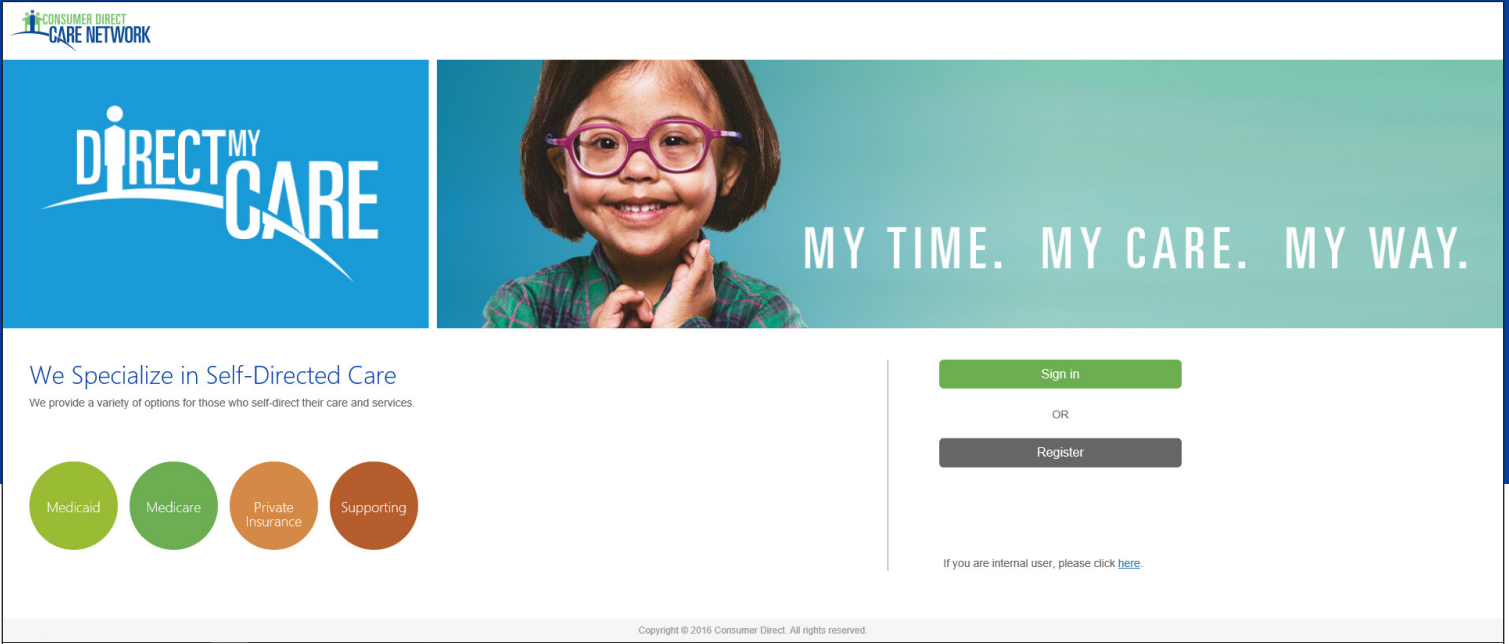


# WELCOME!



The screenshot shows the CDCN Portal homepage. At the top left is the 'CONSUMER DIRECT CARE NETWORK' logo. Below it is a large banner with the 'DIRECT MY CARE' logo on the left and a photo of a smiling young girl with glasses on the right. To the right of the girl is the text 'MY TIME. MY CARE. MY WAY.' Below the banner, on the left, is the text 'We Specialize in Self-Directed Care' followed by a subtext 'We provide a variety of options for those who self-direct their care and services.' Below this are four colored circles labeled 'Medicaid', 'Medicare', 'Private Insurance', and 'Supporting'. On the right side of the banner area are two buttons: a green 'Sign in' button and a grey 'Register' button, with 'OR' in between. Below the buttons is a link: 'If you are internal user, please click [here](#).' At the bottom of the page is a small copyright notice: 'Copyright © 2016 Consumer Direct. All rights reserved.'

The Consumer Direct Care Network Portal, or CDCN Portal, has a number of tools for MCOs, including:

- access to authorizations and agreements
- consumer information and service activity
- pay rates and utilization

They can see when services were performed and how funds/units have been used over time.

This guide shows MCOs how to find authorizations & 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/>

## Contents

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## Terminology:

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

# Authorizations Dashboard

MCO users see an Authorizations Dashboard upon signing in to the CDCN Portal. This way Authorizations can be found quickly and reviewed. Users can also jump to a Participant Dashboard when looking for more detail on a consumer's activity, service utilization, attendants and employers of record (EOR).

## Authorization Dashboard: Overview

### Search

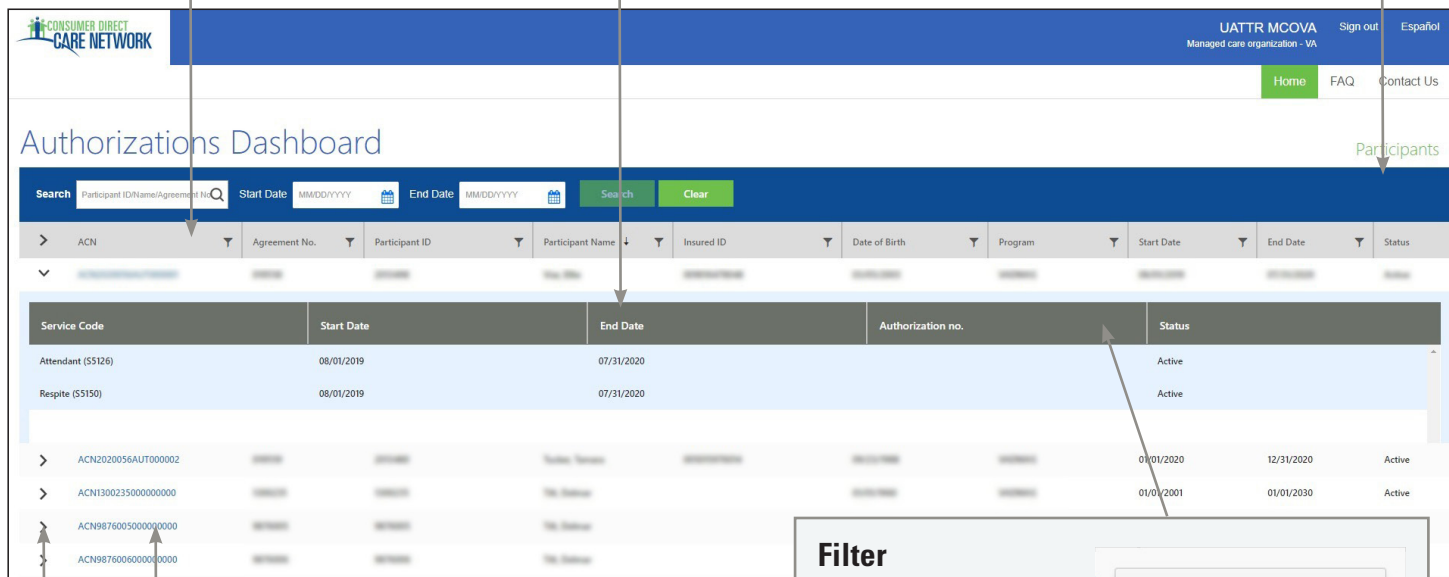
Find an Authorization by participant name, ACN, Insured ID (Medicaid ID).

### Sort

You can sort any column by clicking its title.

### Participants

Opens the My Participant Dashboard. Here you will find details about participants, their caregivers and EORS (see page 4).



The screenshot shows the Authorizations Dashboard interface. At the top, there is a navigation bar with the CDCN logo, user information (UATTR MCOVA, Managed care organization - VA), and links for Sign out, Español, Home, FAQ, and Contact Us. Below the navigation bar is the 'Authorizations Dashboard' title. A search bar is located at the top left of the dashboard, with fields for Participant ID/Name/Agreement No., Start Date, and End Date, along with Search and Clear buttons. A table of authorizations is displayed below the search bar, with columns for ACN, Agreement No., Participant ID, Participant Name, Insured ID, Date of Birth, Program, Start Date, End Date, and Status. A 'Participants' link is visible on the right side of the dashboard.

### Expand

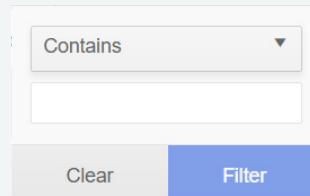
Shows services in an authorization (see next page).

### Open Authorization

Click the ACN for a more detailed look at the authorization and agreement (see next page).

### Filter

Filtering lets you fine tune results from the Participant list, such as looking for authorizations by start or end date.



The filter widget consists of a dropdown menu with 'Contains' selected, a text input field, and two buttons: 'Clear' and 'Filter'.

Next page, more about the authorizations dashboard

# Authorizations Dashboard, cont.

## Authorizations Dashboard and Agreement Details

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.

### 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 ID/Name/Agreement No.  Start Date:  End Date:

>	ACN	Agreement No.	Client ID	Client Name	Insured ID	Date of Birth	Provider	Start Date	End Date	Status
▼	ACN2019239AUT000005	998681		James, Catherine	123456789	08/01/1987	123456789	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 Catherine, James	Client ID 123456789	DOB 08/01/1987
Provider 123456789	Program 123456789	Sub Account 123456789
Agreement No. 123456789	Diagnosis Code 123456789	Start Date 08/01/2019
Status Active	External Case Manager	End Date 12/31/2019

Service Summary

Service	Service Amount	Reserved Amount	Remaining Amount	Spent Amount	Refresh
S5126	100000		100000		<input type="button" value="Refresh"/>

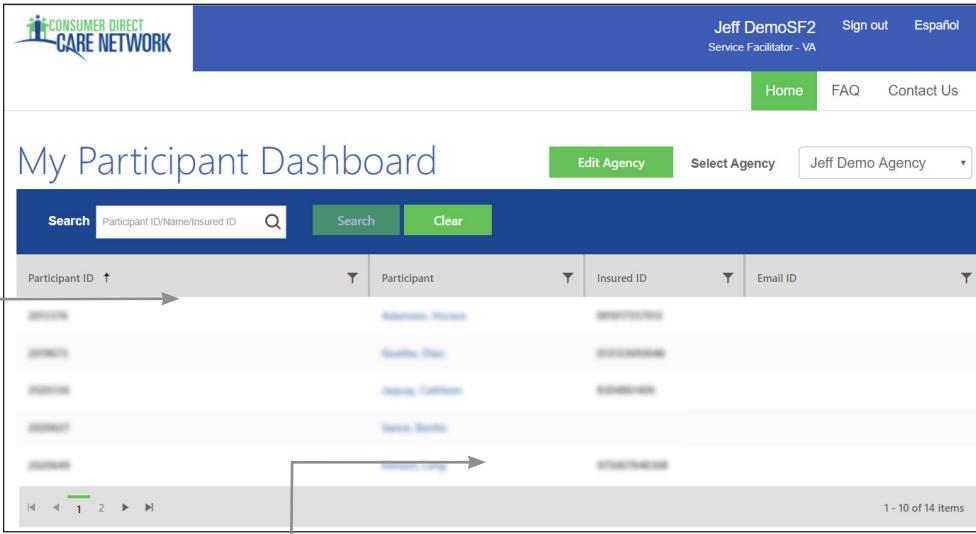
Service/History	Description	Start Date	End Date	Authorization no.	Status	Hours	Bill Units	Unit Range	Range Units	Service Amount	Amount Range	PM PM
S5126	Attendant	08/01/2019	12/31/2019	test	Active	100000	100000	Daily	653.59		Daily	No
S5126	Attendant	08/01/2019	12/31/2019	test	Active	100000	100000	Daily	653.59		Daily	No

# My Participant Dashboard

## My Participant Dashboard

With this dashboard you can find information about specific participants and see their service as a whole. Finding and selecting a participant gives you demographic information, a list of caregivers who work for them, their employer of record, and service history. There are also reports available for service details and summaries.

As with the Authorization Dashboard, you can sort and filter to narrow results.



**Search**  
Find a participant by name, CDCN ID, or Insured ID (Medicaid ID).

**My Participant Dashboard**

Jeff DemoSF2  
Service Facilitator - VA

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Edit Agency Select Agency Jeff Demo Agency

Participant ID ↑	Participant	Insured ID	Email ID
123456	Adams, Robert	123456789	
123457	Smith, John	987654321	
123458	Johnson, William	111222333	
123459	Williams, Mary	444555666	
123460	Johnson, Mary	777888999	

1 - 10 of 14 items

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

# 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 8.

### General Information

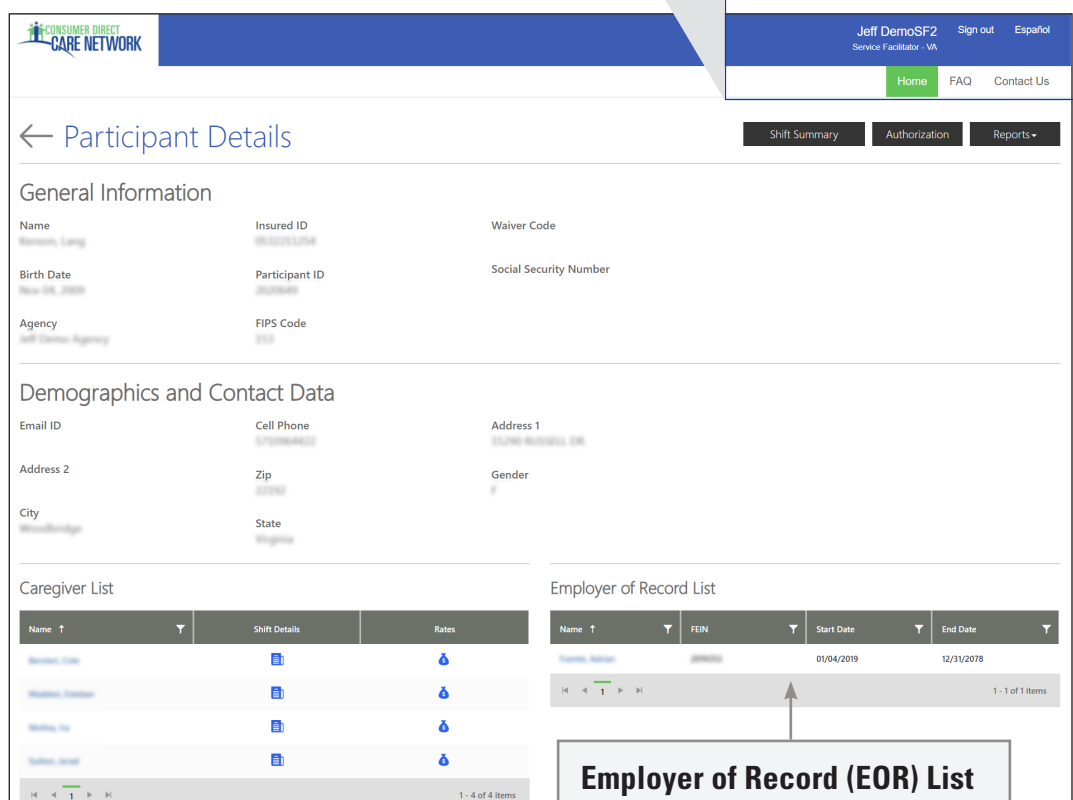
Such as name, CDCN ID, Birthdate, Insured ID.

### 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 6).



**Participant Details**

**General Information**

Name Remond, Long	Insured ID 0000000000	Waiver Code
Birth Date New 08, 2000	Participant ID 00000000	Social Security Number
Agency Jeff Davis Agency	FIPS Code 000	

**Demographics and Contact Data**

Email ID	Cell Phone 1234567890	Address 1 1234 Main St, VA
Address 2	Zip 22000	Gender M
City Woodbridge	State Virginia	

**Caregiver List**

Name ↑	Shift Details	Rates
Remond, Long		
Remond, Long		
Remond, Long		
Remond, Long		

1 - 4 of 4 Items

**Employer of Record List**

Name ↑	FEIN	Start Date	End Date
Remond, Long	000000	01/04/2019	12/31/2078

1 - 1 of 1 Items

### Employer of Record (EOR) List

A historical list of EORs known by Consumer Direct. Click their name for EOR details (page 7).

# 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.

Caregiver List

Name ↑	Shift Details	Rates
<a href="#">Service Code</a> <b>A</b>	<a href="#">Shift Details</a> <b>C</b>	<a href="#">Rates</a> <b>B</b>
<a href="#">Respite Code</a>	<a href="#">Shift Details</a>	<a href="#">Rates</a>
<a href="#">Respite Code</a>	<a href="#">Shift Details</a>	<a href="#">Rates</a>
<a href="#">Respite Code</a>	<a href="#">Shift Details</a>	<a href="#">Rates</a>
<a href="#">Respite Code</a>	<a href="#">Shift Details</a>	<a href="#">Rates</a>

1 - 4 of 4 items

## Caregiver Details (A)

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

Jeff DemoSF2  
Service Facilitator - VA

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### Caregiver Details

General Information

Name: [Jeff DemoSF2](#) Caregiver ID: 202110400 Date of Birth: Sep 17, 1962

Social Security Number: 808-88-2027 Hire Date: Dec 15, 2018

Demographics and Contact Data

Email ID: Address 1: 1305 SLOAN HEBERTS CIR

Address 2: Zip: 24612

City: Rocky Mountain State: Virginia

## Caregiver Rate (B) 💰

Shows the Caregiver's pay rates by Service Code.

Customer Employee Rate

Participant: [Jeff DemoSF2](#) Caregiver: [Jeff DemoSF2](#)

Service Code ↑	Rate ↑	Start Date ↑	End Date ↑
Attendant	9.22	12/13/2018	06/30/2019
Attendant	9.4	07/01/2019	12/31/2078
Companion	9.22	12/13/2018	06/30/2019
Companion	9.4	07/01/2019	12/31/2078
Respite	9.22	12/13/2018	06/30/2019

1 - 5 of 6 items

## 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).

Start Date: 08/24/2019 End Date: 09/23/2019 Search Clear

Caregiver Name ↑	Caregiver ID ↑	Service Code Description ↑	Service Date ↑	Time In ↑	Time Out ↑	Hours ↑	Check Number ↑	Check Amount ↑
<a href="#">Jeff DemoSF2</a>	202110400	Attendant	08/25/2019	09:00	16:30	7.5	D000130515	\$70.00
<a href="#">Jeff DemoSF2</a>	202110400	Attendant	08/26/2019	07:00	14:00	7.0	D000130515	\$66.00
<a href="#">Jeff DemoSF2</a>	202110400	Attendant	08/26/2019	22:30	23:59	1.5	D000130515	\$14.00
<a href="#">Jeff DemoSF2</a>	202110400	Attendant	08/27/2019	04:00	16:30	12.5	D000130515	\$118.00
<a href="#">Jeff DemoSF2</a>	202110400	Attendant	08/28/2019	09:00	14:00	5.0	D000130515	\$47.00

1 - 5 of 5 items

# 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.

Name ↑	FEIN	Start Date	End Date
<a href="#">Catholic, Roman</a>	000000000	01/04/2019	12/31/2078
<div> <span>«</span> <span>1</span> <span>»</span> </div> <div>1 - 1 of 1 items</div>			

## Employer Details

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



Jeff DemoSF2  
 Service Facilitator - VA

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← Employer Details

General Information

Name

Catholic, Roman

Caregiver ID

00000000

FEIN

00000000

Social Security Number

000-00-0000

Demographics and Contact Data

Email ID

Cell Phone

Address 1

0000000000

000-000-0000

0000 TOWER ROAD

Address 2

ZIP

City

00000

00000

Rocky Mount

State

Virginia

# 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

This is identical to the Authorizations Dashboard (page 2), however it only lists authorizations for the chosen participant.

## Patient Pay Report

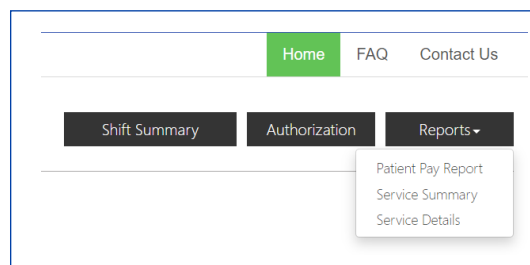
If the Participant is required to pay a portion of their care services, this report details how those funds are applied.

## Service Summary

An overview 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.

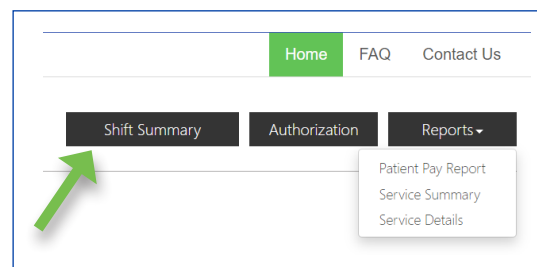




# Shift Summary

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: *James Collins*

Start Date 08/24/2019

End Date 09/23/2019

Search

Clear

Caregiver Name	Caregiver ID	Service Code Description	Service Date	Time In	Time Out	Hours
<i>Abigail, Margaret</i>	<i>200108</i>	Respite	09/02/2019	15:00	15:30	0.5
<i>Abigail, Margaret</i>	<i>200108</i>	Respite	09/03/2019	01:00	02:00	1.0

More info

Check Number	Check Amount	Paid Date	Source	Status	Transaction ID	Reason
N/A	\$0.00	N/A	Web Portal	Saved	TCN2019246SHF000121	N/A
N/A	\$0.00	N/A	Web Portal	Approved	TCN2019247SHF000002	Missing EIN Holder


## Reason

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

# 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.

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.




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[← Patient Pay](#)

August 2019
 

Search

### Patient Pay Detail Report for August 2019

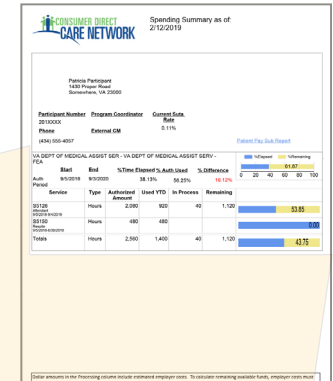
<b>Patient Name</b> [Redacted]	<b>Patient Responsibility:</b> \$0.00	<b>Summary of Deductions by Employee:</b>															
<b>Medicaid ID</b> [Redacted]	<b>Total Deductions:</b> \$0.00	<table> <thead> <tr> <th>Employee Id</th> <th>Employee Name</th> <th>Patient Pay Amount</th> <th>Check Net Amount</th> <th>Check Number</th> <th>Check Date</th> </tr> </thead> <tbody> <tr> <td>[Redacted]</td> <td>[Redacted]</td> <td>\$127.45</td> <td>\$920.88</td> <td>[Redacted]</td> <td>09-06-2019</td> </tr> </tbody> </table>	Employee Id	Employee Name	Patient Pay Amount	Check Net Amount	Check Number	Check Date	[Redacted]	[Redacted]	\$127.45	\$920.88	[Redacted]	09-06-2019			
Employee Id	Employee Name	Patient Pay Amount	Check Net Amount	Check Number	Check Date												
[Redacted]	[Redacted]	\$127.45	\$920.88	[Redacted]	09-06-2019												
<b>Patient ID</b> [Redacted]	<b>Balance Remaining:</b> \$0.00	<div>           1           <div>1 - 1 of 1 items</div> </div>															

# 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.



<u>Participant Number</u> 201XXXX	<u>Program Coordinator</u>  <u>External CM</u>	<u>Current Suta Rate</u> 0.11%
<u>Phone</u> (434) 555-4057		

Patient Pay Sub Report

VA DEPT OF MEDICAL ASSIST SER - VA DEPT OF MEDICAL ASSIST SERV - FEA						<div><div>%Elapsed</div><div>%Remaining</div></div> <div><div></div><div>61.87</div><div>020406080100</div></div>
<u>Start</u>	<u>End</u>	<u>%Time Elapsed</u>	<u>% Auth Used</u>	<u>% Difference</u>		
Auth Period	9/5/2018 9/3/2020	38.13%	56.25%	18.12%		
<u>Service</u>	<u>Type</u>	<u>Authorized Amount</u>	<u>Used YTD</u>	<u>In Process</u>	<u>Remaining</u>	
S5126 Attendant 9/5/2018-9/4/2019	Hours	2,080	920	40	1,120	
S5150 Respite 9/5/2018-6/30/2019	Hours	480	480			
Totals	Hours	2,560	1,400	40	1,120	

## Services

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.

## Payroll and Admin Fees

These fees are in addition to employee pay.

## Service Details

Includes the who, what, when, and how much of each service delivered.

Spending Detail: 4/29/2019 12:00:00 AM - 5/30/2019 12:00:00 AM

Employee	Service Code	Service Date	Pay Period	Pay Date	Pay Units	Pay Rate	Pay Total	Payroll Costs	ADMN Fee	Total Spent	Estimate
.ewis, Larry	S5150	5/16/2019	5/9/2019-5/22/2019	5/31/2019	6	\$9.22	\$55.32	\$0.00	\$0.00	\$61.02	Yes
.ewis, Larry	S5150	5/17/2019	5/9/2019-5/22/2019	5/31/2019	7.5	\$9.22	\$69.15	\$0.00	\$0.00	\$76.28	Yes
.ewis, Larry	S5150	5/18/2019	5/9/2019-5/22/2019	5/31/2019	9.5	\$9.22	\$87.59	\$0.00	\$0.00	\$96.62	Yes
					23		\$212.06	\$0.00	\$0.00	\$233.91	
					23		\$212.06	\$0.00	\$0.00	\$233.91	

## Totals

The last line adds up each pay and financial column.

## Total Spent

The final amount for all services performed in the past 30-days. It adds together the employee's pay, payroll costs, and administrative fees.