

TRAINING GUIDE CareBridge Provider Portal Electronic Visit Verification (EVV)



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STATE OF IOWA

CONTENTS L O **TABLE**

INTRODUCTION.	4
OVERVIEW	4
WHAT IS ELECTRONIC VISIT VERIFICATION (EVV)?	4
WHAT IS CAREBRIDGE?	4
SOLUTION OVERVIEW AND SETUP	5
OVERVIEW	5
CAREBRIDGE PROVIDER PORTAL	5
Login	
Navigation	5
CAREBRIDGE MOBILE APPLICATION	
Download	
Login	6
EMPLOYEES	
View Employees	
Create New Employee	
Modify Employee Details	
Assign Employees to Offices and/or Groups	
Employees Reports	
MEMBERS View Members	
Create or Modify Member Care Plans	
Edit Appointment Information in Bulk	
Assign Members to Offices and/or Groups	
Member Reports	19
ELECTRONIC VISIT VERIFICATION (EVV) WORKFLOWS	20
OVERVIEW	20
AUTHORIZATIONS	20
View Authorizations	21
Assign Employee to an Authorization	22
Schedule Appointments	22
Authorization Details	
View Appointments	
Appointment Details	
Appointments Reports	30

SIN TENTS Ц О **TABLE**

CHECK-IN & CHECK-OUT	
Schedule Check-In	
Check-III	
Check-Out	
Interactive Voice Response (IVR)	
VISITS	
View Visits	
Visit Details	37
Export Member Care Plan Activities	
Manual Entry	38
Export For Billing	
Visits Page Reports	42
BILLING	43
View Billed Visits	43
Claims History	44
Export for Billing	45
Billing Reports	47
COMMUNICATIONS	
OVERVIEW	
	48
OVERVIEW	48 48
OVERVIEW DISCUSSIONS Discussions Navigation New Discussion	48 48 48 48
OVERVIEW DISCUSSIONS Discussions Navigation	48 48 48 48
OVERVIEW DISCUSSIONS Discussions Navigation New Discussion	
OVERVIEW DISCUSSIONS Discussions Navigation New Discussion Discussion Item Details	
OVERVIEW DISCUSSIONS Discussions Navigation New Discussion Discussion Item Details DASHBOARD & REPORTING	
OVERVIEW DISCUSSIONS Discussions Navigation New Discussion Discussion Item Details DASHBOARD & REPORTING OVERVIEW	
OVERVIEW DISCUSSIONS Discussions Navigation New Discussion Discussion Item Details DASHBOARD & REPORTING OVERVIEW Dashboard	
OVERVIEW DISCUSSIONS Discussions Navigation New Discussion Discussion Item Details DASHBOARD & REPORTING OVERVIEW Dashboard Reports	
OVERVIEW DISCUSSIONS Discussions Navigation New Discussion Discussion Item Details DASHBOARD & REPORTING OVERVIEW Dashboard Reports SETTINGS OVERVIEW Offices	
OVERVIEW DISCUSSIONS Discussions Navigation New Discussion Discussion Item Details DASHBOARD & REPORTING OVERVIEW Dashboard Reports SETTINGS OVERVIEW Offices Groups	
OVERVIEW DISCUSSIONS Discussions Navigation New Discussion Discussion Item Details DASHBOARD & REPORTING OVERVIEW Dashboard Reports SETTINGS OVERVIEW Offices Groups Documents	
OVERVIEW DISCUSSIONS Discussions Navigation New Discussion Discussion Item Details. DASHBOARD & REPORTING OVERVIEW Dashboard Reports SETTINGS OVERVIEW Offices Groups Documents Billing	
OVERVIEW DISCUSSIONS Discussions Navigation New Discussion Discussion Item Details DASHBOARD & REPORTING OVERVIEW Dashboard Reports SETTINGS OVERVIEW Offices Groups Documents	

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>iaevv@carebridgehealth.com</u> or (844) 343-3653. If you have questions, our team is always here to help. Just email: iaevv@carebridgehealth.com or call us at (844) 343-3653.

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.

• Location of the service

• Time the service begins

• Time the service ends

The 21st Century Cures Act requires that EVV systems must collect and verify the following 7 items:

- Type of service performed
- 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

This guide provides an overview of the basic functions of the CareBridge Solution and helps Agency Employees learn how to set-up the CareBridge Solution to enable the delivery and electronic documentation of services performed for members by caregivers.

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 webbased 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://ia.carebridgehealth.com/
- 2. Enter username and password, select LOGIN (Figure 1)

New users can use the **Sign Up!** link to create a **password** and access the Provider Portal. (*Please note:* the admin user will need to create **usernames** for new users. See **Employees** for more information)

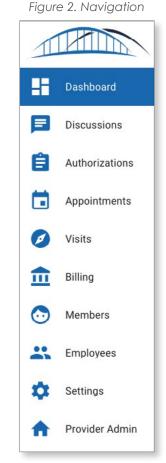
NAVIGATION

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

- **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 (MCOs).
- **Authorizations:** Displays authorizations allowing Agency Employees to acknowledge, assign, and schedule appointments.
- **Appointments:** Displays upcoming scheduled appointments allowing Agency Employees to view 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.
- Provider Admin: Displays Provider information for review

Figure 1. Login screen

PROVIDER	MEMBER
Sig	n In
Jsemame	
Password	
Provider ID	
LOC	



CAREBRIDGE MOBILE APPLICATION

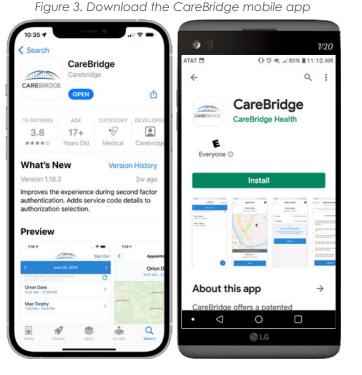
The second component of the CareBridge Solution is the CareBridge Mobile Application. The mobile app is available on iPhone and Android devices and can be used by caregivers to manage their schedule, Check-In, Check-Out, and complete visit documentation.

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 (Figure 3). The user will be prompted for a **Provider ID**, **Username**, and **Password**. Once logged in, the appointment schedule for today is displayed. 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								CNG HEALT	Hello, Jennifer H KOHLER-RICE (16 - CDT - CB)	9
Dashboard	PERSONAL FILTER	PAYROLL (OMPLIANCE SCORE								
Discussions	FILTERS										~
Authorizations	Sort by Employée	Saved File	ers aved filter						ASSIGN TO \sim	+ CREATE EMPLOYEE	0
Visits		USERNAME	EMAIL	PHONE	ROLE	EMPLOYEE TYPE	STATUS	OFFICE(S)	GROUP(S)	LAST LOGIN	
Billing	Greta	10		100	Admin		Active				:
Members	🗍 Joe			-	Admin		Active				:
Employees	Sebastian	-	1.000		Admin		Active				i
Settings	C 61	10.0	1. NOT 101		Admin		Active				:
Provider Admin	🗋 Peytoni 🔳		1000	-	Employee Office		Active				:
	Gwyneth		1		Admin		Active			03/01/2022, 09:53 AM	;
	Gwyneth]	1.00			Admin		Active			06/23/2022, 10:50 AM	:
	Walter			$(1,0,1,\dots,1)$	Admin		Active				:
	🗆 tra 📟	10.1		-	Admin		Active				:
	Britta	100		10.10	Admin		Active				:

Figure 4. Employees page

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 or the **Sort by** drop-down menu at the top left of the table (Figure 5).

PLOYEES						Hello, G CAREBRIDGE TRAINING (2915 - CS	wyneth!
SONAL FILTER PAYROLL COMPLIAN	NCE SCORE						_
TERS		Sort by					
ployee Name, ID, or Username:	Email:	Employee		Phone Number:		Role:	
st/Last name, ID, Username	Q John@e	the second se	ad Q	*****	Q	Select	
ployee Type:	Status:	Employee		Office:		Group:	
léct	Select.	Email		Select	1.	Select	
Billing Check(s):		Phone					
Sect		Role					
RESET FILTERS SAVE FILTERS		Status					
Sort by Saved Filters Employee	er	Last Login				ASSIGN TO - CREATE EMPLO	YEE 6

Figure 5. Employees page **FILTERS** and **Sort by** drop-down menu

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 6)

Figure 6. SAVE FILTERS button

FILTERS			^
Employee Name, ID, or Username: First/Last name, ID, Username	Email: John@email.com Q	Phone Number: ###-###-#### Q	Role:
Employee Type: Back Office x × ·	Status:	Office:	Group: Select
Pre-Billing Check(s):			
SAVE FILTERS			

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

PERSONAL FILTER PAYROLL COMPLIANCE SCORE		
FILTERS		,
Employee Name, ID, or Username: Email:	Phone Number:	Role:
First/Last name, ID, Username Q john@email.co	m Q ###-###-####	Q Admin x X V
Employee Type: Status: Back Office × × Select	Save Filters	×
Pre-Billing Check(s): Select	Enter a name for your filter using the saved filter will only be available in	
C RESET FILTERS	Filter Name	
Sort by Saved Filters	Back Office Admin	
Employee 🔹 🔨 Select a saved filter 💌		CANCEL SAVE
EMPLOYEE USERNAME EMAIL P	HONE	LAST LOGIN

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 (Figure 8).

Figure 8. Saved Filters drop-down menu and results (Back Office Admin)

FILTERS										`
Sort by Employee	Saved Fil Select a	saved filter	-	Sort by Employee	Saved Fil Back Off					o
EMPLOYEE	USERNAME	EMAIL	PHONE		USERNAME	EMAIL	PHONE	ROLE	EMPLOYEE TYPE	L
Sherry Sherry	-	-	-	Gwyneth	and the state	-	and an address	Admin	Back Office	1
Shelby	1000	red in some		Admin	At	ctive				:

Saved filters are specific to the users that create them and the page(s) on which they are created. Users can update/delete their filters as necessary. To update, the user must 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 9).

	Delete Filter ×
FILTERS Sort by Employee Saved Filters Back Office Admin	Are you sure you wish to delete this saved filter? This action cannot be undone and you will have to create a new saved filter if you proceed. Filter Name
Back Office Admin	Back Office Admin
EMPLOYEE USERNAME EMAIL Delete Filter	CANCEL DELETE FILTER

Figure 9. Delete Filter trash can icon and dialog

View Employee Details

To view more details about an employee, select the **menu icon (3 dots)** (Figure 10) on the right side of the employee's row and select **Employee Details**.

Figure 10. Employees page menu icon (3 dots) and Employee Details link

Sort by Employee	Saved Fi Select a	saved filter						ASSIGN TO 🐱	+ CREATE EMPLOYE	• •
EMPLOYEE	USERNAME	EMAIL	PHONE	ROLE	EMPLOYEE TYPE	STATUS	OFFICE(S)	GROUP(S)	LAST LOGIN	
Кау	-	-	-	Admin Office		Active	Main Office, Jane Home Health Trenton			1
Adam Adam	188		an an a	Admin		Active			0	Employee D
	ORT TO FILE							Rows per p		Employee

From the Employee Details screen (Figure 11), users can view employee general demographic info, the employee's **CALENDAR**, and list views of their upcoming **APPOINTMENTS** and completed **VISITS**.

Active		CALENDAR		ALERTS	APP	OINTMENTS	VISI	TS
Adam 💶 💶 🗾 🖊	TODAY	< > 19-:	25 JUNE 2022				Hide Cance	week +
Username		sun 19	^{Mon} 20	^{тие} 21	wed 22	^{Thu} 23	Fri 24	^{Sat} 25
Date of Birth YYYY-MM-DD	1:00 AM							
Email (optional)	2.00 AM 3.00 AM							
First Name Adam	4:00 AM							
Last Name	5-00 AM							
	6:00 AM							

Figure 11. Employee Details screen

CREATE NEW EMPLOYEE

Agency Administrators can create new employees (Agency/Office Employees or caregivers), individually or through bulk import. To create the employees individually, select the **+ CREATE EMPLOYEE** button at the top of the Employees page (Figure 12).

ERSONAL FILTER	PAYROLL	COMPLIANCE SCORE								
ILTERS										
Sort by Employee	Saved Fil	ters saved filter						ASSIGN TO 🐱	+ CREATE EMPLOYEE	0
EMPLOYEE	USERNAME	EMAIL	PHONE	ROLE	EMPLOYEE TYPE	STATUS	OFFICE(\$)	GROUP(S)	LAST LOGIN	
🗌 Кау	land of the second seco	And Speed one	10.00	Admin Office		Active	Main Office, Jane Home Health Trenton			1
Adam	and the		Contract and	Admin		Active				

Figure 12. + CREATE EMPLOYEE button

To create employees in bulk, click the **IMPORT** button at the bottom left of the Employees page, download the Excel template, fill it out, then upload it by clicking the **IMPORT** button again (Figure 13).

Please note: If the information you enter in the spreadsheet template is inaccurate, you will need to update the profiles in the system and **cannot** simply edit and re-import the spreadsheet. Figure 13. Employees page **IMPORT** button and **Bulk Import** dialog box

Import Er	nployees				
In order to bu	lk import Employees, ple	ease download the fol	lowing template and con	nplete the necessar	y field
	PORT_EMPLOYEES.XL	sx			
Once you hav	e completed the templa	te, attach the file belo	w:		
File Name					
🛛 Attach fi					

MODIFY EMPLOYEE DETAILS

To modify Employee Details, select the **pencil icon** next to the employee name (Figure 14). The Employee Details fields will become editable. Select the **SAVE** button at the bottom of the screen to save your changes.

Figure 14. Employee Details screen pencil icon and SAVE button

Active		CALENDAR		ALERTS	API	POINTMENTS	VISITS	
Adam 💻 🗾 🗾	TODAY	< > 19-	25 JUNE 2022				Hide Cancelled	WEEK ¥
Username		Sun	Mon	Tue	Wed	Thu	Fri	Sat
		19	20	21	22	23	24	25
Date of Birth								
YYY-MM-DD	1-00 AM							
Email (optional)	2:00 AM							
CAM	AM							
SAVE								

In addition to general demographic information, the following fields 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.
- Date of Birth: This information is usesd to confirm the user's identity when logging into the app.
- **Email (optional):** If the user would like to receive future communications, such as multi-factor authentication codes, via their email, a valid email address will need to be entered.
- **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 (see 'Check-in & Check-out' section,) an IVR PIN will need to be entered.
- Employee Type (optional): Used to differentiate caregivers from office workers.

CareBridge

- **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 within 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 (Figure 15) 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 Saved Filters ASSIGN TO + CREATE EMPLOYEE 0 ▼ ↑ Select a saved filter. . Employee Office Group EMPLOYEE EMPLOYEE USERNAME EMAIL PHONE ROLE STATUS OFFICE(S) LAST LOGIN TYPE Assign To × Kay Adams kadams lkrs10@gmail.com 667-207-0585 Admin Office ÷ Main Office × -CANCEL SUBMIT

Figure 15. Employees page **ASSIGN TO** button and dialog box

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 16).

Fiaure	16.	Employees	paae	reports
			1 3 -	

- **PAYROLL:** This report returns payroll data for a given time 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, 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 17). 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 17. Employees page **EXPORT TO FILE** options

MEMBERS

The Members page in the CareBridge Provider Portal (Figure 18) allows the designated Agency Employees to view and edit member information. The Members page is populated with data from the member file, (provided by the State or MCO) and updates daily with the most recent information.

	MI	EMBERS								CNG HEALTH KO	Hello, Jennifer HLER-RICE (16 - CDT - CB)	
Dashboard	P	ERSONAL FILTER	ACTIVE MEMBERS	UNASSIGNED MEMBERS	COMPLIANCE SCORE							
Discussions	F	ILTERS										~
Authorizatio		Sort by Member Name		ed Filters lect a saved filter	•					ASSIGN TO 👒	+ ADD MEMBER	0
Ø Visits		MEMBER	MEMBER ID	MEDICAID ID	ADDRESS	PAYER(S)	ACTIVE AUTHS	STATUS	OFFICE(S)	GROUP(S)	LAST VISIT	
Billing		Ginnie ,		10 10 1 M I	(Section 1997) Section 2 Section	CB Payer	No	Active	Main Office, Trenton Office		12/17/2020	:
🕞 Members		Diden 🍽 🕈 🖠	100	100 Mar 100	and a description (2004) 200 Aug	CB Payer	Yes	Active	Main Office, Jane Home Health Trenton		02/02/2022	i
Employees		🗋 Serge 🖷 📺 📰	1.8.	10.00	land and the state and the state of the	CB Payer	No	Inactive	Main Office	have dogs - large	08/20/2020	:
 Provider Adr 		Allin ———————————————————————————————————	-		975-410-1 979-14-1-1	CB Payer	No	Active	Main Office		09/16/2020	:
		Hilde ==	-		na ann an suit Straight an Sta	CB Payer	No	Active	Main Office	have dogs - large		I
		Will agrees	-	-	and thereine a clinic test cost	CB Payer	Yes	Active	Jane Home Health Trenton, Main Office		10/01/2021	:
		Kermit -	-		n an an an an ann. An an an an an an an an an	C8 Payer	No	Inactive	Main Office	82002		:
		🔲 Jennine 💷 🚥	-		e Arabata da Bandara Birta	C8 Payer	No	Inactive	Main Office	82002		I
<	1		PORT TO FILE						Rows per page	10 - 1-10 of 10	o5 < 1 2 3 ⊙ 5	Support

Figure 18. Members page

Users can create members either through bulk upload or individually. create in bulk, click the **IMPORT** button at the bottom left of the Members page, download the Excel template, fill it out, then upload it by clicking the **IMPORT** button again. *Please note:* If the information you enter in the spreadsheet template is inaccurate, you will have to update the Member profiles in the system and cannot simply edit and re-import the spreadsheet.

To create a new member individually, select the **+ ADD MEMBER** option in the top right-hand corner of the Members page. When creating an individual member profile, you will need to have the member's information available before you start. In addition to normal demographic information, the following fields are critical in setting up the new member's profile both individually and in bulk:

- Date of Birth
- Payer(s)
- Eligibility Dates
- Primary Address
- Secondary Address(es)
- Email
- Primary Phone #
- Secondary Phone #(s)
- Status
- Program
- Medicaid ID
- Office/Group

After clicking **+ ADD MEMBER**, you will be directed to the New Member form (Figure 19). Begin filling out the fields, starting with the member's name and date of birth. To add payer information, click on the **+ symbol** next to the field (Figure 18) and input the required information. When you have completed entering the payer information, click on the **+ symbol** at the end of the row (Figure 19). Note that even though the eligibility dates have a separate field, they will be entered here as well. Multiple payers may be entered and modified within this dialog box. Once all the member's payers have been entered, click on the **SAVE** button (Figure 19).

Figure 19. New Member Form	Figure 20. Payers dia	llog box screen
New Member	Payers Payer Member Id Program CB Payer + 123456 Test	Eligibility Dates 08/01/2022 - 08/31/2022 🗃 🛨
Last Name Date of Birth YYYY-MM-DD Payer(s) Payer(s) Doe Rone Eligibility Dates Primary Address Done Secondary Address(es) Tone None	Payers Payer Member Id Progr CB Payer (123456) - Test - 07/01/2022 - 07/31/2022 Multiple Payers may be created and modified.	Start Date - End Date 🗎 +
Email Primary Phone Number None Secondary Phone Number(s) None Status Active Medicaid ID FOB ID Assign FOB Office	Figure 21. Edit Primary Address dialog	Next enter the Member's Primary Address and select the Address Type (Figure 20) If the Member is routinely cared for at multiple addresses, the user will need to enter these addresses. This can be done in the Secondary Address(es) field by clicking on the + symbol (Figure 21).

-

Groups

SAVE

Member's Home

Temporary Residence

Parents

Figure 22. Edit Primary Phone Number box

Primary I	Phone Number	
555-555-	5555	
	12	
Phone # Type	Member's Phone	•
Share	Community	
with	Family Member's Home	
Payer	Member's Phone	
	Parents	
	Temporary Residence	

Figure 23. Add and edit **Secondary** Phone Number(s)

Secondary Phone Number(s) 🛨	
555-555-5555	+
555-555-5555	+

Just like in the address boxes, the user now needs to enter the member's primary and secondary phone number(s) (Figure 22). If the member has a cell phone, it would be the **Primary Phone Number**. If the member has a home phone - or landline - make sure to add it as well. That is the phone that would be used by the caregiver for any **IVR** calls.

Multiple phone numbers can be entered in the **Secondary Phone Number(s)** field. Just click the **+ symbol** (Figure 23).

A member's **Status** is determined by their eligibility dates.

The member's **Medicaid ID** is a required field. This must be entered to identify the Member's benefits. Assigning Members to Offices and/or Groups is a way to organize Members by location, preferences, or any number of other relevant attributes. Please see page 18 for more information.

VIEW MEMBERS

On the Members page, the user will see a tabular view of all members that are currently in the Provider Portal (Figure 14). This table can be filtered and sorted with a few parameters by selecting the **expand arrow** in the **FILTERS** component or the **Sort by** drop-down at the top left of the table (Figure 24).

PERSONAL FILTER ACTIVE MEMBERS UNASSIGNED MEMBERS CO	DMPLIANCE SCORE			
FILTERS				\bigcirc
Member Name or ID: Search By Name or ID Q	Street Address:	Q City:	State:	Zip Code:
Payer: Status: Select Payer • Search or Select	Sort by Member Name 🛛 🗸	Active Auths: Search or Select	Group: Select Group	1.
Office: Pre-Billing Chr. Select	Member Name			
RESET FILTERS SAVE FILTERS	Member ID			
Sort by Saved Filters	Address			
Member Name 🔹 🛧 Select a saved filter, 🛛 🗸	Status			ASSIGN TO 🗸 💽
	Last Visit			

Figure 24. Members page FILTERS and Sort by 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 25).

Figure 25. Members page menu icon (3 dots)

Sort by Member Name		Saved Filters Select a saved filter							ASSIGN TO	0
MEMBER	MEMBER ID	MEDICAID ID	ADDRESS	PAYER(S)	ACTIVE AUTHS	STATUS	OFFICE(S)	GROUP(S)	LAST VISIT	
Donald	(more)	-		CB Payer	Yes	Active			02/17/2022	: Member Deta

From the Member Details screen (Figure 26), you can view general member demographic information, a **CALENDAR** view including all appointments and visits, list views of upcoming **APPOINTMENTS**, completed **VISITS**, the member's **CARE PLAN** data, **Discussions** about the member, and the member's **Authorizations** information.

			CALE	NDAR		APPOINTMENTS		VISITS	CARE PLAN	
Donald	-	TODAY	<	> 20-26 FE	BRUARY 20	22			☑ Hide Cancelle	d WEEK +
Date of Birth			Sun		Ion	Tue	Wed	Thu	Fri	Sat
(10) (10) (10) (10) (10) (10) (10) (10)			20	2	21	22	23	24	25	26
Payer(s)		1.00 AM								
CB Payer										
Eligibility Dates		2:00 AM								
01/01/2019 - 12/31/2025 (CB Payer)		3:00 AM								
		4:00 AM								
Primary Address		5:00 AM								
(CB Payer)										
A REAL PROPERTY AND ADDRESS		6:00 AM								
Secondary Address(es)		7:00 AM								
None		8:00 AM		Guyneth			Gwyneth		Gwyneth	
Email		9:00 AM		Gwyneth 8:00 AM 10:00 AM	i		Gwyneth	-	8:00 AM - 10:00 AM	
		10:00 AM		Service:	\$5125		Service:S5125		Service:S5125	
Deinen Dhann Muselian	Discussions								~	
Primary Phone Number (CB Payer)									O	
									0	
Secondary Phone Number(s)	CREATED BY	ASSIGN	ED TO	TYPE		SUBJECT	CREATED	LAST	T UPDATED	
None	Gwyneth	Authorizati	ons							~
Status										ø
Active										0
Program		START DATE	END DATE	PAYER	AUTH #	UNITS	SERVICE	MODIFIERS ST	ATUS EMPLOYEE	
None		01/01/2021	12/31/2022	CB Payer	100	1000	S5125	Ac	cepted Kay	i :

Figure 26. Member Details screen

DELETE CANCEL

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 27), the Care Plan Activity dialog box will open, and the **Activity** and **Frequency** can be selected along with adding **Comments**, if applicable. These Care Plan activities can be edited at any time by selecting the **menu icon (3 dots)** in the activity row and selecting **Edit Activity**. Additionally, it is possible to view previous versions of the Care Plan by selecting the **As-of** drop-down menu at the top right of the table. 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	APPOINTME	NTS	VISITS	CARE PLAN	
Donald	FILTERS			(As of 02/15/2022 15:58	· · ·
Date of Birth						~
10.000 H			Care Plan	Activity	×	O
Payer(s)	ACTIVITY	FREQUENCY				
CB Payer	N6 - Essential housekeeping	3x per week	Activity	N6 - Essential housekeeping		
Eligibility Dates 01/01/2019 - 12/31/2025 (CB Payer)	Cleaning Medical equipment	3x per week	Frequency	3x per week	· · ·	Edit Activit
Primary Address	N11 - Essential transportation	3x per week				I
(CB Payer)	+ ADD ACTIVITY		Comments			< 1 >

Figure 27. Members Details CARE PLAN screen

MODIFY MEMBER DETAILS

The Member Details screen is populated with data from the member file (provided by the State or MCO) 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. In order to modify these details, select the **pencil icon** next to the name of the member (Figure 28), then select the **+ sign** next to the field you would like to edit in the member's information.

Figure 28. Member Details screen **pencil icon** and **+ sign**

-	1000	CALENDAR	ALERTS	AI	PPOINTMENTS	VISITS	CARE P	LAN
Donald Jacobson 🗹	TODAY	< > 19-	25 JUNE 2022				Ilide Cano	week +
Date of Birth		Sun	Mon	Tue	Wed	Thu	Fri	Sat
2007-04-14	_	19	20	21	22	23	24	25
Payer(s)	1:00 AM							
CB Payer (8B295F4BAD0)	2:00 AM							
Additional Identifiers	3.00 AM							
lone								
ligibility Dates	4:00 AM							
01/01/2019 - 12/31/2025 (CB Payer)	5.00 AM							
Primary Address	6:00 AM							
800 N 16TH ST (CB Payer)	7:00 AM							
COUNCIL BLUFFS, IA 51501	8.00 AM							

CareBridge

Upon selecting the + sign, the user will be presented with a dialog box to input the new/corrected address or phone number (Figure 29). The Address Type drop-down provides a place to record where the member is staying if not at home - ie "Church", "Family Member's Home", or "Temporary Residence". Once **SUBMIT** is selected, the address/phone number will be sent to the Payer (MCO) for approval. Until it is approved, the address/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 section of Member Details.

EDIT APPOINTMENT INFORMATION IN BULK

When in the Member Details screen, 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 at the left end of the appointment rows. Then click on the EDIT APPOINTMENTS button (Figure 30).

Figure 30. Appointment check boxes and EDIT APPOINTMENTS button

		CALENDAR		POINTMENTS		VISITS		CARE PLAN		
Donald	Filters				EDIT APPO	DINTMENTS	CANCEL AI	PPOINTMENTS	~	
Date of Birth									0	
Payer(s)	DATE	START TIME	END TIME	EMPLOYEE	AUTH #	SERVICE	APPT ID	STATUS		
CB Payer	☑ 02/23/202:	08:00 AM	10:00 AM	Gwyneth	inte brai	\$5125	-	Scheduled	:	
Eligibility Dates 01/01/2019 - 12/31/2025 (CB Payer)	02/25/2022	08:00 AM	10:00 AM	Gwyneth	and the second	S5125	No.	Scheduled	:	
Primary Address	02/27/2022	2 08:00 AM	10:00 AM	Gwyneth	And a local	S5125	-	Scheduled	:	
10.000 C C C C C C C C C C C C C C C C C	02/28/2022	12:00 PM	12:15 PM	Kay	and the second	S5125	1000	Scheduled	:	

Next, make the **Start Time** and/ or End Time changes, select the appropriate Employee (caregiver) if necessary, and click SUBMIT (Figure 31). On the next screen, double-check your changes and click GO BACK to make more edits or **CONFIRM** to save your changes.

10:30 am	C Appointment	12:30 pm	Ø	Gwyneth X	•
DATE	START TIME	END TIME	APPT ID	EMPLOYEE	
02/23/2022	08:00 AM	10.00 AM	-	Gayneth	
02/25/2022	08:00 AM	10.00 AM		Gayneth	
02/27/2022	08:00 AM	10:00 AM	100.01	Gwyneth	
02/28/2022	12:00 PM	12:15 PM	100210	Kay	
03/01/2022	12:00 PM	12:15 PM	No.	Kay	
		Rows per	pager 5 ¥	1-5 of 7 < 1 2	

Figure 29. Edit Primary Address screen

Provider Portal Training Guide

Figure 31. Authorizations page FILTERS and Sort by drop-down menu Edit Appointments × The following Appointments will be updated with the new information below DATE START TIME END TIME APPT ID EMPLOYEE 02/23/2022 10:20 AM 12:30 PM 10:30 AM 12:30 PM 12:30 PM 02/27/2022 10:30 AM 12:30 PM 10:00 AM 03/01/2022 10:50 AM 12:30 PM -1.5 of 7 < 1 2

ASSIGN MEMBERS TO OFFICES AND/OR GROUPS

Use the **check boxes** next to member names to select them, then select the **ASSIGN TO** button in the top right of the table to assign members to **Offices** or **Groups** (Figure 32). See the <u>Settings</u> section for more information on the functionality that **Offices** and **Groups** provide.

Figure 32. Members page **ASSIGN TO** button and drop-down menu

1		MEMBERS CNG HE	Hello, Gwyneth! ALTH KOHLER-RICE (16 - CST)	0
H	Dashboard	PERSONAL FILTER ACTIVE MEMBERS UNASSIGNED MEMBERS COMPLIANCE SCORE		
Þ	Discussions	FILTERS		~
Ê	Authorizations	Sort by Saved Filters		~
	Appointments	Member Name Member Name Memb	ASSIGN TO V Office	0
Ø	Visits	Member Member id Medicaid id Address Payer(s) Active Auths Status Office(s) Group(s)	Group	
m	Billing	CB Payer No Active Main Office, Trenton Office	12/17/2020	:
•	Members	Elden CB Payer Yes Active Home Health Trenton	02/02/2022	1
••	Employeee		l	

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 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 33).

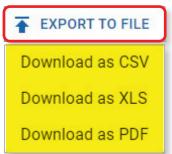
Figure 33. Members page reports

PERSONAL FILTER	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 34). Upon selecting the file type, the document will begin downloading and will be available on the Settings page under the **DOCUMENTS** sub-tab.

Figure 34. Members page **EXPORT TO FILE** button and options



ELECTRONIC VISIT VERIFICATION (EVV) WORKFLOWS

OVERVIEW

The following will help introduce the features 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 35) 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.

		TIONS										CNG HEALTH	KOHLER-RICE (16 - CDT - CB)	9
Dashboard	PERSONAL F	ILTER UNACK	OWLEDGED	UNASSIGNED	D	ECLINED								
Discussions	FILTERS													~
Authorizations	Sort by			Saved Filters										-
Appointments	Update	d Date	· ·	Select a saved	filter	•							REATE AUTHORIZATION	٥
Visits	MEMBER	UPDATED DATE	START DATE	END DATE	UNITS	AUTH #	SERVICE	MODIFIERS	SCHEDULED UTILIZATION %	BILLED UTILIZATION %	PAYER	STATUS	EMPLOYEE	
Billing	Dwigt	04/04/2022	01/01/2021	12/31/2022	1000		\$5125		0	0	C8 Payer	Acknowledged	Gwyneth M 👻	:
Members Employees	Donald	04/04/2022	01/01/2021	12/31/2022	1000	10000	\$5125		7.5	4	C8 Payer	Acknowledged	Kay Adams 🛛 👻	•
Claims	Calvin 🐂 🗄	04/04/2022	01/01/2021	12/31/2022	1000	-25.50	\$5125		0.8	0.8	C8 Payer	Acknowledged	Gwyneth M 🖌 👻	
Settings	Bob 🖷	04/04/2022	01/01/2021	12/31/2022	1000	1000	S5125		0.7	0.7	CB Payer	Acknowledged	Select 👻	•
Provider Admin	Bill 3m iii	04/04/2022	01/01/2021	12/31/2022	1000		85125		0.3	0.3	CB Payer	Acknowledged	Gwyneth M_ 🛛 👻	□ :
	EXPORT	TO FILE										Rows per pag	e:10 ┯ 1-5 of 5 <	1 >

Figure 35. 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 a number of parameters by selecting the **expand arrow** in the **FILTERS** component or the **Sort by** drop-down menu at the top left of the table (Figure 36).

PERSONAL FILTER UNACKNOWLEDGED UNASSIGNED	DECLINED		
FILTERS			(^
Search By Name or Member ID: Search By	Auth#:	Updated Dates:	Start Date:
Name or ID Q Auth #	٩	Start Date - End Date	06/30/2020 - 06/30/2022 🛅
End Date: Payer:	Sort by	Status:	Assigned To:
06/30/2022 - 06/30/2024 🛅 Select Pay	Updated Date	Kelect	Search or Select
Service: Scheduled	Member	Billed Utilization:	Pre-Billing Check(s):
Select Select	Updated Date	Select	Select
Office(s):	Start Date		
Select 👻	End Date		
C RESET FILTERS SAVE FILTERS	Units		
Sort by Saved Filters	Auth #		+ CREATE AUTHORIZATION
Updated Date	Service		
	Scheduled Utilization %		
	Billed Utilization %		

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 of the authorization in the table and will be communicated to the MCO.

1		AUTHORIZ	ATIONS										CNG F	Hello,	Gwyneth! £ (16 - CST)	0	
H	Dashboard	PERSONAL F	FILTER UNACH	NOWLEDGED	UNASSIGN	ED	DECLINED										
=	Discussions	FILTERS														~	
Ê	Authorizations	Sort by			Saved Filter											0	
•	Appointments	Update	d Date		Select a sav	ed filter										0	
Ø	Visits	MEMBER	UPDATED DATE	START DATE	END DATE	UNITS	AUTH #	SERVICE	MODIFIERS	SCHEDULED UTILIZATION %	BILLED UTILIZATION %	PAYER	STATUS	EMPLOYEE			
1	Billing	Dwigt	02/10/2022	01/01/2021	12/31/2022	1000	100.00	\$5125		0	0	CB Payer	V Received	Select	· · .	: :	
	Members	Jay	02/10/2022	03/14/2020	01/26/2021	1219	-	\$5125		0	0	CB Payer	Acknowledge	Select	· C	: :	
3	Employees	Fons	02/10/2022	03/07/2020	11/30/2020	2347	-	\$5125		0	0	CB Payer	V Received	Select	1- 0		

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. Authorizations page **EMPLOYEE** drop-down menu

neth! 8
~
~
o
- = :
 :

SCHEDULE APPOINTMENTS

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). For more information about scheduling appointments, refer to the <u>Appointments</u> section.

Figure 39. Schedule appointments from Authorizations page - calendar icon

wyneth! O	Hello, Gi EALTH KOHLER-RICE (CNG HEAI										TIONS	AUTHORIZA		1
								DECLINED	ED	UNASSIGN	NOWLEDGED	ILTER UNACK	PERSONAL F	Dashboard	H.
~													FILTERS	Discussions	E
									rs.	Saved Filter			Sort by	Authorizations	Ê
0								•	ved filter	Select a sa	-	d Date	Update	Appointments	
	EMPLOYEE	US	AYER STATE	BILLED UTILIZATION %	SCHEDULED UTILIZATION %	MODIFIERS	SERVICE	AUTH #	UNITS	END DATE	START DATE	UPDATED DATE	MEMBER	Visits	Ø
- 🗇	Select,	Acknowledged	B Payer	0 C	0		\$5125	-	1766	02/20/2021	01/29/2020	02/10/2022	Brandyn	Billing	₫
	Кау	Acknowledged	B Payer	0 C	0		\$5125	-	1869	01/30/2021	01/11/2020	02/10/2022	Bentlee	Members	0
															•

AUTHORIZATION DETAILS

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

Ê	Authorizations	Sort by			Saved Filter	5								
	Appointments	Update	ed Date	•	Select a sav	ed filter								Ø
ø	Visits	MEMBER	UPDATED DATE	START DATE	END DATE	UNITS	AUTH #	SERVICE	MODIFIERS		BILLED UTILIZATION %	PAYER	STATUS	EMPLOYEE
	Billing	Donald	02/17/2022	01/01/2021	12/31/2022	1000	1000	\$5125		6	0.9	CB Payer	Acknowledged	Kay Authorization Deta
	Members	Elisha	02/10/2022	03/15/2020	11/07/2020	2170	-	\$5130		0	0	CB Payer	Acknowledged	Kay Adam Member Details

Figure 40. Authorizations page menu icon (3 dots) and Authorizations Details button

From the Authorization Details screen (Figure 41), the user can view start/end dates, service codes, modifiers, units, limits, schedules, utilization percentages, as well as upcoming appointments and completed visits and Alerts associated with the authorization.

ald 🛛 💼	`		
horization		As of 02/16/2022 12:39 PM (current)
s: Acknowledged (Katie			
Authorization Details 🔨			
UNITS C			
SCHEDULED UNITS 75 UNITS OF 1000 UNITS USED		BILLED UNITS 40 UNITS OF 1000 UNITS USED	
75	925		100
SORDUED SAMLARE		BILLER Ø KANLARE	
Payer	Auth Number	Start-End Date	
CB Payer	and the second s	01/01/2021 - 12/31/2022 🛗	
Service Code	Units	Diagnosis Code 1	Diagnosis Code 2
\$\$125	1000	27689	*
Service Provider	Service Provider NPI	Service Provider Medicaid ID	Employee
None	None	None	Kay 👘 👘
Member Eligibility			
01/01/2019 - 12/31/2025			
No Current Note			
Attach File			RESET
Authorizations Segments 🗸			
Appointments/Visits 🗸			
Alerta 🗸			

There are also several actions that can be utilized directly from the Authorization Details screen by clicking the **pencil icon** or the buttons at the bottom:

- 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 Appointments section.
- The **+ MANUAL ENTRY** button takes the user to the Manual Entry dialog. For more information about manual entries, please refer to the Check-In & Check-Out 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	page reports

PERSONAL FILTER	UNACKNOWLEDGED	UNASSIGNED	DECLINED
FILTERS			

- **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 declined authorizations.

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 from the Settings page under the **DOCUMENTS** sub-tab.



APPOINTMENTS

The Appointments page in the CareBridge Provider Portal (Figure 44) allows Agency Employees to view upcoming scheduled appointments as well as identify and act on late or missed visits.

Figure 44. Appointments page

1		APPOINTMENTS								CNG HEALTH	He KOHLER-RICE (1	ello, Jenn 16 - CDT - C	ifer!	9
H	Dashboard	PERSONAL FILTER L	ATE APPOINTMI	ENTS MISSED A	PPOINTMENTS	CANCELLED APPOI	NTMENTS							
F	Discussions	FILTERS												~
Ê	Authorizations	Sort by		d Filters ct a saved filter									0	
	Appointments	Date	T Sele	ct a saved niter	*									
0	Visits	MEMBER DATE		START TIME	END TIME	APPT ID	EMPLOYEE	AUTH #	SERVICE	STATUS	PAYER			
盦	Billing	Elden 06/30	0/2022	12:00 PM	01:00 PM	19 M. C	Gwyneth	LIVE LOT	\$5125	Missed	CB Payer		0	1
\odot	Members	EXPORT TO FILE								Rows per p	age: 10 👻	1 of 1 <	1	>
*	Employees													
	Claims													
\$	Settings													
A	Provider Admin													
	<											(⑦ Supp	port

SCHEDULE APPOINTMENTS IN THE PROVIDER PORTAL

For appointments to appear on the Appointments page they must first be scheduled. To schedule an appointment, the user must 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).

Figure 45. Appointments	page calendar icon
-------------------------	---------------------------

1		AUTHORIZ	ATIONS										CNG H	Hello, Gw EALTH KOHLER-RICE (1	yneth! 😫
H	Dashboard	PERSONAL	FILTER UNAC	KNOWLEDGED	UNASSIGNE	Đ	DECLINED								
	Discussions	FILTERS	5												×
Ê	Authorizations	Sort by			Saved Filter										o
	Appointments	Update	ed Date	•	Select a sav	ed filter	•								U
0	Visits	MEMBER	UPDATED DATE	START DATE	END DATE	UNITS	AUTH #	SERVICE	MODIFIERS	SCHEDULED UTILIZATION %	BILLED UTILIZATION %	PAYER	STATUS	EMPLOYEE	
	Billing	Dwigt	02/24/2022	01/01/2021	12/31/2022	1000	-	\$5125		1.2	0	CB Payer	Acknowledged	Gwyneth	-
	Members	Dwight	02/24/2022	02/07/2020	02/03/2021	1573	the second	\$5130		0	0	CB Payer	Acknowledged	Gwyneth	-
à	Settings	Calvin	02/24/2022	01/01/2021	12/31/2022	1000	-	\$5125		1.4	0.8	CB Payer	Acknowledged	Gwyneth	-

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

Calvin = = Authorization = 01/01/2021 · 12/31			Select For Scheduling	Time Selection Start Time End Time Index Overnight Appointment(s)	<u></u>	Employee Gwyneth	•
UNITS							
SCHEDULED UNITS 8 UNITS OF 1000 UNITS USED	92	BILLED UNITS 8 UNITS OF 1000 UNITS 0	992	Location Start Location	End Location		
CHEDULED @ AVAILABLE	41	BRLIED SAVALABLE	972	$A^{(1)}_{\rm cons} = A^{(1)}_{\rm cons} A^{(2)}_{\rm cons} A^$	(•) (10 P ⁺⁺ a) =	0.15 × 0.17	1 *
Payer CB Payer	Auth Number		Start-End Date 01/01/2021 - 12/31/2022	Individual Date Selection		Dates Selected	1
Service Code 85125	Units 1000		Diagnosis Gode 1	Select Dates	(
Diagnosis Code 2				Repeat Schedule Start Date Repeat Every	CLEA Select		
ervice Provider Ione	Service Provider N None	PI	Service Provider Medicaid ID None	Repeat On Select	•		
Employee Swyneth	Member Eligibility 01/01/2019 - 12/3			End O After Visits O By		0-0 of 0	< >
No Current Note				Add Note			
				8 Attach File			CLEAR
				2011	EDULE APPOINTMENTS		

Figure 46. Schedule Appointment screen

On the right side of the screen 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 Collection card to select individual dates for appointments. The user can individually select as many dates as necessary from the Individual Date Collection card. Once the dates are selected, they will display in the Dates Selected card (Figure 47).
- 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. Example: 'Repeat on Wednesdays.'
 - **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 above, the Dates Selected card will populate with the appropriate dates based on the 'Individual Date Selection' or 'Repeat Schedule' fields.

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 the selected dates (Figure 47).

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

▲ Authorization = :		-	Time Selection		Employee	
01/01/2021 - 12/31/2022	10.2	Select For Scheduling 🤡	Start Time C End Time	O	Gwyneth	
NITS			Overnight Appointment(s)			
SCHEDULED UNITS 8 UNITS OF 1000 UNITS USED	BILLED UNITS	S DOG UNITS USED	Location			
992		992	Start Location	End Location		
DI-HOULED & AVALABLE	OBLID ON	ALGES	- Constitution (Constitution)	All Contractions	orour r	
ayer	Auth Number	Start-End Date				
B Payer	- 1.0 × 17100	01/01/2021 - 12/31/2022	Individual Date Selection		Dates Selected	
ervice Code	Units	Diagnosis Code 1	Select Dates			
5125	1000	7.45				
iagnosis Code 2			Repeat Schedule	CLEA	R	
*						
ervice Provider	Service Provider NPI	Service Provider Medicaid ID	Start Date Repeat Every Select	1. J. T.		
one	None	None	Repeat On Select	*		
mployee	Member Eligibility		End After Visits By	•		
wyneth _:### #-	01/01/2019 - 12/31/2025				0-0 of 0 <	2
No Current Note			Add Note			
			🕅 Attach File			CLEAS

Figure 47. Recurring appointments dates selection

VIEW APPOINTMENTS

On the Appointments page, the user can see a tabular view of all appointments that are currently scheduled. This table can be filtered and sorted with several parameters by selecting the **expand arrow** or the word **FILTERS** or the **Sort by** drop-down menu at the top left of the table (Figure 48).

			Sort by					0
FILTERS			Date	-				\bigcirc
Search By Member: Search by Name or ID	Q	Search By Appt ID: Appt ID	Member	*	Search By Auth #: Auth #	Q	Search By Employee: Search By Name or ID	Q
Date Range: 02/24/2022 - 05/24/2022 Pre-Billing Check(s): Select RESET FILTERS SAVE FILTERS		Payer: Select Payer Office(s): Select	Date Start Time End Time Appt ID Employee		Status: Early and in Progress X in Progress X Late X Late and in Progress X Missed X Missed and in Progress X Scheduled X Aggregation Status: Select	•	Service: Select	
Sort by Saved Filte	ers aved filter	-	Auth # Service					0
			Modifiers	- 1				
			Status					

Figure 48. Appointments page **FILTERS** and **Sort by** drop-down menu

APPOINTMENT DETAILS

To view more details about an appointment, select the **menu icon (3 dots)** on the right side of the appointment row and then select **Appointment Details** (Figure 49).

Figure 49. Appointments page menu icon (3 dots) and Appointment Details link

MEMBER	DATE	START TIME	END TIME	APPT ID	EMPLOYEE	AUTH #	SERVICE	STATUS	PAYER	
Bill	02/24/2022	05:00 AM	06:00 AM	559321	Gwyneth	-	\$5125	Missed	CB Payer	
Dwigt	02/24/2022	09:00 AM	10:00 AM	559326	Gwyneth		\$5125	Missed	CB Payer	Appointment Details Authorization Details
Bill	02/26/2022	05:00 AM	06:00 AM	559322	Gwyneth	-	\$5125	Scheduled	CB Payer	Member Details

From the default Appointment Details page (Figure 50), 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. Other cards will be made available as necessary. A user may move between all the member's upcoming **APPOINTMENTS** and completed **VISITS** by selecting them from the lists on the left side of the screen. On the right, the user may look at all **ALERTS** associated with the selected appointment, the **CLAIMS HISTORY**, The member's **CARE PLAN** and **OBSERVED CHANGES** data, a **CALENDAR** view of all the member's appointments and visits (see > right arrow), and the member's **SCHEDULE HISTORY** by selecting from any of those options listed on the tabs on the right of the screen.

	APPOINTMENTS > DETAIL >				Hello, CNG HEALTH KOHLER-RIG	Gwyneth! O
Dashboard	BILL Primary Phone: Primary Av	ddress.				
Discussions	APPOINTMENTS VISITS	DETAILS	ALERTS CLAIMS	HISTORY C	ARE PLAN	OBSERVED CHANGES
Authorizations	01/24/2022 - 03/24/2022 🚞					
Appointments	Show All	Appointment		Missed Visit 🥜		
Visits	02/28/2022 1 hrs Gwyneth 55125 02/26/2022 1 hrs Gwyneth 55125	Appointment ID: Status: Authorization:	Missed	Missed Visit Reason: Missed Action Taken: Manual Notes:	No reason submitted. No action submitted. No notes submitted.	
• Members	02/24/2022 1 hrs Gwyneth S5125	Employee:	Gwyneth -			
Employees		Start Date/Time: End Date/Time:	Feb 24, 2022 5:00 AM Feb 24, 2022 6:00 AM			
Provider Admin		Start Location:	1000 000 1000 000			
		Expected Duration: Payer	1 hours 0 minutes (4 units) CB Payer			
		Billing				
		Service Code:	S5125			
	+ SCHEDULE APPOINTMENT	Billing Status:	None None None			
uploade	wing file types can be d: .doc, .docx,.pdf, .jpg, .json, .png, .jpeg, and .tx				CANE	CEL SAVE
		EXPORT FOR BILLIN	MANJAL ENTRY	RESCHEDULE	CANCEL A	APPOINTMENT

Figure 50. Appointment Details screen

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

- **EXPORT FOR BILLING:** If the visit has been completed properly, it can be exported.
- **MANUAL ENTRY:** For non-EVV visits, complete a Manual Entry. (See the Visits section for more information about Manual Entries.)
- **RESCHEDULE:** For the appointment selected, choose a new date, or modify any of the appointment details by selecting the **RESCHEDULE** button.
- **CANCEL APPOINTMENT:** For upcoming appointments, choose to cancel and provide a reason.

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 51).

Figure 51. Appointments page reports

PERSONAL FILTER	LATE APPOINTMENTS	MISSED APPOINTMENTS	CANCELLED APPOINTMENTS
FILTERS			

- LATE APPOINTMENTS: This report returns a list of all appointments that are late. An appointment is considered late when a Check-In has not occurred within one hour of the appointment start time.
- **MISSED APPOINTMENTS:** This report returns a list of all appointments that have been missed. An appointment is considered missed when a Check-In has not occurred within three hours of the appointment start time.
- **CANCELLED APPOINTMENTS:** This report returns a list of all appointments that have been cancelled.

To export any of the data on the Appointments page to a **PDF**, **XLS**, or **CSV** file, select the **EXPORT TO FILE** button at the bottom of the page (Figure 52). Upon selecting the file type, the document will begin downloading and will be available from the Settings page under the **DOCUMENTS** sub-tab.

Figure 52. Appointments page **EXPORT TO FILE** button and options



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 EVV 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 a schedule view (Figure 53). The schedule will allow the user to view any appointments that are scheduled for that day. If the **<> arrow icons** on either side of the date are selected, they can view past visits or tomorrow's schedule.

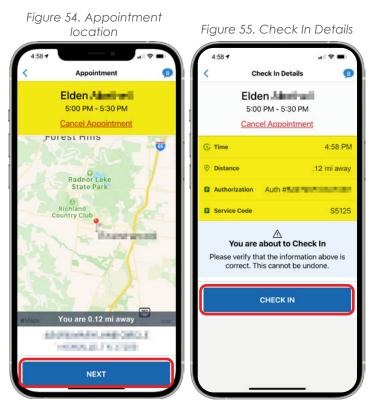
CHECK-IN

To Check-In for a scheduled appointment, select the **name of the member**. 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 is displayed (Figure 54).

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-In to the appointment by selecting the **CHECK IN** button (Figure 55) and then view the confirmation screen that shows Check-In was completed (Figure 56).

Please note: when different services are scheduled in consecutive order, the Caregiver must Check-Out of the first service and then 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.





Before continuing the documentation process in the app, the caregiver should proceed with their visit tasks. Once they are finished with their duties, they may move on to the Observed Changes survey in the app.

OBSERVED CHANGES

Once Check-In is completed, the caregiver is presented with important questions allowing them to indicate whether the member has had any Observed Changes (Figure 57). The Caregiver should keep these questions in mind while performing their tasks during the visit. Once they are finished with their duties, they may begin filling out the Observed Changes survey in the mobile app.

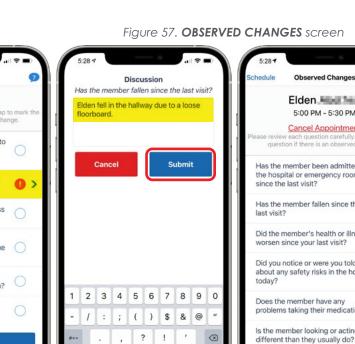
All the questions are "yes/no" questions and to answer a question "yes," select the **radio button** (\bigcirc) next to the question. If the answer is "no," leave the radio button empty. If there is an Observed Change, it will trigger a **Discussion** (Figure 57) that is sent to both Payer (MCO) and Provider. This **Discussion** can be accessed on the Provider Portal Discussions page. Once all questions are answered, the caregiver can may select the **CONTINUE** button. If there are no changes, the caregiver may select NO OBSERVED CHANGES (Figure 57) and then Confirm.

5:28 4	· ₹ -) 9	ſ	5:28 🕫		D	iscu	issio	9	.	। २ ।		5:28 - Schedule		≎ ■) 8	5:28 4 Schedule	Observed Changes	() () () () () () () () () () () () () (
Elden Black Please review each question carefully. Tap t question if there is an observed char		E	las the Iden Ioorbe	fell in	h the						t?	Please re	Elden - 5:30 PM 5:00 PM - 5:30 PM Cancel Appointment view each question carefully. Tap	to mark the	Please rev	Elden 5:00 PM - 5:30 PM Cancel Appointment	o mark the
Has the member been admitted to the hospital or emergency room since the last visit? Has the member fallen since the last visit?		I	c	Cance	el			S	ubmi	it		Has the ho	her control of there is an observed characteristic of the there is an observed characteristic of the member been admitted to be provided or emergency room the last visit?	ange.	Has th	e member been admitted to spital or emergency room he last visit?	
Did the member's health or illness worsen since your last visit?	0											Has the last vi	ne member fallen since the sit?	0	Has ti last vi	By selecting 'Confirm' below, you are acknowledging that you did not observe any	0
Did you notice or were you told about any safety risks in the home today?	0	l					Did the member's health or illn worsen since your last visit?	n since your last visit?	0	Did th during worse Cancel		0					
Does the member have any problems taking their medication?						_	_	_	_	_	_		ou notice or were you told any safety risks in the home ?	0		any safety risks in the home	0
Is the member looking or acting different than they usually do?	0	1	2	3	4	5	6	7	8	9	0		the member have any ems taking their medication?	0		he member have any ms taking their medication?	0
CONTINUE		#+=		•	,	1	?	!	'				member looking or acting ent than they usually do?	0		member looking or acting nt than they usually do?	0
			ABC			spa	ace			retu	rn Q		NO OBSERVED CHANGES	5		NO OBSERVED CHANGES	



Check In Completed!

CONTINUE

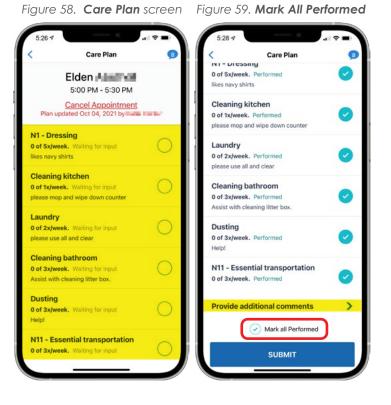


CARE PLAN

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 (Figure 58).

If all the **Care Plan** activities have been performed and there are no issues, the caregiver can click **Mark All Performed** at the bottom of the screen (Figure 59).

Please note: The caregiver will also see a **Provide Additional Comments** link at the bottom of the **Care Plan** screen (Figure 59). 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 60).



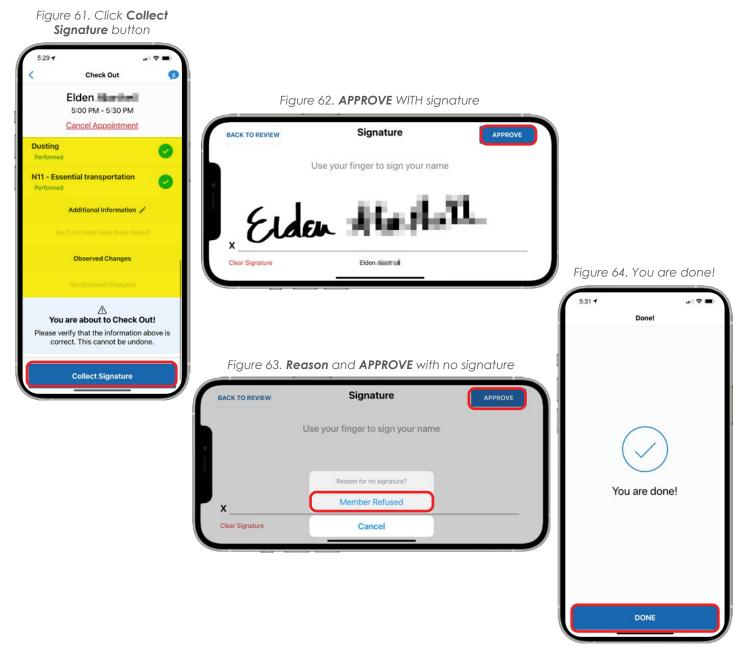
The Caregiver can also select each **Care Plan** activity individually, and indicate whether the activity was **Performed**, **Skipped**, or the **Client** (Member) **Refused** (Figure 60). Once the caregiver has marked their completed activities, reviewed the information, and clicked on **SUBMIT**, they may begin Check-Out (Figure 60).

Figure 60. Reason and APPROVE with no signature

Additional Information	< Care Plan	9	< Care Plan	6	< c	Check Out
lescription of the services I performed for he consumer	Elden 5:00 PM - 5:30 PM		Plan updated Oct 05, 2021 by Mines	Elden Abethell 5:00 PM - 5:30 PM		
escribe the consumer's response to the ervices provided	Cancel Appointment Plan updated Oct 06, 2021 by		likes navy shirts	-	Cance	I Appointment
	N1 - Dressing	-	Cleaning kitchen 0 of 1x/week, Performed		Check In	4:58 F
Cancel Submit	0 of 5x/week. Performed likes navy shirts		please mop and wipe down counter	•	🕓 Time	5:29
	Cleaning kitchen		Laundry 0 of 2x/week. Performed	0	 Distance 	You are .12 mi av
	0 of 1x/week. Skipped please mop and wipe down counter	\mathbf{x}	please use all and clear	•	Authorization	Auth #5227985312230
	Laundry		Cleaning Stove/Refrigerator 0 of 6x/week. Skipped		Service Code	S5'
	0 of 2x/week. Client Refused please use all and clear	0	a of officers, output	_	c	ARE PLAN
	Select the status this activity:		S13 - Recording and reporting of changes in vital signs to the nurs		N1 - Dressing	
	Performed		or therapist 0 of 1x/week. Client Refused	•	Performed	
					Cleaning kitchen	•
	Skipped		Provide additional comments	>		
	Client Refused		Mark all Performed		Laundry Performed	
j i	Cancel		SUBMIT		Cleaning bathroo	om

CHECK-OUT

Once the Care Plan documentation is complete, the Caregiver is presented with Check-Out details and can review to confirm that all previous documentation is correct (Figure 61). The caregiver should then select the **Collect Signature** button to continue. At this point, the member has an opportunity to attest to the visit by providing their signature in the mobile app (Figure 62). Once a signature is added, the caregiver can select **APPROVE** to complete the Check-Out workflow and the visit. If **APPROVE** is selected without the member entering a signature, the app will ask for a reason. For example, the member was sleeping, or physically unable to sign (Figure 63). Once the caregiver has completed the Check-Out process, they are done with the visit. (Figure 64).



INTERACTIVE VOICE RESPONSE (IVR)

There will be instances when the caregiver cannot utilize the CareBridge Mobile Application. In these instances, they can choose to use the **Interactive Voice Response (IVR)** system. To Check-In and Check-Out, the caregiver will need to call the **IVR** phone number **(515) 489-4787** from the member's approved phone number. Additionally, the caregiver will need to input a **Provider Code**, and an **IVR ID** 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 caregiver will also be asked to input a six-digit **Sign In Code** that will be sent to them via text message or email during the **IVR** registration process. If they have no way to receive this code, they will need to call their MCO to get it.

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 65) allows Agency Employees to view completed visits and Pre-Claim Checks, and to request claims.

Figure	65.	Visits	page
1.90.0			0.90

	VISITS							Hello, Gwyneth CNG HEALTH KOHLER-RICE (16 - CST	
Dashboard	PERSONAL FILTER LAT	E VISITS MISSED VISITS N	IANUAL VISITS	EVV VISITS IVR V	ISITS FOB	VISITS			
Discussions	FILTERS								
Authorizations	Sort by Date	Saved Filters						EXPORT FOR BILLING + MANUAL ENTRY	0
Appointments	2019		10						
Visits	MEMBER	DATE CHECK IN CHECK TIME OUT TIME	EMPLOYEE	AUTH #	SERVICE	PAYER	APPT ID	STATUS	
Billing	Elden	01/11/2022 10:12 AM 10:12 AM	Amanda	-	\$5125	CB Payer	-	Completed	
Members	Donald	02/10/2022 04:00 PM 04:30 PM	Kay		\$8125	CB Payer	10100	Missed and Completed (Manual)	
Employees	Donald Donald	02/11/2022 04:38 PM 05:00 PM	Amanda 💷 🔲		\$5125	CB Payer	100	Completed	
Settings	Donald	02/12/2022 04:00 PM 04:30 PM	Kay	-	\$5125	CB Payer	19881	Missed and Completed (Manual)	
Provider Admin	Donald	02/13/2022 04:00 PM 04:30 PM	Kayha	10.000	85125	CB Payer	Territori,	Missed and Completed (Manual)	0
	Donald	02/14/2022 04:00 PM 04:30 PM	Kay	18.8 815	85125	CB Payer	(Beak)	Missed and Completed (Manual)	
	Donald	02/15/2022 08:10 AM 08:10 AM	Amanda 📰		\$5125	CB Payer	1000	Completed	
	Donald	02/15/2022 04:00 PM 04:30 PM	Kay	1000	\$5125	CB Payer	22.0	Missed and Completed (Manual)	0
	Donald	02/17/2022 07:00 AM 10:00 AM	Owymeth	10000	\$5125	CB Payer	- All of	Missed and Completed (Manual)	0
	Donald	02/23/2022 08:00 AM 10:00 AM	Gwyneth 🔳 🔳		\$5125	CB Payer	10.00	Late and Completed (Manual)	0
	T EXPORT TO FILE							Rows per page: 10 - 1-10 of 12 < 1	2

VIEW VISITS

The Visits page displays a tabular view of all visits that have been completed. This table can be filtered and sorted with several parameters by selecting the **expand arrow** in the **FILTERS** component, or the **Sort by** drop-down at the top left of the table (Figure 66).

PERSONAL FILTER LATE VISITS MISSED VISITS MANU	AL VISITS EVV VISITS IVR VISITS	FOB VISITS	
FILTERS		-	<u>^</u>
Search By Member Name or ID: Search B Search By Name or ID Q Appt ID	Ap Sort by Date	Search By Auth #. Auth #	Search by Employee: Search By Name or ID Q
Date Range: Payer. 11/25/2021 - 02/25/2022	Date	Status: Completed X Completed (Manual) X Early and Completed X Early and Completed (Manual) X Late and Completed X Missed and Completed X	Service: Select
Pre-Billing Check(s) Select.	Auth # Service	Missed and Completed (Manual) × Office(s): Select	Aggregation Status:
RESET FILTERS Sort by Date Solution Solutio	Check In Time Check Out Time Appt ID		F EXPORT FOR BILLING + MANUAL ENTRY
	Status		

Figure 66. Visits page **FILTERS** and **Sort by** menu options

VISIT DETAILS

In order to view more details about a visit, select the **menu icon (3 dots)** on the right side of the visit row and then select **Visit Details** (Figure 67).

MEMBER	DATE	CHECK IN TIME	CHECK OUT TIME	EMPLOYEE	AUTH #	SERVICE	PAYER	APPT ID	STATUS	
Elden	01/11/2022	10:12 AM	10:12 AM	Amanda Savchuk		\$5125	CB Payer	1017	Completed	1
Donald man	02/10/2022	04:00 PM	04:30 PM	Kay Adams	100000	\$5125	CB Payer	1848	Missed and Completed (
Donald	02/11/2022	04:38 PM	05:00 PM	Amanda Savchuk	1000	S5125	CB Payer		Completed	Visit Details Authorization Detai
Donald	02/12/2022	04:00 PM	04:30 PM	Kay Adams		\$5125	CB Payer	100	Missed and Completec	Member Details

Figure 67. Visits page **menu icon (3 dots)** and **Visit Details** link

From the Visits Details screen (Figure 68), the user can view associated data in the EVV Visit and Billing cards as well as add Notes and attachments to the visits. They can also move between all upcoming **APPOINTMENTS** and completed **VISITS** for a member by selecting them from the lists on the left. The user can see any appointment **ALERTS**, the member's **CLAIMS HISTORY**, **CARE PLAN** and **OBSERVED CHANGES** data, a **CALENDAR** style view of their appointments and visits (**right arrow** >), and the member's **SCHEDULE HISTORY** by selecting any of those options from the tabs on the right.

Figure 68. Visit Details screen

Discussions	APPOINTMENTS	VISITS	DETAILS	ALERTS	CLAIMS HISTORY	CARE PLAN	OBSERVED CHANGES
Authorizations	01/10/2022 -	03/10/2022					CRANUES
Appointments	Sho	w All	Visit			Manual Entry	
Visits Billing Members Employees Settings Provider Admin	02/15/2022 Gwyneth 02/14/2022 Kay 02/13/2022 Kay 02/12/2022 Kay 02/11/2022 Amanda 02/11/2022 Amanda 02/11/2022 Amanda	1 hrs (4 units) 5125 30 min (2 units) 5125 30 min (2 units) 5125 30 min (2 units) 5125 22 min (1 units) 5125 19 min (1 units) 5125 19 min (2 units) 5125 10 min (2 units) 10 min	Appointment (D) Status Authorization Omployee: Start Date/Time: End Date/Time: Start Location End Location End Location Pager	Mased and Completed (Mare Ray Rep 10, 2022 400 PM Reb 10, 2022 400 PM Reb 10, 2022 430 PM Double 30 minutes (2 units) Ob Payer		Created Date: Check in Data/Time: Check Out Date/Time: Visit Duration: Check Out Data/Time: Check Out Data/Time: Acceptable Locations: Manual Resear Oode: Manual Resear Oode: Manual Resear Oode: Manual Resear Oode: Manual Resear Oode: Manual Resear Oode:	Peb 15, 2022 9:36 AM Peb 10, 2022 4:00 PM Peb 10, 2022 4:30 PM 0 hours 30 minutes (2 with) N/A Forgot to clock invout
	02/10/2022 Ananada 02/10/2022 Kay 02/01/2022 Kay + SCHEDULE APPOINTMENT	39 min (3 uurts) 55125 1 hrs (4 units) 55125 15 min (1 uurts) 55125	Billing	ore-billing checks have been re	NEW RESOLVED ALERTS	Missed Vitit Reason Missed Action Taken Manual Notes:	Canginer forget to check in / out Benvice provided as scheduled No notes submitted.
			Service Code: Modifiers: Billing Status: Units:	05125 None None			
			Add Note				CANCEL SAVE

CareBridge

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

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

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 69). This file can be retrieved in the Settings section, under the **DOCUMENTS** sub-tab. View the Check-In & Check-Out section for more information on how the Care Plan is presented to caregivers for completion as part of a visit.

1	HIDE	VISITS > DETAIL							Hello, Gwynethi CNG HEALTH KOHLER-RICE (16 - CST)		
H	Dashboard	DONALD Member ID: 1	Primary Phone: Primary Address:								
	Discussions	AJ	PPOINTMENTS VISITS		DETAILS	ALERTS	CLAIMS HISTORY	CARE PLAN	OBSERVED CHANGES		()
Ê	Authorizations		01/15/2022 - 03/15/2022		FILTERS					EXPORT	~
	Appointments		Show All		FILTERS					• EXPORT	Ň
Ø	Visits	02/15/2022 Gwyneth	1 hrs (4 units) \$5125	*							0
	Billing	02/13/2022 Kay	30 min (2 units) \$5125		ACTIVITY	FREQUENCY	COMM	ENT	RESPONSE		
)	Members	02/12/2022 Kay	30 min (2 units) \$5125		N6 - Essential housekeeping	3x per week			Completed		
	Employees	02/11/2022 Amanda	22 min (1 units)		Cleaning Medical equipment	3x per week	Ör as n	eeded.	Completed		
	Entproyecto	02/11/2022	19 min (1 units)						Rows per page: 5 +	1.2 of 2 < 1	>

Figure 69. 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 Agency Employee may complete a **Manual Entry**.

For a visit that does not have an EVV Check-In and Check-Out, the user must 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 70).

Figure 70. + MANUAL ENTRY button and Manual Visit Entry link

	VISITS	
Dashboard	PERSONAL FILTER LATE VISITS MISSED VISITS MANUAL VISITS EVV VISITS IVR VISITS FOR VISITS	
Discussions	FILTERS	×
Authorizations	Sort by Saved Filters Date V The Saved filter.	
Visits	MEMBER DATE CHECK IN CHECK EMPLOYEE AUTH # SERVICE PAI	VER APPT ID STATUS FOR Visit Entry

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 71).

Figure 71. Manual Entry screen

	<u> </u>	
Manual Entry		x
Member	Authorization	Appointment (optional)
Donald	(Active)	▼ Unassigned ▼
Employee	Status	Billing Status
Gwyneth	Completed (Manual)	Pending
Service Code	Modifiers	Location
\$5125		
Check-In Date/Time	Check-Out Date/Time	Visit Duration
02/10/2022 01:00 PM	02/10/2022 02:00 PM	1 hours 0 minutes (4 units)
Check In Location	Check Out Location	Acceptable Locations
None	None	Ν/Λ
Payer	Notes	
CB Payer		
Manual Reason Code	Enter a note	
Select Reason Code	<u>*</u>	
Caregiver error	*	
No access to application or IVR	0 Attach File	
Technical error	The following file types can be	uplagdad: dag. dagy
Forgot to clock in/out	The following file types can be u .pdf, .jpg, .csvxlsxlsx, .json, .j	CANCEL SUDAIT
Duplicates/overlapping		

In cases in which a visit does have an EVV Check-In 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 72).

Sort by Date	Saved Filters Select a saved	i filter 👻			C	EXPORT FOR BILLING + MANUAL ENTRY	0
MEMBER	DATE CHECK TIME	IN CHECK EMPLOYEE	AUTH # SERVI		APPT ID	STATUS	
Elden	01/11/2022 10:12 A	M 10:12 AM Amanda	\$5125	CB Payer		Completed	•
Donald	02/01/2022 09:30 A	M 09:45 AM Kay	\$5125	CB Payer		Completed (Manual)	1
Bill	02/03/2022 03:30 P	M 03:45 PM Kay	\$5125	CB Payer		Completed (Manual)	i

Figure 72. EXPORT FOR BILLING button

The user will be presented with a dialog box indicating the Payer and default billing action for each visit. (Figure 73). Figure 73. **Export** dialog box

2 Visits will b	be exported for billin	g and will be a	vailable for viewing	on the Billing Page		
MEMBER	DATE	APPT ID	STATUS	PAYER	BILLING ACTION	
Donald	02/01/2022	2	Completed (Manual)	CB Payer	Bill through EVV	*
Bill	02/03/2022	2	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 more detail (Figure 74).



1		VISITS												Hello, Gwyneth CNG HEALTH KOHLER RICE (16 - CST)	.0
==	Dashboard	PERSONAL FILTER	E VISITS	MISSED VIS	its i	MANUAL VISITS	EVV VISITS	IVR VISITS							
E	Discussions	FILTERS													~
	Authorizations Appointments	Sort by Date •	•										The exposition of the expositi	TFOR BILLING + MANUAL ENTRY	ø
ø	Visits	MEMBER		START	END TIME	EMPLOYEE	AUTH #	SERVICE		HECK IN ME	CHECK OUT TIME	PAYER	APPTID	STATUS	_
	Billing	Itch Coomes	12/08/2020	11:00 am	01:00 pm	Britney Fraser	379231551196426	\$5130	11	MA 00:	01:00 PM	CB Payer	557346	Missed reason is missing on the appointment.	•
\odot	Members	Artemis Sellick	12/09/2020	02:00 pm	04:00 pm	Kristen Myers	234101926907897	85125	03	02 PM	03:08 PM	CB Payer	557365	Late and Completed	:

Additionally, Pre-Billing Checks can be viewed on each page by filtering using the **Pre-Billing Check(s)** filter (Figure 75).



FILTERS			^
Search By Member Name or ID:	Search By Appt ID:	Search By Auth #:	Search by Employee:
Search By Name or ID Q	Appt ID	Auth # Q	Search By Name or ID Q
Date Range:	Payer:	Status:	Service:
11/25/2021 - 02/25/2022	Select Payer	Select	Select.
Pre-Billing Check(s):	Check In/Out Type:	Office(s):	Aggregation Status:

The following (Figure 76) is a full list of Pre-Billing Checks performed in the CareBridge Solution and potential opportunities to resolve the Pre-Billing Check to submit the visit for billing.

Figure 76. Pre-Billing Checks and Resolutions table

PRE-BILLING CHECK	RESOLVER	RESOLUTION
No authorizations available during the appointment	PROVIDER	MCO issues a new authorization or clarifies
Member is ineligible during the appointment	мсо	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	мсо	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 the appointment	мсо	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 with units via manual entry
Appointment service code has no rate or unit definition	PROVIDER	Provider completes a manual entry
Appointment has a terminated authorization	мсо	MCO updates the authorization or clarifies
Appointment exceeds the authorization/ segments max units	PROVIDER	Provider completes a manual entry that reduces units to allow billing, or requests additional units from the MCO
Caregiver has no birth date set	PROVIDER	Provider updates caregiver birth date
Appointment has no attestation	MEMBER	Member to attest through member portal

Appointment has caregiver without license number	PROVIDER	Provider adds a caregiver license ID in employee details
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	Provider updates the visit in appointment visit details to include a service modifier

VISITS PAGE REPORTS

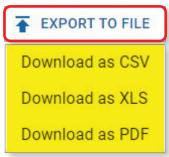
By default, the **PERSONAL FILTER** is selected upon navigating to the Visits page. It can be used to filter and sort the visits table in a variety of ways to return the subset of visits that is most useful. In addition to the **PERSONAL FILTER**, there are six reports that have predefined filters to help quickly navigate to useful visits (Figure 77). Figure 77. Visits page reports

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

- 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 hasn't occurred within 1 hour of the appointment.
- **MISSED VISITS:** This report returns a list of all missed visits. A visit is considered missed when a Check-In hasn't occurred within 3 hours of the appointment.
- 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.
- FOB VISITS: This report returns a list of all completed visits that weremade using a FOB.

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

Figure 78. Visits page **EXPORT TO FILE** button and menu options



BILLING

The Billing page in the CareBridge Provider Portal (Figure 79) allows agency employees to view completed visits that have been claimed, enabling them to address denials, rejections, and paid amounts. Figure 79. Billing page

1	MUL	BILLING												CNG HEALTH KOH	Hello, Gwyneth! LER-RICE (16 - CST)	0
F	Dashboard	PERSONAL FILTER	REJECTED VI	SITS DENIED	VISITS											
2	Discussions	FILTERS	1													*
	Authorizations	Sort by Date		Saved Filte	ers aved filter									EXPORT	FOR BILLING	©
•	Appointments															
9	Visits	MEMBER	DATE	CHECK IN TIME	CHECK OUT TIME	UPDATED DATE	EMPLOYEE AUTH #	SERVICE	APPT ID	CLAIM #	PAYER	STATUS	BILLED	PAID AMOUNT	BILLING STATUS	
-	Billing	Donald	02/15/2022	12:00 PM	12:30 PM	02/23/2022	Kay	\$5125	1.000		C8 Payer	Completed (Manual)	\$5.00	\$0.00	Generated	
	Members Employees	Bob	02/15/2022	09:35 AM	10:05 AM	02/16/2022	Amanda	\$5125	-		CB Payer	Completed	\$5.00	\$0.00	Generated	
	Settings	Donald	02/15/2022	08:00 AM	09:00 AM	02/23/2022	Gwyneth	\$5125	-		CB Payer	Missed and Completed (Manual)	\$10.00	\$0.00	Prebilling Rejection	
r	Provider Admin	Donald	02/12/2022	04:00 PM	04:30 PM	02/25/2022	Kay	\$5125			CB Payer	Missed and Completed (Manual)	\$5.00	\$0.00	Generated	
		Donald	02/11/2022	04.30 PM	05:00 PM	02/25/2022	Amanda	\$5125	10.4		CB Payer	Completed	\$2.50	\$0.00	On Hold	
		Donald	02/11/2022	12:10 PM	12:28 PM	02/17/2022	Amanda	\$5125			CB Payer	Completed	\$2.50	\$0.00	Generated	
		Donald	02/10/2022	04:00 PM	04:30 PM	02/25/2022	Kayaman Marina	85125	ian.		CB Payer	Missed and Completed (Manual)	\$5.00	\$0.00	Prebilling Rejection	
		Donald	02/10/2022	03:34 PM	04:12 PM	02/15/2022	Amanda	\$5125	1010		CB Payer	Completed	\$7.50	\$0.00	On Hold	
	4	Bob	02/10/2022	03:33 PM	03:55 PM	02/16/2022	Katie	\$5125	Contract of		CB Payer	Completed	\$2.50	\$0.00	Generate @ s	uppo

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** in the **FILTERS** component or the **Sort by** drop-down at the top left of the table (Figure 80).

	BILLING			Hello, Gwyneth! OCNG HEALTH KOHLER-RICE (16 - CST)
Dashboard	PERSONAL FILTER REJECTED VISITS DENIED VISITS			
Discussions	FILTERS			^
Authorizations	terre energy and the set			
Appointments		arch By Appt ID: pt ID	Search By Auth #:	Search By Claim #: CB Claim # or Payer Claim # Q
Ø Visits		Art Dates: 1/28/2021 Date	e Dates:	Payer:
💼 Billing	Search By Name or ID Q 11	1/28/2021 Date	▼ <u>12021 - 02/28/2022</u>	Select Payer
Members		rvice: Member	Status: t Billing Status	Pre-Billing Check(s): Select
Employees	Check In/Out Type: Offi	Date Date	gation Status:	
🔯 Settings	Select. •	Check In Time	t	
Provider Admin	O RESET FILTERS	Check Out Time		
	Sort by Saved Filters Date 4 Select a saved filter	Updated Date		T EXPORT FOR BILLING
	CHECK OUT	Employee		DILLED
	MEMBER DATE CHECK IN TIME TIME	Auth #	PPT ID CLAIM IF PAYER STATUS	AMOUNT PAID AMOUNT BILLING STATUS
	Donald 02/15/2022 12:00 PM 12:20 PM	02/22/2022 Kay 05125	CO Pauer Complete	ed 95.00 90.00 Generated 1

Figure 80. Billing page **FILTERS** and **Sort by** menu options

CLAIMS HISTORY

Once a completed visit has been exported for claims, the user can view details about the billing status and claim information by selecting the **menu icon (3 dots)** on the right side of the visit row and then selecting the **Visit Detail** (Figure 81).

Figure 81. Billing page menu icon (3 dots) and Visit Details link

0	Visits	MEMBER	DATE	CHECK IN TIME	CHECK OUT TIME	UPDATED DATE	EMPLOYEE AUTH #	SERVICE	APPT ID	CLAIM #	PAYER	STATUS	BILLED	PAID AMOUNT	BILLING STATUS	
血	Billing	Donald	02/15/2022	12:00 PM	12:30 PM	02/23/2022	Kay and a set of	\$5125	10.0		C8 Payer	Completed (Manual)	\$5.00	\$0.00	Generated	÷
~	Members Employees	Bob	02/15/2022	09:35 AM	10:05 AM	02/16/2022	Amanda and and a	85125	-		CB Payer	Completed	\$5.00	\$0.00	Generated	I,
\$	Settings	Donald	02/15/2022	MA 00.80	09.00 AM	02/23/2022	Gwyneth	\$5125	1000		CB Payer	Missed and Completed (Manual)	\$10.00	\$0.00	Prebilling Rejustion Visit Details	-
A	Provider Admin	Donald	02/12/2022	04:00 PM	04:30 PM	02/25/2022	Kay	S5125	-		CB Payer	Missed and Completed (Manual)	\$5.00	\$0.00	Authorization I Ger Member Detail	

Visit Details will provide information about the billing status In the *Billing* card (Figure 82) as well as claims information in the **CLAIMS HISTORY** tab.

Discussions	Member ID: Primary Phone: Primary Address:	Construction of the second of			
Authorizations	APPOINTMENTS VISITS	DETAILS	ALERTS CLAIMS HISTORY	CARE PLAN	OBSERVED CHANGES C
Appointments	01/15/2022 - 03/15/2022	Visit		Manual Entry	
Visits Visits Billing Members Employees Settings Provider Admin	Show All 02/25/2022 90 min (2 units) Kay S5125 02/23/2022 2 fmin (2 units) Amanda S5125 02/23/2022 2 fmin (2 units) Gwyneth S5125 02/15/2022 3 fmin (2 units) Gwyneth S5125 02/15/2022 30 min (2 units) Kay S5125 02/11/2022 30 min (2 units)	Appointment ID: Status: Authorization: Employee: Start Date/Time: End Date/Time: Start Location: End Location: Expected Duration: Payer Pre-billing Checks	Missed and Completed (Manual) Missed and Completed (Manual) Dispedition of the second secon	Created Date: Check in Date/Time: Check Out Date/Time: Visit Duration: Check Out Docation: Check Out Location: Acceptable Locatione: Manual Reason Code: Manual Notes: Member Attestation: Missed Visit	Feb 16, 2022 11:25 AM Feb 15, 2022 8:00 AM Fab 15, 2022 9:00 AM 1 hours 0 minutes (4 units) AVA Ne access to application or TVR No Attestation Caregiver forgot to check in / out Sensice provided as acheduled Caregiver sus unable to check in or or act the time of the visa; Corrected via Manual Entry later.
		Modifiers: Billing Status: Units: Add Note . Add Note .	None Prebiling Rejection		CANCEL SAVE

Figure 82. CLAIMS HISTORY tab and Billing card

The **CLAIMS HISTORY** tab displays the Billed Amount, Accepted Amount, Rejected Amount, Paid Amount, and Denied Amount for the visit. The user will also be able to access each individual claim request that was generated at the time the visit was exported for a claim, and dates associated with the status changes (Figure 83).

Dashl	board	rd DONALD Filmary Phone: Primary Address:										
Discu	ussions	AP	POINTMENTS VIS	iπs		DETAILS	ALERTS	CLAIMS HISTOR	Y CARE PLAN		SERVED	
Autho	orizations		01/15/2022 - 03/15/2022	-						CH	ANGES	
Appo	pintments		Show All	0		Billing					VOID VIS	ат.
Visits	8	02/25/2022 Kay		30 min (2 units) \$5125	î	Billed Amount		\$10.00 (4 units)				
Billing	g	02/23/2022 Amanda		25 min (2 units) \$5125		Accepted Amount Rejected Amount		80 (0 units) \$10.00 (4 units)				
Meml	nbers	02/23/2022 Gwyneth		2 hrs (8 units) \$5125		Paid Amount		80 (0 units)				
Emple	loyees	02/17/2022 Gwyneth		3 hrs (12 units) \$5125		Denied Amount		SO (O units)				
Settin	ngs	02/15/2022 Kay		30 min (2 units) \$5125		Claim Request # Katie - 02/23/2					VIEW CLAIM DETAILS	•
Emple	loyees	02/15/2022 Kay		30 min (2 units) \$5125		CLAIM #	PAYER CLAIM #	STATUS	EXTERNAL STATUS CODE	DETAILS	DATE/TIME	
Settin	ngs	02/15/2022 Gwyneth	6	1 hrs (4 units) \$5125		IA2355	: N/A]	Prebilling Rejection	VCR2025	Visit Checkin and Checkou overlaps with visit id(s) '559120'.	02/23/2022, 01:55 PM	
Provid	ider Admin	02/14/2022 Kay		30 min (2 units) \$5125		IA2355	N/A	New		339120.	02/23/2022, 01:55 PM	
		02/13/2022 Kay		30 min (2 units) \$5125		oluin Burnati	10005					
		02/12/2022 Kay		30 min (2 units) \$5125		Claim Request a Gwyneth - 02/					VIEW CLAIM DETAILS	ł.
		02/11/2022 Kay		30 min (2 units) \$5125		CLAIM #	PAYER CLAIM #	STATUS	EXTERNAL STATUS CODE	DETAILS	DATE/TIME	
		+ SCHEDULE A	PPOINTMENT		*	IA2289	N/A	Prebilling Rejection	VCR2025	Visit Checkin and Checkou overlaps with visit id(s) '659120'.	02/16/2022, 03:05 PM	
						IA2289	N/A	New			02/16/2022, 03:05 PM	

Figure 83. CLAIMS HISTORY tab details

EXPORT FOR BILLING

If visits need 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 84).

Figure 84. Billing page	EXPORT FOR	BILLING button
-------------------------	------------	----------------

1	THINK	BILLI	NG												CNG HEALTH KOP	Hello, Gwyneth! ILER-RICE (16 - CST)	Θ
H	Dashboard	PERS	SONAL FILTER	REJECTED VI	SITS DENIED	VISITS											
E	Discussions	FIL	TERS	- 64													~
Ê	Authorizations		Sort by		Saved Filt										EXPORT	FOR BILLING	0
	Appointments	1	Date	•	Select a s	aved filter	*										-
0	Visits		MEMBER	DATE	CHECK IN TIME	CHECK OUT TIME	UPDATED DATE	EMPLOYEE AUTH#	SERVICE	APPT ID	CLAIM #	PAYER	STATUS	BILLED	PAID AMOUNT	BILLING STATUS	
<u>ش</u>	Billing		Donald	02/15/2022	12:00 PM	12:30 PM	02/23/2022	Кау	\$5125	10.00		CB Payer	Completed (Manual)	\$5.00	\$0.00	Generated	:
•	Members		Bob	02/15/2022	09:35 AM	10:05 AM	02/16/2022	Amanda	\$5125			CB Payer	Completed	\$5.00	\$0.00	Generated	;
**	Employees		000	02/10/2022	02.00 AM	10.00 /00	UL IN LULL	THE R CONTRACT	00120	-		ou ruja		00.00	30.00	Generated	
\$	Settings		Donald	02/15/2022	08:00 AM	MA 00:90	02/23/2022	Gwyneth	\$5125	Mari		CB Payer	Missed and Completed (Manual)	\$10.00	\$0.00	Prebilling Rejection	:

The following billing statuses (Figure 85) are available in the CareBridge Solution and can be seen associated with Claim Requests.

Figure 85. Table of Billing Statuses and Definitions

BILLING STATUS	DESCRIPTION
Acknowledged	This visit has a claim that has been received by the MCO
Accepted	This visit's claim request was accepted by MCO/PASSE due to sufficient or valid data upon initial review.
Cancelled	This visit's claim request was cancelled.
Confirmed	This visit has a claim that was accepted by the MCO
Denied	This visit was denied by the MCO due to insufficient or invalid data upon review of the claim
Generated	This visit has a claim 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 was paid by the MCO
Pending	This visit has not yet been exported for claims
Pre-billing Rejection	This visit was rejected due to insufficient or invalid data prior to claim creation
Queued	This visit has been queued for claim generation
Rejected	This visit was rejected by the MCO due to insufficient or invalid data upon initial review of the claim
Submitted	This visit has a claim that has been submitted to the MCO
Voided	This visit claim was voided

BILLING REPORTS

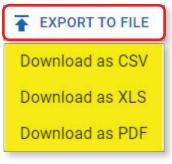
By default, the **PERSONAL FILTER** is selected upon navigating to the Billing page. It can be used to filter and sort the Billing table in a variety of ways to return the subset of billed visits that is most useful. In addition to the **PERSONAL FILTER**, there are two reports that have predefined filters to help quickly navigate to useful billed visits data (Figure 86).

orts
ort

- **REJECTED VISITS:** This report returns a list of all visits that have 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 at the bottom of the page (Figure 87). Upon selecting the file type, the document will begin downloading and will be available on the Settings page under the **DOCUMENTS** sub-tab.

Figure 87. Billing page **EXPORT TO FILE** drop-down menu and options



COMMUNICATIONS

OVERVIEW

The following sections will help introduce users to the features within the CareBridge Solution that enable communication both within a provider agency as well as between a provider agency and MCOs.

DISCUSSIONS

The Discussions page in the CareBridge Provider Portal allows agency employees to manage and prioritize inbound communications, act critical tasks, and communicate within the agency as well as with MCOs.

DISCUSSIONS NAVIGATION

Once on the Discussions page, the user will see a list of all open discussions that are currently unassigned. This list can be filtered by **Status**, **Assigned to**, and several other fields that are viewed by selecting the **expand arrow** to the right of the drop-down menus (Figure 88).

1		DISCUSSIONS				Hello CNG HEALTH KOHLER-F	D, Gwyneth! 😝
8	Dashboard	Status Select Assigned to Mer		DETAILS APPO	OINTMENTS VISIT	5	
F	Discussions	Type: Select • Internal/Shared: Select •	Donald E . MemberID: Primary Phone: P	rimary Address:			
Ê	Authorizations	Elden 2/16/2022 3:46 PM	Created by:	Gwyneth	Created date	02/16/2022 3:44 PM	1
	Appointments	Message	Type:	Message	Last Updated Date:	02/16/2022 3:44 PM	
0	Visits	Subject Fall Open	Subject: Description:	Loss of appetite Donald only ate half of his normal breakfast this	Status:	Open	1+
0	VISIUS	Donald 2/16/2022 3:44 PM		morning. He said he's not hungry. I asked, and he hasn't been snacking.	Assigned to:	Gwyneth	
血	Billing	Message		same a contra	Share with payer:	Select	1.4
0	Members	Subject: Loss of appetite Open		IN	KTERNAL		
**	Employees		Leave a comment		14 J		
\$	Smiphoye	+ NEW DISCUSSION	Enter a comment				
۵	Settings						
A	Provider Admin		B Attach File				CANCEL SEND
							1.1

Figure 88. Discussions page and navigation pane

Provider Portal Training Guide

Figure 89. Discussion Type drop-down menu

NEW DISCUSSION

There are five types of discussions that can be sent and received (Figure 89):

- Observed Changes: This discussion type allows caregivers to communicate that there have been changes to the member's condition. When Observed Changes occur, a discussion is auto generated and sent to the Discussions page for both the Provider and the MCO to view.
- Address Request: This discussion type allows Providers to request a new or updated member address from the MCO. When an Address Request occurs, a discussion is auto generated and sent to the Discussions page for both the Provider and the MCO to view.
- Phone Request: This discussion type allows Providers to request a new or updated member phone number from the MCO. When a Phone Request occurs, a discussion is auto generated and sent to the Discussions page for both the Provider and the MCO to view.
- **Message:** This Discussion type can be used for general messages between agency employees or between an Agency and the MCO.

To create a new message discussion, select the + NEW DISCUSSION button at the bottom of the list (Figure 88). The New Discussion dialog box will appear. It states, "If this is an urgent matter, please contact the case manager/care coordinator directly." If the matter is not urgent, and the user still needs to start a new discussion, they may then choose the discussion **Type** from the drop-down menu. After selecting a discussion Type, the user can complete the required fields prior to selecting SEND (Figure 90).

			New Discussion			×
New Discussion				atter, please contact t	he case manager / care coo	rdinator directly.
If this is an urgent matter, pl Type Message	lease contact the case manager / care coordinator directly.		Type Message		· ·	
Created by Gwyneth	Member Donald	.	Assigned to (optional) Gwyneth			
Status Open	Subject		Share with payer (optional) Unassigned			
Description				_		
			CANCEL	SEND		

Figure 90. + NEW DISCUSSION dialog

	Observed Changes		•	
	Address Request	e or ID	Q	
	Phone Request		٩	
	Message			
	01/28/2022	- 03/28/2022		
	Updated Dates	5		
	01/28/2022	- 03/28/2022	—	
	T E	EXPORT TO FILE]	
Donald	i i i i i i i i i i i i i i i i i i i	2/16/	2022 3:44	PM
Messa	ige			
Subjec	t: Loss of appetite		Оре	en
		1-2 0	f2 <	>

DISCUSSION ITEM DETAILS

Upon selecting a discussion, the user sees general details about that discussion in the **DETAILS** tab (Figure 91). 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.

Dashboard	Status: Select 👻 Assigned to Me			DETAILS	APPOINTMENTS	VISITS	
Discussions	Type: Select + Internal/Shared	Select.	Elden :	Primary Address:			
Authorizations	Assigned to		in the second se				
	Select	Ψ.	Created by: Type:	Gwyneth Message	Created date: Last Updated Date:	07/01/2022 1:38 PM 07/01/2022 1:38 PM	
Appointments	Member Name or ID	Q	Subject:	Test Message	Status:	Open	
Visits	Subject	Q	Description:	This is a test.	Assigned to:	Gwyneth	1.
Billing	Created Dates:				Share with payer:	Select	1
	06/01/2022 - 08/01/2022					0	
Members	Updated Dates:				INTERNAL		
Employees	06/01/2022 - 08/01/2023		Leave a comment				
Claims	EXPORT TO FILE		Enter a comment				
Settings	Elden 7/01 Message	/2022 1:38 PM *					
Provider Admin	Subject: Test Message	Open	Attach File			CANCEL	SEND

Figure 91. Discussions Details screen

There are few actions that can be utilized from a discussion:

- **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 the member's MCO, 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 the MCO can be facilitated through entering comments in the **SHARED** tab.

DASHBOARD & REPORTING

OVERVIEW

This section introduces the features 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 allows Agency Employees to view key metrics to better prioritize and manage tasks on which action may need to be taken. On the Dashboard page, there are tabs for each of the dashboards available (Figure 92).

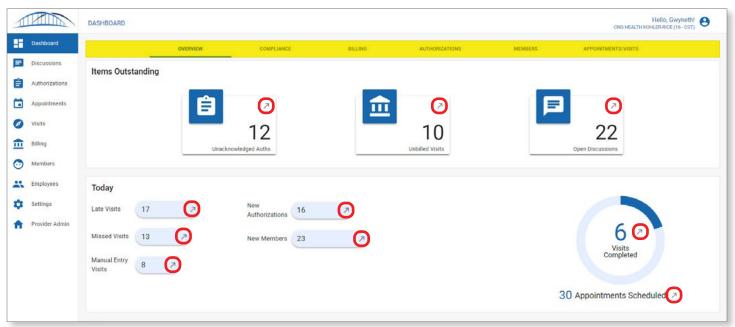


Figure 92. Dashboard page

- **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 (MCO). By selecting the **arrow icon** (Figure 92) on the top right corner of each metric or graph, 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 other reports that have predefined filters to help quickly navigate to useful subsets of data. The following (Figure 93) 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 MCO 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.
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 1 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 considered late when a Check-In has not occurred within 1 hour 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 MCO 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 3 hours of the appointment start time.
Missed Visits	VISITS	All missed visits. A visit could be considered missed when a Check-In has not occurred within 3 hours of the appointment start time.

<u> </u>	~~	D · /		D /	
Figure	93.	Provider	Portal	Reports	table

Payroll Report	EMPLOYEES	Payroll data for a given time for each employee based on completed visits in that time.
Rejected Visits	BILLING	All visits that have rejected claims.
Service Claims	VISITS	All completed non-EVV visits.
Unacknowledged Authorizations	AUTHORIZATIONS	All authorizations that have not been acknowledged or declined.
Unassigned Authorizations	AUTHORIZATIONS	All authorizations that have not 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 users will find **OFFICES**, **GROUPS**, **DOCUMENTS**, **RATES**, **BILLING**, and **VENDOR** sub-tabs (Figure 94).

	SETTINGS						Hello, Gv CNG HEALTH KOHLER-RICE (yneth!
Dashboard	Offices Set up and manage offices	OFFICES					+	NEW OFFICE
Authorizations	2. Groups Set up and manage groups	NAME	ADDRESS	ADDRESS 2	СІТҮ	STATE	ZIP CODE	0
 Visits Billing 	Documents View and download documents	Main Office Satellite Office 01	Testing St.		Testing	NJ	01234	1
Members Employees	Rates Manage service codes and rates	Laramie	123 Main St		Laramie	WY	82070 Rows per page: 10 + 1-3 of 3	1 < 1 >
Settings	Billing Manage claims generation options							
	Vendor View vendor details							

Figure 94. Settings page

OFFICES

Offices are a way for Provider Agencies to configure multiple physical locations within the CareBridge Provider Portal. Employees/caregivers and members can be assigned to Offices to better drive the scheduling of caregivers to members and to enable the running of reports filtered 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 95).

THE Hello, Gwyneth! SETTINGS New Office × Dashboard Offices OFFICES Street Address Line 1 Discussions 9 Street Address Line 2 (optional) Authorizations 0 Zip Code Set up and manage groups City NAME ADDRESS ADDRESS 2 ZIP CODE Appointments Main Office Ø Visits Documents Satellite Office 01 Testing St. Billing 123 Main St Laramie 5 Members Edit Office × Rates Employees c to c. Satellite Office 01 Settings S Billing 9 Testing St. Provider Admin 0 Zin Cod Vendor View vendor details NJ · 01234 Testing DELETE CANCEL SUBMIT

Figure 95. 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 caregiver when scheduling appointments.

To create a new Group, the user selects the **+ NEW GROUP** button at the top of the Groups table. To edit a Group, they select the **menu icon (3 dots)** next to the Group, then **Edit Group** (Figure 96). There are two types of Groups that can be created – **Employee** and **Member**.

	SETTINGS			CNG HEALTH KO	Hello, Gwyneth!
Dashboard	Offices Set up and manage offices	MEMBER GRO	UPS EMPLOYEE GROUPS		+ NEW GROUP
Authorizations	Groups Set up and manage groups	NAME Nut Allergy	* OF MEMBERS	×	i
Visits	Documents View and download documents		Group Type: Belect	Roms per page, 10 +	Edit Group
Members Employees	Rates Manage service codes and rates		Group Namy Member	Edit Group Group Type: Member	×
Settings	Billing Manage claims generation options			Group Name Has Cats	
	Vendor View vendor detaila			DELETE CANCEL	SUBMIT

Figure 96. GROUPS sub tab and menu icon (3 dots) with + NEW GROUP and Edit Group screens

DOCUMENTS

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 generates in the background and displays in this list. When the user navigates to the **DOCUMENTS** sub-tab, they may choose to download any document by selecting it's **download icon** on the far right of the table (Figure 97).

Figure	97.	DOCUMENTS	sub-tab
--------	-----	-----------	---------

SETTINGS				Hello, Gwyneth! CNG HEALTH KOHLER-RICE (16 - CST)
Gffices Set up and manage offices	DOCUMENTS			
Groups Set up and manage groups	NAME	USER	DATE/TIME	G
Documents View and documents	Billings xls	Amanda	02/25/2022 11-28 AM	Completed
Rates Manage service codes and rates	Employees.csv Visits.pdf	Amanda -	3:37 PM 02/23/2022	Completed
S Billing			1.54 FM	Rows per page: 10 ∞ 1-3 of 3 < 1
	Offices Set up and manage offices Set up and manage offices Set up and manage groups Set up and manage groups Documents View and download documents View and download documents Manage service codes and rates. Manage claims generation options		Offices DOCUMENTS Set up and manage offices Image offices Croups Set up and manage groups Set up and manage groups Image offices Documents Billings.xls View and download documents Employees.csv Manage service codes and rates. Visits.pdf Kables Image claims generation options	Offices Set up and manage effices Croups Set up and manage groups Documents View and download documents Manage service codes and rates Manage service codes and rates Billing Manage claims generation options

CANCEL SUBM

RATES

The Provider Agency is responsible for adding rates within the Provider Portal. If the Provider Agency negotiated a different rate for specific services, the user will need to add that rate by clicking the + New Rate button in the top right of the Rates sub-tab (Figure 98).

Authorizations Authorizations Appointments Visits Billing Were and devended decomments Users Billing Members Employees Billing Provider Admin Provider Admin Filters Filters Filters Payer Settings Billing Provider Admin Provider Admin Filters Filters Filters Payer Settings Members Billing Mendige service codes and sates 10/12/2020 10/12/2020 Provider Admin Settings Settings Provider Admin Provider Admin Settings	Discussions	Giffices Set up and manage offices	RAT	ES							+ NEW
Appointments Settings Provider Admin Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vendor Vend			Filters		New Rate	2	×				
Billing Documents Documents <thdocuments< th=""> <thdocuments< th=""></thdocuments<></thdocuments<>	Appointments				Payer	Select		New Rate	•	×	
Billing 05/11/2021 12 Modifier 1 Select Service Code S5130-HOMEMAKER NOS.P Image: Service Code and rates Employees Billing 12/03/2020 12 Modifier 2 Select Modifier 1 Select Image: Service Code and rates Image: Service Code and rates	Visits		UPDATED DATE	EF D/		Select	· ·	Payer	CB Payer	•	0
Employees Mailes 12/03/2020 12 Modifier 2 Select Modifier 1 Select Modifier 2 Select Modifier 3 Select Modifier 4 Select Modifier 4 Select Modifier 3 Select Modifier 4 Select Modifier 3 Select Modifier 4 Select			05/11/2021	12	Modifier 1	Select	Ŧ		S5130 - HOMEMAKER NOS, P_	-	18
Settings Billing Madifier 3 Select. Madifier 2 Select Madifier 2 Provider Admin Vendor 06/25/2020 07 Modifier 4 Select Modifier 3 Select Image: Select			12/03/2020	12	Modifier 2	Select		Modifier 1	Select	-	
Provider Admin Auslige claims generation options Modifier 4 Select Modifier 3 Select Provider 3 Select <t< td=""><td></td><td>G Billing</td><td>10/12/2020</td><td>10</td><td>Modifier 3</td><td>Select</td><td></td><td>Modifier 2</td><td>Select</td><td>*</td><td></td></t<>		G Billing	10/12/2020	10	Modifier 3	Select		Modifier 2	Select	*	
Velow vendor details 06/25/2020 01 Effective Member Suzanna **********************************	Provider Admin	Manage claims generation options	06/25/2020	01	Modifier 4	Select	×	Modifier 3	Select	*	15
06/25/2020 01 Start Date Member Effective Effective 06/27/2022 D		Vendor View vendor details	06/25/2020	01	Member	All Members		Modifier 4	Select	-	3
06/27/2022			06/25/2020	01				Member	Suzanna	-	3
	LING								06/27/2022		

Figure 98. RATES sub-tab and menu icon (3 dots) with + NEW RATE and Edit Rate screens

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 a 3rd party billing solution. Navigating to the Settings page in the left navigation bar of the Provider Portal and clicking on **Billing** will bring up the BILLING sub-tab (Figure 99). It contains a list of Payers available in the users' state, and each one has its own card. In Iowa, the only available option is to bill through EVV.

Figure 99. **BILLING** sub-tab

	SETTINGS		Helio, Gwynethi O CNG HEALTH KOHLERRICE (16 - CST)
Dashboard	Offices Set up and manage offices	BILLING	
Authorizations	Set up and manage groups	CB Payer Allow billing through EVV Bill through EVV Bill through EVV	*
Visits	Documents View and download documents	Allow billing externally	
Members Employees	Rates Manage service codes and rates	None	SAVE CHANGES
Settings	Billing Manage claims generation options		
	Vendor View vendor details		

CareBridge

The EXPORT FOR BILLING function will automatically default to the Agency's current settings. The CareBridge system won't allow users to choose an option that they don't have, based on their market. If an option is grayed-out, it means the Agency doesn't have that capability (Figure 100).

2 Visits will be exactly a set of the set	xported for billing	and will be a	vailable for viewing	on the Billing Page		
MEMBER	DATE	APPT ID	STATUS	PAYER	BILLING ACTION	
Donald	02/15/2022		Missed and Completed (Manual)	CB Payer	Bill through EVV	
Donald	02/10/2022	and a	Missed and Completed (Manual)	CB Payer	Bill through EVV	

Figure 100. EXPORT FOR BILLING dialog

VENDOR

TEN

The EVV VENDOR sub-tab is a read-only view of the Providers' current EVV vendor. This sub-tab (Figure

101) allows integrated providers using the CareBridge Portal to see what associated EVV vendors CareBridge has on record.

For additional resources, it's easy to 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 100) or

Figura	101	VENDOR	sub_tab
riguic	101.	VLINDON	300-100

THE	SETTINGS			Hello, Gwynethi CNG HEALTH KOHLER-RICE (16 - CST)			
Dashboard	Gffices Set up and manage offices	EVV VENDOR					
Authorizations	Groups Set up and manage groups	Filters					⊙
Visits	Documents View and download documents	VENDOR NAME CareBridge	PAYER CB Payer	EFFECTIVE START DATE 02/10/2020	EFFECTIVE END DATE	UPDATED DATE 02/10/2022	
Members	Rates Manage service codes and rates				Ro	nsperpage \$≠ 1of1 <	1.5
Settings	Biling Manage claims generation options						
	Vendor View vendor details						

Figure 102. Provider Portal profile icon by following this link: <u>https://resources.carebridgehealth.com/evv</u>



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 updated lists.

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.

Managed Care Organization (MCO) – The member's health plan. The health plan is contracted with the Iowa Medicaid Enterprise for coordination of members' care and benefits.

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

Payer – The Managed Care Organization (MCO) that reimburses the provider agency for services rendered.

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