Care Director Provider Portal Training Manual

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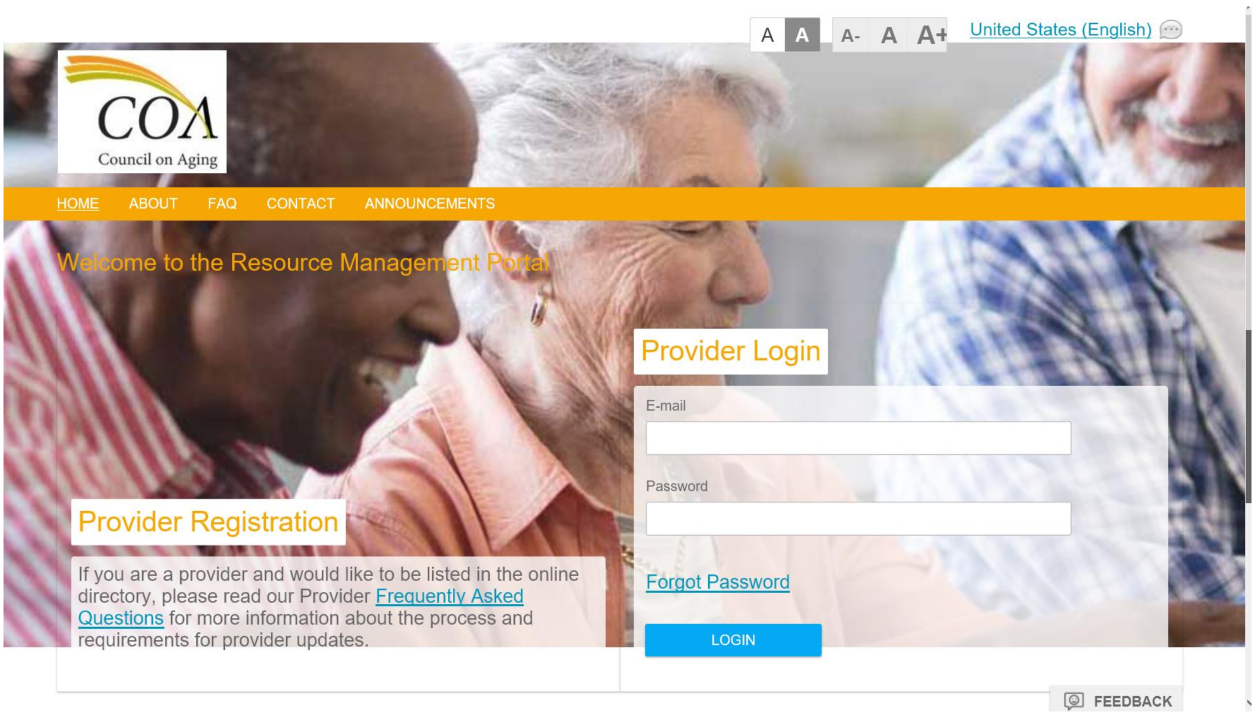
Provider Portal

The Provider Portal is designed to allow providers to access and send information, related to only their active clients to COA. From the portal, providers are able to view and, in some instances, add or edit the information. The information available to provider includes:

- Announcements, Contact Information and FAQs
- Accept request for Services
- Service Authorizations
- Details related to provider and the provider contracted services
- Billing and payment information.

In order to access the portal the COA Provider Staff will send you an email with login information.

Provider Website

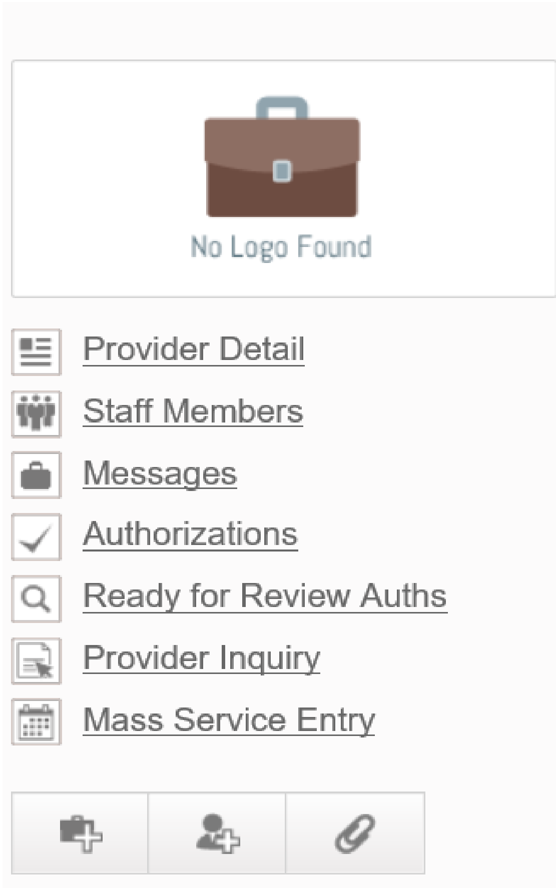


Prior to logging into the portal, the user will be able to view the following:

- Information regarding COA under the **About** tab.
- **FAQs** include information related to creating an account or reset password, it can also contain information related to specific department or activities such as finance of provider services.
- Providers are able to send a general message or inquiry using the **Contact** tab.
- **Announcements** are used to publish information out to everyone.

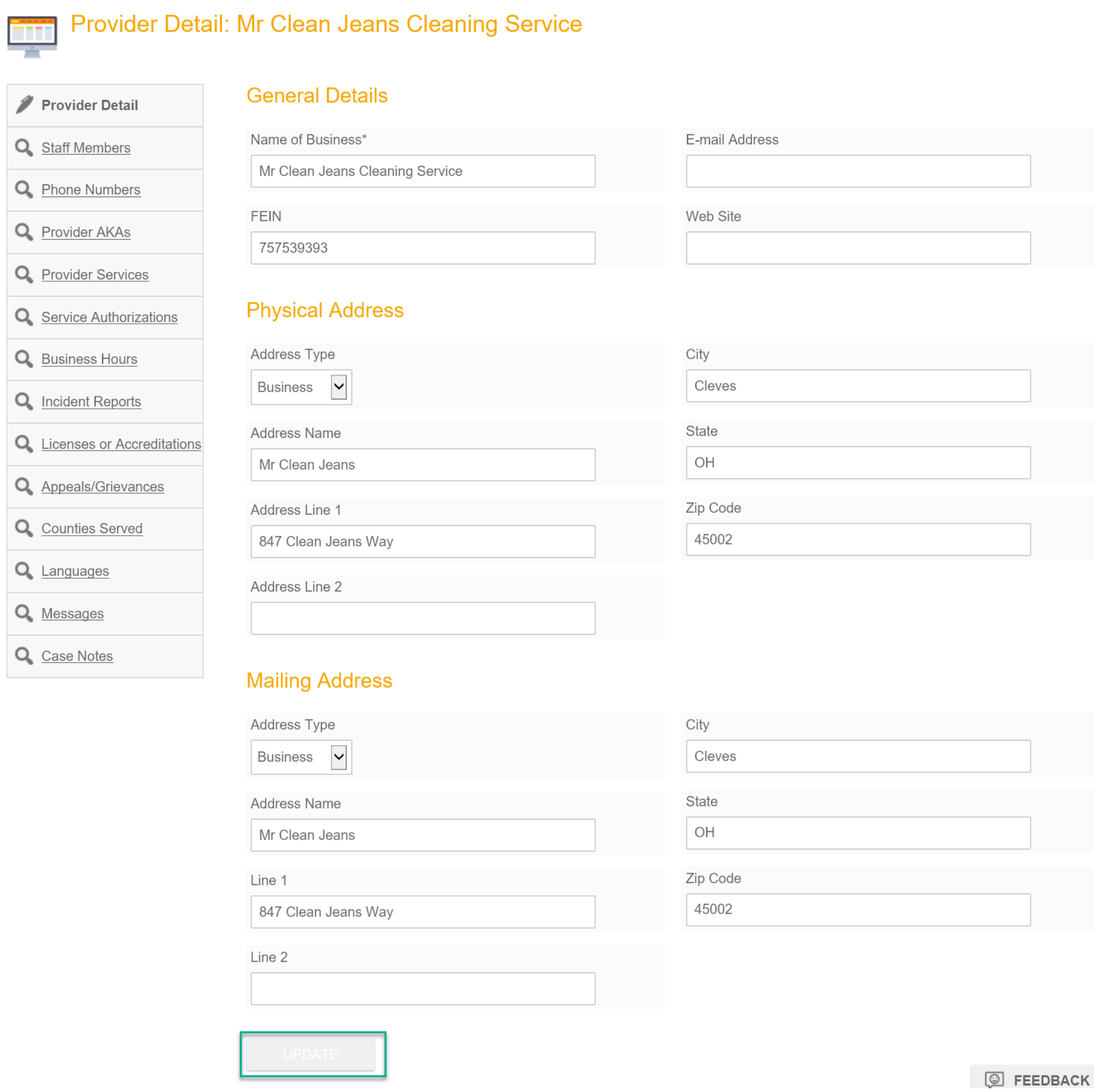
Provider Homepage

Once the Provider staff has logged in they will arrive at the provider homepage.



Provider Details

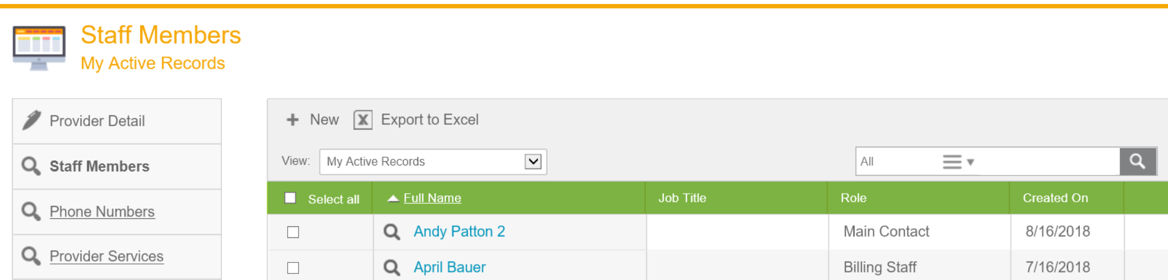
Provider Details include general details and address information related to the provider. The provider will be able to make updates in this section.



Staff Members

The user can access staff member from the Provider Home Page and under Provider Details

Staff Members – the provider can view, and search staff who can access the portal. The information can also be exported to Excel.

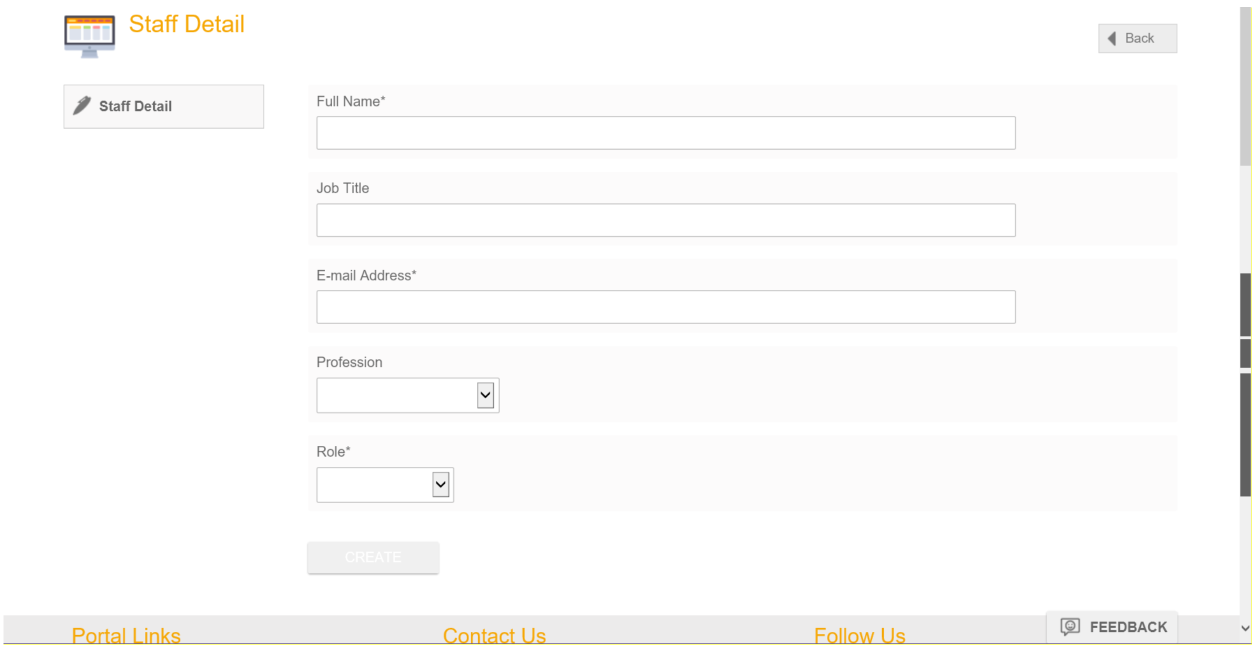


Update Staff Information

To update a staff member, click on + New and the following webpage will be displayed. The following information is required:

- Full Name
- Email Address
- Role

Once the information has been entered the user will click on “Update” at the bottom of the form.



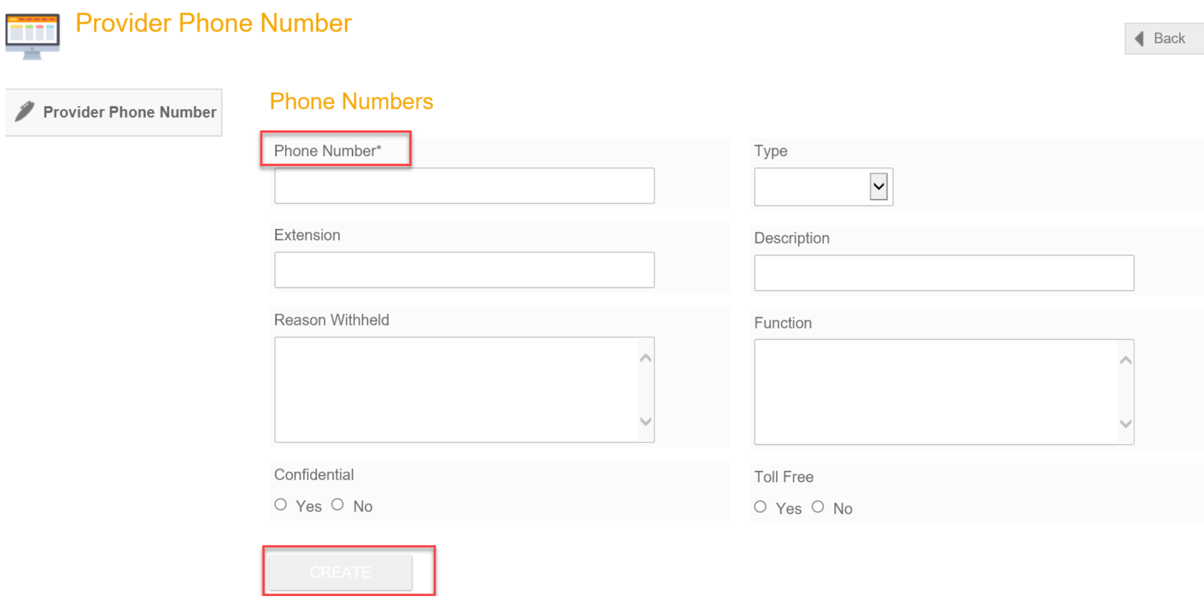
Phone Numbers

Phone Numbers - the provider can add, view, and search phone numbers associated to the provider. The information can also be exported to Excel.

Adding a Phone Number

To add a phone number the user clicks on + New from the Phone list view,

and the system will display the Phone Number screen, the user is required to enter at least the Phone number and click on create. To return to the Provider detail page they will just click on the “Back” button in the upper right.

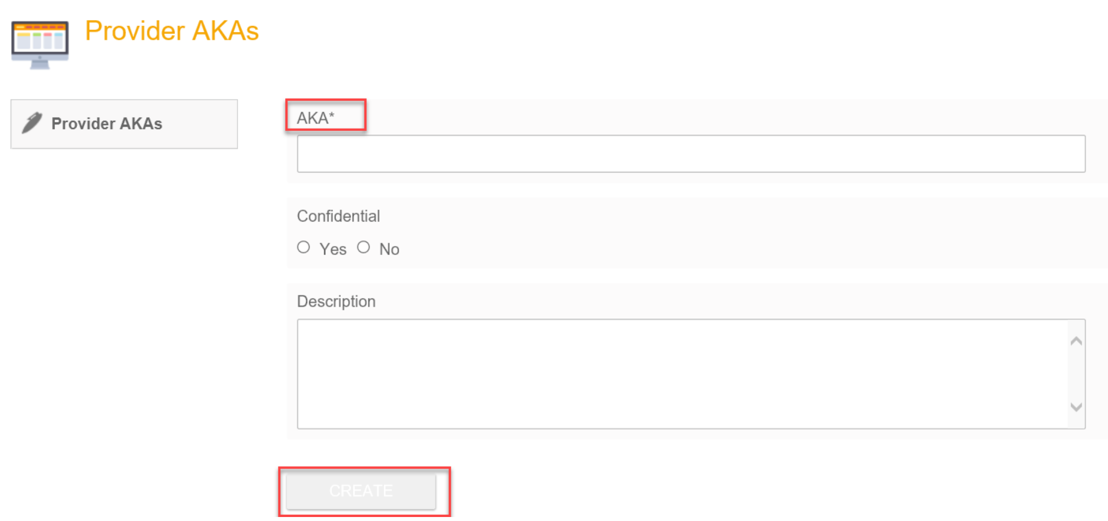


Provider AKAs

This allows COA to capture other names the provider may be known as, the Providers legal entity should ALWAYS be the name listed in the Provider Details. From the Provider AKA, the provider can add, view, search, and activate AKAs associated to the provider. The information can also be exported to Excel.

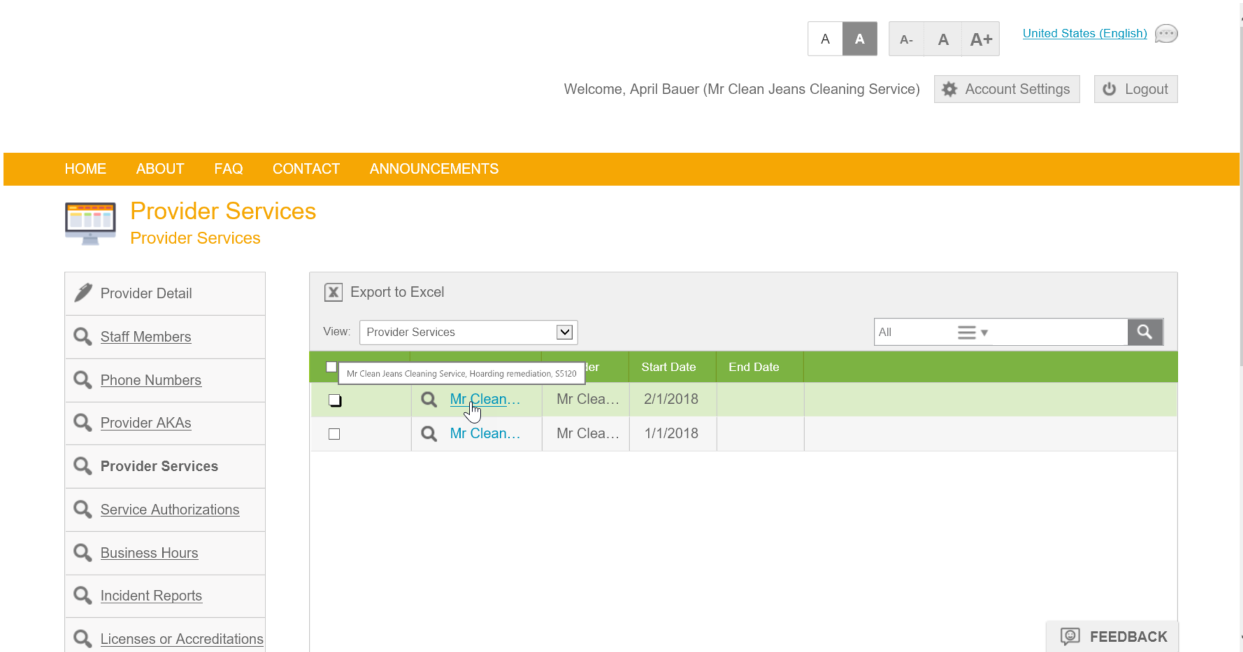
Adding a Provider AKA

To add a Provider AKA in the portal the user would click on + New and enter the AKA name on the Provider AKA screen and click on Create. Once the AKA has been created click on "Back" to return to the Provider AKA main view.

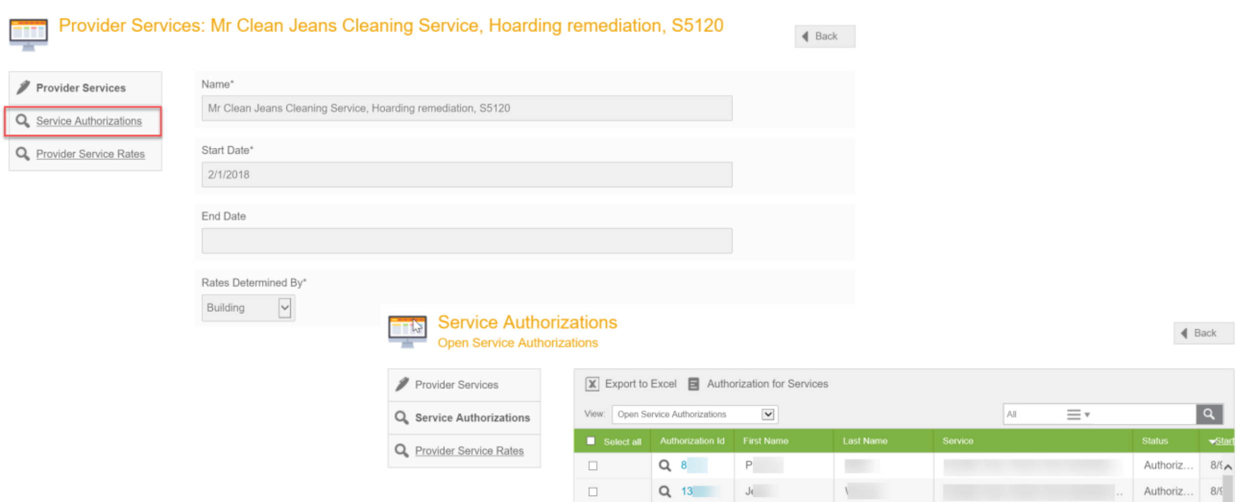


Provider Services

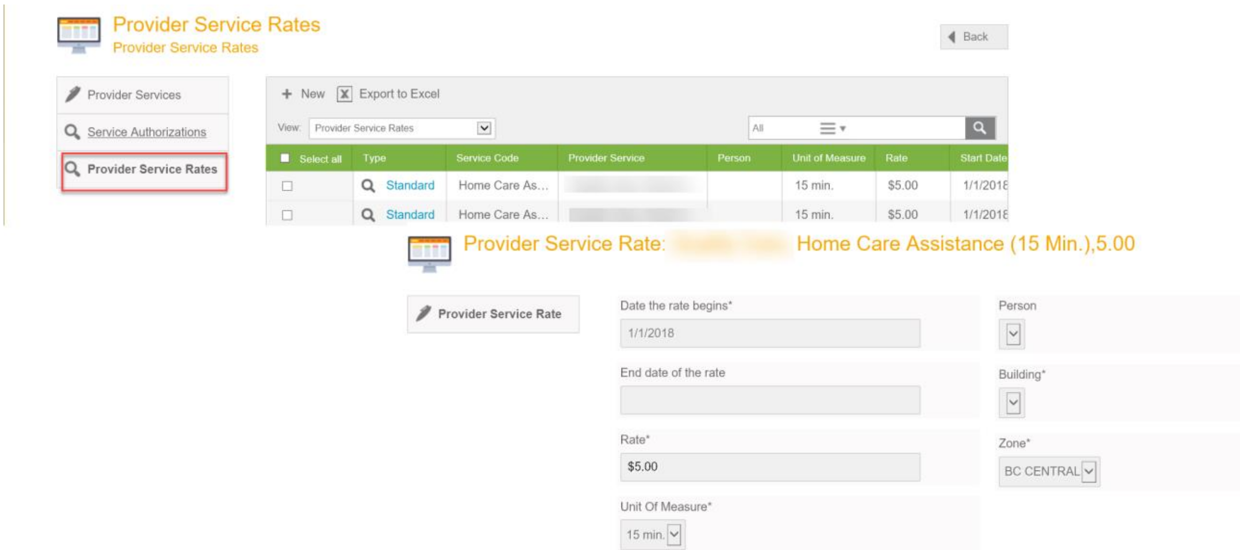
The Provider Services area allows Providers to see the services they are contracted to deliver. Providers can select a service and view details related to the service including the service authorizations and rates associated with the service. The list can also be exported to Excel.



By hovering over the Blue hyperlink, you are able to see the service, and by clicking that link the details related to the Provider Service including the start date of the service, and the Rates and Service Authorizations attached to the Provider Service.



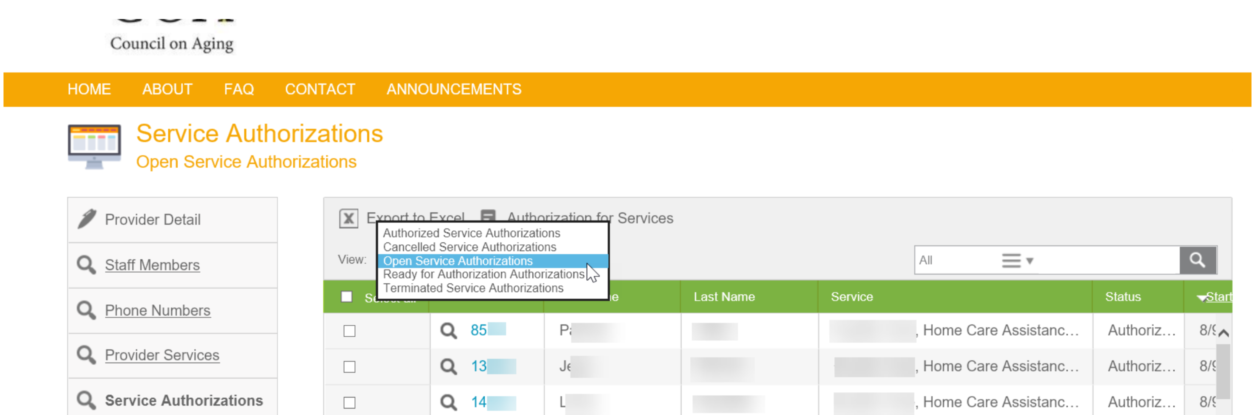
The provider can also view the rates attached to the service, by selecting Provider Services rates and then click on the Blue hyperlink, which opens the Provider rates screen. On the provider rate screen you can see detail regarding the Start date of the rate, if the rate is a person, building or zone rate and for who or where and the unit of measure attached to the rate.



Service Authorization

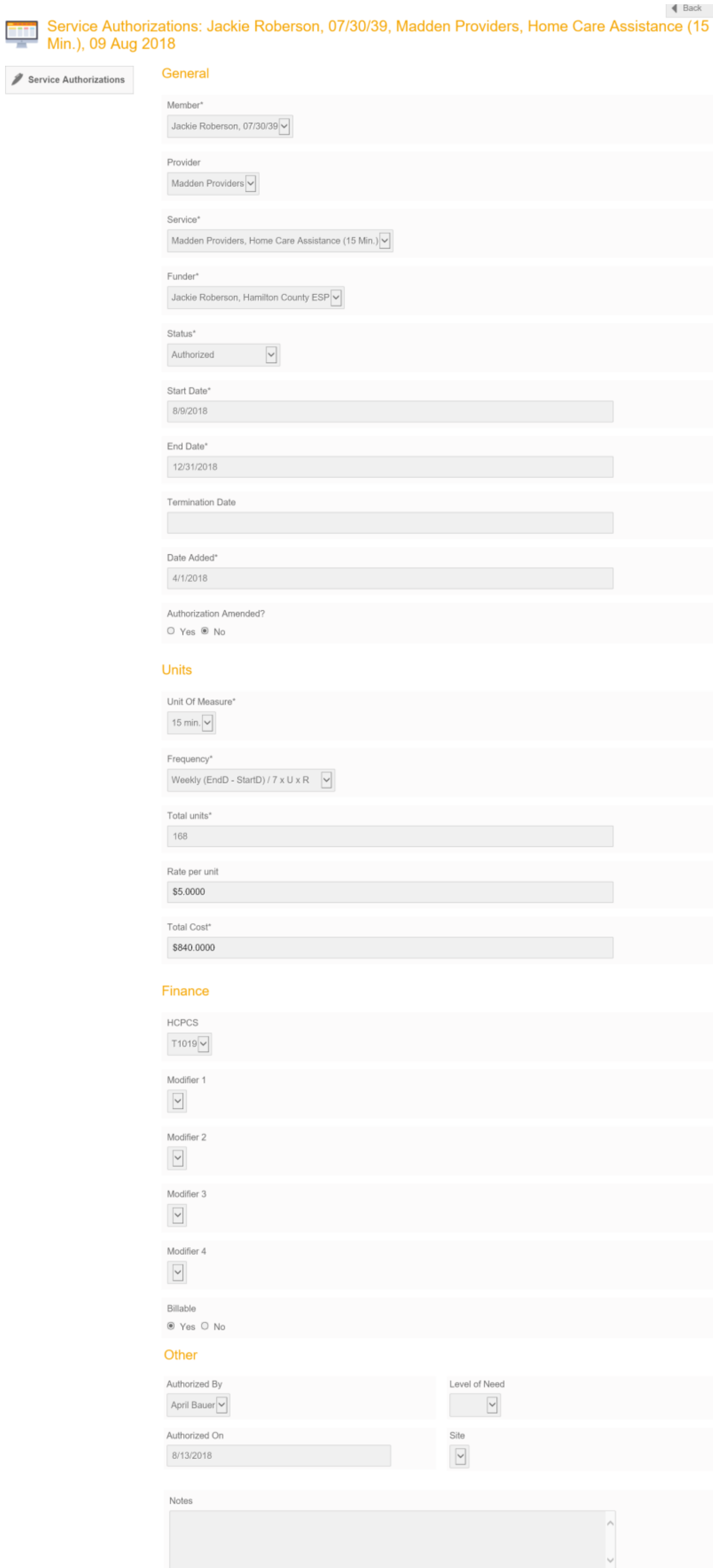
Providers can select Service Authorization under Provider Detail or from the Provider Homepage under Authorizations. Providers can sort and view service authorizations, by status, can select and open the authorizations, see service transactions that have been submitted, invoiced or cancelled against the authorization, or print the service authorization or export a list to Excel. Providers can view services authorization in the following statuses:

- **Authorized Service Authorizations** – this will show all authorizations that have been authorized, even after the end date of the authorization for up to 6 months.
- **Cancelled Service Authorizations -** shows all authorizations that have been cancelled, for any of the following:
  - The provider failed to respond within the required timeframe.
  - The provider declined the request made on an authorization.
  - The person chose another provider to deliver the service.
- **Open Service Authorizations** – these are service authorizations for people currently getting services from the provider.
- **Ready for Authorization Authorizations** – this provides a listing of the authorizations you have accepted.
- **Terminated Service Authorizations -** this provides a listing of the authorizations have been terminated for whatever reason.



Providers can click on the Blue hyperlink to open an individual service authorization to view details that include the following:

- Person name and Date of Birth
- Service to be delivered
- Funder
- Status of the Authorization
- Start and End Date of Authorization, if the authorization has been terminated it will display the last date services can be billed for
- Unit of Measure
- Frequency the Units are to be delivered on
- Total # of units available for the timespan of the authorization
- Rate per unit
- Total cost of the authorization
- HCPCs and Modifiers needed for billing
- Notes

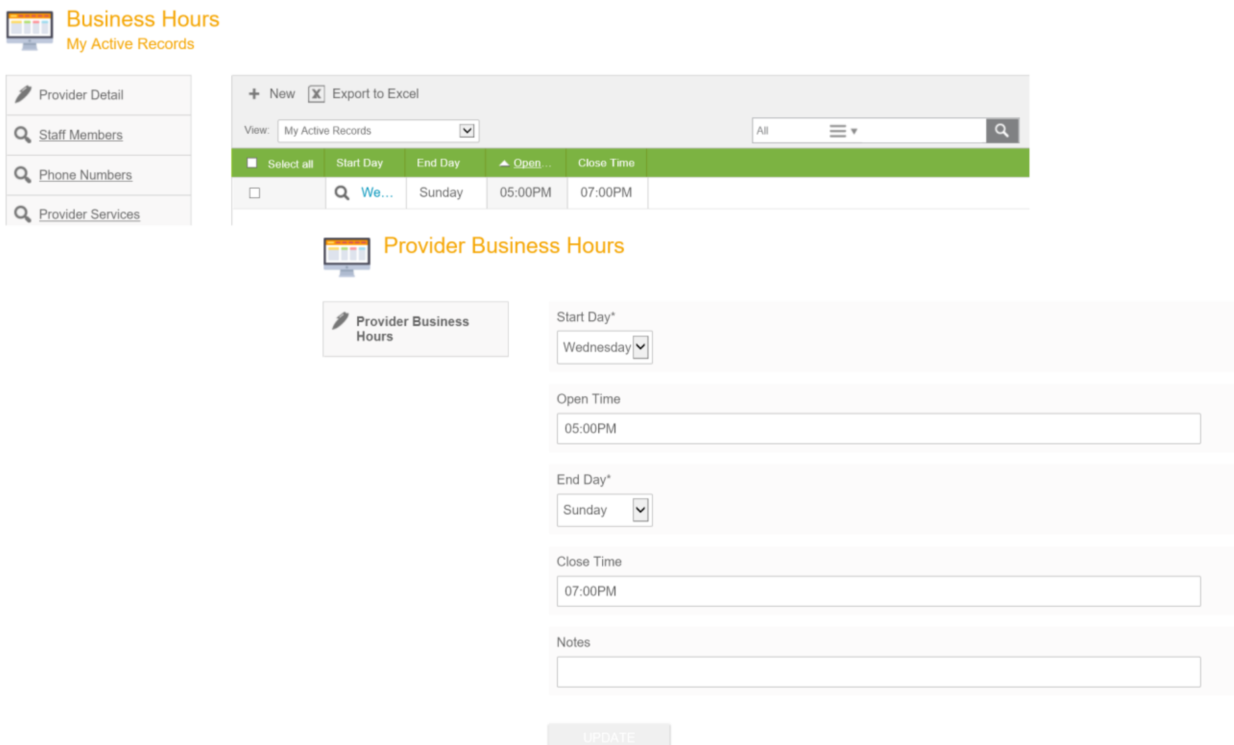

Back
Service Authorizations: Jackie Roberson, 07/30/39, Madden Providers, Home Care Assistance (15 Min.), 09 Aug 2018
Service Authorizations
General
Member*
Jackie Roberson, 07/30/39
Provider
Madden Providers
Service*
Madden Providers, Home Care Assistance (15 Min.)
Funder*
Jackie Roberson, Hamilton County ESP
Status*
Authorized
Start Date*
8/9/2018
End Date*
12/31/2018
Termination Date
Date Added*
4/1/2018
Authorization Amended?
Yes No
Units
Unit Of Measure*
15 min.
Frequency*
Weekly (EndD - StartD) / 7 x U x R
Total units*
168
Rate per unit
$5.0000
Total Cost*
$840.0000
Finance
HCPCS
T1019
Modifier 1
Modifier 2
Modifier 3
Modifier 4
Billable
Yes No
Other
Authorized By
April Bauer
Level of Need
Authorized On
8/13/2018
Site
Notes

Business Hours

If the Provider choses, they can add, view, and search hours of business associated to the provider. The information can also be exported to Excel.

Adding Business Hours

If the provider decides to add business hours they can click on + New and enter the start and end time including Am and PM and days of the week. Once finished entering information click on "Create"

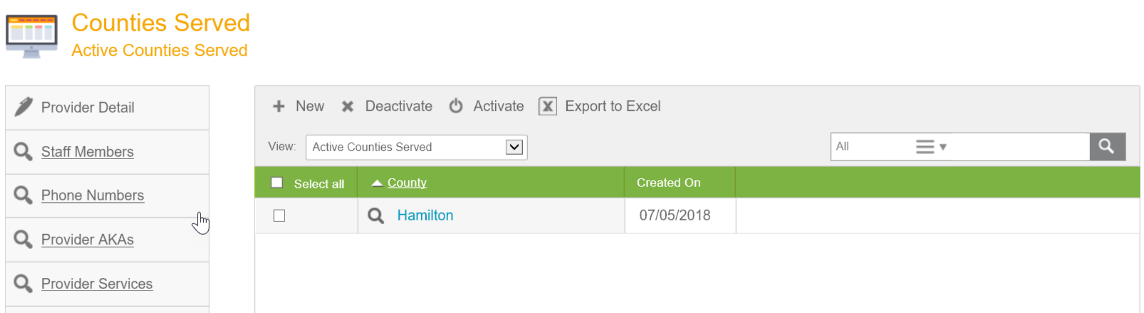


Incident Reports

This feature will be available on a later date.

Counties Served

Counties Served is a listing of the counties in which the provider is contracted to deliver services.



Languages

If the Provider choses, they can view, search, and activate hours of business associated to the provider. The information can also be exported to Excel.

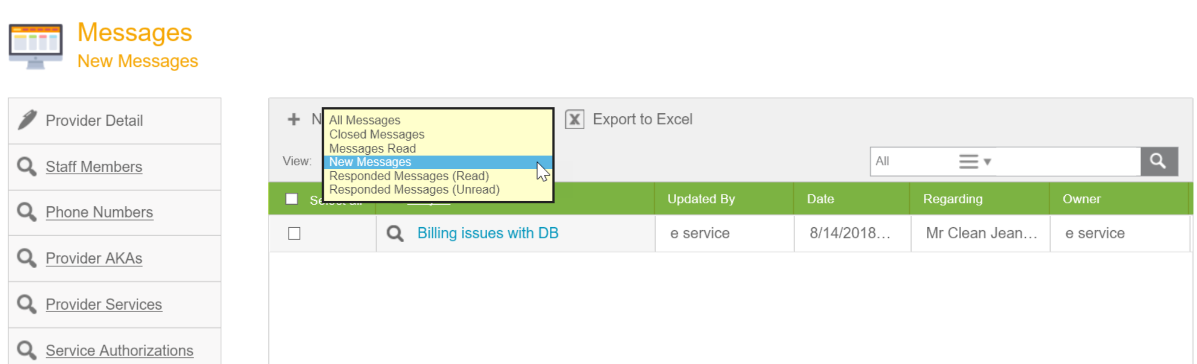
Adding Languages

If the provider decides to select languages they can click on the  and enter the languages provider has the ability to serve from the dropdown box. Once finished entering information click on “Create”

Messaging

Messages are used to communicate between the provider and COA. Messaging keeps a chain of the conversation between the provider staff and COA staff related to the message. Messages can also be exported to Excel

Messages can be accessed from either the Provider Homepage or under Provider Detail.



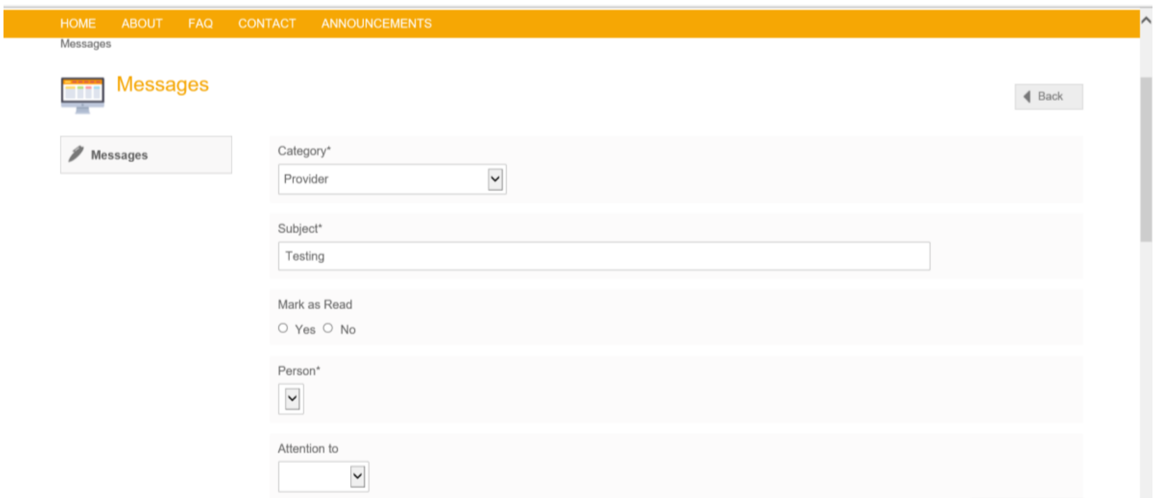
From the view you can select to see the following:

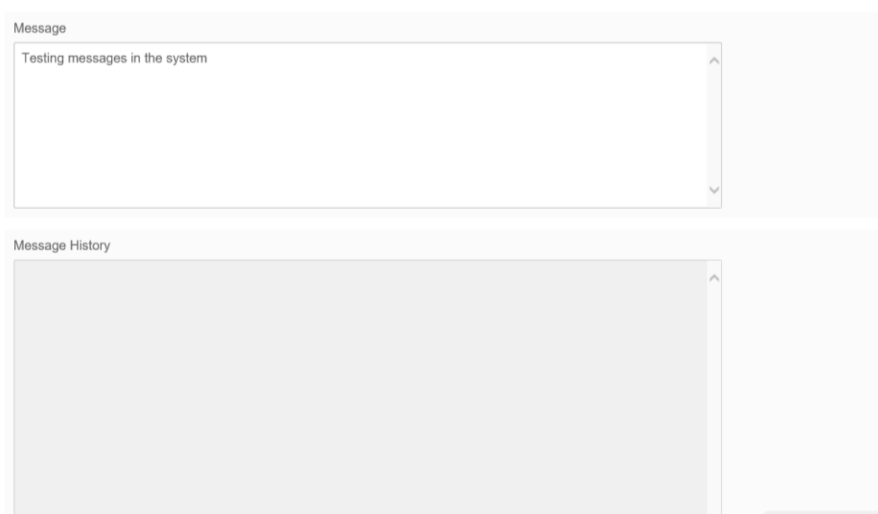
- **All Messages -** All messages exchanged
- **Closed Messages -** Messages that all no longer active

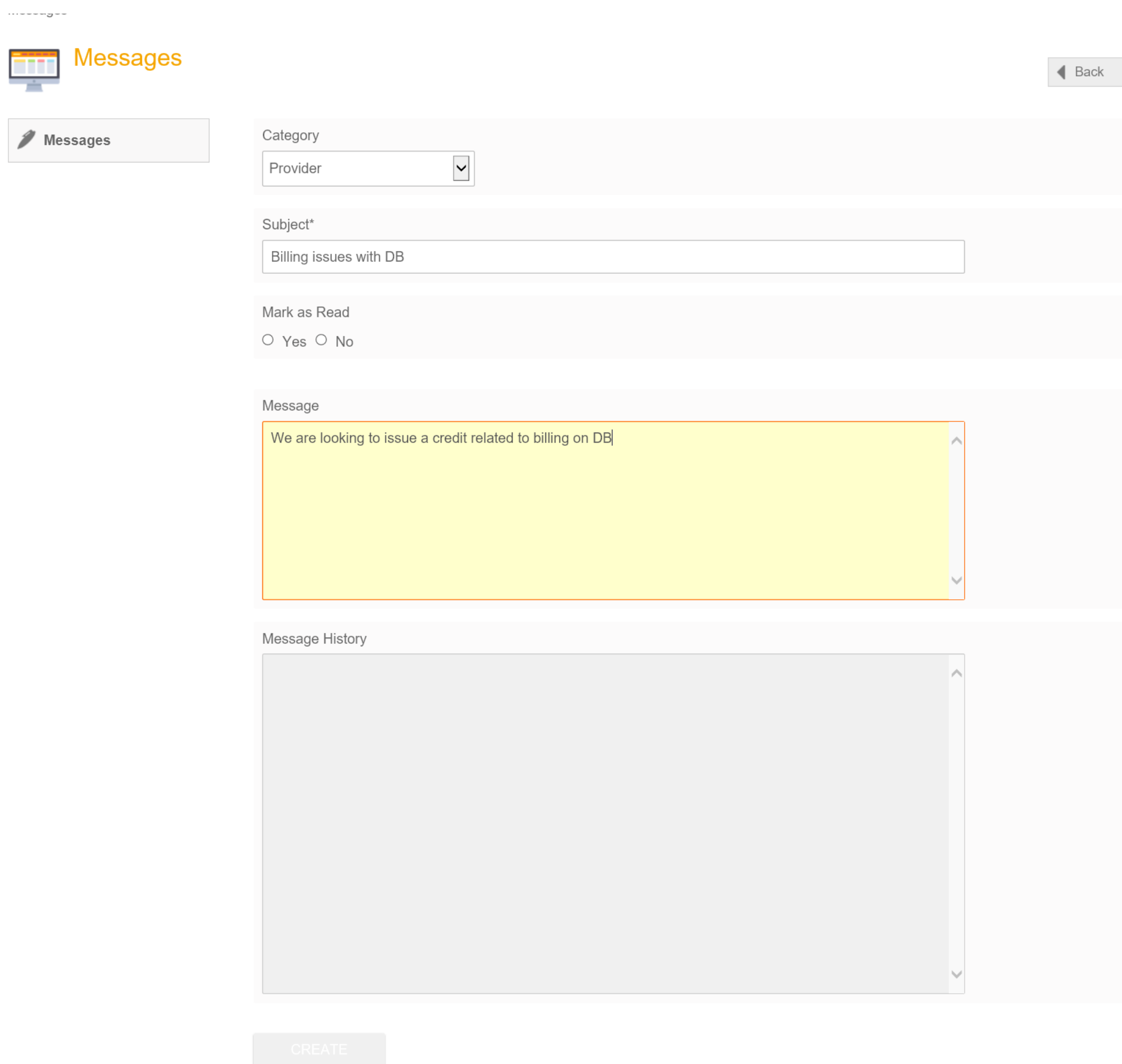
- **Messages Read -** Messages that have been read
- **New Messages -** New messages that have been sent to you
- **Responded Messages (Read) -** Messages that have responses and that the responses have been read
- **Responded Messages (Unread) -** Messages with responses that have not been read

New Messages

To create a message, click + New. Select "Provider" in category field, enter a subject, enter Attention to, and then type your message into Message window. Once finished entering information click on "Create"



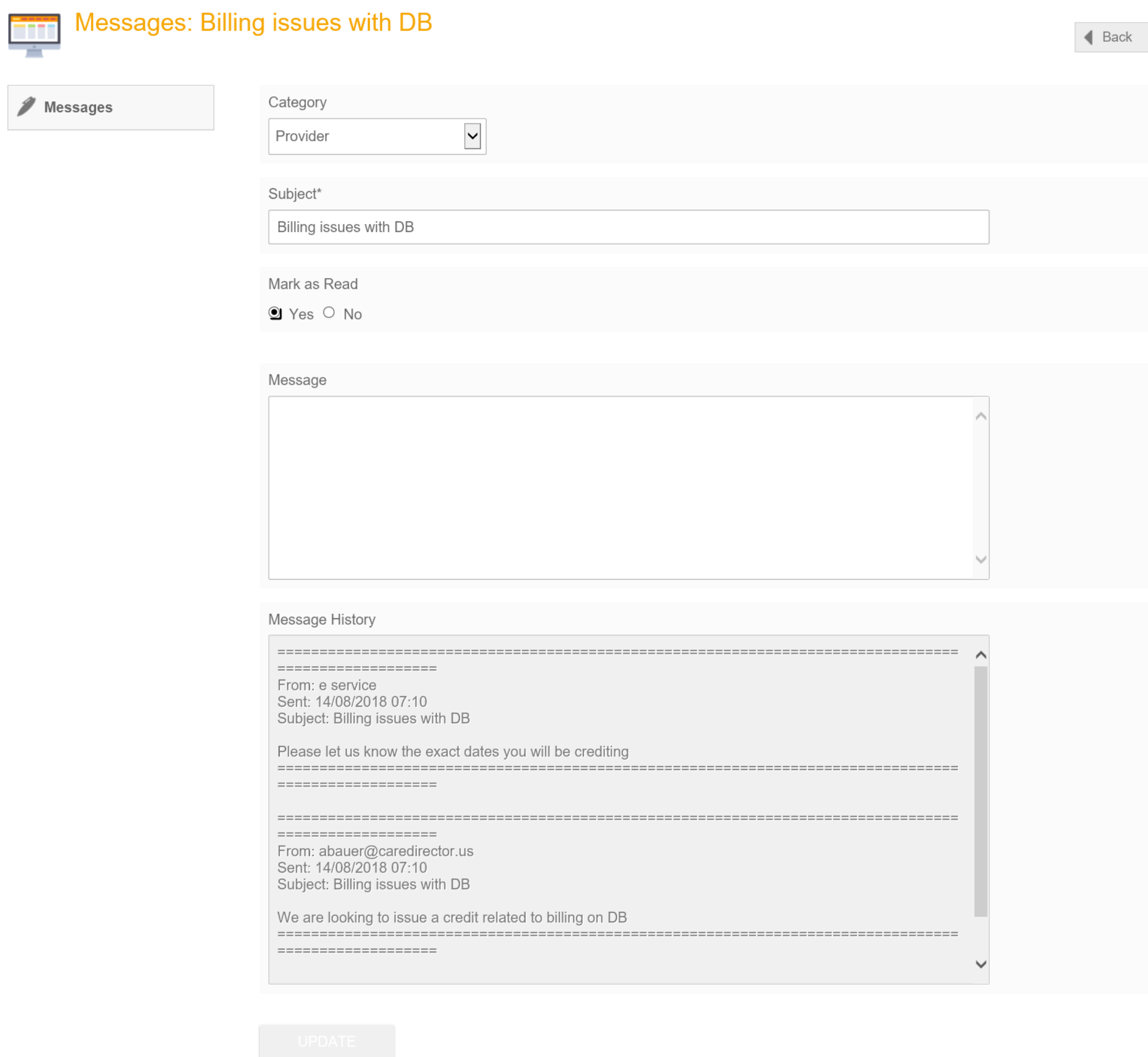




Messaging History

The Message History can be viewed by opening the message and reading the information in the Message History section of the message. If you need to respond to the message you can respond by entering the information in the Message section and click on Update at the bottom of the screen.

From Message History you are able to see the complete conversation regarding the issue.

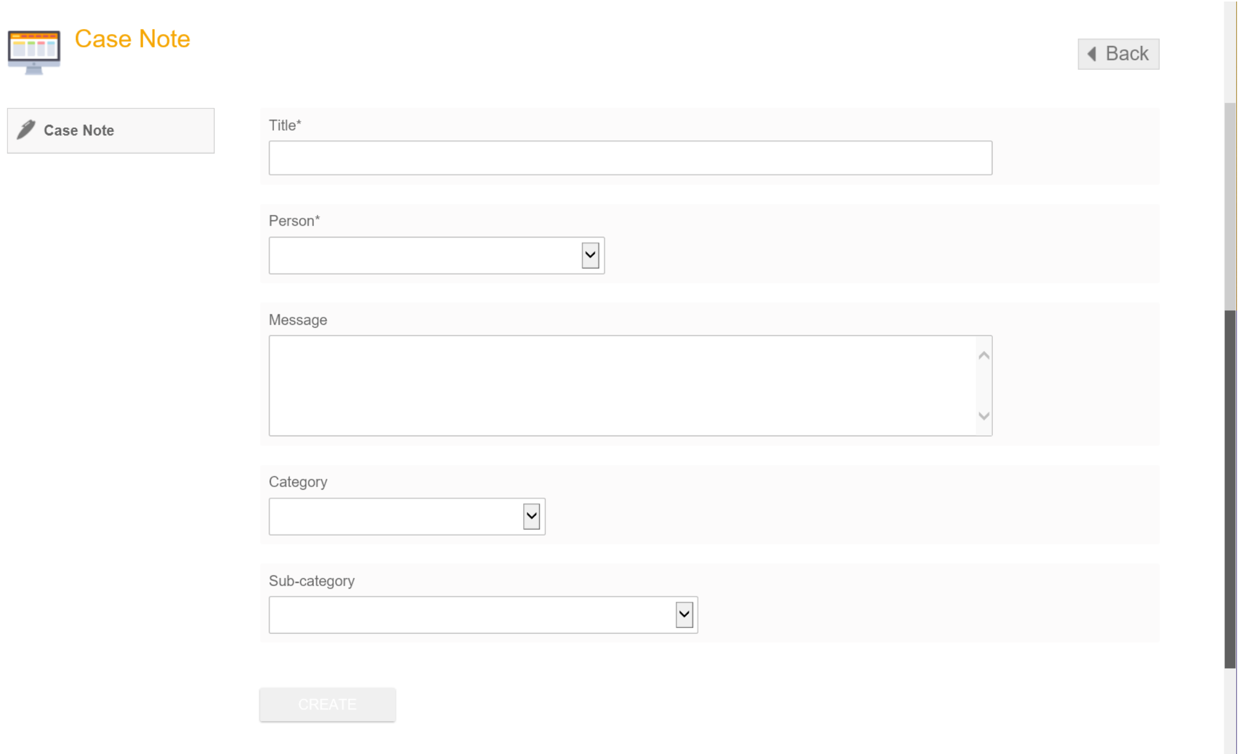


Case Notes

Case Notes were designed to let the provider enter a related to a specific Person. To create a Case Note, select Case Notes under Provider Details. You will need to enter the following required fields:

- **Title** – the is a brief description of the issue
- **Person** – select the person the case note is regarding.
- **Message** – the information you want to document on the person.
- **Category** – the category of the case note.
- **Subcategory** – the subcategory of the case note.

Once you have completed the note click on , and the note will be saved on the person's record.



Ready for Review Authorization

The Ready for Review Authorization screen allows the provider to review, enter a cost per unit if the service is a bid service, add notes and accept or decline a request for services.

The following information will be present in the comment section for referrals sent to the providers:

<u>**HCA RFS**</u>
Schedule: Start date, List preferred day, number of units, preferred time of day
Tasks: General cleaning, laundry, grocery shopping, PC, running errands, provide respite time for CG
Smoker/Non-Smoker
Pets
Contact: List who provider should contact to setup service
(e.g. Clt is need of 2 units of HCA service per week to assist with general cleaning starting MM/DD/YYYY. Clt is requesting HCA service on Tuesdays late mornings. Clt is non-smoker and does not have any pets. Please contact clt directly to setup service. Please let me know if you have any questions. Thanks, CC's Name, 592-2800)

<u>**HDM RFS**</u>
Schedule: Start date, list preferred day, number of units per week
Regular/Therapeutic meals (if therapeutic meals are required RX will need to be obtained)
Contact: List who provider should contact to setup service
(e.g. Clt is need of 5 HDMs per week. Clt is requesting to receive HDMs on Tuesdays. Please contact clt directly to setup service. Please let me know if you have any questions. Thanks, CC's Name, 592-2800)

<u>MT/NMT RFS</u>
Schedule: Start date, monthly schedule include number of units clt is approved to receive per month
Specific needs: Clt needs to be transported by wheelchair. Clt will have escort to/from MD appointments. Clt needs hands on assistance with transferring 02 tank and walker in/out of vehicle
Contact: List who provider should contact to setup service
(e.g. Clt is in need of 4 units of MT per month. Clt needs assistance with transferring self and 02 tank in/out of vehicle. Please contact clt's dtr in order to setup service. Thanks, CC's Name, 592-2800)

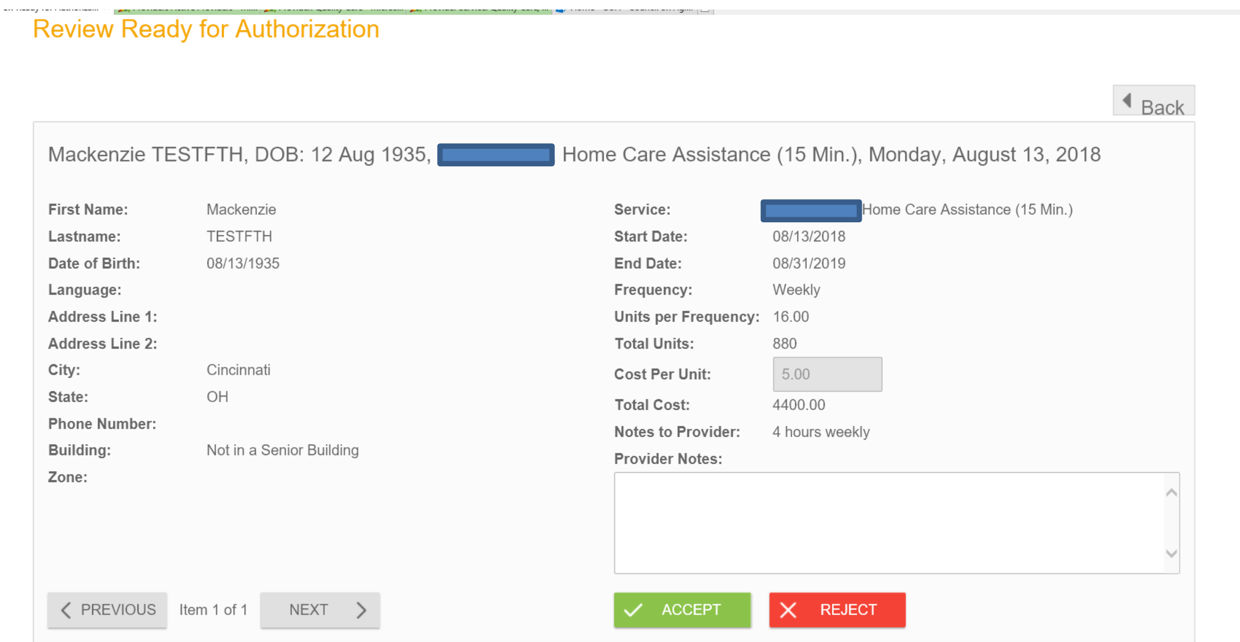
<u>DME RFS</u>
Description of item: RTS with arms and include if item needs to be installed
Clt's weight and height: 192 lbs. and is 5'9"
Contact: List who provider should contact to setup service
Installation required: Yes/No
RX required: Yes/No
(e.g. Clt is in need of RTS with arms installed. Clt is approximately 192 lbs. and is 5'9". Please contact clt's son to setup delivery. Thanks, CC's Name, 592-2800)

<u>ILA RFS</u>
Schedule: Start date, List preferred day, number units per month, preferred time of day
Tasks: Reading mail, paying bills, setting up MD appointments
Smoker/Non-Smoker
Pets
Contact: List who provider should contact to setup service
(e.g. Clt is need of 4 units of ILA service per month to assist with reading mail, paying bills, and setting up MD appointments. Clt is requesting HCA service on Tuesdays late mornings. Clt is non-smoker and does not have any pets. Please contact clt's dtr (Pam 555-1212) to setup service. Please let me know if you have any questions. Thanks, CC's Name, 592-2800)

<u>ADS Direct Award</u>
Schedule: Start date, preferred weekly schedule
Transportation/No transportation
Enhanced or Intensive
Contact: List who provider should contact to setup service
(e.g. Clt and clt's family is in need of enhanced AD service 3x per week. Clt's dtr is requesting AD service on M, W, F. Transportation to/from is required. Please contact clt's dtr to setup service. Thanks, CC's Name, 592-2800)
*****Clt's family will need to select an AD facility. CCS will need to contact AD facility prior to creating a direct award to check facilities availability on requested days.***

<u>EMS Direct Award</u>
Type of pendant: Necklace/Wrist
Type of phone line: Cable/Land line/Cell phone
Lock box required: Yes/No
Contact: List who provider should contact to setup service
(e.g. Clt is in need of a necklace pendant. Clt has a land line. Clt is requesting a lock box to be installed. Please contact clt's dtr Joanna (555-1212) to schedule a time to install equipment. Thanks, CC's name, 592-2800.)

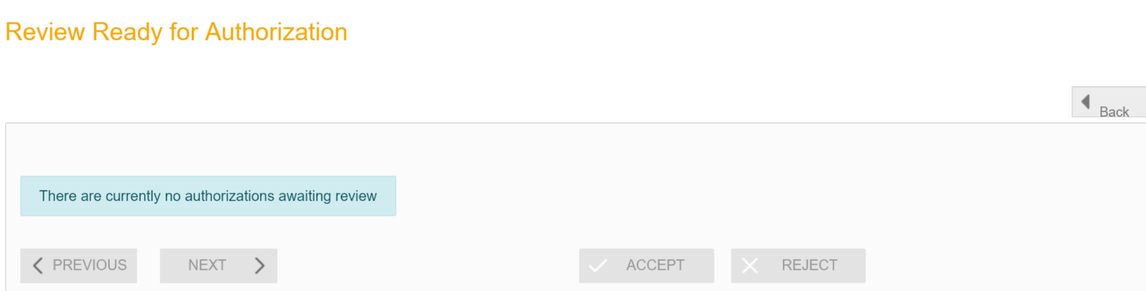
<u>ALZHE Direct Award</u>
Contact: List who should be contacted to schedule consultation
(e.g. Clt and clt's family is in need of consultation to provide education on the progression of the disease and begin discussion on long term care options. Please contact clt's spouse Bob to schedule consultation. Thanks, CC's name, 592-2800)



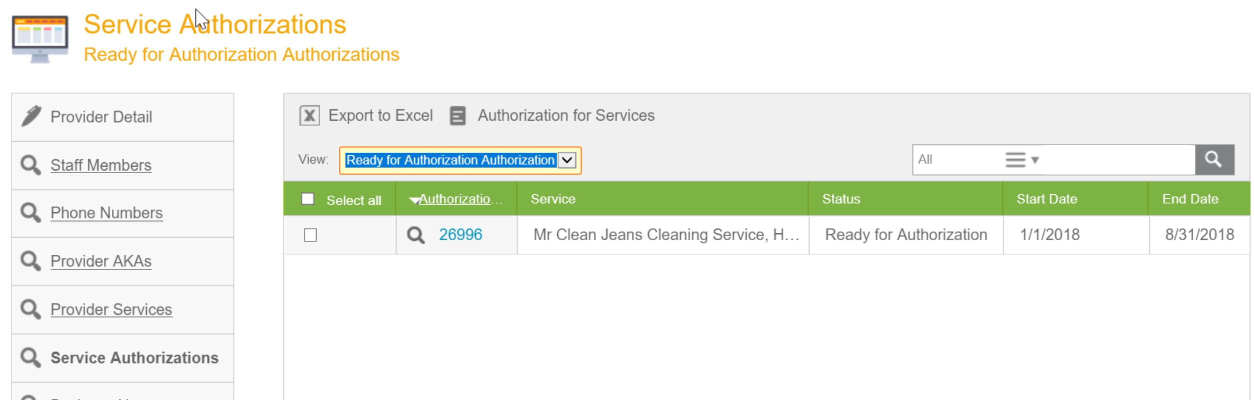
The Ready for Authorization screen gives the provider the following information related to the request:

- Person's Name
- Person's Date of Birth
- Person's Address
- In the person is living in a specific "Building" or "Zone"
- Service to be provided
- Start and End date of the service period
- The frequency the service will be provided and the number of units per frequency
- Total number of units to be provided during the timespan specified
- Cost per Unit
- Total cost of the service for the timespan specified
- Any notes to the Provider

Once you click the "Accept" button the next authorization to be reviewed will be displayed. When all authorizations have been reviewed you will see screen below.



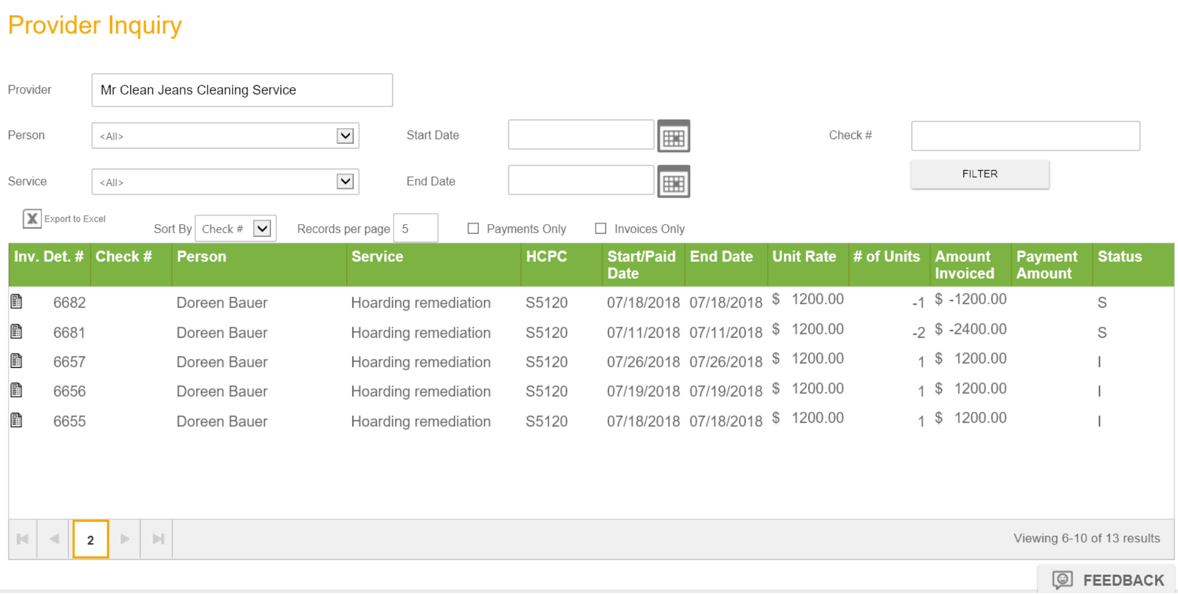
If you want to see all authorizations, click on the "Back" button and select Service Authorizations. Change the "View" to Ready for Authorization.



If you fail to respond to the Ready for Authorizations in a timely manner the authorizations will be cancelled due to failure to respond and they will be reviewable under the Cancelled authorization view.

Provider Inquiry

The screen was designed to give you a view into your billing, invoicing and payments.



You can filter the view in multiple ways to see specific pieces of information, this includes:

- **Person -** you can choose to see "All" people or just one person by choosing them in the drop down list.
- **Service** – you can choose to filter by "All" services that have been contracted for or just a specific service.
- **Start and End Dates** – you can restrict what you are viewing by entering a timespan.
- **Check #** - once you have received notification of the EFT (check) you would be able to filter by the EFT number and the system will return all the people who had been paid by that EFT.

You can also sort the information by:

- Check Number
- Person
- Service
- Paid Date

You can specify the number of record to display per page, if you want to see just invoices or just payments. Once you have your selections made Click on "Filter" and the system will refresh the view. The information display can be exported to Excel by click on the "Export to Excel" button.

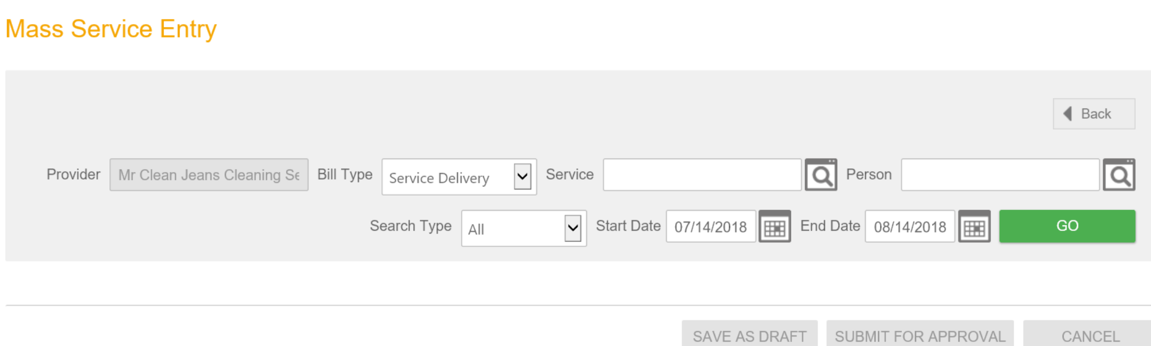
Mass Entry

Providers have three ways to submit billing to COA:

- **Mass Entry** – the provider is able to pull up a list of people and services with a calendar view and entry the units provided on each day.
- **Excel Spreadsheet** – they can "Attach" an Excel spreadsheet with billing information.
- **837 billing files** – the provider can choose to submit an 837 file by using the attachment function.

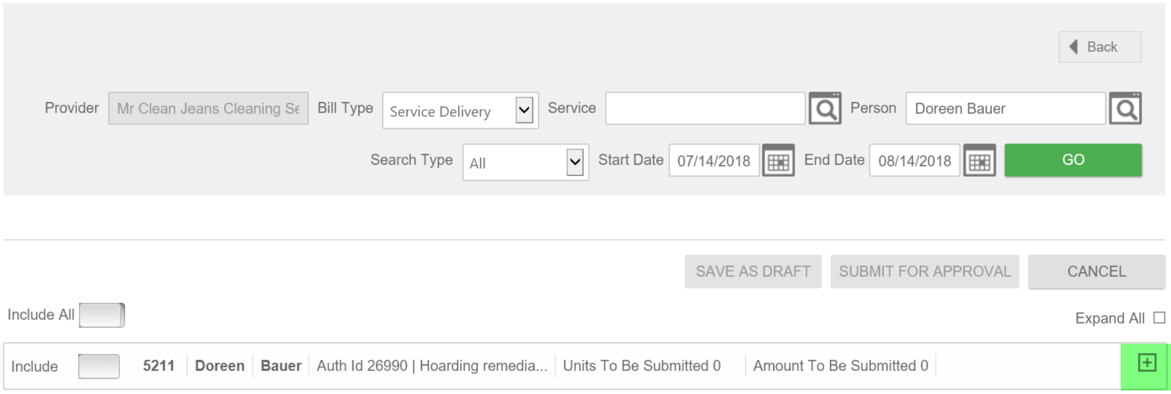
To utilize the Mass Entry Screen the user will select mass entry and the Mass Entry screen will display. The "Bill Type" will be Service Delivery, if you provide multiple services, you should filter by service. You can do this by click on the looking glass and selecting the Service. You are also able to filter by person. You can select the start and end date of the timespan they want to bill for and then Click on "Go".

The system will only allow you to bill for dates that are within the allowable timespan set by COA.



Once the system has displayed the list of people to bill, you will click on the "+" to expend the detail to get the calendar view.

Mass Service Entry



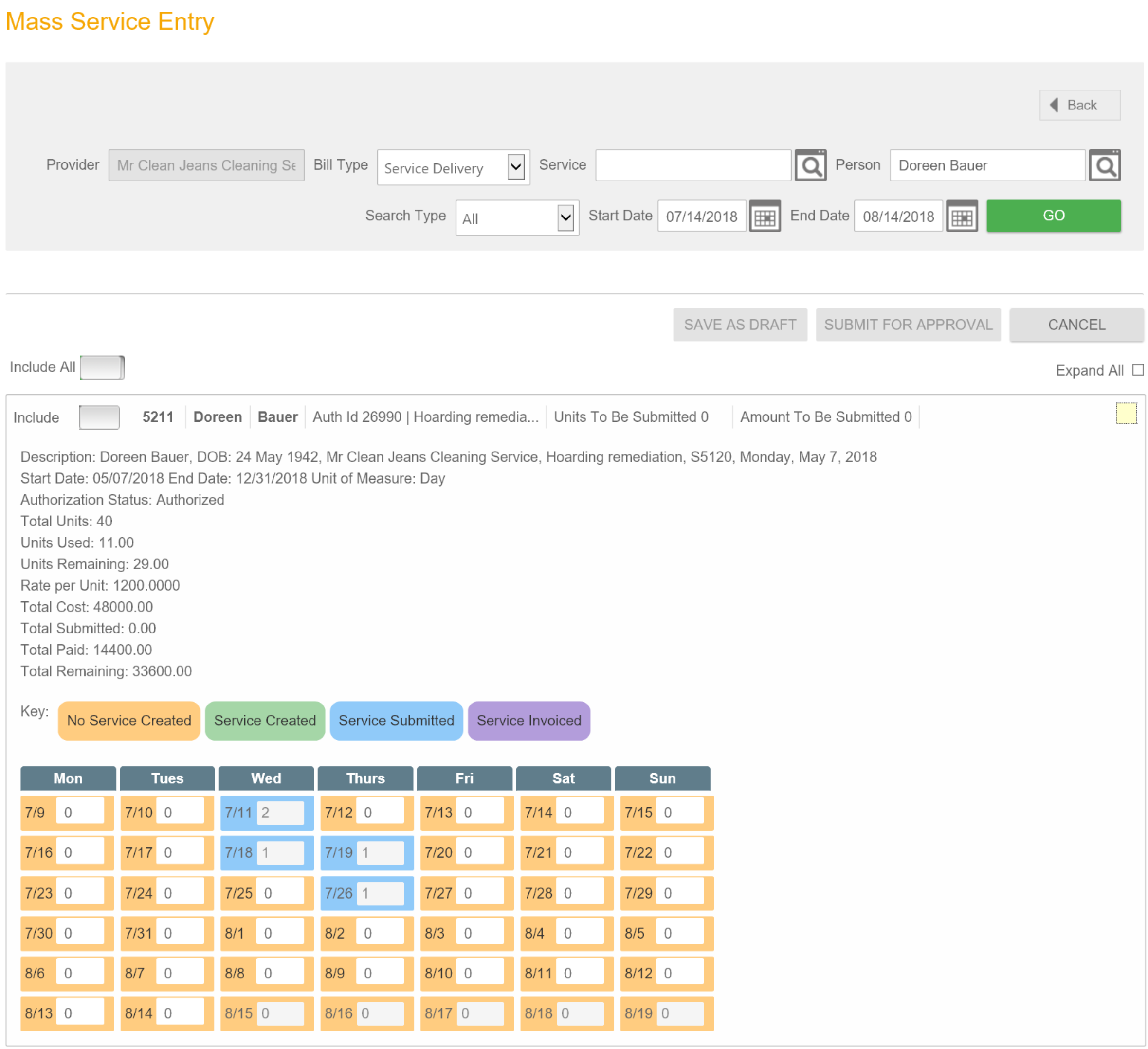
Within the calendar view you will see the following information:

- Units to be submitted on this bill
- Amount to be submitted on this bill
- Description of the Service Authorization – this includes:
    - The Person
    - Date of Birth
    - Provider
    - Service
    - HCPC
    - Start and End date of the service Authorization
    - Unit of Measure
- Total # of Unit on the authorization.
- Units used to date
- Units remaining on authorization
- Rate per unit
- Total Cost of the authorization
- Total amount submitted, but not processed yet
- Total amount paid
- Amount remaining on the authorization

You just enter the number of units delivered on each date. Once you have entered all units for the person you are able to see the total units to be submitted and amount to be submitted.

Once you have entered all of the billing information for a person, you will click on Include YES to submit the information for billing.

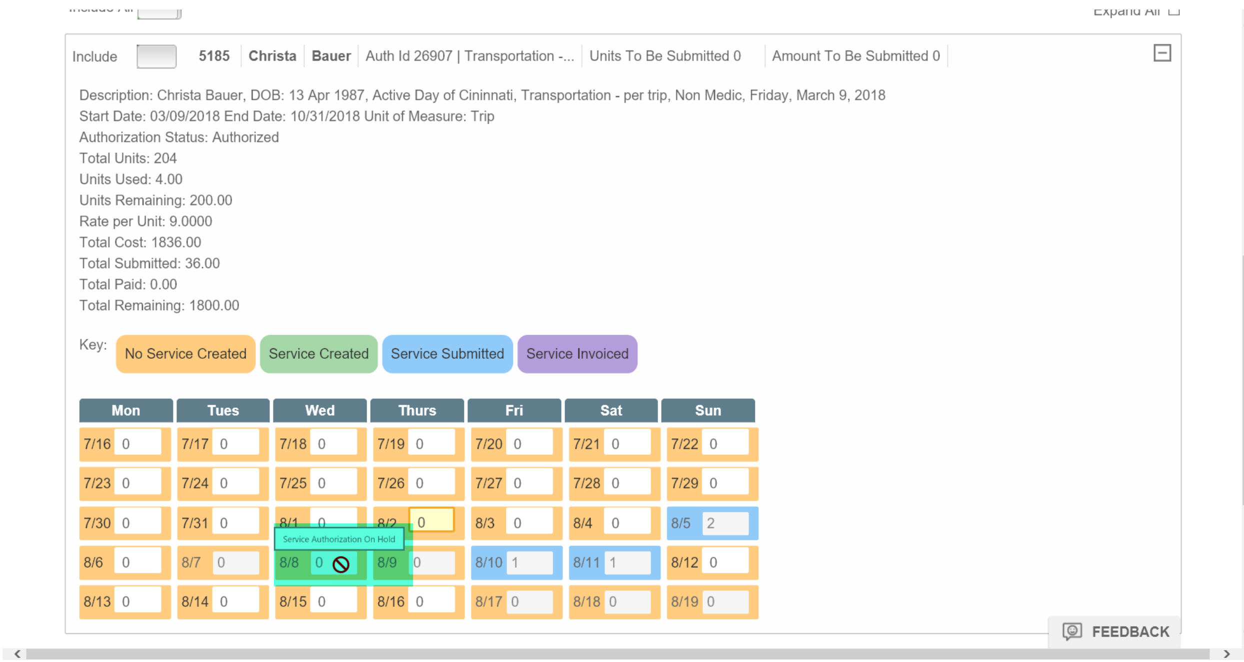
You can choose to "Save as Draft" this does NOT submit the billing for payment, but allows you to come back and continue adding information on a person. If you click on "Submit for Approval" all services marked as "Include: will be submitted to COA for payment. You are able to view the information submitted for billing in the **Provider Inquiry** window after COA creates the invoice.



The colored key code tells you where the services deliveries are in the payment process.

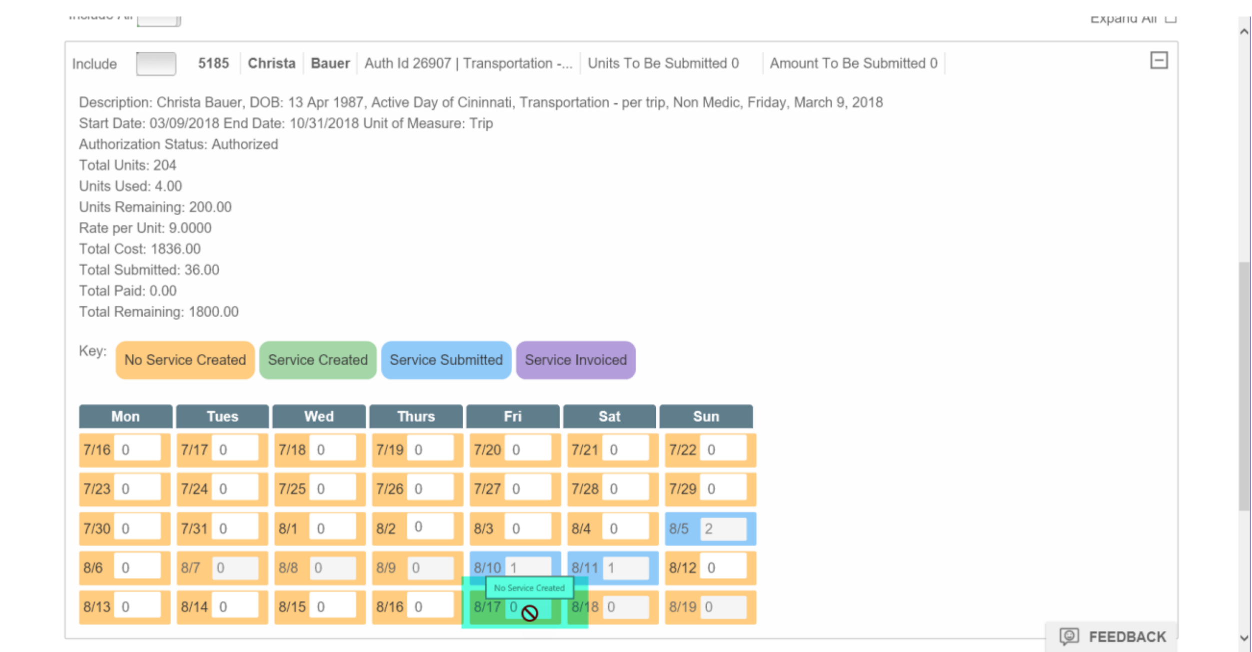
On – hold dates

You are not allowed to bill for dates the service authorization is “On Hold”, the date will be grayed out and if you hover over the date, a message will display stating that the “Service Authorization On-Hold”.



Dates outside the acceptable date range

If you attempt to bill for dates outside the acceptable date range, including dates over 72 days in the past or any dates in the future. The system will have those dates grayed out with a message stating that “No Service Created”.



Charge Adjustments

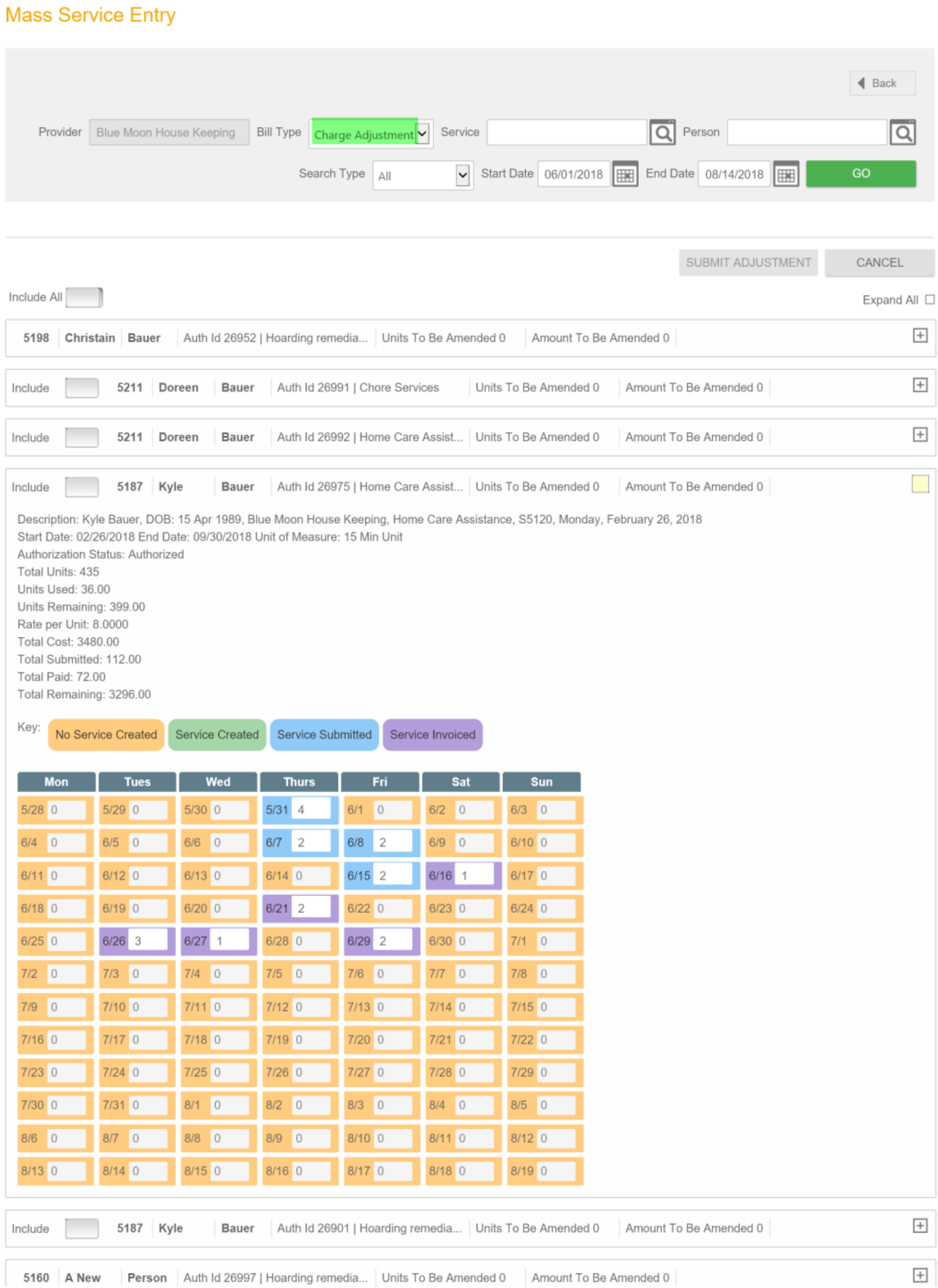
We know that errors happen and at times you will need to correct or adjust the billing you have submitted. You can make those adjustment in the Mass entry window as long as they fall with the allowable timespan set by COA, by changing the “Bill Type” to Charge Adjustment and selecting the person to be adjusted and clicking on “Go”.

Expand the Person.

Here are some examples of Charge Adjustments you may make and what you will need to do:

- You over billed units on a date.
    - Click into the date and enter the correct number of units. If the field is “purple” you may see a reduction in your next payment.
- You under billed on a date.
    - Click into the date and enter the correct number of units. If the field is “purple” you will see an addition in your next payment.
- You billed for the wrong date.
    - Click into the wrong date and put 0 in for the number of units and then enter the units in the correct date.
- You billed for the wrong person.
    - Open the file on the person incorrectly billed and enter 0 on each date that had units in them. Then open the correct person and enter the units on the dates services were delivered.

If you find that the correction is for dates no longer available to you, you will need to contact COA for instructions as to how to resolve the issue.



Billing submitted in an Excel Spreadsheet

If you choose to submit your billing in an Excel spreadsheet you MUST follow the specifications stated below:

- The file MUST be saved as a ".CSV"
- All columns must be included and in the following order:
  - **Client ID** – this can be found on the service authorization
  - **Provider Tax ID** – formatted as XX-XXXXXXX

- **Service Code** – this is the description of the service it must be exactly as displayed on the service authorization
- **Quantity** – number of units being billed.
- **Date of Service** – the date the services were delivered.
- **Cost per Unit** - the unit rate.
- **Client Last Name -** the last name of the person receiving the services.
- **Service Auth # -** the service authorization number

The file can be submitted using the attachment feature. If the file fails, you will receive a message thru portal messaging list the errors.

- We suggest a naming convention to identify each month of billing.

Billing submitted in an 837

You can choose to submit your billing information using the 837 format. The file extension MUST be ".dat". The file will be parsed according to all applicable Federal rules and MUST include the Service Authorization number, and appropriate HCPCs and modifiers – these are available on the service authorization. The file will match provider information from either a Federal Tax ID or NPI.

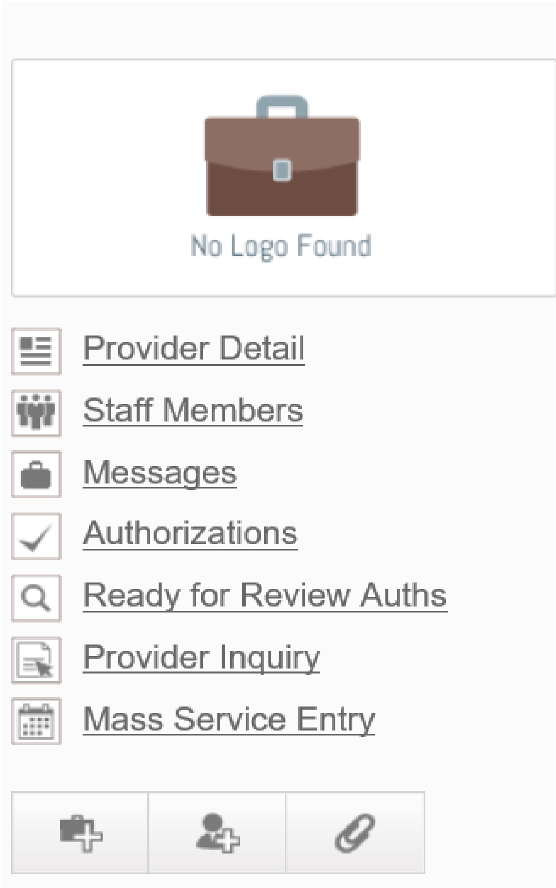
The file can be submitted using the attachment feature. If the file fails, you will receive a message thru portal messaging list the errors.

- We suggest a naming convention to identify each month of billing.

Attachments

You can use attachments to send requested information to COA. Attachments will also be used to submit files for billing if billing is submitted by an Excel spreadsheet or an 837.

To access Attachments you will click on the "Paperclip" icon located on the Provider Home page.



You will need to select the category for the type of attachment you are sending from the drop down list.

Once you select the category, click browse and select the file to be sent. Then click on Upload Attachment.

Attachments

Current Attachment(s)

Upload New Attachment

Select Category*

None

Select Attachment*

Browse...

UPLOAD ATTACHMENT

NOTES