMENTS

Before an appointment can be scheduled, you must acknowledge receipt of the authorization from the Payer/Healthy Blue in the CareBridge Provider Portal. All unacknowledged authorizations are labeled "Received."

TO ACKNOWLEDGE AUTHORIZATIONS:

1. Navigate to the 'Authorizations' page.
2. Click on the **UNACKNOWLEDGED** tab.
   a. To locate a specific authorization, use the **FILTERS** button at the top of the page.
3. Click on the Received status and select **Acknowledge**.
   a. If you cannot service an authorization, you must contact the Payer/Healthy Blue directly.
   b. You must respond to every authorization sent to your Provider Agency by Healthy Blue. Please note that the authorization will continue to appear until CareBridge receives an updated file from Healthy Blue.

Once you have acknowledged an authorization, you can schedule an appointment for that authorization.

SCHEDULING APPOINTMENTS IN THE PROVIDER PORTAL

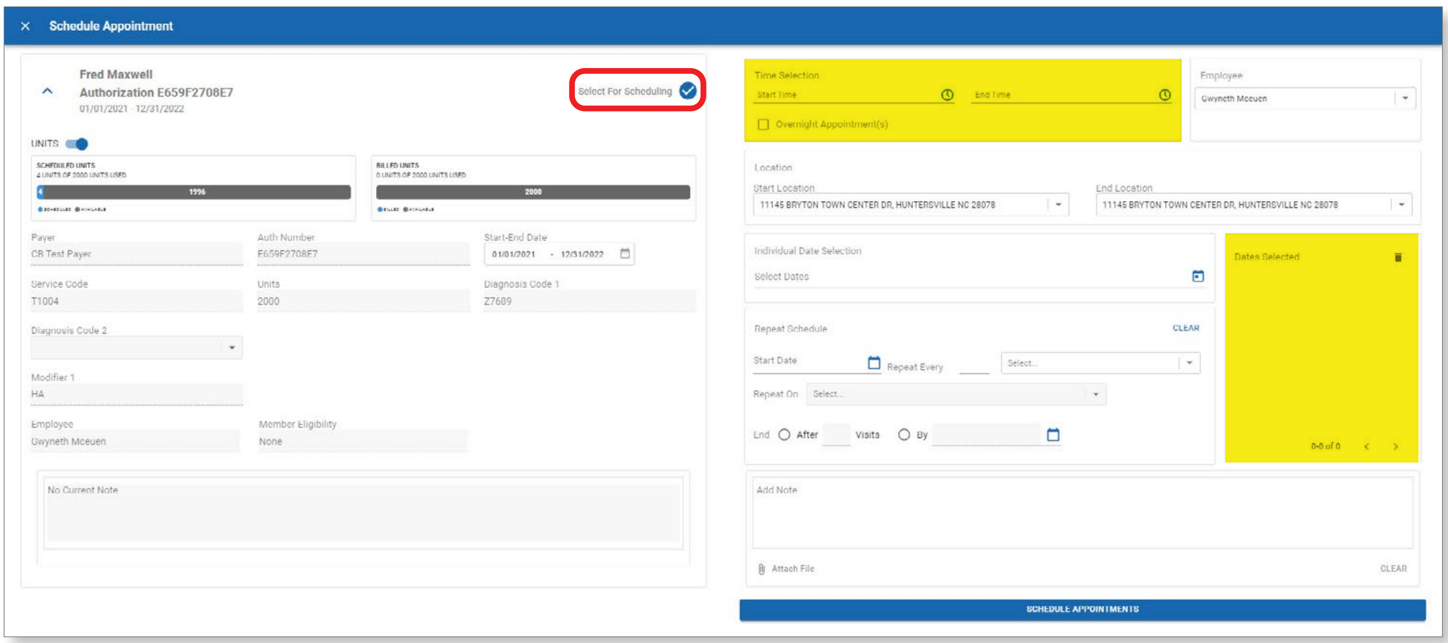
For appointments to appear on the Appointments page, they must first be scheduled. Scheduling appointments is required in North Carolina. To schedule an appointment, first navigate to the Authorizations page and select the **calendar icon** next to the Authorization for which it is necessary to schedule an appointment (Figure 45).

*Figure 45. Authorizations page **Calendar Icon***

MEMBER	UPDATED DATE	START DATE	END DATE	UNITS	AUTH #	SERVICE	MODIFIERS	SCHEDULED UTILIZATION %	BILLED UTILIZATION %	PAYER	STATUS	EMPLOYEE
Fred Maxwell	01/05/2022	01/01/2021	12/31/2022	2000	E659F2708E7	T1004	HA	0.2	0	CB Test Payer	Acknowledged	Gwyneth Mce...

Upon selecting the **calendar icon**, the user is taken to the Schedule Appointment screen (Figure 46).

Figure 46. Schedule Appointment screen



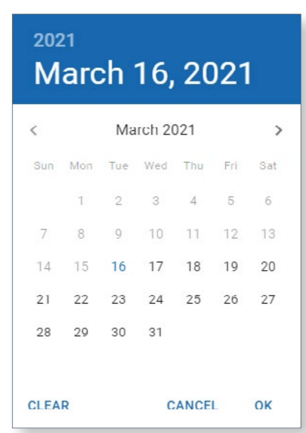
On the left side of the Schedule Appointment dialog, view any current authorizations for the Member and choose the authorization needed to schedule appointments by clicking the **SELECT FOR SCHEDULING** check box.

On the right side of the dialog, the **Start Time** and **End Time** details can be added for all the upcoming appointments being created. If you have multiple appointments with different start/end times, you will need to schedule them individually.

To select dates for appointments, choose one of the following two options:

- Click the **calendar icon** in the 'Individual Date Selection' card to select individual dates for appointments. The user can individually select as many dates as necessary from the **Individual Date Selection Calendar** (Figure 47). Once the dates are selected, they will display in the 'Dates Selected' card (Figure 48).

Figure 47. Individual Date Selection Calendar



- Recurring appointments can be selected using the 'Repeat Schedule' card by entering the following fields:
  - **Start Date:** This is the date on which the repeated schedule will begin.
  - **Repeat Every:** This is the frequency with which the repeated schedule will generate appointment dates. Example: Repeat Every 3 Weeks.
  - **Repeat On:** These are the days of the week that the repeated schedule will generate appointment dates.
  - **End:** Choose to end the repeated schedule after a certain number of visits or after a certain date by selecting one of the radio buttons.

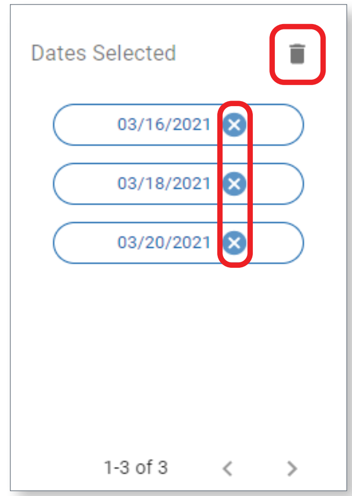


Figure 48. Dates Selected card

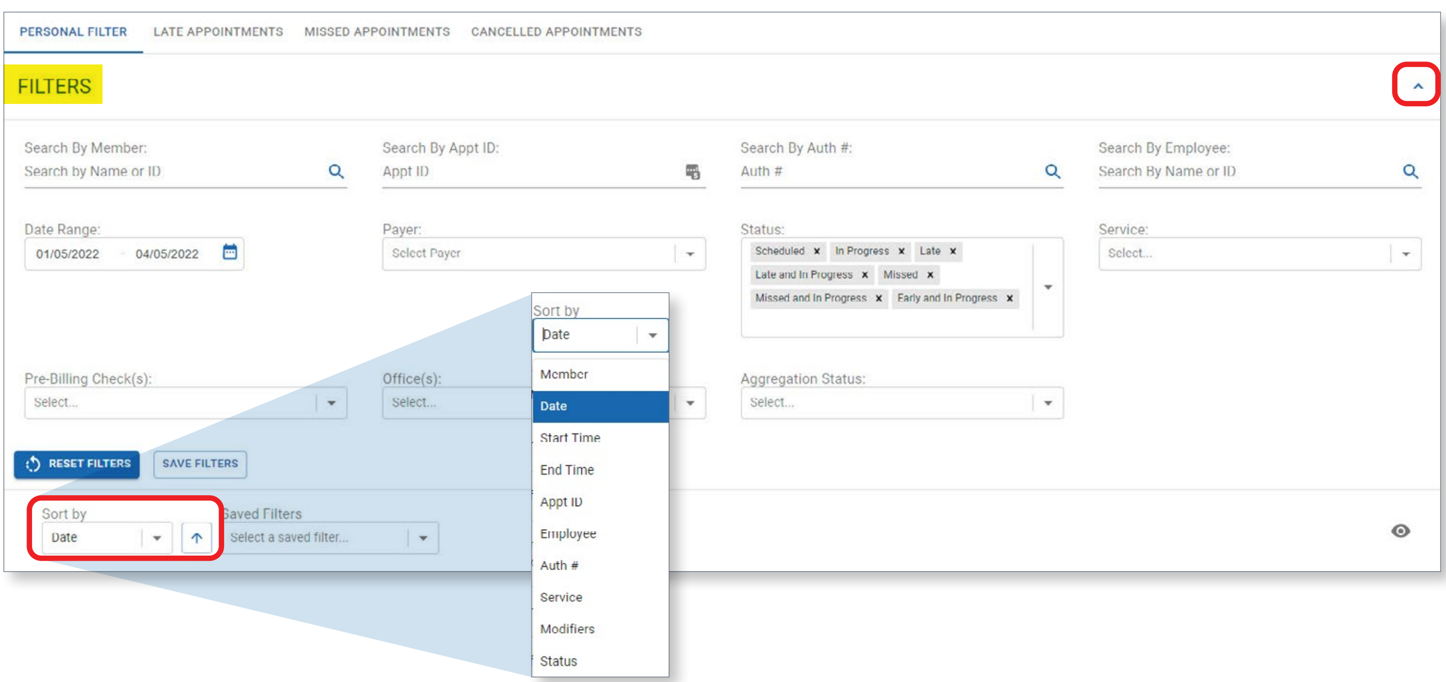
Upon completion of the above fields, the 'Dates Selected' card (Figure 48) populates with appropriate dates based on the Repeat Schedule fields. The user can choose to remove any previously selected dates by clicking the **X** icon next to the date in the 'Dates Selected' card or click on the **Trash Can** icon to delete all the dates.

Once the desired dates are displayed in the 'Dates Selected' card, select the **SCHEDULE APPOINTMENTS** button at the bottom of the screen to generate newly scheduled appointments.

VIEW APPOINTMENTS

On the Appointments page, the user can see a tabular view of all Appointments that are currently scheduled. 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 49).

*Figure 49. Appointments **FILTERS** and **Sort by** options*



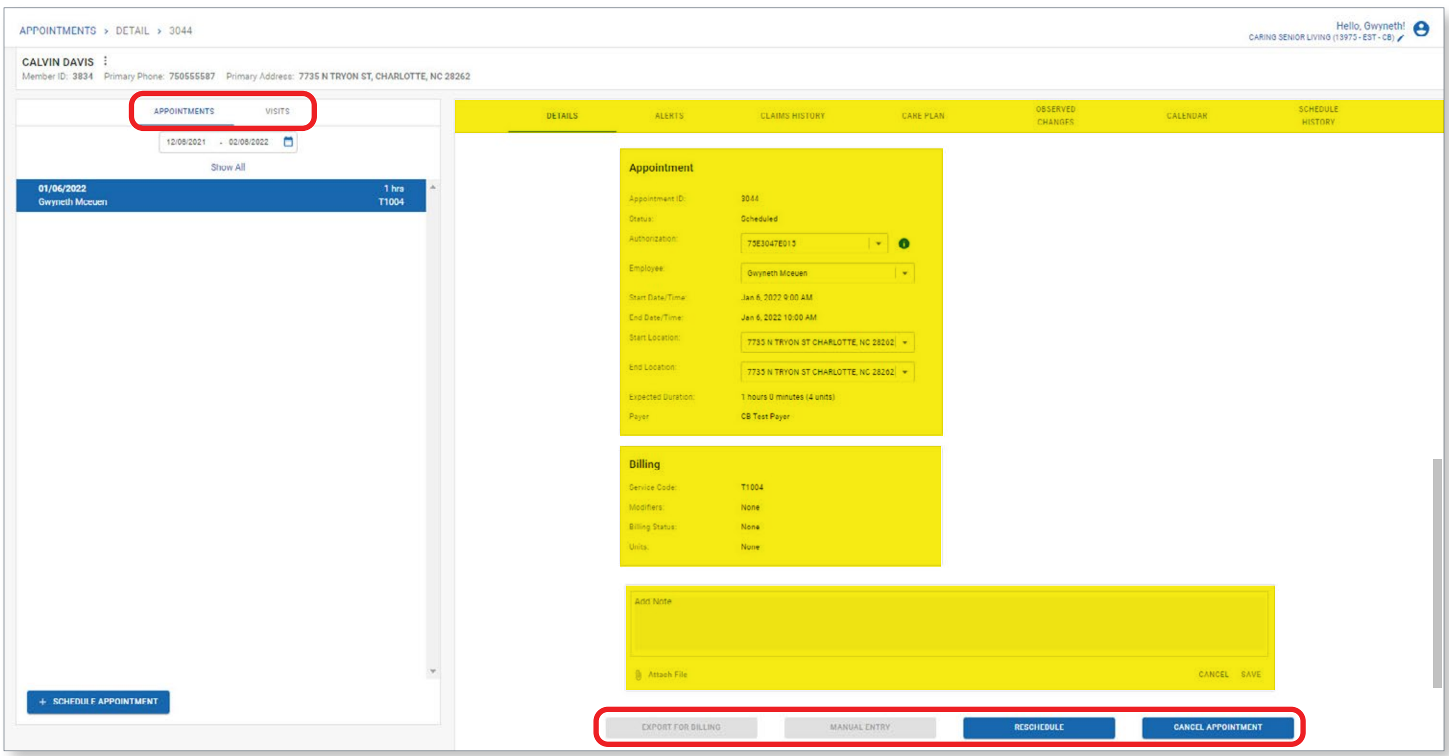
APPOINTMENT DETAILS

To view more details about an Appointment, select the **menu icon (three dots)** on the right side of the row for the Appointment and then select **Appointment Details** (Figure 50).

Figure 50. Appointment Details

From the Appointment Details page (Figure 51), associated data in the 'Appointment' and 'Billing' cards can be found, as well as a 'Notes' card to add notes and attach files to the appointment.

Figure 51. Appointment Details page



A user may 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 **CARE PLAN** by selecting each of those options from the tabs on the right.

From the bottom of the Appointment Details page, the user may choose to utilize four actions:

- **EXPORT FOR BILLING:** export the selected appointment for billing.
- **MANUAL ENTRY:** for visits that were not captured in the Mobile App or IVR, a Provider Agency Administrator can complete a **Manual Entry**. (See the 'Visits' section for more information about Manual Entries.)

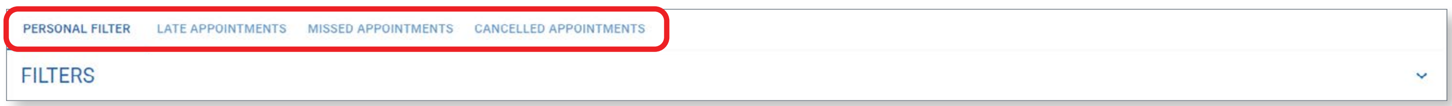
- **RESCHEDULE:** for the appointment selected, choose a new date, or modify any of the appointment details by selecting **RESCHEDULE**.
- **CANCEL APPOINTMENT:** For upcoming appointments, choose to cancel and provide a cancellation reason.

APPOINTMENTS REPORTS

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

In addition to the **PERSONAL FILTER**, there are three reports that have predefined filters to help quickly navigate to useful Appointments data (Figure 52).

*Figure 52. Appointments page **Personal Filter** and **Reports***



- **LATE APPOINTMENTS:** This report returns a list of 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:** This report returns a list of 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.
- **CANCELLED APPOINTMENTS:** This report returns a list of all appointments that have been cancelled.

To export any of the data on the Appointments page to a **PDF**, **XLS**, or **CSV** file, select the **EXPORT TO FILE** button on the bottom of the page (Figure 53). Upon selecting the file type, the document will begin downloading and will be available from the Settings page under the **DOCUMENTS** sub-tab.

*Figure 53. **EXPORT TO FILE** button and menu*