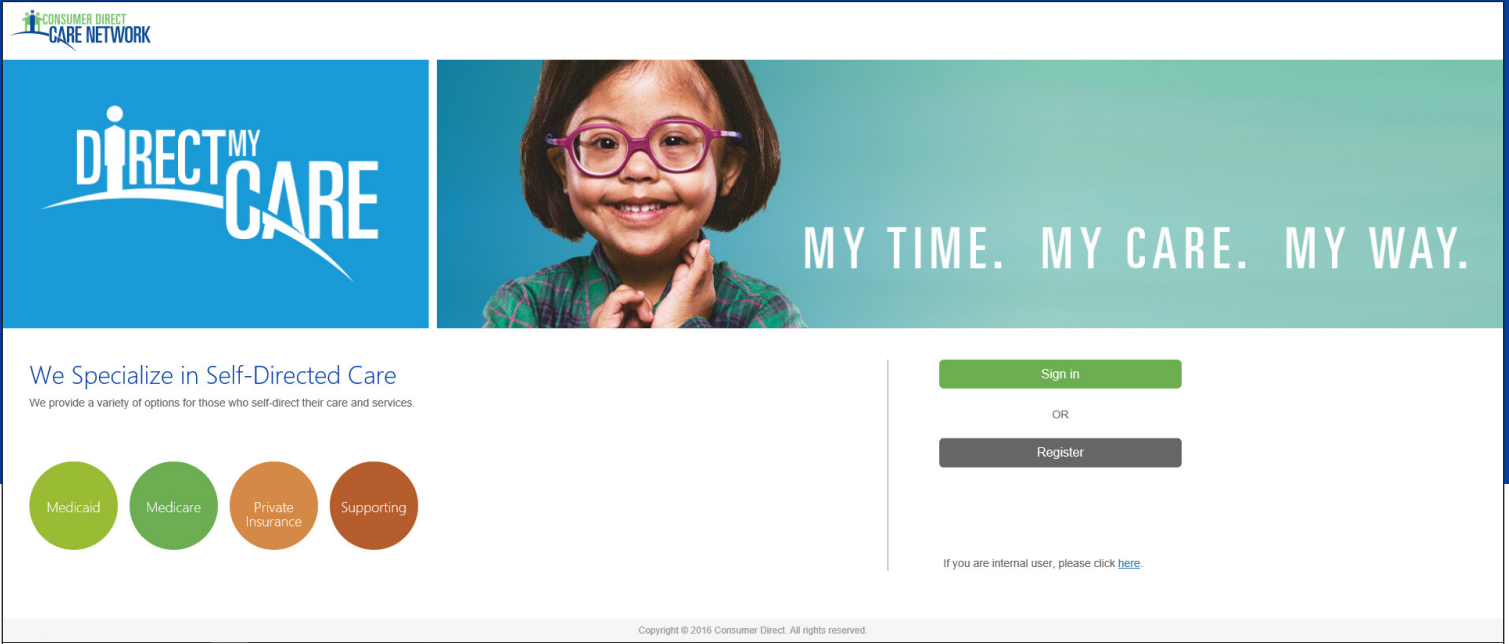


# WELCOME!



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 small link: 'If you are internal user, please click [here](#).' At the very 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, 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**

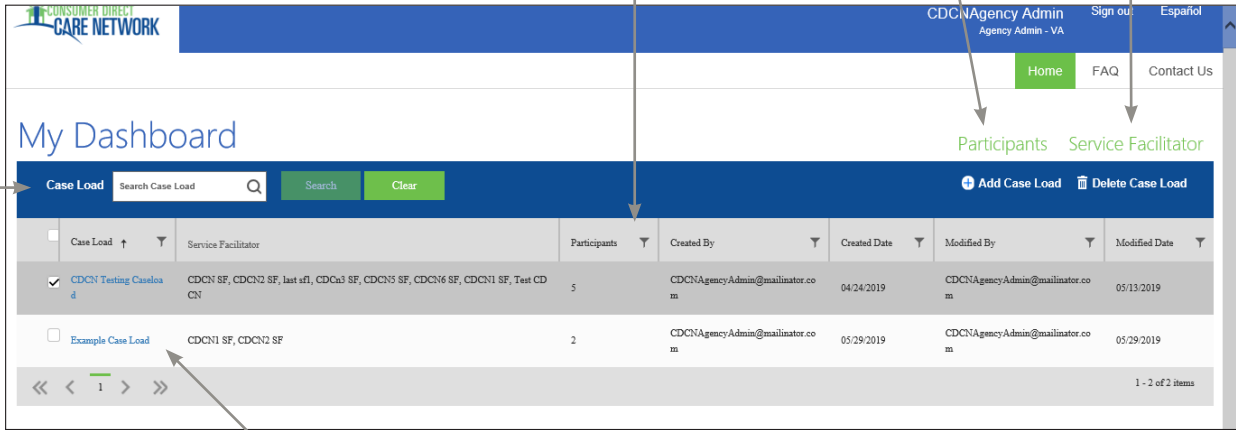
Find a case load by name.

**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.



Case Load	Service Facilitator	Participants	Created By	Created Date	Modified By	Modified Date
<input checked="" type="checkbox"/> CDCN Testing Case Load	CDCN SF, CDCN2 SF, last sfl, CDCN3 SF, CDCN5 SF, CDCN6 SF, CDCN1 SF, Test CD CN	5	CDCNAgencyAdmin@mailinator.com	04/24/2019	CDCNAgencyAdmin@mailinator.com	05/13/2019
<input type="checkbox"/> Example Case Load	CDCN1 SF, CDCN2 SF	2	CDCNAgencyAdmin@mailinator.com	05/29/2019	CDCNAgencyAdmin@mailinator.com	05/29/2019

**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:

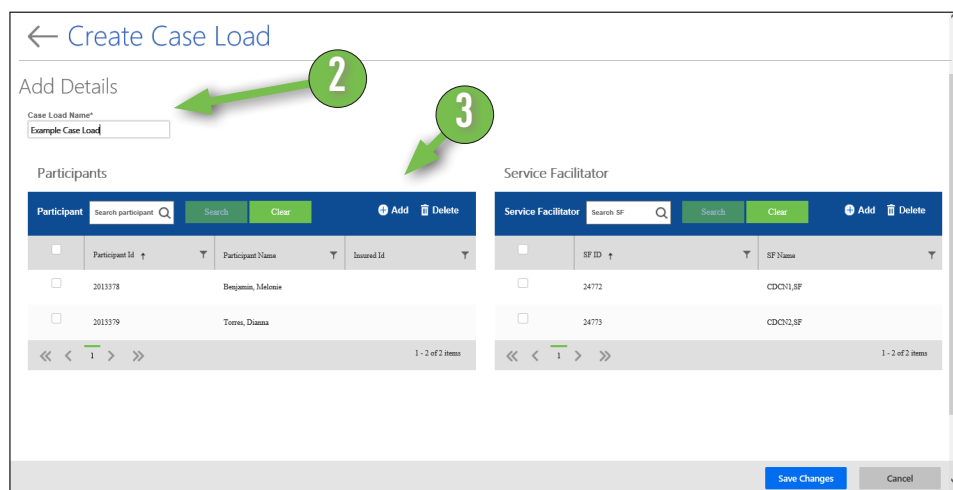
- 1 Click the **Add Case Load** button on **My Dashboard**. This opens a Create Case Load window.



- 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:



← Create Case Load

Add Details

Case Load Name\*  
Example Case Load

Participants

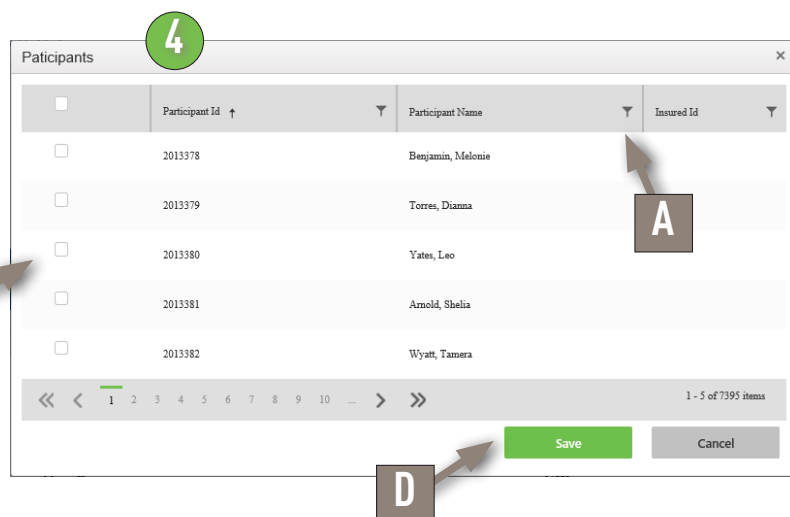
Participant	Search participant	Search	Clear	Add	Delete
<input type="checkbox"/>	Participant ID ↑	Participant Name	Insured ID		
<input type="checkbox"/>	2013378	Benjamin, Melonie			
<input type="checkbox"/>	2013379	Torres, Diana			

Service Facilitator

Service Facilitator	Search SF	Search	Clear	Add	Delete
<input type="checkbox"/>	SF ID ↑	SF Name			
<input type="checkbox"/>	24772	CDCN1,SF			
<input type="checkbox"/>	24773	CDCN2,SF			

Save Changes Cancel

- 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.



Participants

	Participant ID ↑	Participant Name	Insured ID
<input type="checkbox"/>	2013378	Benjamin, Melonie	
<input type="checkbox"/>	2013379	Torres, Diana	
<input type="checkbox"/>	2013380	Yates, Leo	
<input type="checkbox"/>	2013381	Arnold, Shelia	
<input type="checkbox"/>	2013382	Wyatt, Tamera	

Save Cancel

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.

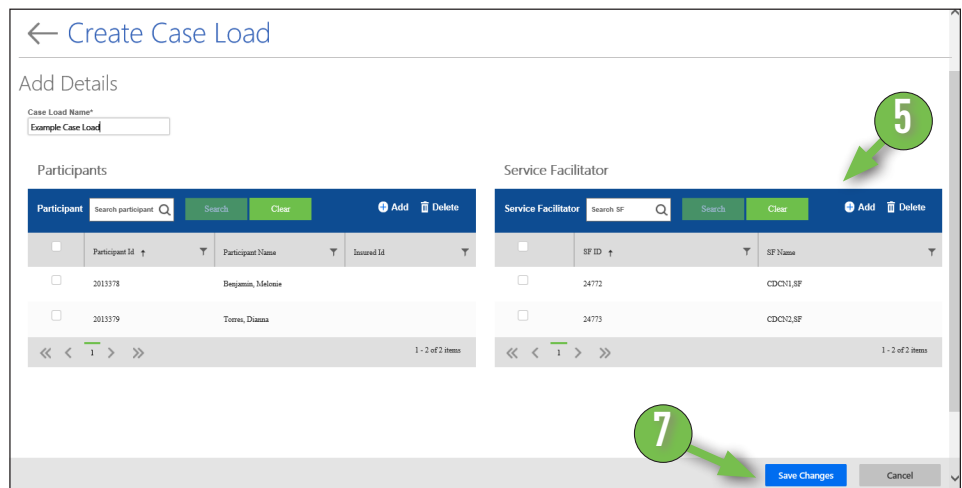
**5** Click the **Add** button in the service facilitators list. This shows a list of service facilitators.

**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.



← Create Case Load

Add Details

Case Load Name\*  
Example Case Load

Participants

Participant	Search participant	Search	Clear	Add	Delete
Participant ID	Participant Name	Insured ID			
<input type="checkbox"/>	2013378	Benjamin, Melonie			
<input type="checkbox"/>	2013379	Torres, Diana			

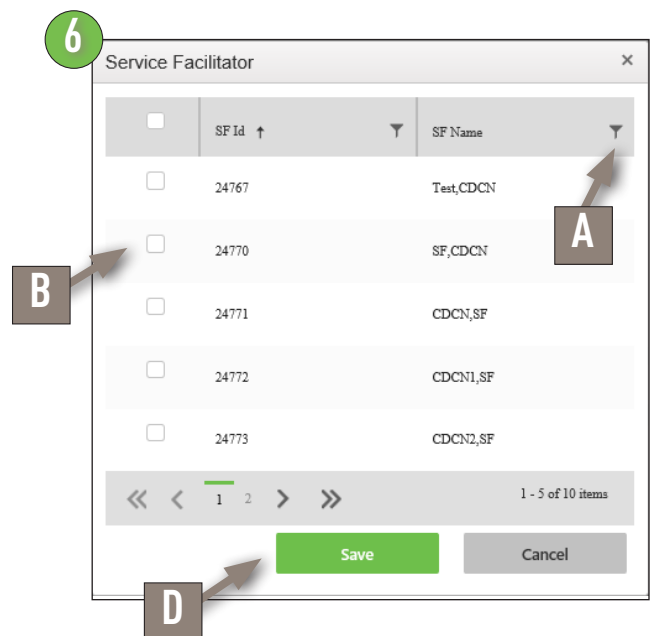
1 - 2 of 2 items

Service Facilitator

Service Facilitator	Search SF	Search	Clear	Add	Delete
SF ID	SF Name				
<input type="checkbox"/>	24772	CDCN1,SF			
<input type="checkbox"/>	24773	CDCN2,SF			

1 - 2 of 2 items

Save Changes Cancel

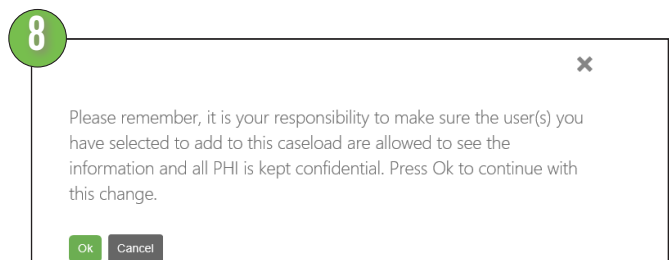


Service Facilitator

	SF ID	SF Name
<input type="checkbox"/>	24767	Test,CDCN
<input type="checkbox"/>	24770	SF,CDCN
<input type="checkbox"/>	24771	CDCN,SF
<input type="checkbox"/>	24772	CDCN1,SF
<input type="checkbox"/>	24773	CDCN2,SF

1 - 5 of 10 items

Save Cancel



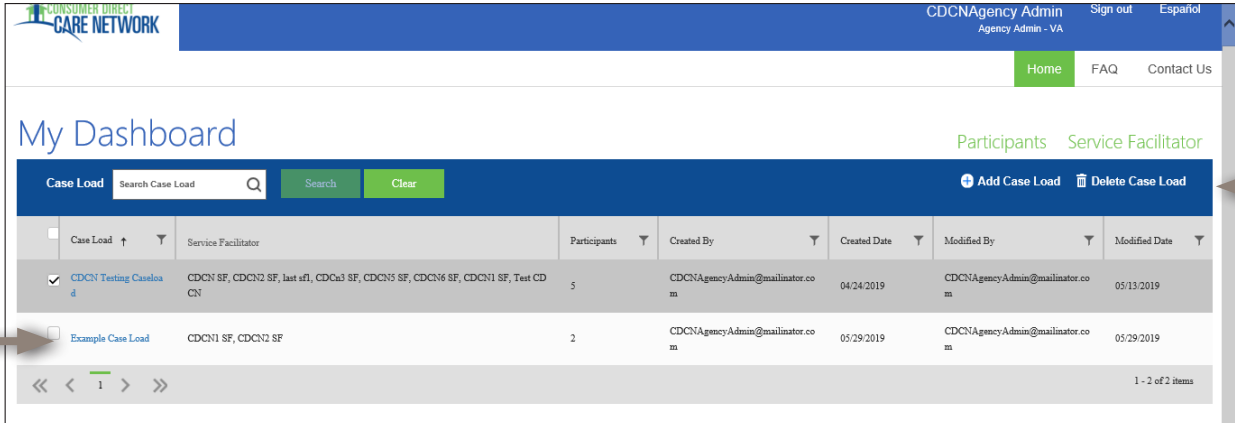
Please remember, it is your responsibility to make sure the user(s) you have selected to add to this caseload are allowed to see the information and all PHI is kept confidential. Press Ok to continue with this change.

Ok Cancel

# 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.



**My Dashboard**

Participants Service Facilitator

Case Load Search Case Load Search Clear Add Case Load Delete Case Load

Case Load	Service Facilitator	Participants	Created By	Created Date	Modified By	Modified Date
<input checked="" type="checkbox"/> CDCN Testing Case Load	CDCN SF, CDCN2 SF, last sf1, CDCn3 SF, CDCN5 SF, CDCN6 SF, CDCN1 SF, Test CDCN	5	CDCNAgencyAdmin@mailinator.com	04/24/2019	CDCNAgencyAdmin@mailinator.com	05/13/2019
<input type="checkbox"/> Example Case Load	CDCN1 SF, CDCN2 SF	2	CDCNAgencyAdmin@mailinator.com	05/29/2019	CDCNAgencyAdmin@mailinator.com	05/29/2019

1 - 2 of 2 items

## 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 <sup>(A)</sup>.

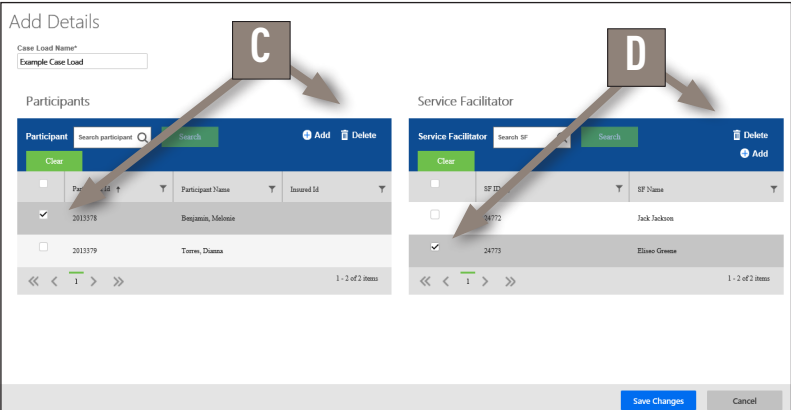
## To Add Participants or Service Facilitators to a Case Load:

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

Then click **Save Changes**.



**Add Details**

Case Load Name\* Example Case Load

Participants

Participant Search participant Search Add Delete

Participant	Participant ID	Participant Name	Insured ID
<input checked="" type="checkbox"/>	2013378	Bergman, Melissa	
<input type="checkbox"/>	2013379	Torne, Diana	

1 - 2 of 2 items

Service Facilitator

Service Facilitator Search SF Search Delete Add

Service Facilitator	SF ID	SF Name
<input type="checkbox"/>	24772	Jack Jackson
<input checked="" type="checkbox"/>	24773	Elisee Greene

1 - 2 of 2 items

Save Changes Cancel

# 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**).

Show items with value that:

Contains

Filter Clear

### Search

Find a participant by name CDCN ID.

### Sort

You can sort any column by clicking its title.

## My Participant Dashboard

Search Participant ID/Name <input type="text"/> Search Clear				
Participant Id ↑	Participant	Insured Id	Case Load	Service Facilitator
2013378	Benjamin, Melonie		Example Case Load	CDCN1,SF, CDCN2,SF
2013379	Torres, Dianna		Example Case Load	CDCN1,SF, CDCN2,SF
2013386	Kirk, Simone			
2013387	Hayes, Lucinda			
<< < 1 2 3 4 5 6 7 8 9 10 ... > >> 1 - 10 of 7400 items				

### 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.

# 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

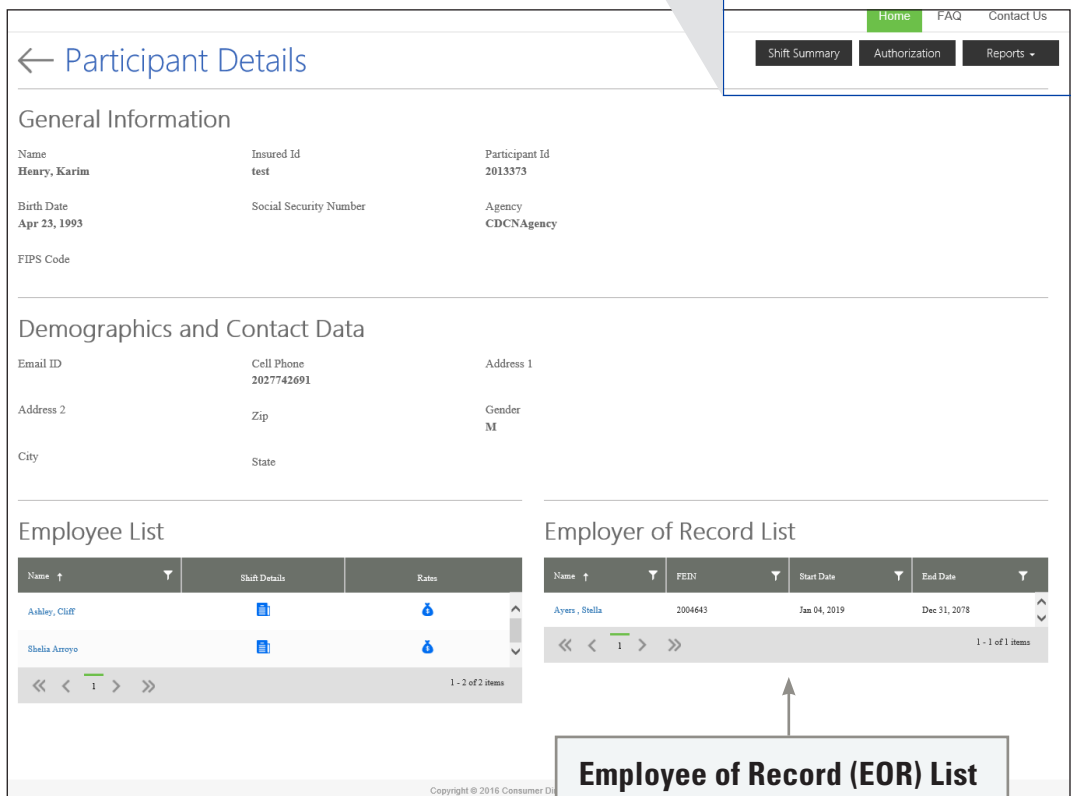
Such as name, CDCN ID, Birthdate, Insured ID.

### 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).



**Participant Details**





General Information

Name <b>Henry, Karim</b>	Insured Id test	Participant Id 2013373
Birth Date Apr 23, 1993	Social Security Number	Agency CDCNAgency
FIPS Code		

Demographics and Contact Data

Email ID	Cell Phone 2027742691	Address 1
Address 2	Zip	Gender M
City	State	

Employee List

Name	Shift Details	Rates
Ashley, Cliff		
Shelia Amoye		

1 - 2 of 2 items

Employer of Record List

Name	FEIN	Start Date	End Date
Ayers, Stella	2004643	Jan 04, 2019	Dec 31, 2078

1 - 1 of 1 items

### 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.

Employee List

Name ↑	Shift Details	Rates
Ashley, Cliff		
Shelia Arroyo		

1 - 2 of 2 items

## Employee Details (A)

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

← Employee Details

General Information

Name Ashley, Cliff	Employee ID 201045100	Date of Birth Apr 01, 1979
Social Security Number 262413310	Hire Date Jun 01, 2007	

Demographics and Contact Data

Email ID	Cellphone 7572331413	Address 1 408 South Rocky Old Boulevard
Address 2	Zip 23456	
City VIRGINIA BEACH	State	

## Employee Rate (B)

Shows the Employee's pay rates by Service Code.

Customer Employee Rate

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

1 - 2 of 2 items

## 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).

Participant Name: Livingston, Ava Employee Name: McCall, Graciela

Start Date: 04/29/2019 End Date: 05/29/2019 Search Clear

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 of Record List			
Name ↑	FEIN	Start Date	End Date
Ayers, Stella	2004643	Jan 04, 2019	Dec 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.



[← Employer Details](#)

General Information

Name

Ayers, Stella

Employee ID

2004643

FEIN

2004643

Social Security Number

335167207

Demographics and Contact Data

Email ID

Cell Phone

Address 1

5408458028

629 South White Old Boulevard

Address 2

ZIP

24450

City

State

LEXINGTON

Virginia

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# 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

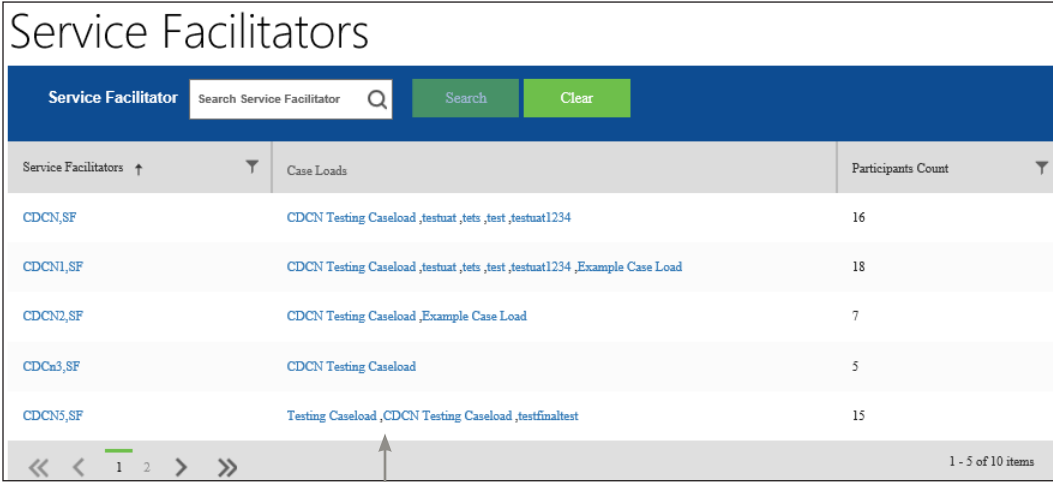
The Service Facilitators screen lists all service facilitators, the case loads they belong to, and how many participants the SF can see in the Portal. Note that you can filter and sort some columns just like in My Dashboard.

**Service Facilitator**

See more about the service facilitator.

**Case Loads**

Open a Case Load for editing.



The screenshot shows the 'Service Facilitators' screen with a table listing facilitators and their case loads. Callouts point to the 'Service Facilitator' column header and a specific case load entry.

Service Facilitator	Case Loads	Participants Count
CDCN,SF	CDCN Testing Caseload ,testuat ,ets ,test ,testuat1234	16
CDCN1,SF	CDCN Testing Caseload ,testuat ,ets ,test ,testuat1234 ,Example Case Load	18
CDCN2,SF	CDCN Testing Caseload ,Example Case Load	7
CDCN3,SF	CDCN Testing Caseload	5
CDCN5,SF	Testing Caseload ,CDCN Testing Caseload ,testfinaltest	15

## 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.

←

### Service Facilitator Details

---

**General Information**

Name <b>Cameron,Steve</b>	Agency <b>TestAgency</b>
------------------------------	-----------------------------

---

**Demographics and Contact Data**

Email ID <b>SFCDM@mailinator.com</b>	Cell Phone	Address 1 <b>608 East Fabien Street</b>
Address 2	Zip <b>23320</b>	
City <b>CHESAPEAKE</b>	State <b>Virginia</b>	

# 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

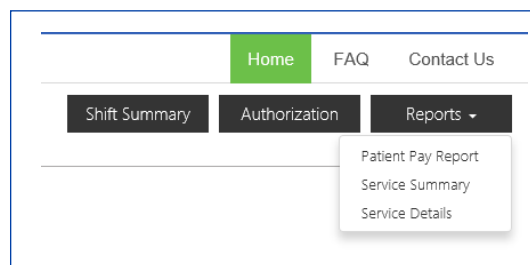
If the Participant is required to pay a portion of their care services, this report shows how those funds are used.

## 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.

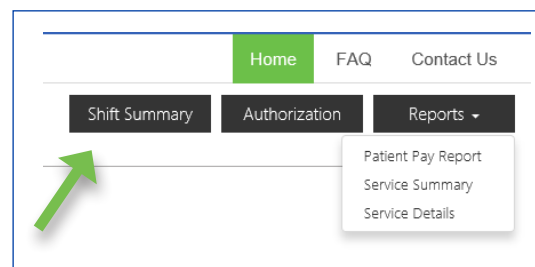


**Coming Soon!**

# 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.

← Shift Summary

Participant Name: Livingston, Ava

Start Date 
End Date

Employee Name	Employee ID	Service Code	Service Date	Time In	Time Out	Hours	Check Number	Check Amount	Paid Date	Source	Status
Rhodes, Cornell	2021514	SS126	05/09/2019	12:00:00 AM	12:05:00 AM	0.08	N/A	\$0.00		Web Portal	Saved
Rhodes, Cornell	2021514	SS126	05/10/2019	12:00:00 AM	12:15:00 AM	0.25	N/A	\$0.00		Web Portal	Saved
Rhodes, Cornell	2021514	SS126	05/01/2019	8:00:00 AM	9:00:00 AM	1.0	N/A	\$0.00		Web Portal	Saved
Rhodes, Cornell	2021514	SS126	05/01/2019	9:00:00 AM	10:00:00 AM	1.0	N/A	\$0.00		Web Portal	Saved
McCall, Graciela	2035158	SS126	05/01/2019	8:00:00 AM	9:00:00 AM	1.0	N/A	\$0.00		Web Portal	Submitted

«
<
1
2
3
>
»

1 - 5 of 14 items

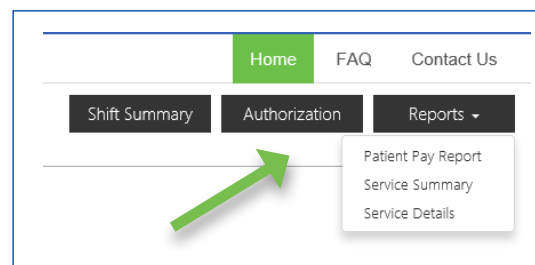
**Navigate Results**

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.

Authorizations Dashboard

Search

Client ID/Name/Agreement No.

Start Date

End Date

Search

Clear

>	ACN	Agreement No.	Client ID	Client Name	Date of Birth	Provider	Start Date	End Date	Status
▼	ACN2019071AU700070	006863	2013373	Henry, Karim	04/23/1993	VADMASNORTH	04/23/2019	04/24/2019	Active
Service Code	Start Date	End Date	Authorization no.	Status					
85150	04/23/2019	04/24/2019		Active					

>

ACN2019114AU7000001

2013373

Henry, Karim

04/23/1993

VADMASNORTH

Inactive

<<

<

1

>

>>

1 - 2 of 2 items

Agreement Details

Authorization Summary

Back

Client Name	Client ID	DOB
Ava Alanna Livingston	2020336	01/01/1989
Provider	Program	Sub Account
VADMASNORTH	LTB	FEAMCDDMSRCCROS
Agreement No.	Diagnosis Code	Start Date
006866	V61.03	05/01/2019
Status	External Case Manager	End Date
Active		12/31/2019

Service Summary

Service	S5126	Budget Amount	500000	Reserved Amount		Remaining Amount	500000	Spent Amount		Refresh		
Service/History	Description	Start Date	End Date	Authorization no.	Status	Hours	Bill Units	Unit Range	Range Units	Budget Amount	Amount Range	PM/PM
S5126	Attendant	05/01/2019	12/31/2019		Active	500000	500000	Daily	2040.82	0		No

# 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.

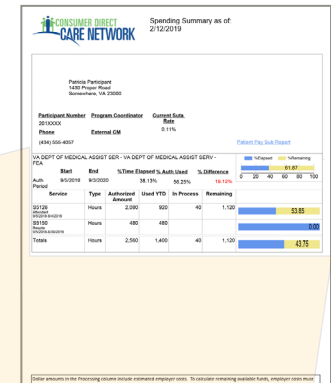
**Coming Soon!**

# 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.



<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		<a href="#">Patient Pay Sub Report</a>

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%		

Service	Type	Authorized Amount	Used YTD	In Process	Remaining	
S5126 Attendant 9/5/2018-9/4/2019	Hours	2,080	920	40	1,120	<div><div></div><div>53.85</div></div>
S5150 Respite 9/5/2018-6/30/2019	Hours	480	480			<div><div></div><div>0.00</div></div>
Totals	Hours	2,560	1,400	40	1,120	<div><div></div><div>43.75</div></div>

## 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.