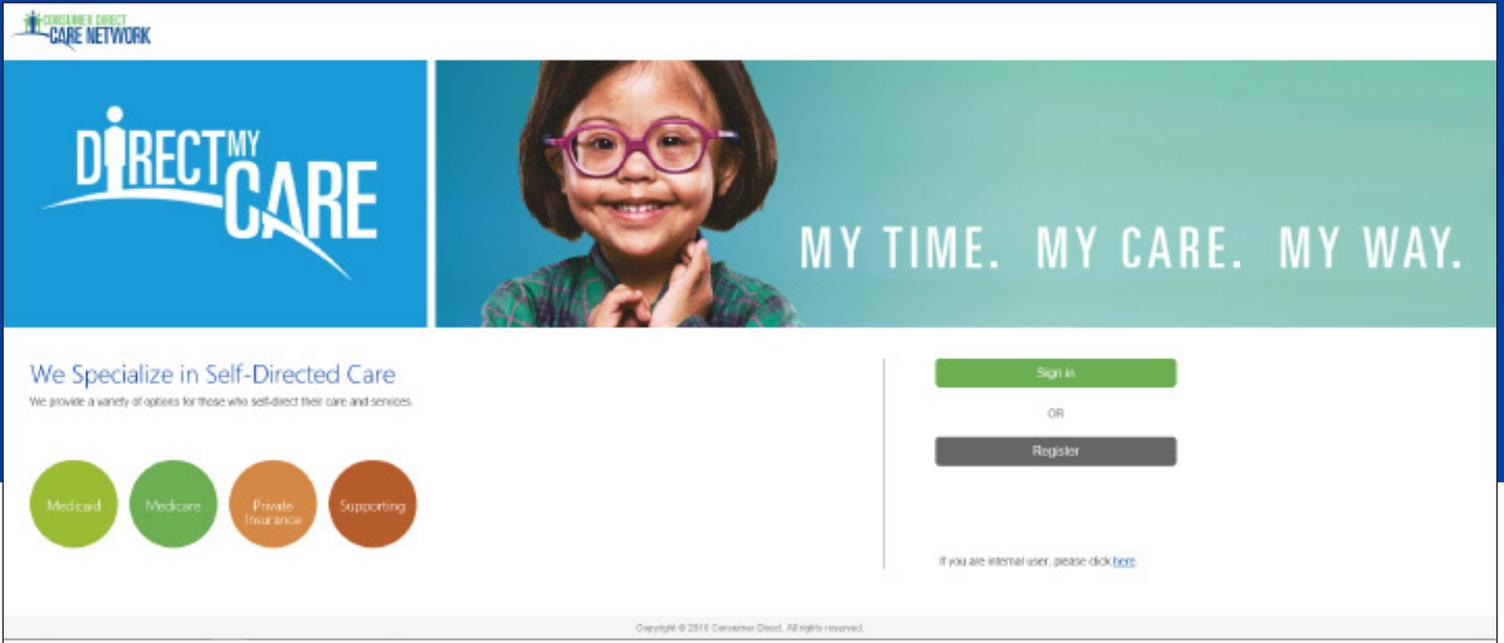


# WELCOME!



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

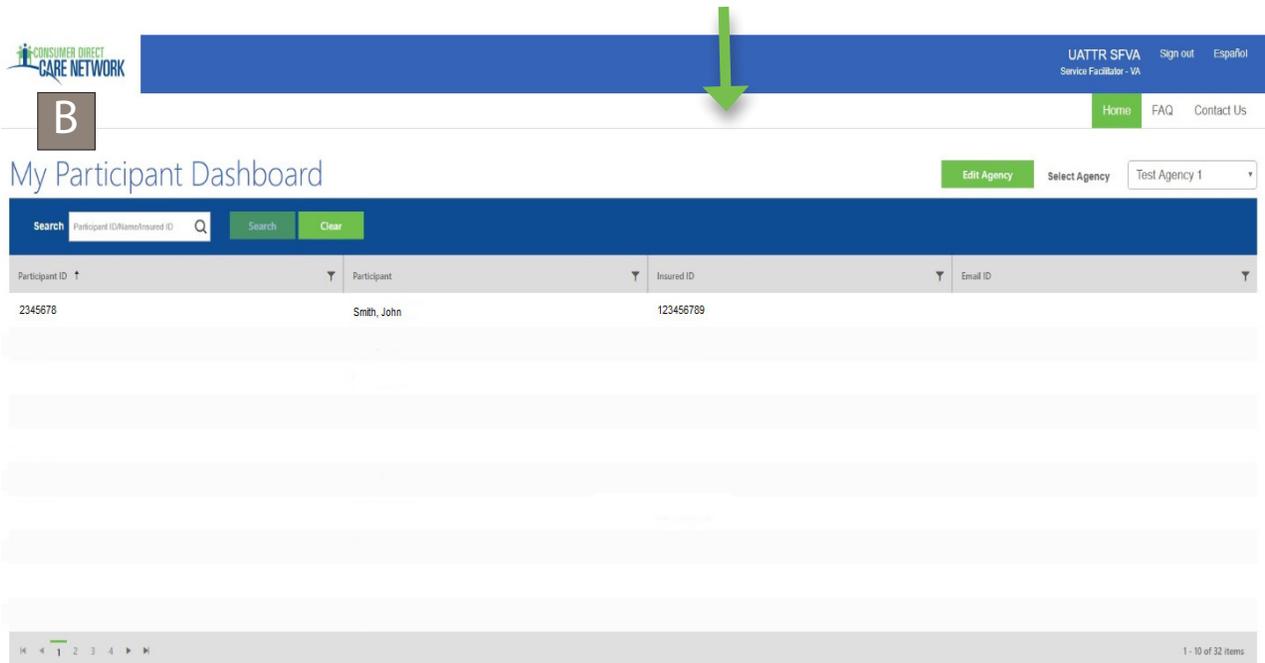
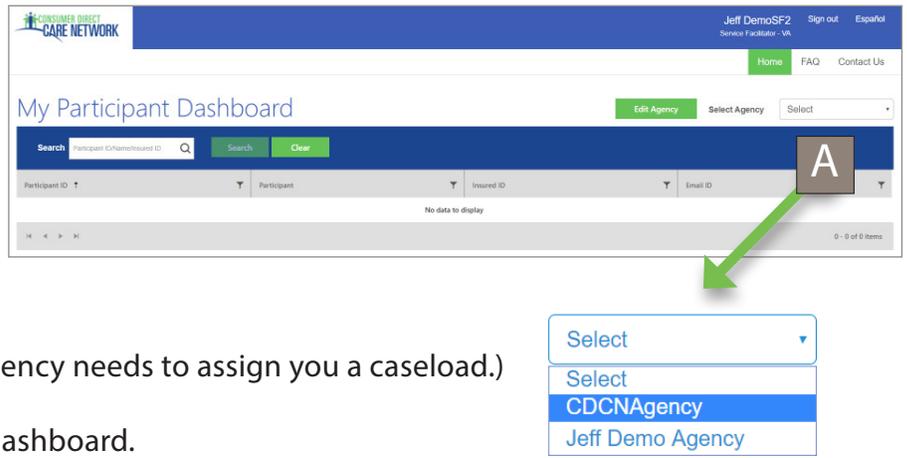
Everything starts with the My Participant Dashboard. When you select a participant you can find out more about them, the caregivers who work with them, the Employer of Record, and spending/utilization reports.

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.

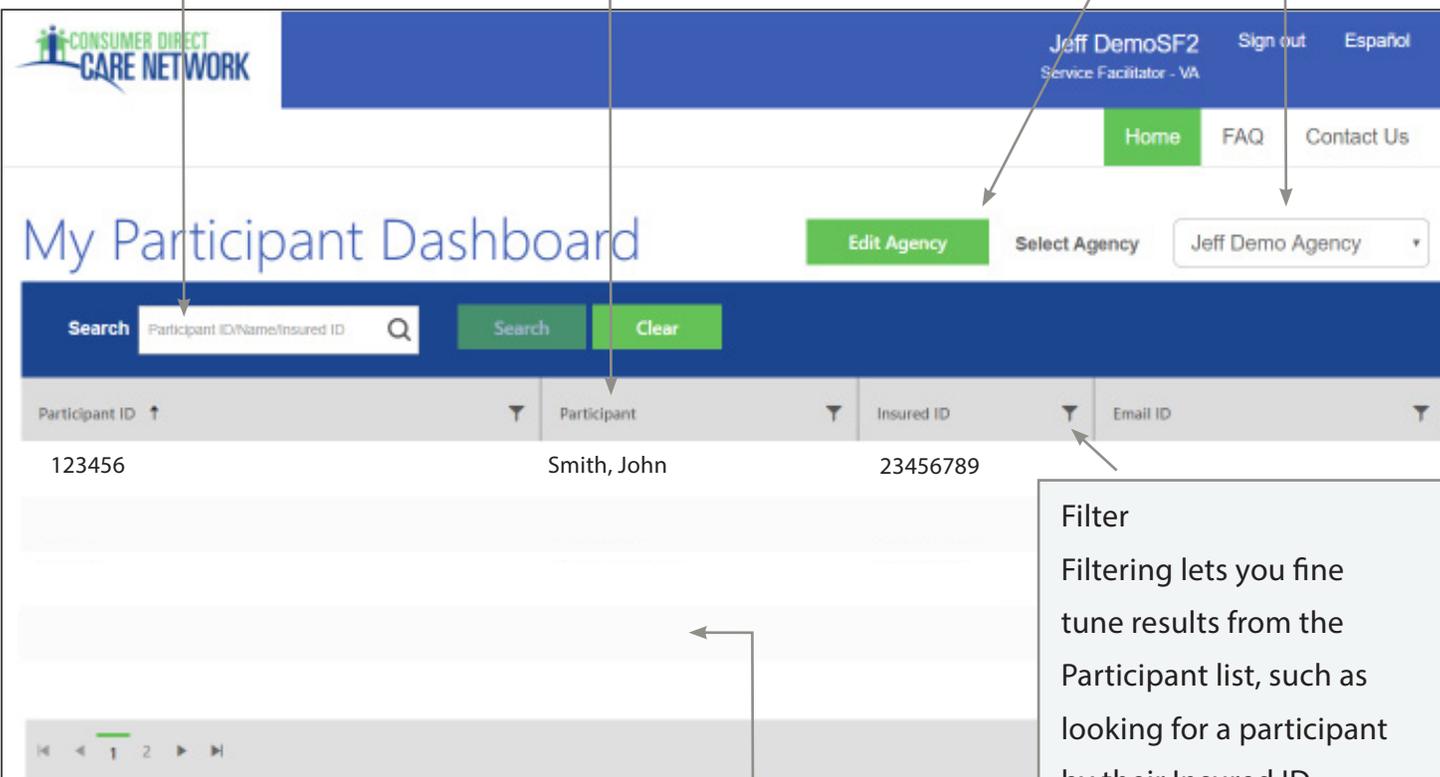
**Sort**  
You can sort any column by clicking its title.

**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.

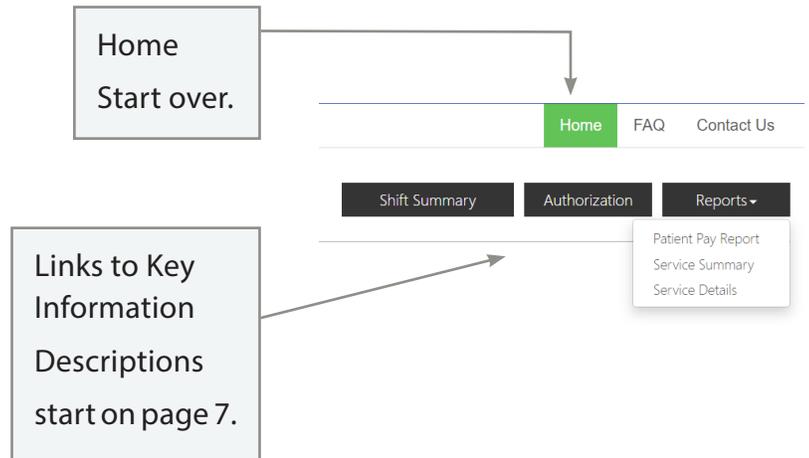


# Participant Details

## 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.



**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).

**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.

Caregiver List

Name ↑	Shift Details	Rates
Service Code		
Attendee Details		
Working on		
Working on		

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

Home FAQ Contact Us

### Caregiver Details

General Information

Name	Caregiver ID	Date of Birth
Shantell, Margerita	20500480	Aug 17, 1962
Social Security Number	Hire Date	
808-98-2827	Dec 13, 2018	

Demographics and Contact Data

Email ID	Cellphone	Address 1
	548822776	1305 COLLEGE HEIGHTS DR
Address 2	Zip	
	29152	
City	State	
Rocky Mountain	Virginia	

## Caregiver Rate (B)

Shows the Caregiver's pay rates by Service Code.

Customer Employee Rate

Participant *Jeffrey, Jeffrey* Caregiver *Shantell, Margerita*

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).

Shift Summary

Participant Name: *[Redacted]*

Start Date: 09/25/2024 End Date: 10/25/2024 Search Clear

Caregiver Name	Caregiver ID	Service Code Descri...	Service Date	Tasks	Additional Informat...	Time In	Time Out
No data to display							

0

# 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
...	...	...	...

1 - 1 of 1 items

## Employer Details

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

The screenshot shows the 'Employer Details' page. At the top, there is a navigation bar with the CDCN logo, user name 'Jeff DemoSF2', and options for 'Sign out' and 'Español'. Below the navigation bar are links for 'Home', 'FAQ', and 'Contact Us'. The main content area is titled '← Employer Details' and is divided into two sections: 'General Information' and 'Demographics and Contact Data'. The 'General Information' section includes fields for Name, Caregiver ID, FEIN, and Social Security Number. The 'Demographics and Contact Data' section includes fields for Email ID, Cell Phone, Address 1, Address 2, ZIP, City, and 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

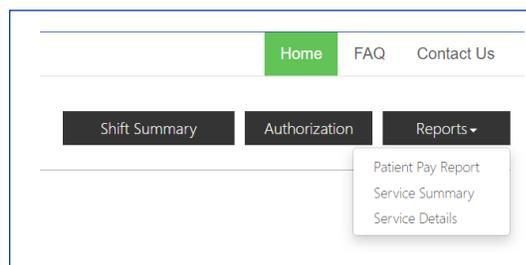
If the Participant is required to pay a portion of their care services, this report details how those funds are applied.

## Service Summary

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

## Service Details

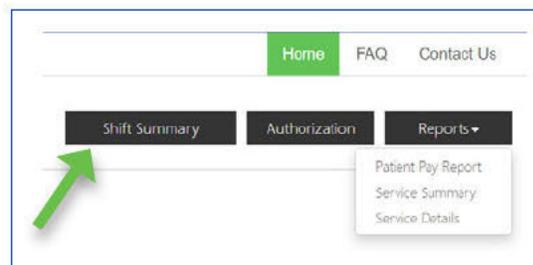
Lists services performed for the Participant in the past month. Includes Service Code, Date of Service, and pay details.



# 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.

**Tasks**  
Lists the tasks completed during the shift by the attendant.

**Additional Information**  
Additional comments field for optional comments submitted by the attendant.

**Filter**  
Fields can be filtered to find specific shifts.

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

More info

Hours	Check Number	Check Amount	Paid Date	Status	Reason	Transaction ID

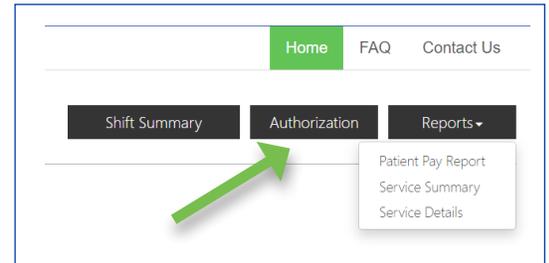
0 - 0 of 0 items

**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 ID/Name/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
▼	ACN2019239AUT00005							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 Back

Client Name	Client ID	DOB
Provider	Program	Sub Account
Agreement No.	Diagnosis Code	Start Date
Status	External Case Manager	End Date

Service Summary

Service	Service Amount	Reserved Amount	Remaining Amount	Spent Amount	Refresh
3012N	70000		70000		

Service/Qty	Description	Start Date	End Date	Authorization no.	Status	Units	Bill Code	Bill Range	Range Code	Service Amount	Amount Range	Rate
3012N	Attendant	08/01/2019	12/31/2019	test	Active	10000	10000	daily	101.00	daily	101	
3015	Attendant	08/01/2019	12/31/2019	test	Active	10000	10000	daily	400.25	daily	101	

# 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 Pay

Report 2019

### → Patient Pay Detail Report for August 2019

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.

Consumer Name: Charlie Brown  
**Patient Responsibility:** \$127.45  
**Medicaid ID:** 123456789105  
**Total Deductions:** \$127.45  
 Consumer ID: 1234567  
**Remaining Balance:** \$0.00

**Summary of Deductions by Employee:**

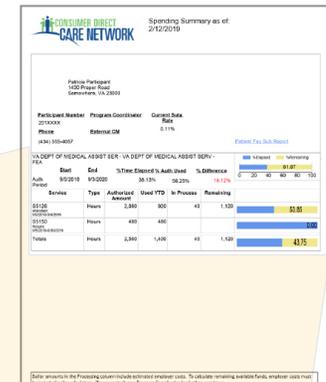
Employee Id	Employee Name	Patient Pay Amount	Check Net Amount	Check Number	Check Date
1		\$127.45	\$920.88	D000126374	09-06-2019

1 - 1 of 1 items

# 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 Rate			
201XXXXX	External CM	0.11%			
Phone	<a href="#">Patient Pay Sub Report</a>				
(434) 555-4057					
VA DEPT OF MEDICAL ASSIST SER - VA DEPT OF MEDICAL ASSIST SERV - FEA					
Auth Period	Start	End			
	9/5/2018	9/3/2020			
% Time Elapsed	% Auth Used	% Difference			
38.13%	56.25%	18.12%			
Service	Type	Authorized Amount	Used YTD	In Process	Remaining
85126 Attendant 9/5/2018-9/3/2019	Hours	2,000	920	40	1,120
85150 Respite 9/5/2018-9/3/2019	Hours	400	400		
<b>Totals</b>	<b>Hours</b>	<b>2,400</b>	<b>1,400</b>	<b>40</b>	<b>1,120</b>

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.

