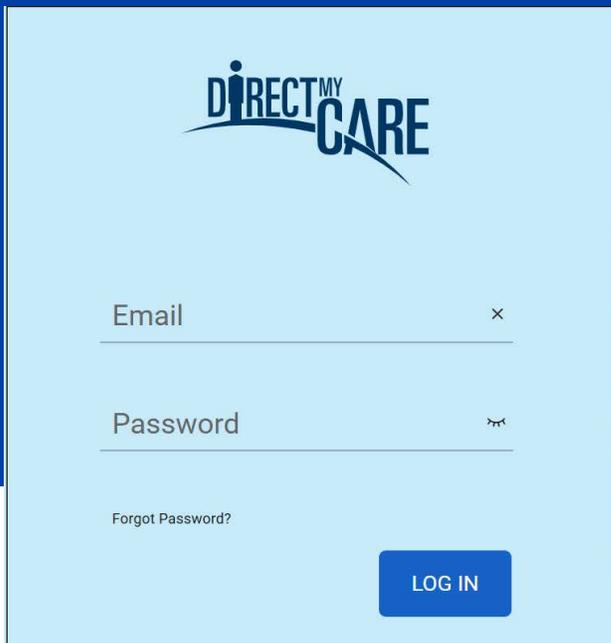


WELCOME!



The screenshot shows the login interface for the Direct My Care portal. At the top left is the 'DIRECT MY CARE' logo. Below it are two input fields: 'Email' with a clear (x) icon and 'Password' with a show/hide (eye) icon. A 'Forgot Password?' link is located below the password field. A blue 'LOG IN' button is positioned at the bottom right of the form area.



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/>

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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).

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.

Contains ▼

Clear
Filter

Next page, more about the authorizations dashboard

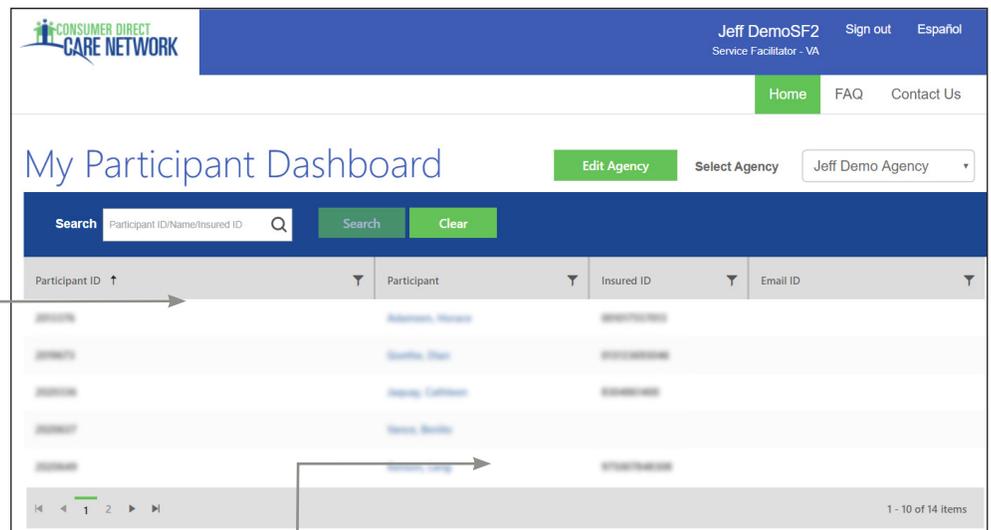
My Participant Dashboard

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).



The screenshot shows the 'My Participant Dashboard' interface. At the top right, it displays the user 'Jeff DemoSF2' as a 'Service Facilitator - VA' with options for 'Sign out' and 'Español'. Below this are navigation links for 'Home', 'FAQ', and 'Contact Us'. The main heading is 'My Participant Dashboard' with an 'Edit Agency' button and a 'Select Agency' dropdown menu currently set to 'Jeff Demo Agency'. A search bar is present with the placeholder text 'Participant ID/Name/Insured ID' and buttons for 'Search' and 'Clear'. Below the search bar is a table with columns for 'Participant ID', 'Participant', 'Insured ID', and 'Email ID'. The table contains several rows of data. A callout box on the left points to the search bar, and another callout box at the bottom points to a participant's name in the table.

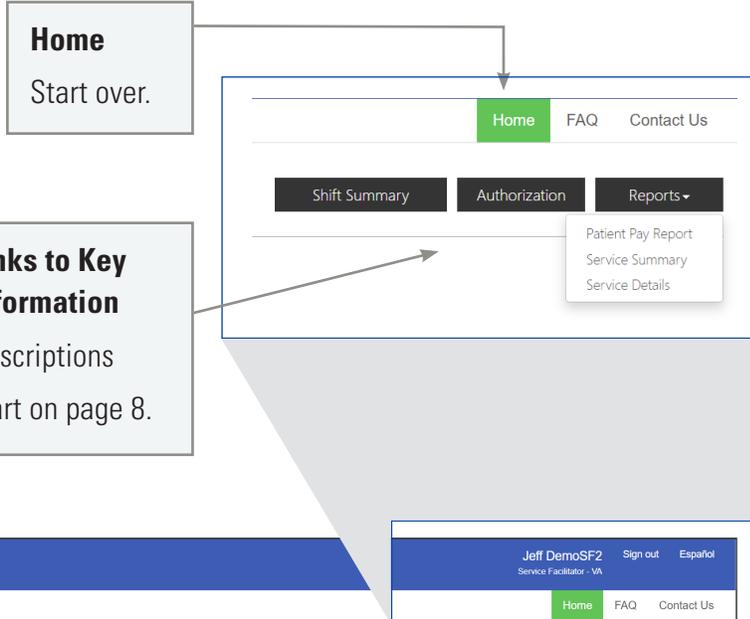
View Participant Details
Click the participant's name to view their information.

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 6).

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
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, Margerite	20500492	Aug 17, 1962
Social Security Number	Hire Date	
808-98-2827	Dec 13, 2018	

Demographics and Contact Data

Email ID	Cellphone	Address 1
	548552776	1305 COLMAN HEIGHTS DR
Address 2	Zip	
	38612	
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, Margerite*

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
Catholic, Roman	000000	01/04/2019	12/31/2078

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 (Catholic, Roman), Caregiver ID (2000000), FEIN (000000), and Social Security Number (000-00-0000). The 'Demographics and Contact Data' section includes fields for Email ID, Cell Phone (1408000000), Address 1 (1718 TOMBER ROAD), Address 2, ZIP (24033), City (Bridgewater), and 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

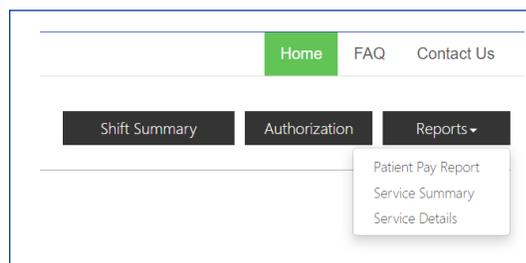
If the Participant is required to pay a portion of their care services, this report details how those funds are applied.

Service Summary

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

Service Details

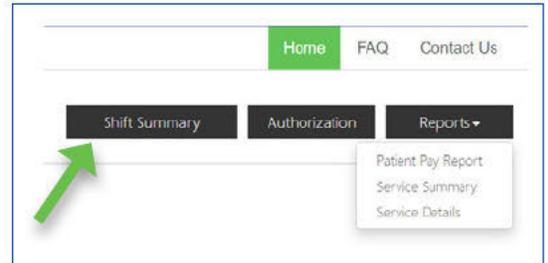
Lists services performed for the Participant in the past month. Includes Service Code, Date of Service, and pay details.



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.

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

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.

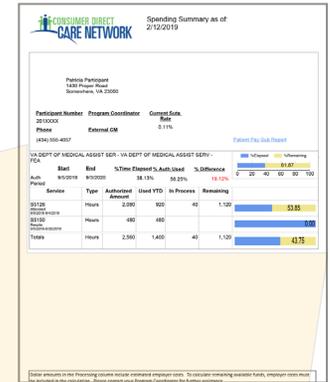
The screenshot shows the 'Patient Pay' report for August 2019. The interface includes a top navigation bar with the CDCN logo, user information for 'UATVA MCOLS', and links for 'Sign out' and 'Español'. Below this is a secondary navigation bar with 'Home', 'FAQ', and 'Contact Us'. The main content area features a back arrow, the title 'Patient Pay', a date selector for 'August 2019', and a 'Search' button. The report title is 'Patient Pay Detail Report for August 2019'. It displays patient information (Name, Medicaid ID, Patient ID), Patient Responsibility (\$0.00), Total Deductions (\$0.00), and Balance Remaining (\$0.00). A table titled 'Summary of Deductions by Employee' shows one entry with a Patient Pay Amount of \$127.45 and a Check Net Amount of \$920.88.

Patient Name	Patient Responsibility:	Summary of Deductions by Employee:					
[Redacted]	\$0.00	Employee Id	Employee Name	Patient Pay Amount	Check Net Amount	Check Number	Check Date
Medicaid ID	Total Deductions:	[Redacted]	[Redacted]	\$127.45	\$920.88	[Redacted]	09-06-2019
[Redacted]	\$0.00	[Redacted]	[Redacted]				
Patient ID	Balance Remaining:	1					1 - 1 of 1 items
[Redacted]	\$0.00						

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 Suta Rate
201XXXX	External CM	0.11%
Phone	(434) 555-4057	

Auth Period	Start	End	%Time Elapsed	% Auth Used	% Difference
9/5/2018	9/3/2020	38.13%	56.25%	18.12%	

Service	Type	Authorized Amount	Used YTD	In Process	Remaining
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.

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	

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

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.