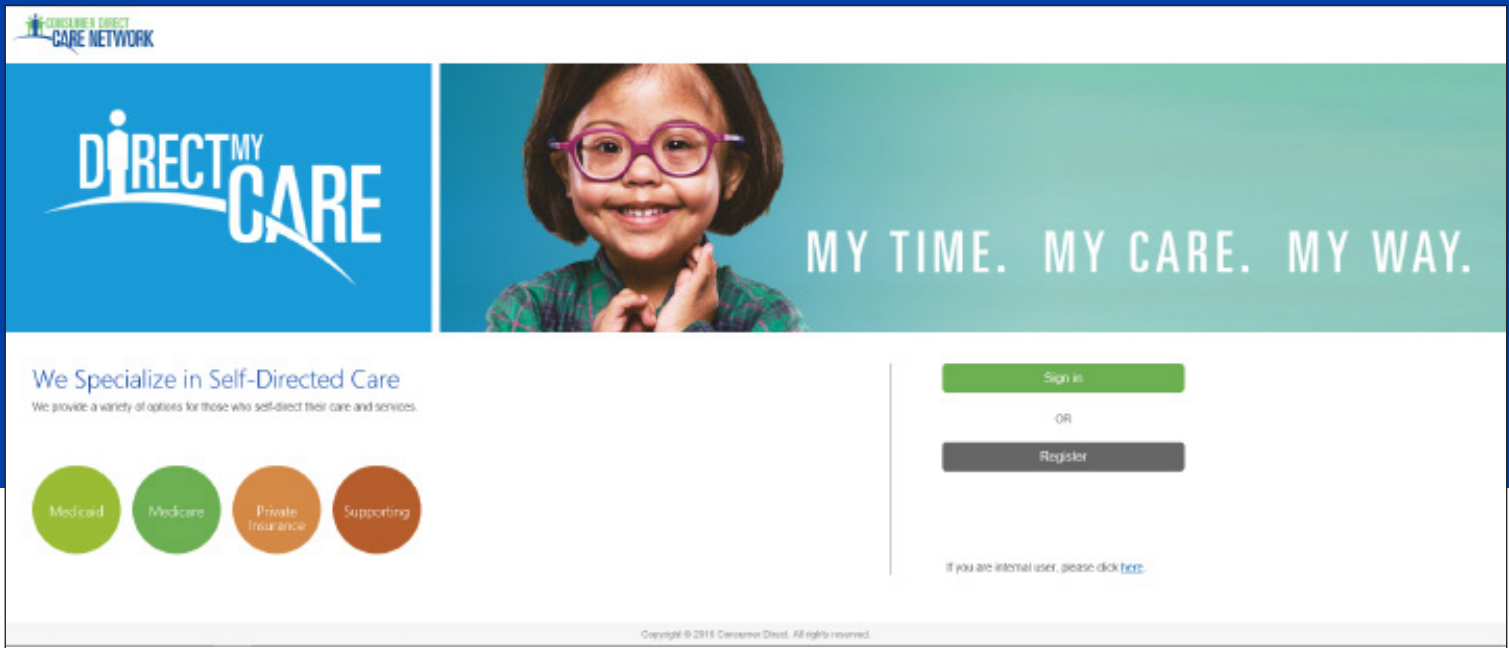


# WELCOME!



The Consumer Direct Care Network Portal, or CDCN Portal, allows Service Facilitators to see a participant's service activity and an overview of participant authorizations. They can see when services were performed and how funds/units have been used over time.

This guide shows service facilitators how to find participants, view their details, and view related reports.

If you have not yet registered with the CDCN Portal see the Web Portal Registration guide at <https://www.consumerdirectva.com/training-materials/>

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### Abbreviations used in this guide:

ECM, External Case Manager  
SF, Service Facilitator  
EOR, Employer of Record

### Terminology:

In the CDCN Portal, attendants are called "caregivers." An attendant is an employee of the employer of record.

# My Participant Dashboard

All information available to External Case Managers and Service Facilitators starts from a single dashboard once they have logged in to the portal. Note that in this guide we have protected our participants. Information such as address and social security number may be empty.

## My Participant Dashboard

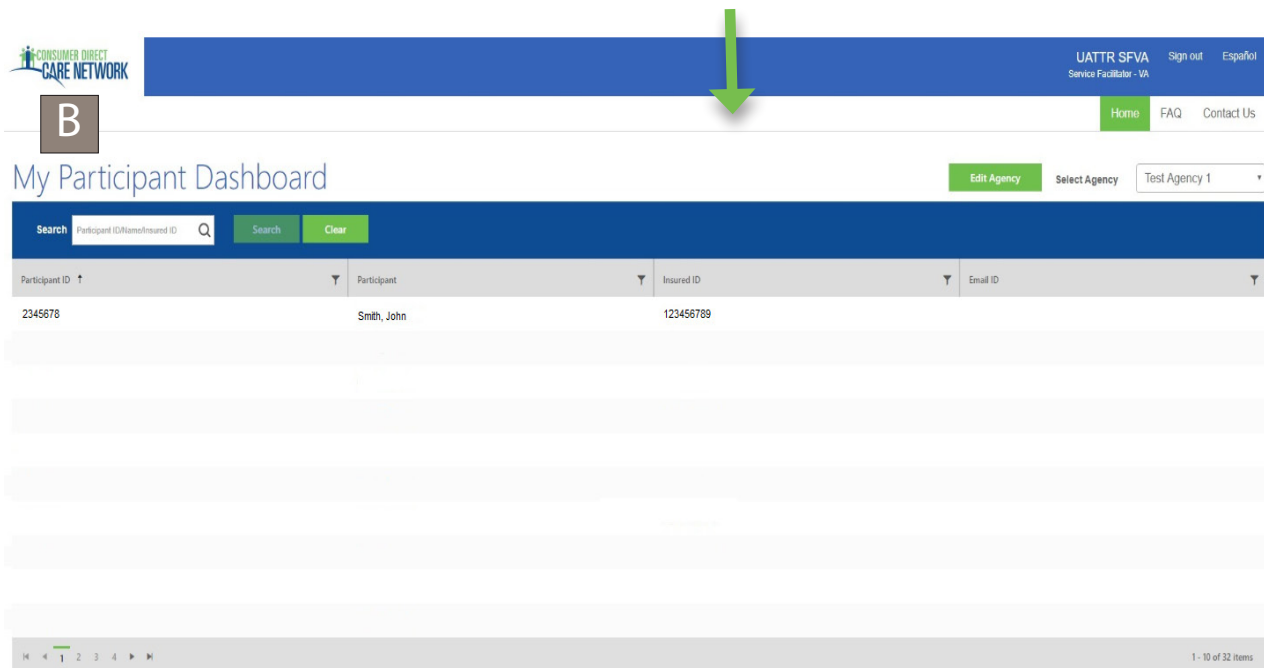
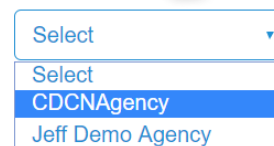
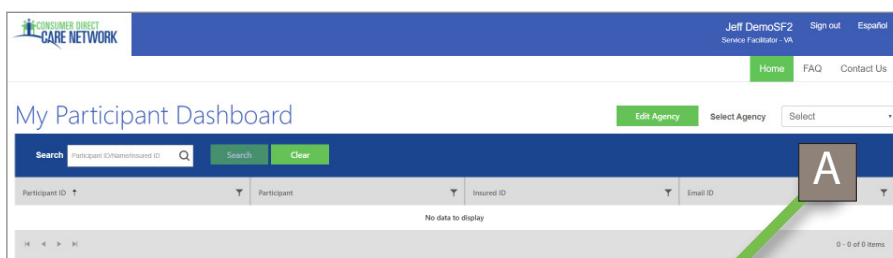
Everything starts with the My Participant Dashboard. When you select a participant you can find out more about them, the caregivers who work with them, the Employer of Record, and spending/utilization reports.

Participants are grouped by agency, and the very first thing you'll need to do is pick an agency<sup>(A)</sup>.

Once this is done, a list of participants in that agency appears in the dashboard<sup>(B)</sup>.

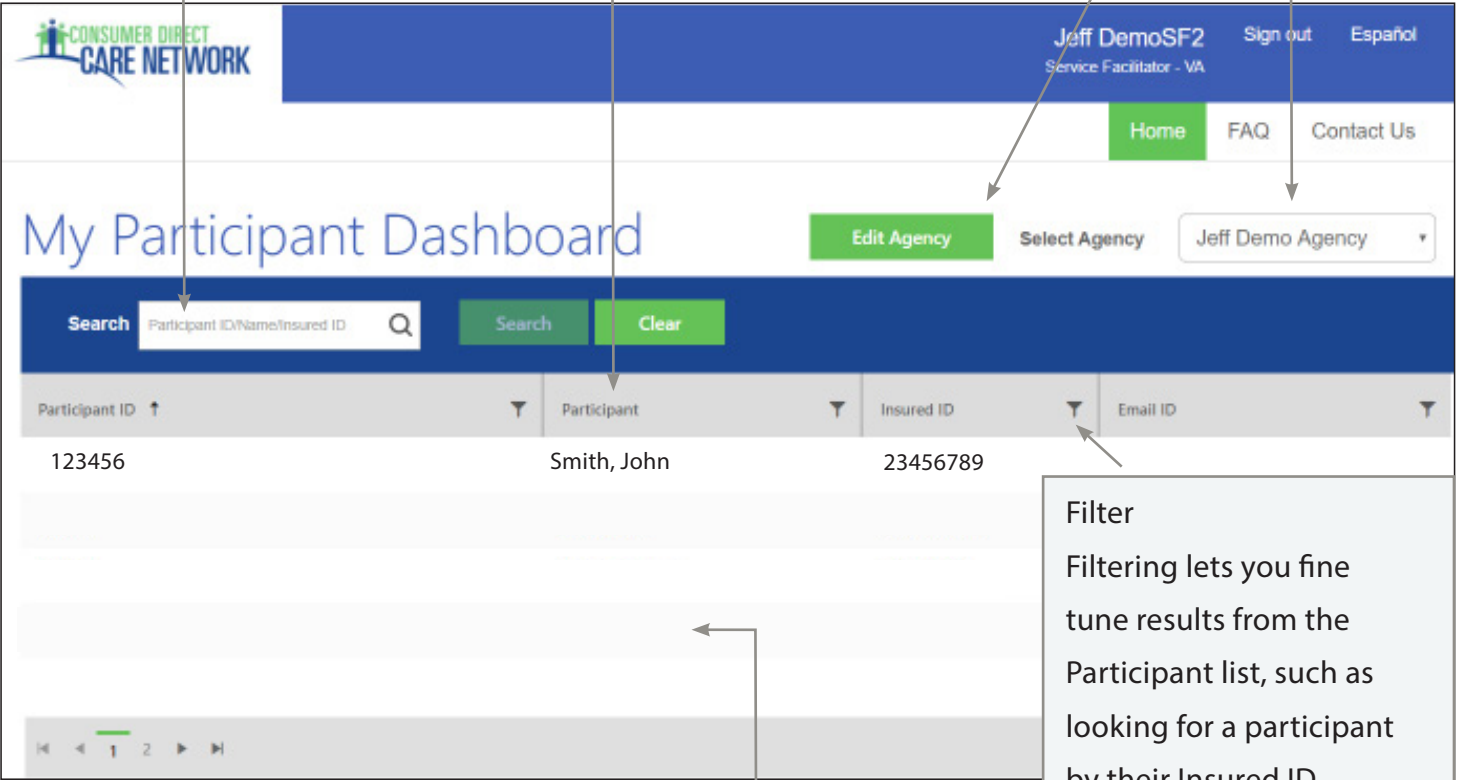
(If you are still not seeing results, your agency needs to assign you a caseload.)

On the next page is an overview of this dashboard.



# My Participant Dashboard, cont.

## My Participant Dashboard: Overview



**Search**  
Find a participant by name CDCN ID.

**Sort**  
You can sort any column by clicking its title.

**Change Agencies**  
Different agencies have different participants. Edit Agency changes the Select Agency drop down.

**Filter**  
Filtering lets you fine tune results from the Participant list, such as looking for a participant by their Insured ID (Medicaid ID).

**See More Results**  
Navigate back and forward through results here.

**View Participant Details**  
Click the participant's name to view their information.

The dashboard interface includes a top navigation bar with the CDCN logo, user information (Jeff DemoSF2, Service Facilitator - VA), and links for Sign out and Español. Below this is a secondary navigation bar with Home, FAQ, and Contact Us. The main content area is titled "My Participant Dashboard" and features an "Edit Agency" button, a "Select Agency" dropdown menu (currently showing "Jeff Demo Agency"), and a search bar. The search bar has a placeholder "Participant ID/Name/Insured ID" and buttons for "Search" and "Clear". Below the search bar is a table with columns: Participant ID (sorted ascending), Participant, Insured ID, and Email ID. The first row shows "123456", "Smith, John", and "23456789". At the bottom of the table is a pagination control showing "1" of "2" results. A "Filter" dialog box is shown in the bottom right corner, with a "Contains" dropdown, an input field, and "Clear" and "Filter" buttons.

# Participant Details

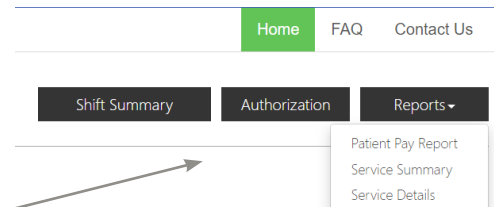
## Participant Details: Overview

Once a Participant is chosen from My Participant Dashboard, you'll see information about them, including Demographics and Contact Data. You will also see a list of caregivers and can open their shift details and rates of pay.

The upper right area of the window leads to key information like Authorizations, Reports, and Shift Summaries.

Home  
Start over.

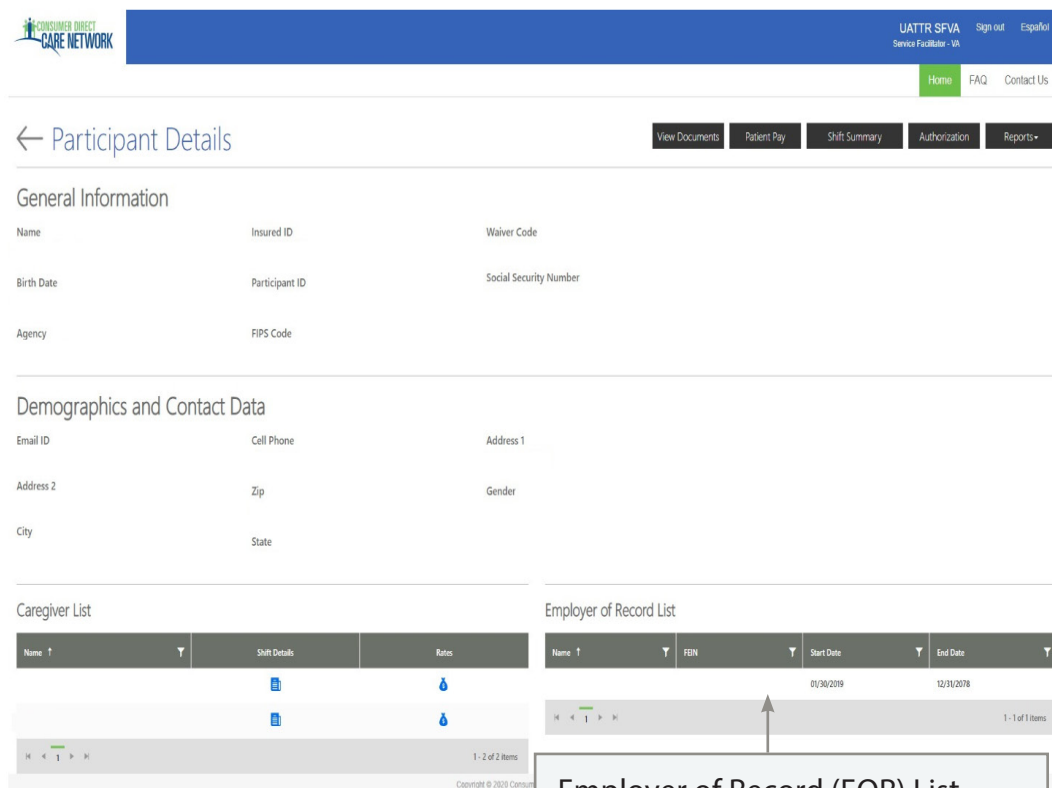
Links to Key  
Information  
Descriptions  
start on page 7.



General Information  
Such as name, CDCN  
ID, Birthdate, Insured  
ID.

Demographics  
Such as address,  
phone number, email  
address.

Caregiver List  
A list of Caregivers  
who perform services  
for the participant.  
Click their name  
to see details. Shift  
Details and Pay Rate  
are available  
(see page 5).



**Participant Details**

General Information

Name	Insured ID	Waiver Code
Birth Date	Participant ID	Social Security Number
Agency	FIPS Code	

Demographics and Contact Data

Email ID	Cell Phone	Address 1
Address 2	Zip	Gender
City	State	

Caregiver List

Name	Shift Details	Rates

Employer of Record List

Name	FEBN	Start Date	End Date
		01/30/2019	12/31/2018

Employer of Record (EOR) List  
A historical list of EORs known by  
Consumer Direct. Click their name  
for EOR details (page 6).

# Participant Details, Caregiver Info

## Information about Caregivers

At the bottom of each participant's detail page is a list of caregivers. Clicking their name shows information about the caregiver.

Table titled "Caregiver List" showing a list of caregivers with columns for Name, Shift Details, and Status. The table contains three rows of data, each with a caregiver name (A, C, B) and a status icon.

## Caregiver Details (A)

This includes details such as Hire Date, Date of Birth, and Address.

Form titled "Caregiver Details" showing fields for General Information (Name, Caregiver ID, Date of Birth, Social Security Number, Hire Date) and Demographics and Contact Data (Email ID, Cellphone, Address 1, Address 2, Zip, City, State).

## Caregiver Rate (B)

Shows the Caregiver's pay rates by Service Code.

Table titled "Customer Employee Rate" showing pay rates by Service Code. The table has columns for Service Code, Rate, Start Date, and End Date. It lists rates for Attendant, Companion, and Respite services.

## Shift Summary (C)

Shifts performed by the caregiver for the participant are listed one by one. Each includes the date and time of service. Change the date range to view past shifts (up to a 30-day span).

Table titled "Shift Summary" showing a list of shifts with columns for Caregiver Name, Caregiver ID, Service Code Description, Service Code, Time In, Time Out, Hours, Count Number, and Count Amount. The table contains five rows of data.

# Participant Details, Employer Info

## Information about Employers

At the bottom of each participant's detail page is a list of employers of record. Click the employer's name to see more information about them.


Employer of Record List

Name	FEIN	Start Date	End Date
01/01/2018	01/01/2018		

1 - 1 of 1 items

## Employer Details

Employer Details shows more about the employer, such as address, name, Employer ID and FEIN Number.



Jeff DemoSF2  
Service Facilitator - VA

Sign out
 [Español](#)

[Home](#)
[FAQ](#)
[Contact Us](#)

### ← Employer Details

#### General Information

Name

Caregiver ID

FEIN

Social Security Number

#### Demographics and Contact Data

Email ID

Cell Phone

Address 1

Address 2

ZIP

City

State

# Reports, Summaries, and Authorizations

This section covers information that can be found from the top right corner of the Participant Detail screen.

## Shift Summary:

Shows services performed for a participant by date and time. It starts with shifts from the past 30-days, but any date range up to 30-days can be chosen.

## Authorization

Lists all authorizations and agreements by service code. Displays units/funds available and utilized.

## Patient Pay Report

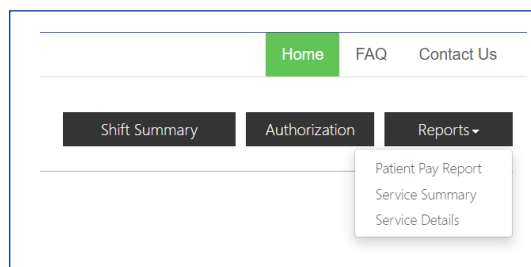
If the Participant is required to pay a portion of their care services, this report details how those funds are applied.

## Service Summary

An over view of each authorized service, units/funds used to date, and remaining units/funds available.

## Service Details

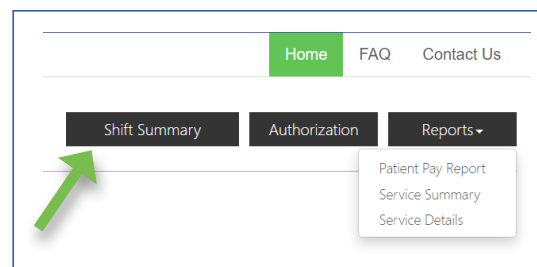
Lists services performed for the Participant in the past month. Includes Service Code, Date of Service, and pay details.



# Shift Summary

Shift Summaries are found by clicking the Shift Summary button in the top right corner of a Participant Detail screen. This opens a Shift Summary screen.

This summary shows all services performed for a participant by Service, Date, and Time. It starts with shifts from the past 30-days, but any date range up to 30-days can be chosen.



Back Arrow

Returns to the Participant Detail screen.

Search

Search for any date range up to 30 days at a time.

Filter

Fields can be filtered to find specific shifts.

Fields Includes Caregiver information, details about their service and pay.



← Shift Summary

Participant Name:

Start Date: 03/14/2020 End Date: 04/13/2020 Search Clear

Date	Time In	Time Out	Hours	Check Number	Check Amount	Paid Date	Status	Reason	Transaction ID
2020	11:30	19:30	8.0		\$0.00		Paid	N/A	TCN20200765HF000304
2020	07:45	17:45	10.0		\$0.00		Paid	N/A	TCN20200765HF015834
2020	07:00	17:00	10.0		\$0.00		Paid	N/A	TCN20200775HF014684
2020	07:30	17:15	9.75		\$0.00		Paid	N/A	TCN20200785HF014111

1 - 4 of 4 items

More info

Start Date: 03/14/2020 End Date: 04/13/2020 Search Clear

Date	Time In	Time Out	Hours	Check Number	Check Amount	Paid Date	Status	Reason	Transaction ID
2020	11:30	19:30	8.0		\$0.00		Paid	N/A	TCN20200765HF000304
2020	07:45	17:45	10.0		\$0.00		Paid	N/A	TCN20200765HF015834
2020	07:00	17:00	10.0		\$0.00		Paid	N/A	TCN20200775HF014684
2020	07:30	17:15	9.75		\$0.00		Paid	N/A	TCN20200785HF014111

1 - 4 of 4 items

Reason

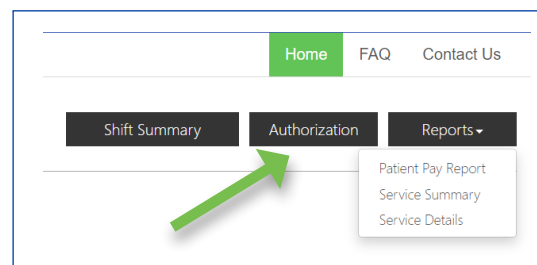
If time was denied in CDCN's system, the reason is listed here.



# 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.



Expand an Auth  
Click the arrow for more details about the Authorization.

View Auth Details  
Click the Auth's ACN to see details about the Authorization.

Service Summary  
Selecting a Service fills in the blue Service Summary bar. This summarizes available units/funds.

**Authorizations Dashboard**

Search: Client/Exchange/Agreement No. [ ] Start Date [MM/DD/YYYY] End Date [MM/DD/YYYY] [Search] [Clear]

>	ACN ↑	Agreement No. ↓	Client ID	Client Name	Insured ID	Date of Birth	Provider	Start Date	End Date	Status
▼	ACN2019239AUT000005							08/01/2019	12/31/2019	Active

Service Code	Start Date	End Date	Authorization no.	Status
Attendant (S5126)	08/01/2019	12/31/2019	test	Active
Attendant (S5126)	08/01/2019	12/31/2019	test	Active
Respite (S5150)	08/01/2019	12/31/2019	test	Active

1 - 2 of 2 items

Agreement Details

Authorization Summary

Client Name

Client ID

DOB

Provider

Program

Sub Account

Agreement No.

Diagnosis Code

Start Date

Status

External Case Manager

End Date

Back

Service Summary

Service

1010N

Service Amount

700000

Reserved Amount

Remaining Amount

700000

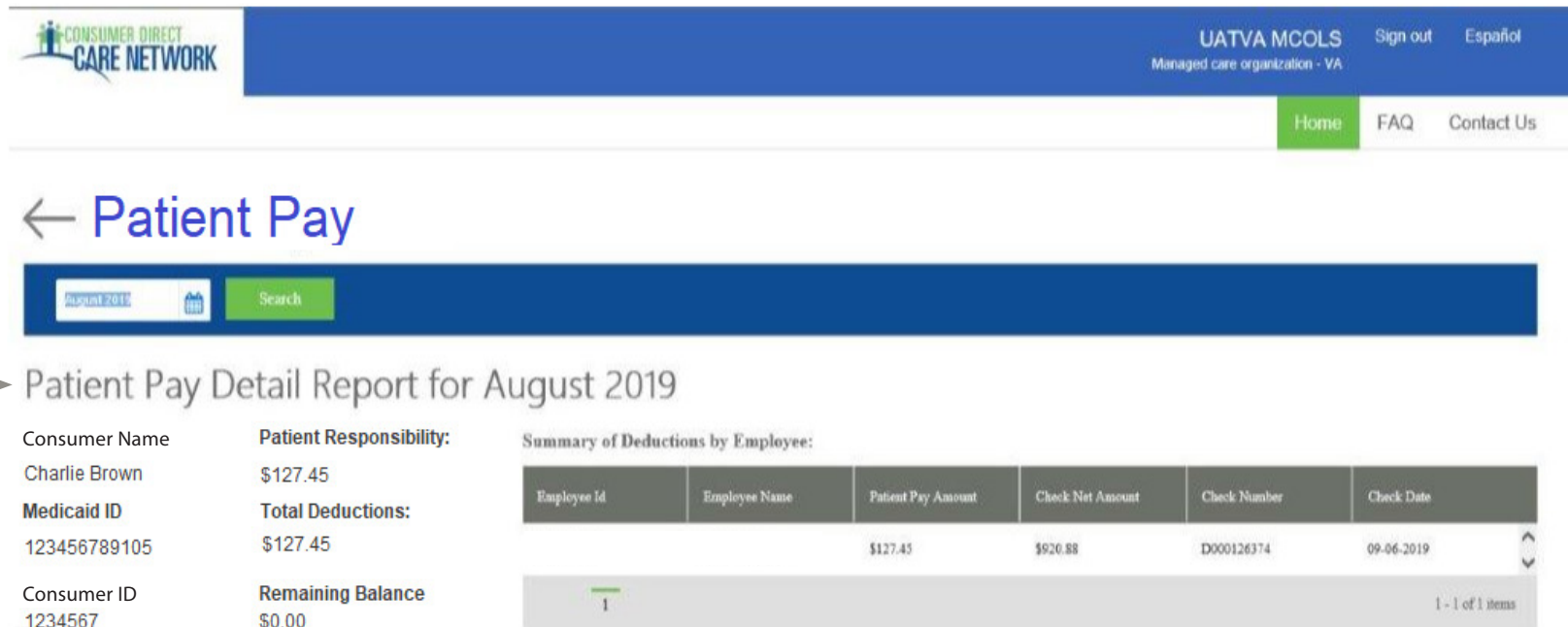
Spend Amount

Refresh

Service/Category	Description	Start Date	End Date	Authorization no.	Status	Hours	Bill Code	Bill Range	Range Code	Service Amount	Amount Range	Rate
10100	Attendant	08/01/2019	12/31/2019	test	Active	80000	100000	daily	101.076	daily	test	
10100	Attendant	08/01/2019	12/31/2019	test	Active	80000	00000	Daily	400.24	Daily	test	

# Patient Pay Report

For Participant's who pay for a portion of their services, the Patient Pay report will identify how much they are responsible for.



The screenshot shows the CDCN Patient Pay Report interface. At the top, there is a blue header with the CDCN logo on the left and user information on the right: "UATVA MCOLS Managed care organization - VA", "Sign out", and "Español". Below the header is a navigation bar with "Home", "FAQ", and "Contact Us" links. The main content area is titled "Patient Pay" with a back arrow. Below the title is a search bar with a date selector set to "August 2019" and a "Search" button. The report title "Patient Pay Detail Report for August 2019" is displayed. The report content is divided into three sections: Consumer Information, Patient Responsibility, and Summary of Deductions by Employee.

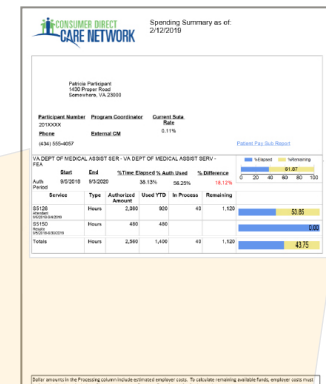
Consumer Name	Patient Responsibility:	Summary of Deductions by Employee:					
Charlie Brown	\$127.45	Employee Id	Employee Name	Patient Pay Amount	Check Net Amount	Check Number	Check Date
<b>Medicaid ID</b> 123456789105	<b>Total Deductions:</b> \$127.45			\$127.45	\$926.88	D000126374	09-06-2019
<b>Consumer ID</b> 1234567	<b>Remaining Balance</b> \$0.00	<div>1</div> <div>1 - 1 of 1 items</div>					

Patient Responsibility is the amount the participant is responsible to pay the Caregiver for the month listed. This amount is deducted from the caregiver's pay prior to Consumer Direct making payment.

# Summary Report

A Participant's Summary Report shows each service within an authorization, the amount of services used to date, and remaining funds/units within each service. Values are provided in units/funds as well as percentages.

**% Time Elapsed**  
How much of the authorization period has passed as a percentage. 50% means half-way through the Authorization.



Participant Number	Program Coordinator	Current Sub Rate
201XXXX	External CM	0.11%
Phone		
(434) 555-4057		
Patient Pay Sub Report		
VA DEPT OF MEDICAL ASSIST SER - VA DEPT OF MEDICAL ASSIST SERV - FEA		
	Start	End
Auth Period	9/5/2018	9/3/2020
	%Time Elapsed	% Auth Used
	38.13%	56.25%
		% Difference
		18.12%
Service	Type	Authorized Amount
85126 Attendant 9/5/20 10-9/30/2019	Hours	2,000
85150 Respite 9/5/20 10-9/30/2019	Hours	400
Totals	Hours	2,500
		Used YTD
		920
		In Process
		40
		Remaining
		1,120
		% Elapsed
		53.85
		% Remaining
		0.00
		Totals
		43.75

Services are listed one by one.

**Authorized Amount/Used YTD**  
The total funds/units in the authorization and the amount used during the Auth Period.

**In Process Committed**  
funds not yet paid.

**Graph**  
A quick way to view the Authorization at a glance.

# Detail Report

The Detail report lists each service performed for a participant in the past 30-days. To keep a running list of services, download it regularly.

