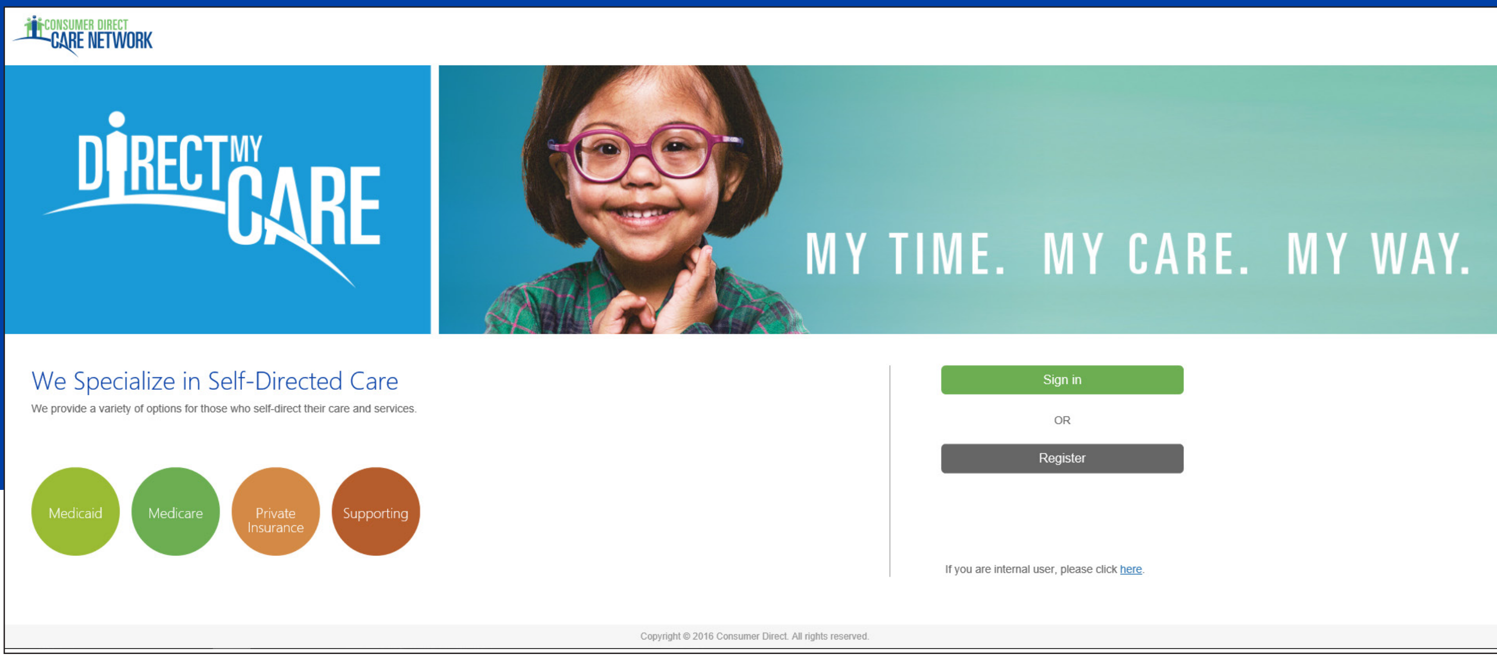
WELCOME!



The Consumer Direct Care Network Portal, or CDCN Portal, allows Service Facilitators and External Case Managers 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.

Agencies can control which participants service facilitators and external case managers can see in the Portal by managing caseloads.

This guide is about creating case loads, assigning participants and service facilitators to case loads, and managing case load membership.

Note on Terminology:

Portal roles may be abbreviated in this guide as:
ECM, *External Case Manager*
SF, *Service Facilitator*
EOR, *Employer of Record*

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My Dashboard

Case loads can be managed upon logging in to the Portal. My Dashboard shows a list of current case loads, the ability to add or delete case loads, and access to information about participants and service facilitators.

My Dashboard: Overview

Search

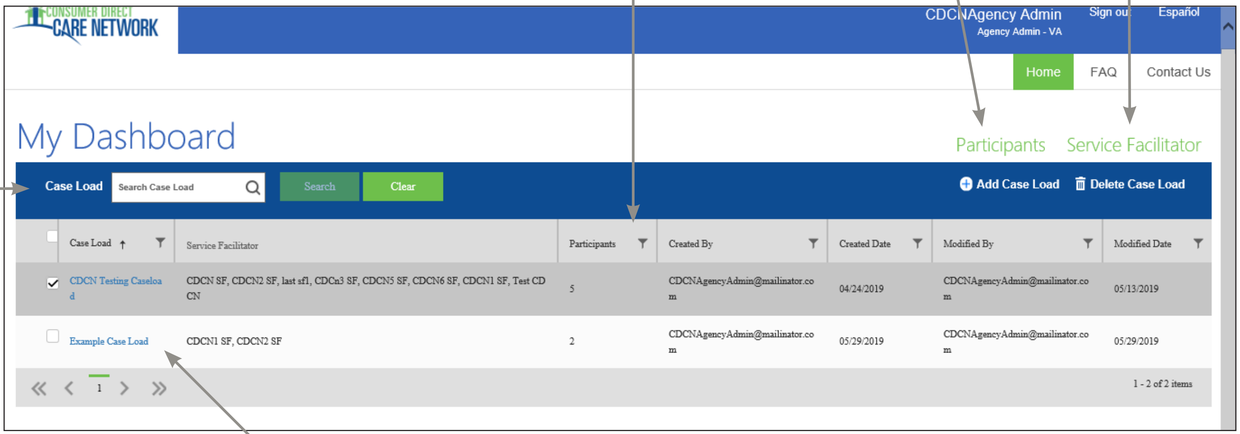
Find a case load by name.

Sort

Sort columns with a filter to quickly find Case Loads.

Participants and Service Facilitators

These links open screens where Participants and Service Facilitators can be found and reviewed. See page 6.



Selecting a Case Load

Case loads can be selected for deletion.

View a Case Load

Click the case load name to see all participants and service facilitators in it and to make changes to membership.

Add and Delete Case Load

A new case load can be created any time. To delete a case load, it must be selected.

Adding a Case Load

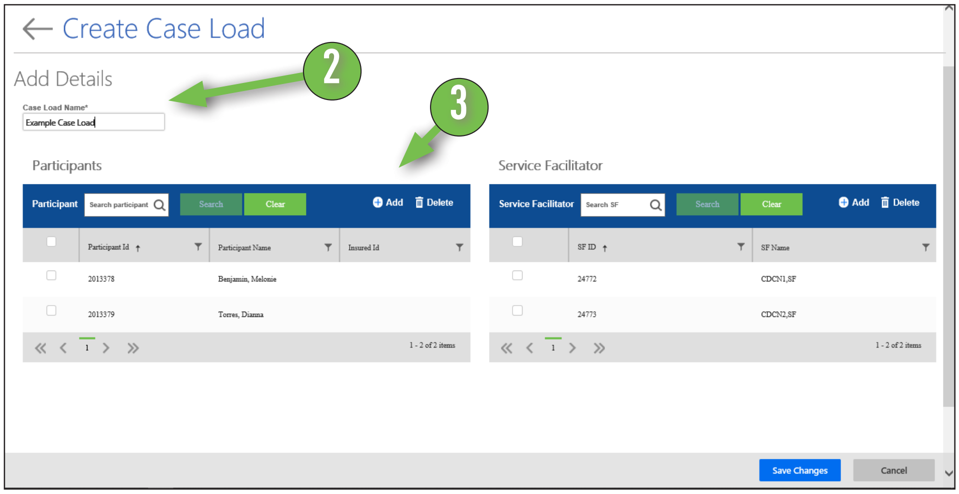
See also Editing a Case Load, on page 5.

Steps to create a case load:

1 Click the **Add Case Load** button on **My Dashboard**. This opens a Create Case Load window.

2 Enter a name for the Case Load.

3 Click the **Add** button in the participants list to find participants to include in the case load.



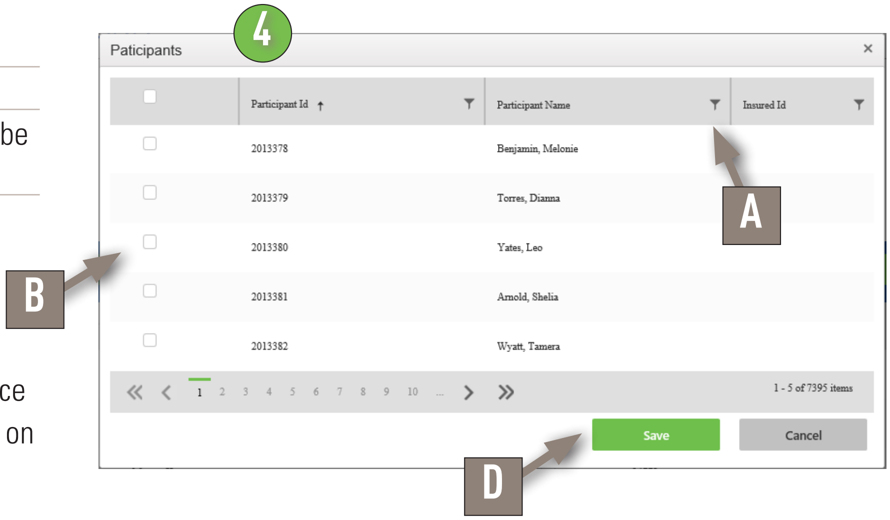
4 Select participants to add to the case load:

A. Filter to fine tune the list by Name or Insured ID (Medicaid ID).

B. Checkmark the participant to add.

C. Repeat A & B for all participants to be added to the case load.

D. Click the **Save** button.



The next step is to choose and add service facilitators to the case load. This step is on the next page.

Creating a Case Load, cont.

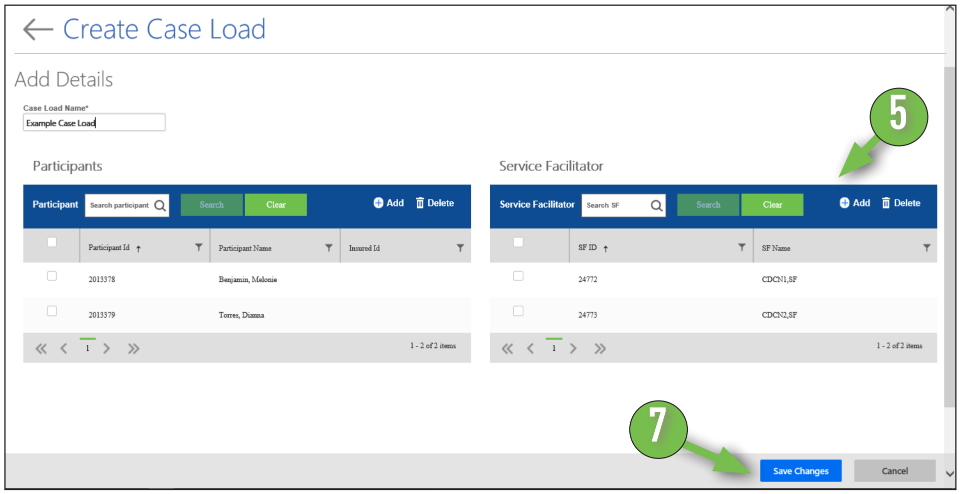
5 Click the **Add** button in the service facilitators list. This shows a list of service facilitators.

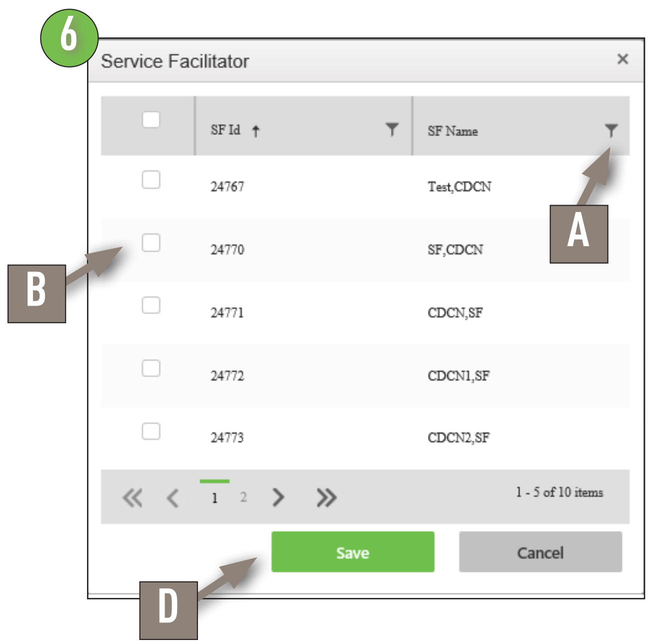
6 Select service facilitators:

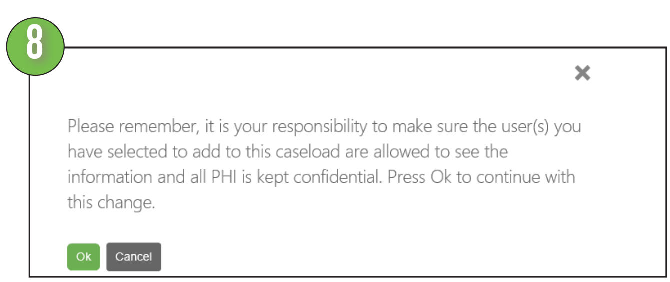
- **A.** Filter to fine tune the list by Name or SF ID.
- **B.** Checkmark the service facilitator to add.
- **C.** Repeat A & B for all service facilitators to be added to the case load.
- **D.** Click the **Save** button.

7 After participants and service facilitators have been added to the case load, click **Save Changes**.

8 A reminder pops up that it is your responsibility to make sure the users (service facilitators) are allowed to see Protected Health Information.
Click **OK** if you wish to continue with changes made.



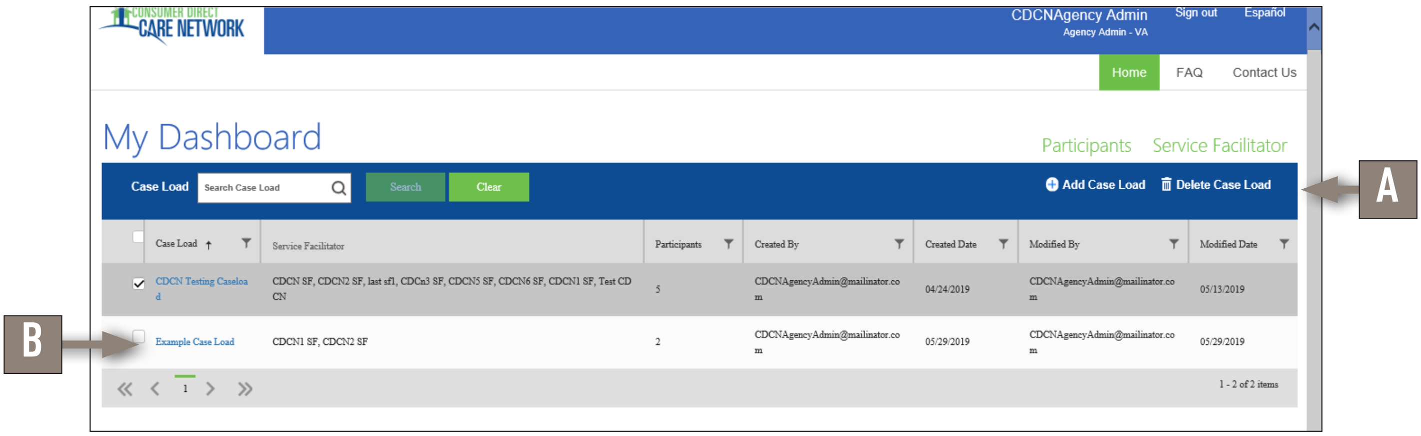




Editing a Case Load

You can add or remove people to a current case load. You can also delete an entire case load.

To make changes to a case load, first find the Case Load from **My Dashboard.** Filter and sort can speed things up.



To Delete a Case Load:

In the My Dashboard window, checkmark the case load you wish to delete. Then click the Delete Case Load button (A).

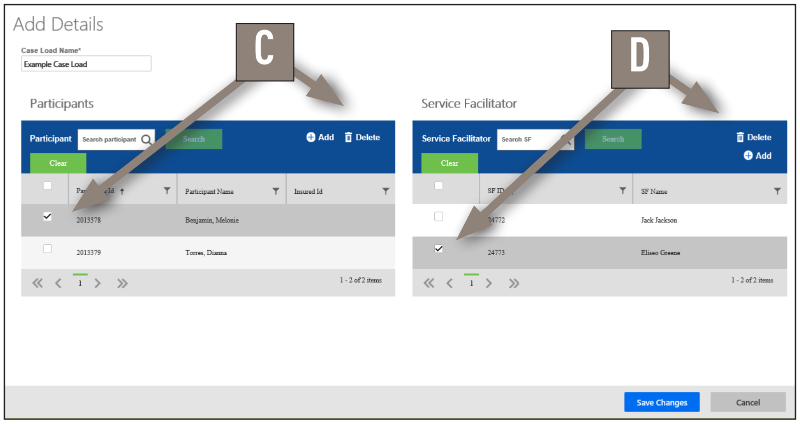
To Add Participants or Service Facilitators to a Case Load:

In the My Dashboard window, click the name of the case load (B) you wish to change. Then add people using the steps on pages 3 & 4. click **Save Changes** when done.

To Remove Participants or Service Facilitators to a Case Load:

In the My Dashboard window, click the name of the case load from the My Dashboard window(B). This opens the case load. Checkmark the participant(s) to remove and click **Delete** (C). Checkmark the service facilitator(s) to remove and click **Delete** (D).

Then click **Save Changes**.



My Participant Dashboard

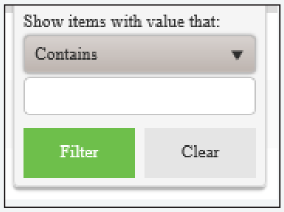
Information about participants can be seen by clicking the **Participants** *link from the Portal home (My Dashboard).*

My Participant Dashboard: Overview

This dashboard contains information about participants. Once a participant is chosen, you can see additional details about them. This includes the employees who work with them, the employer of record, and spending/utilization reports.

Filter

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

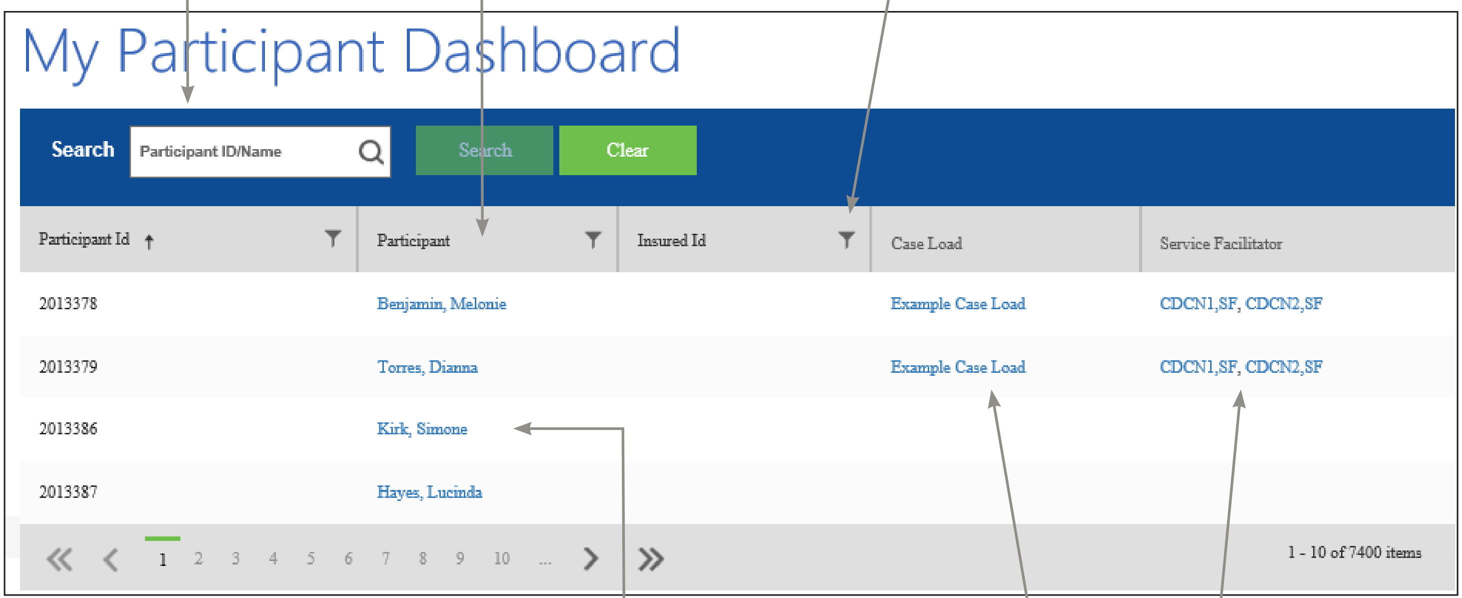


Search

Find a participant by name CDCN ID.

Sort

You can sort any column by clicking its title.



See More Results

Navigate back and forward through results here.

View Participant Details

Click the participant's name to view their information.

Case Load and Service Facilitators

Clicking these shows details about a case load or service facilitator.

CONSUMER DIRECT CARE NETWORK

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 employees, and can open their shift details and rates of pay.

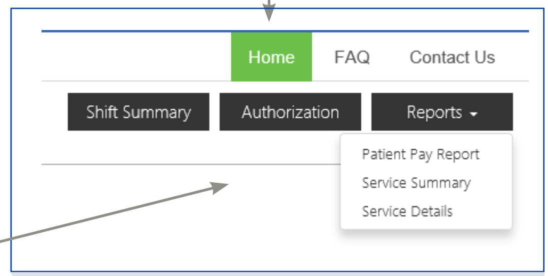
The upper right area of the window leads to key information like **Authorizations, Reports, and Shift Summaries**.

Home

Start over.

Links to Key Information

Descriptions start on page 11.



General Information

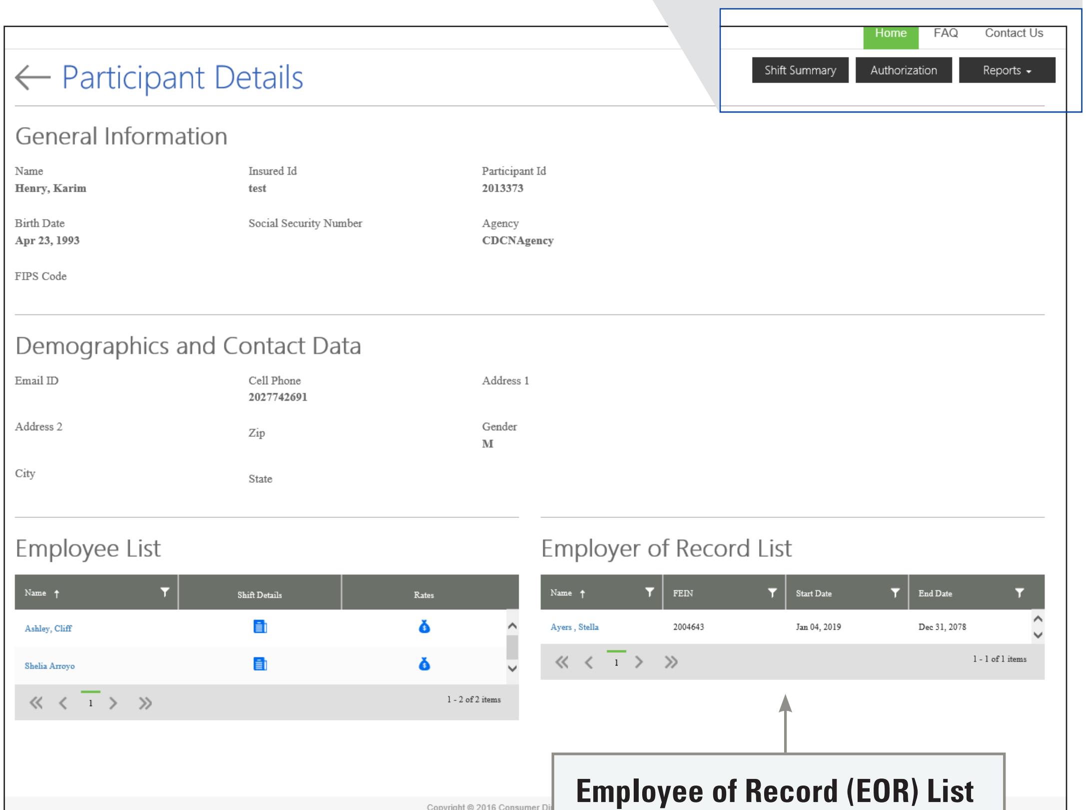
Such as name, CDCN ID, Birthdate, Insured ID.

Demographics

Such as address, phone number, email address.

Employee List

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



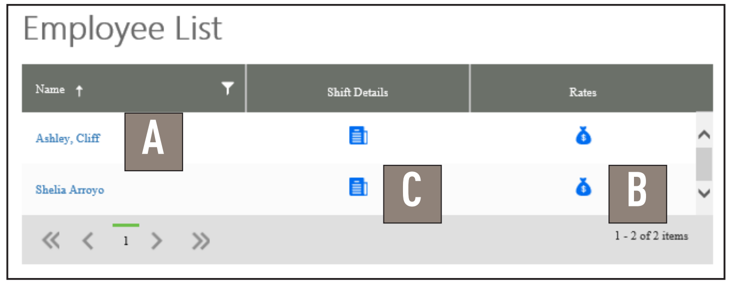
Employee of Record (EOR) List

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

Participant Details, Employee Info

Information about Employees

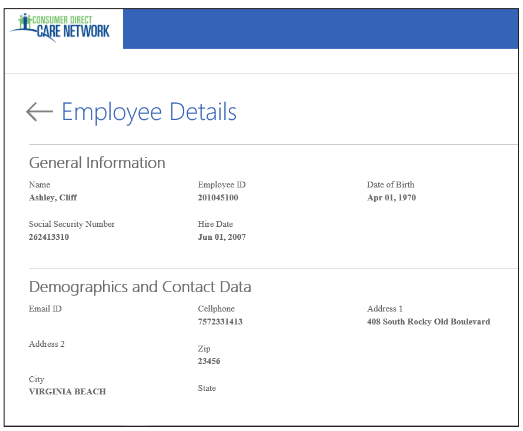
At the bottom of each participant's detail page is a list of employees. Clicking their name shows information about the employee.



Name	Shift Details	Rates
Ashley, Cliff		
Shelia Arroyo		

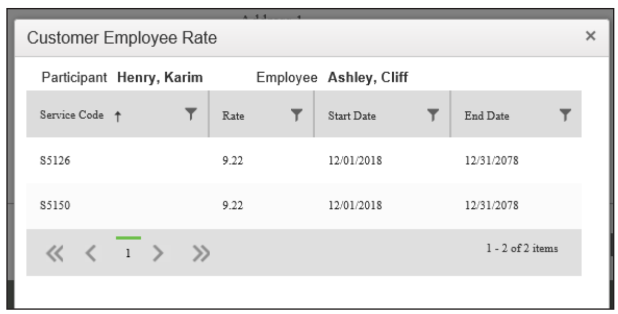
Employee Details (A)

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



Employee Rate (B)

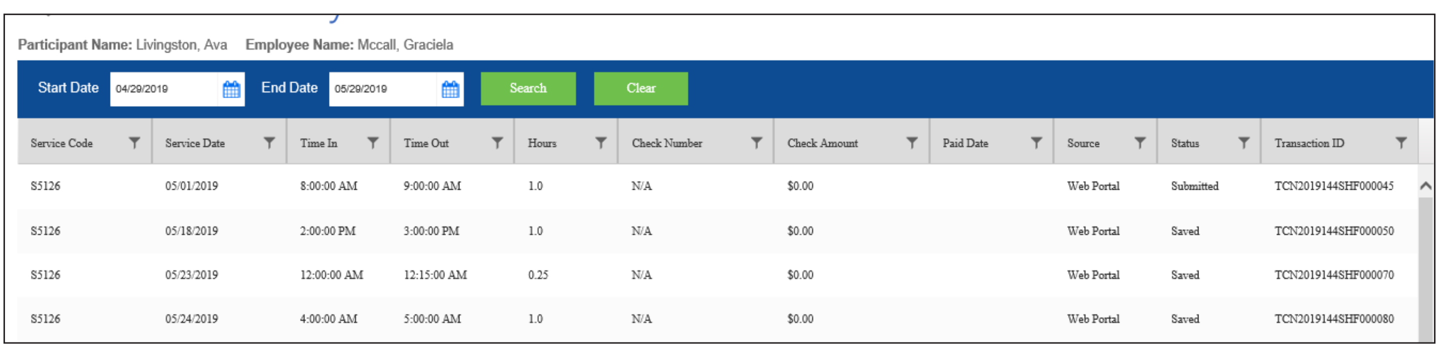
Shows the Employee's pay rates by Service Code.



Service Code	Rate	Start Date	End Date
S5126	9.22	12/01/2018	12/31/2078
S5150	9.22	12/01/2018	12/31/2078

Shift Summary (C)

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

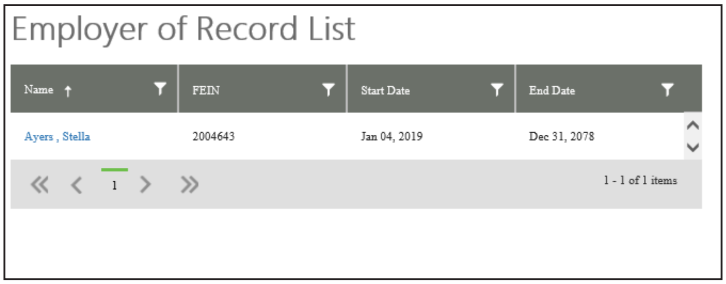


Service Code	Service Date	Time In	Time Out	Hours	Check Number	Check Amount	Paid Date	Source	Status	Transaction ID
S5126	05/01/2019	8:00:00 AM	9:00:00 AM	1.0	N/A	$0.00		Web Portal	Submitted	TCN2019144SHF000045
S5126	05/18/2019	2:00:00 PM	3:00:00 PM	1.0	N/A	$0.00		Web Portal	Saved	TCN2019144SHF000050
S5126	05/23/2019	12:00:00 AM	12:15:00 AM	0.25	N/A	$0.00		Web Portal	Saved	TCN2019144SHF000070
S5126	05/24/2019	4:00:00 AM	5:00:00 AM	1.0	N/A	$0.00		Web Portal	Saved	TCN2019144SHF000080

Participant Details, Employer Info

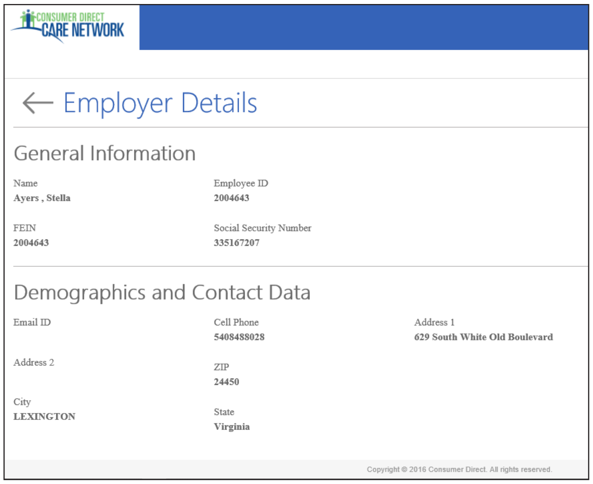
Information about Employers

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 Details

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



Service Facilitators

Click the ***Service Facilitators*** *link from the Portal home (My Dashboard) to see more information about them. Or click the service facilitator's name in the My Participant Dashboard.*

Service Facilitators

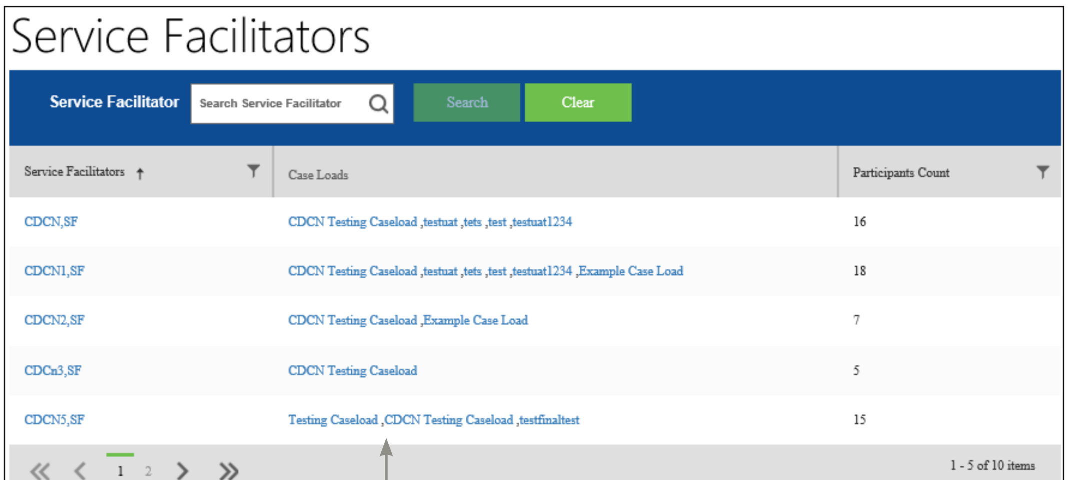
The Service Facilitators screen lists all service facilitators, the case loads they belong to, and how many participants the SF can see in the Portal. Note that you can filter and sort some columns just like in My Dashboard.

Service Facilitator

See more about the service facilitator.

Case Loads

Open a Case Load for editing.



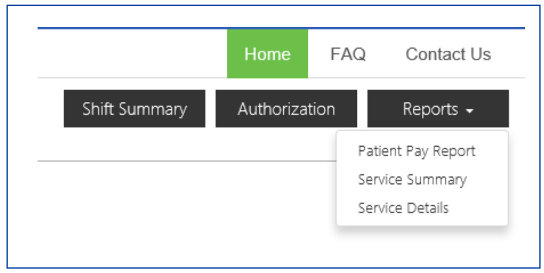
Service Facilitator Details

The Service Facilitator Details screen shows General Information, Demographics, and Contact Data about the service facilitator.

This includes email address, phone number, and address, if known.

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.

Coming Soon!

Service Summary

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

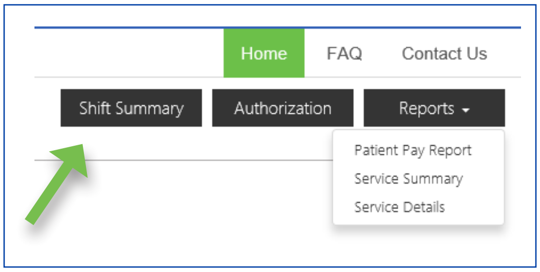
Service Details

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

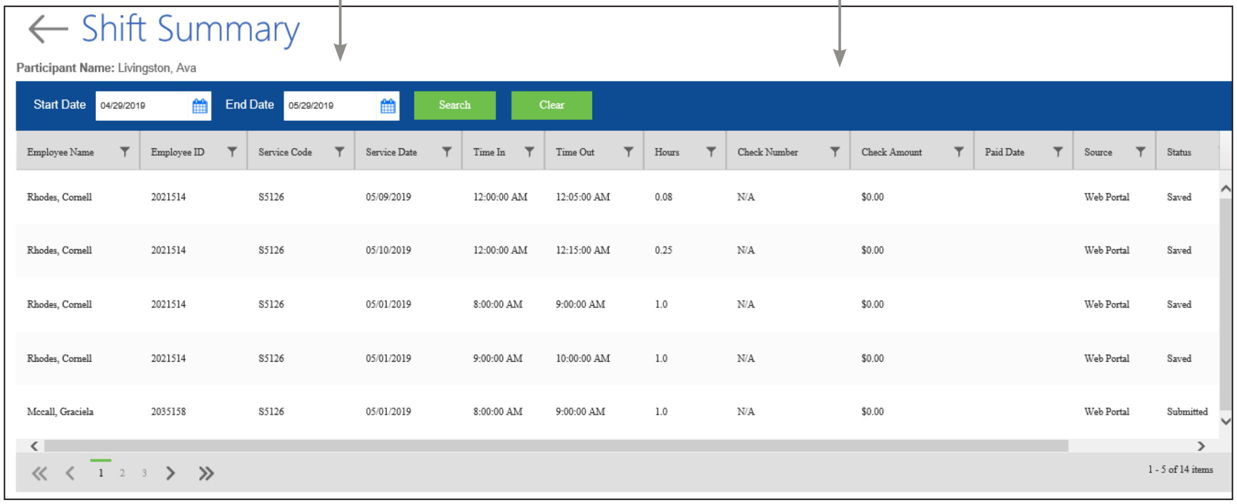
Search for any date range up to 30 days at a time.

Filter

Fields can be filtered to find specific shifts.

Fields

Includes Employee information, details about their service and pay.



Employee Name	Employee ID	Service Code	Service Date	Time In	Time Out	Hours	Check Number	Check Amount	Paid Date	Source	Status
Rhodes, Cornell	2021514	S5126	05/09/2019	12:00:00 AM	12:05:00 AM	0.08	N/A	$0.00		Web Portal	Saved
Rhodes, Cornell	2021514	S5126	05/10/2019	12:00:00 AM	12:15:00 AM	0.25	N/A	$0.00		Web Portal	Saved
Rhodes, Cornell	2021514	S5126	05/01/2019	8:00:00 AM	9:00:00 AM	1.0	N/A	$0.00		Web Portal	Saved
Rhodes, Cornell	2021514	S5126	05/01/2019	9:00:00 AM	10:00:00 AM	1.0	N/A	$0.00		Web Portal	Saved
Mccall, Graciela	2035158	S5126	05/01/2019	8:00:00 AM	9:00:00 AM	1.0	N/A	$0.00		Web Portal	Submitted

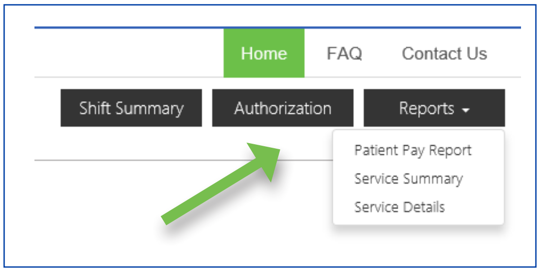
Navigate Results

Use the navigation tools to see more results.

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 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. **Tip:** *Filter the Status column to show only active authorizations.*

Expand an Auth

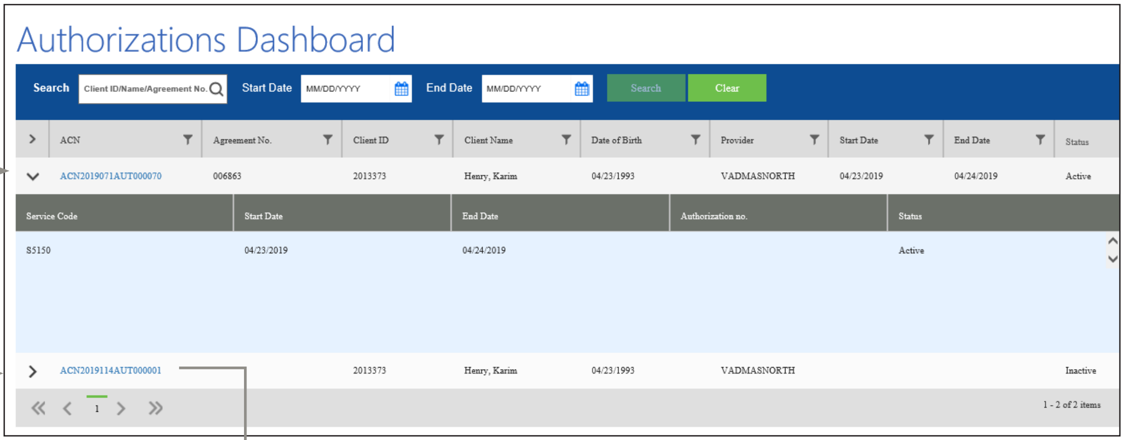
Click the arrow to show more details about the Authorization.

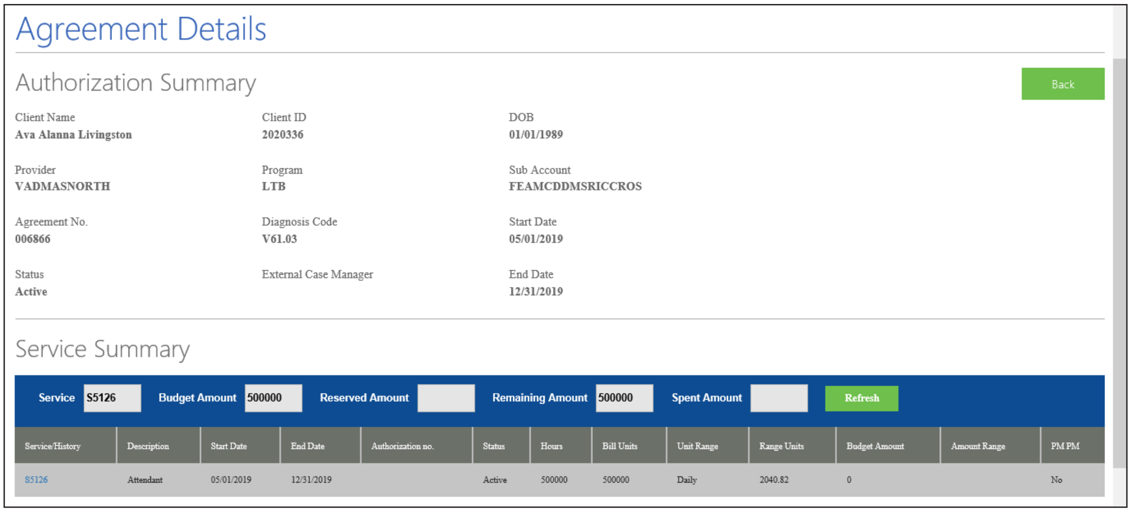
View Auth Details

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.





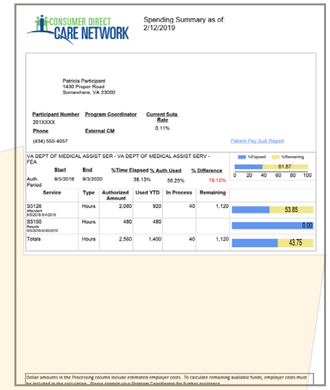
Patient Pay Report

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

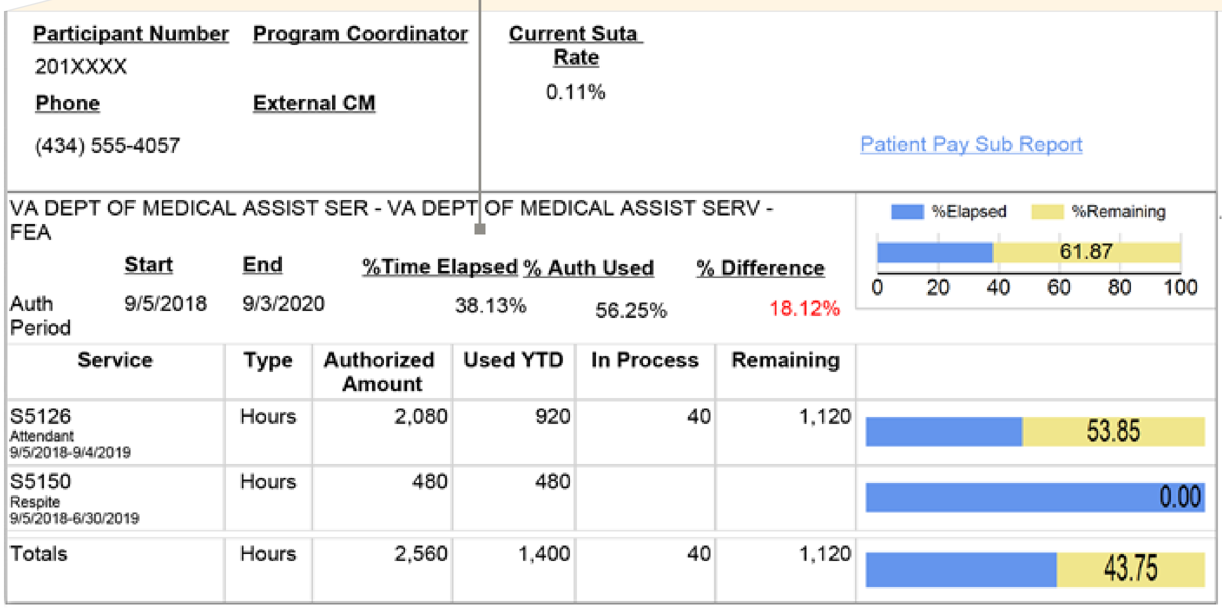
Coming Soon!

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		0.11%
Phone	External CM	
(434) 555-4057		Patient Pay Sub Report

VA DEPT OF MEDICAL ASSIST SER - VA DEPT OF MEDICAL ASSIST SERV - FEA

	Start	End	%Time Elapsed	% Auth Used	% Difference
Auth Period	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	53.85
S5150 Respite 9/5/2018-6/30/2019	Hours	480	480			0.00
Totals	Hours	2,560	1,400	40	1,120	43.75

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
Lewis, 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
Lewis, 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
Lewis, 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.