

# Monthly Meeting Minutes- Existing Service Facilitator

<b>Meeting Details</b>	<b>Dates:</b> January 16, 2019 (10:00a-11:00a) January 21, 2019 (4:00p-5:00p) <b>Location:</b> Web based Meeting <b>Facilitator:</b> Consumer Direct Care Network
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## FARF Updates & Reminders

- A FARF is required for all new or transition enrollments
- Packets cannot be completed without a FARF
- Employer of Record changes also require a FARF
- Always use the most updated version which can be found on our website:  
[www.consumerdirectva.com/forms](http://www.consumerdirectva.com/forms)
- Completed & accurate FARF's are processed within 3 business days
- FARF does not automatically add clients to Service Facilitators Agency Web Portal

## Common FARF Errors

Incomplete Forms:

- Missing/incomplete information (SSN, Full Name)
- Reason for change not checked (New, Transition, EOR Change, SF Change)
- Incorrect Medicaid ID
- Incorrect eligibility information
- Client/EOR/Attendant packet being sent in prior to receiving FARF

Once filled out completely, the FARF needs to be submitted by email to [VAReferrals@ConsumerDirectCare.com](mailto:VAReferrals@ConsumerDirectCare.com) or fax at 1-877-571-8649.

**The VAReferrals@consumerdirectcare.com inbox is the email account dedicated specifically for these forms and is how CDCN prioritizes processing the FARFs.**

**Please note:** When submitting a FARF, please ensure that all information is filled out on the FARF completely and accurately to avoid a delay in processing.

## Packet Process Reminders

- Completed packets are processed within 5 business days
- Consumer packet is needed
- Missing Information: Packet cannot be processed

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- Packet Corrections: CDCN will notify EOR regarding corrections
- Consumer added to Service Facilitator Agency Portal after receipt of completed packet

## Time Submission

- Time for dates of service worked prior to January 4, 2020, can be submitted via the web portal to CDCN
- Attendants need to register for the Cell Trak Mobile Application or IVR and begin using it to submit time to CDCN
- IVR registration Forms need to be completed and sent to CDCN prior to attendants using the consumer landline phone to submit time

**Please note:** Service Facilitators can aid CDCN by encouraging attendants to register for the Mobile Application. Employers can register the client's landline phone today to ensure that those attendants, which do not have a smart device or tablet, have an alternative method to submit their shifts to CDCN. Employers can register for the web portal and use it to approve time.

## Cell Trak Updates

Based on user feedback, CDCN has made some updates to our EVV system.

- There is a new version of the app that will require users to update their Cell Trak application (version: 6.3.2.0)
- Multiple caregivers can now register one device. However, if the caregiver has multiple consumers at different addresses, this is not a suitable option. Caregivers should use their own individual device or submit time using the IVR system
- The mobile app user screens have been updated for a more user-friendly experience

## Cell Trak Interactive Voice Response (IVR)

To use the Cell Trak IVR system, the EOR will need to complete a form to register the consumer's landline phone number with CDCN. This form can be found on our website at [www.consumerdirectva.com](http://www.consumerdirectva.com), located under the forms tab. This option is available 24 hrs/day, 7 days a week for attendants to clock in and out.

## IVR Troubleshooting

The attendant may receive the following error messages when using the IVR system:

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- **Phone number isn't registered:** CDCN may not have received an EVV IVR registration form. The attendant may also receive this error if they have the caller ID blocked on the landline phone they are trying to call in on. If \*67 is being pressed prior to calling in, the attendant will need to stop doing this to submit time through the IVR.
- **PIN not correct:** The pin can be requested by calling 888.444.8182 or by email at [infocdva@consumerdirectcare.com](mailto:infocdva@consumerdirectcare.com). At this time, the pin can only be changed by CDCN.
- **Phone number not recognized:** Attendants can only call in on the registered IVR phone number to submit time. If the landline number has changed, the EOR will need to complete a new IVR registration form and submit to CDCN.

## **Consumer Direct Web Portal**

The Consumer Direct Web Portal can be accessed by visiting: [www.directmycare.com](http://www.directmycare.com). All attendants, EOR's, and Service Facilitators should register for the web portal. You now can translate the web portal into either English or Spanish.

The Consumer Direct Web Portal is a great resource for Service Facilitators. The web portal allows Service Facilitators to:

- Find participants
- View details
- View participant service activity
- View related reports
- Get overview of participant authorizations

**Please note:** It can take up to 5 business days to complete SF registrations on the portal.

## **Consumer Direct Web Portal Updates**

In addition to improvements made on the Cell Trak app, CDCN has also made some improvements to the web portal.

- New features on the web portal allow users to select exception reasons
- Improvements were made on how to approve time, including the addition of the two-week view
- Shift denial reasons are now listed on the Shift Summary Screen

## **Service Facilitator Participant Dashboard**

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For the Service Facilitator, everything starts with the **My Participant Dashboard**. When you select a participant, you can find out more about them, the employees who work with them, the employer of record, and spending/utilization reports.

Participants are grouped by agency, and the very **first thing you'll need to do is pick an agency**.

Once this is done, a list of participants in that agency appears in the dashboard. (If you are still not seeing results, your agency administrator needs to assign you a caseload.)

If you are the Agency Administrator for your agency, check to make sure the role you are registered under reflects the role of the Agency Administrator. Only the Agency Administrator can add clients to a Service Facilitators caseload to be able to view information.

If you are an Agency Administrator and are not able to view all the clients assigned to your agency, you can send an email to [infocdva@consumerdirectcare.com](mailto:infocdva@consumerdirectcare.com) or you can call our customer service center 888.444.8182 and someone will be able to assist you with getting your clients added to your agency web portal.

## **Agency Administrator Dashboard**

On the Agency Administrator web portal, Agency Administrators control which participants service facilitators and external case managers can see in the Portal by managing caseloads.

Agency Administrators can search for caseloads by name and sort columns with a filter to quickly find caseloads.

The Participants and Service Facilitators link open screens where Participants and Service Facilitators information can be found and reviewed.

## **Adding a Caseload**

Agency Administrators can assign clients to a Service Facilitators caseload for them to view the client's information. The step by step instruction guide on how to add caseloads can be found on our website [consumerdirectva.com](http://consumerdirectva.com) located under the training materials tab.

## **Service Facilitator Guides**

- **Service Facilitator Web Portal User Guide:** This guide provides a comprehensive overview of: My Participant Dashboard, Participant Details, Reports, Summaries, Authorizations, Shift Summary, Authorizations Dashboard, Patient Pay Report, Summary Report, Detail Report.

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- **Service Facilitator Agency Administrator Guide:** This guide provides a comprehensive overview of the items mention above, while also showing the ***Agency Administrator how to Add a Case Load, edit a Case Load and allows access to Service Facilitators within the agency.*** The Service Facilitators screen lists all service facilitators, the caseloads they belong to, and how many participants the SF can see in the Portal.

## **Consumer Direct Web Portal Update**

To comply with the EVV mandate and federal law, CDCN is required to capture the address information if a shift is performed somewhere outside of a participant’s home location or outside of the caregiver’s original starting location.

All CDVA Attendants will now be given the prompt shown on this slide for all shifts created in the web portal as well as any ***unfinished*** Cell Trak shifts.

Unfinished Cell Trak shifts are shifts where an EOR was not present to sign off on them at the end of the shift in the Cell Trak application.

If both first two questions (“Is your start location the same as the participant’s home address?” & “Is your end location the same as the start location?”) are answered “Yes”, caregivers will not be required to enter the “Start Address” – it will be greyed out and they can simply click “Submit” to continue. However, if either question is answered “No” (The first question has “No” selected by default), this prompt will require an address for the shift to be submitted.

Please note: There is now a 7<sup>th</sup> reason that can be selected when adjusting a shift in the web portal: Consumer/Attendant new enrollee (My enrollment documentation was not complete)

## **Consumer Direct Web Portal Shift Statuses**

A shift in the portal always has a status. There are nine possible statuses:

- **Approved:** The EOR has reviewed a shift submitted by the attendant and approved it for pay. Approved time can only be changed by CDCN.
- **In Progress:** CDCN has received time approved by the EOR and is preparing it for pay.
- **Ready to be paid:** Time has cleared both the EOR and CDCN processes. This time will be paid according to the current pay schedule.
- **Paid:** CDCN has issued a paycheck to the attendant for this shift.
- **Rejected:** The shift has been rejected by the EOR and returned to the attendant. The attendant may then change and resubmit the shift or delete it.
- **Saved:** The attendant has entered the shift on the portal but has no submitted it to the EOR for approval.
- **Submitted:** The attendant has submitted the shift to the EOR for approval.

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- Deleted: The attendant has deleted the shift. An attendant can only delete a shift that has not been approved by the EOR.
- Denied: The shift will not be paid by CDCN. The denial reason will be sent as a message found in the messaging envelope.

## Consumer Direct Web Portal Shift Denial Reasons

Here are a few reasons why shifts may be denied for attendants:

- Hours submitted over authorized amount: If time submitted by the attendant exceeds the amount the consumer is authorized, time for that shift will be denied.
- Overlapping shifts: If two or more attendants have submitted time that overlap during a shift, time will be denied.
- Shift already submitted: If the shift has already been submitted and paid, time will be denied.

## Shift Summary Report

Shift summaries are found by clicking the Shift Summary button in the top right corner of a Participant Detail Screen. This summary shows all services performed for a participant by Service, Date and Time. It starts with the shifts from the past 30 days, by any date range up to 30 days can be chosen.

## Authorizations & Agreements

Learn more about a participant's authorization(s). Clicking the Authorization button in the top right corner of a Participant Detail screen opens the **Authorizations Dashboard**. Click an authorization to open Agreement Details. This shows more information and an overview of unused units/funds by service code.

Authorizations are listed one by one. Each shows the participant's name, provider, and the date range of the authorization. Fields can be filtered to help find authorizations when there are many to choose from. **Tip:** *Filter the Status column to show only active authorizations.*

Once you click on the Authorizations ACN, you will be able to view details about the authorization. You will see the client's name, Agreement number, status, provider, the service start and end date.

The Service summary summarizes available units/funds.

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## Secure Emails

Consumer Direct uses a secure messaging system to send protected health information. On this slide is an example of what the secure email looks like when being sent from Consumer Direct Care Network.

You will click on the ‘open message’ button to open the email.

If this is your first time viewing a secure email from Consumer Direct Care Network, you will need to register. The secure email log in credentials are different than your CDCN web portal log in credentials.

After registering, you will be able to sign in and view the secure email. You can also respond back to the email securely.

Messages sent via a secure email from CDCN do expire after a certain period and the expiration date will be noted in your secure email.

Note: If you are expecting a secure email from someone at CDCN please check your spam/junk folder often as messages may end up there.

## Resources

All the information we have shown you can be located on our website at [consumerdirectva.com](http://consumerdirectva.com).

This is where you will go for forms including self-enrollment packets using DocuSign, our web portal link, training materials, the training schedule, contact information and more.

When navigating our website, some general things to help you are:

- the top of every page has tabs to help you quickly navigate to different areas.
- Clicking our logo will take you back to the homepage at any time.
- If you scroll down, our contact information is at the bottom of every page.
- If we scroll all the way back up, in the upper left-hand corner you have the option to translate our web page into many different languages.

The **About tab** has information about who we are and our brand.

The **Services tab** has information about the program we serve in VA.

The **Resources tab** is used to access various resources such as the web portal, training schedule, and training materials.

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The **Forms tab** is where you will go to access forms for this program. VPHP will have its own tab. This is where you will find our electronic self-enrollment packets using DocuSign, payroll calendar, forms for attendants to make changes and more.

The **Contact tab** is used to contact us directly from the website.

## Updated Factsheets

CDCN has released updated fact sheets which can be found on our website, [www.consumerdirectva.com](http://www.consumerdirectva.com) located under the training materials section. These factsheets are designed to be user friendly and to provide Caregivers and Employer of Records the tools and guides in submitting time to CDCN.

The fact sheets will address a variety of topics:

- Start and End a Shift
- IVR
- An Adjusted EVV Shift in the Web Portal
- Approve or Reject Time
- CDCN Payroll IVR

## Payroll Reminders

Consumer Direct Care Network wanted to remind Service Facilitators, EOR's and attendants that CDCN can begin paying attendants when the following steps have been completed:

1. The participant is approved to receive authorized services
2. The participant is eligible for Medicaid and Waiver Services
3. The Employer of Record Enrollment packet has been received by CDCN, all forms are complete, and a unique ID has been issued
4. The Attendant Enrollment packet has been received by CDCN and all forms are complete
5. CDCN has received a notarized SP-167 form with notary seal and DSS form if applicable

**Please note: If there are errors to any of the required forms, CDCN will contact the EOR & Attendant via email and or phone to let them know what changes need to be made.**

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## Attendant Pay Schedule

- a. Attendants are paid on the same bi-weekly schedule
- b. The two-week pay period runs from Thursday to Wednesday
- c. Time must be submitted by midnight on Friday and will be paid on the following pay date according to the pay calendar
- d. The pay 2020 calendar can be found on our website under the forms tab in the *Timesheet & Payroll Related Forms* section
- e. There are two sides to the payroll calendar:
  1. The first side looks like a traditional calendar. On the calendar, squares represent days when time is due. This means the EOR must approve submitted time on the web portal by this date. Circles represent pay dates and triangles show post office and bank holidays.
  2. The second side shows just the applicable dates.
    - a. Moving from left to right, the first two columns indicate the pay period start and end date, the middle column is when the time from that pay period must be submitted to Consumer Direct and the last column shows when the dates from that pay period will be paid.

## Enrollment Confirmation

CDCN will send out an Enrollment Confirmation letter to notify EOR's that we have received a completed packet, processed the background check, and that a worker can start receiving payments.

The letter will be sent within 5 business days from receipt of a completed packet.

The Enrollment Confirmation letter is sent to the Attendant via email as well as the EOR on file. This letter will outline the EOR and Attendant's CDCN ID number which are needed when registering through the mobile application in order process payment for Attendants.

## Timesheet Reminders

CDCN would like to remind all Service Facilitators that timesheets are no longer being accepted as of January 4, 2020. Please encourage your attendants to sign up for one of the approved EVV methods to avoid a delay in pay.

Attendants can submit time using the Cell Trak application or the Interactive Voice Response (IVR).

All attendants and EOR's should also register for the CDCN Web Portal.

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## **Patient Pay Report Now Available**

The Patient Participation deduction is an amount determined by the local Department of Social Services (DSS) that the participant may have to pay for the services he or she receives from the attendant. If the participant is subject to this deduction, the Patient Pay amount determined by DSS will be subtracted from the attendants pay and must be repaid by the Participant. To be reimbursed the attendant must show the Employer of Record a copy of his or her pay stub showing the Patient Pay deduction. The EOR is responsible for ensuring that the attendant is reimbursed for the full amount deducted from the attendants pay.

Patient Pay will be deducted from attendant's pay checks for pay periods that include the first day of each month. The Pay Schedule shows these pay periods circled. Please refer to the CDCN Payroll calendar for Patient Pay dates.

A Patient Pay Report is now available for Service Facilitators (SF), Agency Administrators (AA) and Managed Care Organizations (MCO) accounts.

This report will give the Service Facilitators, Agency Admins and MCO's the ability to view and manage their Participants information.

## **Authorized Representative & Signatory Authority**

The Employer of Record may choose to have someone help with their duties in the Virginia.

Consumer-Directed Services Program by electing to have an Authorized Representative & Signatory Authority.

This does not mean that the Employer of Record role will change if a Signatory Authority is used. A family member or friend can be in this role, however CDCN cannot release information to anyone, unless they are listed on this form, due to Health Insurance Portability and Accountability Act.

(HIPAA) requirements. Only submit this form if you are choosing someone to help you with Employer duties.

Signatory Authority Information: The person listed here may sign **timesheets only**, they cannot sign tax or hiring packets. An attendant cannot be a Signatory Authority signing off on their own timesheets.

## **W-2 Information**

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It's the end of 2019 and that means it's almost time to send out W-2 forms. The W-2 form is the form that an employer must send to an employee and the Internal Revenue Service (IRS) at the end of each year. The W-2 form is the official Wage and Tax Statement that reports an employee's annual wages and the amount of taxes withheld from their paycheck.

Consumer Direct Care Network will mail out W-2's to the address CDCN has on file as of December 20, 2019. W-2's will be mailed via regular USPS mail. Please encourage all your attendants to update their address with CDCN as soon as possible to avoid a delay in receiving their W-2.

CDCN has until January 31<sup>st</sup> to mail out the W-2's to attendants. Please also encourage attendants to log in to the web portal to access, view and print W-2's.

## **Consumer Direct Contact Information**

Email: [infoCDVA@consumerdirectcare.com](mailto:infoCDVA@consumerdirectcare.com)

Website: [www.ConsumerDirectVA.com](http://www.ConsumerDirectVA.com)

Phone: 888.444.8182

## **New Customer Center Hours**

To better serve you, CDCN has expanded its customer service center operating hours. Our new hours are:

Monday-Friday: 8 am – 7 pm, EST and Saturday: 9 am – 1 pm, EST

## **Consumer Direct Care Network Holiday Office Closure**

CDCN wanted to make everyone aware of the following office closure.

We will be closed on Monday, January 20, 2020 in observance of the Martin Luther King, Jr Day holiday. We will resume our normal business hours on Tuesday, January 21, 2020.

## **Cell Trak IVR Information**

Phone: 855.967.0581 (English)

Phone: 855.967.0582 (Spanish)

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The Cell Trak IVR is available 24 hours per day. Live support is available during CDCN customer service center operating hours: Monday-Friday, 8am-6pm, Eastern Standard Time. (EST)

To use this option, the participant will need to register their landline phone number with CDCN prior to the attendant being able to clock in or out on the landline phone.

The registration form can be found on our website at [www.consumerdirectva.com](http://www.consumerdirectva.com), located under the forms tab.

The default pin is 1234, unless a custom pin was set up.

The pin can be changed by calling CDCN at 888.444.8182 or by emailing [infocdva@consumerdirectcare.com](mailto:infocdva@consumerdirectcare.com)

## **Existing SF Presentation FAQ 1-2020**

### **1. How can consumers be added to a Service Facilitators web portal account?**

Once CDCN receives a FARF along with a completed EOR/consumer packet they will be added to the Service Facilitators web portal account. If you are still not showing the consumer in your portal, please email us at [infocdva@consumerdirectcare.com](mailto:infocdva@consumerdirectcare.com) or call us at 888.444.8182 to have the consumer added.

### **2. What happened to Service Facilitators having the ability to view consumer documents on the web portal?**

Our IT team is working to address this issue and hope to have a resolution to this soon.

### **3. Has the EVV 'Live' date been extended? Are paper timesheets still being accepted?**

EVV went live on January 4, 2020. Paper timesheets are no longer being accepted. Attendants must submit time using one of the two approved EVV methods which are: Cell Trak Mobile Application or Interactive Voice Response (IVR). Previous dates of service can be entered using the CDCN Web Portal.

### **4. Is this presentation available to Service Facilitators after the meeting today?**

A copy of the meeting minutes can be found on our website at [www.consumerdirectva.com/sfforms](http://www.consumerdirectva.com/sfforms)

### **5. What is the process of getting new clients added to our web portal account?**

Once CDCN receives a FARF and a completed EOR/Consumer packet, the client will then be added to the Service Facilitator Agency web portal.

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- 6. Does the EOR need to still approve time if they are approving time in the Mobile App each day?**

No, if the EOR has approved time for each day in the Mobile Application, they do not need to still approve time in the web portal.

- 7. Is the Enrollment Confirmation Letter only sent to the EOR and attendant?**

The Enrollment Confirmation is sent to both the EOR and attendant if an email address has been provided.

- 8. What information does the Enrollment Confirmation letter contain?**

The Enrollment Confirmation Letter contains basic information regarding Cell Trak. It also directs the EOR to review materials on our website for further EVV related material.