AHCA Behavior Analysis

Electronic Visit Verification

Tellus eVV Administrator Console and Scheduler

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Agenda

1. What is EVV
2. How Does EVV Work
3. AHCA BA EVV Pilot
4. Training Objectives
5. Tellus eVV Solution
6. Claims Processing Timeline & Controls
7. Claims Demo
8. Pay and Post Edit
9. Payment Policy Information
10. Timeline for EVV
11. Need Help?

What is EVV?

Technology system required by Florida's Agency for Health Care Administration (AHCA) for Behavior Analysis beginning 10/1/2019:

- **Accurately verifies visit activity** and services delivered.
- **Provides transparency** via real-time data to improve client outcomes, operational efficiencies, and program integrity.
- **Reduces Medicaid fraud, waste, and abuse.**
- Helps ensure approved services are **provided on time.**

The EVV System captures the following information:

- **Time service begins and ends.**
- **Date of service.**
- **Location of service.**
- **Name of individual receiving service.**
- **Name of individual providing service.**
- **Type of service.**

AHCA Florida

- The AHCA BA EVV program will be implemented as a pilot project.
- The pilot is scheduled for dates of service on or after 10/1/2019.
- The pilot consists of ***recipients with a home address*** in the three pilot regions (9,10, and 11) for reimbursement of Behavior Analysis services (see service code list) in the counties of Miami-Dade, Monroe, Broward, Indian River, Okeechobee, St. Lucie, Martin, and Palm Beach.

Benefits of EVV

Reduced Fraud, Waste, and Abuse

Greater Transparency

Improved Care Outcomes

How Does EVV Work?

- EVV is a technology that electronically verifies when and where care is rendered.
- The **free application** is enabled with Global Positioning System (GPS) technology.
  - GPS coordinates are recorded only at the start time of a visit (check in) and end time of a visit (check out) — the provider's movements are not tracked.
  - GPS uses satellite technology and does not rely on cell or Wi-Fi service availability.
  - The EVV system works in an offline mode, allowing check in and check out data (which is encrypted) to be transmitted once the smart device is back in cellular or Wi-Fi range.
- EVV requires the rendering provider to check in and check out using a **smartphone application/tablet** each time a visit begins and ends. (If you primarily deliver services within a Center setting, the System Administrator may administer the check in and check out process via pc/laptop.)
- The EVV system **links the electronic record** of provider check in and check out with the prior authorization details for claim submission — ensuring submitted claim information is valid and matches the prior authorization information.

AHCA BA EVV Pilot

- The pilot encompasses dates of service beginning 10/1/2019.

- The pilot will be implemented for recipients with a home address within the three pilot regions (9,10,11) for reimbursement of Behavior Analysis services (below) in the counties of Miami-Dade, Monroe, Broward, Indian River, Okeechobee, St. Lucie, Martin and Palm Beach.

HCPCS	Mod I	Mod II	Description
H2012	BA		Behavior Health Day Treatment
H2014	BA		Skills Training and Development (Specialties 390 and 392)
H2014	BA	GK	Skills Training and Development (Specialties 390,391, and 392)
H2019	BA		Therapeutic Behavioral Services

AHCA Florida

The EVV System captures the following information:

- Date of Service
- Location of Service
- Individual receiving service
- Name of individual providing service
- Type of service
- Time the service begins and ends

Benefits of EVV

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What is EVV?

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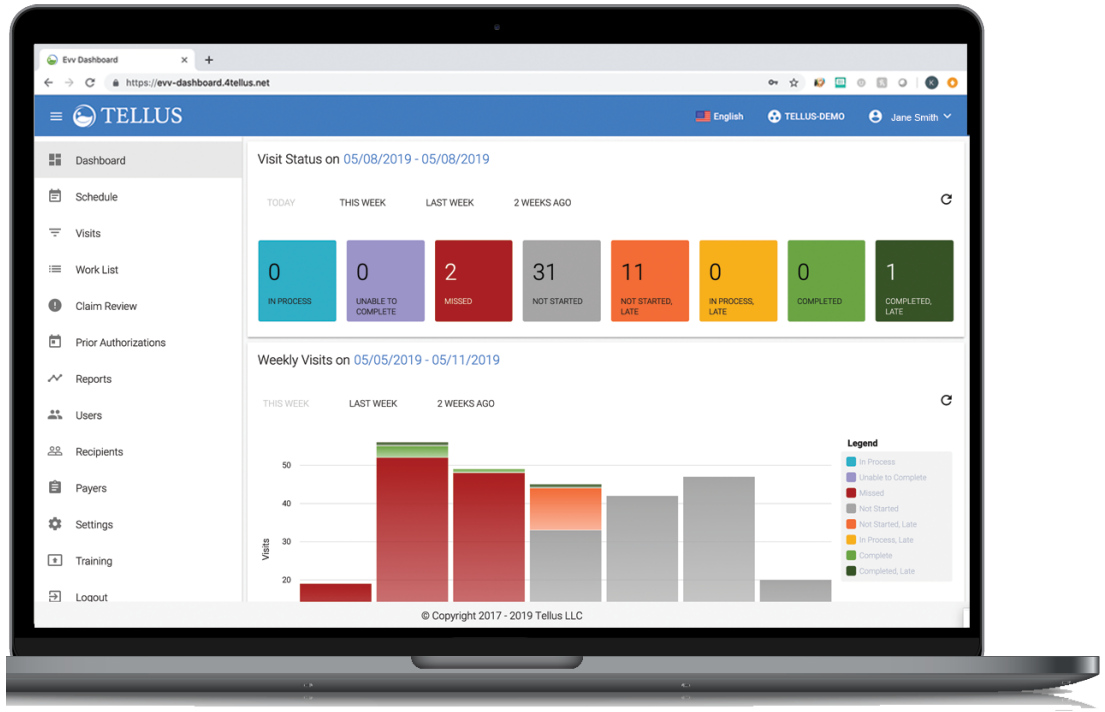
Claims Processing Timelines & Controls

The Tellus **system creates the claim,** the provider remediates the claim if necessary, and marks the claim for submission.

The Tellus system transmits the claim to FMMIS for adjudication and payment.

The payment cycle remains the same as it is today.

Training Objectives



At the end of the training participants will be able to…

- **Log In & Log Out.**
- **Navigate the Dashboard.**
- **Create a Schedule.**
- **View real-time Visit Data.**
- **Review billable Visit Data.**
- **Managing Users.**
- **Receiving Messages from Users.**
- **Locate Online User Guides.**

The Tellus eVV Solution

- **Administrator Console**
  - Scheduling
  - Real-time Visit Data
  - Reporting
- **Mobile Application**
  - Easy Navigation
  - Scheduling New Visits
  - Viewing Provider Schedules
  - Start and Complete Visits
  - Capture Signatures
- **Claims Submission**
  - Prior Authorizations
  - Real-time Claims Status
  - Claims Editing and Release for Payment

The Timeline for EVV

✓ Orientation Sessions #1 and #2 (May and June, training materials available on website at the bottom of the Training and Registration tab)

- **Enroll in training** sessions for July/August/September.
  - **System Administrators / Lead Analysts to enroll in training** sessions for July/August/September.
    - ✓ **Tellus eVV Administrator Console and Scheduler (90 minutes)**
    - **Tellus eVV Claims Console (60 minutes)**
  - Providers **(Users) to enroll in training** session during July/August/September.
    - **Tellus eVV Mobile Application (60 minutes)**
- **System Administrators register their Group with Tellus** (see Orientation #2 slides – How to Register with Tellus)
- **Users will be invited** to the Tellus System once the Providers are loaded from the AHCA file and System Administrators utilize “Reset Password” command (see System Administrator To Do training materials).
- **System Administrators can begin to schedule initial visits soon** via the EVV System Administrator Console in advance of services to be delivered on or after 10/1/2019.
- Once initial visits are scheduled, pairing Provider with appropriate Recipients, Providers can begin to schedule initial visits via mobile device in advance of services to be delivered on or after 10/1/2019.

Who Needs to Register with Tellus?

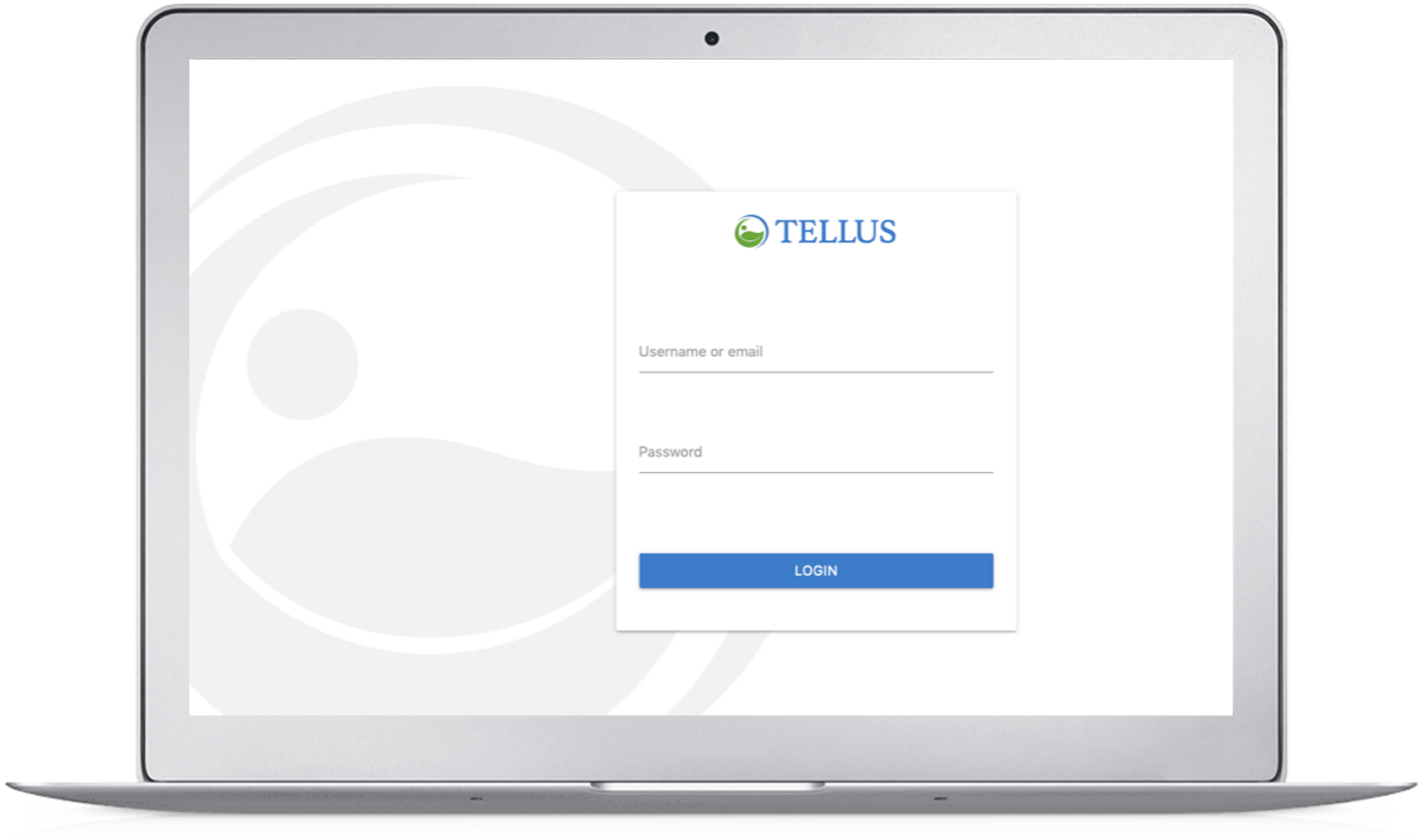
- **One** person per Group (Tellus refers to this person as the initial System Administrator).
- **Lead Analysts** who submit their own claims directly for payment must also register as a System Administrator.
- See complete instructions on How to Register in the June Orientation #2 slides available on the Tellus website.

EVV System Administrator To-Do List When Scheduling is Available

System Administrator (including Lead Analysts that submit their own claims):

1. Will need to link Providers/Users to their BA Group.
    - This process will send each Provider/User their user name and temporary password.
2. Will need to enter additional addresses to recipient records if visits to occur at locations other than the recipient's home address.
3. Will need to schedule the first visit for each Provider/Recipient pairing. Future visits can then be scheduled by each provider for (only) their paired recipients.

Administrator Console



Once the registration process is complete and Users and Recipients are made available in the Tellus eVV System, visits can be scheduled for dates of service 10/1/2019.

Tellus Minimum System Requirements:

Supported PC Operating Systems	Windows OS (32 or 64 bit) Version 7 or higher Mac OS Version X (10) or higher
Supported Mobile Operating Systems	iOS Version 8 or higher Android Version Lollipop (5.0) or higher
Supported PC & Mac Browsers	Microsoft Internet Explorer Version 11 or higher Microsoft Edge Version 16 or higher Google Chrome Version 4 or higher Apple Safari Version 10 (Mac)/4 (Windows) or higher Mozilla Firefox Version 57 or higher
Supported Mobile Browsers:	Google Chrome Version 4 or higher on Android Apple Safari Version 10 (Mac)/4 (Windows) or higher
Mobile Device Requirements	Operating System: Android or iOS (see above) Bluetooth required: No GPS required: Yes Voice support required: No Min memory of phone: 25 MB Min storage of phone: 50 MB

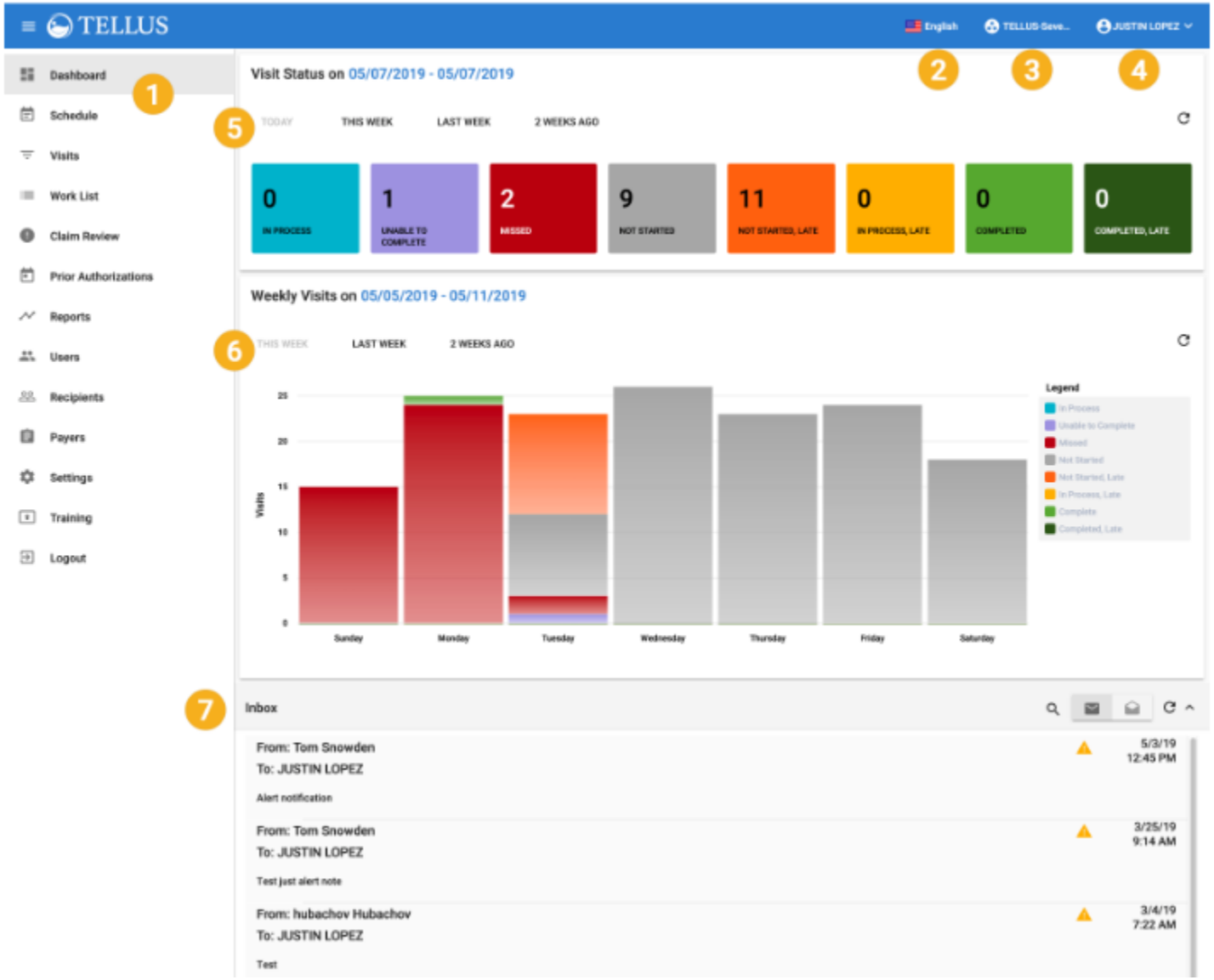
Viewing the Menu

The **Main Menu** appears in the left-hand margin of the page. You can expand the **Main Menu** to see the full list of menu options by clicking the **Main Menu** icon, sometimes called the “hamburger icon,” on the far left-hand side of the Tellus eVV Console. Click the icon to expand the **Main Menu**. Click the icon again to condense the **Main Menu**.

The **Main Menu** provides access to many different features.

Menu Item	Description
Dashboard	Takes you back to the Console Home page.
Schedule	Allows you to view and manage Provider Schedules.
Visits	Allows you to view and manage visits.
Work List	Allows you to search and review visits.
Claim Review	Takes you to the Claims Console where you can view and manage claims.
Prior Authorizations	Allows you to search and review Prior Authorizations.
Reports	Allows you to view and print pre-defined or ad-hoc reports.
Users	Allows you to view and manage Users and their roles.
Recipients	Allows you to view and manage Recipients.
Payers	Allows you to view and manage the payer and tasks associated to Services.
Settings	Allows you to personalize your Console settings.
Training	Takes you to the Training and Support Center for access to User Guides, FAQs, video tutorials, and other training materials.
Logout	Logs you out of the Console.

Administrator Console View



The Tellus eVV Administrator Console displays a snapshot view of real-time data. The default Administrator Console view:

1. Has a Main Menu that provides access to other areas in the Console and allows you to customize viewable data. See Viewing the Menu for more information on the menu options.

2. Allows you to select your language preference: *English* or *Spanish*.

3. Displays the agency name. If you work with multiple agencies, you can easily toggle between agencies by clicking the agency name and selecting another agency from the drop-down list.

4. Displays your user name.

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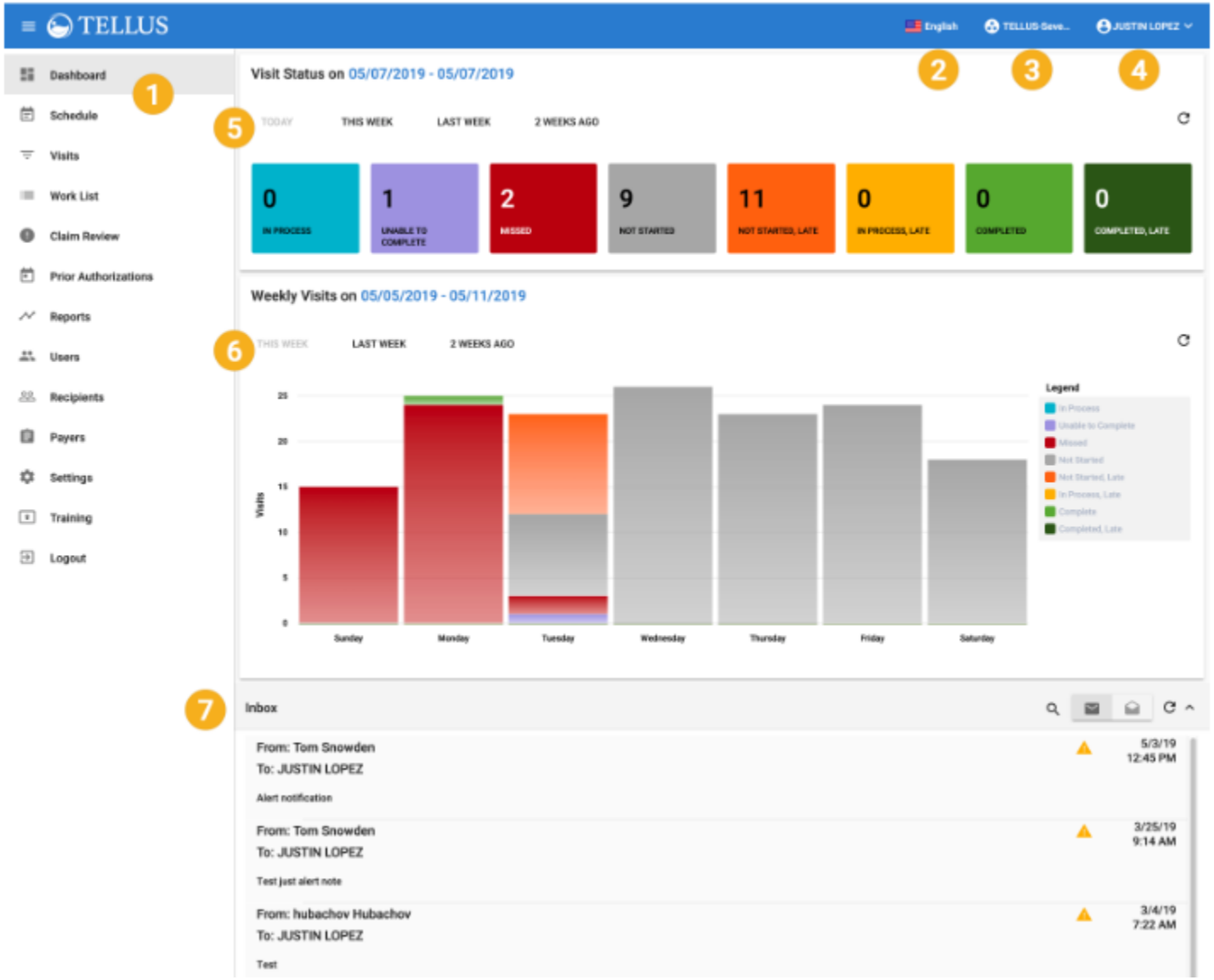
Administrator Console View



The default Administrator Console view:

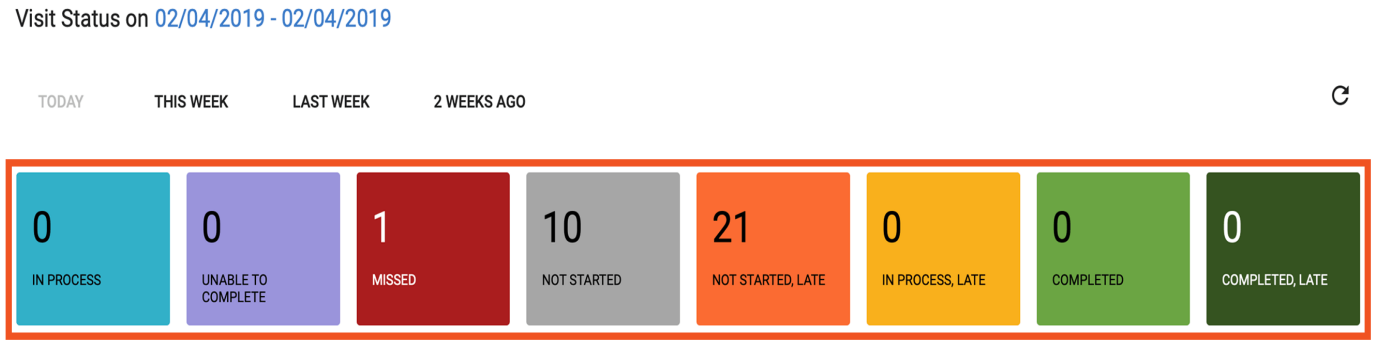
5. Gives you an overview of Today's Visit Status. You can also select to view *This Week, Last Week* or *2 Weeks Ago*.

6. Displays an overview of Weekly Visits. You can select to view *Last Week* or *2 Weeks Ago*.

7. Displays your inbox. This is where you will receive alert messages sent from Providers in the field. You can send messages to Providers on the Users page.

Administrator Console View - Viewing Visit Status

The ***Visit Status*** panel is located below the banner on the Tellus eVV Administrator Console.



The ***Visit Status*** panel contains eight tiles for the following categories:

VISIT STATUS	DESCRIPTION
In Process visits	The total number of visits currently in process.
Unable to Complete visits	The total number of visits that the Providers were unable to complete for the period.
Missed visits	The total number of missed visits for the period.
Not Started visits	The total number of visits not started yet for the period.
Not Started, Late visits	The total number of visits that are not started, and late, for the period.
In Process, Late visits	The total number of visits that are in progress, but late, for the period.
Completed visits	The total number of visits that were completed as scheduled for the period.
Completed, Late visits	The total number of visits that are completed, but late, for the period.

You can drill down on each status for more detail by clicking the tile. You can also click to change the view of the *Visit Status* to show:

1. Today (default)
2. The current week (*This week*)
3. The previous week (*Last week*)
4. Two weeks ago

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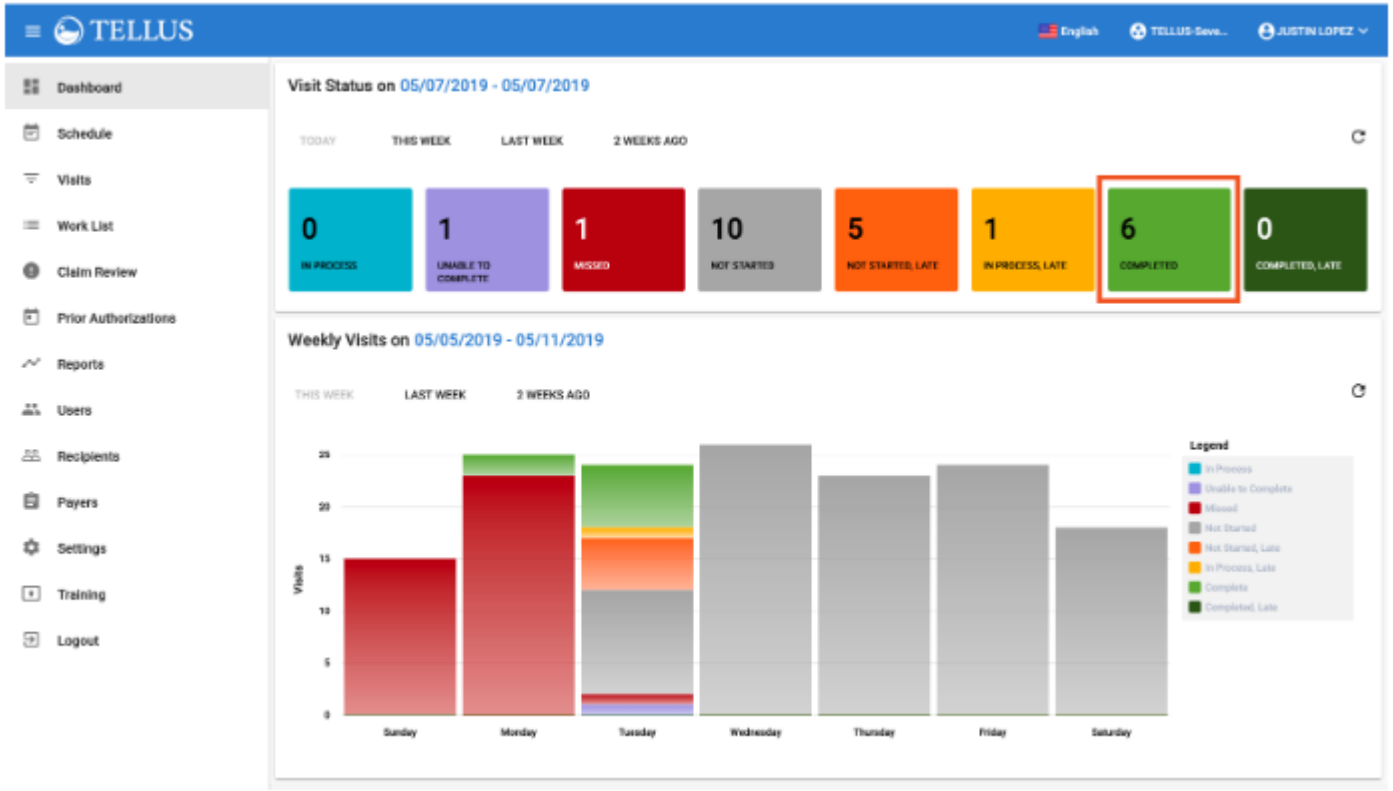
Administrator Console View - Viewing Visit Status

You can click any of the status detail tiles on the Tellus eVV Administrator Console to view additional details about those visits during the specified time period. For example, on the screen below the ***Visit Status*** panel shows the status for **Today**. You can click the ***Completed*** tile to see the details for all of the ***Completed*** visits for **Today**:



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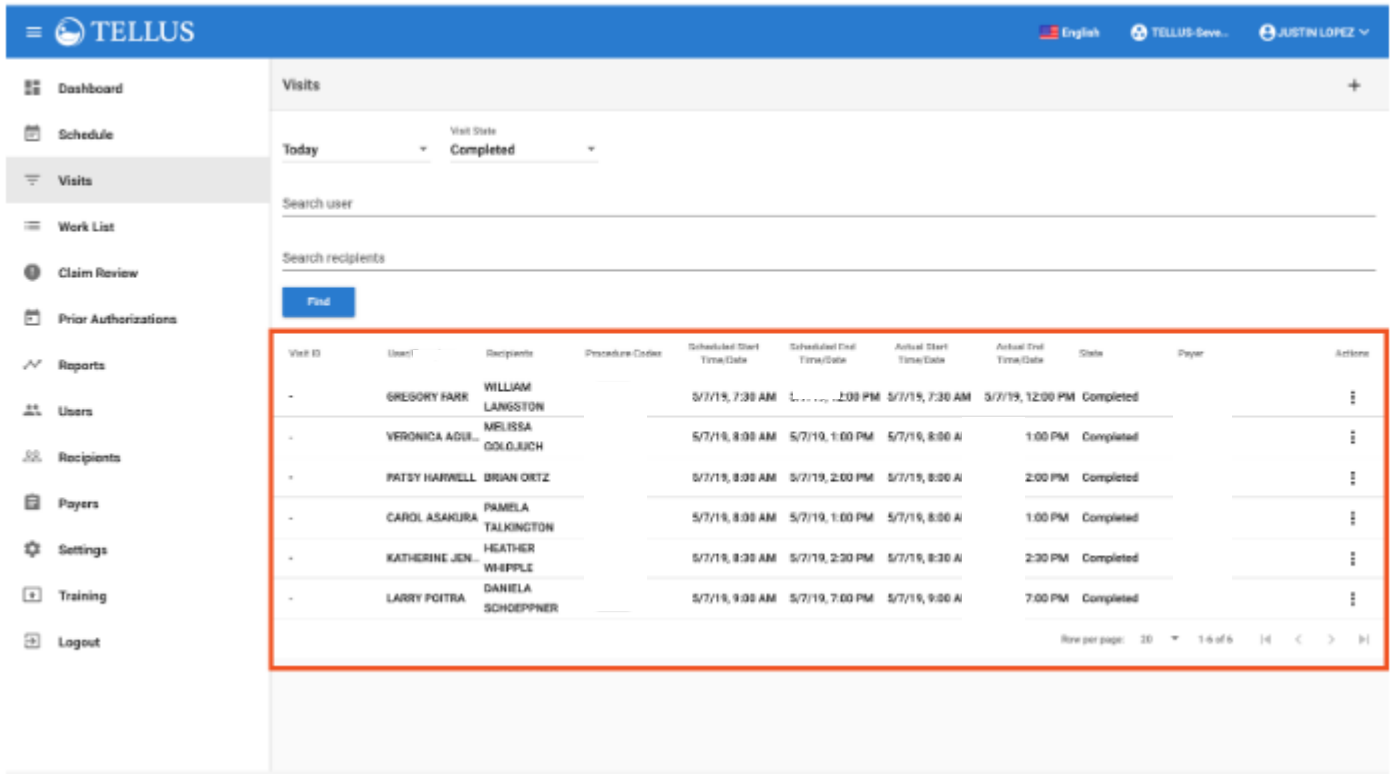
Administrator Console View - Viewing Visit Status Detail



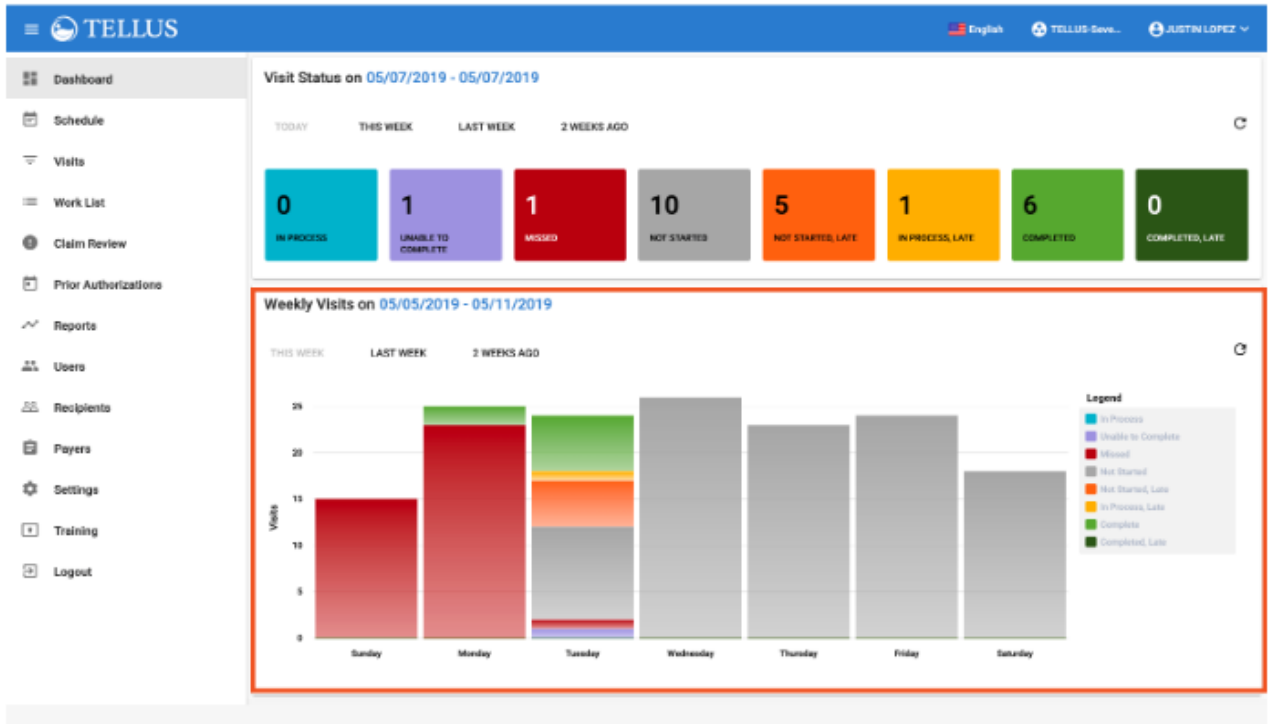
You will be presented with all the ***Completed*** visits for this Tuesday.

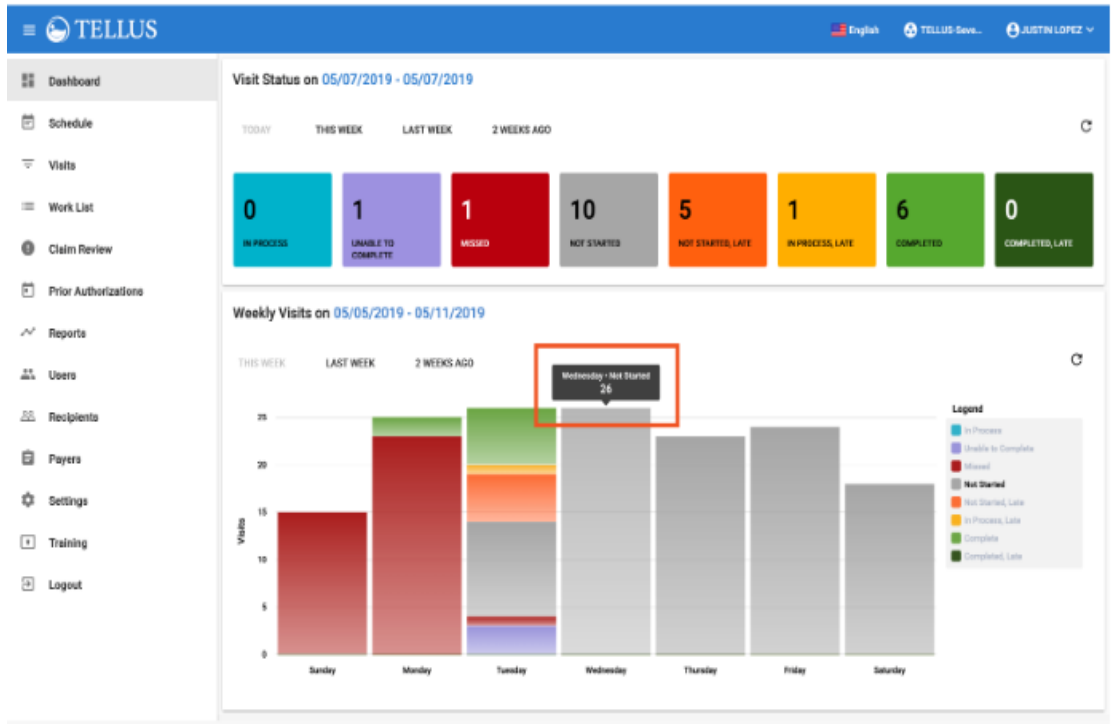
This process is the same for *In Process*, *Unable to Complete*, *Missed*, *Not Started*, *Not Started-Late*, *In Process, Late*, *Completed*, and *Completed, Late* Status. You will see the detail screen for those specific status when you click those tiles.
The same is true for the different time periods (*This week*, *Last week*, *2 weeks ago*). You will see the detail screen for the specific status during the selected time period.

Administrator Console View - Viewing Weekly Visits

The ***Weekly Visits*** panel on the Tellus eVV Administrator Console is displayed below the ***Visit Status*** panel. The ***Weekly Visits*** panel graphically displays the number of scheduled visits by day for the current week. A color-coded ***Legend*** is to the right of the graph.

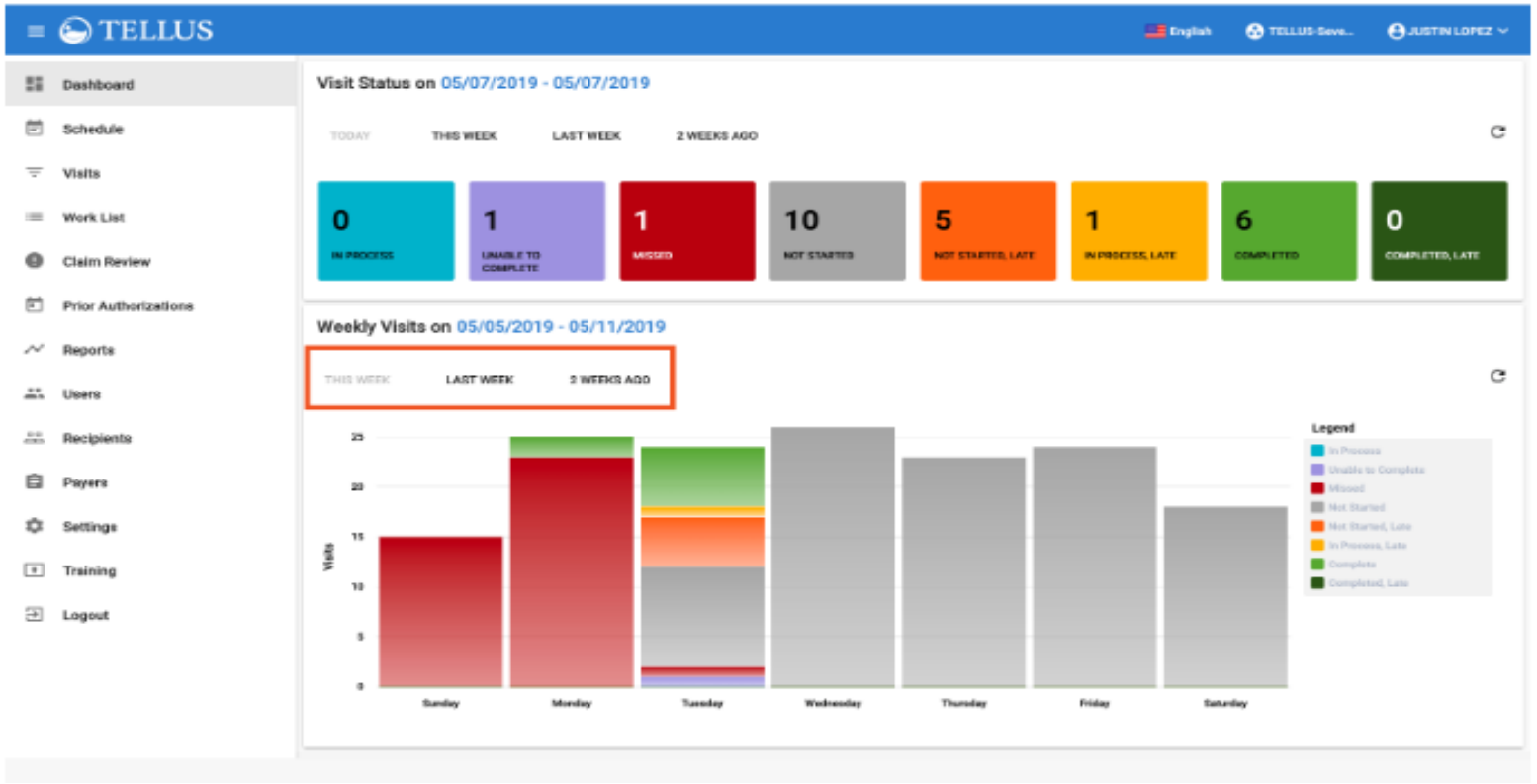
The ***Weekly Visits*** bar chart displays the total number of visits by day. If you hover your mouse over a section of the graph, you will see the specific count of visits.





Administrator Console View - Viewing Weekly Visits

By clicking the tabs, you can view ***Visit Status*** for:
1. The current week ***(This week)***
2. The previous week ***(Last week)***
3. Two weeks ago ***(2 weeks ago)***



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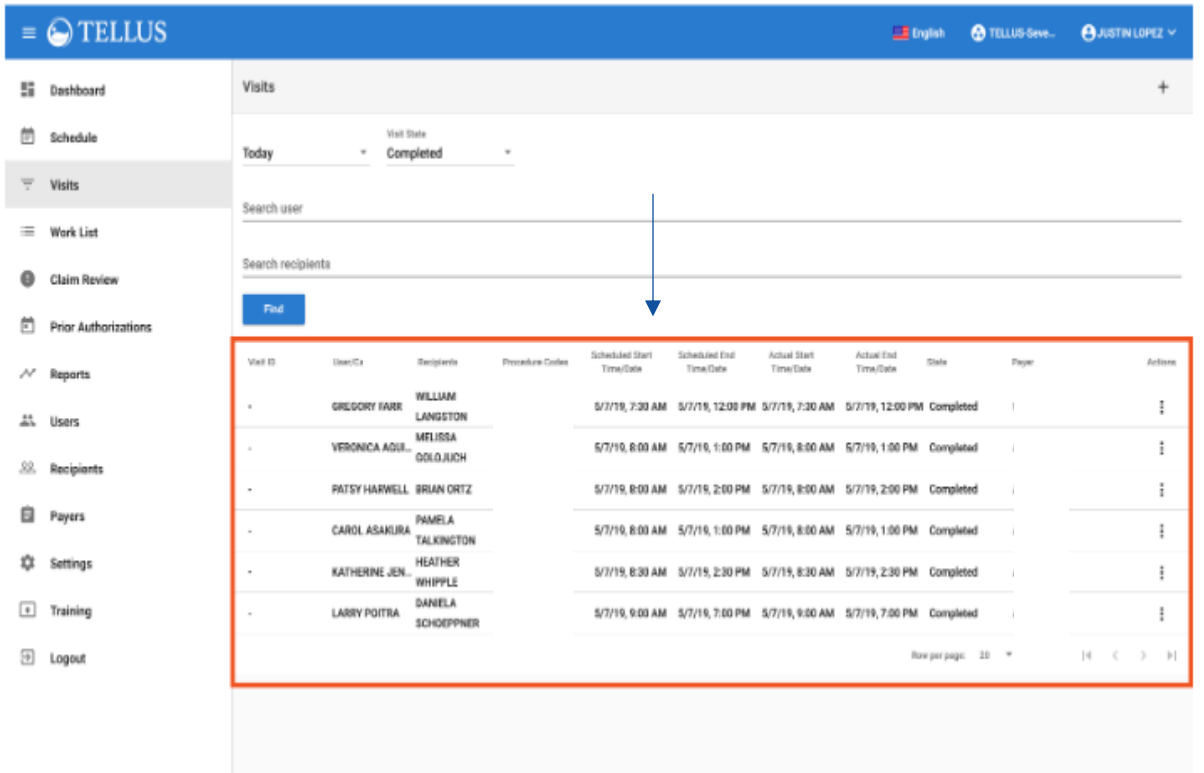
Administrator Console View - Viewing Weekly Visit Detail

You can click any of the color-coded areas on the ***Weekly Visits*** panel to view additional details about those visits during the specified time period. For example, in the screen below the ***Weekly Visits*** panel shows the statuses for This Week. You could click the ***Completed*** box for Tuesday:

You will be presented with all the ***Completed*** visits for Tuesday:



This process is the same for *In Process*, *Unable to Complete*, *Missed*, *Not Started*, *Not Started-Late*, *In Process, Late*, *Completed*, and *Completed, Late* Status. You will see the detail screen for those specific status when you click those tiles.

The same is true for the different time periods (*This week*, *Last week*, *2 weeks ago*). You will see the detail screen for the specific status during the selected time period.

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Administrator Console View - Viewing Inbox Alerts

Figure A

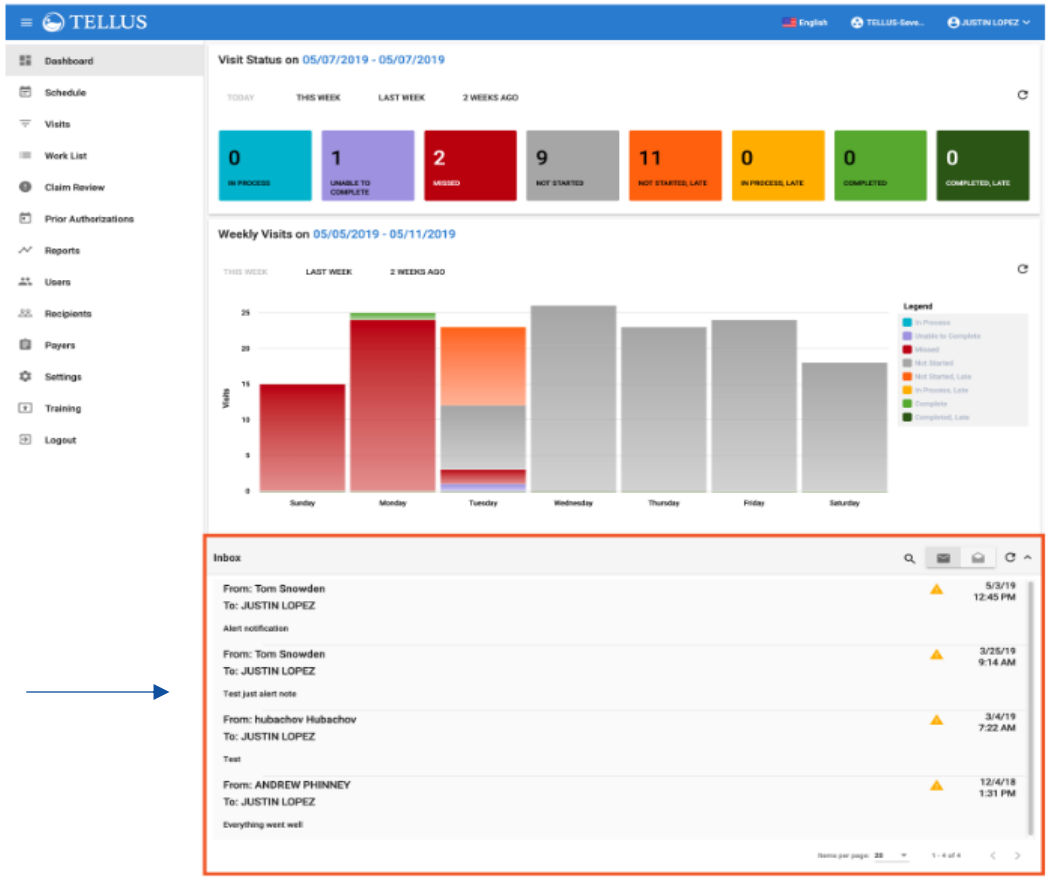
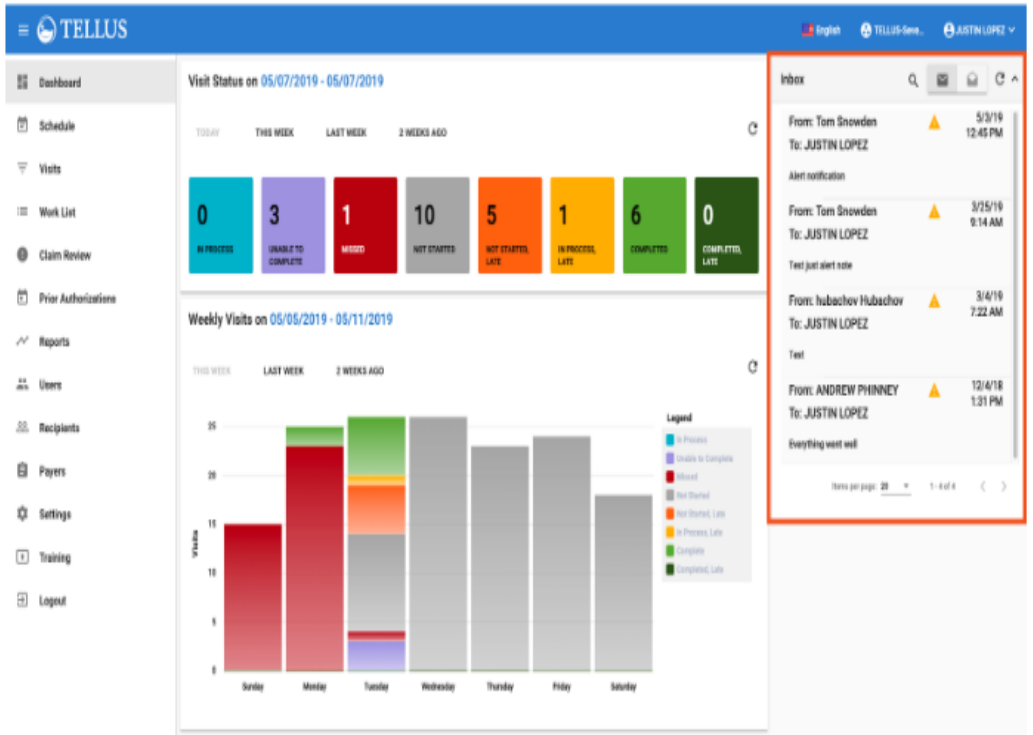


Figure B



The ***Inbox*** panel on the Tellus eVV Administrator Console is displayed either below the ***Weekly Visit Status*** panel (Figure A) or on the right side of the page (Figure B), depending on your browser's window size. If a Provider in the field marks a note to ***Alert My Administrator***, the note will appear in the ***Inbox***. Click the note to read the full text.

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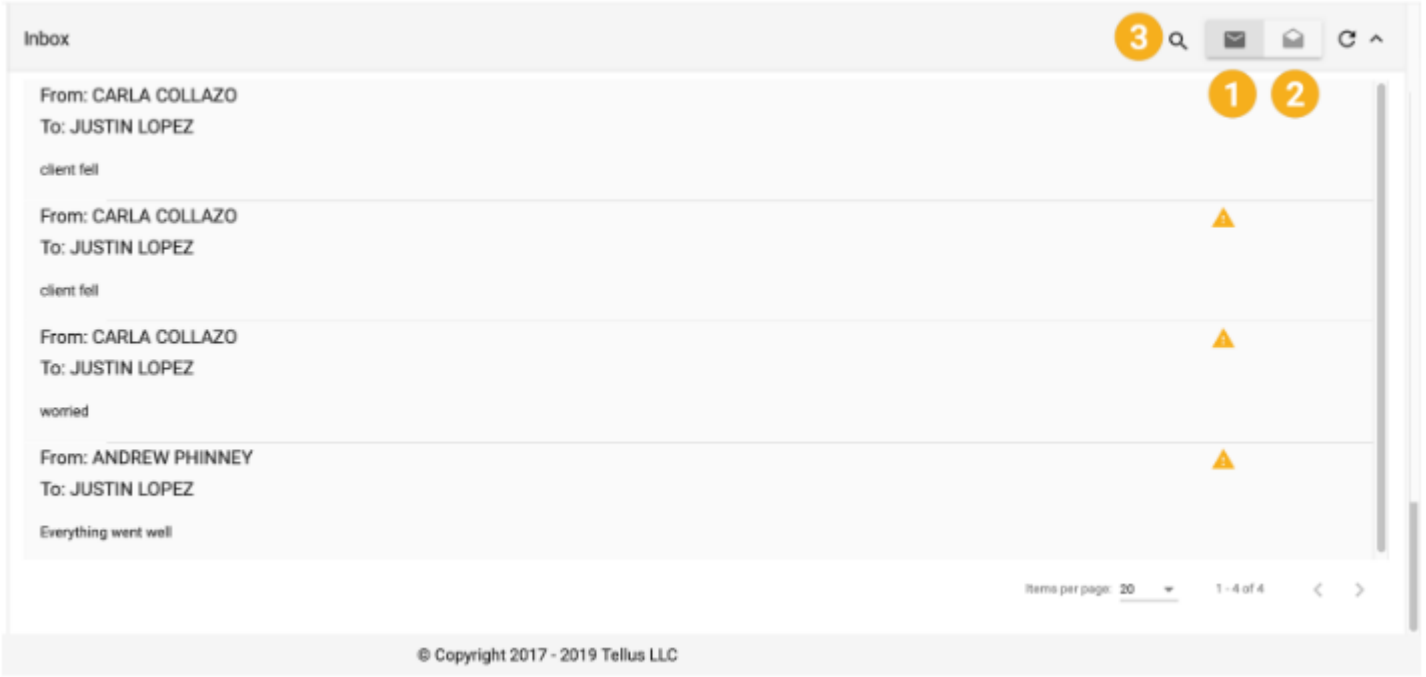
Administrator Console View - Viewing Inbox Alerts



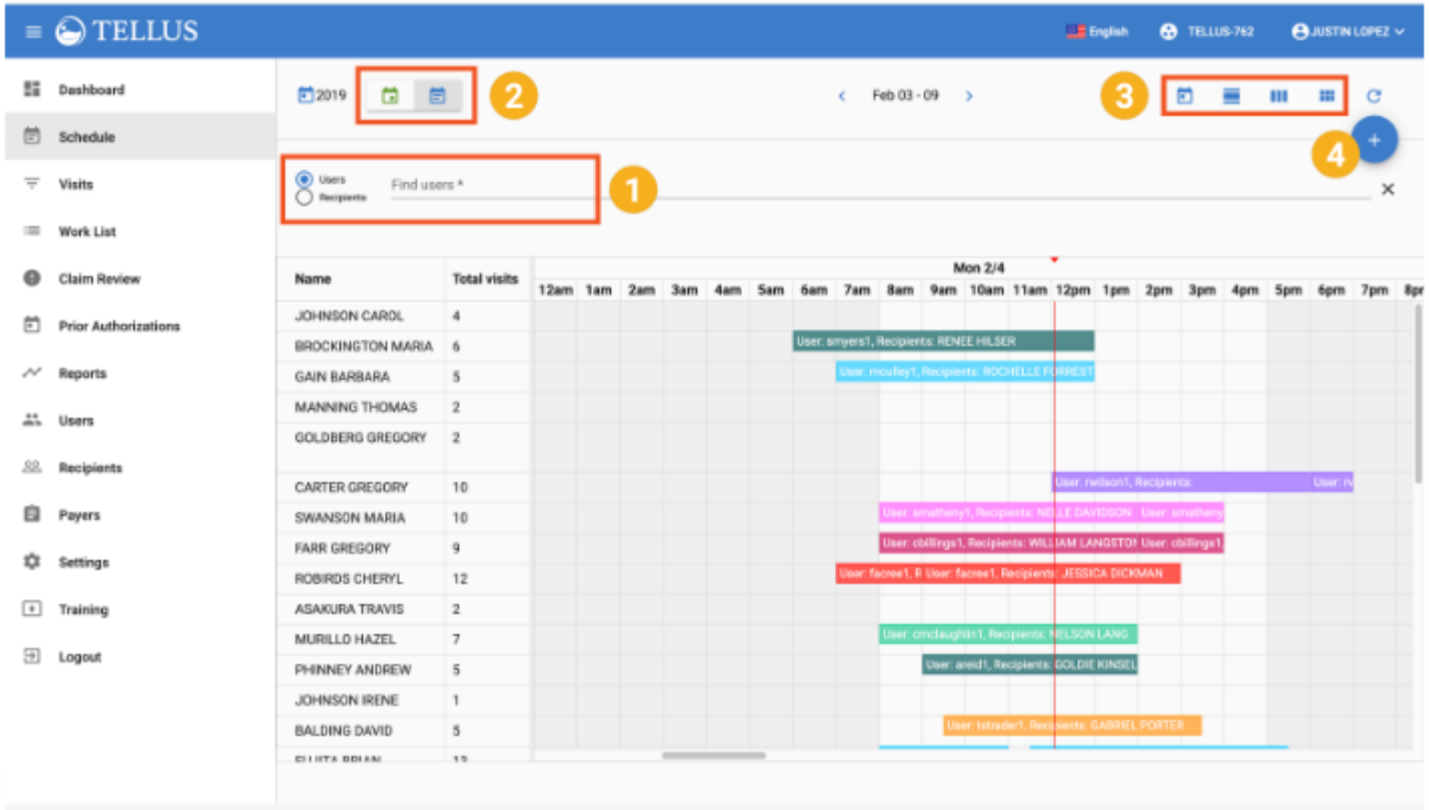
The ***Inbox*** default is set to automatically refresh every 30 seconds. You can change how frequently the ***Inbox*** refreshes by going to the **Settings** page and updating the setting for Message Auto-Refresh Timer. You can manually update your ***Inbox*** at any time by simply clicking the refresh icon.

In the ***Inbox*** panel you can:

1. View unread messages, the default view, or click the closed envelope icon.
2. Access messages you've already read by clicking the open envelope icon.
3. Search messages by clicking the magnifying glass icon.

You can change the number of messages per page by clicking the *Items per page* drop-down box. You can page through messages by clicking the forward arrow or the back arrow.

Administrator Console View - Viewing Provider Schedule



The **Schedule** page of the Tellus eVV Administrator Console is accessed by clicking **Schedule** in the **Main Menu**. The **Schedule** panel graphically displays all scheduled visits for Providers and Recipients during the time period displayed.

To view the **Schedule** by Providers, select the radio button that says *Users*. To view the **Schedule** by Recipients, select the radio button that says *Recipients*.

1. You can also search the **Schedule** by typing the name you want to find in the box that says *Find users*.
2. You can change the **Schedule** to calendar view or scheduler view by selecting the corresponding icon.
3. You can change the time period presented by clicking the corresponding icon for *Day*, *Week,* or *Month*.
4. You can schedule a **new visit** by selecting the blue plus icon.

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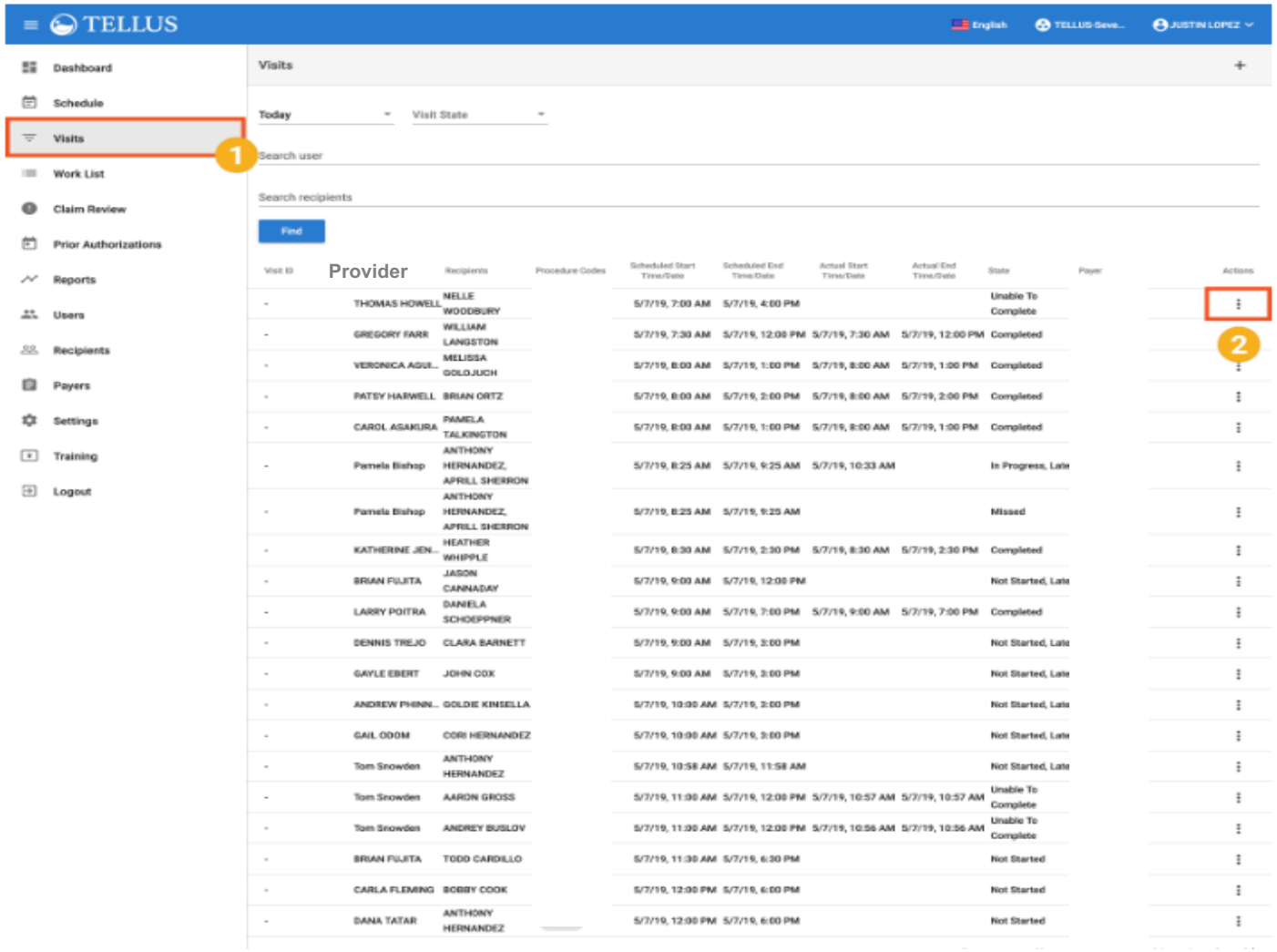
Viewing Visit Details



You can access the ***Visit Details*** page by clicking any status tile on the **Home** page. Or, you can click the **Main Menu** icon to expand the full menu and click **Visits** (1). You can click the submenu icon on the right (2) to view some high-level details about the visit.

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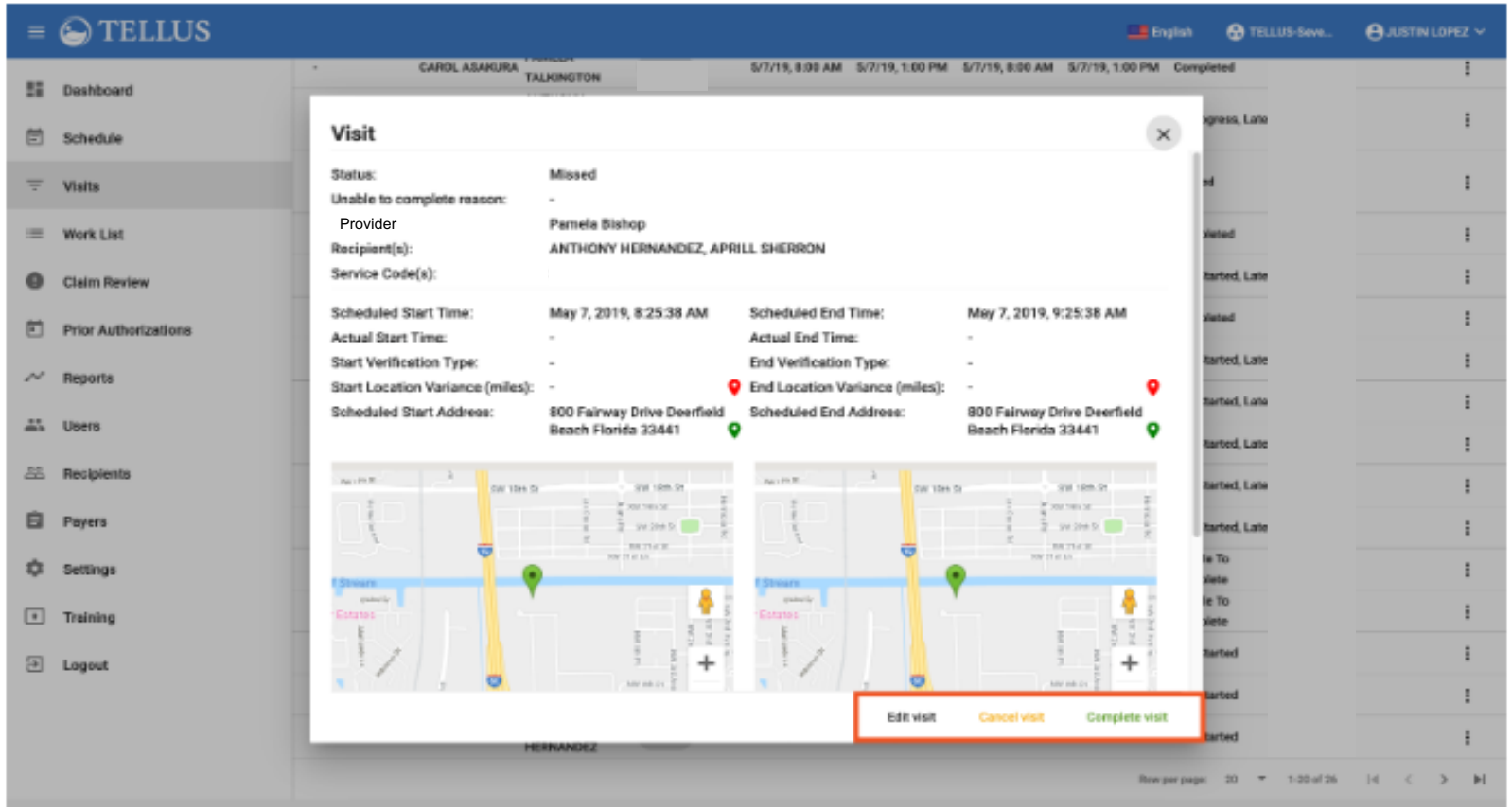
Viewing Visit Details

If the visit has any status other than Completed, Completed, Late, or Unable to Complete, you will see the options to *Edit Visit, Cancel/Delete Visit* or *End Visit* at the bottom of the pop-up box. The full details of the visit are available in the **Work List**.



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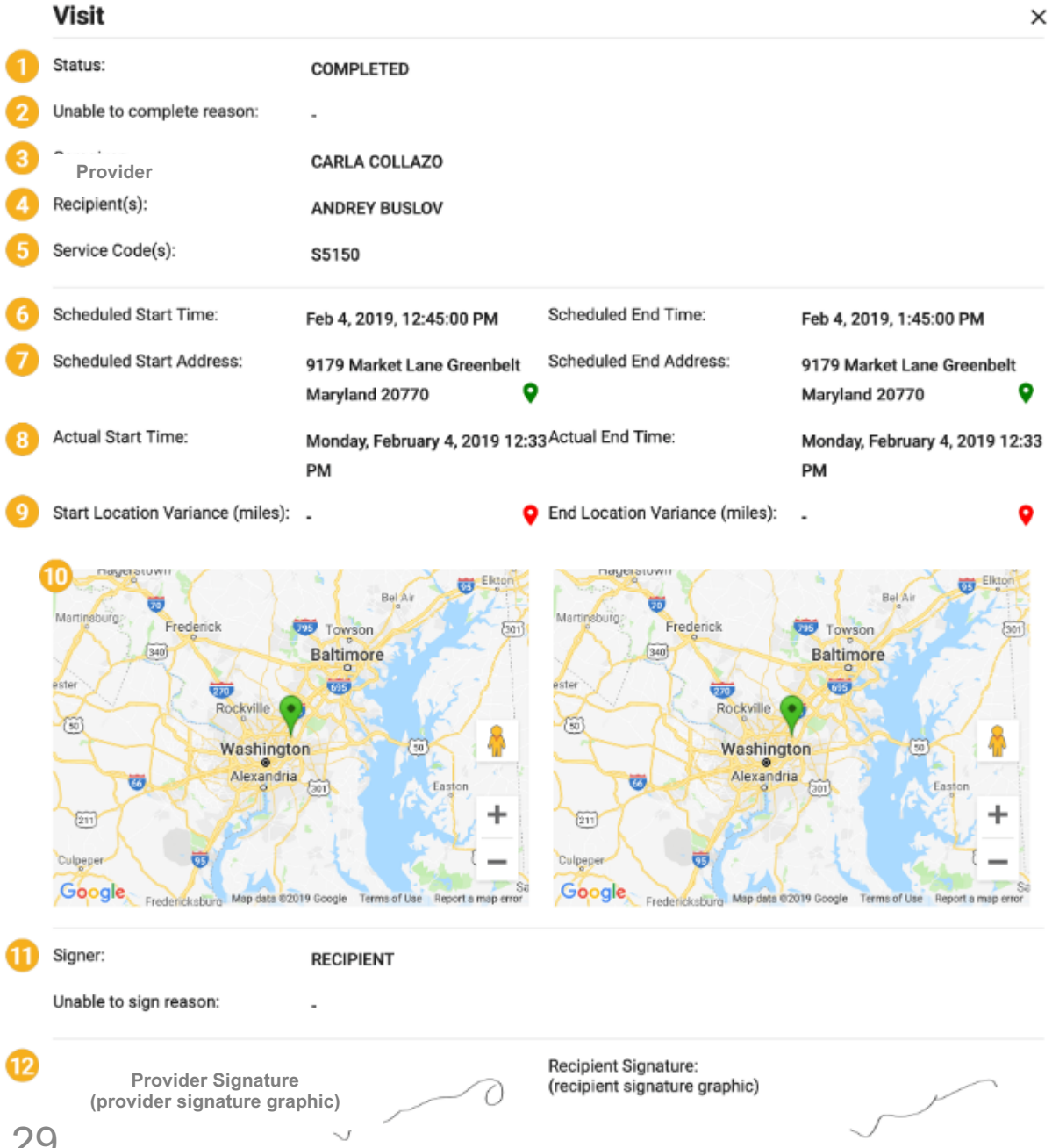
Viewing Visit Details



Visit Detail

Depending on the status of the scheduled visit, (*Completed, In Progress, Late,* etc.), you will be able to see some of the following details of the Recipient's scheduled visit.

1. Status
2. Unable to complete reason
3. Provider
4. Recipient(s)
5. Service Code(s)
6. Scheduled Start and End Time
7. Scheduled Start and End Address
8. Actual Start and End Time
9. Start Location Variance and End Location Variance
10. A Google map that displays where the service was performed
11. Signer
12. Provider Signature and Recipient/**Responsible Adult** Signature

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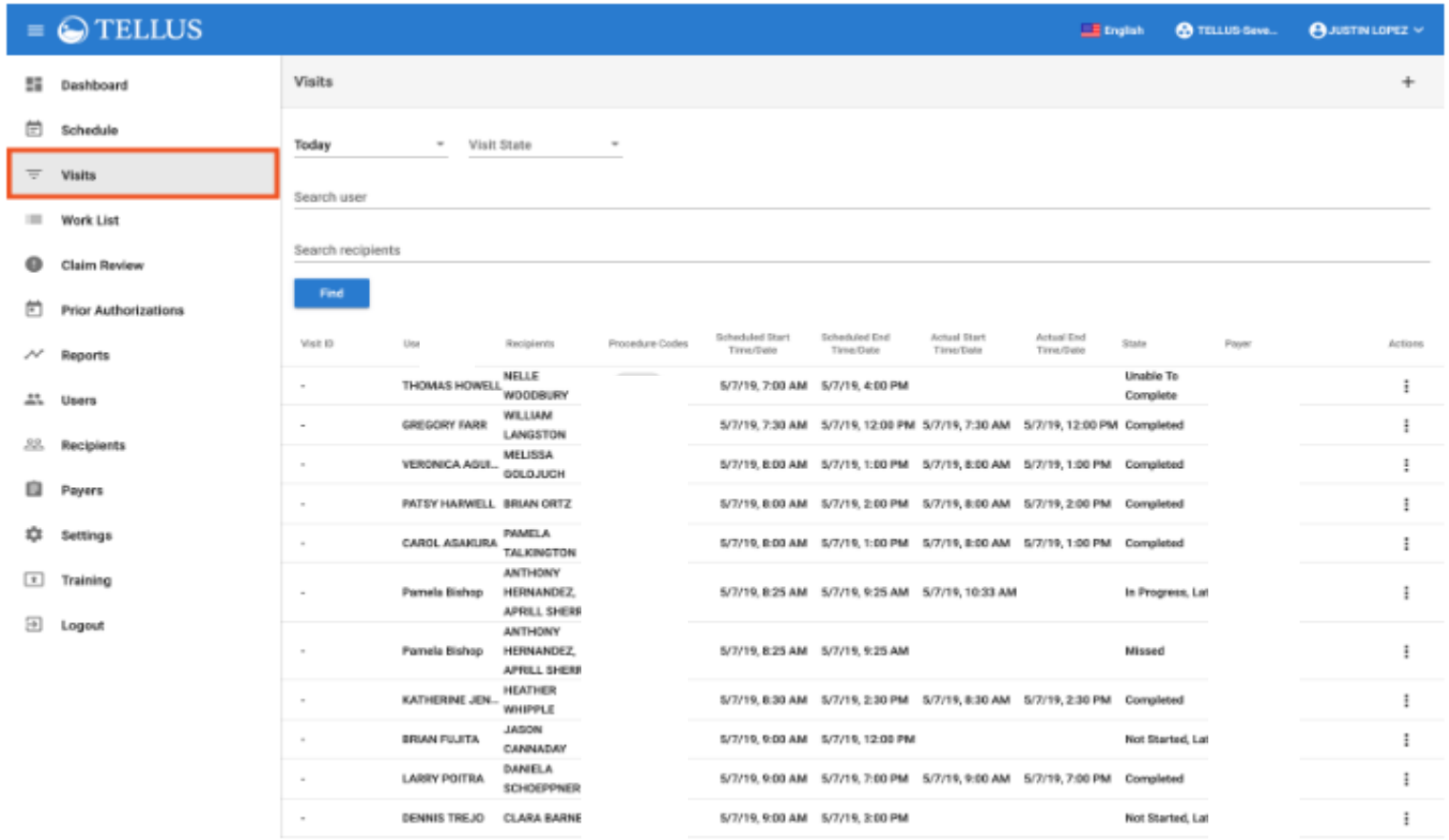
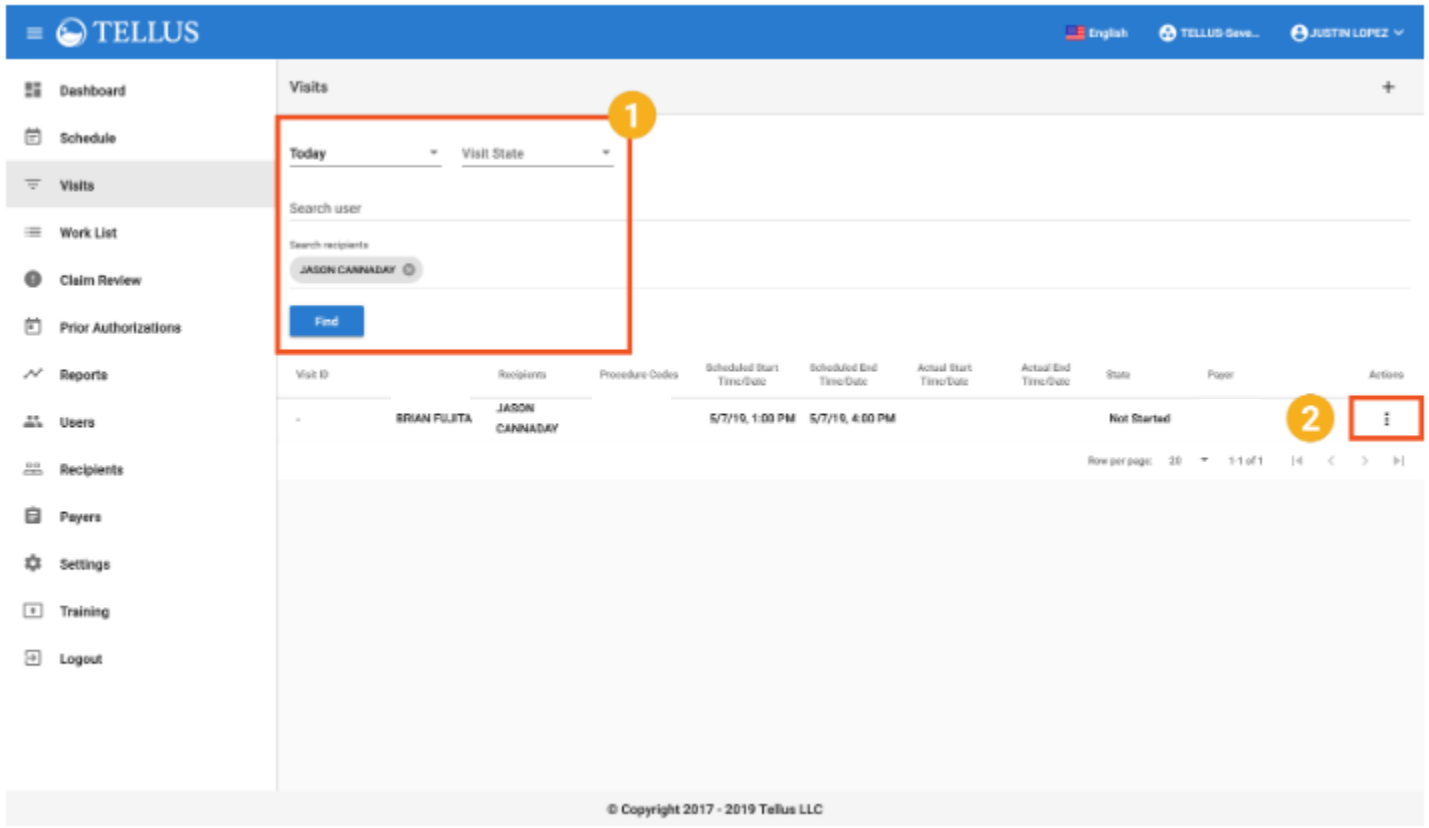
Completing a Visit



If a Provider is unable to complete a visit for any reason, you can complete the visit manually in the Tellus eVV Administrator Console. You will need to provide a reason for completing the visit manually. To access the ***Complete visit*** option, expand the **Main Menu**, and click **Visits**.

Completing a Visit



Search for the visit using either the time period, visit status, user name or recipient name (1). Once you see the visit in the search results (2) click the submenu icon on the right.

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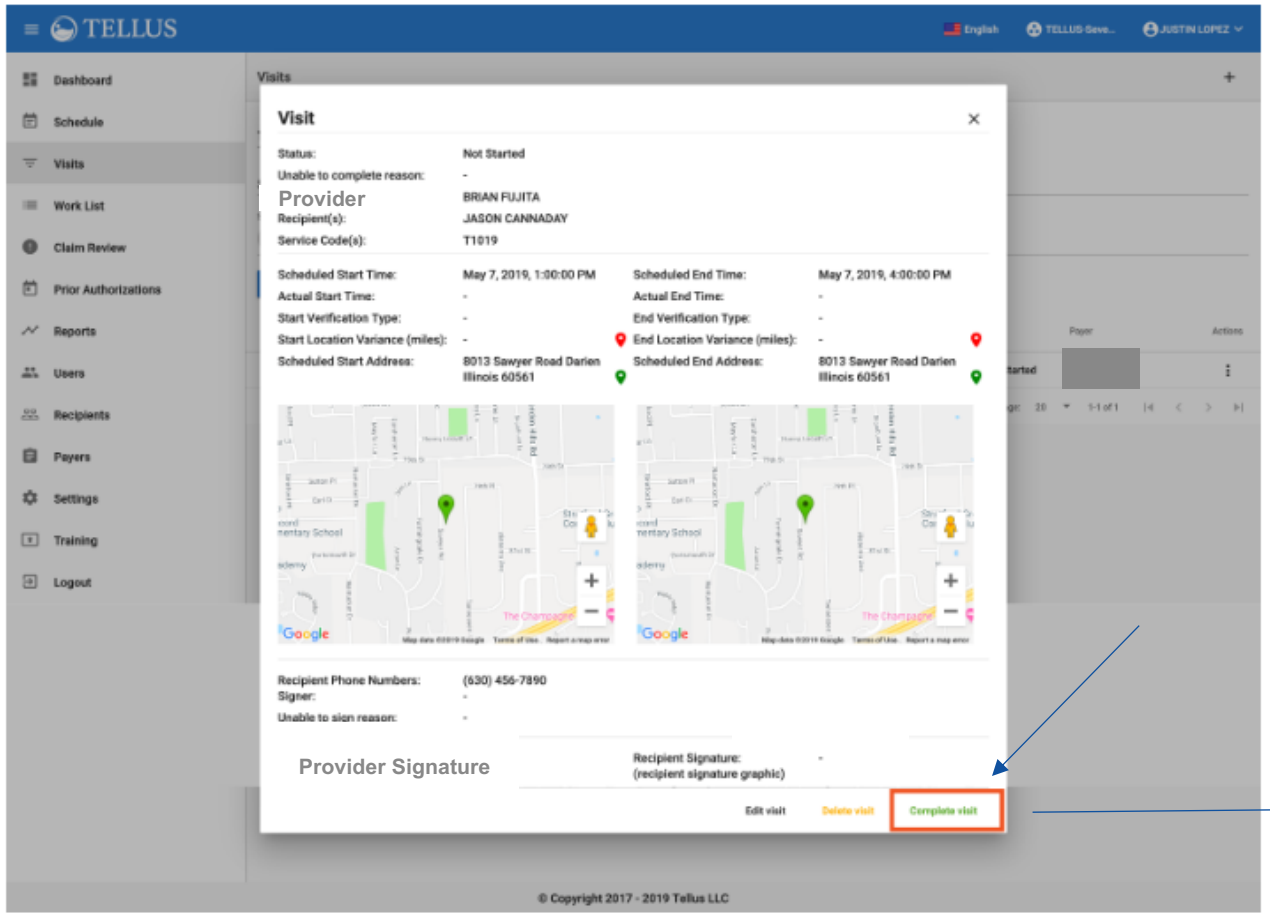
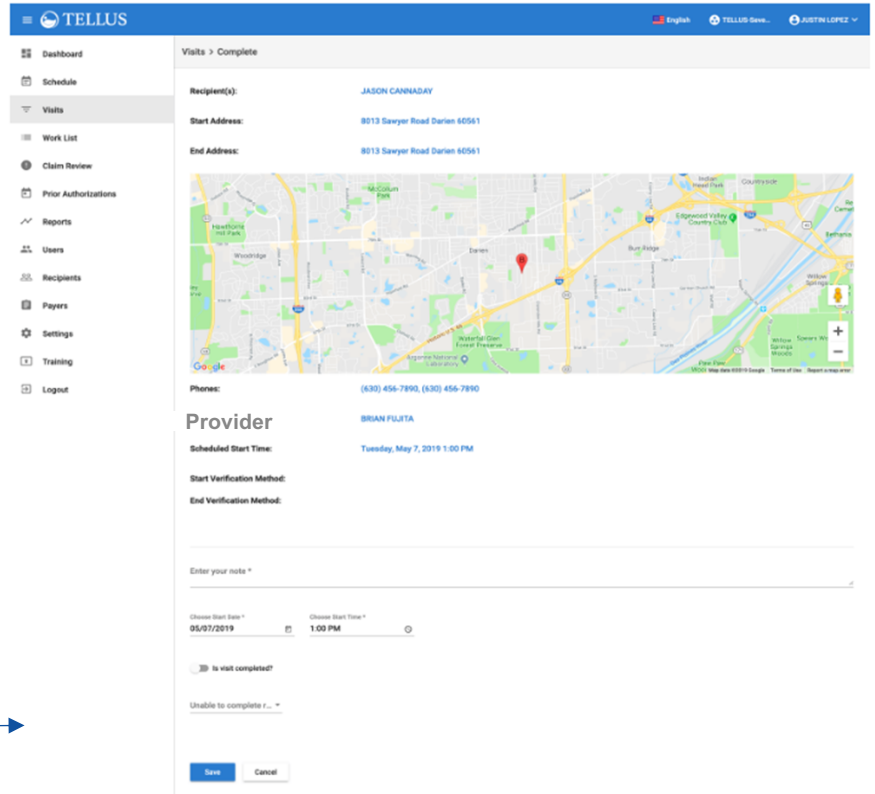
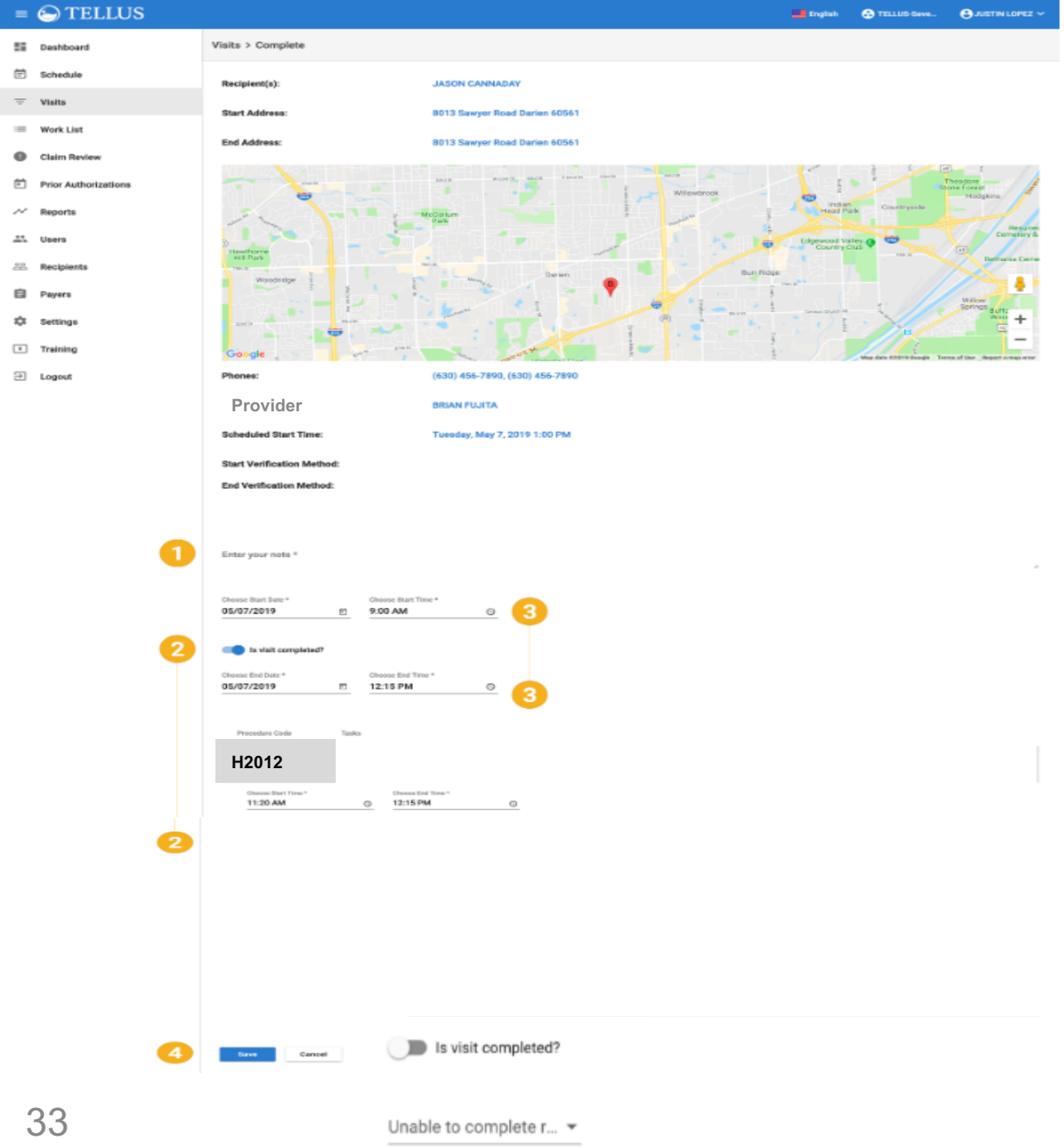
Completing a Visit



After clicking ***Complete visit***, you will see the ***Complete visit*** page.



You will see a pop-up page that displays some high-level details about the visit. If the visit has not been completed or canceled, at the bottom of this pop-up page, click ***Complete visit*** to view the ***Complete visit*** page.

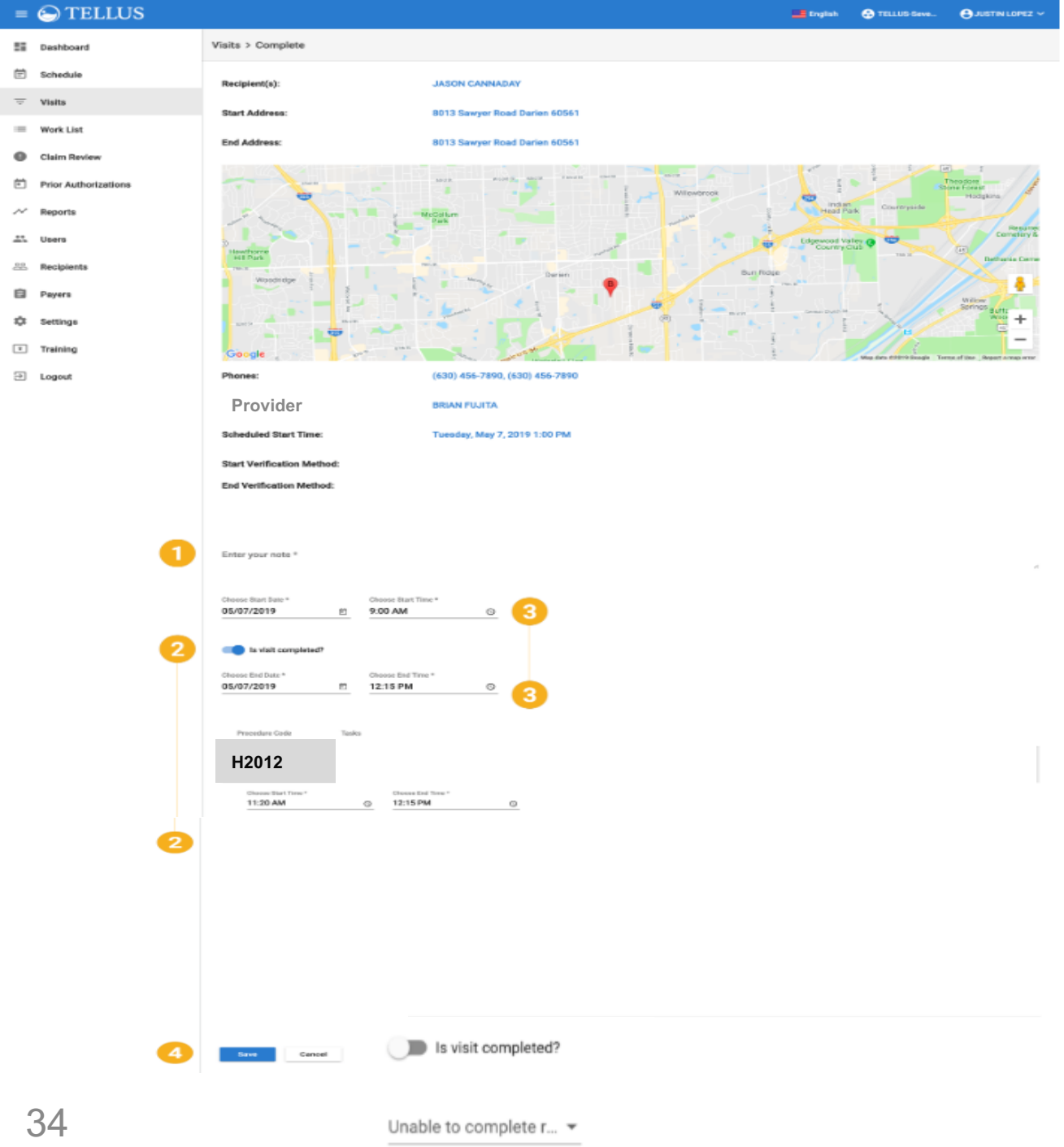


From the ***Complete visit*** page, you can:

1. Enter notes in the required field labeled ***Enter your note***.

2. Complete the visit by sliding the ***Is visit completed?*** toggle to the right. Blue indicates that the visit is completed and allows you to enter more details about the completed visit. You will need to add a reason code to explain why the visit is being completed manually.

3. Edit the ***Start Date***, ***Start Time***, ***End Date*** and ***End Time*** for the visit and for the individual services. The dates and times may be entered manually or by using the Calendar Icon and Clock Icon. See Setting Dates Using the Calendar Icon and Setting Time Using the Clock Icon for additional information.

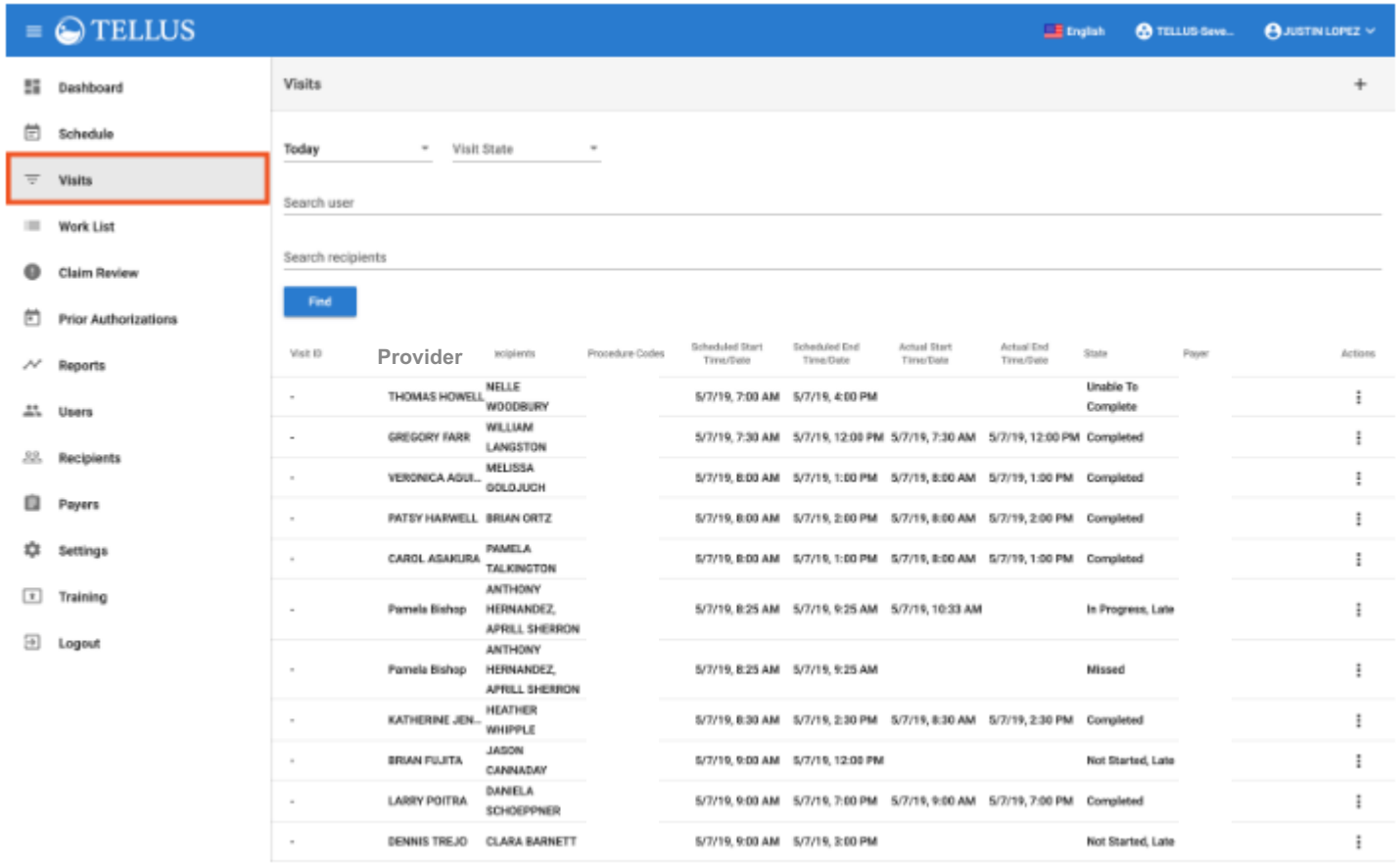


From the ***Complete visit*** page, you can:

4. Click ***Save*** to save and complete the scheduled visit. The ***Complete visit*** page closes.

You can also indicate that the visit could not be completed. Leave the ***Is visit completed?*** toggle positioned to the left (it will remain white). Click the ***Unable to Complete*** field and select the appropriate reason the visit was not completed.

Canceling a Visit

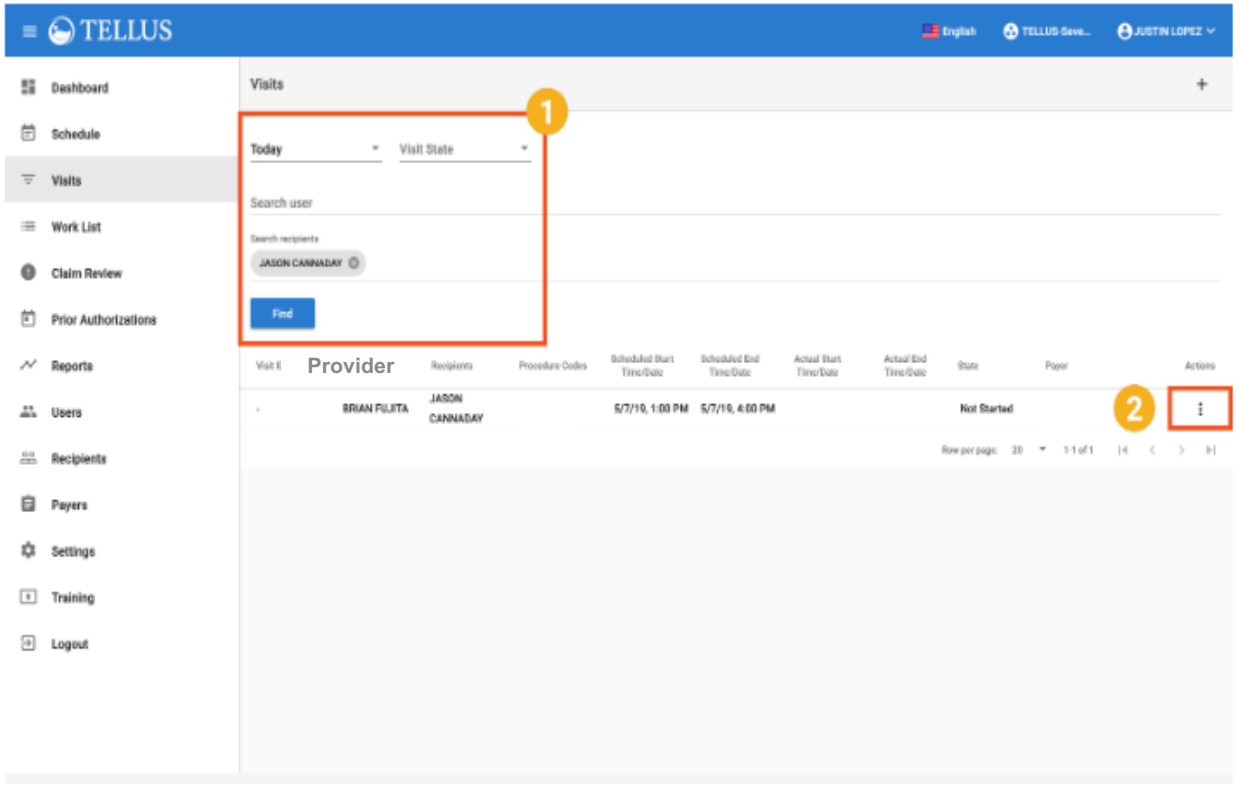


You can cancel a visit from the **Visit** detail pop-up page.

A visit can only be canceled if it is late or missed. Otherwise, you will see ***Delete visit*** instead of ***Cancel visit***.

To access the ***Cancel visit*** option, expand the **Main Menu** and click **Visits**.

Canceling a Visit



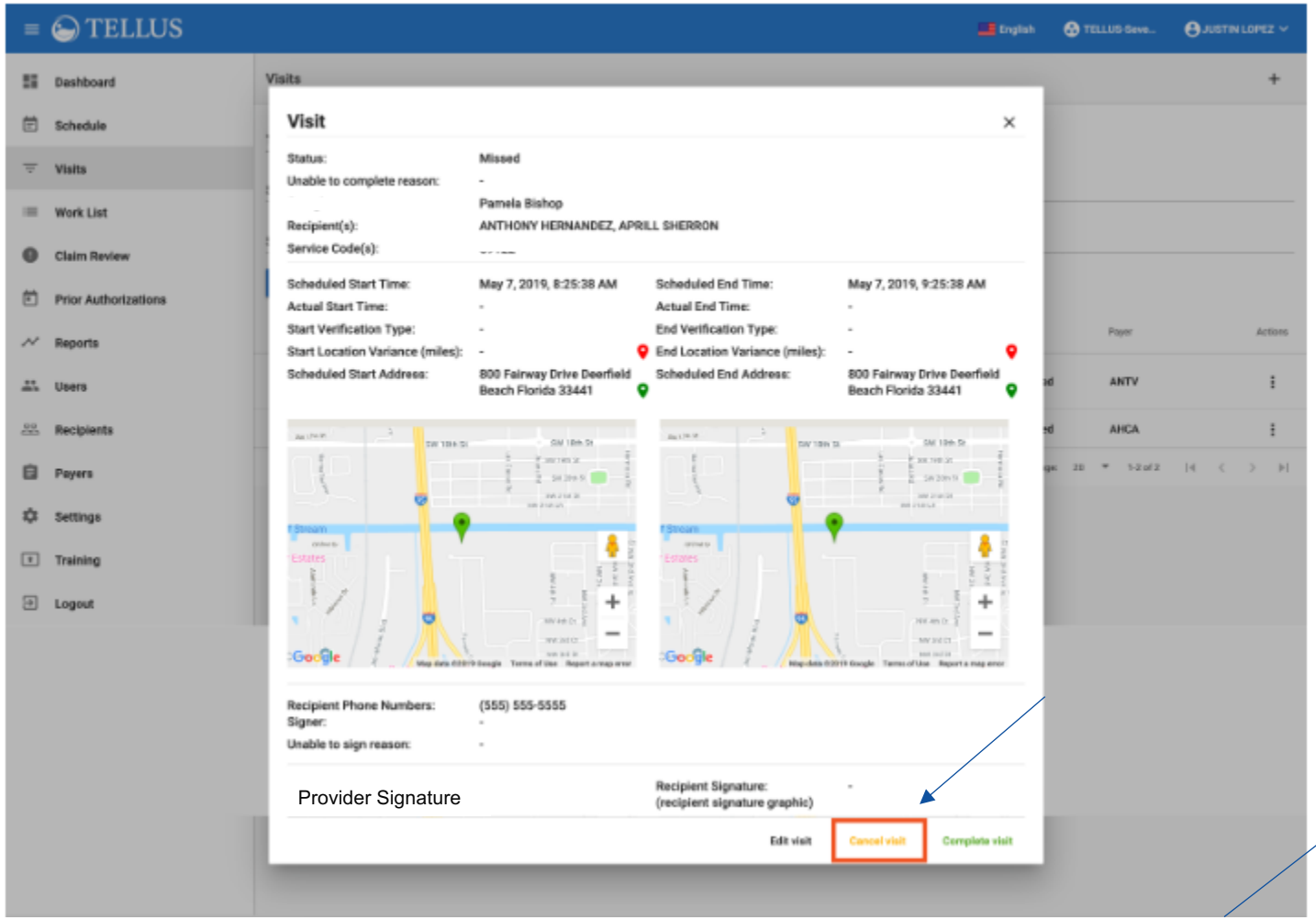
Search by time period, visit status, user or recipient to locate the visit.

1. When you see the visit in the search results, click the submenu icon to view details about the visit.

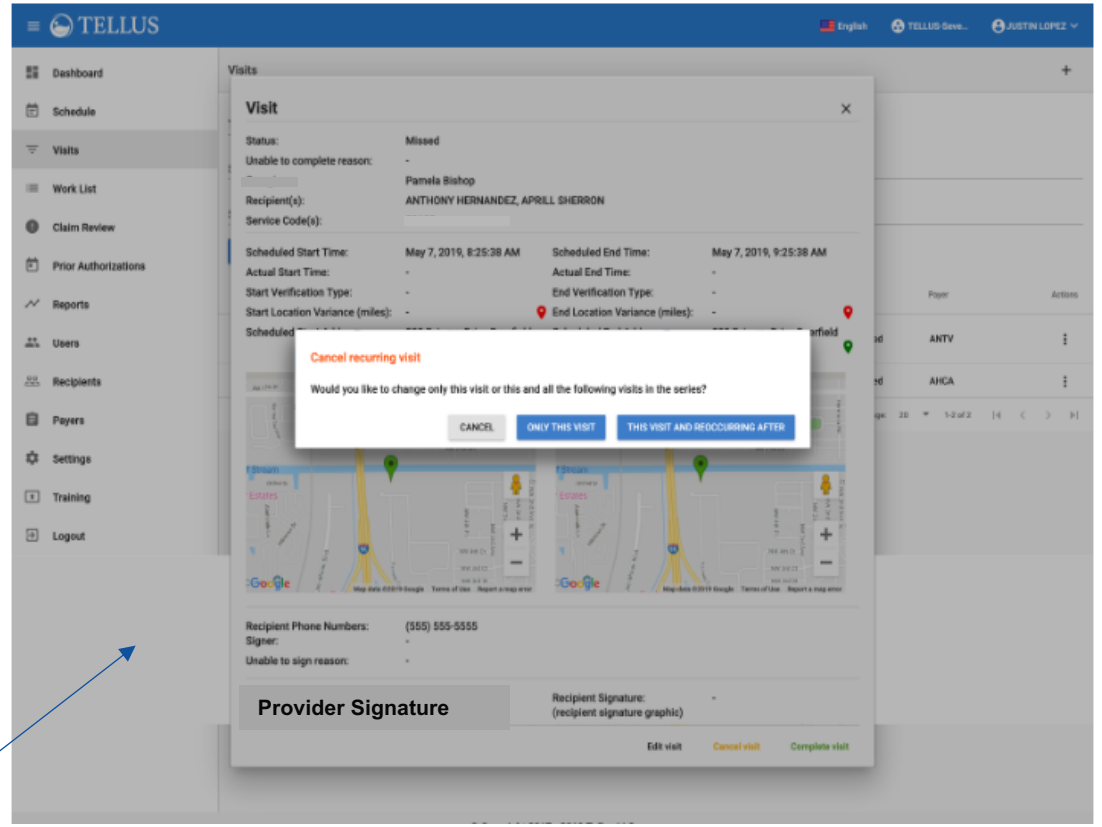
2. You will see a pop-up page that displays high-level details about the visit. If the visit has not been completed or canceled you can click ***Cancel Visit*** to view the ***Cancel Visit*** at the bottom of this pop-up page.

Canceling a Visit

Click ***Cancel Visit*** on the **Visit** pop-up page.



The ***Cancel visit*** confirmation pop-up dialog will appear.



Click ***Close*** to exit the confirmation pop-up dialog without canceling the visit. You will return to the ***Visit*** pop-up.
Click ***Cancel Visit*** to cancel the visit. The **Cancel Visit** dialog and the **Visit** dialog both close.
The canceled visit is not removed from the **Schedule** list. The **Status** of the scheduled visit will change to ***Unable to Complete***.
The ***Unable to Complete Reason*** is ***Canceled***.

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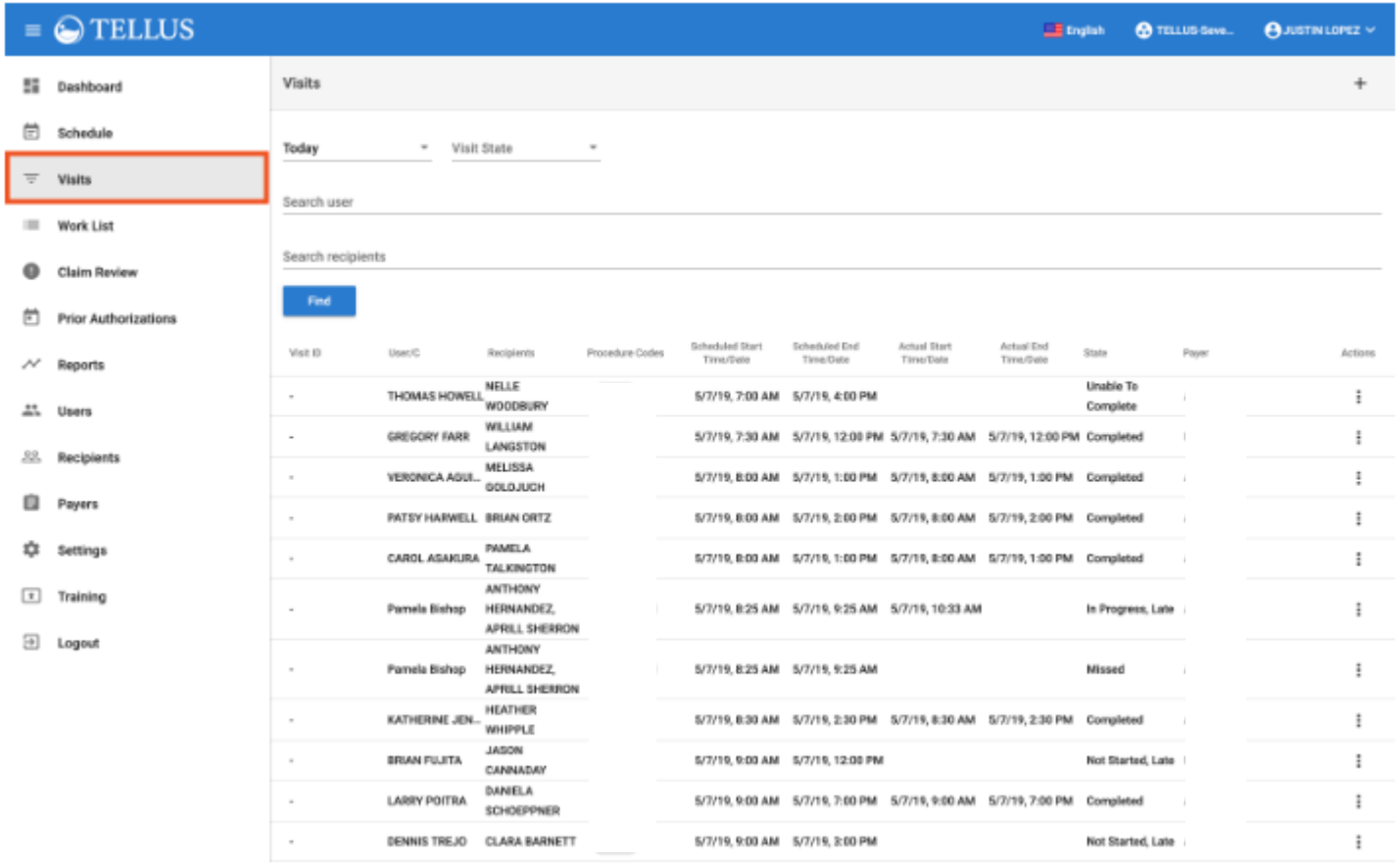
Deleting a Visit

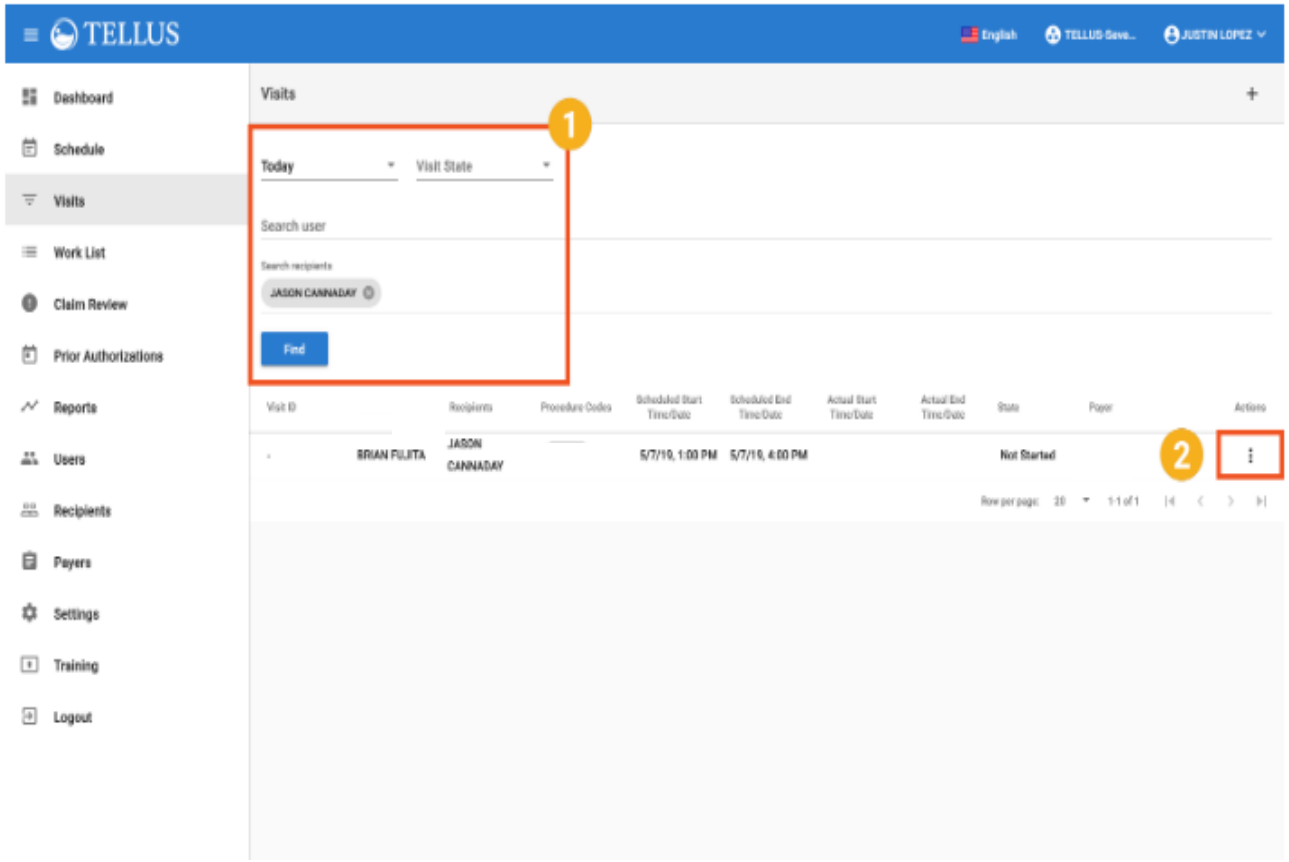


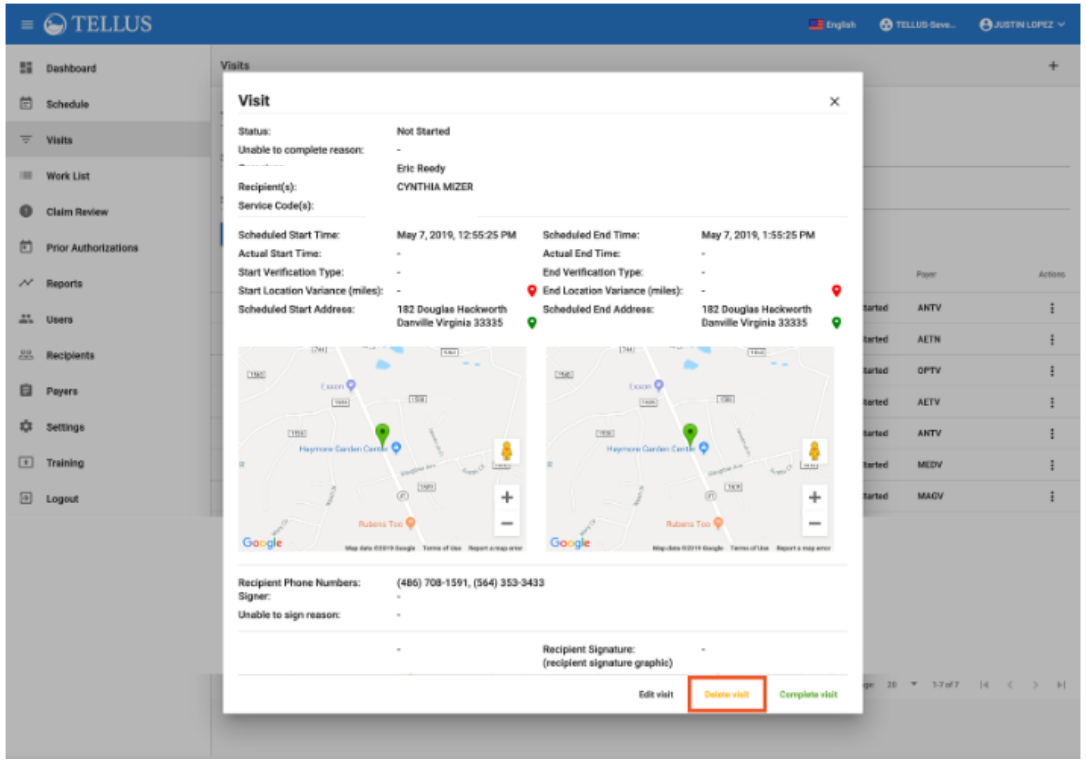
You can delete a visit from the **Visit** pop-up page. A visit can only be deleted if it is happening in the future.

If the visit was scheduled to start in the past (a late visit) you will see ***Cancel visit*** instead of ***Delete visit***.

To access the ***Delete visit*** option, expand the **Main Menu** and click **Visits**.

Deleting a Visit





Search by time period, visit status, user or recipient to locate the visit (1). When you see the visit in the search results (2) click the submenu icon to view details about the visit. You will see a pop-up page that displays high-level details about the visit. If the visit is in the future, you can click ***Delete visit*** at the bottom of this pop-up page.

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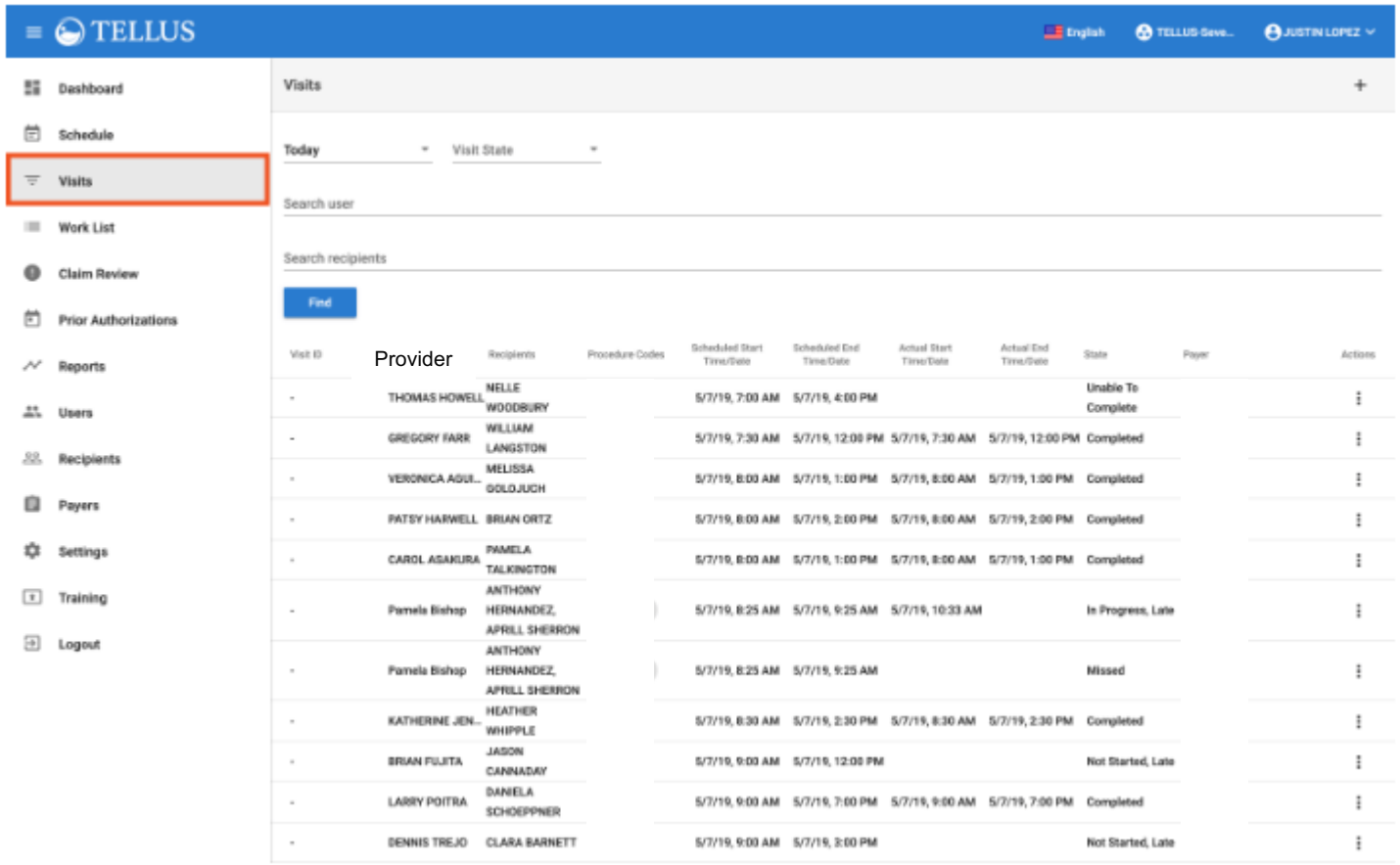
Editing a Visit



You can edit a visit from the **Visit detail** page.

A visit can only be edited if it has not been completed or canceled.

To access the ***Edit visit*** option, expand the **Main Menu** and click **Visits**.

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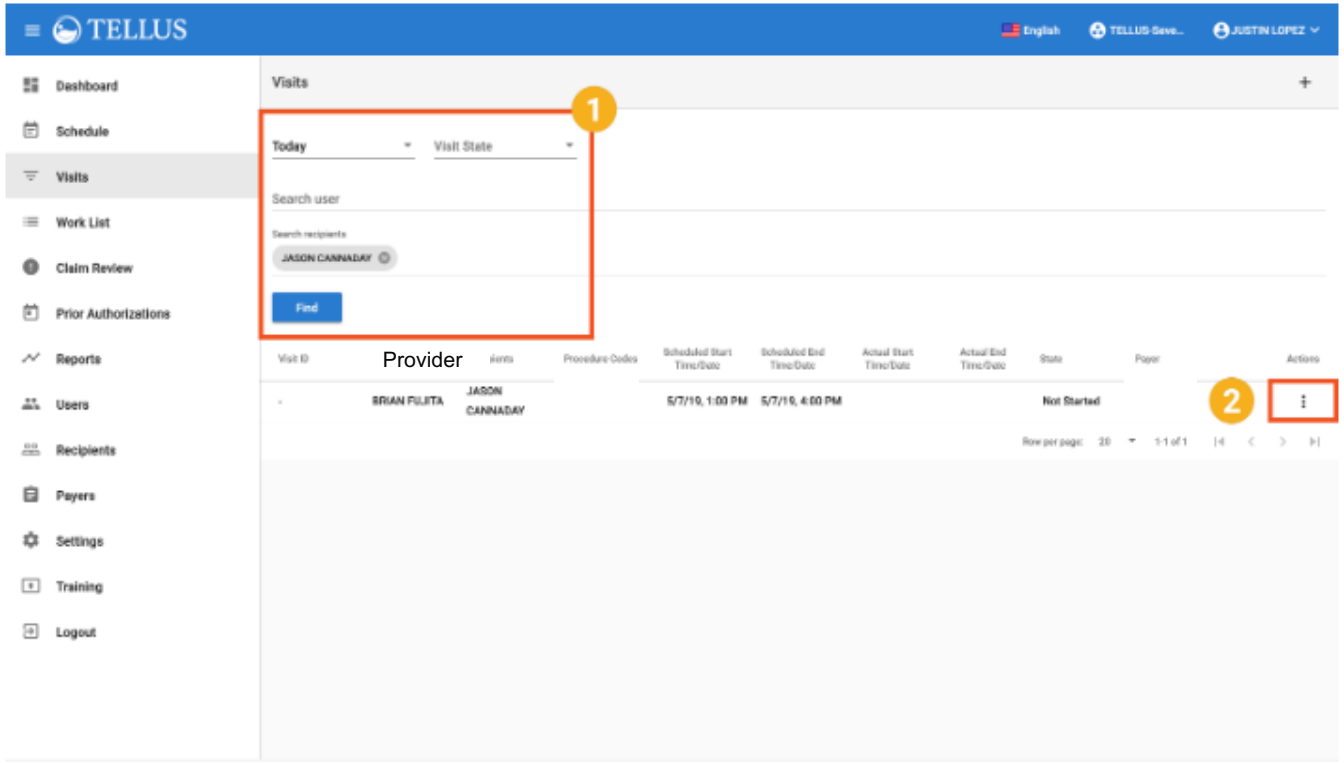
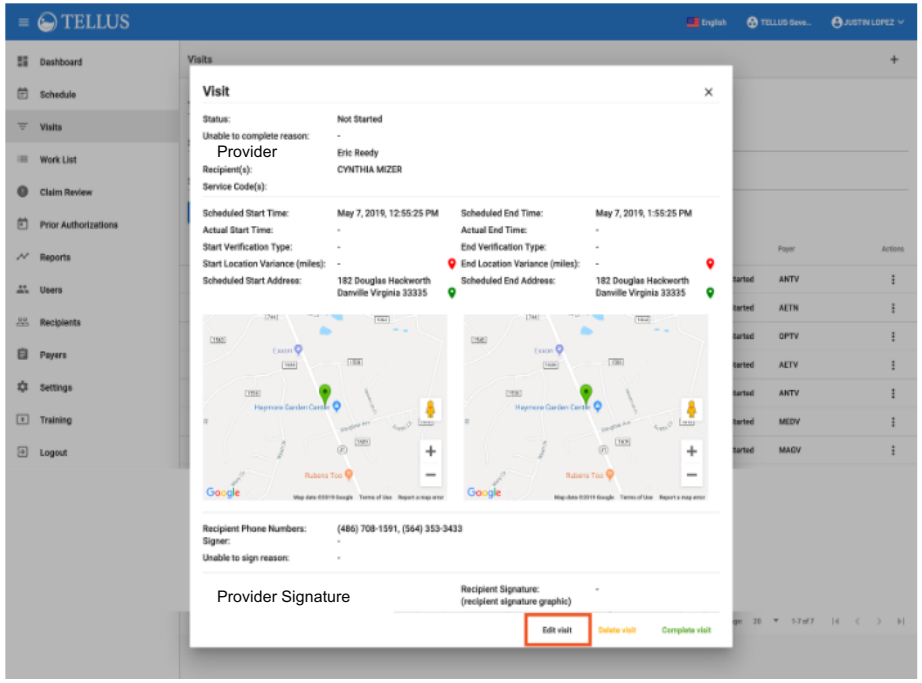
Editing a Visit



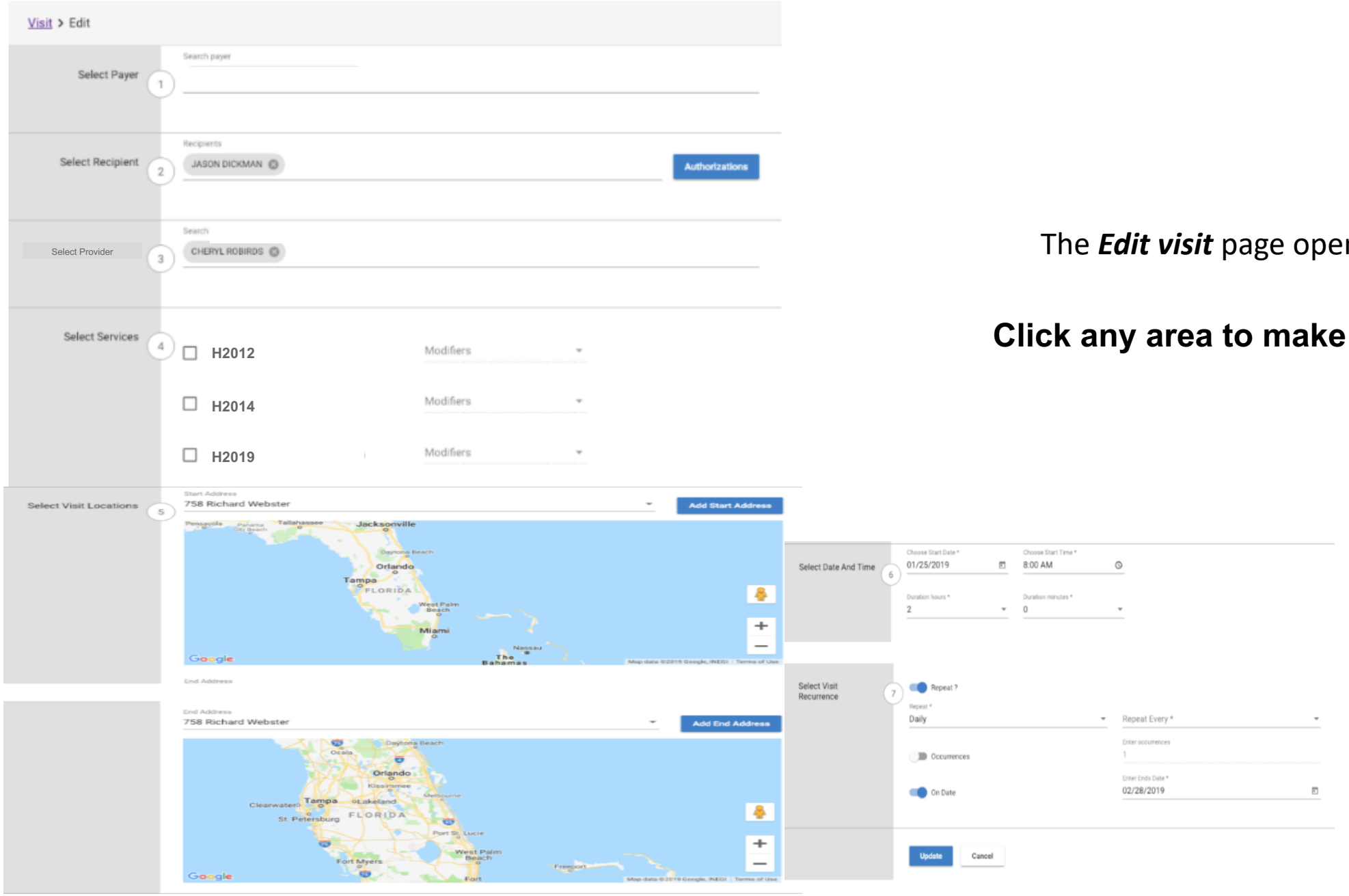


Search by time period, visit status, user or recipient to locate the visit.

(1) When you see the visit in the search results, click the submenu icon to view details about the visit.

(2) You will see a pop-up page that displays high-level details about the visit. If the visit has not been completed or canceled you can click ***Edit visit*** to view the ***Edit visit*** page at the bottom of this pop-up page

Editing a Visit



The ***Edit visit*** page opens

Click any area to make edits

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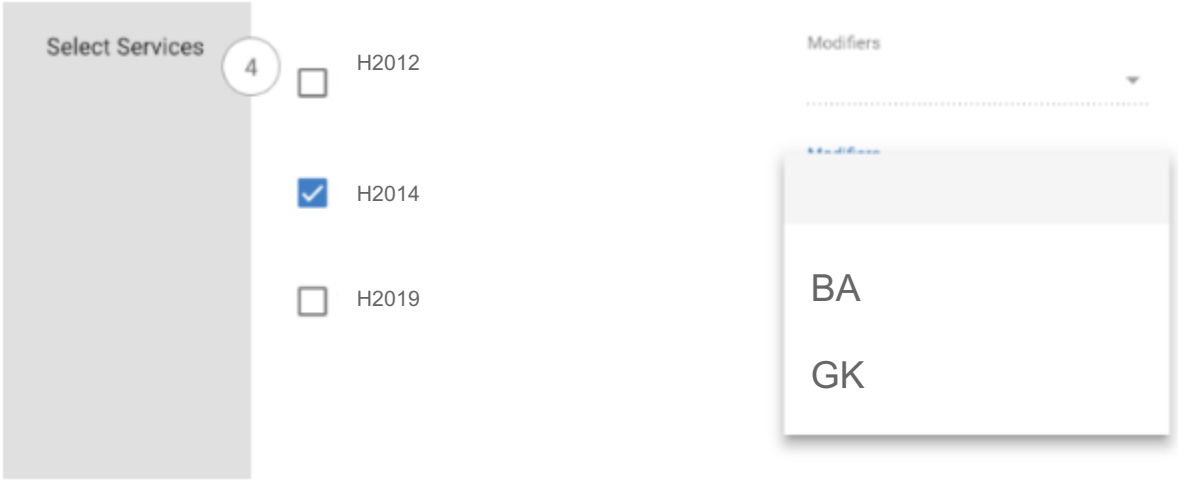
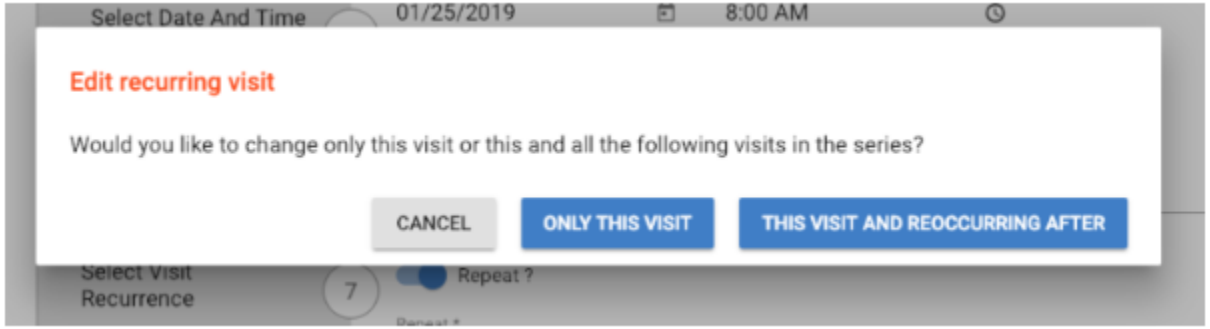
Editing a Visit



For example, in the ***Select Services*** section, uncheck the services that are not being scheduled and check the services that are being scheduled.



When you have edited or confirmed all necessary sections, click ***Updated*** to finalize the edits to the visit.
If the visit does not recur, the changes will be committed and the ***Edit visit*** screen will close.
If the visit is recurring, you will see a pop up with three options.

You can confirm whether you want the changes you've just made to apply to just this visit (***Only this visit***), or to this visit and every visit that follows after this one (***This visit and recurring after***). Click the appropriate option. The changes will be committed and the ***Edit visit*** screen will close. See Scheduling Repeating Visits for additional information

Click **Cancel** to exit the confirmation pop-up dialog. The scheduled visit will not be edited, and you will remain in the **Edit visit** dialog.

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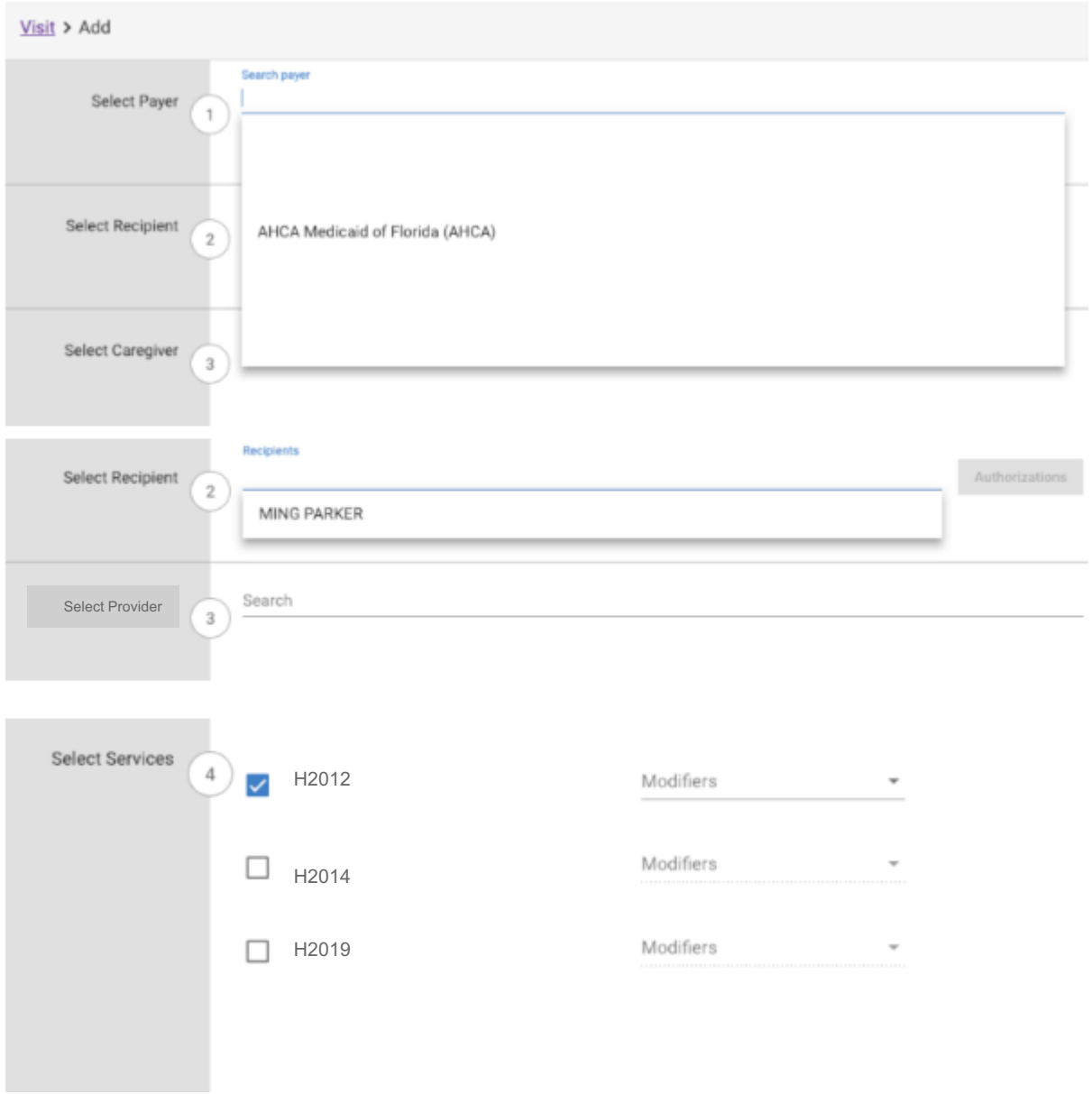
Adding/Scheduling a Visit



From the **Main Menu** click the **Schedule** option to see the **Schedule** page (See Viewing the Menu for more information).
Click the “add visit” icon in the upper right to see the ***Add visit*** page.

You will see the ***Add visit*** page open. Follow the numbered steps to *Select Payer, Select Recipient, Select Provider, Select Services, Select Visit Locations, Select Date and Time* and *Select Visit Recurrence* if it’s a recurring visit.

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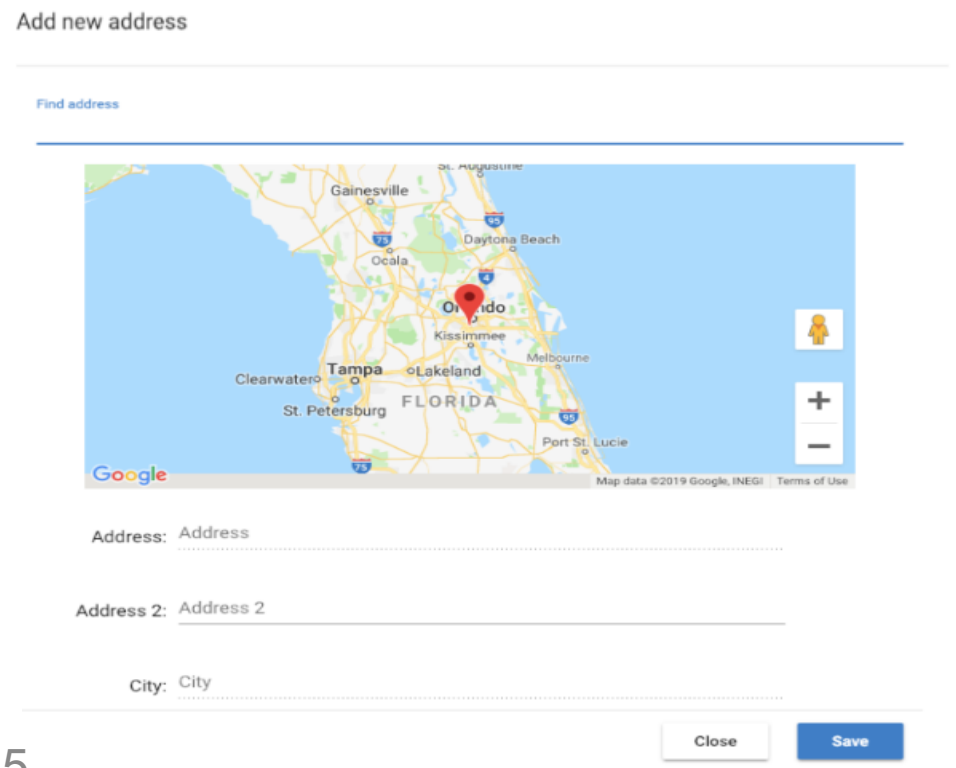
Adding/Scheduling a Visit



The primary address for the recipient will populate automatically. You can click the drop-down menu to select another address on file or choose to add a new address by clicking the ***Add Address*** button.

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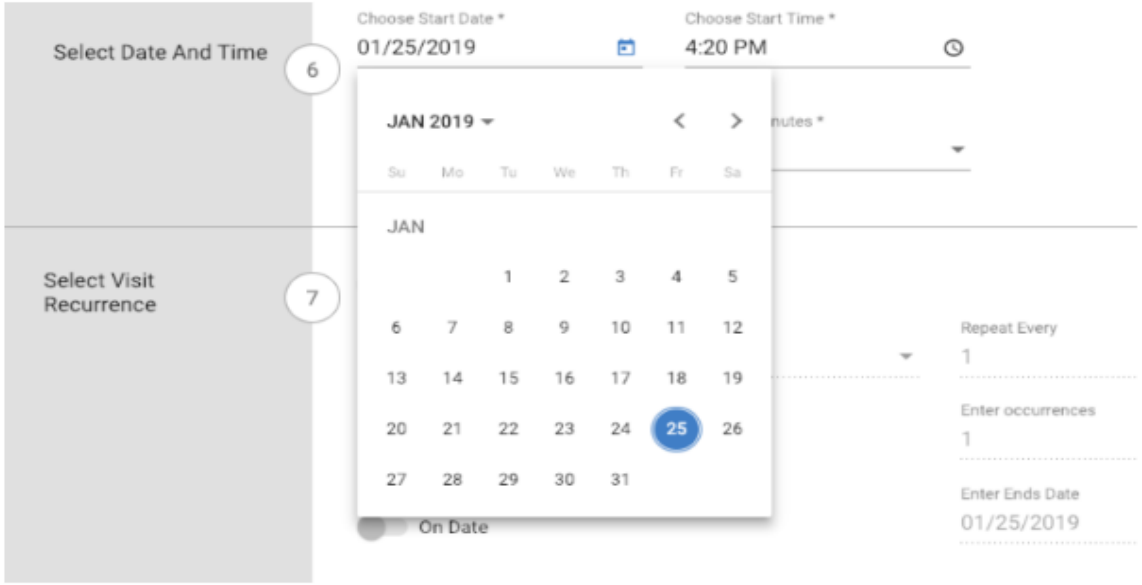
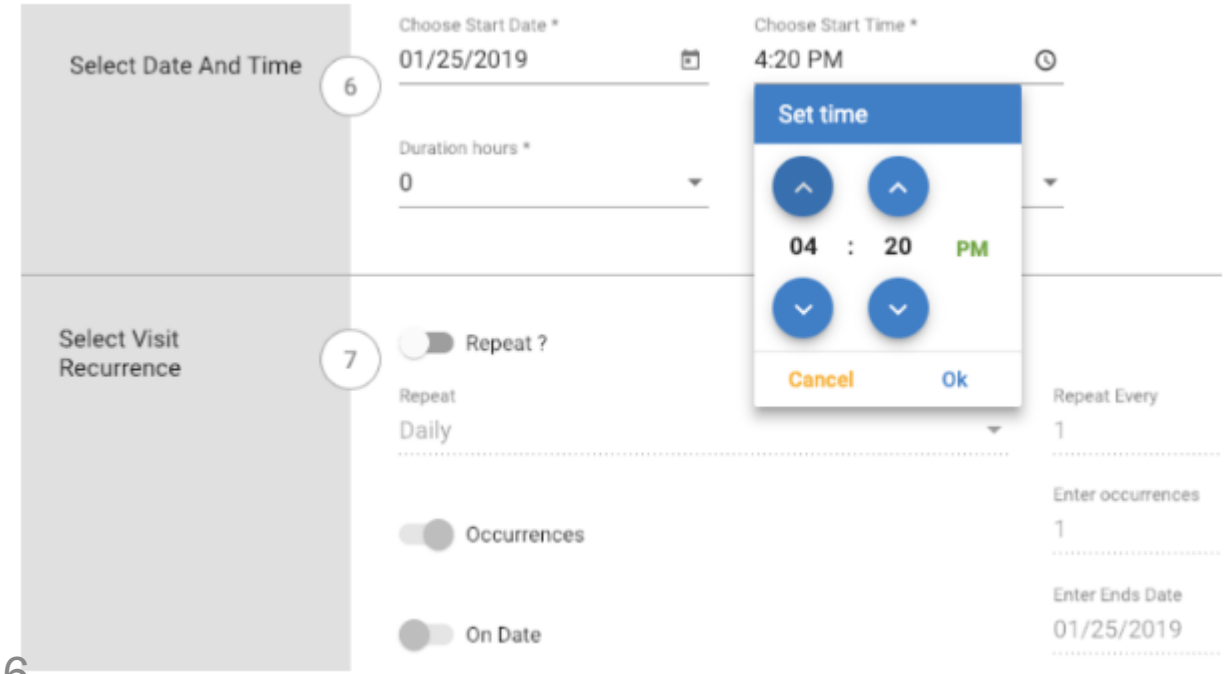
Adding/Scheduling a Visit





Select the *start date, start time* and the total *duration* in hours and minutes.

If this visit only occurs once, click **Save** and the visit will be created.

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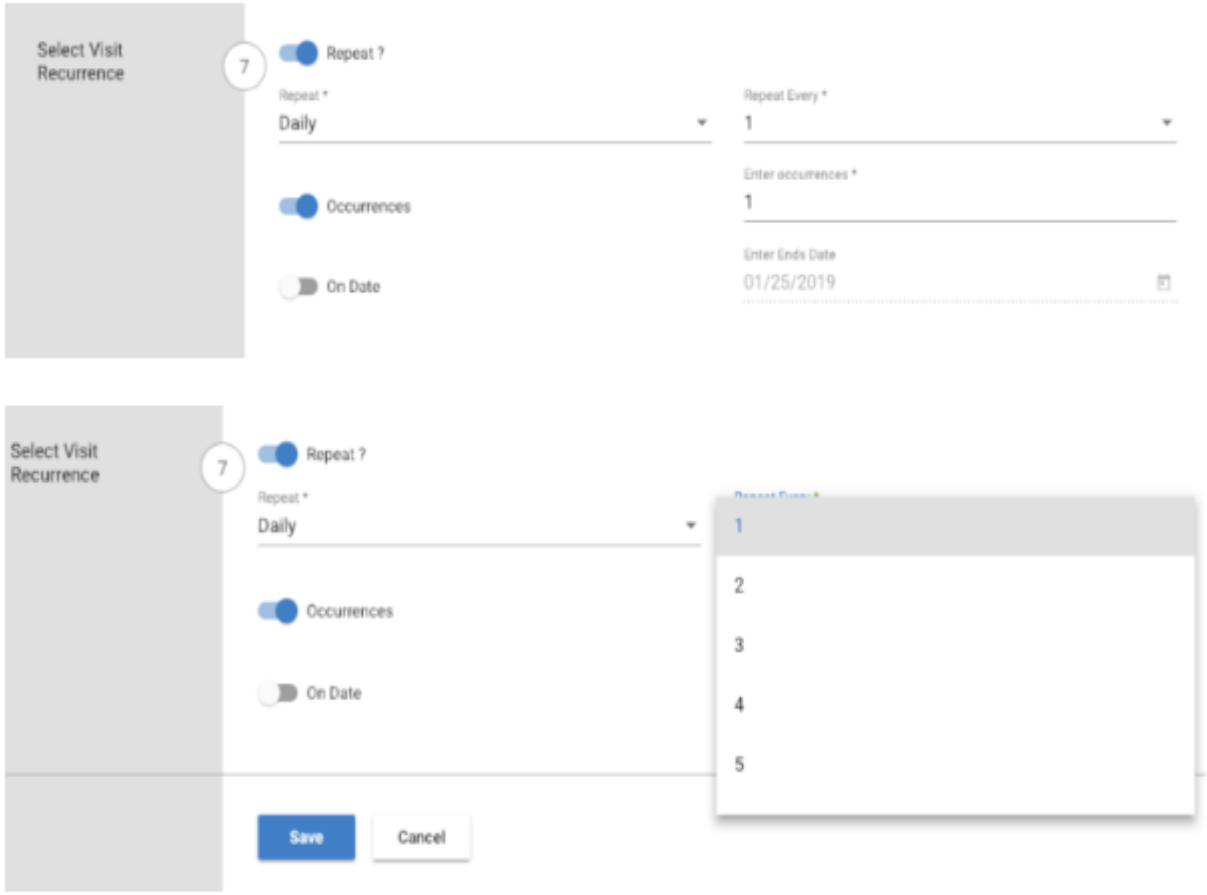
Adding/Scheduling a Visit



If this visit will repeat, slide the ***Repeat?*** toggle to the right. The toggle will turn blue. Set the appropriate repeating schedule using the dialog boxes.

Once the schedule is set, click ***Save*** and the visit will be created.

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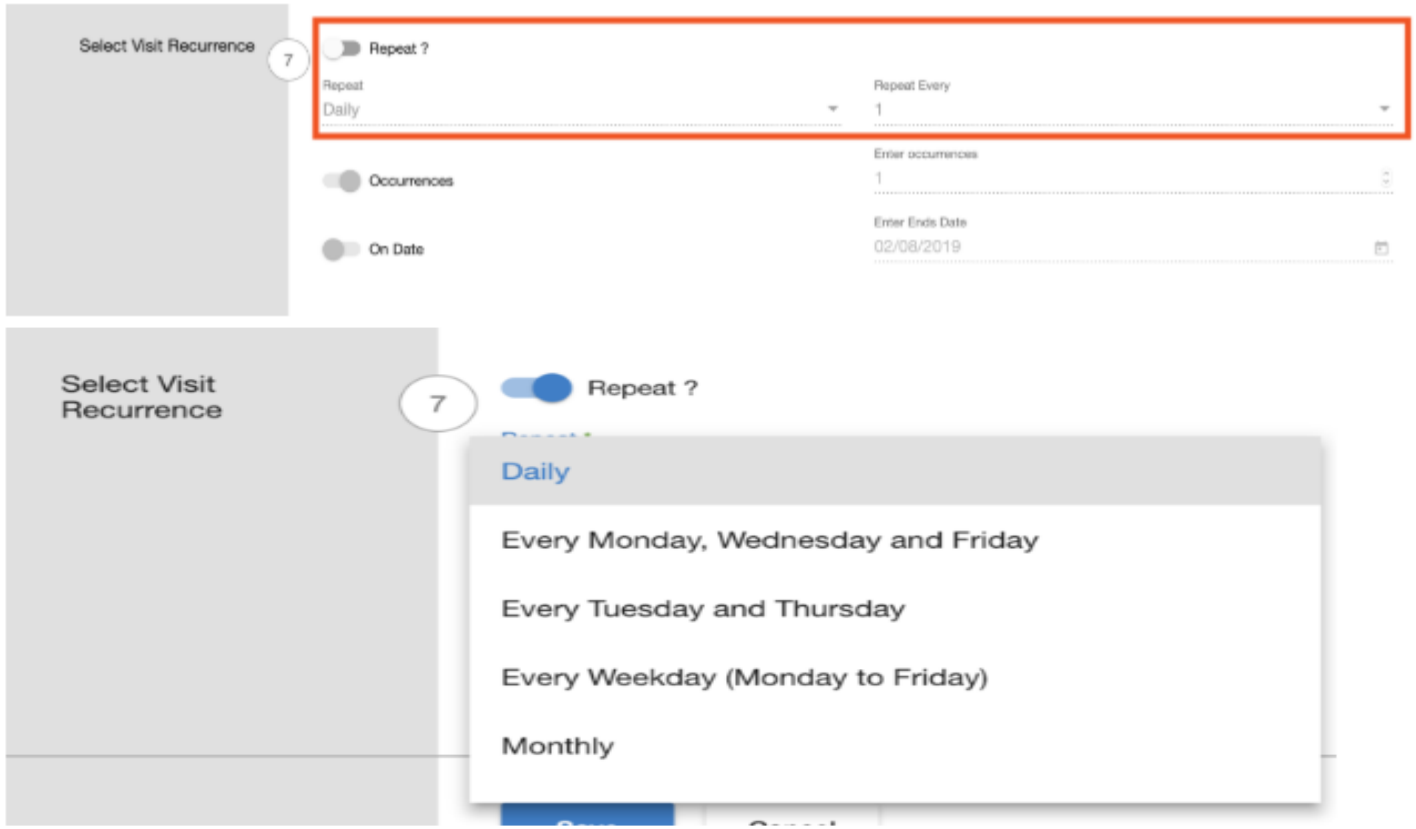
Scheduling Repeating Visits



Repeating visits are visits that are expected to occur on a regular and predictable schedule. To set a repeating visit schedule, slide the ***Repeat?*** toggle to the right. The toggle will turn blue.

Next, you will determine how frequently the visit will repeat. Click the *Repeats* field to view a drop-down list of options.

You can choose from the following:

- Daily
- Every Monday, Wednesday and Friday
- Every Tuesday and Thursday
- Every Weekday (Monday to Friday)
- Monthly
- Weekly
- Yearly

If you selected *Daily*, *Monthly* or *Yearly*, you will need set the ***Repeat Every*** value. A value of “1” will repeat every Week/Month/Year depending on your previous setting. A value of “2” will repeat every 2nd Week/Month/Year, skipping one in between. A value of “3” will repeat every 3rd Week/Month/Year, skipping two in between, and so on.

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Scheduling Repeating Visits

If you select Weekly, you will be able to choose which day(s) of the week you want the visit to occur. You can select multiple days of the week.

You can set the repeating visit to end after a number of occurrences or on a specific date. To end after a number of occurrences, slide the ***Occurrences*** toggle to the right. The toggle will turn blue. Then, select the total number of occurrences.

If you would rather specify an end date, slide the ***On Date*** toggle to the right. The toggle will turn blue, and the other option will return to white. Enter the date the recurrence should end in the ***Choose End Date*** field and click ***Save.*** The visit is added to the schedule.

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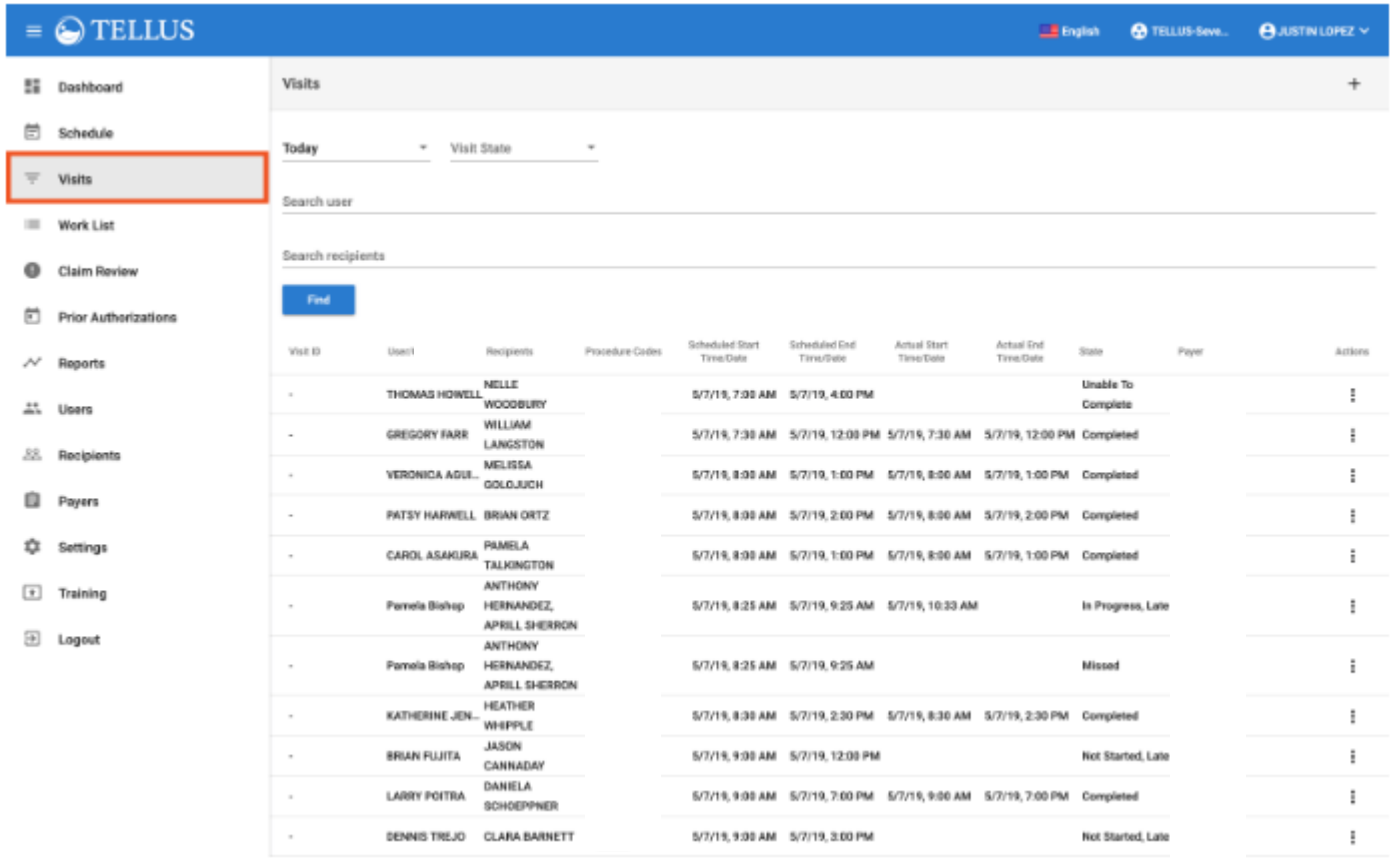
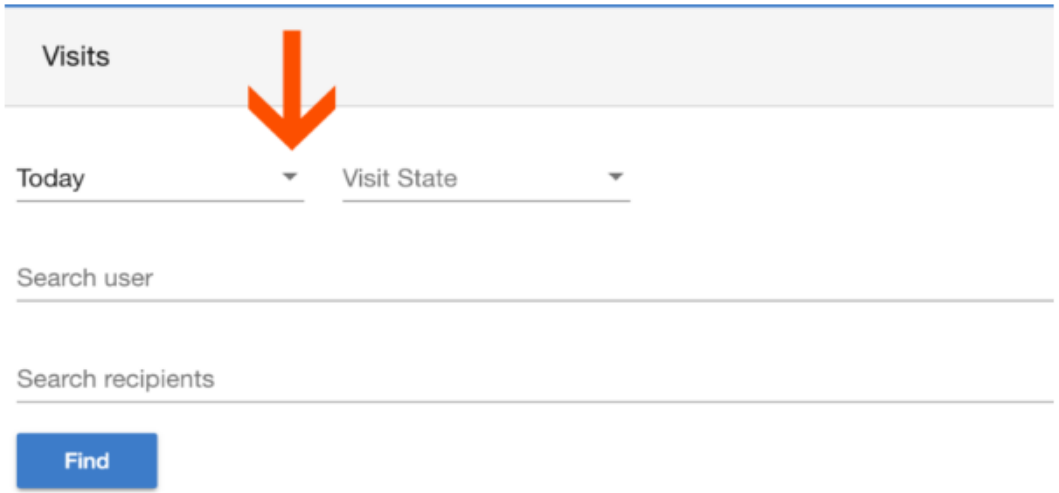
Finding a Specific Visit

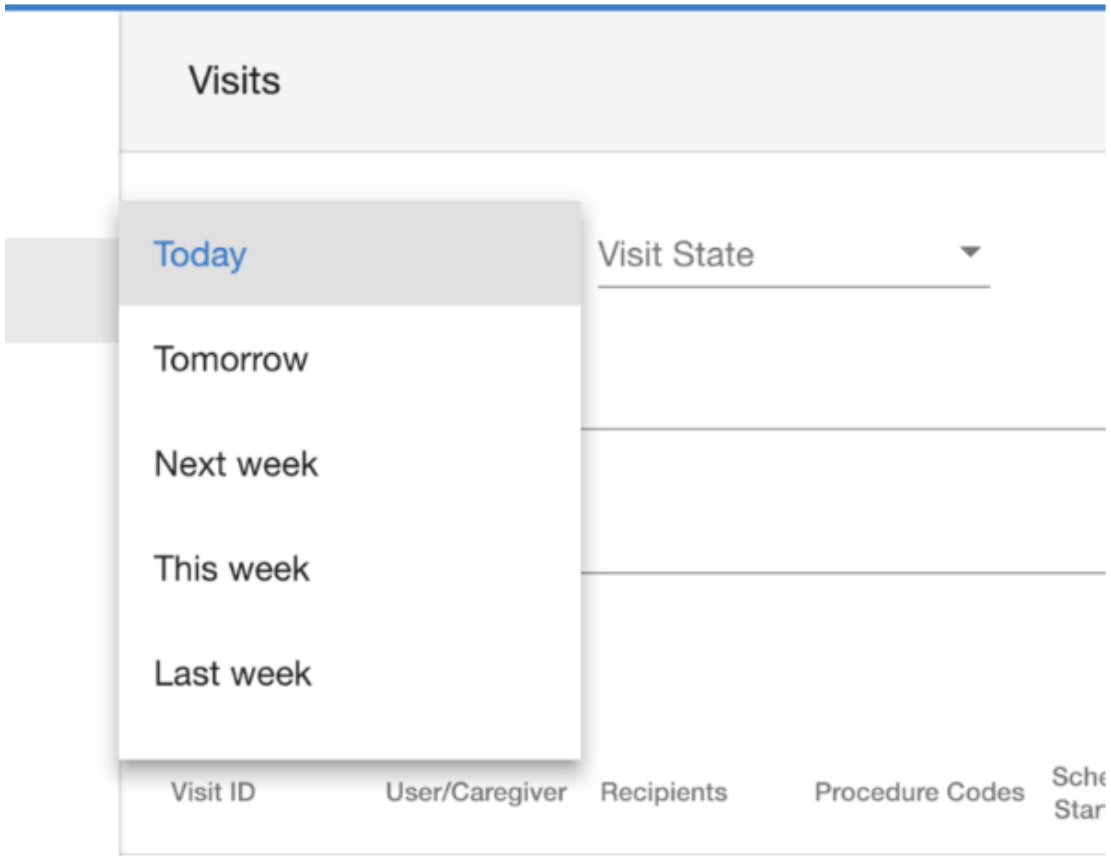
Main Menu, click **Visits**



To filter by date, click the down arrow in the date field.



Finding a Specific Visit



The default value is ***Today***, but you can select from other options in the drop-down menu:

1. Today
2. Tomorrow
3. This Week
4. Next Week
5. Last Week
6. 2 Weeks Ago
7. This Month
8. Last Month
9. Custom

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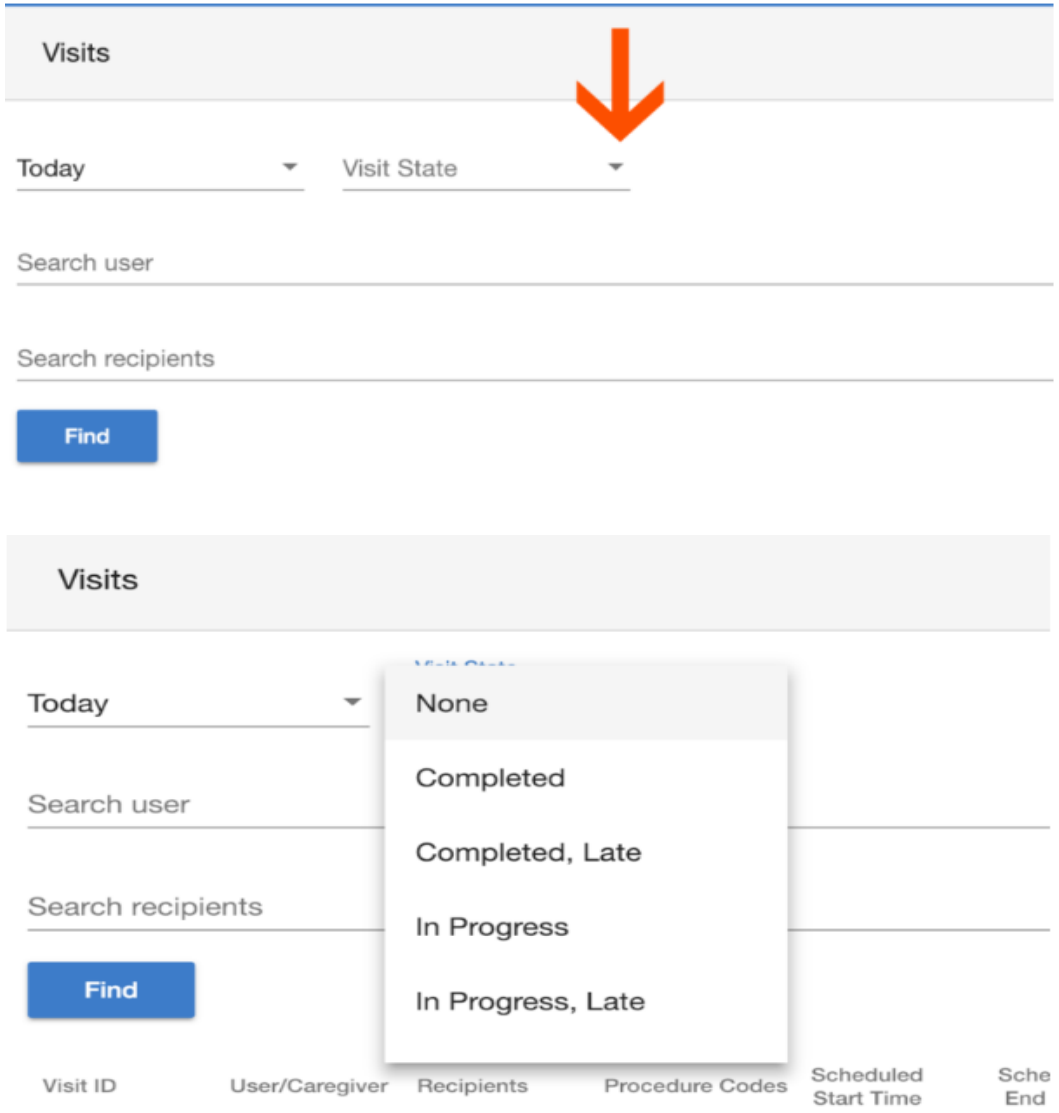
Finding a Specific Visit

Status

To filter by ***Visit status***, click the down arrow in the ***Visit State*** field



The default value is ***None*** to show all visits, but you can select from other options in the drop-down menu:

1. None
2. Completed
3. Completed, Late
4. In Progress
5. In Progress, Late
6. Missed
7. Not Started
8. Not Started, Late
9. Unable to Complete

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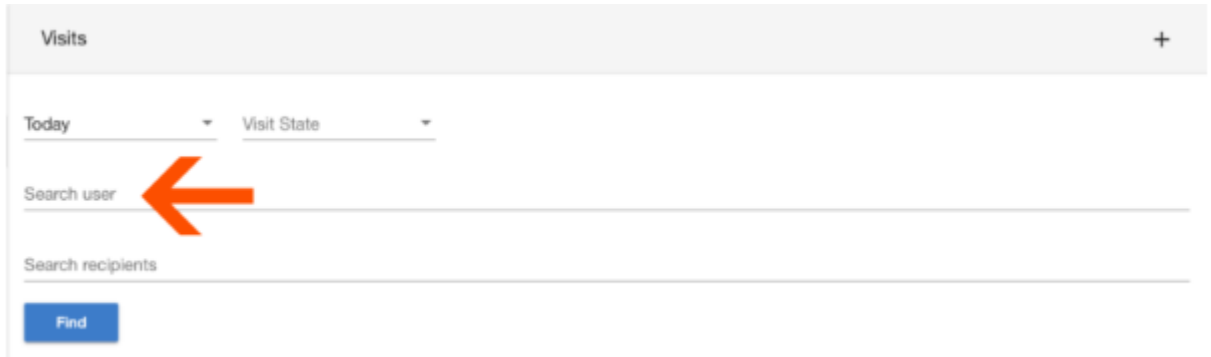
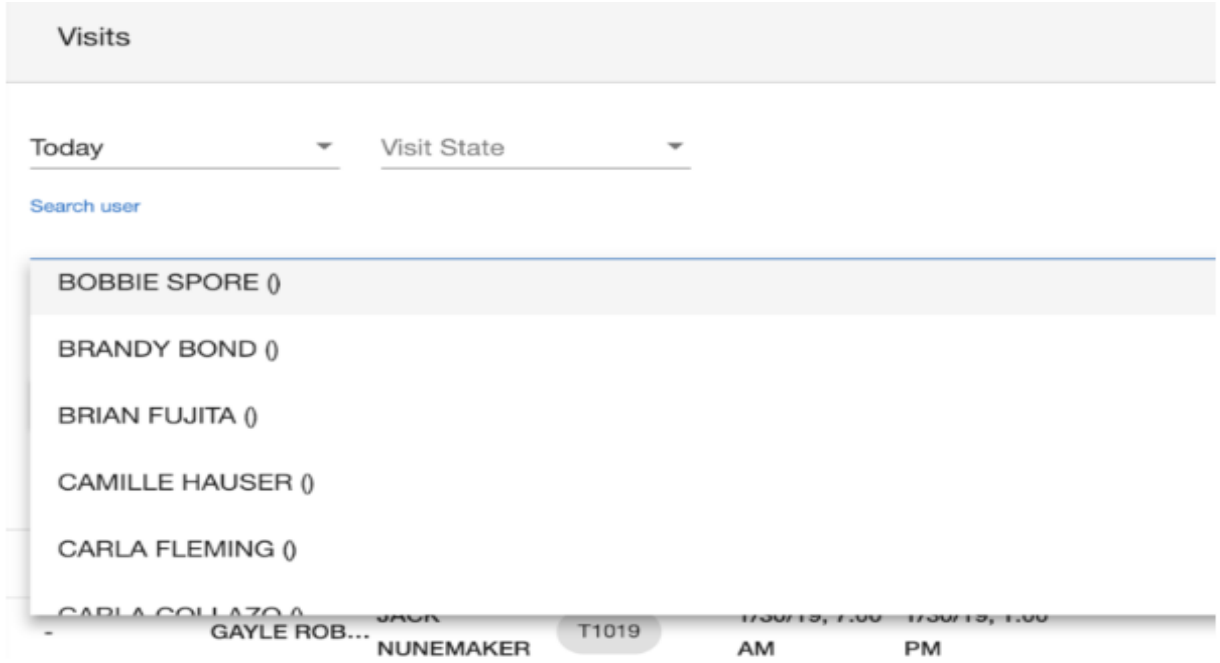
Finding a Specific Visit



To filter by ***User (Provider)***, click the ***User*** field



You can type in a name or partial name and hit enter to see names that match what you entered.

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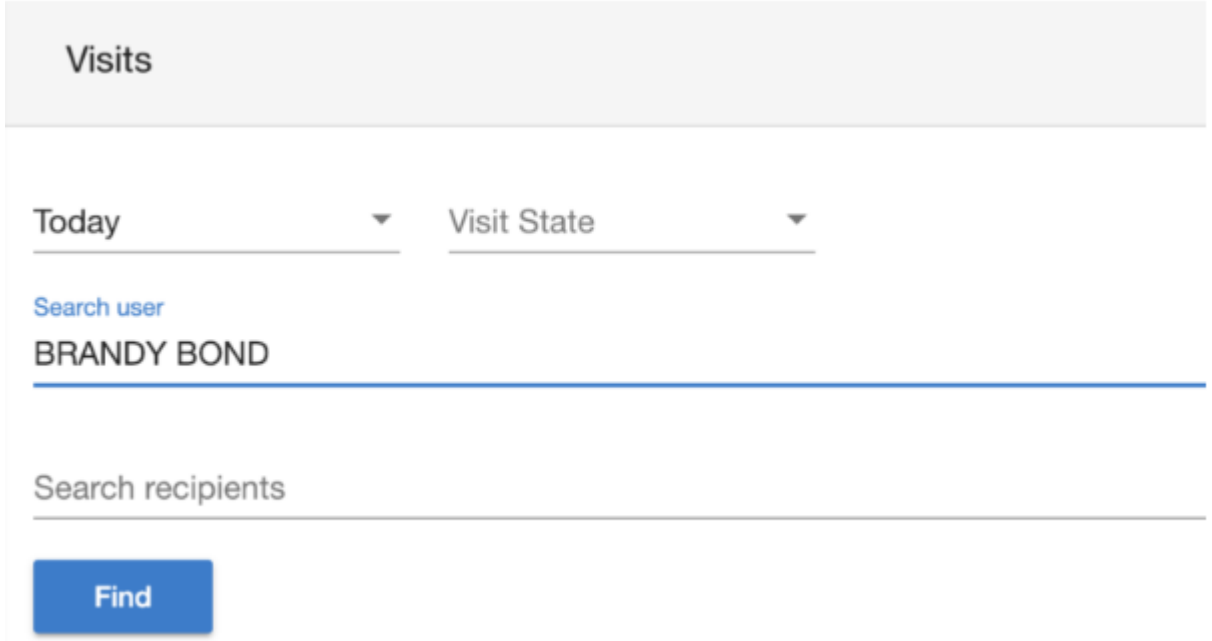
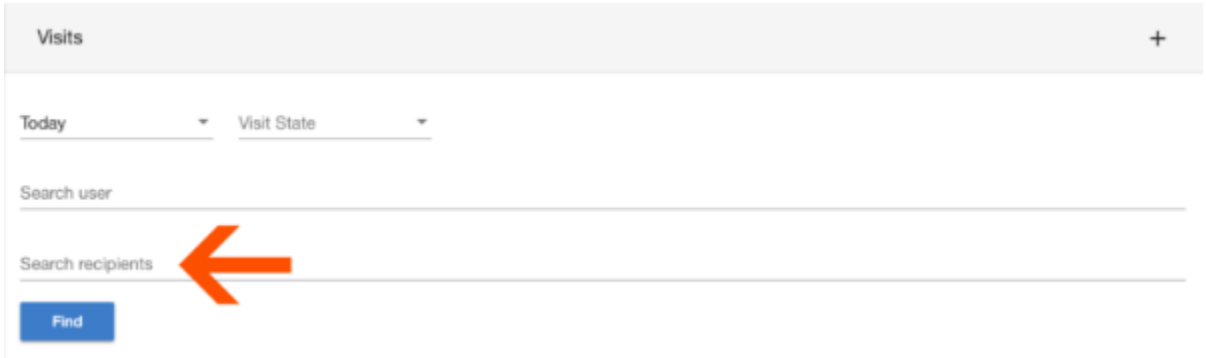
Finding a Specific Visit

Select a user name and it will be added to the list of users. For example, select Brandy Bond:



You can add additional users by repeating this process. You can remove users by clicking the “X” next to the user name you wish to remove.

To filter by ***Recipient***, click the ***Recipient*** field.



You can type in a name or partial name and hit enter to see names that match what you entered.

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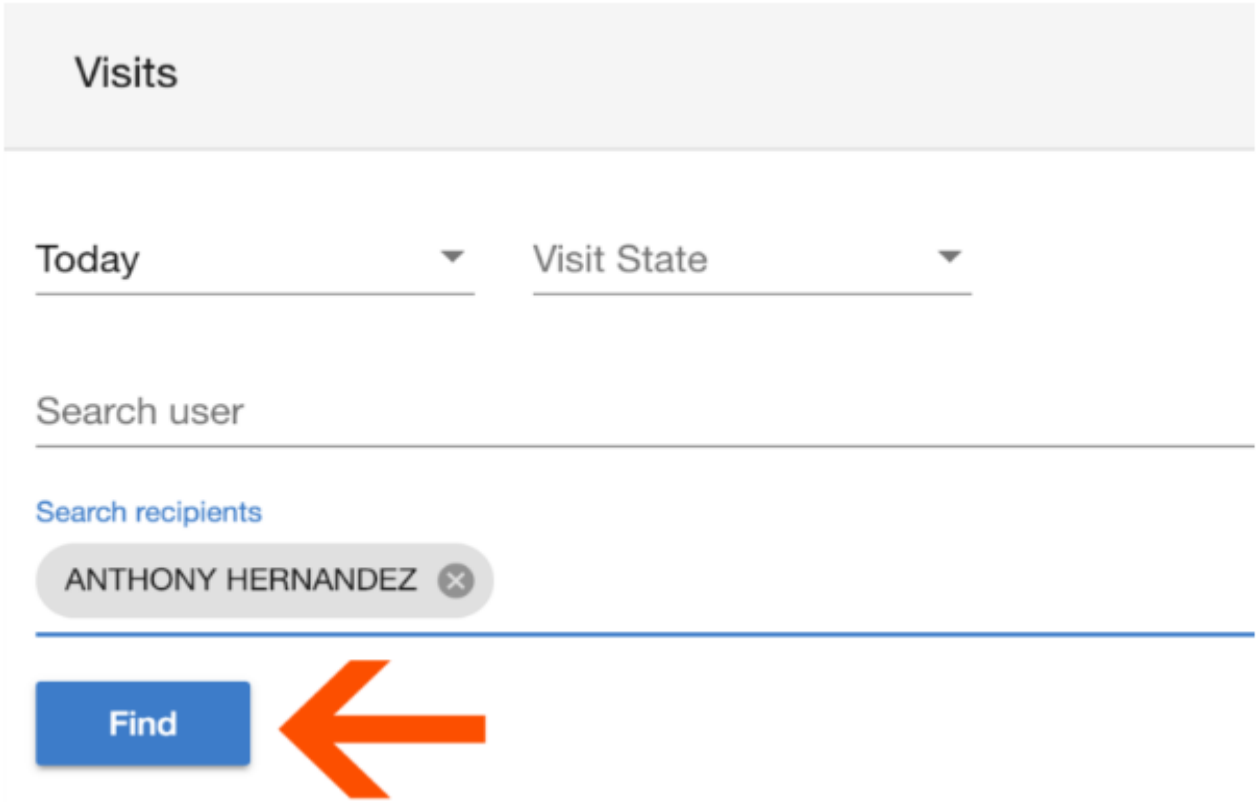
Finding a Specific Visit

Once you set all of the filter criteria, click ***Find*** to see all matching visits.



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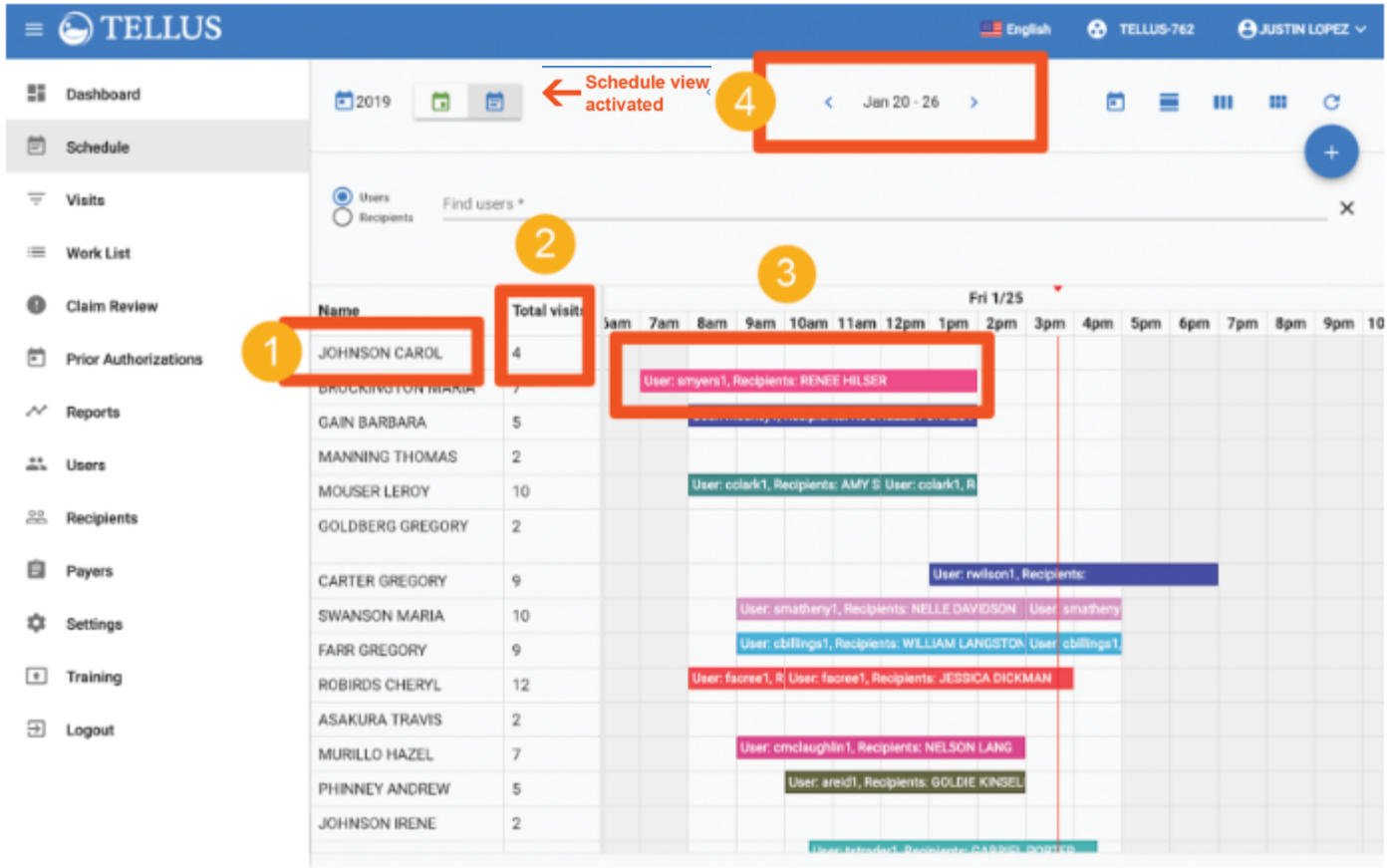
Viewing Schedule

Main Menu then click the **Schedule** option to see the **Schedule**

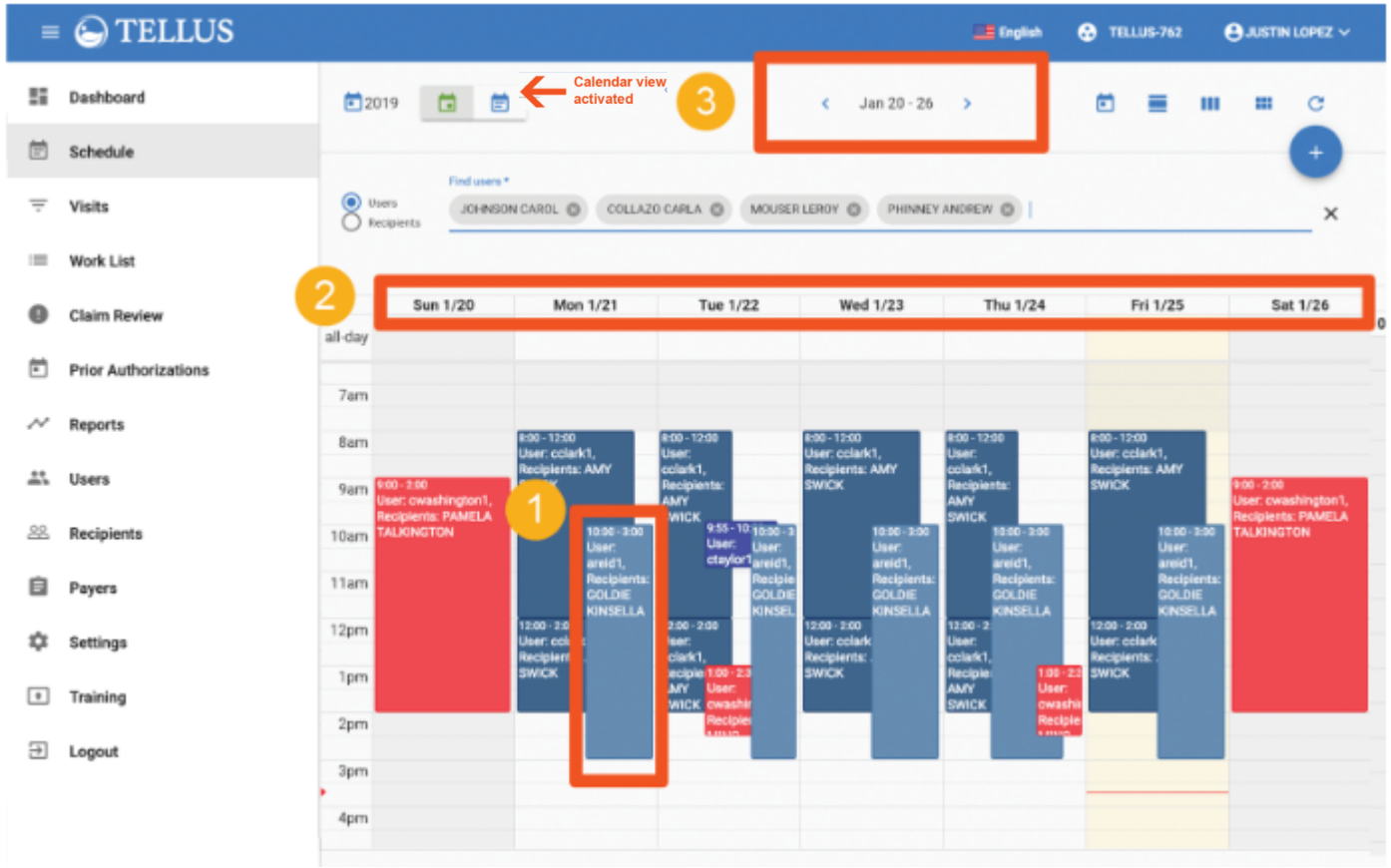


The **Scheduler view** displays scheduled visits for a searched User or Recipient within a given or specific calendar period. The **Scheduler view** will display:

1. The searched User(s) or Recipient(s) names.
2. The total number of scheduled visits for the selected calendar period for each searched User or Recipient.
3. The days and calendar dates within the selected calendar period.
4. Find users * or Find recipients * field.
5. The visits within each day that have been scheduled for each searched User or Recipient.

Viewing Schedule

You can switch to **Calendar view** by clicking the calendar icon in the upper left:

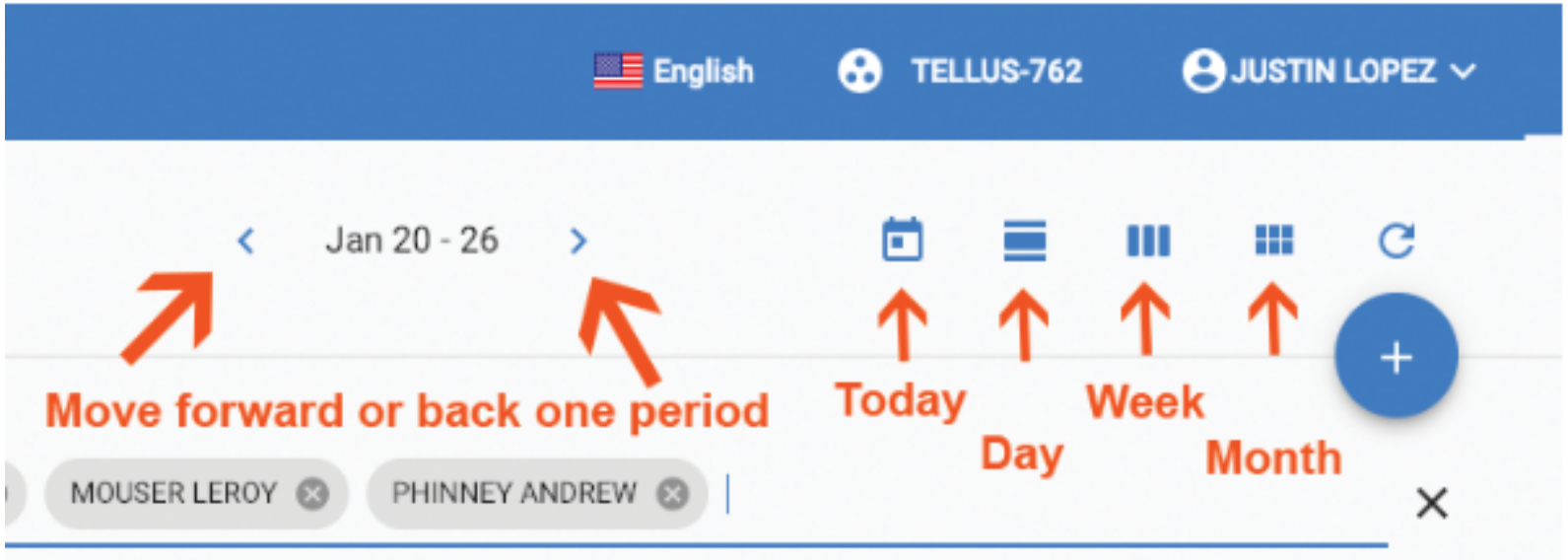


The **Calendar view** displays all scheduled visits within a calendar period for a searched User or Recipient. The **Calendar view** displays:

1. The searched User(s) and Recipient(s) names for each scheduled visit for every day
2. The calendar day or days and dates within the selected calendar period
3. The selected calendar period; e.g., month or week.

Viewing Schedule

General Navigation for Scheduler / Calendar View



You can select the time period for the displayed Schedule by clicking the icons at the top right. These icons display the following calendar periods:

1. Today
2. Day
3. Week
4. Month

Once you select a calendar period, you can scroll forward and backward by using the ***<previous*** or ***next >*** carets (arrows).

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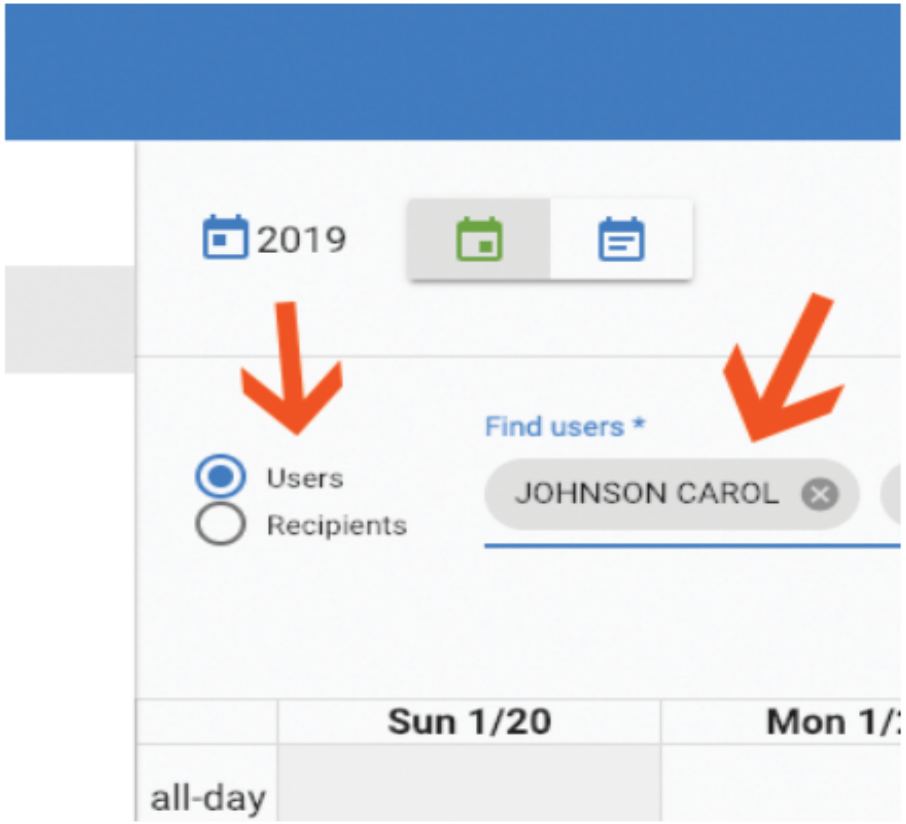
Viewing Schedule



You can filter results by clicking the ***Find users** ** or ***Find recipients** ** field in the filter dialog. Filter by Users (Providers) and Recipients by toggling the radio buttons. When you click the field, you will see a pull-down menu containing a list of **Users** or **Recipients** that can be selected. Multiple **Users** or **Recipients** can be selected one at a time.

Click the “X” to clear all selected names from the **Find users *** or **Find recipients *** field.
You can add a visit directly from the ***Schedule*** page by clicking the add visit icon in the upper right.

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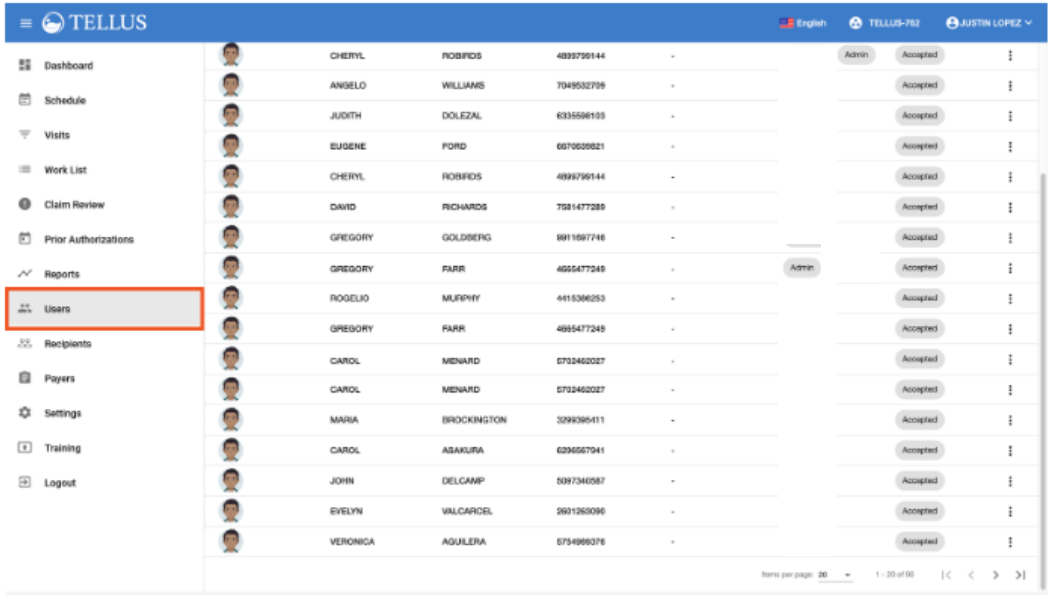
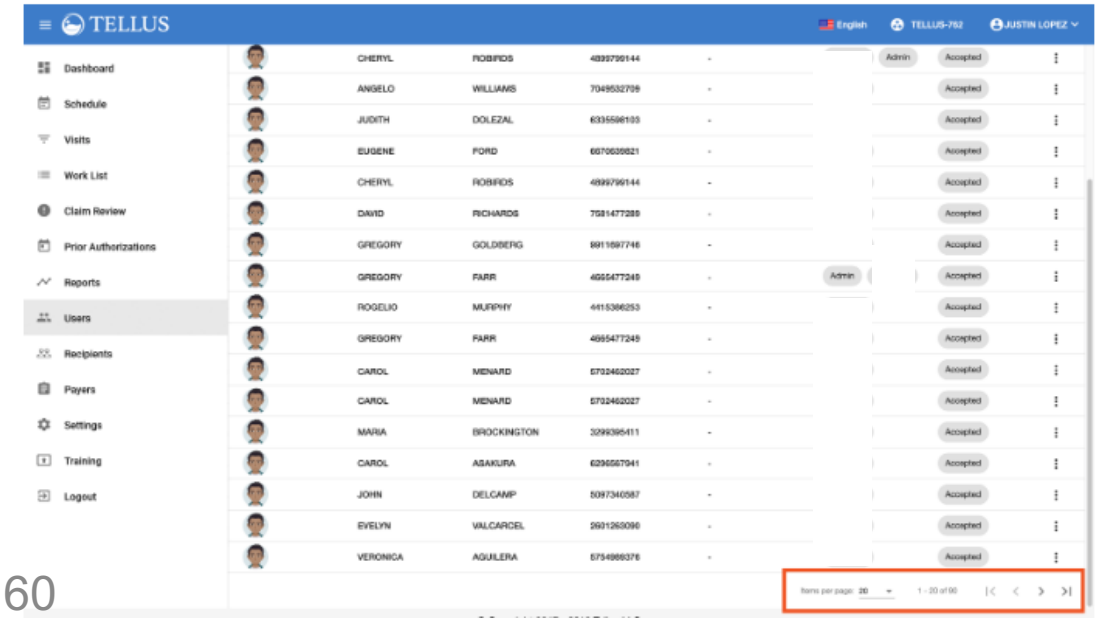
Managing/Viewing Users





Main Menu and click **Users**

The **Users** page opens and displays the following information for all Users:

1. Profile picture
2. First name
3. Last name
4. Phone
5. Email
6. Role
7. Invite Status

You can elect to display 20, 50, or 100 Users per page. To change this value click the pull-down arrow next to the ***Items per page*** field.

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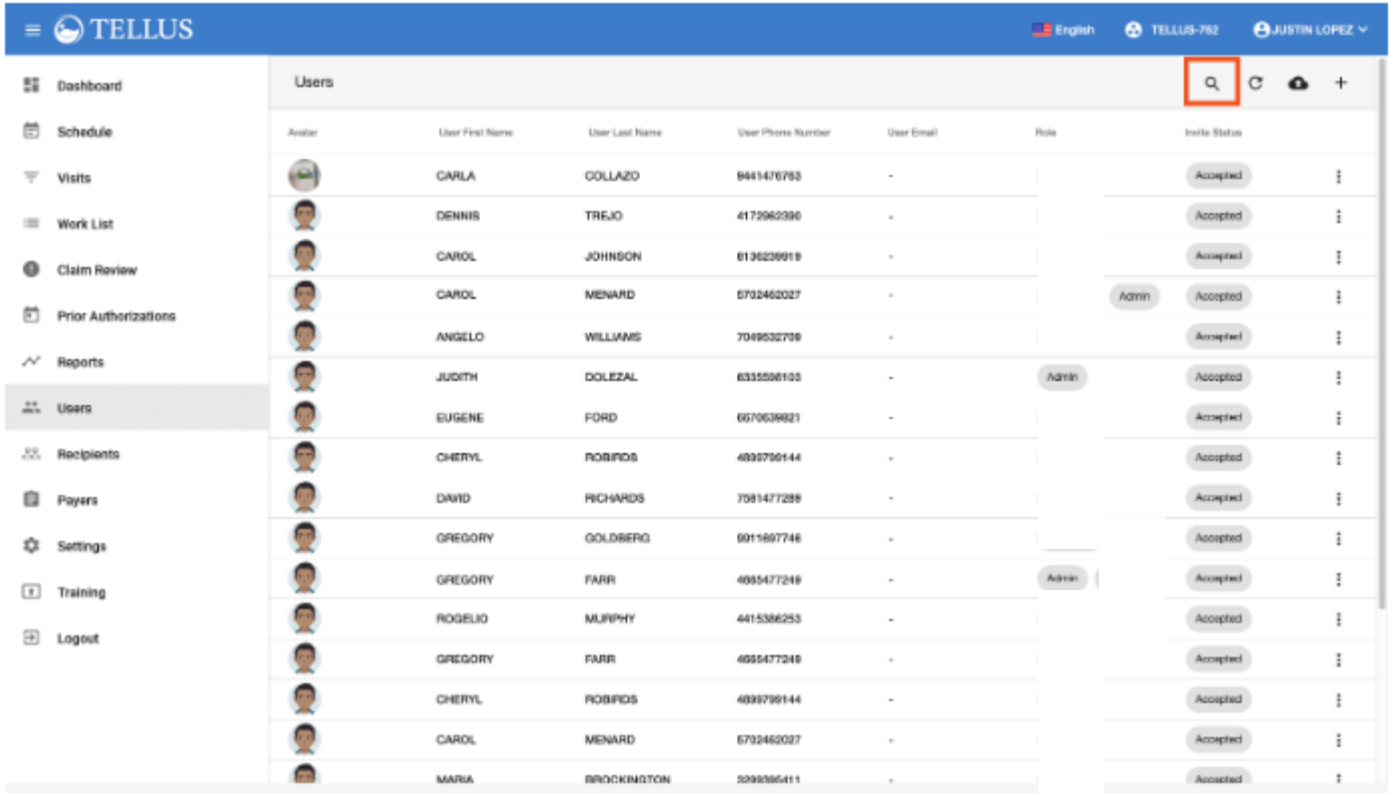
Managing/Viewing Users

You can search for a specific User using the ***Search for user*** field.



Enter a few characters of the User's name into the ***Search for user*** field and hit enter.

All Users who match the search text will be presented. For example, the search text "ja" returns Users Janelle and James.

Click the "X" to clear the search field and return to viewing all Users.

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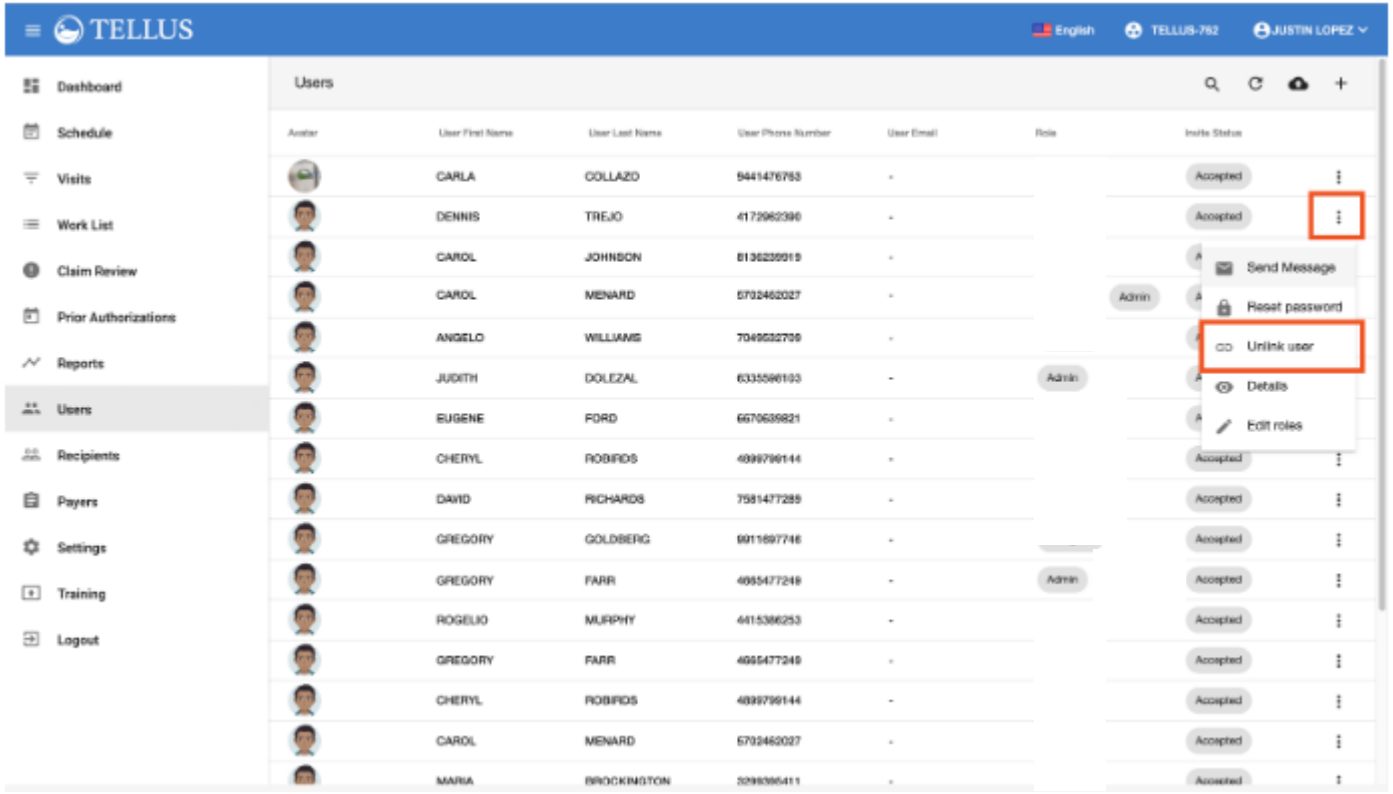
Unlinking / Removing Users

Unlink a User from the **Users** page.

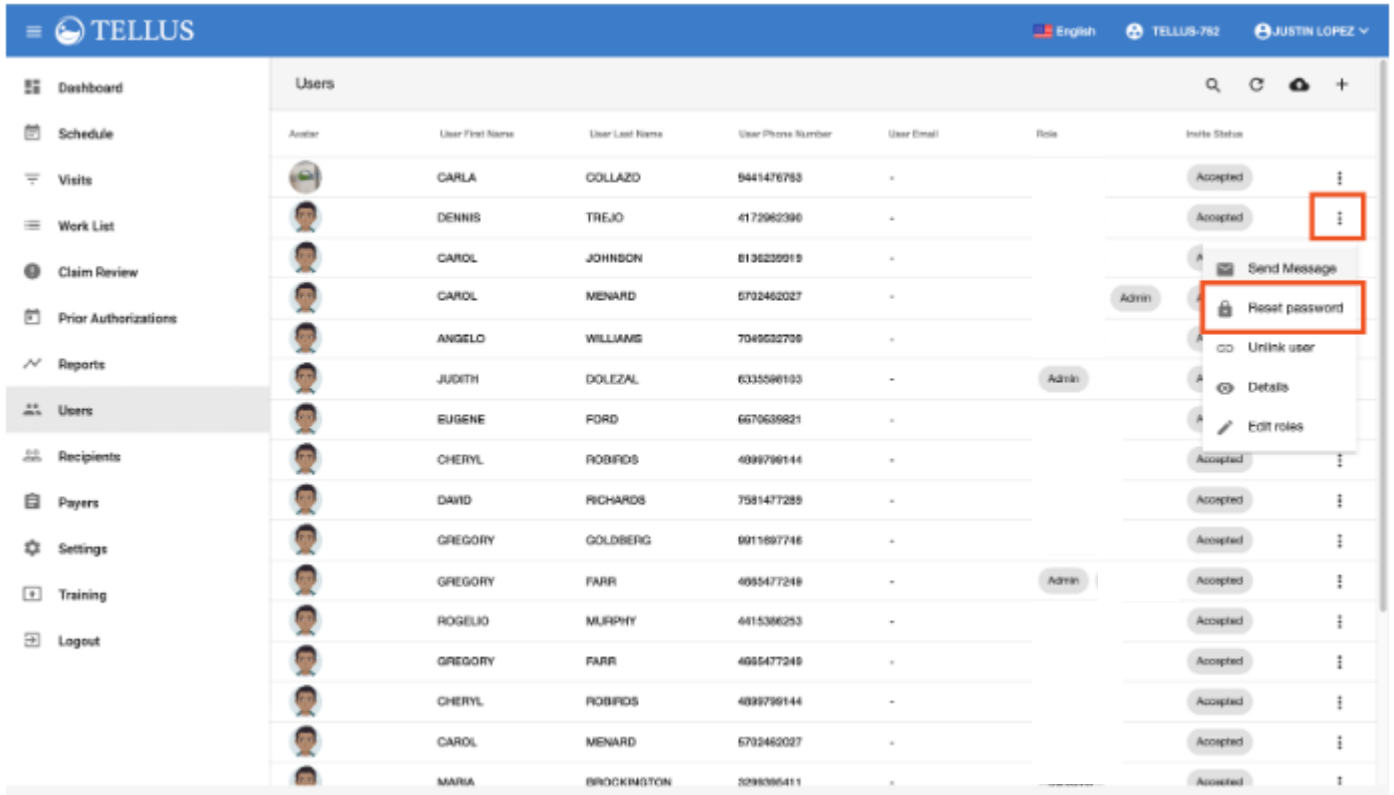


Click the submenu icon to see a list of actions that can be performed to a listed User. Select ***Unlink user***.

A dialog will pop-up asking you to send a message to that User, but first, you must select another User to reassign the first User's tasks to. After you search for a User to reassign the tasks to, click ***Reassign tasks and unlink user***. The User will be unlinked. Click ***Cancel*** to exit the pop-up without making changes.

Resetting User Passwords

Reset a User's password from the **Users** page.



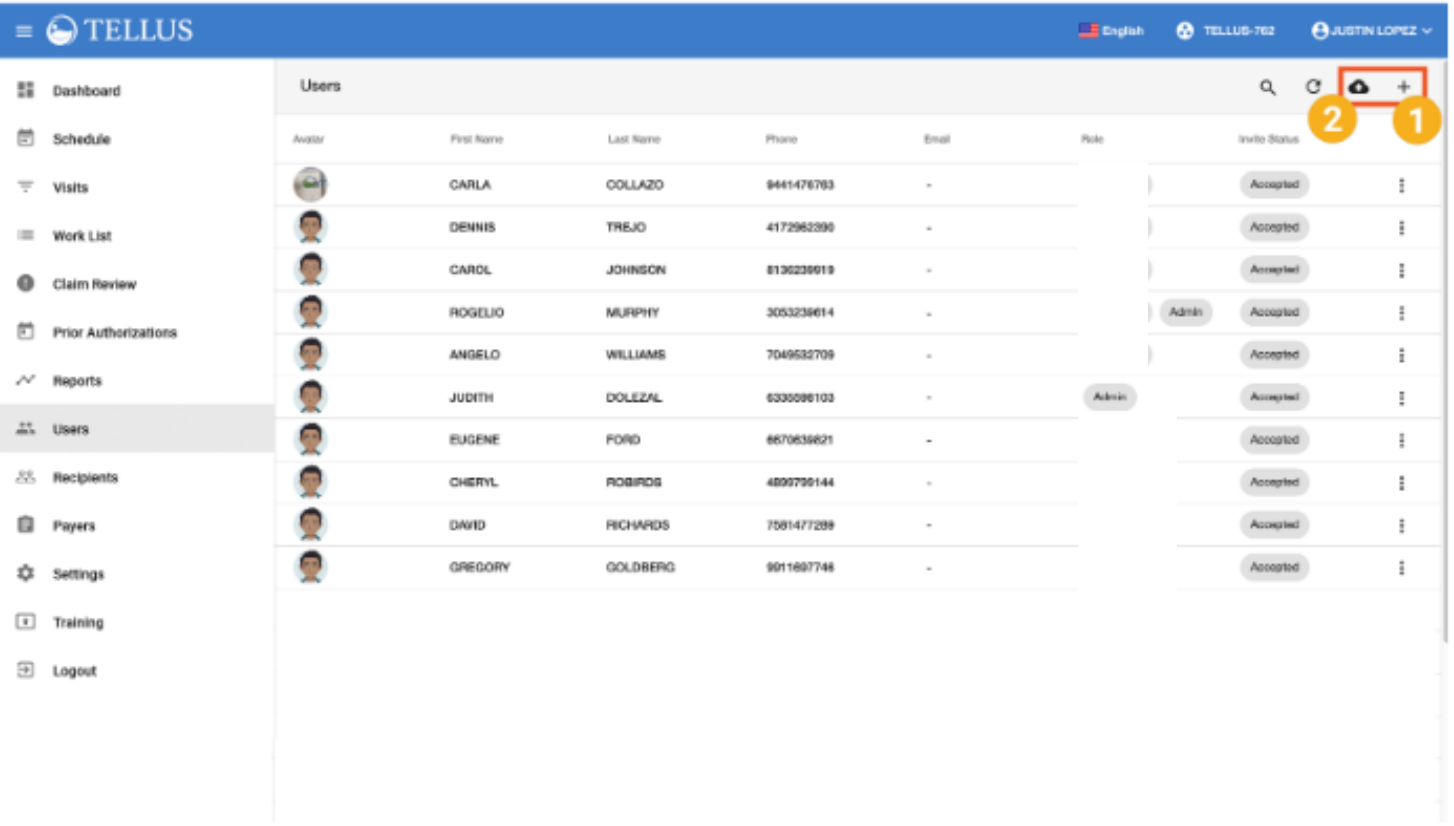
The ***Reset password*** pop-up opens asking if you're sure you want to reset the password for the User.

Click ***Reset Password*** to reset the User's password and return to the **Users** page.

Click **Cancel** to exit the pop-up without making changes.

The User's account status will change to **Force change password,** which is an inactive state. The User will receive a notification via their password reset method (e.g., SMS or email) with the temporary password. The next time this User attempts to login, they will be prompted to enter a new password.

Managing/Viewing Users



Phone: Enter the new User's phone number. (This feature can be used for notification and password reset purposes.) Only numeric characters can be entered. It is not necessary to add parenthesis or hyphen characters, as this is done automatically as numbers are entered.

Email: Enter the new User's valid email address. (This feature can be used for notification and password reset purposes.) Once the User accepts the invitation, you can return to the User page to set their role. The default role is Provider. A User can be either:

- Admin
- Provider
- Monitor

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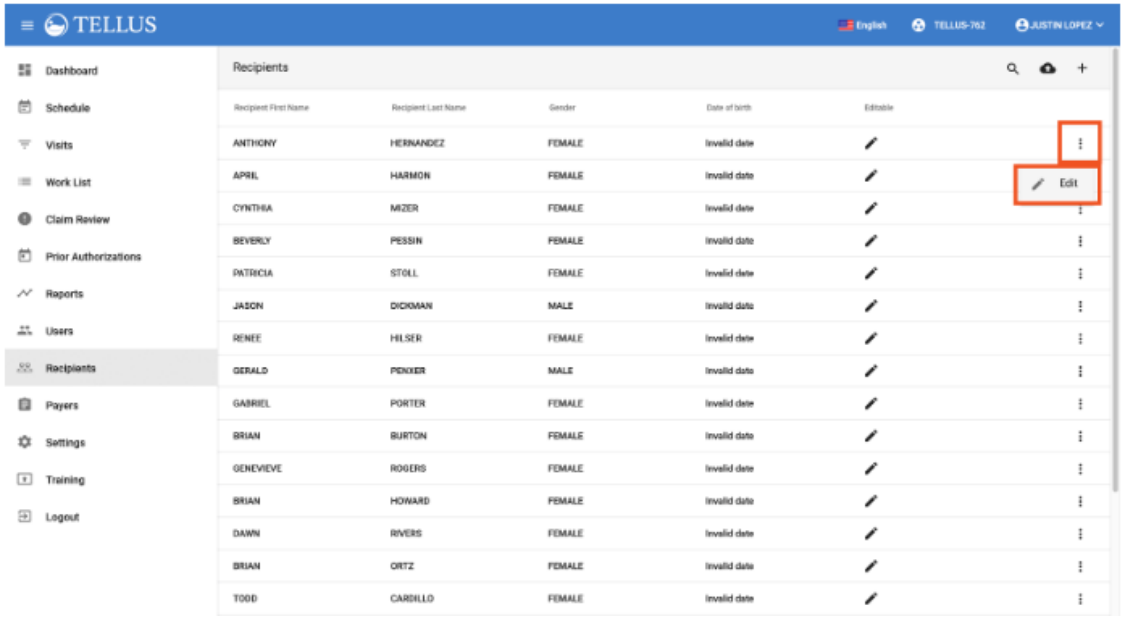
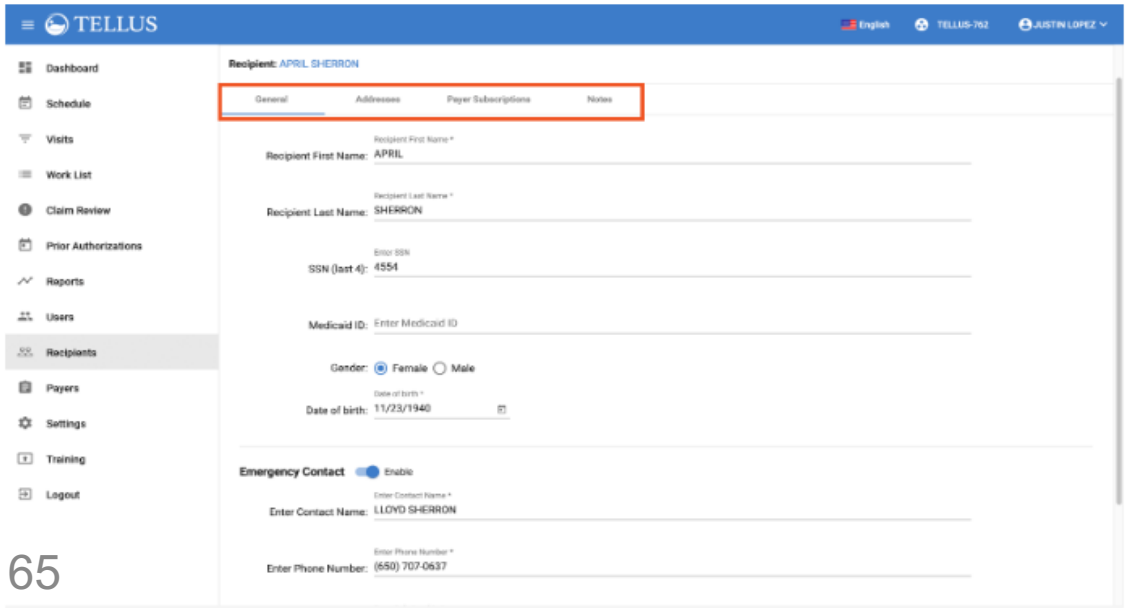
Managing Recipient Addresses





Main Menu and click Recipients to see the **Recipients**

The **Edit recipient** page displays the saved data for a Recipient. Four tabs can be reviewed or edited:

- General
- Addresses
- Payer Subscriptions
- Notes

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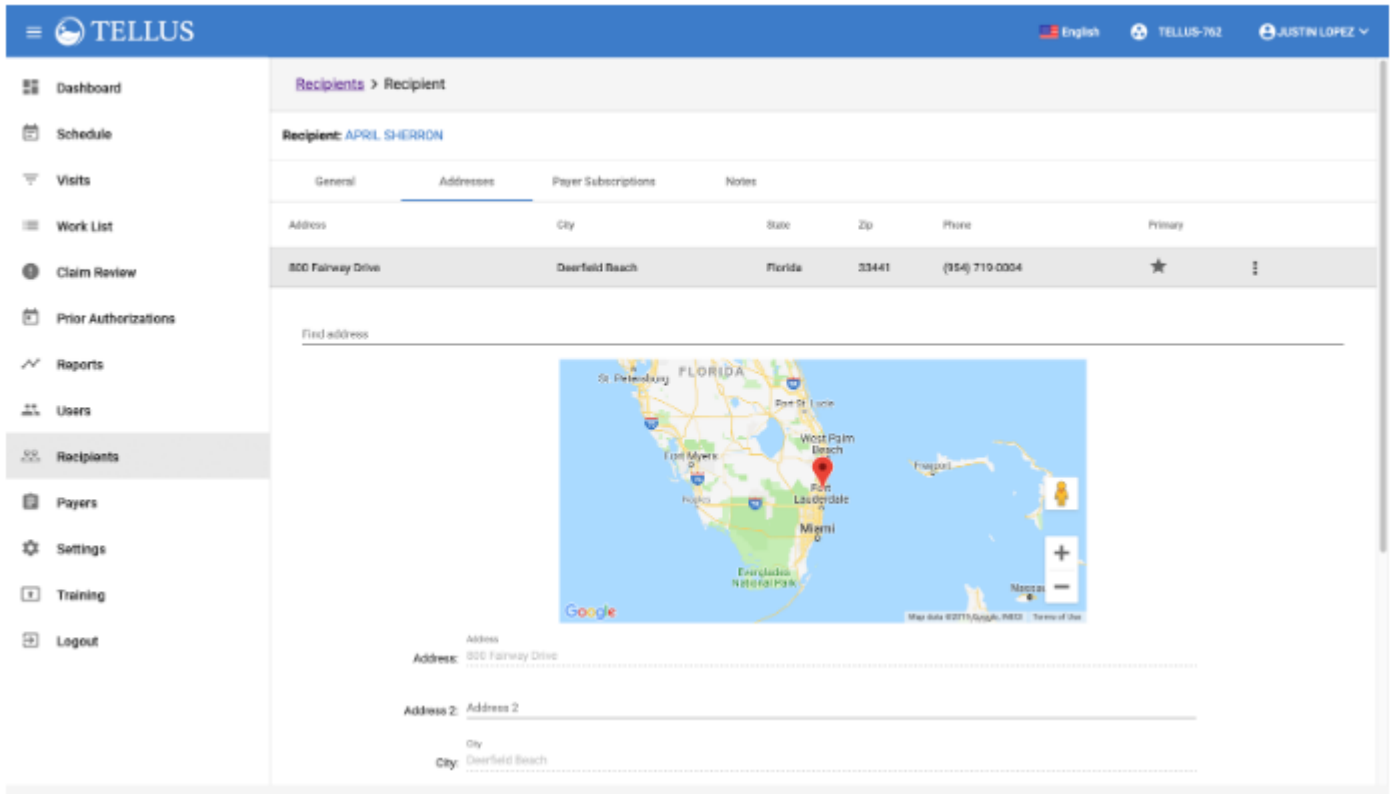
Managing Recipient Addresses

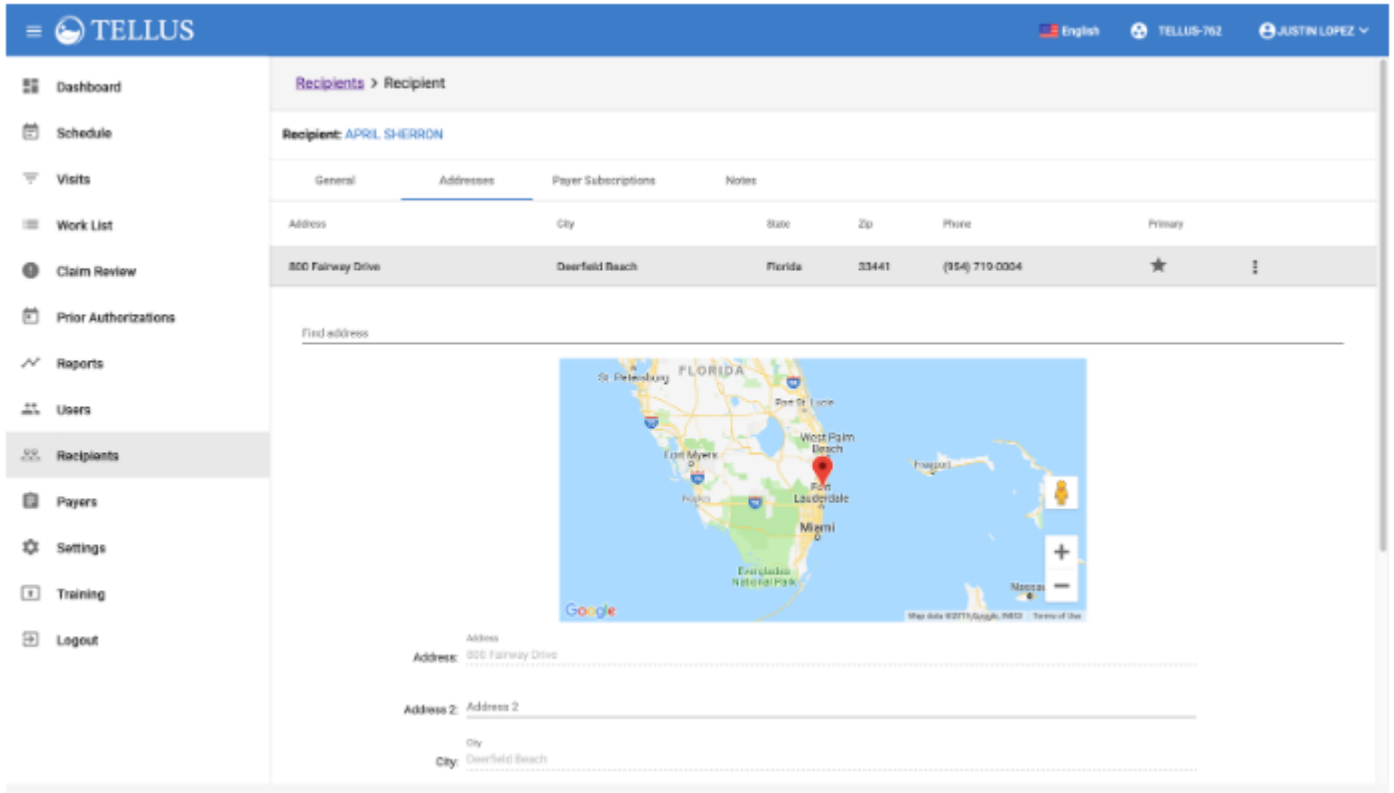


Enter the address in the ***Find Address*** field. As the address is being entered, possible matches will appear in a drop-down list. The map will update to show the address. Be sure to add a Primary Phone number.

The recipients home address received from AHCA will automatically be set to Primary. If you add more addresses, you will be able to toggle ***Select as Primary toggle*** to the right or left.

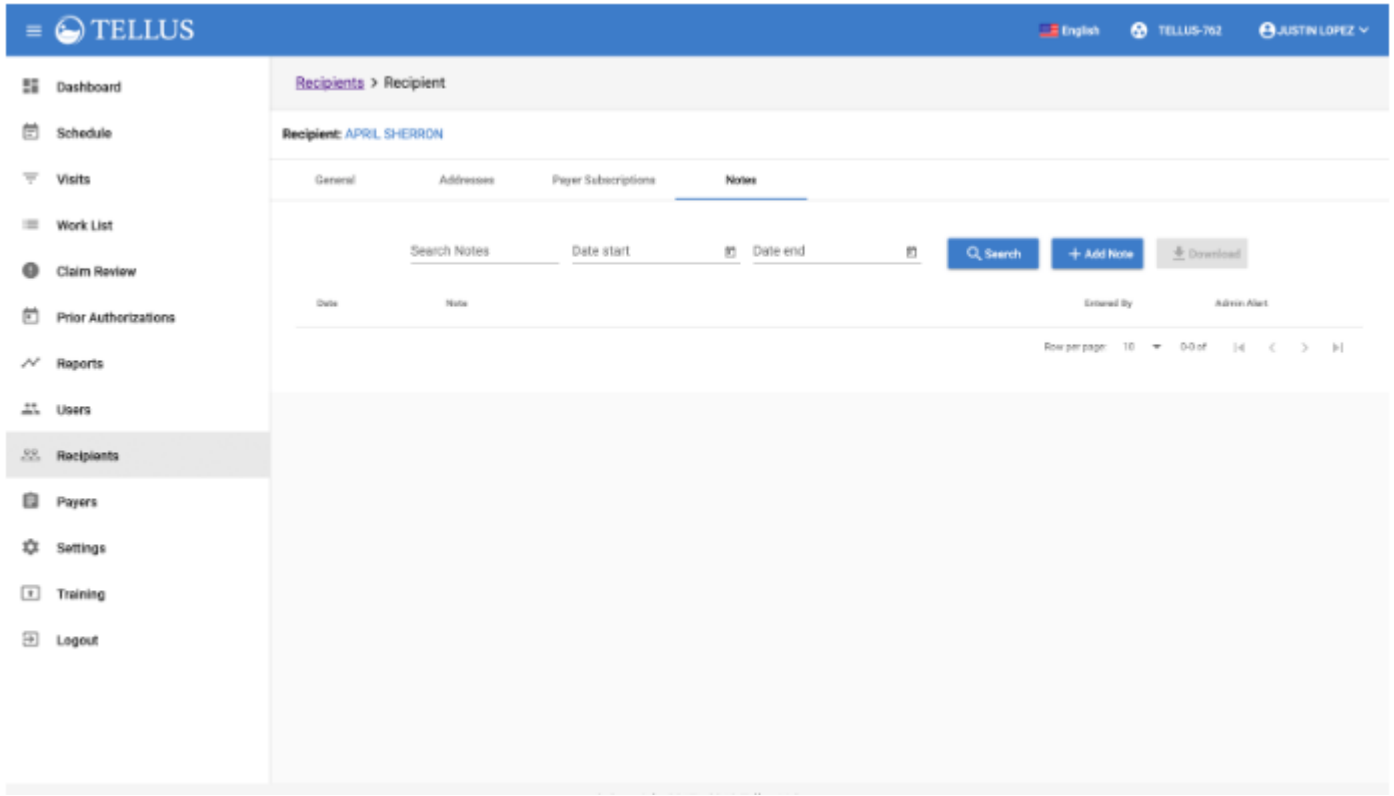
Managing Recipient Addresses

The following fields will be auto populated if ***Find Address*** was able to find a matching address. If not, enter the information.



***Address*:** Enter the primary street address; e.g., 100 Main Street.
***Address 2*:** Enter any apartment number, suite number or additional part of the address.
***City*:** Enter the name of the city where the Recipient lives. This will be for the primary street address.
***State*:** Enter the name of the state where the Recipient lives. This will be for the primary street address.
Zip*:** Enter the zip code of the location where the Recipient lives. This will be for the primary street address.
Primary Phone*:** Enter the Recipient's primary phone number.
***Secondary Phone*:** Enter the Recipient's secondary phone number, if available.

Managing Recipient Notes



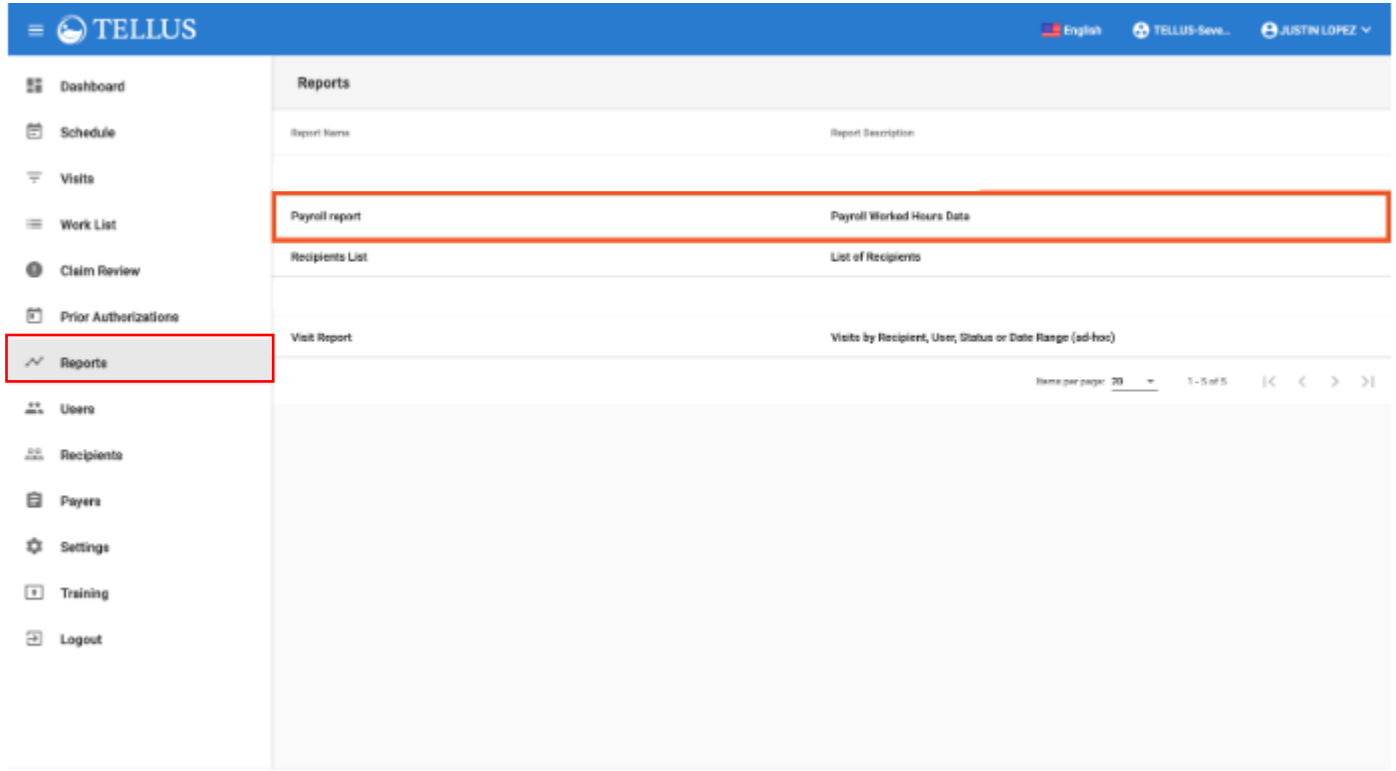
The Notes tab allows you see all notes entered for a Recipient. You can search by entering information you want to search or by entering a beginning and an ending date to search.

You can also add a note by clicking the ***+Add Note*** button. You can download notes by clicking the ***Download*** button.

Viewing Payroll Report

Main Menu and click **Reports**.

Click ***Payroll report***.



The following columns will be included in the ***Payroll report***.

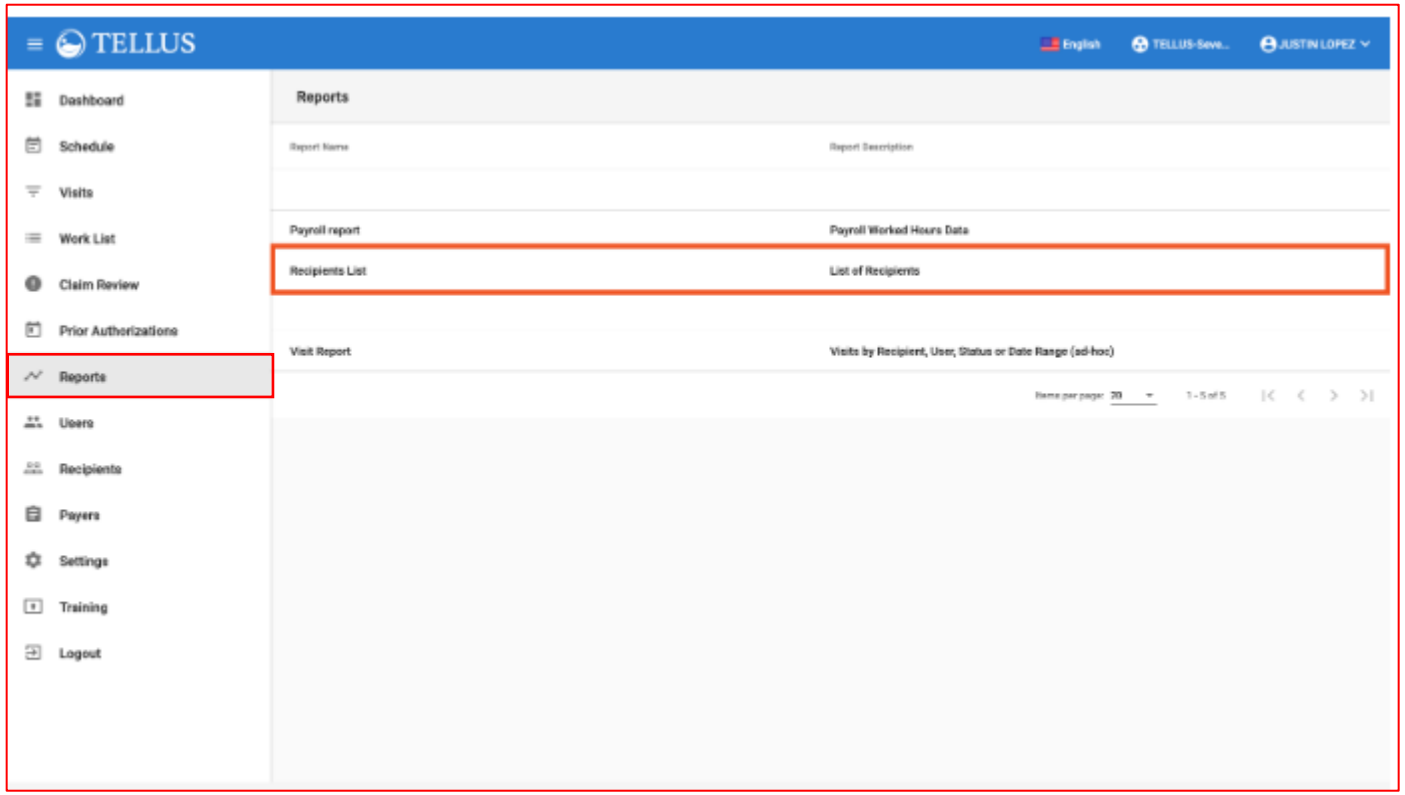
1. Provider Name
2. Recipient Name
3. Procedure Code
4. Scheduled Start Time
5. Scheduled End Time
6. Scheduled Hours
7. Actual Start Time
8. Actual End Time
9. Actual Hours
10. Billable Start Time
11. Billable End Time
12. Billable Hours
13. Billable Actual Hours

To change the format, filter or sort order of the report, click the column you want to change. To export, click ***Export*** above the report and select the format you want to export. You can also zoom in or zoom out by clicking the corresponding magnifying glass.
In the left-hand column, you can update the report by filtering by date range, Recipient or Provider.

Viewing Recipient List Report

Main Menu, and click **Reports**.

Click **Recipients List**.



The following columns will be included in the ***Recipient List*** report.

1. Account Name
2. Recipient Line Number
3. Recipient Name
4. Date of Birth
5. Gender
6. Recipient Address
7. Recipient Phone Number
8. Emergency Contact Name
9. Emergency Contact Phone
10. Requires Attention

To change the format, filter or sort order of the report, click the column you want to change. To export, click ***Export*** above the report, and select the format you want to export. You can also zoom in or zoom out by clicking the corresponding magnifying glass.

In the left-hand column, you can update the report by filtering by Recipient or Gender.

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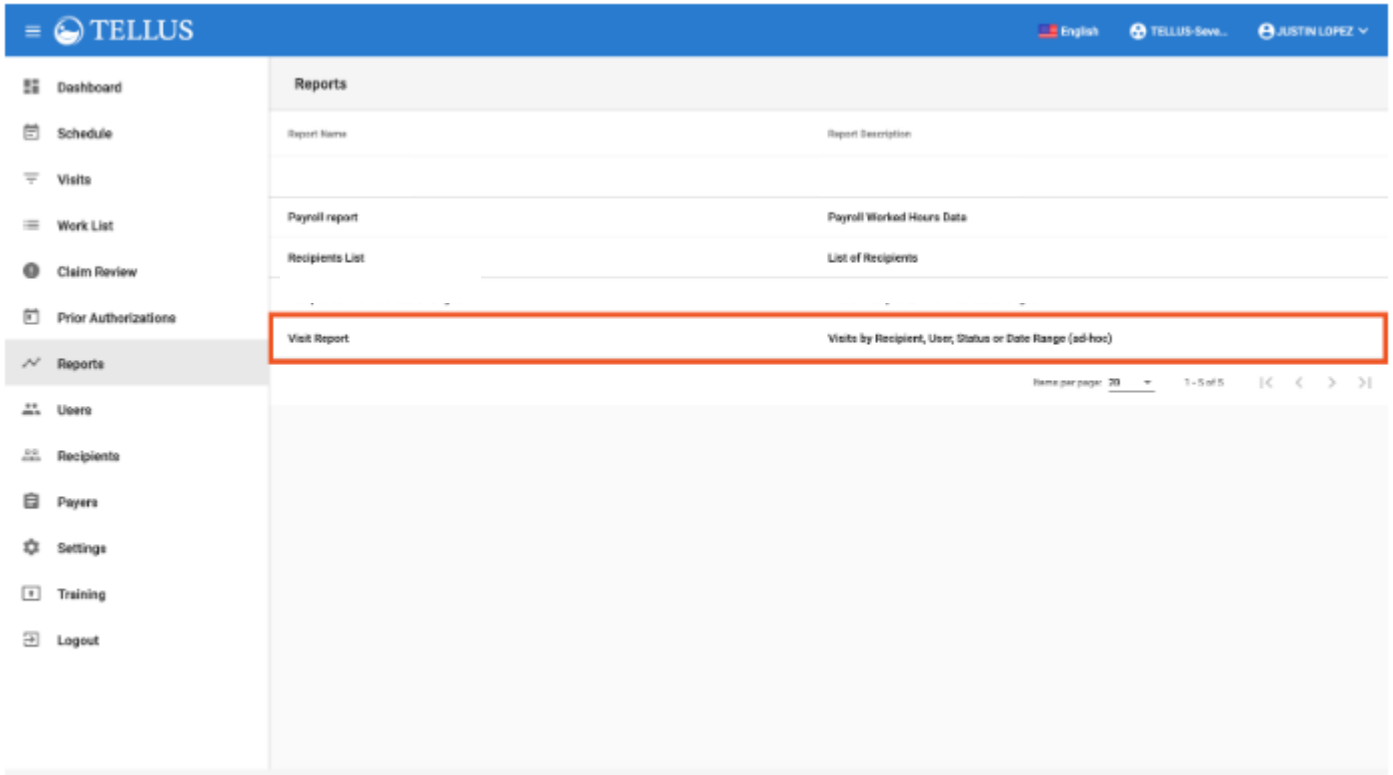
Viewing Visit Report

Main Menu, and click **Reports**.

Click **Visit Report**.

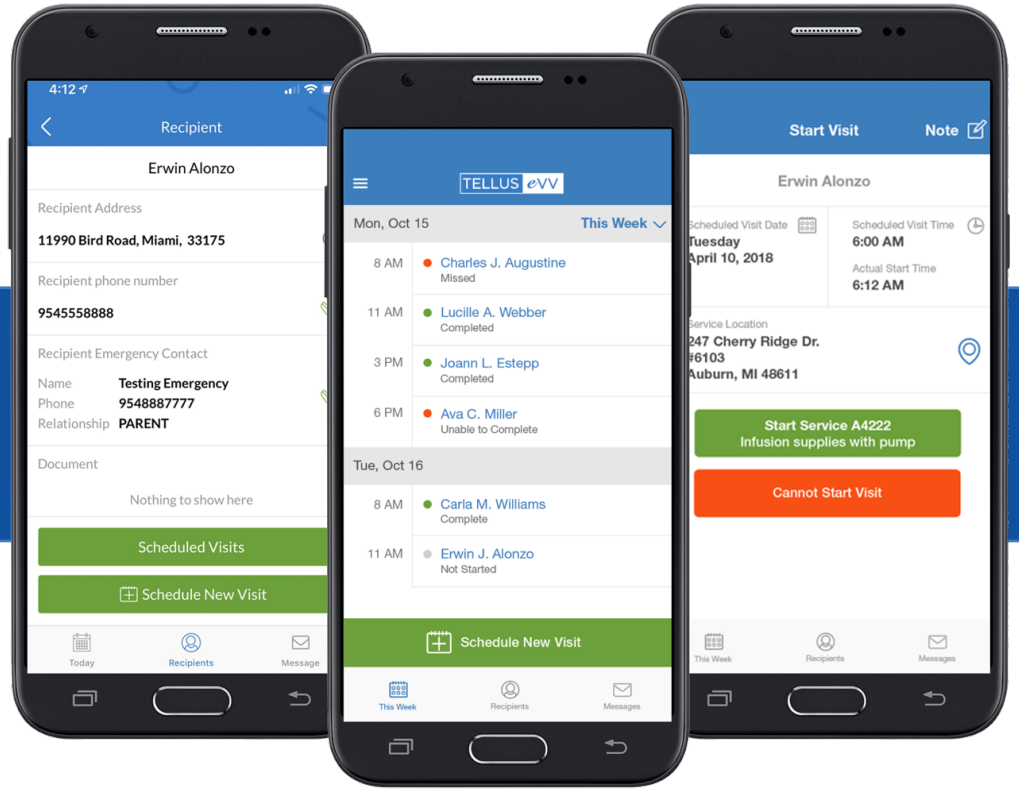


The following columns will be included in the **Visits Report**.

1. User Name
2. Recipient Name
3. Date of Birth
4. Gender
5. Recipient Address
6. Visit Start time
7. Visit End time
8. Actual Start Time
9. Actual End Time
10. Status

To change the format, filter or sort order of the report, click the column you want to change. To export, click ***Export*** above the report, and select the format you want to export. You can also zoom in or zoom out by clicking the corresponding magnifying glass.

In the left-hand column, you can update the report by filtering by date range, Provider, Recipient or Status.



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