

TRAINING GUIDE CAREBRIDGE PROVIDER PORTAL ELECTRONIC VISIT VERIFICATION (EVV)



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INTRODUCTION

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: <u>arevv@carebridgehealth.com</u> or **1 (844) 922-2584**. If you have questions, our team is always here to help. Just email: <u>arevv@carebridgehealth.com</u> or call us at (844) 922-2584

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 beneficiaries. 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 7 items:

- Type of service performed
- Location of the service

• Time the service begins

• Time the service ends

- Beneficiary receiving the service
- Caregiver providing the service
- Date of the service

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 mobile phone, 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 the basic features and functions of the CareBridge Solution and help Agency Employees - who will be Provider Portal users at an administrative level - learn how to set-up CareBridge's Solution to enable delivery of services by caregivers - using the CareBridge mobile application - for members.

CAREBRIDGE PROVIDER PORTAL

There are two components of the CareBridge Solution that will be utilized by Agency Employees and caregivers: the CareBridge Provider Portal and the CareBridge Mobile Application. First, 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.

LOGIN

- 1. Navigate to https://ar.carebridgehealth.com/
- 2. Enter username and password, select LOGIN (Figure 1).
- 3. New users can use the **Sign Up!** link to create a password and access the Provider Portal. (Note: The Agency Admin user will need to create the username for new users. See 'Employees' section for more information.)

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 of this Training Guide.

- **Dashboard:** Allows Agency Employees to view key graphs and metrics related to operational efficiency.
- **Discussions:** Enables communication within the Agency as well as between the Agency and Payers (PASSE).
- **Authorizations:** Displays authorizations allowing Agency Employees to acknowledge, assign, and schedule appointments.
- **Appointments:** Displays upcoming scheduled appointments allowing Agency Employees to view early, late, and missed appointments.
- **Visits:** Allows Agency Employees to view completed visits, pre-claim checks, and to request claims.
- **Billing:** Enables Agency Employees to manage end-to-end billing workflows.
- **Members:** Displays Members and associated information.
- **Employees:** Enables Agency Administrators to manage their workforce by creating and modifying users.
- **Settings:** Allows Agency Employees to configure certain aspects of the CareBridge Solution.



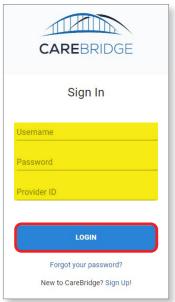
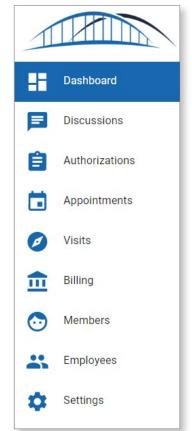


Figure 2. Left Navigation



CAREBRIDGE MOBILE APPLICATION

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

DOWNLOAD

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

LOGIN

Once the application is downloaded onto the device, the user can open it and view the login screen. The user will be prompted for a **Provider ID**, **Username**, **Password**, and **Birth date** if it is not already in their

Employee Details. Once logged in, today's Appointment Schedule is displayed - **if** the caregiver has scheduled appointments. Please see the <u>Check-In & Check-Out</u> section for additional information about how to utilize the mobile application in EVV workflows.

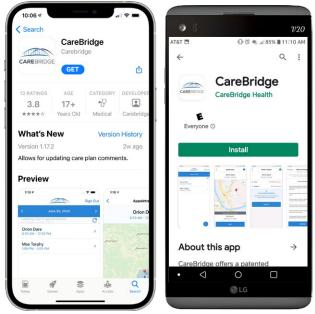
EMPLOYEES

The Employees page in the CareBridge Provider Portal (Figure 4) allows Agency Administrators to view, modify, and create new employee records.

	EMPLOYEES					CAR	Hello, Gwyn Ebridge training (2915 - CST - CE	eth! ⊖
Dashboard	PERSONAL FILTER PAYROLL	COMPLIANCE SCORE						
Discussions	FILTERS							~
Authorizations		I Filters ct a saved filter				ASSIGN TO	+ CREATE EMPLOYEE	0
Ø Visits		E EMAIL PHONE	ROLE	EMPLOYEE STATUS TYPE	OFFICE(S)	GROUP(S)	LAST LOGIN	
Billing	007 Jibin		Employee	Active				:
Members	Caregiver1920 A		Employee	Active				:
Employees	Dona Dona		Employee	Active				i
Settings	C Sherry cb-s	A service in the service of the serv	Admin	Active				I
	Carebridge Ar		Employee	Active				1
	Carebridge Ar		Employee	Active				:
	Wanda		Employee	Active				:
	Shelby	and the second	Admin	Active				i
	Andres cb-a	and the second sec	Admin	Active				1
	Aretha cb c	THE DESIGN ADDRESS.	Admin	Active				:
	EXPORT TO FILE					Rows per page 10 👻	1-10 of 57 < 1 2 3	6>
<								③ Support

	4. Employees p	page
--	----------------	------

Figure 3. Download Application



VIEW EMPLOYEES

Navigate to the Employees page to see a tabular view of all employees that are currently listed in the Provider Portal. This table can be filtered and sorted with several parameters by selecting the **expand arrow** in the **FILTERS** component (Figure 5) or the **Sort by** drop-down menu at the top left of the table (Figure 6).

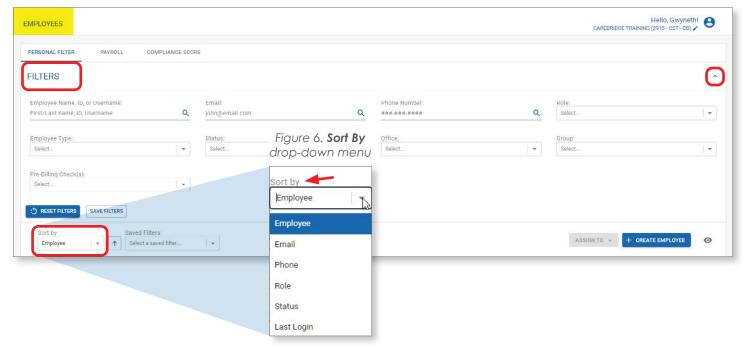


Figure 5. Employee **FILTERS**

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 7) When the **Save Filters** dialog opens, the user is asked to name their custom filter for future reference. (Figure 8)

	Figure	7.	SAVE	FILTERS	button
--	--------	----	------	----------------	--------

Employee Name, ID, or Username: First/Last name, ID, Username Q	Email: john@email.com 	Phone Number: Figure 8. SAVE FILTERS dialog box	Role: Admin X		× •
Employee Type: Back Office x X V	Status: Select	Save Filters	×		
Pre-Billing Check(s): Select		Enter a name for your filter using the field below. The saved filter will only be available in the Employees p			
Sort by Saved Filters Employee		Filter Name Back Office Admins		- + CREATE EMPLOYEE	0
		CANCEL	SAVE		

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 9 & 10)

Figure 9. Employees page Saved Filters	drop-down menu
--	----------------

	EMPLOYEES	Heilo, Gwyn Carebridge training (2915 - C57 - Ce	eth!
Dashboard	PERSONAL FILTER PAYROLL COMPLIANCE SCORE	Figure 10. Saved Filter results: Back Office Admins	
Discussions	FILTERS	Sort by Saved Filters Employee V The Back Office Admin X V	~
Authorizations	Sort hy Caved Filters -	EMPLOYEE USERNAME EMAIL PHONE ROLE EMPLOYEE STATUS	0
Visits	Back Office Admins	Gwyneth Mceuen gmceuen gwyneth mceuen@c 615-545-9969 Admin Back Office Active	

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 11)

Figure 11. Delete Saved Filter

FILTERS			delete this saved filter? This
Sort by Saved F Employee - Back O	liters fice Admins X -	saved filter if you procee	and you will have to create a d.
Back Of	fice Admins	Filter Name	
] EMPLOYEE USERNAME	EMAIL Delote Filter	Back Office Admins	
			CANCEL DELETE FI

VIEW EMPLOYEE DETAILS

To view more details about an Employee, select the **menu icon (three dots)** (Figure 12) on the right side of the row for the Employee and select **Employee Details**.

Sort by						AS	SIGN TO V + CREATE EMPLOYEE
	USERNAME	EMAIL	PHONE	ROLE	STATUS	OFFICE	LAST LOGIN
Adam Adam	100			Super Admin	Active		
Alan Alan	-			Super Admin	Active		Employee Details 04/30/2020, 09:51 pm

Figure 12. Employees page Menu Icon (three dots)

From the **Employee Details** screen, users can view employee demographic info, a **CALENDAR** view of the employee's schedule, upcoming **APPOINTMENTS** (if any), and completed **VISITS** (Figure 13).

Activ	e 🛑 📃	CALENDAR			PPOINTMENTS		VISITS	
Adam 🛁 🦯 🗡	Т	ODAY < > 6-12 F	EBRUARY 2022				Mide C	ancelled WEEK
Username		Sun	Mon	Tue	Wed	Thu	Fri	Sat
		б	7	8	9	10	11	12
Date of Birth								
YYY-MM-DD	1.00 /	-M						
email (optional)	2.00 /	AM						

Figure 13. Employee Details screen

CREATE NEW EMPLOYEE

As an Agency Administrator, to create new employees (Agency Employees or caregivers), select the **+ CREATE EMPLOYEE** button at the top of the Employees table (Figure 14):

Fiaure	14.	+	CREATE	EMPLOYEE	buttor
ingoic	1-1+		CILE/TIE		001101

PERSONAL FILTER	PAYROLL COMPL	IANCE SCORE						
FILTERS								~
Sort by v						A		APLOYEE
EMPLOYEE	USERNAME	EMAIL	PHONE	ROLE	STATUS	OFFICE	LAST LOGIN	
Adam				Super Admin	Active			:



To create employees in bulk, click the **IMPORT** button at the bottom left of the Employees page (Figure 15), download the Excel template, fill it out, then upload it by clicking the **IMPORT** button again.

n

Please Note: If the information you enter in the spreadsheet template is inaccurate, you will have to update the profiles in the system and cannot simply re-import.

MODIFY EMPLOYEE DETAILS

To modify **Employee Details**, select the **pencil icon** next to the employee's name (Figure 16). The **Employee Details** fields will become editable. Select the **SAVE** button at the bottom to save changes.

Adam < > 10-16 MAY 2020 12 13 10 11 14 15 16 1:30 AM Fmail (optional) 3:00 AM First Name 4:30 AM Adam 6:00 AM SAVE Last Name 7:30 AM

Figure 16. Employee Details screen 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. This is a required field.
- **Email:** If the user would like to receive future communications via email a valid email address will need to be entered.
- License Number: For claims to be submitted without error, the caregiver's Certified Home Health Aide (CHHA) number should be entered into this field.

- **MFA Phone Number:** If the user would like to receive a text message with the multi-factor authentication codes for sign up and sign into their mobile phone, this field will need to be completed. (Text messaging or data rates apply.)
- Worker Rate: Worker Rate is used to accurately calculate payroll reports.
- Interactive Voice Response (IVR) PIN: If the employee would like to utilize IVR (For more information on IVR, see the <u>Check-in & Check-out</u> section,) an IVR PIN will need to be entered.
- **Role:** Used to differentiate one type of employee from another. The Provider Portal user roles are as follows:
 - Admin: Has no access restrictions to view or act in the CareBridge Solution.
 - Admin Office: Has access to view/do all things for the offices to which they are assigned
 - Employee:
 - Cannot view Payroll or Compliance Score reports
 - Cannot view Billing Dashboard
 - Cannot complete Manual Entries
 - Cannot generate claims
 - Employee Office:
 - Can only view member data in the offices to which they are assigned
 - Cannot view Payroll or Compliance Score reports
 - Cannot view Billing Dashboard
 - Cannot complete Manual Entries
 - Cannot generate claims

ASSIGN EMPLOYEES TO OFFICES AND/OR GROUPS

Employees/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 (Figures 17 and 18) to assign the selected Employees to an Office or Group. For more information on Offices and Groups, see the <u>Settings</u> section.

Sort by v						ASSIGN TO		OYEE
	USERNAME	EMAIL	PHONE	ROLE	STATUS	OFFICE Group	ST LOGIN	
Adam	1.27			Super Admin	Active	Figure 18. Assig	gn TO screen	* *
Alan and a second	10	10.000		Super Admin	Active	Assign To	×	:
						Main Office	x -	Г
								L
							CANCEL SUBMIT	5

Figure 17. Employee **ASSIGN TO** drop-down menu

EMPLOYEES REPORTS

By default, the **PERSONAL FILTER** is selected upon navigating to the Employees page. It can be used to filter and sort the Employees page table in a variety of ways to return the subset of employees that is most useful. In addition to the **PERSONAL FILTER**, there are two reports that have predefined filters to help quickly navigate to useful employee data (Figure 19).

PERSONAL FILTER	PAYROLL COMPLIANCE SC	LIANCE SCORE
FILTERS		

- **PAYROLL:** This report returns payroll data for a given period for each employee based on completed visits in that time.
- **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 20). Upon selecting the file type, the document will begin downloading and will be available on the Settings page on the left navigation pane under the **DOCUMENTS** sub-tab. For more information, see the <u>Settings</u> section. Figure 20. Employees page EXPORT TO FILE options



MEMBERS

The Members page in the CareBridge Provider Portal allows the designated Agency Employees to view and edit member information. The Members page (Figure 21) is populated with data from the Member file, (provided by the State or PASSE) and updates daily with the most recent information.

	MEMBERS								CNG HEA	Hello, Gwynet	ih! e
Dashboard	PERSONAL FILTER ACTIV	VE MEMBERS UNASSIGNED	MEMBERS COMPLIANCE SCORE								
Discussions	FILTERS										
Authorizations Appointments	Sort by Member Na	Saved Filters Select a saved filter								ASSIGN TO 👻	0
Visits		MEMBER ID	MEDICAID ID	ADDRESS	PAYER(S)	ACTIVE AUTHS	STATUS	OFFICE(S) GF	ROUP(S) L	AST VISIT	
Billing	Ginnie	-	R. 0. 100 R.		CB Payer	No	Active	Trenton Office, Main Office	1	2/17/2020	
) Members	Elden	100	10000	the state	CB Payer	Yes	Active	Jane Home Health Trenton, Main Office	U	9/27/2021	
Employees	Serge	105	NO SAMPLE	-	CD Payer	No	Inactive	Main Office ha	we dogs - large 0	8/20/2020	
Settings	Alling	1000		TRAT.	CB Payer	No	Active	Main Office	0	9/16/2020	
	Hilde	100	10.000	1000	CB Payer	No	Active	Main Office ha	we dogs - large		
	undi 🔍	100	100.0012	20122	CB Payer	Yes	Active	Jane Home Health Trenton, Main Office			
	Kermit in in	-			CB Payer	No	Inactive	Main Office			
	Jennine Jennine	100			CB Payer	No	Inactive	Main Office			
	Dablia	(m)		2027	CB Payer	No	Active	Main Office			
	Perren Perren	B (1)		Der die	CB Payer	No	Active	Main Office			
	T EXPORT TO FILE							Rowa per page:	10 - 1-10 of 100	0 < 1 2 3 - 1	100
(0) Supp

Figure 21. Members page

VIEW MEMBERS

Once a user navigates to the Members page, they will see a tabular view of all members that are currently in the Provider Portal. This table can be filtered and sorted with several parameters by selecting the **expand arrow** in the **FILTERS** component at the top left of the table, or the **Sort by** drop-down menu (Figure 22).

PERSONAL FILTER ACTIVE MEMBERS UN	ASSIGNED MEMDERS COMPLIANCE SCORE		C
Member Name or ID: Search By Name or ID	Sort by	Street Address: City: State: Zip Code:	Q
Payer: Select Payer	Member Name 🚽	Active Auths: Broup:	×
Office:	Member Name		
Select Office	Member ID		
Sort by Saved Filters	Address		
Sort by Saved Filters Member Na_ → Select a saved fil	Status	ASSION TO 💝	0
	Last Visit		

Figure 22. Members page FILTERS and Sort by dropdown menu options

VIEW MEMBER DETAILS

To view more details about a Member, select the **menu icon (3 dots)** on the right side of the member's row and select **Member Details** (Figure 23).

Figure 23. Member page Menu Icon (three dots)

Sort by Member Na ~ 1	Saved Filters. Select a saved filter	-						ASSIGN T	• •
MEMBER	MEMBER ID	MEDICAID ID	ADDRESS	PAYER(S)	ACTIVE AUTHS	STATUS	OFFICE(S) GROUP(S)	LAST VISIT	
Ginnie	180	-		CB Payer	No	Active	Trenton Office, Main Office	12/17/2020	1
Elden	10	Line San R	107037	CB Payer	Yes	Active	Jane Home Health Trenton, Main Office	09/27/2021	: Member Details

From the **Member Details** screen (Figure 24), you can view member demographic info, a **CALENDAR** view of visits, list views of upcoming **APPOINTMENTS** (if there are any), and completed **VISITS**, the member's **CARE PLAN** details, **DISCUSSIONS** about the member, and their **AUTHORIZATIONS**.

			CALENDAR	APPOINTMENT	s	VISITS	CARE PLAN		
Elden 📕 🖌	TODAY	< > SE	P 26 - OCT 2, 2021					Hide Canc	elled WEEK
ate of Birth		sun 26	27	28	Wed 29	^{Thu} 30		n 1	Sat 2
ayer(s)	1:00 AM								
B Payer	2:00 AM								
igibility Dates	3:00 AM								
/01/2019 - None (CB Payer)	4:00 AM								
mary Address	5:00 AM								
	6:00 AM								
condary Address(es)	7:00 AM								
ne	8:00 AM								
ail	9:00 AM			Gwyneth 9:00 AM - 10:00 AM					
	10:00 AM			9:00 AM - 10:00 AM		Guerneth	Petey	10-00 AM	
nary Phone Number	11:00 AM		Katie 10:51 AM			Gwyneth 10:00 AM - 11:00 AM		10.00 980	
(CB Payer)	12:00 PM								
condary Phone Number(s)	1:00 PM								
ne									
itus	2.00 PM								
ive	3:00 PM		Gwynech 3:00 PM - 4:00 PM		Gwyneth 3:00 PM - 4:00 PM				
igram	4:00 PM				and the second second second				
ne	5:00 PM			Gwyneth .5:00 PM					
dicaid ID	6:00 PM								
1802036445587	7:00 PM								
B ID	8:00 PM								
	9:00 PM								
	10:00 PM								
fice Main Office x Jane Home Health Trenton x	w.								
ups	11:00 PM								
	•								
	Discussio	ns							
									0
	Authorizat	tions							
									0

Figure 24. Member Details screen

CREATE OR MODIFY MEMBER CARE PLANS

From Member Details, an agency employee can create a Care Plan for a member. A Care Plan is a list of activities to be performed by a caregiver with the member. By selecting the **+ ADD ACTIVITY** button (Figure 25), the Care Plan Activity model will open, and the **ACTIVITY** and **FREQUENCY** can be selected along with adding **COMMENTS**, if applicable (Figure 26). These **CARE PLAN** activities can be edited at any time by selecting the **menu icon (three dots)** in the row of the activity and selecting **Edit Activity**. Additionally, it is possible to view previous versions of the **CARE PLAN** by selecting the **As**of drop-down on the top right of the table. You can view the <u>Check-In & Check-Out</u> section for more information on how the **CARE PLAN** is presented to caregivers for completion as a part of a visit.

		CALENDAR API	POINTMENTS	VISITS	CARE PLAN	
Elden 🚽 🖌	FILTERS				As of 09/1	3/2021 14:29 🛛 👻
Date of Birth						
						O
Payer(s)	ACTIVITY	FREQUENCY	_		Activity dialo	g
CB Payer	N1 - Dressing	5x per week	Care Plan A	letivity	×	_
Eligibility Dates	Cleaning kitchen	1x per week	Activity	Select	1.	Edit Activity
Primary Address	Laundry	2x per week	Frequency	Sx per week	•	:
(CB Payer)	Cleaning bathroom	3x per week		likes navy shirts		:
	Dusting	2x per week	Comments			:
Secondary Address(es) None	+ ADD ACTIVITY					1-5 of 5 < 1 >
			-			

Figure 25. Member Details CARE PLAN screen

MODIFY MEMBER DETAILS

The Member Details page is populated with data from the Member file (provided by the State or PASSE) and updates daily with the most recent information. In some instances, it may be necessary to update a member's address or phone number to reflect more up-to-date changes than have been reflected in the Member file. To modify these details, select the **pencil icon** next to the member's name in **Member Details** (Figure 27).

			CALENDAR	APPOINTMENTS	VISITS	CAP	RE PLAN	
Elden 📲 🖉 📝	TODAY	< > 6-12 FI	EBRUARY 2022				🛃 Hide Car	week *
Date of Birth		Sun	Mon	Tue	Wed	Thu	Fri	Sat
		6	7	8	9	10	11	12
Payer(s)	1:00 AM							
B Payer	2.00 AM							
ligibility Dates	3:00 AM							
3/01/2019 - None (CB Payer)	4:00 AM							
imary Address	5:00 AM							
(CB Payer)	6:00 AM							
condary Address(es)	7:00 AM							
(CB Payer)	8.00 AM							
	9:00 AM							
nail	10:00 AM							

Figure 27. Member Details pencil icon

Upon selecting the **pencil icon**, the user will be presented with a dialog to input the new/corrected address or phone number (Figure 28). The **Address Type** drop-down provides a place to record where the member is staying if not at home - i.e., "Church", "Family Member's Home" or "Temporary Residence". Once **SAVE** is selected, the address or phone number will be sent to the Payer (PASSE) for approval. Until it is approved, the address or phone number will not be available to use for the purposes of scheduling an appointment or completing a visit. The request can be viewed at any point in the

Discussions area of the Communications section.

EDIT APPOINTMENT INFORMATION IN BULK

When in the **Member Details** dialog, appointment times and employee (caregiver) assignments can be edited in bulk. Simply go to the **APPOINTMENTS** sub-tab and edit groups of appointments

by selecting the **check boxes** on the left end of the appointment rows. Then click on the **EDIT APPOINTMENTS** button (Figure 29).

Figure 29. Appointment **check boxes** and **EDIT APPOINTMENTS** button

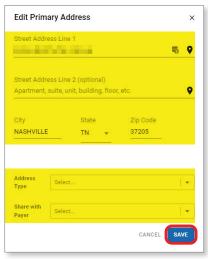
1	MID	MEMBERS > DETAILS >							CNG HEA	Hello, Gwyneth LTH KOHLER-RICE (16 - CST	; 0
H	Dashboard			CALE	NDAR	APPOINTMENTS	VISI	TS	CARE PLAN		
=	Discussions	Elden - /	Filters					EDIT APPO	DINTMENTS	ANCEL APPOINTMENTS	×
Ĵ	Authorizations	Date of Birth 1972-02-04									0
	Appointments	Payer(s)	DATE	START TIME	END TIME	EMPLOYEE	AUTH #	SERVICE	APPTID	STATUS	
0	Visits	CB Payer	02/08/2022	12:00 PM	01:00 PM	10,000,00	1.1.1.1.1	\$5125	12.55	Scheduled	:
	Billing	Eligibility Dates	02/10/2022	12:00 PM	01:00 PM	-		\$5125		Scheduled	÷
•	Members	03/01/2019 - None (CB Payer) Primary Address	02/12/2022	12:00 PM	01:00 PM			\$5125		Scheduled	:
\$	Employees	And includes the State State of State	02/14/2022	12:00 PM	01:00 PM	-	-	S5125	10100	Scheduled	:
2	Settings	and the second second	02/16/2022	12:00 PM	01:00 PM	10-1-10-10		\$5125	10,000	Scheduled	:
		Secondary Address(es)	02/18/2022	04:00 PM	05:00 PM	1.0		\$5125	-	Scheduled	:

Next, make the **Start Time** and/or **End Time** changes, select the appropriate **EMPLOYEE** (caregiver) if necessary, and click **SUBMIT** (Figure 30). On the next screen, double-check your changes and click **GO BACK** to make more edits or **CONFIRM** to save your changes.

Start Time	Ø	End Time :	O	Employee Gwyneth Mceu X 👻	🕑 The follo	wing Appointment	s will be updated	with the new inform	nation below
	Appointment		0						
DATE	START TIME	END TIME	APPT ID	EMPLOYEE	DATE	START TIME	END TIME	APPT ID	EMPLOYEE
02/08/2022	12:00 PM	01:00 PM	558706	Gwymeth	02/08/2022	12:00 PM	01:00 PM	558706	Gwyneth
02/10/2022	12:00 PM	01:00 PM	558707	Кау	02/10/2022	12:00 PM	01:00 PM	558707	Gwyneth
02/12/2022	12:00 PM	01:00 PM	558708	Gwyneth	02/12/2022	12:00 PM	01:00 PM	558708	Gwyneth
02/14/2022	12:00 PM	01:00 PM	558709	Gwyneth == =	02/14/2022	12:00 PM	01:00 PM	558709	Gwyneth
02/16/2022	12:00 PM	01:00 PM	558710	Gwyneth	02/16/2022	12:00 PM	01:00 PM	558710	Gwyneth and a second
		Rows per page	.5 ¥ 1-5	d14 < 1 2 3 >			Rows per page:	5 🛩 1-5 of	14 < 1 2 3 >
				CANCEL					

Figure 30. Edit Appointments SUBMIT and CONFIRM screens

Figure 28. Member **Address Update** screen



ASSIGN MEMBERS TO OFFICES AND/OR GROUPS

Use the **check boxes** next to member names on the Members page to select them, then select the **ASSIGN TO** button at the top right of the table to assign members to **Offices** or **Groups** (Figure 31). (See the <u>Settings</u> section for more information about **Offices** and **Groups**.)

Eiguro 31	Mombors page		drop-down menu
inguie 51.	menners page	ASSIGNTO	uop-uowinneno

ort by Member Name	Saved Filter							(ASSIGN TO V	+ ADD MEMBER	o
MEMBER	MEMBER ID	MEDICAID ID	ADDRESS	PAYER(S)	ACTIVE AUTHS	STATUS	OFFICE(S)	GROU	Group	AST VISIT	
Carebridge	100			Arkansas Medicaid	Yes	None					1
Client	-	-		Arkansas Medicaid	Yes	None					1
IIIL	100	line with		Arkansas Total Care	No	None					1

MEMBER REPORTS

By default, the **PERSONAL FILTER** is selected upon navigating to the Members page. It can be used to filter and sort the Members page table in a variety of ways to return the subset of members that is most useful. In addition to the **PERSONAL FILTER**, there are three reports that have predefined filters to help quickly navigate to useful member data (Figure 32).

Figure 32. Members page reports

PERSONAL FILTER	ILTER ACTIVE MEMBERS UNASSIGNED MEMBERS COMPLIANCE SCORE
FILTERS	

- **ACTIVE MEMBERS:** This report returns a list of all active members.
- **UNASSIGNED MEMBERS:** This report returns a list of all members who have not been assigned to an **Office**.
- **COMPLIANCE SCORE:** This report returns a list of all members (ascending order) by Compliance Score.

To export any of the data on the Members Page to a **PDF**, **XLS**, or **CSV** file, select the **EXPORT TO FILE** button on the bottom of the page (Figure 33). Upon selecting the file type, the document will begin downloading and will be available on the Settings page under the **DOCUMENTS** sub-tab.



ELECTRONIC VISIT VERIFICATION (EVV) WORKFLOWS

OVERVIEW

The following will help introduce the features and functionality associated with EVV in the CareBridge Solution and how it can be used as a tool to help easily manage day-to-day workflows.

AUTHORIZATIONS

The Authorizations page in the CareBridge Provider Portal (Figure 34) allows Agency Employees to view, acknowledge, and manage Authorizations that are available to the Provider. The Authorizations page is populated with data from the Authorizations file which updates on a recurring basis with the most recent information.

	AUTHORIZATIONS										CNG HEA	Hello, Gwyne LTH KOHLER RICE (16 - C	th! \\ ST)
Dashboard	PERSONAL FILTER UNACKN	OWLEDGED	UNASSIGNED	DECLINED									
Discussions	FILTERS												~
Authorizations	Sort by		Saved Filters										ø
Appointments	Updated Date	▼ ↓	Select a saved filter	*									U
Visits	MEMBER UPDATED DATI	E START DATE	END DATE	UNITS	AUTH #	SERVICE	MODIFIERS	SCHEDULED UTILIZATION %	BILLED UTILIZATION %	PAYER	STATUS	EMPLOYEE	
m Billing	Elden 02/08/2022	01/17/2020		1683	10.000	85125		59.66	28.7	CB Payer	(Acknowledged)	Kay 🕌 👻	⊟ :
Members	Jeanette 02/08/2022	02/11/2020	11/16/2020	2321	114.4	\$5130		0	0	CB Payer	Acknowledged	Windy +	⊟ :
Settings	Magda 02/04/2022	03/20/2020	12/22/2020	1408		\$5125		0	0	CB Payer	Acknowledged	Kay 📕 🔻	= :
	Geneva 02/02/2022	03/02/2020	11/07/2020	2338		\$5125		0	0	CB Payer	Acknowledged	Kay 🚽 👻	:
	Krishna 02/01/2022	02/08/2020		1711	-	s5130		0	0	CB Payer	Acknowledged	Kay	□ :
	Eldin 01/20/2022	01/14/2020		1263	11010	\$5130		3.8	U	CB Payer	(Acknowledged)	Gwyneth +	⊟ :
	Rubina 01/18/2022	01/23/2020	11/12/2020	1986	-	\$5125		0	0	CB Payer	Acknowledged	Kay 🔤 🖌 👻	⊟ :
	Laird 01/12/2022	03/19/2020	11/16/2020	2366		55125		0	0	CB Payer	Acknowledged	Kay 🚽 👻	:
	Dan 01/12/2022	03/24/2020	11/22/2020	2369	-	\$5130		0	0	CB Payer	Acknowledged	Kay 🗸	□ :
<	Gwen 12/15/2021	01/07/2020	01/03/2021	1604	10.000	\$5125		0	0	CB Payer	(Acknowledged)	Kay 💼 💿 📀	Support

Figure 34. Authorizations page

VIEW AUTHORIZATIONS

The Authorizations page contains a tabular view of all authorizations that are currently available in the Provider Portal. This table can be filtered and sorted with several parameters by selecting the **expand arrow** or the word **FILTERS** at the top of the table (Figure 35) or the **Sort by** drop-down at the bottom left of the **FILTERS** area (Figure 36).

ILTERS							(
Search By Name or Member ID: Name or ID	٩	Search By Auth#: Auth #	٩	Updated Dates: Start Date - End Date		Start Date: Start Date - End Date	
End Date: Start Date - End Date 🛅		Payor: Select Payer	-	Status:		Assigned To:	
Service:		Scheduled Utilization:		Billed Utilization:		Pre-Billing Check(s):	
Select	-	Select	-	Select	-	Select	-
Sort by Saved F Updated Date		ed Date					
		r	_				6
	a save Membe	d Date	-				C
	Membe Update Start D End Da	d Date					¢
	Membe Update Start D End Da Units	d Date					C
	Membe Update Start D End Da	er A					e
	Member Update Start D End Da Units Auth # Service	er A					0

Figure 35. Authorization page **FILTERS**

ACKNOWLEDGE RECEIPT OF AN AUTHORIZATION

When authorizations are made available to a Provider, they will display on the Authorizations page with a status of **Received**. The user will need to acknowledge the authorization by clicking the **Received** button and selecting **Acknowledge** from the drop-down menu (Figure 37). This will update the status in the table and will be communicated to PASSE for that authorization. If you cannot accept an authorization, you must contact PASSE directly. You must respond to all authorizations.

MEMBER	UPDATED DATE	START DATE	END DATE	UNITS	AUTH #	SERVICE	MODIFIERS	SCHEDULED UTILIZATION %	BILLED UTILIZATION	PAYER	STATUS	EPPLOYEE
Cathe	06/27/2020	01/15/2020		2163		\$5125		0	0	CB Payer	Acknowledge	Select 🖌 🛗 🗄

Super Admi

Aaron Balloor Kristen Barbe

Betty Boop Aretha Brooks

Nindy Bruce

Kirk Callahan

ASSIGN EMPLOYEE TO AN AUTHORIZATION

To assign an employee to an authorization, select the drop-down menu and choose the **EMPLOYEE** from the list (Figure 38). This will update the assignment in the table.

Figure 38. Assign Employee drop-down menu

MEMBER	UPDATED DATE	START DATE	END DATE	UNITS	AUTH #	SERVICE	MODIFIERS	SCHEDULED UTILIZATION %	BILLED UTILIZATION	PAYER	STATUS	EMPLOYEE	
Cathe Fideler	06/27/2020	01/15/2020		2163	966296538244932	S5125		0	0	CB Payer	✓ Received	Select	
												Test10 10	
												Test20 20	
												Barb Ackue	
_												Kay Adams	

SCHEDULE APPOINTMENTS (OPTIONAL)

When viewing an authorization on the Authorizations page, a user can navigate directly to the appointment scheduling workflow. By selecting the **calendar icon** on the Authorizations page (Figure 39), they can view the **Appointment Scheduling** dialog. If the **calendar icon** is not available, but the authorization is active, remember to check the member's eligibility. For more information about scheduling appointments, refer to the <u>Appointments</u> section.

Figure 39. Schedule appointments from the Authorizations page

MEMBER	UPDATED DATE	START DATE	END DATE	UNITS	AUTH #	SERVICE	SCHEDULED UTILIZATION %	BILLED UTILIZATION	PAYER	STATUS	EMPLOYEE
Willi	09/25/2021	03/14/2020		1775	-	\$5130	12.62	0	CB Payer	Acknowledged	Windy
Elden and a	09/25/2021	01/17/2020		1683		\$5125	43.43	13.9	CB Payer	Acknowledged	Gwyneth 👘 🗧 :

AUTHORIZATION DETAILS

To view more details about an authorization, select the **menu icon (3 dots)** on the right end of the authorization's row (Figure 40) and select Authorization Details.

				F	igure 40. Au	thoriza	itions menu	icon (3	dots)			
								SCHEDULED	BILLED UTILIZATION			
MEMBER	UPDATED DATE	START DATE	END DATE	UNITS	AUTH #	SERVICE	MODIFIERS	UTILIZATION %	%	PAYER	STATUS	EMPLOYEE
Kenna	09/15/2021	02/22/2020		1808	1100.00	\$5125		0	0	CB Payer	(Acknowledged	Kay Authorization Details
Merry	09/13/2021	03/15/2020	02/06/2021	1500	100.00	\$5130		U	0	CB Payer	Acknowledged	Kay Member Details

From the Authorization Details screen (Figure 41), the user can view Start/End Dates, Service Codes, Modifiers, Hours, Units, Limits, Schedules, Utilization Percentages, as well as upcoming Appointments (if any) and completed Visits associated with the authorization.

he Fideler horization 9662965382 5/2020 - None s: Acknowledged (Amanda Sav		As of 09/27/2021 02:22 PM (current)	•
	suitany		
Authorization Details A			
SCHEDULED UNITS 0 UNITS OF 2163 UNITS USED		BILLED UNITS 0 UNITS OF 2163 UNITS USED	
e structure de avanaere	2163	enum evenent	2163
Payer	Auth Number	Start-End Date	
CB Payer	966296538244932	01/15/2020 · End Date	
Service Code	Units	Diagnosis Code 1	Diagnosis Code 2
85125	2163	Z7689	-
Employee	Member Eligibility		
Test20.20	• 06/13/2019 - 06/29/2021		
ſ			
No Current Note			
Attach File			RESET
Authorizations Segments 🗸			
Appointments/Visits 🗸			

There are also several actions that can be utilized directly from the

- Authorization Details screen by clicking on the **pencil icon**:
- Add a secondary Diagnosis Code to the authorization.
- Assign an employee to the authorization.
- Add notes to the authorization.
- The **SCHEDULE APPOINTMENT** button will take the user to the Appointments Scheduling dialog. For more information about scheduling appointments, refer to the <u>Appointments</u> section.
- The **+ MANUAL ENTRY** button takes the user to the Manual Entry dialog. For more information about manual entries, refer to the <u>Check-In & Check-Out</u> section
- The **Close** button will close Authorization Details.

AUTHORIZATIONS REPORTS

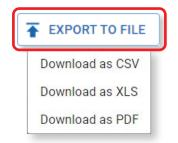
By default, the **PERSONAL FILTER** is selected on the Authorizations page. It can be used to filter and sort the Authorizations table in a variety of ways to return the subset of Authorizations that is most useful. In addition to the **PERSONAL FILTER**, there are three reports that have predefined filters to help quickly navigate to useful Authorizations data (Figure 42).

Figure 42. Authorizations p	bage	reports
-----------------------------	------	---------

- **UNACKNOWLEDGED:** This report returns a list of all authorizations that have not yet been acknowledged or declined.
- **UNASSIGNED:** This report returns a list of all authorizations that have not yet been assigned an employee.
- **DECLINED:** This report returns a list of all authorizations that have been declined.

To export any of the data on the Authorizations Page to a **PDF**, **XLS**, or **CSV** file, select the **EXPORT TO FILE** button on the bottom of the page (Figure 43). Upon selecting the file type, the document will begin downloading and will be available on the Settings page under the **DOCUMENTS** sub-tab.

Figure 43. Authorizations page **EXPORT TO FILE** options



APPOINTMENTS

The Appointments page in the CareBridge Provider Portal (Figure 44) allows Agency Employees to view upcoming, scheduled appointments (if any) as well as identify and act upon early, late, or missed visits. **Please note:** If caregivers are using the mobile application to create ad-hoc appointments at the start time of the appointment, those instances will be available for review on the Visits page.

THUR	APPOINTMENTS								CNO	Hello, Gw 3 HEALTH KOHLER-RICE (1	vyneth!
Dashboard	PERSONAL FILTER LA	TE APPOINTMENTS MI	SSED APPOINTMENTS	CANCELLED APPOINTME	NTS						
Discussions	FILTERS										
Authorizations	Sort by Date	Saved Filters	ilter								Ø
Appointments Visits	MEMBER	DATE	START TIME	END TIME	APPT ID	EMPLOYEE	AUTH #	SERVICE	STATUS	PAYER	
Billing	Elden	09/27/2021	03:00 PM	04:00 PM	10.05	Gwyneth	-	\$5125	Missed	CB Payer	
Members	Elden	09/28/2021	09:00 AM	10:00 AM	884	Gwyneth	-	\$5125	Scheduled	CB Payer	
Employees	Elden	09/28/2021	05:00 PM	05:30 PM	100	Gwyneth		\$5125	Scheduled	CB Payer	
Settings	William	09/28/2021	05.00 PM	06.00 PM	100	Windy	10.0	\$5130	Scheduled	CB Payer	
	Elden Elden	09/29/2021	03:00 PM	04:00 PM	-	Gwyneth and a			Scheduled	CB Payer	
	William William	09/29/2021	05:00 PM	06:00 PM	100000	Windy			Scheduled	CB Payer	
	Elden III III	09/30/2021	10:00 AM	11:00 AM	100000	Gwyneth	10000		Scheduled	CB Payer	
	Elden	10/01/2021	10:00 AM	10:30 AM	100	Petey	1000		Scheduled	CB Payer	
	Elden and	10/01/2021	05:00 PM	06:00 PM 05:00 PM	10.00	Кау			Scheduled	CB Payer	
	EXPORT TO FILE								Rows per page: 10 🛩		123
<											() Supp

Figure 44. Appointments page

SCHEDULING APPOINTMENTS IN THE PROVIDER PORTAL

For appointments to appear on the Appointments page they must first be scheduled. **Scheduling appointments is optional in Arkansas.** To schedule an appointment within the Provider Portal, first navigate to the Authorizations page (see the <u>Authorizations</u> section) and select the **calendar icon** next to the authorization for which it is necessary to schedule an appointment (Figure 45).

MEMBER	UPDATED DATE	START DATE	END DATE	UNITS	AUTH #	SERVICE	SCHEDULED UTILIZATION %	BILLED UTILIZATION	PAYER	STATUS	EMPLOYEE
Willi	09/25/2021	03/14/2020		1775	1000	\$5130	12.62	0	CB Payer	(Acknowledged)	Windy 🗖 :
Elden	09/25/2021	01/17/2020		1683	10.000	\$5125	43.43	13.9	CB Payer	Acknowledged	Gwyneth 👘 🗧 🗄

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

× Schedule Appointment				
Elden Authorization 01/17/2020		Select For Scheduling	Turne Selection Employee Start time Image: Complexity of the selection Overnight Appointment(s) Employee	•
SCHEDURED UNITS 1012 UNITS OF 1683 UNITS USED	671 480 (MITS 450 (MITS USES 450 (MITS 07 1655 (MITS USES 450 (MITS 07 1655 (MITS USES 450 (MITS 0 (MI	1200	Location Start Location	-
		Start-End Date	Individual Date Selection Solicit Dates	
	ber Eligibility 1/2019 - None		Repeat Schedule CLEAR Start Date Select	
No Current Note			End 🔿 After Visits 🔿 By 🗖 etc.ord a < >	
			Add Note	
) Attach Hie GLEA	AR
			SCHEDULE APPOINTMENTS	

On the left side of the **Schedule Appointment** screen, 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 to be 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).
- 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.





Upon completion of the fields listed, the Dates Selected card will populate with the appropriate dates based on the Repeat Schedule fields (Figure 48).

		-	Dates Selected	Ē
elect Dates		Ō	02/09/2022	\supset
			02/10/2022	5
epeat Schedule		CLEAR	02/11/2022	\leq
art Date 2/15/2022 🗖 Repeat Every	week(s)			\leq
			02/12/2022	
epeat On Wednesday ×	×			
	_			
nd After 4 Visits By			1-4 of 4 🛛 <	>
Add Note				
				~
				G
0) Attach File				CLEAR
) Attach File				CLEAR

Figure 48. Appointment dates selection

The user can also 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 of the selected dates.

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

SCHEDULING APPOINTMENTS IN THE MOBILE APPLICATION

Caregivers can schedule ad-hoc appointments in the CareBridge mobile application.

- 1. Click on the **+ symbol** and find the member's name and Service Code.
- 2. Click on the **member's name**.
- 3. Enter the **start and end times** of the appointment.
- 4. Click **OK** to confirm the appointment.
- 5. Now they will be able to see the member/appointment on the appointment schedule list.

Caregivers can either schedule their appointments in advance and create an appointment schedule, or they can schedule the appointment at the start time of the appointment and Check-In immediately. In the latter case, the appointment will be classified as a visit, and will be available for review on the Visits page in the Provider Portal.

VIEW APPOINTMENTS

On the Appointments page (Figure 49), 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** or the word **FILTERS** or the **Sort by** drop-down menu (Figure 50).

	APPOINTMENTS								CNG	Hello, Gwy HEALTH KOHLER-RICE (16	CDT)
Dashboard	PERSONAL FILTER LAT	TE APPOINTMENTS MI	SSED APPOINTMENTS	CANCELLED APPOINTMENTS							
Discussions	FILTERS										
Authorizations Appointments	Sort by Date	Saved Filters	lter 🗸 👻								0
Visits	MEMBER	DATE	START TIME	END TIME	APPT ID	EMPLOYEE	AUTH #	SERVICE	STATUS	PAYER	
Billing	Elden Elden	09/27/2021	03:00 PM	04:00 PM	12.00	Gwyneth	-	85125	Missed	CB Payer	
Members	Elden	09/28/2021	09:00 AM	10:00 AM	224	Gwyneth	-	\$5125	Scheduled	CB Payer	
Employees	Elden	09/28/2021	05:00 PM	05:30 PM	100	Gwyneth		\$5125	Scheduled	CB Payer	
Settings	🗋 willi	09/28/2021	05.00 PM	06.00 PM	100	Windy	1000	\$5130	Scheduled	CB Payer	
	Elden	09/29/2021	03:00 PM	04:00 PM	-	Gwyneth		\$5125	Scheduled	CB Payer	
	Williams	09/29/2021	05:00 PM	06:00 PM	1.00-000	Windy	-	\$5130	Scheduled	CB Payer	
	Elden III IIII	09/30/2021	10:00 AM	11:00 AM	10000	Gwyneth	1000	\$5125	Scheduled	CB Payer	
	Elden	10/01/2021	10:00 AM	10:30 AM	100	Petey	Section 200	\$5125	Scheduled	CB Payer	
		10/01/2021	05:00 PM	06:00 PM		Kay	ALC: NO	\$5130	Scheduled	CB Payer	
	Elden	10/04/2021	04.00 PM	05.00 PM	10.000	Kay 🖾 📕		\$5125	Scheduled	CB Payer	
	EXPORT TO FILE								Rows per page: 10 🛩	1-10 of 29 < 1	2 3
										(() s

Figure 49. Appointments page



APPOINTMENTS				He CNG HEALTH KOHLEF	ello, Gwyneth! O
PERSONAL FILTER LATE APPOINTMENTS MISSED APPOINTM	MENTS CANCELLED APPOINTMENTS				
FILTERS					
Search By Member: Search by Name or ID Q	Search By Appt ID: Appt ID	Search By Auth #: Auth #	٩	Search By Employee: Search By Name or ID	٩
Date Range. 09/27/2021 - 12/27/2021 Pre-Billing Check(s): Select	Sort by drop-dov	Status: Scheduled X In Progress X Lath nenfs page Late and In Progress X Missed X Missed and In Progress X Farly an Vn menu Aggregation Status: Select	· ·	Service. Select	~
RESET FILTERS SAVE FILTERS Sort by Saved Filters Date	Member Date Start Time End Time				Ø
	Appt ID Employee Auth # Service Modifiers Status				

APPOINTMENT DETAILS

To view more details about an appointment, select the **menu icon (3 dots)** on the right side of the appointment row and select **Appointment Details** (Figure 52).

Figure 52. Appointments page menu icon (3 dots) and Appointment Details link

MEMBER	DATE	START TIME	END TIME	APPT ID	EMPLOYEE	AUTH #	SERVICE	STATUS	PAYER	
Elden 🛛 💼	09/27/2021	03:00 PM	04:00 PM		Gwyneth	1111	\$5125	Missed	CB Payer	<u>i</u>
Elden	09/28/2021	09:00 AM	10:00 AM	100	Gwyneth	1000	\$5125	Scheduled	CB Payer	Appointment Details Authorization Details
Elden III III	09/28/2021	05:00 PM	05:30 PM	100.0	Gwyneth	1.000	\$5125	Scheduled	CB Payer	Member Details

From the **Appointment Details** screen, 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. A user may move between all the member's upcoming **APPOINTMENTS** and completed **VISITS** by selecting them from the list on the left. Finally, the user can explore a list of Pre-Billing **ALERTS**, the member's **CLAIMS HISTORY**, the member's **CARE PLAN** activities or **OBSERVED CHANGES** data, a **CALENDAR** view of all the member's appointments and visits in one place, and their **SCHEDULE HISTORY** by selecting each of those options from the tabs on the right (Figure 53).

Figure 53. Appointment Details screen

Discussions	APPOINTMENTS	VISITS		DETAILS	CLAIMS HISTORY	CARE PLAN	OBSERVED	CALENDAR	SCHEDUL
Authorizations	08/28/2021	10/28/2021	-				CHANGES		HISTORY
Appointments	Show	w All		Appointment	E.				
Visits	10/04/2021 Kay	25 hrs \$5125	•	Appointment ID:	100				
Billing	10/01/2021 Petey	30 min \$5125		Status: Authorization:	Scheduled				
Members	09/30/2021 Gwyneth	1 hrs \$5125		Employee:	Gwyneth				
Employees	09/29/2021 Gwyneth	1 hrs \$5125		Start Date/Time.	Sep 28, 2021 9.00 AM				
Settings	09/28/2021 Kay	30 min 35125		End Date/Time: Otart Location:	Sep 28, 2021 10:00 A	м ————————————————————————————————————			
	09/28/2021 Gwymeth	1 hrs 85125		End Location:		The second second second			
	09/27/2021 Gwyneth	1 hrs \$5125		Expected Duration		units).			
	09/25/2021 Gwyneth	1 hrs \$5125		Payer	CD Payer				
	09/24/2021 Gwyneth	1 hrs \$5125		Billing					
	09/23/2021 Katie	22 hrs 15 min \$5125		Service Code: Modifiers:	S5125 None				
	09/22/2021 Gwyneth	1 hrs 35125		Billing Status: Units:	None				
	09/17/2021 Gwyneth	0 min 85125							
	09/15/2021 Kay	13 hrs S5125		Add Note					
	09/10/2021 Gwyneth	1 hrs \$5125							
	09/09/2021 Gwyneth	1 hro \$5125	-	Attach File					CANCEL SAVE

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

- **MANUAL ENTRY:** for non-EVV visits, complete a **Manual Entry**. (See the <u>Visits</u> 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:** Admin and Admin-Office employees (in Offices to which they are assigned) may choose to cancel appointments and provide cancellation reasons.

APPOINTMENTS REPORTS

By default, the **PERSONAL FILTER** is selected upon navigating to the Appointments page. It 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 54).

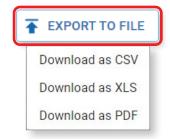
Figure 54. Appointments page reports

RSONA	AL FILTER	LATE APPOINTMENTS	MISSED APPOINTMENTS	CANCELLED APPOINTMENTS
LTEF	RS			

- 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 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 3 hours of the appointment start time.
- **CANCELLED APPOINTMENTS:** This report returns a list of all cancelled appointments. Appointments can only be cancelled by Admins or Admin-Office in the office(s) to which they are assigned.

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 55). Upon selecting the file type, the document will begin downloading and will be available on the Settings page under the **DOCUMENTS** sub-tab.

Figure 55. Appointments page **EXPORT TO FILE** options



MOBILE APPLICATION CHECK-IN & CHECK-OUT

Within the CareBridge EVV Solution, there are two primary ways for a caregiver to Check-In and Check-Out of an appointment with a member. The preferred method is by utilizing the **CareBridge Mobile Application** and the second is by utilizing the **CareBridge Interactive Voice Response (IVR)** system.

Even when there is no cellular coverage at a member's home, the mobile app will store the **Check-In** and **Check-Out** information and forward it to the Provider Portal when the caregiver's mobile phone returns to an area with cellular coverage.

SCHEDULE

Upon logging into the CareBridge Mobile Application, the user will be presented with an appointment schedule list (Figure 56). If the user has scheduled visits (either scheduled by their Provider Agency or themselves via the mobile app) the list will allow the user to view appointments that are scheduled for that day. If the **arrow icons** (< >) on either side of the date are selected, they can view their past visits or tomorrow's schedule.

Figure 56. Schedule screen



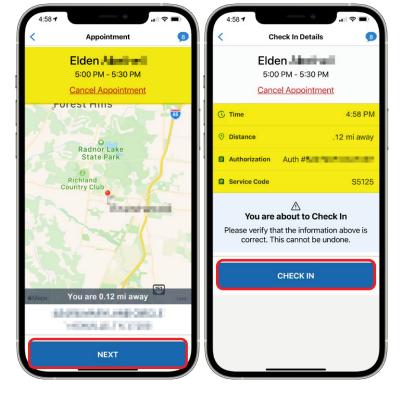
CHECK-IN

To check into a scheduled appointment, select the **name** of the member in the Schedule list. Once selected, appointment information for the member, the GPS location for Check-In, and a calculation of the current distance from the scheduled location of the appointment are displayed (Figure 57).

Upon selecting **NEXT**, the user is presented with **Check In Details** including the current time, location, and differences between those and the scheduled time and location for the appointment. The user can check into the appointment by selecting the **CHECK IN** button, (Figure 58).

Please note: when different services are scheduled in consecutive order, the Caregiver must **Check-Out** of the first service and **Check-In** for the second service in order for the visits to complete properly and billing to occur accurately. These back-to-back appointments must be scheduled with at least **one minute** between them. For example, 9 am to10 am and then 10:**01** am to 11 am. The same minute cannot be used twice. Figure 57. Check-In Location

Figure 58. Check-In Details



CareBridge

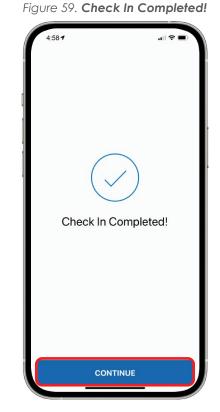
Once the caregiver has checked-In and seen the **Check In Completed!** screen, (Figure 59), they should **STOP using the app**. They may begin working the visit and assisting the member. Once finished with their duties they may return to the mobile app to continue capturing the details of the visit. It will pick-up where they left off.

OBSERVED CHANGES

When checking out using the mopile app, the caregiver will be presented with important questions allowing them to indicate whether the member had any **Observed Changes** (Figure 60).

The caregiver should keep these things in mind while performing their tasks during the visit. Once they are finished with their duties, they may fill out the Observed Changes Survey in the mobile app.

All the questions are "yes/no" questions and to answer a question "yes," select the **radio button** (()) next to the question. If the answer is "no," leave the radio button empty. If there is an **Observed Change**, it will trigger a **Discussion** that is sent to both Payer (PASSE) and Provider. **Discussions** can be accessed on the Discussions page. Once all questions are answered, the caregiver can select the **CONTINUE** button. If there are no changes, the Caregiver may select **NO OBSERVED CHANGES** (Figure 60) and then **Confirm**.



chedule	Observed Changes	B	Schedule Observed Changes	B	Schedule	Observed Changes	9	Discussion Has the member fallen since the last							visit?
	Elden 5:00 PM - 5:30 PM		Elden 5:00 PM - 5:30 PM Cancel Appointment			Elden Please review each question carefully. Tap t question if there is an observed char				ell in the					
quest	v each question carefully. Tap t ion if there is an observed char		Please review each question carefully. Tap question if there is an observed char	to mark the nge.	the hospi	nember been admitted to tal or emergency room last visit?	0		C.	ancel			Su	bmit	
the hosp	member been admitted to ital or emergency room a last visit?	0	Has the member been admitted to the hospital or emergency room since the last visit?	0	Has the r last visit?	nember fallen since the	•					L	Su	DIIIIC	J
	Has the member fallen since the last visit?		Has ti By selecting 'Confirm' below, last vi you are acknowledging that you did not observe any changes for the member			nember's health or illness ince your last visit?	0								
	nember's health or illness ince your last visit?	0	Did th worse Cancel Confirm	0		otice or were you told y safety risks in the home	0								
	notice or were you told y safety risks in the home	0	Did you notice of were you too about any safety risks in the home today?	0	Does the	member have any taking their medication?	0								
	e member have any s taking their medication?	0	Does the member have any problems taking their medication?	0		mber looking or acting than they usually do?	0	1		3 4	5	6	7		9 (
	ember looking or acting than they usually do?	0	Is the member looking or acting different than they usually do?	0		CONTINUE		#+=			Γ	?	!		
			NO OBSERVED CHANGES						ABC		sp	ace		r	return

Figure 60. Observed Changes

CARE PLAN

Once the **Observed Changes** survey is complete, the caregiver is shown the member's **Care Plan**. The **Care Plan** is a list of activities to be performed with the member.

If all the **Care Plan** activities have been performed and there are no issues, just click **Mark All Performed** at the bottom of the screen (Figure 61).

Please note: The caregiver will also see a **Provide Additional Comments** link at the bottom of the **Care Plan** screen (Figure 61). This is a very important option when documenting visits. When leaving additional comments, the caregiver should document the member's response to the services that were provided. For example, how much of a meal the member ate, or whether the member behaved differently during this visit (Figure 62).

The caregiver can also select each **Care Plan** activity individually, and indicate whether the

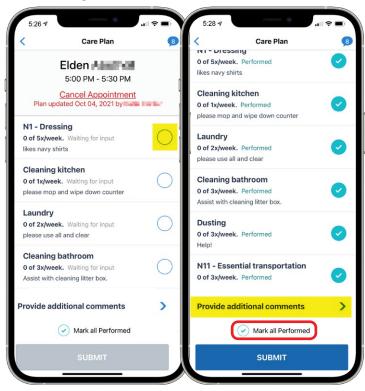
activity was Performed, Skipped, or the Client (member) Refused (Figure 62).

If marking them individually, the caregiver is required to mark all the **Care Plan** activities before selecting the **SUBMIT** button to begin **Check-Out** (Figure 62).

Figure 62. Care Plan Performed, Skipped, Refused

Additional Information Description of the services I performed for the consumer	Care Plan	6	Care Plan Plan updated Oct 05, 2021 by	6	Ha	s the	memb	Disc er fall			ne last	t visit?
I made Elden two scrambled eggs and toast. Describe the consumer's response to the services provided	Elden 5:00 PM - 5:30 PM Cancel Appointment Plan updated Oct 06, 2021 by		N1 - Dressing O of 5x/week. Performed likes navy shirts	0		den fe oorboa		e hall	way c	due to	a loo:	se
Elden ate half of his breakfast and said that he wasn't very hungry.	N1 - Dressing O of 5x/week. Performed likes navy shirts	0	Cleaning kitchen 0 of 1x/week. Performed please mop and wipe down counter	0		Ca	incel		(S	ubmit	
	Cleaning kitchen 0 of 1x/week. Skipped please mop and wipe down counter		Laundry O of 2x/week. Performed please use all and clear	0								
	Laundry O of 2x/week. Client Refused please use all and clear	•	Cleaning Stove/Refrigerator 0 of 6x/week. Skipped	8								
	Select the status this activity:		S13 - Recording and reporting of changes in vital signs to the nurse or therapist	0	1	2	3 4	5	6	7	8	9
	Performed		0 of 1x/week. Client Refused		÷		: ;	-		\$		@
	Skipped		Provide additional comments	>	#+=			÷	?	!	,	
	Client Refused		Mark all Performed		A	BC			pace			return
	Cancel		SUBMIT)						,O,

Figure 61. Care Plan Mark All Performed



CHECK-OUT

Once the **Care Plan** documentation is complete, the caregiver is presented with **Check Out** details and should confirm that all their **Observed Changes** and **Care Plan** documentation is correct (Figure 63). After reviewing, they select the **Collect Signature** button. At this point, the member has an (optional) opportunity to attest to the visit by providing their signature in the mobile app (Figure 64). Once a signature is added, the caregiver can select **APPROVE** to complete the **Check-Out** workflow and the visit. If a member cannot sign, the signature can be skipped by clicking **APPROVE** and selecting **Member Refused** or **Member Unable** (Figure 65). Once the Caregiver has selected **APPROVE**, the visit is complete (Figure 66).

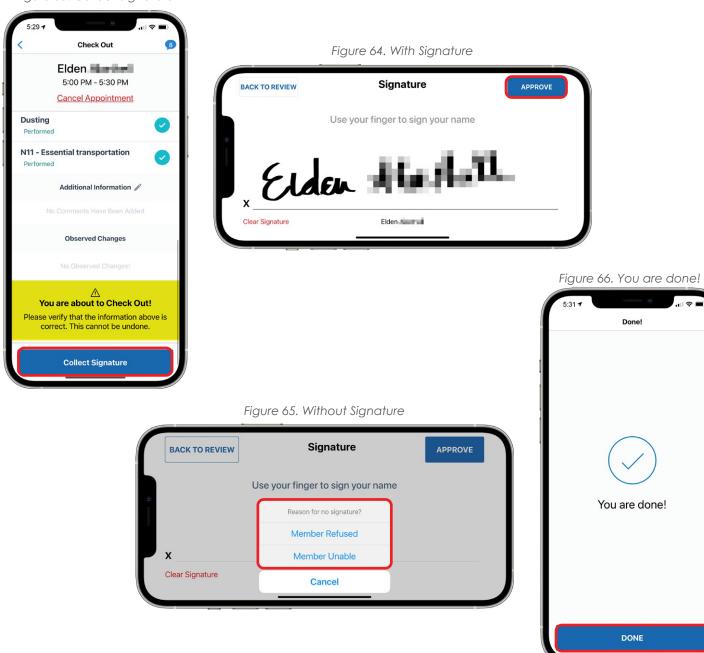


Figure 63. Collect Signature

INTERACTIVE VOICE RESPONSE (IVR)

There will be instances when the caregiver cannot utilize the CareBridge Mobile Application. In these instances, they can use the **Interactive Voice Response (IVR)** system. To Check-In and Check-Out, the caregiver will need to call the **IVR** phone line **(501) 443-4065**, from the cmember's approved phone number. Additionally, the caregiver will need to input a **Sign-Up code**, **Provider ID** and an **IVR PIN** to identify themselves during the **IVR** process. The **Provider ID** and **IVR PIN** will be provided to them by the Agency Administrator/Manager as a part of their training.

The **IVR** system will walk the caregiver through a series of interactive questions to complete the **Check-In**, **Observed Changes** survey, **Care Plan** questions, and **Check-Out**.



VISITS

The Visits page in the CareBridge Provider Portal (Figure 67) allows Agency Employees to view completed visits, pre-claim checks, and to request claims.

VIEW VISITS

The Visits page displays a tabular view of all visits that have been completed. This table can be filtered and sorted with a few parameters by selecting the **expand arrow** or the word **FILTERS** at the top of the table, or the **Sort by** drop-down at the top left of the table (Figure 68).

	VISITS												Hello, Gwynei CNG HEAITH KOHLER-RICE (16 - CC	dh! 🖯
Dashboard	PERSONAL FILTER LATE	VISITS MISSE	D VISITS	MANU	AL VISITS I	EVV VISITS	IVR VISITS	FOB VISITS						
Discussions	FILTERS													~
Authorizations	Sort by Date -	Saved Filters Select a saved filter											FXPORT FOR BILLING + MANUAL ENTRY	۲
Visits	MEMBER		START TIME	END TIME	EMPLOYEE		AUTH #	SERVICE	CHECK IN TIME	CHECK OUT TIME	PAYER	APPTID	STATUS	
Billing	Elden Abethell	08/05/2021	09:00 AM	11:00 AM	James Dean		522798531223088	\$5125	09:00 AM	11:00 AM	CB Payer	557803	Missed and Completed (Manual)	
Members	Elden Abethell	08/11/2021	09:00 AM	11:00 AM	Kay Adams		522798531223088	\$5125	09:00 AM	11:00 AM	CB Payer	557809	Missed and Completed (Manual)	
Employees	Elden Abethell	09/03/2021	09:00 AM	10:00 AM	Gwyneth Mceuen		522798531223088	\$5125	09:00 AM	10:00 AM	CB Payer	557820	Missed and Completed (Manual)	
Settings	Elden Abethell	09/05/2021	01:00 PM	02:00 PM	Gwyneth Mceuen		522798531223088	\$5125	01:00 PM	02:00 PM	CB Payer	557911	Missed and Completed (Manual)	0
	Elden Abethell	09/11/2021	03:00 PM	04:00 PM	Gwyneth Meeuen		522798531223088	\$5125	03:00 PM	04:00 PM	CB Payer	557904	Missed and Completed (Manual)	0
	Elden Abethell	09/14/2021	09:00 AM	10:00 AM	Gwyneth Mceuen		522798531223088	\$5125	09:00 AM	10:00 AM	CB Payer	557823	Missed and Completed (Manual)	0
	Elden Abetheli	09/18/2021	03:00 PM	04:00 PM	Gwyneth Mceuen		522798531223088	\$5125	12:59 PM	12:59 PM	CB Payer	557906	Missed and Completed	0
	Elden Abethell	09/27/2021	10.51 AM	11 11 AM	Katie Corder		522798531223088	\$5125	10.51 AM	11.11 AM	CB Payer	557999	Completed	
	Ana Everitt	09/27/2021	11:11 AM	11:22 AM	Katie Corder		899993197992444	\$5125	11:11 AM	11:22 AM	CB Payer	558000	Completed	
	EXPORT TO FILE												Rowa per page: 10 + 1.9 of 9 (

```
Figure 67. Visits page
```



FILTERS							\bigcirc
Search By Member Name or ID: Search By Name or ID Q	Search By Appt ID: Appt ID			Search By Auth #: Auth #	٩	Search by Employee: Search By Name or ID	٩
Date Range: 06/77/2021 - 09/77/2021	Payer: Select Payer	Sort by Date 🔹	•	Status: Completed X Missed and Completed X Early and Completed X Completed (Manual) X Late and Completed (Manual) X Massed and Completed (Manual) X	*	Service: Select	1.
Pre-Hilling Check(s) Select. • •	Check In/Out Type Select	Date Start Time End Time	×	Office(s) Select	×	Aggregation Status: Select	•
Sort by Date T Saved Filters Select a saved filter		Employee Auth #				EXPORT FOR BILLING	٥
		Service Check In Time					
		Check Out Time Appt ID Status					

VISIT DETAILS

To view more details about a visit, select the **menu icon (3 dots)** on the right side of the visit row and select **Visit Details** (Figure 69).

Figure 69	Visits page	menu	icon	(3 dots)
-----------	-------------	------	------	----------

	DATE	START TIME	END TIME	EMPLOYEE	AUTH #	SERVICE	CHECK IN TIME	CHECK OUT TIME	PAYER	APPT ID	STATUS	
Elden Abethell	08/05/2021	09:00 AM	11:00 AM	James Dean	522798531223088	S5125	09:00 AM	11:00 AM	CB Payer	557803	Missed and Completed ()	
Elden Abethell	08/11/2021	09:00 AM	11:00 AM	Kay Adams	522798531223088	S5125	09-00 AM	11:00 AM	CB Payer	557809	A Constant of Constant of Constant	Visit Details Authorization Details
Elden Abethell	09/03/2021	09:00 AM	10:00 AM	Gwyneth Mceuen	522798531223088	S5125	09:00 AM	10:00 AM	CB Payer	557820	Missed and Completed	Member Details

From the **Visit Details** screen, (Figure 70) the user can view associated data in the various cards on the (default) **DETAILS** tab as well as add *Notes* to the visit. They can also move between all the member's upcoming **APPOINTMENTS** and completed **VISITS** by selecting from the list on the left. Finally, the user can see any of the member's **ALERTS**, their **CLAIMS HISTORY**, **CARE PLAN** and **OBSERVED CHANGES** data, a **CALENDAR** style view of appointments and visits, and the member's **SCHEDULE HISTORY** (viewed by clicking the **right arrow** >) by selecting any of those options from the tabs on the right.

19/23/2821 + 12/23/2821 Sbow All 11/29/2021 2-brs (8 units) Amanda S51/25	Visit	EVV Visit	CHANGES
11/20/2021 2 hrs (8 units)		EVV Visit	
Amanda S5125	Appointment ID:	Check In Date/Time.	Nov 22, 2021 2:08 PM (app)
11/19/2021 2 hrs 29 min (10 units)	Status: Missed and Completed (Manual)	Check, Out Date/Time.	Nov 22, 2021 2:08 PM (app)
Amanda \$5125	Authorization: 522798531223088	Visit Duration:	0 hours 0 minutes
11/18/2021 1 hrs (4 units) Amanda S5125		Check In Location	An Alabama
11/18/2021 18 min (1 units)	Antonus		(0 miles away)
Amanda S5125		Check Out Location	I P. P. A. P.
11/17/2021 38 min (3 units) Amanda \$\$125			(0 miles away) No
11/16/2021 3 hrs (12 units)			Complete V
	End Location		
Gwyneth \$5125	Expected Duration: 2 hours 0 minutes (8 units)	Manual Entry	
11/11/2021 1 hrs (4 units)	Payer CB Payer		
11/09/2021 2 hrs 30 min (10 units)			Nov 22, 2021 2:09 PM Nov 22, 2021 12:08 PM
Amanda [®] \$5125	Pre-billing Issues	Check Out Date/Time:	Nov 22, 2021 2:08 PM
	02/04/2022 - The authorization associated to this visit has additional issues	Visit Duration.	2 hours 0 minutes (8 units)
11/04/2021 1 hrs (4 units)	preventing claiming.	Check In Location.	
	0/04/2022 - The provider on the appointment does not match the provider on the authorization	Check Out Location:	
11/03/2021 2 hrs (8 units) Gwyneth \$\$5125	02/04/2022 - Authorization could not be matched to a provider	Acceptable Locations:	N/A
11/03/2021 1 hrs (4 units)	If these issues have been resolved, this visit can be exported for billing.		Caregiver error
			No Attestation
+ SCHEDULE AFPOINTMENT	Pre-billing Checks VIEW RESOLVED ISSUES		
	All pre-billing checks have been resolved	Missed Visit 🧪	
		Missed Visit Reason:	Caregiver forgot to check in / out
			Service provided as scheduled
		Manual Notes;	No notes submitted.
	Unita: 8		
	Arnanda 35125 11/14/2021 18 min (1 units) S5125 11/14/2021 38 min (3 units) S5125 11/16/2021 38 min (3 units) S5125 11/16/2021 3 hs (2 (units) S5125 11/12/2021 1 hrs (4 units) S5125 11/16/2021 1 hrs (4 units) S5125 11/09/2021 2 hrs 30 min (10 units) S5125 11/09/2021 3 hrs 30 min (10 units) S5125 11/09/2021 1 hrs (4 units) S5125 11/09/2021 1 hrs (4 units) S5125 11/09/2021 1 hrs (4 units) S5125 11/09/2021 2 hrs 30 min (10 units) S5125 11/09/2021 2 hrs 30 min (12 units) S5125 11/09/2021 1 hrs (4 units) S5125 11/09/2021 2 hrs (2 units) S5125 11/09/2021 2 hrs (2 units) S5125 0 wymeth S5125	Amanda 95125 11/16/2021 18 min (19 urbs) Amanda 85125 11/17/2031 28 min (39 urbs) Amanda 85125 11/16/2021 3 her (12 urbs) Amanda 85125 11/17/2021 3 her (4 urbs) Goyveth 95125 11/06/2021 2 hrbs 20 min (14 urbs) Goyveth 65125 11/06/2021 9 hrs 20 min (14 urbs) Goyveth 65125 11/06/2021 1 hrs (4 urbs) Amanda 85125 11/06/2021 2 hrbs 20 min (14 urbs) Goyveth 7512 2 hrbs 20 min (14 urbs) Goyveth 7512 2 hrbs 20 min (14 urbs) Amanda 85125 11/06/2021 1 hrs (4 urbs) Amanda 85125 11/06/2021 2 hrbs 20 min (14 urbs) Goyveth 7512 2 hrbs 20 min (14 urbs) Amanda 85125 11/06/2021 1 hrs (4 urbs) Amanda 85125 11/06/2021 2 hrbs 20 min (14 urbs) Goyveth 7512 2 hrbs 20 min (14 urbs) Amanda 85125 11/06/2021 1 hrs (4 urbs) Amanda 85125 11/06/2021 1 hrs (4 urbs) Amanda 85125 11/06/2021 1 hrs (4 urbs) Amanda 85125 11/06/2021 2 hrbs 20 min (14 urbs) Amanda 85125 11/06/2021 2 hrbs 20 min (14 urbs) Amanda 85125 11/06/2021 3 hrs (4 urbs) Amanda 85125 11/06/2021 4 hrbs 10 min (14 urbs) Amanda 85125 11/06/2021 3 hrs (4 urbs) Amanda 85125 11/06/2021 4 hrbs 10 min (14 urbs) Amanda 85125 11/06/2021 4 hrbs 10 min (14 urbs) Amanda 85125 11/06/2021 1 hrs (4	Amada Gord Bar Socied

Figure 70. Visit Details screen

CareBridge

From the bottom of the Visit Details page, the user may utilize four actions:

- EXPORT FOR BILLING: Completed and EVV-compliant visits may be exported for billing.
- MANUAL ENTRY: Completed for visits not captured using the EVV app or IVR, or to edit an EVV visit.
- **RESCHEDULE:** If the user is an Admin or an Admin-Office assigned to that office, they may reschedule appointments.
- **CANCEL VISIT:** If the user is an Admin or an Admin-Office assigned to that office, they may cancel the visit.

EXPORT MEMBER CARE PLAN ACTIVITIES

From the **Visit Details** screen, under the **CARE PLAN** tab, the user may export a list of care plan activities for each visit by clicking on the **EXPORT** button in the top right of the screen (Figure 71). This file can be retrieved in the Settings section, under the **DOCUMENTS** sub-tab.

See the <u>Check-In & Check-Out</u> section for more information on how the **Care Plan** is presented to caregivers for completion as part of a visit.

1		VISITS > DETAIL > 558363						CNG H	Hello, Gwynet IEALTH KOHLER-RICE (16 - CS	th! 🖯
D	Dashboard	ELDEN E Primary Phone:	Primary Address:							
-	Discussions	APPOINTMENT	s visits	DETAILS	ALERTS	CLAIMS HISTORY	CARE PLAN	OBSERVED CHANGES	CALENDAR	
	Authorizations		- 12/30/2021	FILTERS					T EXPORT	
Ø	/isits	11/20/2021 Amanda	2 hrs (8 units) \$5125							0
в	Billing	11/19/2021 Amanda	2 hrs 29 min (10 units) 85125		FREQUENCY		COMMENT	RESPONSE		
	vembers	11/18/2021 Amanda	1 hrs (4 units) \$5125		5x per week		likes navy shirts	Completed		
F	mployees	11/18/2021 Amanda	18 min (1 unite) \$5125	Cleaning kitchen	1x per week		please mop and wipe down counter	Completed		
¢ s	Settings	11/17/2021 Amanda	38 min (3 units) 35125	Launary	2x per week		please use all and clear	Completed		
		11/16/2021 Amanda	3.hrs (12 units) \$5125		3x per week			Completed		

FIGURE 71. CARE PLAN screen EXPORT button

MANUAL ENTRY

In some cases when an EVV Check-In or Check-Out cannot be completed or there is a need to edit an EVV Check-In or Check-Out, an employee can complete a **Manual Entry**.

For a visit that does not have an EVV Check-In and Check-Out, navigate to the visits page and select the **+ MANUAL ENTRY** button from the top right of the table, then the **Manual Visit Entry** option from the drop-down menu (Figure 72).

Figure	72.	Manual	Visit	Entry
--------	-----	--------	-------	-------

PERSONAL FILTER LATE VISI	ITS MISSED VISITS	MANUAL VISITS	EVV VISITS	IVR VISITS FOR VISITS							
FILTERS											~
	ved Filters elect a saved filter									- MANUAL ENTRY	0
MEMBER	DATE S	TART END TIME EMP	PLOYEE	AUTH #	SERVICE	CHECK IN TIME	CHECK PAYER OUT TIME	APPTID		-OB Visit Entry	
Elden Abethell	08/05/2021 0	9:00 AM 11:00 AM Jam	nes Dean	522798591223088	\$5125	09:00 AM	11:00 AM CB Payer	557803	Missed and Completed	(Manual)	

The **Manual Entry** dialog will open, allowing the user to enter information about the visit and a **Manual Reason Code** indicating why an EVV Check-In or Check-Out was not possible (Figure 73).

Figure 73. Manual Entry dialog

lember		Authorization		Appointment (optional)	
Select Member	•	Select Auth		Unassigned	-
mployee		Status		Billing Status	
Select Employee	•	Completed (Manual)		Pending	
ervice Code		Modifiers		Location	
				Select Location	
heck-In Date/Time		Check-Out Date/Time		Visit Duration	
	Ē		Ē	None	
heck In Location		Check Out Location		Acceptable Locations	
lone		None		N/A	
ayer		Notes			
Select Payer	*	Estavata			
Ianual Reason Code		Enter a note			
Select Reason Code					
		🕅 Attach File			

In cases in which a visit does have an EVV Check-In and/or Check-Out, but has details that need to be edited, the user may navigate to **Visit Details** and select the **MANUAL ENTRY** button at the bottom of the screen to edit the visit.

EXPORT FOR BILLING

Once a visit is completed and ready to be claimed, Agency Administrators may export by selecting the **check box** next to one or many visits and then selecting the **EXPORT FOR BILLING** button at the top right corner of the table (Figure 74).

	VISITS						Hello, Gwyne CNG HEALTH KONLER-RICE (16 - C	eth! 😑
Dashboard	PERSONAL FILTER LATE	VISITS MISSED VISITS MANUAL VISITS EVV VISITS	IVR VISITS	FOB VISITS				
Discussions	FILTERS							~
Authorizations	Sort by Date	Saved Filters Select a saved filter.				(0
Appointments						·		
🧭 Visits		DATE CHECK IN CHECK EMPLOYEE TIME OUT TIME	AUTH #	SERVICE	PAYER	APPT ID	STATUS	
Billing	Elden	01/11/2022 10:44 AM 10:45 AM Amanda	100.00	\$5125	CD Payer	550792	Completed	9 :
Members	Elden	01/13/2022 04:06 PM 04:06 PM Amanda	1.5	\$5125	CB Payer	558386	Missed and Completed	0 :
Employees	Elden and a	01/20/2022 10:05 AM 10:11 AM Amanda		\$5125	CB Payer	558922	Completed	9 :
Settings	Elden 🔐	02/01/2022 12:00 PM 12:30 PM Kay		\$5125	CB Payer	559022	Completed (Manual)	• :
	Elden	02/02/2022 10:00 AM 11:00 AM Kay	1000	\$5125	CB Payer	558865	Missed and Completed (Manual)	0 :
	Elden	02/07/2022 01.59 PM 03:59 PM Kay	and some	\$5125	CB Payer	559061	Completed (Manual)	0 :

Figure 74. EXPORT FOR BILLING

Once the **EXPORT FOR BILLING** button is selected, the user will be presented with a confirmation indicating that the visits they selected were successfully exported for claims or if they were not exported due to failing a Pre-Billing Check (Figure 75).

4 Visits will be e	exported for billing	and will be a	vailable for viewing	on the Billing Page		
MEMBER	DATE	APPT ID	STATUS	PAYER	BILLING ACTION	
Elden	01/11/2022		Completed	CB Payer	Bill through EVV	•
Elden	01/20/2022		Completed	CB Payer	Bill through EVV	•
Elden	02/01/2022		Completed (Manual)	CB Payer	Bill through EVV	•
Elden	02/07/2022		Completed (Manual)	CB Payer	Bill through EVV	

Pre-Billing Checks are visible on the Authorizations, Appointments, Visits, and Billing pages and are denoted with a **red exclamation icon**. By clicking the **red exclamation icon**, the Pre-Billing check is shown in detail (Figure 76).

Elden	12/03/2021 09:00 AM 09:30 AM Amanda	\$5125	CB Payer	558376	Late and Completed (Manual)	:
Elden	12/06/2021 08:00 AM 10:20 AM Amanda	S5125	CB Payer	558379	Appointment has no duration Missed reason is missing on the	1
Elden	12/06/2021 08:55 AM 08:55 AM Amanda	\$5125	CB Payer	550370	appointment. A payer data issue is currently	0:
Elden	12/06/2021 10:00 AM 12:10 PM Gwyneth	\$5125	CB Payer	558527	Completed (Manual)	:

Additionally, Pre-Billing Checks can be viewed on each page by filtering using the **Pre-Billing Check(s)** dropdown menu (Figure 77). Figure 77. Pre-Billing Check(s) filter drop-down menu

Pre-Billing Check(s):	
Select	•
All Pre-Billing Checks	-
No Pre-Billing Checks	
Appointment Is Outside The Timely Filing Window For Billing	
Auth Terminated	
Caregiver License Number Required	
Caregiver Overlapped Service	
Caregiver With No Birthdate	-

The following table (Figure 78) is a full list of Pre-Billing Checks performed in the CareBridge Solution and potential opportunities to resolve the Pre-Billing Check to be able to submit the visit for billing.

ç	-						
PRE-BILLING CHECK	WHO RESOLVES	RESOLUTION					
No authorization available during the appointment	MCO/PASSE	MCO issues a new authorization or clarifies					
Member is ineligible during the appointment	MCO/PASSE	MCO changes eligibility or clarifies					
Manual entry reason is missing on the appointment	PROVIDER	Provider updates the visit with a reason					
Late reason is missing on the appointment	PROVIDER	Provider updates the visit with a reason					
Missed reason is missing on the appointment	PROVIDER	Provider updates the visit with a reason					
The appointment occurred outside of an authorization	MCO/PASSE	MCO updates authorization or clarifies					
The visit has a claim in progress and is locked	PROVIDER	Provider views claim status and takes appropriate action					
The Payer has marked the provider as inactive during appointment	MCO/PASSE	MCO re-activates the provider or clarifies					
The claim has been denied by the Payer	PROVIDER	Provider views claim status and acts					
Caregiver is ineligible during the appointment	PROVIDER	Provider ensures caregiver is eligible to deliver services					
The claim has been rejected	PROVIDER	Provider views claim status and acts					
Appointment has 0 units to bill	PROVIDER	Provider updates the visit via manual entry with units in order to bill					
Appointment service code has no rate or unit definition	PROVIDER	Provider completes a manual entry to bill					
Appointment has a terminated authorization	MCO/PASSE	MCO updates the authorization or clarifies					
Appointment exceeds the authorization/segments max units	PROVIDER	Provider completes manual entry that reduces units to allow billing, or requests additional units from the MCO/PASSE					
Caregiver has no birth date set	PROVIDER	Provider updates caregiver birth date					
Appointment has no attestation	MEMBER	Member attests through member portal					
Appointment has a caregiver without a license #	PROVIDER	Provider adds a caregiver license ID in employee details					

Figure 78. Pre-Billing Checks and Resoultions table

PRE-BILLING CHECK	WHO RESOLVES	RESOLUTION
User has no Medicaid ID set	PROVIDER	Provider adds a worker Medicaid ID in employee details
Appointment has no duration	PROVIDER	Provider completes a manual entry to update the visit duration
Early reason is missing on the appointment	PROVIDER	Provider updates the visit with an early reason
Appointment has no service modifier	Provider updates the visit in appointment visit details to include a service modifier	

VISITS REPORTS

By default, the **PERSONAL FILTER** is selected upon navigating to the Visits page. It can be used to filter and sort the Visits table in a variety of ways to return the subset of visits that is most useful. In addition to the **PERSONAL FILTER**, there are five reports that have predefined filters to help quickly navigate to useful visits (Figure 79).

Figuro	70	Vicito	naaa	reports
riguie	17.	A 12112	puge	repons

PERSONAL FILTER	LATE VISITS	MISSED VISITS	MANUAL VISITS	EVV VISITS	IVR VISITS
FILTERS					

- **EARLY VISITS:** This report returns a list of all visits that have been completed but were started early. A visit is considered early when a Check-In occurred 7 minutes or more before the appointment start time.
- LATE VISITS: This report returns a list of all visits that have been completed but were started late. A visit is considered late when a Check-In occurred 7 minutes or more after the appointment start time.
- **MISSED VISITS:** This report returns a list of all missed visits. A visit is considered missed when a Check-In did not occur 30 minutes or more after the appointment start time.
- MANUAL VISITS: This report returns a list of all Manual Entry visits.
- **EVV VISITS:** This report returns a list of all completed visits that have compliant EVV data.
- IVR VISITS: This report returns a list of all completed IVR visits.

To export any of the data on the Visits Page to a **PDF**, **XLS**, or **CSV** file, select the **EXPORT TO FILE** button on the bottom of the page (Figure 80). Upon selecting the file type, the document will begin downloading and will be available on the Settings Page under the **DOCUMENTS** sub-tab.



Figure 80. Visits page **EXPORT TO**

BILLING

The Billing page in the CareBridge Provider Portal (Figure 81) allows agency employees to view completed visits that have been claimed, enabling them to address denials, rejections, and paid amounts. Figure 81. Billing page

	BILLING													CNG HEALTH KO	Hello, Gwyneth! HLER-RICE (16 - CST)	0
Dashboard	PERSONAL FILTER	REJECTED VISI	ITS DENIED V	ISITS												
Discussions	FILTERS															
Authorizations Appointments	Sort by Date	*												EXPOR	T FOR BILLING	0
Visits	MEMBER	DATE	CHECK IN TIME	CHECK OUT TIME	E UPDATED DATE	EMPLOYE	E AUTH	# SERVICE	APPT ID	CLAIM #	PAYER	STATUS	BILLED AMOUNT	PAID AMOUNT	BILLING STATUS	
Billing	Artemis	12/11/2020	02:00 PM	04:00 PM	01/04/2021	Kristen	(and	\$5125	1.44		CB Payer	Completed (Manual)	\$20.00	S0.00	Billed Externally	
Members	Dorian	12/10/2020	09:00 AM	10:00 AM	01/04/2021	Krystal		\$5125	1054		CB Payer	Completed (Manual)	\$10.00	\$0.00	Billed Externally	
Employees	Artemis Artemis	12/09/2020	03.02 PM	03.08 PM	01/04/2021	Kristen	and the	\$5125			CB Payer	Late and Completed	\$0.00	\$0.00	Billed Externally	
Settings	Geoffry	12/09/2020	11:00 AM	12:05 PM	12/09/2020	Kristen	1941	S5130	10.41		CB Payer	Completed (Manual)	\$20.00	\$0.00	Billed Externally	
	Dorian	12/09/2020	09:00 AM	10:31 AM	12/09/2020	Kristen	-	\$5125	-		CB Payer	Completed (Manual)	\$15.00	S0.00	Billed Externally	
	Doc	12/07/2020	12:39 PM	03:25 PM	01/04/2021	Gwyneth	-	\$5130	1.00		CB Payer	Completed	\$55.00	\$0.00	Billed Externally	
	🗌 Willy	12/04/2020	05.00 PM	07.00 PM	01/04/2021	Andrew		\$5125	1000		CB Payer	Completed (Manual)	\$20.00	\$0.00	Billed Externally	
	Tamarra	12/03/2020	09:16 AM	10:30 AM	12/09/2020	Andrew	10000	\$5130	1010		CB Payer	Completed (Manual)	\$25.00	\$0.00	Billed Externally	
	Alejandro	12/03/2020	06:00 PM	10:00 PM	12/14/2020	Andrew		\$5130	10.000		CB Payer	Completed (Manual)	\$560.00	\$0.00	Billed Externally	
<	Dorolice	12/03/2020	01:00 PM	03:00 PM	12/03/2020	Andrew		\$5130			CB Payer	Completed	\$20.00	\$0.00	3 SBilled Externany	upp

VIEW BILLED VISITS

On the Billing page, the user will see a tabular view of all visits that have been claimed. This table can be filtered and sorted with several parameters by selecting the **expand arrow** or the word **FILTERS** at the top of the table or the **Sort by** drop-down at the top left (Figure 82).

FILTERS						\bigcirc
Search By Member Name or ID: Name or ID	Q	Search By Appt ID: Appt ID	Search By Auth #: Auth #	Search By I Payer Clain	Payer Claim #: n #	٩
Search by Employee: Search By Name or ID	Sort by Date -	Start Dates: 06/27/2021 - 09/27/2021	Update Dates: 06/27/2021 - 09/27/2021	Payer: Select Paye	er	•
Status: Select Status	Member A	Service: Select Service	Billing Status: Select Billing Status	Pre-Billing Select	Check(s):	•
Check In/Out Type: Select	Check Out Time Updated Date	Office(s):	Aggregation Status: Select	·		
C RESET FILTERS SAVE FILTERS	Employee Auth #					
Sort by Saved Filt	1	1.			EXPORT FOR BILLING	Ø
	Paver					

Figure 82. Billing page **FILTERS, expand arrow**, and **Sort by** drop-down menu options

*

CLAIMS HISTORY

Once a completed visit has been exported for claims, the user will be able to view details about the billing status and claim information by selecting the **menu icon (3 dots)** on the right side of the row for the visit and then selecting **Visit Details** (Figure 83).

Figure	83.	Billina	paae	Visit	Details	link
119010	00.	Dininig	page			

MEMBER	DATE	CHECK IN	CHECK OUT	UPDATED	EMPLOYEE AUTH #	SERVICE	APPT ID	CLAIM #	PAYER	STATUS	BILLED	PAID	BILLING
		TIME	TIME	DATE							AMOUNT	AMOUNT	STATUS
Elden	09/14/2021	09:20 AM	10:20 AM	09/16/2021	Gwyneth	\$5125	1		CB Payer	Completed (Manual)	\$10.00	\$0.00	Generated
Elden	09/04/2021	03:00 PM	04:00 PM	09/16/2021	Gwyneth	\$5125	-		CB Payer	Missed and Completed (Manual)	\$10.00	\$0.00	Generated : Visit Details
Elden	08/29/2021	01:00 PM	02:00 PM	08/31/2021	Gwyneth	\$5125	-		CB Payer	Completed (Manual)	\$10.00	\$0.00	Authorization Details Member Details

Visit Details will provide information for the billing status in the *Billing* card (Figure 84) as well as claims information in the **CLAIMS HISTORY** tab.

Dashboard Discussions	Member ID: Primary Phone:	Primary Address:						
	APPOINTMENT	IS VISITS	DETAILS	CLAIMS HISTORY	CARE PLAN	OBSERVED	CALENDAR	SCHEDULE
Authorizations	08/21/2021	- 10/21/2021						
Appointments		Show All	Visit			EVV Visit		
Visits	09/27/2021 Katle Corder	19 min (1 units) \$55125	Appointment ID:	100		Check in Date/Time:	Sep 27, 2021 10:51 AM (app)	
Billing	09/21/2021	16 hrs 54 min (68 units)	Status	Completed		Check Out Date/Time:	Sep 27, 2021 11 11 AM (app)	
Dining	Katie	\$5125	Authorization		- 0	Visit Duration:	0 hours 19 minutes (1 units)	
Members	09/18/2021 Gwyneth	1 hrs \$5125	Employee:	Katie		Check In Location	ALC: NO.	
Employees	09/14/2021	1 hrs (4 units)	Start Date/Time:	Sep 27, 2021 10:51 /		Check Out Location	A REAL PROPERTY.	
Settings	Gwyneth 09/14/2021	\$5125 Thrs (4 units)	End Date/Time:	Sep 27, 2021 10:017		Uneck Out Location	100	
Serunda	Gwyneth	\$5125	Start Location:			Acceptable Locations	Yes	
	09/11/2021 Gwyneth	1 hrs (4 units) \$5125	End Location.			Member Attestation	Complete 🗸	
	09/05/2021 Owyneth	1 hrs (4 units) \$5125	Expected Duratio	n: 0 hours 19 minutes (1 units)			
	09/04/2021	1 hrs (4 units)	Payer	CB Payer				
	Gwyneth 09/03/2021	\$5125 1 hrs (4 units)				1		
	Gwyneth	\$5125	Billing					
	08/29/2021 Gwyneth	1 hrs (4 units) \$5125	Service Code: Modifiers:	S5125 None				
			Billing Status.	None				
			Units	None		J		
	+ SCHEDULE APPOINTMENT		Add Note					
			Attach File				CAP	ICEL SAVE
								-
			EXPORT FOR	BILLING	MANUAL ENTRY	RESCHEDULE	CANC	EL VISIT

Figure 84. Billing page Visit Details screen

The **CLAIMS HISTORY** tab will display the Billed Amount, Accepted Amount, Rejected Amount, Paid Amount, and Denied Amount for the visit. The user may also be able to access each individual claim request that was generated at the time the visit was exported for a claim, as well as the individual statuses, claim number(s), and dates associated with the status changes (Figure 85).

Dashboard	ELDEN E								
Discussions	Member ID. Primary Phone.	Primary Address:	Contraction in the second	i and a					
Authorizations	APPOINTMENTS	VISITS	DETAILS	CLAIMS H	STORY	CARE PLAN	OBSERVED CHANGES	CALENDAR	SCHEDULE HISTORY
	07/11/2021 - 09	(11/2021						-	
Appointments	Show /	All	Billing					VOID VISIT	
Visits	09/11/2021 Gwyneth	1 hrs (4 units) \$5125	Billed Amount		\$0 (0 units)				
Billing	09/05/2021 Gwynoth	7 hrs (4 units) \$5725	Accepted Amount		\$0 (0 unite)				
Members	09/04/2021	1 hrs (4 units)	Rejected Amount		\$0 (0 units) \$0 (0 units)				
	Gwyneth	\$5125	Denied Amount		SO (O units)				
Employees	09/03/2021 Gwyneth	1 hrs (4 units) \$5125							
Settings	08/29/2021 Gwyneth	1 hrs (4 units) 85125	Claim Request Katie - 08/18/2				VIEW C	LAIM DETAILS	
	08/16/2021 Gwyneth	1 hrs (4 units) \$5125	CLAIM #	PAYER CLAIM #	STATUS	EXTERNAL STATUS CODE	DETAILS	DATE/TIME	
	08/11/2021 Andrew	1 min S5125	IA 1496	N/A	Prebilling Rejection	C2002	Appointment has 0 units to bill	08/18/2021, 03:15 PM	
	08/11/2021 Kay	2 hrs (8 units) \$5125	IA1496	N/A	Queued			08/18/2021, 03:15 PM	
	08/05/2021 Andrew	1 hrs (4 units) \$5125							
	08/05/2021 Jameo	2 hrs (8 units) \$5125							
	08/03/2021 Andres	1 hrs (4 units) \$5125							
	07/30/2021 Gwyneth	1 hrs (4 units) 85125							
	07/28/2021	2 hrs (8 units)							

Figure 85. Claims History Details

EXPORT FOR BILLING

If a visit needs to be resubmitted for a claim, agency employees can export by selecting the **check box** next to one or many visits and then selecting the **EXPORT FOR BILLING** button at the top right corner of the table (Figure 86).

Figure 86.	. Billing page	EXPORT FOR	BILLING button
------------	----------------	-------------------	-----------------------

Sort by Date +	Saved Filt Select a s		*										EXF	PORT FOR BILLING	0
MEMBER	DATE	CHECK IN TIME	CHECK OUT TIME	UPDATED DATE	EMPLOYE	E AUTH#	SERVICE	APPT ID	CLAIM #	PAYER	STATUS	BILLED AMOUNT	PAID AMOUNT	BILLING STATUS	
Elden	09/21/2021	05:46 PM	10:40 AM	09/25/2021	Katie	1000	S5125			CB Payer	Completed	\$170.00	\$0.00	Generated, Generated	:
🔽 Friederike	08/17/2021	03:59 PM	04:04 PM	08/31/2021	Andrew		S5130	1000		CB Payer	Completed	\$0.00	\$0.00	Prebilling Rejection	:
Friederike	08/12/2021	12:26 PM	12:29 PM	08/30/2021	Andrew	-	\$5130			CB Payer	Completed	\$0.00	\$0.00	Prebilling Rejection	;
Elden	08/11/2021	09:25 AM	09:26 AM	08/18/2021	Andrew	1204	\$5125	12781		CB Payer	Completed	\$0.00	\$0.00	Prebilling Rejection	:

The following billing statuses (Figure 87) are available in the CareBridge Solution and can be seen associated with Claim Requests.

Figure 87	. Table o	f Billing	Status	Definitions
-----------	-----------	------------------	--------	-------------

BILLING STATUS	DEFINITION
Acknowledged	This visit's claim has been received by MCO/PASSE.
Accepted	This visit's claim request was accepted by MCO/PASSE due to sufficient or valid data upon initial review.
Billed Externally	This visit was billed by an external EVV vendor.
Cancelled	This visit's claim request was cancelled.
Confirmed	This visit has a claim that was accepted by MCO/PASSE.
Denied	This visit's claim request was denied by PASSE due to insufficient or invalid data upon review.
Generated	This visit has a claim request that has been generated.
Joint Claim Processing	This visit has a claim request that is paused due to prior in-flight claim request(s) still being processed. The Joint Claim Processing claim request will be submitted for billing once the prior claim request(s) enter a terminal status (paid or denied).
Paid	This visit's claim was paid by MCO/PASSE.
Pending	This visit's claim request has not yet been exported for billing.
Prebilling Rejection	This visit was rejected due to insufficient or invalid data prior to a claim request being generated.
Queued	This visit has been queued for claim request generation.
Rejected	This visit's claim request was rejected by MCO/PASSE due to insufficient or invalid data upon initial review.
Submitted	This visit has a claim request that has been submitted to MCO/PASSE.
Voided	This visit's claim was voided.
Voided Externally	This visit's claim was voided by an external EVV vendor.

BILLING REPORTS

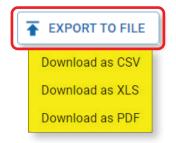
By default, the **PERSONAL FILTER** is selected upon navigating to the Billing Page. It can be used to filter and sort the Billing table in a variety of ways to return the subset of billed visits that is most useful. In addition to the **PERSONAL FILTER**, there are two reports that have predefined filters to help quickly navigate to useful billed visits data (Figure 88).

PERSONAL FILTER	REJECTED VISITS	DENIED VISITS
FILTERS		

- **Rejected Visits:** This report returns a list of all visits with rejected claims.
- **Denied Visits:** This report returns a list of all visits that have denied claims.

To export any of the data on the Billing page to a **PDF**, **XLS**, or **CSV** file, select the **EXPORT TO FILE** button on the bottom of the page (Figure 89). Upon selecting the file type, the document will begin downloading and will be available on the Settings page under the **DOCUMENTS** sub-tab.

Figure 89. Billing page **EXPORT TO FILE** drop-down menu options



COMMUNICATIONS

OVERVIEW

The following sections will help introduce you to the features within the CareBridge Solution that enable communication both within a Provider Agency as well as between a Provider Agency and PASSE.

DISCUSSIONS

The Discussions page in the CareBridge Provider Portal (Figure 90) allows Agency employees to manage and prioritize inbound communications, act on critical tasks, and communicate within the Agency as well as with PASSE.

DISCUSSIONS NAVIGATION

On the Discussions page, the user will see a list on the left of all open discussions that are currently unassigned. This list can be filtered by **Status**, **Assigned to Me**, **Type**, **Internal/Shared**, and several other fields that are viewed by selecting the **expand arrow** on the right of the drop-down menus.

1		DISCUSSION	IS					Hell CNG MEALTH KOHLER-	o, Gwyneth! 😑
Ħ	Dashboard	Status: Select	t 👻 Assigned to Me: 🔲			DETAILS AP	POINTMENTS	VISITS	
P	Discussions	Type: Select	t 🗸 Internal/Shared: Sele	at •	Donald	Primary Address:			
â	Authorizations	Observ			Created by:	Gwyneth	Created date:	02/16/2022 3:44 PM	
	Appointments	Addres	ee	_	Type:	Message	Last Updated Date:	02/16/2022 3:44 PM	
-		Reque		۹	Subject:	Loss of appetite	Status:	Open	×
0	Visits	Phone	Request	Q	Description:	Donald only ate half of his normal breakfast this			
-		Messa		<u>~</u>		morning. He said he's not hungry. I asked, and he hasn't been snacking.	e Assigned to:	Gwyneth	
血	Billing			=		naan Geen angeleng.	Share with payer.	Select	
\odot	Members			-					
			ated Dates: 28/2022 - 03/28/2022	-			INTERNAL		
	Employees			-					
			EXPORT TO FILE		Leave a comment				
-	Sattinge				Enter a comment				
		Sec. 1		-	Enter a comment				
\$	Settings	-							
				teres 1	0 Attach File				2000 C 1000 C
A	Provider Admin				U Attach File				CANCEL SEND
		Donald	2/16/2023	2 3:44 PM					
		Message		-					
		Subject: Loss o	2						
		Subject: Loss o	or appetite	Open					
			1-2 of 2	$\langle \rangle$					
		+ NEW DI	ISCUSSION						

Figure 90. Discussions page and navigation

NEW DISCUSSION

There are four different types of Discussions that can be sent and received (Figure 91):

- **Observed Changes:** This Discussion type allows caregivers to indicate if there have been any changes to the member's condition. **Observed Changes** items are generated as part of the survey completed by caregivers during a visit. When **Observed Changes** occur, a Discussion will be auto generated and sent to the Discussions page for both the Provider and PASSE.
- Address Request: This Discussion type allows Providers to request a new or updated member address from PASSE. When an Address Request occurs, a Discussion will be auto generated and sent to the Discussions page for both the Provider and PASSE.
- Phone Request: This Discussion type allows Providers to request a new or updated member phone number from PASSE. When a Phone Request occurs, a Discussion will be auto generated and sent to the Discussions page for both the Provider and PASSE.

Figure 91. Discussion Type drop-down

Status:	Select 📔 👻	Assigned to Me:					
Type:	Select 🗸 🔻	Internal/Shared: Select					
	Observed Changes						
	Address Request Phone Request Message	≥or ID Q Q					
	Created Date	s: - 10/28/2021 💼					
	Updated Date 08/28/2021	·s: - 10/28/2021					
	•	EXPORT TO FILE					
Observ	Friederike Wathall 9/28/2021 8:21 AM Observed Changes						
		1-7 of 7 < >					
+	NEW DISCUSSION						

• **Message:** This Discussion type can be used for general messages between Agency employees or between an Agency and PASSE.

To create a new Message Discussion, select the **+ NEW DISCUSSION** button at the bottom of the page (Figure 92). The New Discussion dialog box will appear. After selecting a Discussion **Type**, the user will need to complete the required fields before sending.

		New Discussion	×
New Discussion Type Message		If this is an urgent matter, please contact the case manager / care coo	rdinator directly.
Created by Gwyneth Mceuen	Member Member	Assigned to (optional))
Status Open	Subject	Share with payer (optional) Share with payer	
Description			
		CANCEL SEND	

Figure 92. New Discussion dialog

DISCUSSION ITEM DETAILS

Upon selecting a Discussion, the user will see details about that Discussion in the **DETAILS** tab on the right side of the screen (Figure 93). Optionally, the user may choose to view upcoming **APPOINTMENTS** and past **VISITS** for that member by selecting the other tabs available at the top of the screen.

Status: Select 💌 Assigned to Me:		DETAILS		APPOINTMENTS		VISITS	
Type. Select	Internal/Shared. Select	Aloysius Primary Phone	: Primary Address:				
Aloysius Message Towney Message Kile	5/05/2020 11:09 AM Closed 5/05/2020 11:09 AM In Progress 4/16/2020 11:27 PM	Created by: Type: Subject: Description:	Scott Message Wheelchair and ramp The member has decreased mot may need a wheelchair or walker need a ramp home modification.	. Will also Assigned to:	04/16/2020 05/05/2020 Closed Select C8 Payer	• •	
Message Barbaraanne Message	0pen 4/16/2020 11:27 PM 0pen	Leave a comment	INTERNAL		SHARED		
Hube Message	4/16/2020 11:27 PM	Enter a comment			CAN	CEL SEND	
Conny Message Wayne	4/16/2020 11:27 PM Open 4/16/2020 11:27 PM						
Message + NEW DISCUSSIO	Opon ,						

Figure 93. Discussion Details

There are several actions and filters that can be utilized within Discussions:

- Status: To track progress on a given Discussion, the user can update the Status. Statuses available are Open, In Progress, and Closed.
- Assigned to: To better manage tasks across a Provider agency, the user can choose to assign Discussions to a Caregiver.
- Internal/Shared: If the user needs to send the Discussion to PASSE, they can do so by selecting the Shared option from this drop-down.
- **Comments:** At the bottom of the Discussion, there are two tabs: **INTERNAL** and **SHARED**. Both tabs allow for comment threads to communicate about the item. The **SHARED** tab will only be available if the **Shared** option is chosen. Discussion with PASSE can be facilitated through entering comments in the **SHARED** tab.

DASHBOARD & REPORTING

OVERVIEW

This section will introduce the features and functionality within the CareBridge Solution that enable Provider Agency employees to view key graphs, metrics, and data related to operational efficiency.

DASHBOARD

The CareBridge Provider Portal Dashboard page (Figure 94) allows Agency employees to view key metrics to better prioritize and manage tasks on which action may need to be taken. Across the top of the Dashboard page, there are tabs for each of the additional Dashboards.

	DASHBOARD				1	Hello, Gwyneth!
Dashboard	OVERVIEW	COMPLIANCE	BILLING	AUTHORIZATIONS	MEMBERS	APPOINTMENTS & VISITS
Discussions	Items Outstanding					
Authorizations	_					
Appointments			血	7		7
Ø Visits		2		19	g g)
Billing		Unacknowledged Auths		Unbilled Visits	Open Discussio	
5 Members						
Employees	Today					
Settings	Late Visits 7	7 New Authorizat	tions 12	٦		
	Missed Visits 4 7	Updated Authoriza	tions 3 7		22 Visit Comple	
	Manual Entry Visits	7 New Mem	bers 6 7			
					51 Appointments	Scheduled 🧷

Figure 94. Dashboard page

- **OVERVIEW:** This dashboard displays metrics related to items that are outstanding or may require action and metrics related to operational efficiency within the Provider Agency today.
- **COMPLIANCE:** This dashboard displays metrics to better understand how many completed visits are EVV compliant and how many are the sources of non-compliance.
- **BILLING:** This dashboard displays metrics related to the revenue cycle of completed visits in the CareBridge Solution.
- **AUTHORIZATIONS:** This dashboard helps Agency employees better understand the number of active authorizations and authorizations by service type.
- **MEMBERS:** This dashboard helps Agency employees explore the number of active members.
- **APPOINTMENTS & VISITS:** This dashboard displays metrics related to the number of scheduled appointments and completed visits.

Each of the dashboards can be filtered by date range or Payer (PASSE). By selecting the **arrow icon** on the top right corner of each metric or graph (Figure 94), the user will be taken to a report that displays the data that makes up that metric or graph.

REPORTS

In addition to the **PERSONAL FILTER** that is available on the Authorizations, Appointments, Visits, Billing, Members, and Employees pages, there are also reports that have predefined filters to help quickly navigate to other useful subsets of data. The following table (Figure 95) is a complete list of the reports available in the CareBridge Provider Portal:

REPORT NAME	PAGE	DESCRIPTION (EVV DATA)
Active Members	Members	All active Members.
Denied Visits	Billing	All Visits that have denied claims.
Employees Compliance	Employees	All Provider Employees sorted in ascending order by Compliance Score. Compliance Score is configurable per PASSE but is typically defined as 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, late, or missed.
EVV Visits	Visits	All completed Visits that have compliant EVV data.
Late Appointments	Appointments	All appointments that are late. An appointment is considered late when a Check-In has not occurred within one hour of the appointment start time.
Late Visits	Visits	All visits that have been completed but were started late, as an example, a Visit could be late when a Check-In has not occurred within 15 minutes of the appointment start time.
Manual Visits	Visits	All Manual Entry Visits.
Members Compliance	Members	All Members sorted in ascending order by Compliance Score. Compliance Score is configurable per PASSE but is typically defined as 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, late, or missed.
Missed Appointments	Appointments	All appointments that have been missed. An appointment is considered missed when a Check-In has not occurred within three hours of the appointment start time.

Figure 95. Provider	al Poports tabl	\sim
FIQUIE 95. FIOVIDEI	ממו גבטסווג ומטו	e
iguic /J. Hovider	ai nepons iao	Ľ

REPORT NAME	PAGE	DESCRIPTION (EVV DATA)			
Missed Visits	Visits	All missed visits. A visit could be considered missed when a Check-In has not occurred within one hour of the appointment start time.			
Payroll Employees		Payroll data for a given period for each Employee based on completed Visits in that time period.			
Rejected Visits	Billing	All Visits that have rejected claims.			
Unacknowledged Authorizations	Authorizations	All Authorizations that have not yet been acknowledged.			
Unassigned Authorizations	Authorizations	All Authorizations that have not yet been assigned an Employee.			
Unassigned Members	Members	All Members who have not been assigned to an Office.			

SETTINGS

OVERVIEW

This section introduces the user to the features within the CareBridge Solution that enable Provider Agency employees to configure the system to their workflows and preferences.

On the Settings page (Figure 96), there are sub-tabs for **Offices**, **Groups**, **Documents**, **Rates**, **Billing**, and **Vendor**.

	SETTINGS	_					ENG HEALTH KOHL	Hello, Gwyneth!
Dashboard	Officers Set up and manage offices	OFFICES	i					+ NEW OFFICE
Authorizations Appointments	Groups Set up and manage ansups	NAME	ADDRESS	ADDRESS 2	СІТУ	STATE	ZIP CODE	0
 Visits Billing Members 	Documents View and download documents	Main Office					Rows per page: 10 👻	1eH1 (1)
Employees	Rates Manage service codes and rates							
	fulling Mansee claims generation options							
	Vendor View vendor details	J						

Figure 96. Settings page

OFFICES

Offices are a way for Provider Agencies to configure multiple locations with the CareBridge Provider Portal. Employees/caregivers and members can be assigned to **Offices** to better drive the scheduling of caregivers to members and to be able to run reports by agency location.

To create a new Office, select the + NEW OFFICE button at the top of the Offices table. To edit an Office, select the menu icon (3 dots) next to the Office and select Edit Office (Figure 97).

THE Hello, Gwyneth! O SETTINGS New Office × Office Name Dashboard OFFICES Offices Set up and manage offices Street Address Line 1 Discussions 9 Authorizations ര Street Address Line 2 (optional) Groups 0 t up and manage groups Appointments STATE NAME ADDRESS ZIP CODE Zip Code 0123 Testin AK 01234 Main Office Ø Visits Documents Edit Office liew and dow Billing Rows per page. 10 . CANCEL SUBMIT Edit Office × Members Rates Manage service codes and rates Main Office Employees **Billing** 0123 Testing Street Settings Q Aanage claims generation options 9 Vendor View vendor details City Testing City Zip Code • 01234 AD DELETE CANCEL SUBMIT

Figure 97. OFFICES sub tab and menu icon (3 dots) with + NEW OFFICE and Edit Office screens

GROUPS

Groups are a way for Provider Agencies to organize their employees/caregivers and the members they serve. By choosing to assign an employee/caregiver or a member to a **Group**, the Agency can more easily run reports for specific populations of caregivers or members. As an example, an Agency may choose to create **Member Groups** based on member characteristics such as "have dogs", "have cats", "prefer male Caregivers" to better inform the caregivers when scheduling appointments.

To create a new **Group**, select the **+ NEW GROUP** button at the top of the **Groups** table. To edit a **Group**, select the **menu icon (3 dots)** next to the Group and select **Edit Group** (Figure 98). There are two types of **Groups** that can be created – **EMPLOYEE** and **MEMBER**.

	SETTINGS				Hello, Gwyneth! O
Dashboard	E Offices Set up and manage offices	MEMBER GROUPS	EMPLOYEE GROUPS		+ NEW GROUP
Authorizations		NAME	# OF MEMBERS		
Appointments	Groups Set up and manage groups	Prefers Male Caregivers	New Group	×	Edit Group
Ø Visits	Documents View and download documents		Group Type: Select	·	Rows per page. 10 + 1 of 1 < 1 >
Billing			Employee	т.,	
S Members	Rates Manage service codes and rates		Group Name Member		
Employees	Billing Munage claims generation options			CANCEL SUBMIT	
	Vendor View vendor details			Edit Group	×
				Group Type: Member	
				Group Name Prefers Male Caregivers	
DOCUMEN	ITS				DELETE CANCEL SUBMIT

Figure 98. GROUPS sub tab and menu icon (3 dots) with + NEW GROUP and Edit Group screens

The **Documents** sub-tab is a list of all exported documents from

other pages in the CareBridge Provider Portal. When a document is exported, it will generate in the background and display in this list when complete. When the user navigates to the **DOCUMENTS** subtab, they can choose to download any document by selecting that document's **download icon** on the far right of the table (Figure 99).

Figure 99. DOCUMENTS sul	o tab and download icons
--------------------------	---------------------------------

THE	SETTINGS				ONG HEALTH KOP	Hello, Gwyneth!
Dashboard Discussions	Offices Set up and manage offices	DOCUMENTS				
Authorizations Appointments	Groups Set up and manage groups	NAME	USFR	DATE/TIME	STATUS	Ø
Visits Billing	Cocuments View and download documente	Billings.pdf	Katie Corder	02/08/2022 2:02 PM	Completed	(±
Members		Vioita.cov Billings.xbs	Katie Corder Amanda Savchuk	02/00/2022 10:51 AM 02/04/2022 1:32 PM	Completed	*
Employees Settings	Rates Manage service codes and rates	Visits.xls	Amanda Savchuk	02/04/2022 1.13 PM	Completed	*

RATES

All standard rates are provided to CareBridge Rates by PASSE and cannot be modified in the system. However, negotiated rates will not be sent from PASSE. If your provider agency negotiated a different rate for specific services, you will need to add that rate yourself by clicking the **+ NEW RATE** button in the top right of the **RATES** sub-tab and filling out the **New Rate** dialog box form (Figure 100).

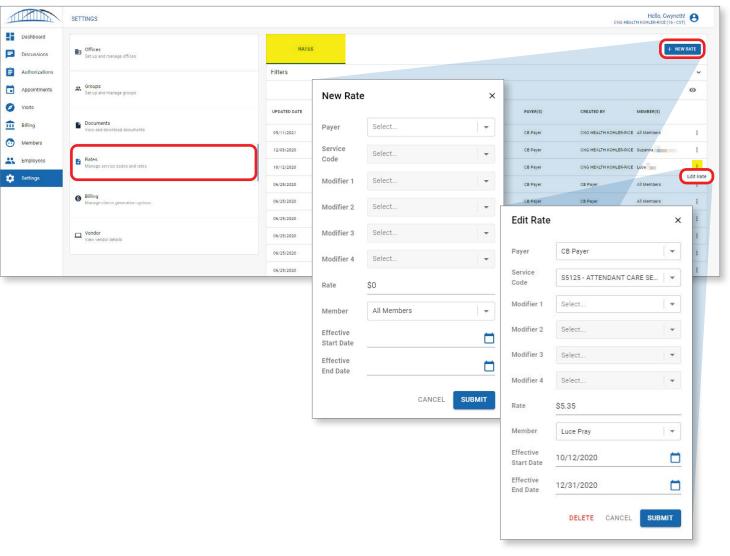


Figure 100. RATES sub tab and menu icon (3 dots) with + NEW RATE and Edit Rate screens

BILLING

CareBridge has built-in features to help create billing efficiencies for providers, reducing the number of rejected or denied claims. It is now possible to select how Provider Agencies will bill. Either through CareBridge EVV for partnered payers or through an external option such as your current 3rd party billing solution. If you click on the Settings page in the left side navigation bar in the Provider Portal, you will see the **BILLING** sub tab. It contains a list of payers available in your state, and each one has its own card.

If a Payer's visits need to be billed differently, and you have the capability, you can change the settings in the **BILLING** sub tab (Figure 101). That changes the default process for that Payer.

	SETTINGS		Hello, Gwyneth! OCNG Mobile Home Health (109 - CST)
Dashboard	B Offices Set up and manage offices	BILLING	
Authorizations	Groups Set up and manage groups	Payer 1 Unavailable option	
Visits	Documents View and download documents	Allow billing through EVV Bill externally	
Billing Members	Rates Manage service codes and rates	Payer 2	
Employees	S Billing Manage claims generation options	Requires billing through EVV starting 01/01/2021 Image: Starting 01/01/2021<	
🔅 Settings	View vendor details	Allow billing externally	
		Payer 3 Available options	
		Allow billing externally	
<		Payer 4	() Support

Figure 101. BILLING sub-tab

Allow billing through EVV: CareBridge will submit your claims directly through the Provider Portal.

Allow billing externally: You will export billing files from the Provider Portal to upload to your current third-party billing solution and continue to bill the same way you do today.

You can set your agency billing preferences in the **BILLING** sub-tab. When you are exporting for billing, it will default to whatever you set as your preference. However, you can also adjust it *per individual member* when you **EXPORT FOR BILLING** (Figure 102).

Sort by Saved Filters Date + Date + Select a saved filter +															
MEMBER	DATE	CHECK IN TIME	CHECK OUT TIME	UPDATED DATE	EMPLOYEE	AUTH #	SERVICE	APPT ID	CLAIM #	PAYER	STATUS	BILLED AMOUNT	PAID AMOUNT	BILLING STATUS	
Elden	09/21/2021	05:46 PM	10:40 AM	09/25/2021	Katie	and the second	\$5125	1000		CB Payer	Completed	\$170.00	\$0.00	Generated, Generated	
	08/17/2021	03:59 PM	04:04 PM	08/31/2021	Andrew	-	\$5130	100.000		CB Payer	Completed	\$0.00	\$0.00	Prebilling Rejection	

Figure	102.	EXPORT	FOR	BILLING	button

This function will automatically default to your Agency's current settings. The CareBridge system won't allow you to choose an option that you don't have, based on your market. If an option is grayed out, it means that your Agency doesn't have that capability (Figure 103).

4 Visits will be exp	ported for claims	and will be a	available for viewin	g on the Billing Page		
MEMBER	DATE	APPT ID	STATUS	PAYER	BILLING ACTION	
Corabella	11/18/2020	2436056	Completed	Payer 3	Bill through EVV	•
Payton	11/16/2020	2436028	Completed	Payer 1	Bill through EVV	
Payton	11/05/2020	2435207	Completed (Manual)	Payer 1	Bill through EVV	
Payton	11/05/2020	2436001	Completed (Manual)	Payer 1	Bill through EVV	-

Figure 103. **EXPORT FOR BILLING** customization options

If an individual visit needs to be billed differently, you can change the settings prior to exporting, by using the **Export** interface that pops up when you **EXPORT FOR BILLING**. This changes the individual visit setting *for that export only*.

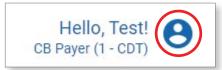
VENDOR

The EVV **VENDOR** sub-tab is a read-only view of the Providers' current EVV vendor. This sub-tab (Figure 104) allows Integrated providers using the CareBridge Portal to see what associated EVV vendors CareBridge has on record.

	SETTINGS					Hello, Gwyneth!
Dashboard	Offices Set up and manage offices	EVV VENDOR				
Discussions		Filters				~
Authorizations	Set up and manage groups					۵
Appointments		VENDOR NAME	PAYER	EFFECTIVE START DATE	EFFECTIVE END DATE	UPDATED DATE
🧭 Visits	Documents View and download documents	CareBridge	CB Payer	02/10/2020		02/10/2022
filling Billing						Rows per page: 5 🛩 1 of 1 (1)
O Members	Rates Manage service codes and rates					
Employees						
Settings	Billing Manage claims generation options					
	Vendor View venicor cetalla					
	(

Figure 104. VENDOR sub-tab

Figure 105. Provider Portal profile icon



For additional resources, you can also access the **CareBridge Resource Library** through your Provider Portal by clicking on the profile icon next to your name at the top right of any screen (Figure 106) or by following this link: http://resources.carebridgehealth.com/evv

ROLE DEFINITIONS

The following is a list of roles that have been referred to within the CareBridge Solution Training Guide. As this list evolves, the Agency will be provided with updates.

Administrator – Provider Agency employee with administrator permissions in the EVV system.

Agency Employee – Provider Agency office staff who will be using the EVV system for some type of operational function (i.e., managing authorizations, scheduling appointments, assigning caregivers to members, billing, etc.)

Caregiver – The employee who works in the member's home providing authorized services.

Employee – Anyone who works for the Provider Agency.

Member – The person the Provider Agency supports who is enrolled in the LTSS program receiving services in their home.

PASSE – The member's health plan. The health plan is contracted with Arkansas Department of Human Services (DHS) for coordination of members' care and benefits.

Payer – The organization (PASSE) that reimburses the Provider Agency for services rendered.

User – Anyone at CareBridge, PASSE, or the Provider Agency who logs into the EVV system, via web portal or mobile app, to review data or do work.