

# Monthly Meeting Minutes- Existing Service Facilitator

<b>Meeting Details</b>	<b>Dates:</b> July 16, 2020 (10:00a-11:00a) July 21, 2020 (4:00p-5:00p) <b>Location:</b> Web based Meeting <b>Facilitator:</b> Consumer Direct Care Network <b>Participants:</b> 32 attended on 7/16/20 15 attended on 7/21/20
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## FARF Updates & Reminders

- 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
- A FARF will be used to submit EOR changes. If there is no FARF on file, CDCN will contact the Service Facilitators to request the FARF to process the New Employer Enrollment Packets.

## 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

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

## DocuSign FARF

The DocuSign FARF is now available. This will be the preferred method to submit FARFS to CDCN. Many of the errors mentioned on the previous slide can be prevented with the submission of the DocuSign FARF. SFs can find the DocuSign FARF on our website in the Forms tab, under the Electronic Fiscal Agent Request Form.

There are many benefits of submitting FARFs electronically. Some of the benefits include:

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- This will assist Service Facilitators and CDCN with ensuring that the FARF is accurately completed.
- It will help organize and store documents and other materials by significantly reducing the amount of paperwork.
- Also, if changes are made to the FARF, SF don't need to download a new form or worry about using the wrong version.

We will have the DocuSign FARF user guide available to assist with the completion of the FARF. Please utilize this document when completing the FARF.

## **Has my FARF been Received?**

One of the most common questions we receive during FARF submission is, has my FARF been received?

If the FARF was completed via DocuSign, a confirmation email will be sent once the FARF has been reviewed by the team and processed. If the FARF has an error and needs a correction, or has an update regarding eligibility, the FARF team will download the FARF via PDF from

DocuSign and submit back to the SF's email address with the information needed.

If the FARF was completed by paper and submitted by email or fax, our FARF team will send a follow up email with the status. This email will inform of any corrections, updates, eligibility inquiries, or if it was successfully processed.

To summarize, if the DocuSign or paper FARF has been received by the CDCN team, the SF will receive an email with confirmation of processing, corrections needed, or updates.

## **Packet Process Reminders**

- Completed packets are processed within 5 business days
- Consumer packet is needed in order to be able to process the Attendant packet
- Missing Information: Packet cannot be processed
- Packet Corrections: CDCN will notify EOR regarding corrections
- Consumer added to Service Facilitator Agency Portal after receipt of completed packet
  - The EOR will be notified by email if an email address is on file. If no email address is present, then CDCN contacts the EOR by phone. If they cannot be reached, a voicemail is left.

## **New Enrollment Packets- Attendants**

On this slide, is some important information regarding the Attendant packets.

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The Attendant packets now have a more detailed instruction packet to assist with entire completion of the packet. Please encourage all EORs and Attendants to utilize this document to ensure completion of the entire packet. This will result in faster processing due to minimized errors. The instructions have been increased from 6 to 17 pages, as it includes highlighted mandatory fields for each page in the packet as an example for Attendants to reference.

CDCN has also removed and replaced 2 forms in the Attendant packet. The Attendants will no longer submit the Employee-Employer Relationship Disclosure form and the Attendant Attestation Form. These 2 forms have now been replaced by the Payroll Tax Exemptions Determination form, and the Employment Agreement form. These replacement forms are updated and shorter in length.

As mentioned previously, instructions for assisting with completing these forms are available on our website under the Forms tab.

## **New Enrollment Packets- EOR**

The Employer of Record packet has also been updated for ease of use. EORs can reference the Employer packet instructions for a step by step guide on completing the enrollment packet, which includes sample pages with highlighted mandatory fields. This Instruction packet is only 6 pages long.

## **Updated Forms**

CDCN has updated the Designated Representative for Attendant Time Approval, and the Authorized Representative Agreement. Previously, these 2 forms were combined. They have now been separated and updated for clarification.

The Designated Representative for Attendant Time Approval is chosen by the EOR. This person can be a family member, friend, or other trusted individual who can only approve attendant time records. The EOR's role will remain unchanged. The person in this role cannot approve time for themselves if they are an Attendant. They also are unable to sign any documents on behalf of the EOR.

The Authorized Representative on the other hand, has a different role. They are also chosen by the EOR and can be a family member or friend in this role. This person can only help the EOR with Employer duties. They have permission to speak to CDCN on behalf of the EOR but they are not authorized to sign any forms or paperwork.

These two forms can be found in the Forms tab, located under "Payroll, exemptions and other forms" in the "other" section.

## **Cell Trak Interactive Voice Response (IVR)**

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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.

If the Attendant is receiving any error codes or is unable to clock in, then the IVR registration is not complete. The EOR must submit the IVR Registration form to be able to use the IVR system.

## 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

Internet Explorer is best and provides the best experience. Chrome can be used as an alternative web browser choice. Mobile devices may also be used; however, connection speeds may make using the portal difficult. Wi-Fi connections seem to be the most reliable.

If you have not yet registered with the CDCN Portal see the Web Portal Registration guide at [www.consumerdirectva.com/training-materials/](http://www.consumerdirectva.com/training-materials/)

If you have already registered for the web portal your profile will be activated once we have received the confidentiality agreement and we have established your agency account in our system.

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

## Service Facilitator Participant Dashboard

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**.

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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 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.
- **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.

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## **Consumer Direct Web Portal Update**

In order to submit a shift on the web portal, all Attendants must follow and complete the prompt shown on this slide. This will also be required for any unfinished CellTrak shifts. Unfinished Cell Trak shifts are shifts where an EOR/participant was not present to sign off on them at the end of the shift in the CellTrak 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.
- 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 not submitted it to the EOR for approval.
- Submitted: The attendant has submitted the shift to the EOR for approval.
- 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:

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- 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.*

## 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.

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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.

## CDCN Website

All of 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.

Our website has been updated to become more user friendly with easier navigation, updated training materials, and improved forms organization. We have reduced the number of clicks it takes to access the pages you use regularly. There are new videos and new Fact Sheets in the training materials, as well as a more accessible Training Materials tab. The new Step by step Fact sheets include Attendant: Resubmit or Delete a Shift, Time Entry Exceptions, Paystubs and Documents, and for the EOR: Reports and Documents. We have also added new user-friendly information in our forms section to help you determine which forms should be accessed.

## 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.**

Attendants no longer receive paper paystubs in the mail. Attendants can access their paystubs on their Web Portal homepage by clicking the "Paystub Repots" button. Here they will find their Paystub History with detailed Reports.

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## Attendant Pay Schedule

- Attendants are paid on the same bi-weekly schedule
- The two-week pay period runs from Thursday to Wednesday
- Time must be submitted by midnight on Friday and will be paid on the following pay date according to the pay calendar. Again please note, Time **must** be submitted and approved by the EOR by midnight on Friday in order to be paid the following pay day.
- The pay 2020 calendar can be found on our website under the forms tab in the *Timesheet & Payroll Related Forms* section
- There are two sides to the payroll calendar:
  - 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.
  - The second side shows just the applicable dates.
  - 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 Employers that we have received a completed packet, processed the Background Check, and that a worker can **start submitting their time**. An attendant can submit time and be paid for up to 30 days pending their criminal history background results.

This 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 Employer on file. This letter will outline the Employer and Attendant's CDCN ID numbers, the EOR and Client information, and the Attendant's pay rate.

Celltrak for EVV and Web Portal information is also provided in the Enrollment Confirmation, as well as Additional Resource information such as the CDCN Payroll Calendar and Registration instructions found on our website at [www. Consumerdirectva.com](http://www.Consumerdirectva.com)

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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) and Agency Administrators (AA) accounts.

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

## COVID-19 Temporary Attendants

In response to COVID-19, parents and spouses have been temporarily approved to be attendants for minors as of April 20, 2020.

CDCN has created special enrollment packets specifically for parents or spouses. These enrollment packets can be found under our Forms tab in the "COVID-19: Temporary Attendant Forms" section.

For this temporary process, Time can only be entered via the Web Portal within 14 days of service. CellTrak and IVR cannot be utilized.

Attendant Code S5126 can only be submitted. Any Respite or Companion Care submissions will be denied.

All temporary Attendants, being the parents and spouses of the Participant, should select **my Participant had an emergency** as the exception reason when submitting time on the Consumer Direct Care Network web portal.

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The current Employer of Record (EOR) cannot be a paid Attendant. If there needs to be an EOR change, the Service Facilitator will need to submit a Fiscal Agent Request Form (FARF) and the EOR and Attendant will need to submit the required enrollment forms.

CDCN has created a FAQ for this COVID-19 response. Please review and utilize this document for assistance with any qualifying Participants. This FAQ document can be found under our Forms tab in the “COVID-19: Temporary Attendant Forms” section

## **Consumer Direct Contact Information**

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

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

Phone: 888.444.8182

### **Our customer service center operating hours are:**

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

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## Existing SF Presentation FAQ 07-2020

***What exception reason in the Portal should the Attendant select when the EOR is not available to sign off on the CellTrak app?***

Currently we have several reason codes. The attendants should use the reason code that best describes their situation. The current reasons are: I clocked in/out at the wrong time, My phone or tablet was not working, My member had an emergency, I forgot to clock in/clock out, I didn't have a phone or tablet, The App is not working, and My enrollment documentation was not complete.

***Can attendants enter time and save in portal while waiting for an active authorization in system?***

The Attendant will not be able to enter time in the Portal or CellTrak if there is no current authorization. They will need to enter their time in the Portal later once the authorization is approved and in CDCN's system.

***If Attendants submit time on portal, is it still EVV compliant?***

Any time submitted on the Portal is not compliant with EVV.

***What are the approved EVV apps attendants can use to enter time?***

CellTrak is used by CDCN for EVV.

***Are the old forms for authorized representative still able to be used or should we encourage family to use the two new separated forms?***

If an EOR or Participant has previously submitted the Authorized Representative form and Designated Representative form, then a new submission with the updated forms is not required. The old forms are no longer on our website. Please encourage your families to only use the new forms going forward.

***Is your "Contact us" link on the web site HIPPA compliant with confidentiality?***

The "Contact Us" link on our website is secured with our zsecure system.

***What forms are required for existing attendants when the EOR changes?***

The attendant should complete an EOR Change Attendant Attestation form which can be found in the "Change of EOR" section of the Forms tab.

***Is it still EVV compliant if attendant clocks in and out on app but does not sign so then has to go into the portal and submit the times?***

No, any time submitted on the Portal is not compliant with EVV.

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***Is there an end date for the temp Attendants (parents) will have to stop working?***

Yes. The end date for the COVID-19 response is 8/31/2020.

***Are you saying the SF is responsible to add all new consumers into the portal?***

The Agency Admin will assign all Clients to the Service Facilitator's caseloads. Please contact us at [infoCDVA@consumerdirectcare.com](mailto:infoCDVA@consumerdirectcare.com) if any Participants are missing from your Agency's Web Portal. For assistance with adding Participants to the SF's caseloads, please refer to our Agency Admin User Guide located on our website under the "Training Materials" tab.

***How do you submit time for shifts further back than 14 days through the Portal for the Temporary Attendants if they are awaiting their Background check results?***

Once the Temporary Attendants are approved and completely enrolled with CDCN, they must submit their time on the Web Portal within 14 days of service. They will be able to submit the retro time prior to 14 days if their enrollment paperwork is still being processed.

***How many days after a FARF is submitted before EOR and attendants can use electronic enrollment?***

FARFs are processed within 3 business days. Once you receive an update on the FARF progress, you can advise the EOR and Attendants to submit their enrollment materials.

***Should the EOR and the SF's Web Portal screens look the same?***

The SF and EOR Web Portal screens vary. Please advise the EOR to visit our training materials <https://www.consumerdirectva.com/training-materials/>