



Tellus EVV Admin User Guide

Version 1.2

Contents

| | |
|--|----|
| Terminology | 5 |
| Getting Started..... | 7 |
| General Requirements..... | 8 |
| Logging In..... | 10 |
| Administrator Console Overview: Viewing the Dashboard..... | 13 |
| Viewing the Main Menu..... | 17 |
| Changing Refresh Settings..... | 20 |
| Commonly Used Icons and Controls..... | 21 |
| Selecting Times using the Clock Icon..... | 24 |
| Selecting Dates using the Calendar Icon..... | 25 |
| Logging Out..... | 28 |
| Acronyms..... | 30 |
| Using the Dashboard..... | 31 |
| Accessing Visit Status Detail..... | 32 |
| Accessing Weekly Visits Detail..... | 34 |
| Viewing Inbox Alerts..... | 36 |
| Viewing Claims Information..... | 39 |
| Managing Visits..... | 42 |
| Searching for and Viewing Visits..... | 43 |
| Viewing Visits..... | 44 |
| Changing the Number of Visits Displayed Per Page..... | 45 |
| Searching for a Specific Visit..... | 46 |
| Viewing Visit Details..... | 49 |
| Completing a Visit..... | 52 |
| Canceling a Missed or Late Visit..... | 56 |
| Updating a Visit..... | 58 |
| Printing Visit Detail..... | 61 |

| | |
|---|---------------------|
| Deleting a Visit..... | 63 |
| Scheduling..... | 64 |
| Viewing the Schedule..... | 65 |
| Scheduler View: Overview..... | 66 |
| Calendar View: Overview..... | 67 |
| General Navigation for Scheduler or Calendar View..... | 68 |
| Adding or Scheduling a Visit..... | 70 |
| Adding a Visit: Entries..... | 71 |
| Managing Users..... | 77 |
| Viewing Users..... | 78 |
| Viewing Users..... | 79 |
| Changing the Number of Users Displayed per Page..... | 81 |
| Searching for a Specific User..... | 82 |
| Viewing User Detail..... | 85 |
| Adding a New User..... | 87 |
| Inviting an Existing User to your Agency..... | 91 |
| Importing a Group of New Users..... | 93 |
| Completing the New User Spreadsheet..... | 94 |
| Importing the New User Spreadsheet..... | 95 |
| Sending a Message to a User..... | 99 |
| Resetting User Passwords..... | 101 |
| Unlinking and Removing Users from Tellus EVV and Reassigning Tasks..... | 103 |
| Updating User Detail..... | 105 |
| Editing User Roles..... | 108 |
| Managing Recipients..... | 111 |
| Searching for and Viewing Recipients..... | 113 |
| Viewing Recipients..... | 114 |
| Changing the Number of Recipients Displayed Per Page..... | 116 |
| Searching for a Specific Recipient..... | 117 |

| | |
|---|----------------------------|
| <u>Adding a New Recipient.....</u> | <u>119</u> |
| <u>Adding a Recipient: Entries (Available if allowed by program)</u> | <u>122</u> |
| <u>Importing a Group of New Recipients</u> | <u>127</u> |
| <u>Completing the Spreadsheet</u> | <u>128</u> |
| <u>Importing the Spreadsheet</u> | <u>129</u> |
| <u>Editing a Recipient</u> | <u>132</u> |
| <u>Updating General Recipient Information.....</u> | <u>134</u> |
| <u>Updating Addresses</u> | <u>135</u> |
| <u>Updating Payer Subscriptions (User to contact Tellus customer service).....</u> | <u>140</u> |
| <u>Entering Notes.....</u> | <u>143</u> |
| <u>Entering a Referring Physician</u> | <u>145</u> |
| <u>Uploading Documents for a Recipient.....</u> | <u>148</u> |
| <u>Managing Uploaded Document.....</u> | <u>150</u> |
| <u>Deactivating a Recipient.....</u> | <u>152</u> |
| <u>Activating an Inactive Recipient.....</u> | <u>154</u> |
| <u>Managing Provider Agencies</u> | <u>155</u> |
| <u>Searching for a Provider Agency.....</u> | <u>156</u> |
| <u>Updating Provider Agency Details</u> | <u>158</u> |
| <u>Managing Payers.....</u> | <u>160</u> |
| <u>Searching for a Payer.....</u> | <u>161</u> |
| <u>Assigning Tasks to a Payer Service Code</u> | <u>163</u> |
| <u>Manually Adding a New Task for a Payer Service Code (Available if program allows it)</u> | <u>165</u> |
| <u>Deleting Manually Added Tasks for a Payer (Available if program allows it).</u> | <u>167</u> |
| <u>Linking a Payer to a Provider.....</u> | <u>169</u> |
| <u>Deleting Payers</u> | <u>170</u> |
| <u>Managing Contractors</u> | <u>171</u> |
| <u>Searching for a Contractor</u> | <u>172</u> |
| <u>Linking a Provider to a Contractor</u> | <u>174</u> |

| | |
|--|------------|
| <u>Deleting a Contractor</u> | <u>177</u> |
| <u>Managing Payer Override Rates.....</u> | <u>178</u> |
| <u>Searching for a Specific Payer Override Rate.....</u> | <u>179</u> |
| <u>Adding a Payer Override Rate</u> | <u>181</u> |
| <u>Updating a Payer Override Rate</u> | <u>183</u> |
| <u>Restoring a Payer Override Rate</u> | <u>185</u> |
| <u>Deleting a Payer Override Rate.....</u> | <u>187</u> |
| <u>Reporting.....</u> | <u>189</u> |
| <u>Generating a Report.....</u> | <u>190</u> |
| <u>Exporting a Report.....</u> | <u>194</u> |

Terminology

The following terms are used throughout the application and throughout this User Guide.

Administrator (Admin): An individual or individuals assigned and responsible for running an agency or organization also known as: Administrator, Billing Agent, Scheduler, Human Resources, Office Manager, Agency Owner, Service Broker/Case Manager, Fiscal Agent.

Caregiver: An individual providing services/care is also known as: Live-in Service Provider, Rendering Provider, Billing Provider, Home Health Aide, Adult Daycare Provider, Provider, Community Mental Health Provider, Agency Providers, PDS Employee, Independent Provider, Service Provider, Participant Directed Service Provider, Personal Care Provider, Group Home Provider, Direct Care Worker, Direct Service Provider, Non-Agency Provider.

Modifier: (Supplement to the *Service Codes*) Two digits used for billing to provide extra details (when applicable) concerning a service/care provided by a Caregiver. Not all service codes have modifiers.

Agency: A business established to provide a service and employs individuals to render care also known as: Traditional Home Health Agency, Fiscal Management Agency (FMA), Provider Agency, Billing Provider.

Payer: Payer refers to the health plan or organization that provides payment to the Caregiver or Agency for the services that are provided to its Recipients by its Caregivers.

Prior Authorization/Service Authorization: Health plans authorize care for a Recipient for a specified period, for a specified unit (time increment for a service code) or for a specified number of visits.

Recipient: An individual receiving services/care is also known as: Client, Participant, Individual, Family Member (child, parent, spouse, etc.) PDS Employer, Beneficiary

Schedule: A schedule includes one or multiple visits that are most often planned by Administrators for Caregivers to provide services to Recipients.

Service/Service Code: Service Codes are used to define the type of service being rendered and the amount of time allotted for that service (unit). Service codes can also be known as: Description, Billing Codes, Procedure Codes, Revenue Codes, HCPCS or Healthcare Common Procedure Coding System. Service codes may include



a series of tasks. For example, tasks may include Cleaning or Grooming. Some, but not all service codes, may have modifiers (see Modifier)

Visit: A scheduled date, time, and place for a Caregiver to provide services to a Recipient and the services to be provided.

Getting Started

You are here: [Tellus EVV Administrator User Guide](#) > Getting Started

Click a topic below:

[General Requirements](#)

[Logging In](#)

[Administrator Console Overview: Viewing the Dashboard](#)

[Viewing the Main Menu](#)

[Changing Refresh Settings](#)

[Commonly Used Icons and Controls](#)

[Selecting Times using the Clock Icon](#)

[Selecting Dates using the Calendar Icon](#)

[Logging Out](#)

[Terminology](#)

[Acronyms](#)

General Requirements

You are here: [Tellus EVV Administrator User Guide](#) > [Getting Started](#) > General Requirements

Each provider must designate at least one Tellus EVV system administrator during the registration process. System administrators will:

- Create and manage accounts and IDs for Users.
- Create and manage Recipient information.
- Schedule, manage and monitor visits, and manually update visits when needed.
- Run reports.

All administrators *must* have a **Username** and **Password** to [login](#) to the Tellus EVV application.

The Administrator Console and the Mobile App are compatible with the following:

| | |
|------------------------------------|---|
| Supported PC Operating Systems | <ul style="list-style-type: none"> • Windows OS (32 or 64 bit) Version 7 or higher • Mac OS Version X (10) or higher |
| Supported Mobile Operating Systems | <ul style="list-style-type: none"> • iOS Version 8 or higher • Android Version Lollipop (5.0) or higher |
| Supported PC & Mac Browsers | <ul style="list-style-type: none"> • 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: | <ul style="list-style-type: none"> • Google Chrome Version 4 or higher on Android • Apple Safari Version 10 (Mac)/4 (Windows) or higher |

| | |
|----------------------------|---|
| Mobile Device Requirements | <ul style="list-style-type: none">• 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 |
|----------------------------|---|

Related Topics

- [Logging In](#)
- [Administrator Console Overview](#)
- [Viewing the Main Menu](#)
- [Changing Refresh Settings](#)
- [Commonly Used Icons and Controls](#)
- [Logging Out](#)
- [Terminology](#)
- [Acronyms](#)

Logging In

You are here: [Tellus EVV Administrator User Guide](#) > [Getting Started](#) > Logging In

Note: Be sure pop-up blockers are turned off before logging in.

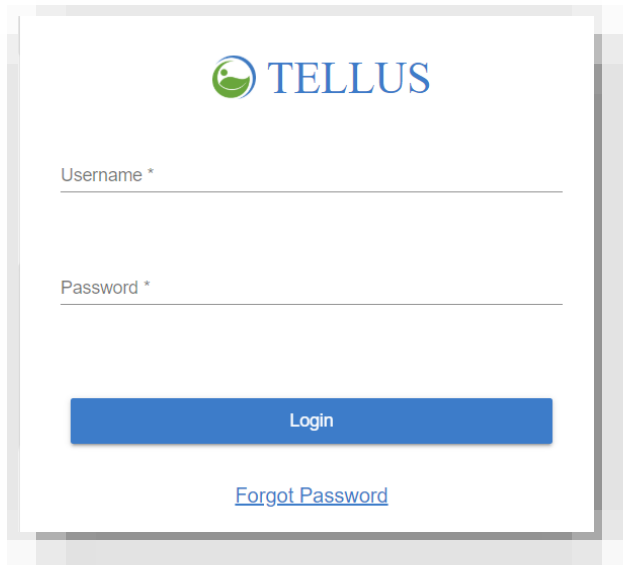
You can access the Tellus EVV Administrator Console using any web browser.

1. Type <https://4tellus.com> in the address bar of your browser.



2. Click **LOGIN TELLUS EVV** in the upper right-hand corner and select **MY DASHBOARD**.

The Tellus EVV Login dialog box opens.

A screenshot of the Tellus EVV Login dialog box. It features the Tellus logo at the top left. Below the logo are two input fields: "Username *" and "Password *". A blue "Login" button is positioned below the password field. At the bottom of the dialog box, there is a blue underlined link that says "Forgot Password".

3. Enter *your* **Username** and **Password**.

*Note: If you forgot your password, click **Forgot Password**. You will receive an email with a temporary link that will allow you to log in and change your password.*

4. Click **Login**.

The Tellus EVV Console opens to the Dashboard view.

*Note: If you are new to Tellus and have been assigned the User Role **Admin, Billing,** or **Monitor**, you will receive an email inviting you to join Tellus EVV. You have 36 hours to activate your account; after that time the invitation expires.*

*If you are new to Tellus and have been assigned the role of **Caregiver**, you will receive an email providing instructions on how to access the Tellus EVV mobile app. You will have 36 hours to activate the app; after that time, the invitation expires.*

In either case, if you do not find the email in your inbox, check your junk and spam folders for the email from the Tellus EVV System.

Related Topics

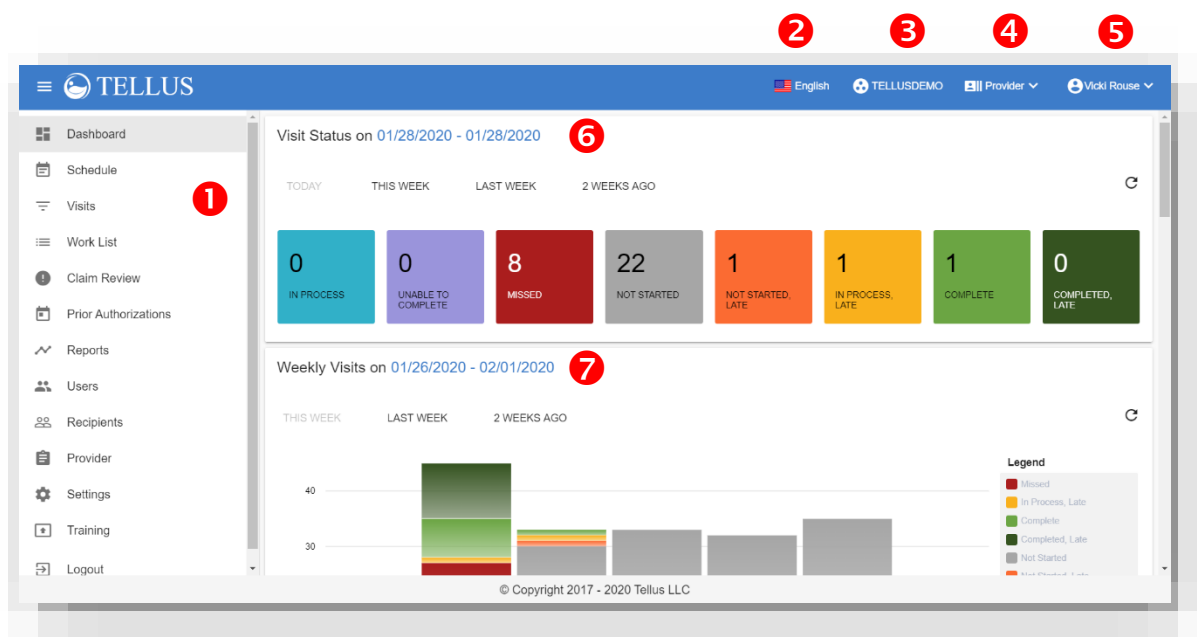
- [General Requirements](#)
- [Administrator Console Overview](#)
- [Viewing the Main Menu](#)
- [Changing Refresh Settings](#)
- [Commonly Used Icons and Controls](#)
- [Logging Out](#)
- [Terminology](#)
- [Acronyms](#)

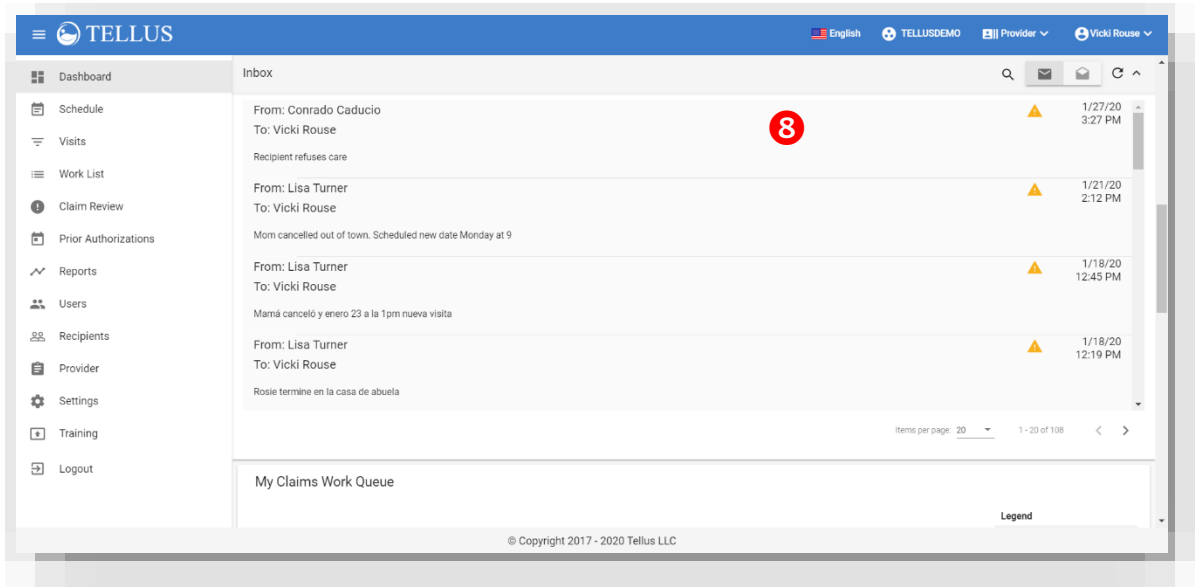
Administrator Console Overview: Viewing the Dashboard

You are here: [Tellus EVV Administrator User Guide](#) > [Getting Started](#) > Administrator Console Overview

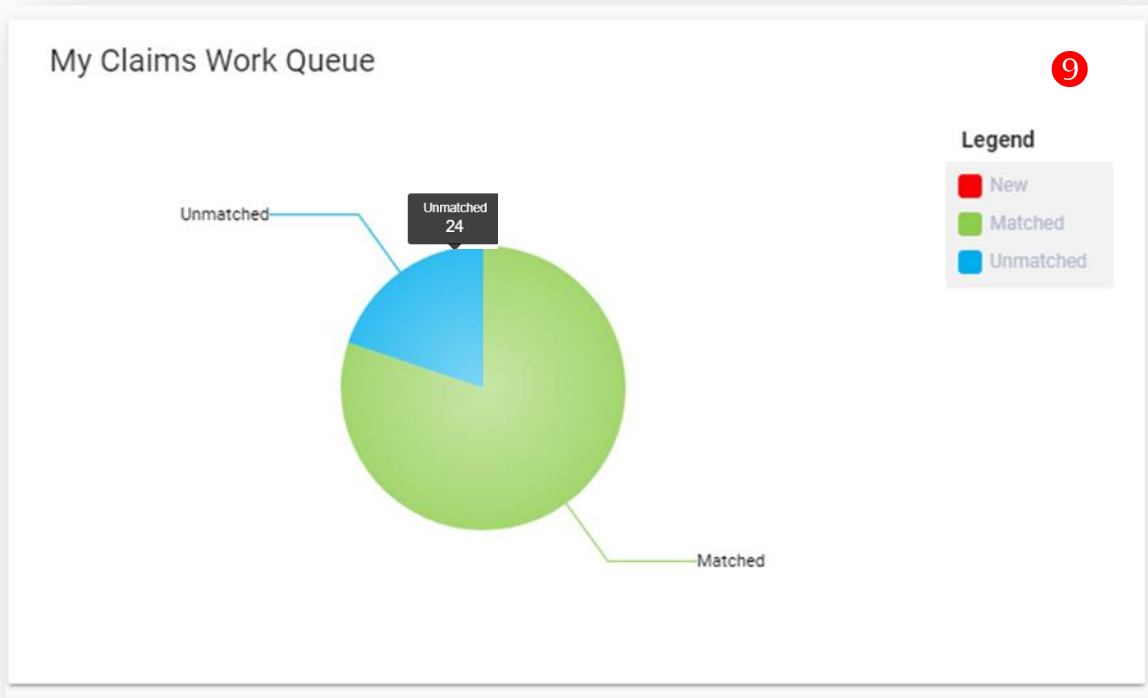
The Tellus EVV Administrator Console displays a snapshot view of real-time data. The default Administrator Console view is the Dashboard, where you will find the numbered items, which are described in the table that follows the screen shots. Screen shots are shown in the order you will see them when you scroll down the dashboard.

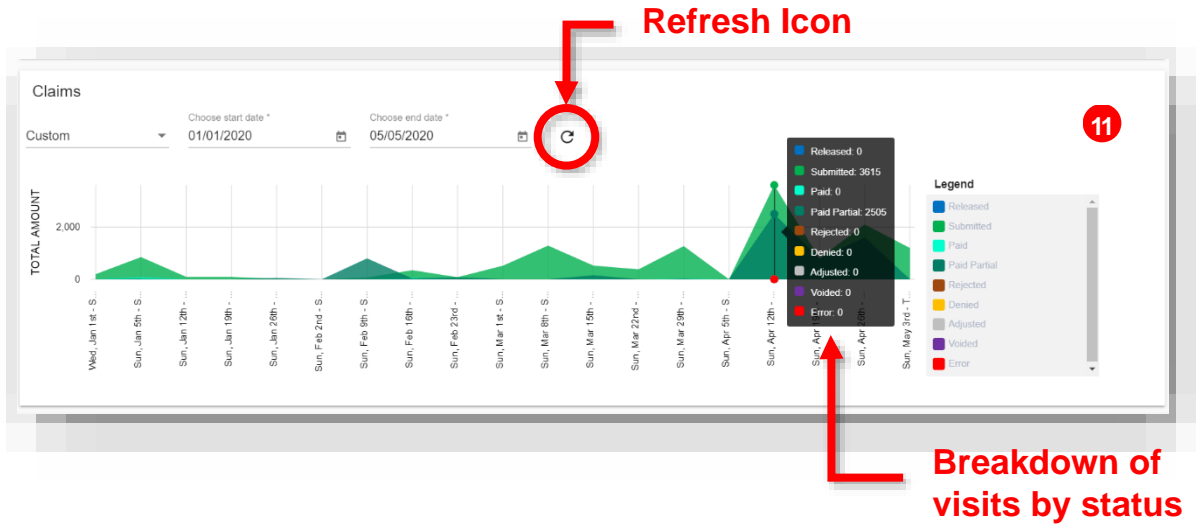
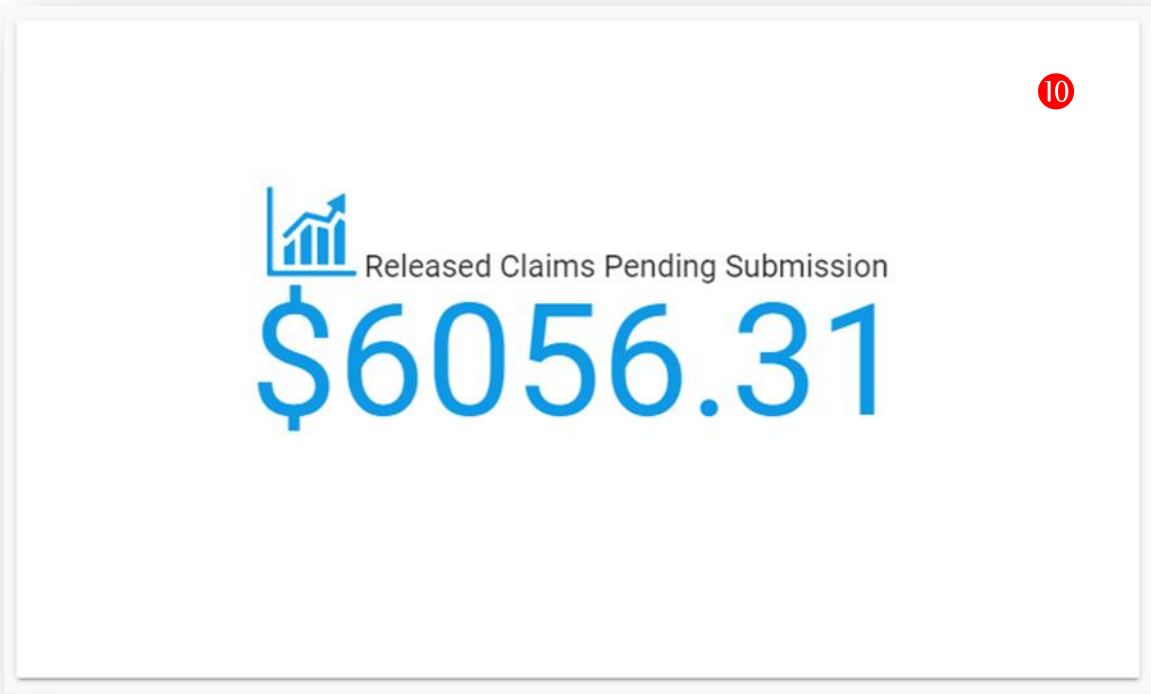
More detailed information on how to use each section of the Dashboard is in [Using the Dashboard](#).





The screenshot shows the TELLUS web application interface. The top navigation bar includes the TELLUS logo, language settings (English), a user profile (TELLUSDEMO), and a provider dropdown (Provider). The main content area is divided into a sidebar menu on the left and an inbox on the right. The sidebar menu includes options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The inbox displays three email entries, each with a red notification badge containing the number '8'. The entries are from Conrado Caducio, Lisa Turner, and Lisa Turner, all addressed to Vicki Rouse. The bottom of the page shows a 'My Claims Work Queue' section with a 'Legend' label.





| | |
|----|---|
| 1 | Main Menu: Provides access to other areas in the Console and allows you to customize viewable data. See Viewing the Main Menu for more information on the menu options. |
| 2 | Language icon: Allows you to select your language preference: English or Spanish . |
| 3 | Agency name: Shows the name of your home health agency. |
| 4 | Provider: This shows detail about your agency. |
| 5 | Username: Displays your Username. Click the arrow by your Username to access the My Profile , option where you can update your information, and the Log Out function. |
| 6 | Visit Status: Choose the time period for the visits you want to view: Today , This Week , Last Week or 2 Weeks Ago . Colored boxes display the number of visits for each visit status for the time period you select. |
| 7 | Weekly Visits: Shows information from the Status Tiles in a bar chart format. You can view This Week , Last Week or 2 Weeks Ago . |
| 8 | Inbox: Depending on your screen size, the Inbox displays to the right of the statuses, or you may need to scroll down to see it. The Inbox displays messages sent from Caregivers in the field and, when you open a note, it provides a link to visit details. You cannot respond to messages from the Inbox, but you can send messages to Caregivers on the Users page. |
| 9 | My Claims Work Queue: Shows a pie chart of new, matched, and unmatched visits in Work List and provides direct access to the Work List. |
| 10 | Released Claims Pending Submission: Shows the total dollars you can expect to receive for matched visits that have been released for payment and provides direct access to Claim Review. |
| 11 | Claims: Shows a graph of visits by status according to a timeline you choose. |

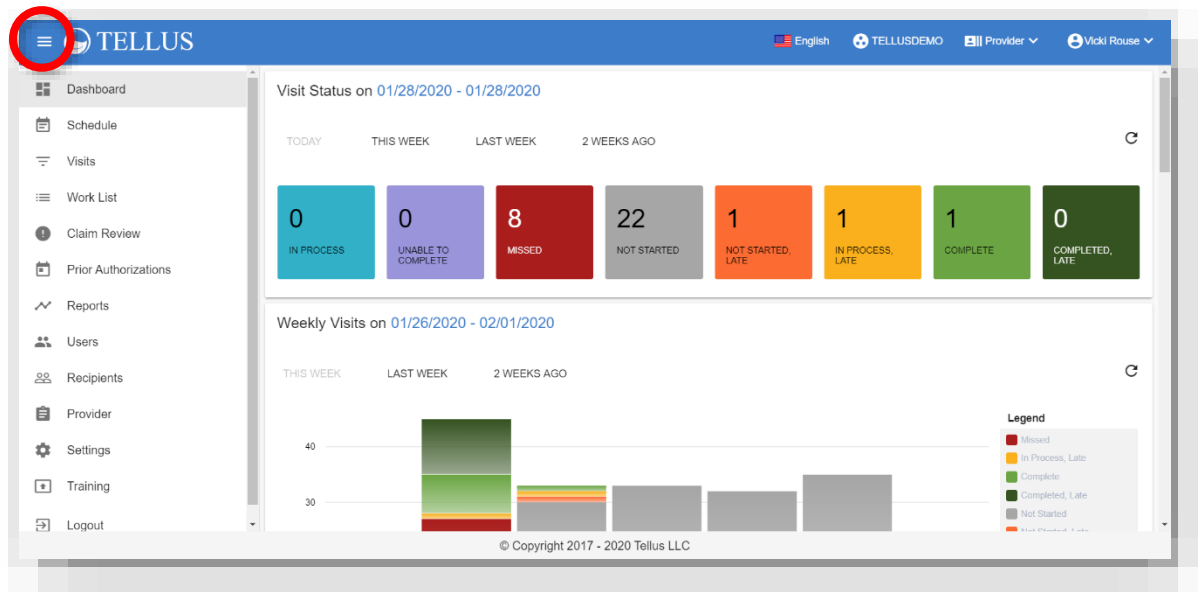
Related Topics

- [General Requirements](#)
- [Logging In](#)
- [Viewing the Main Menu](#)
- [Changing Refresh Settings](#)
- [Commonly Used Icons and Controls](#)
- [Logging Out](#)
- [Terminology](#)
- [Acronyms](#)

Viewing the Main Menu

You are here: [Tellus EVV Administrator User Guide](#) > [Getting Started](#) > Viewing the Main Menu

The Main Menu appears on the top left side of the Tellus EVV Administrator Console. Click the Main Menu icon circled below – sometimes called the “hamburger icon” – to expand the menu and see a description of all options. Click it again to collapse the Main Menu so that just the icons are visible.



The **Main Menu** provides access to many different features, which are listed in the table on the next page.

Note: Claim Review, Work List and Prior Authorizations are used for claim processing and are discussed in the Tellus EVV Claims User Guide, which is available from the Training menu option.

| Menu Item | Description |
|-----------------------------------|--|
| <u>Dashboard</u> | Accesses the Console Home page that provides an at-a-glance look at visits and their status, and your inbox. |
| <u>Schedule</u> | Allows you to create, view and manage Schedules by Caregiver or by Recipient. |
| <u>Visits</u> | Allows you to create visits, and view and manage all scheduled Visits and Visit details. |
| Work List | Allows you to search and review Completed Visits by Payer to release for claims processing. |
| Claim Review | Allows you to view Payer responses to claims and resubmit paid/partially paid claims. |
| Prior Authorizations | Allows you to search and review Prior Authorizations. If allowed per program, user can also add, update, and delete Prior Authorizations. |
| <u>Reports</u> | Allows you to view and print pre-defined or ad-hoc reports. |
| <u>Users</u> | Allows you to view and manage Users, User information like IDs and personal information and User roles. |
| <u>Recipients</u> | Allows you to view and manage Recipients and Recipient information, including demographics, address, referring physician, payers, and diagnoses codes. |
| <u>Providers</u> | Allows you to update provider information, link and unlink payers and contractors, and manage payer override rates for specific services when needed. |
| <u>Settings</u> | Allows you to adjust refresh times (minimum 300 seconds, maximum 600 seconds) for the Dashboard, Users, and Schedule. |
| Training | Provides access to the Training and Support Center for access to User Guides, FAQs, video tutorials, and other training materials. |
| <u>Logout</u> | Logs you out of the Administrator Console. |

Related Topics

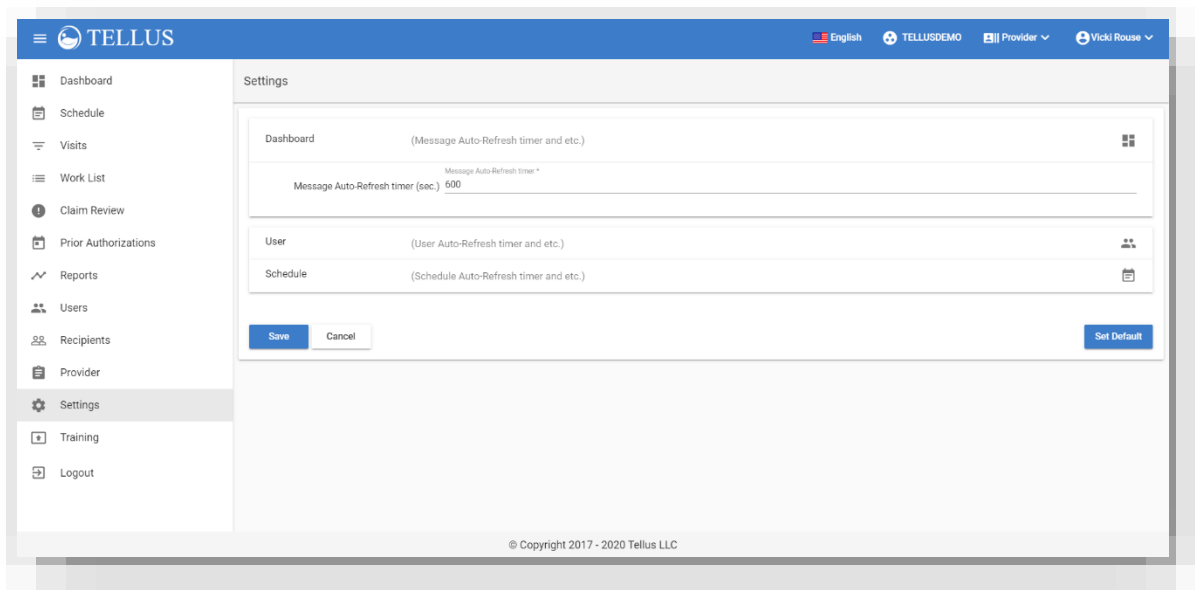
- [General Requirements](#)
- [Logging In](#)
- [Administrator Console Overview](#)
- [Changing Refresh Settings](#)
- [Commonly Used Icons and Controls](#)
- [Logging Out](#)
- [Terminology](#)
- [Acronyms](#)

Changing Refresh Settings

You are here: [Tellus EVV Administrator User Guide](#) > [Getting Started](#) > Changing Refresh Settings

The **Settings** option allows you to adjust refresh times (minimum 300 seconds, maximum 600 seconds) for the Dashboard, Users, and Schedule. To do so:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click **Settings**.



3. Click the name of the setting you want to change. Chose **Dashboard**, **User**, or **Schedule**.

You can also click **Set Default** to change all to 600 seconds.

4. Type the interval time, in seconds, that you want to refresh.

Enter a minimum of 300 seconds to a maximum of 600 seconds.

5. Click **Save**.







Related Topics

- [General Requirements](#)
- [Logging In](#)
- [Administrator Console Overview](#)
- [Viewing the Main Menu](#)
- [Commonly Used Icons and Controls](#)
- [Logging Out](#)
- [Terminology](#)
- [Acronyms](#)



Commonly Used Icons and Controls

You are here: [Tellus EVV Administrator User Guide](#) > [Getting Started](#) > Commonly Used Icons and Controls







You will see some common icons on the Tellus EVV Administrator Console and throughout the application.

| Icon | Description |
|---|--|
|  | Main Menu: Click the Main Menu icon –sometimes called the “hamburger icon” – to expand the menu to see the full list of options; click it again to collapse the menu so that only icons display. |
|  | View: Click the View icon to view a record. |
|  | Edit: Click the Pencil icon to edit a field or row. |
|  | Actions: Click the Actions icon to open a record (like a Visit), or to see a submenu of actions available for a record (like Users and Recipients). |
|  | Search: Click the Search icon to open a search field. There you can enter a few characters that will help you find a User or Recipients. Press Enter after making your entry in the Search field. |
|  | Reload: Click the Reload icon to Refresh the page with the most recent data on any page where it appears. Refresh times for the Dashboard, Users, and Schedule can be set using the Settings option. |

Icons you will see when scheduling visits include the following.

| Icon | Description |
|---|--|
|  | Clock: Click the Clock icon when scheduling visits to select a time in a field where a time entry is required like Choose start time . You will select a time in the Choose end time field only when you are manually completing a visit. See Selecting Times using the Clock Icon for detailed instructions on setting time using this icon. |
|  | Calendar: Click the Calendar icon to set a date in a field where a date entry is required like Choose start date or Choose end date . See Selecting Dates using the Calendar Icon for detailed instructions on setting time using this icon. |

Icons you will see when viewing a schedule include the following.

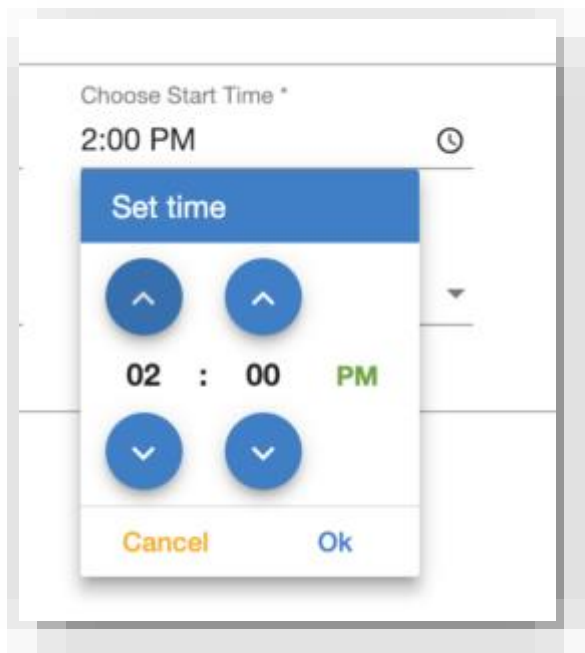
| Icon | Description |
|---|---|
|  | <p>Calendar View: Click the Calendar View icon to see all scheduled visits within a calendar period for a searched User or Recipient. If you are looking at a weekly view, Users will display across the top of the page; if you are looking at a specific day, days display across the top of the page. In both views, times are listed down the left side.</p> |
|  | <p>Schedule View: Click the Schedule View icon to see all scheduled visits within a calendar period for a searched User or Recipient. The schedule view shows days and times across the top of the page, Users or Recipients down the left side and a total number of visits.</p> |
|  | <p>Today: Click the Today icon to see the schedule for the current day. Use the arrows at the top of the screen to move forward and backward between days.</p> |
|  | <p>Day: Click the Day icon to see the schedule for a specific day that you select. Use the arrows at the top of the screen to move forward and backward between days.</p> |
|  | <p>Week: Click the Week icon to see the schedule for a specific week in either Calendar or Schedule View. Use the arrows at the top of the screen to move forward and backward between weeks.</p> |
|  | <p>Month: Click the Month icon to see the schedule for a specific month in either Calendar or Schedule View. Use the arrows at the top of the screen to move forward and backward between months.</p> |

Selecting Times using the Clock Icon

You are here: [Tellus EVV Administrator User Guide](#) > [Getting Started](#) > Setting Time using the Clock Icon

Fields that require a time entry have a clock icon to the right of them.

1. Click the icon to open the Set time dialog box; it defaults to the next five-minute interval. For example, if the clock was accessed at 1:58 PM, the clock will display 2:00 PM.



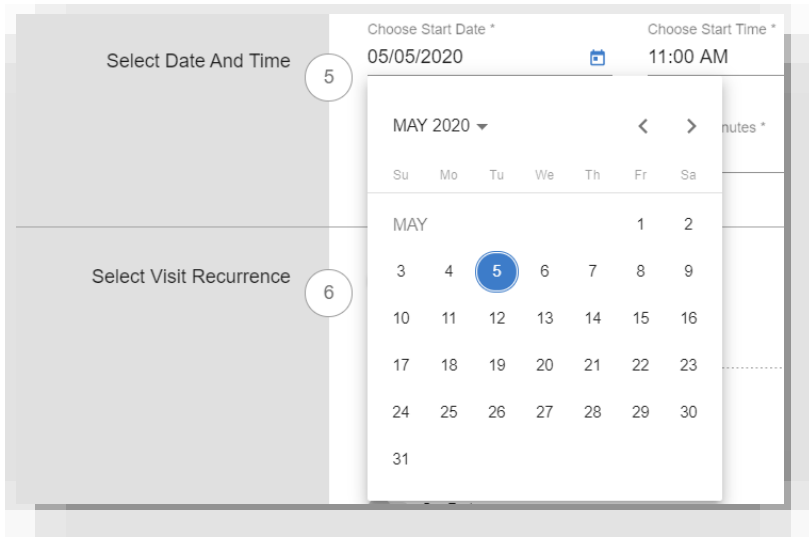
2. Use the up and down arrows for hours and minutes (5-minute intervals) to select hours and minutes.
3. Click **AM** or **PM** to toggle between them until the correct time of day displays.
4. Click **OK** to complete your time selection.

Selecting Dates using the Calendar Icon

You are here: [Tellus EVV Administrator User Guide](#) > [Getting Started](#) > Setting Dates using the Calendar Icon

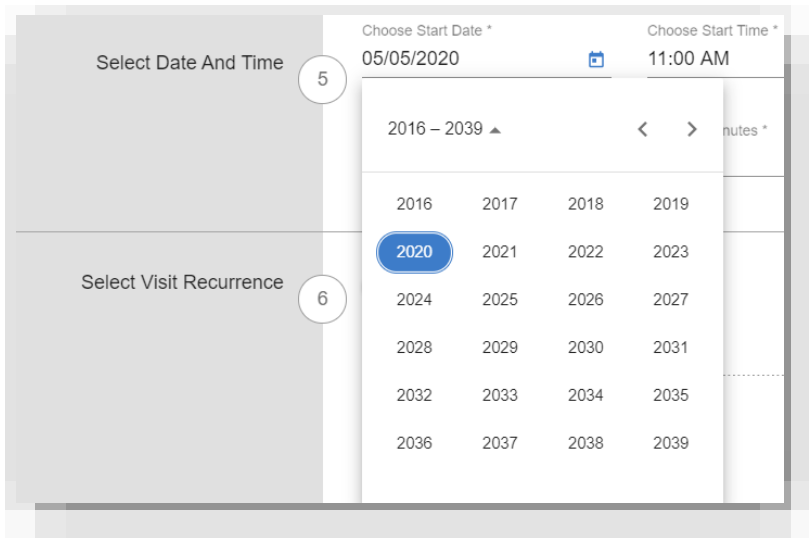
Fields that require a date entry have a calendar icon to the right of them.

1. Click the icon to open the Calendar; it defaults to the current month, day, and year.

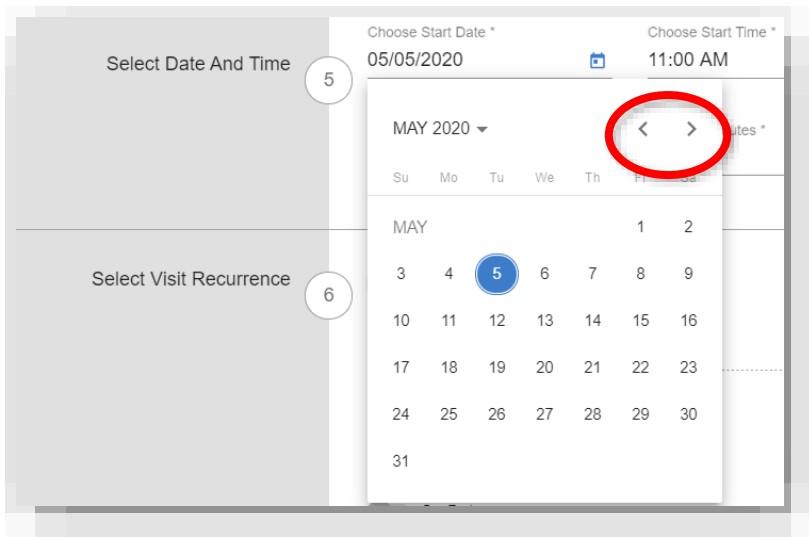


2. To change the year, click the month and year displayed to open the window shown below; if you do not see the year you want, use the right and left arrows to scroll through years.

3. Click the year you want.



4. To change the month and day, click the right and left arrows, then click the date you need.



5. Click **OK** to select the date.

Related Topics

- [General Requirements](#)
- [Logging In](#)
- [Administrator Console Overview](#)
- [Viewing the Main Menu](#)
- [Changing Refresh Settings](#)
- [Logging Out](#)
- [Terminology](#)
- [Acronyms](#)

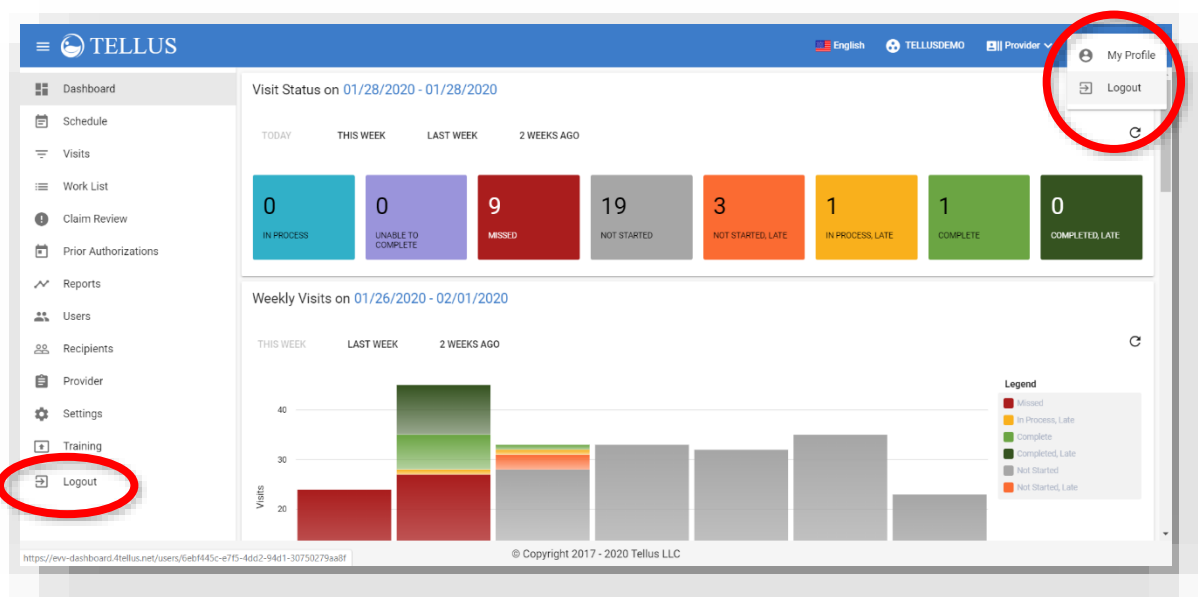
Logging Out

You are here: [Tellus EVV Administrator User Guide](#) > [Getting Started](#) > Logging Out

Any time you are not actively using the system, it is a best practice to log out. Logging out helps ensure the security and protection of your organization’s information as well as the information for your Recipients and Caregivers. If you do not logout, you will automatically be logged out after 30 minutes of inactivity.

There are two ways to logout. Either way you will be logged out of the system and returned to the system login page.

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information). Then, click **Logout**.
2. In the banner, click the drop-down list next to your **Username**. Then, click **Logout**.



The screenshot displays the Tellus EVV Administrator User Guide interface. The main menu on the left includes options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The Logout button is circled in red. The top right corner shows the user profile dropdown menu, also circled in red, with options for My Profile and Logout. The main content area shows a dashboard with visit status metrics and a weekly visits bar chart.

| Category | Count |
|--------------------|-------|
| IN PROCESS | 0 |
| UNABLE TO COMPLETE | 0 |
| MISSED | 9 |
| NOT STARTED | 19 |
| NOT STARTED, LATE | 3 |
| IN PROCESS, LATE | 1 |
| COMPLETE | 1 |
| COMPLETED, LATE | 0 |

Related Topics

- [General Requirements](#)
- [Logging In](#)
- [Administrator Console Overview](#)
- [Viewing the Main Menu](#)
- [Changing Refresh Settings](#)
- [Commonly Used Icons and Controls](#)
- [Acronyms](#)

Related Topics

- [General Requirements](#)
- [Logging In](#)
- [Administrator Console Overview](#)
- [Viewing the Main Menu](#)
- [Changing Refresh Settings](#)
- [Commonly Used Icons and Controls](#)
- [Logging Out](#)
- [Acronyms](#)

Acronyms

You are here: [Tellus EVV Administrator User Guide](#) > [Getting Started](#) > Acronyms

| Acronym | Definition |
|---------|---|
| EVV | Electronic Visit Verification |
| HIPAA | Health Insurance Portability and Accountability Act |
| HCPCS | Healthcare Common Procedure Coding System |
| LTC | Long-Term Care |
| PA | Prior Authorization / Approval |
| SA | Service Authorization/ Approval |

Related Topics

- [General Requirements](#)
- [Logging In](#)
- [Administrator Console Overview](#)
- [Viewing the Main Menu](#)
- [Changing Refresh Settings](#)
- [Commonly Used Icons and Controls](#)
- [Logging Out](#)
- [Terminology](#)

Using the Dashboard

You are here: [Tellus EVV Administrator User Guide](#) > Using the Dashboard

Click a topic below:

[Accessing Visit Status Detail](#)

[Accessing Weekly Visits Detail](#)

[Viewing Inbox Alerts](#)

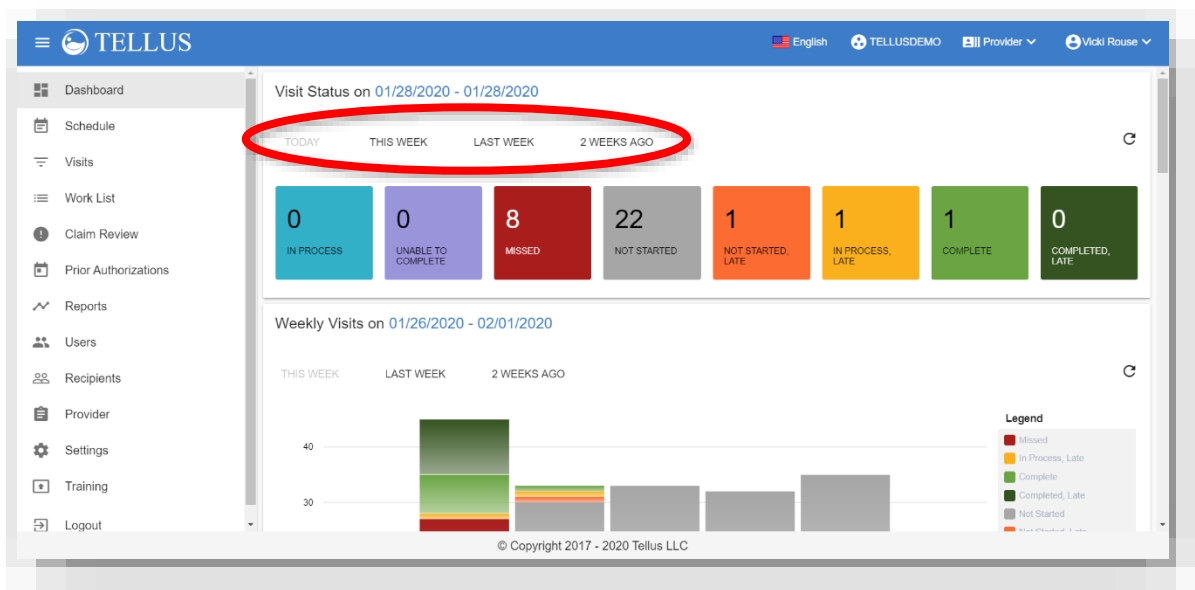
[Viewing Claims Information](#)

Accessing Visit Status Detail

You are here: [Tellus EVV Administrator User Guide](#) > [Monitoring Caregivers and Visits](#) > Administrator Dashboard: Accessing Visit Status Detail

You can view details about visits for a particular status during the time period selected, using the Tellus EVV Dashboard. Simply click a status tile. The example below shows visit statuses for **Today**.

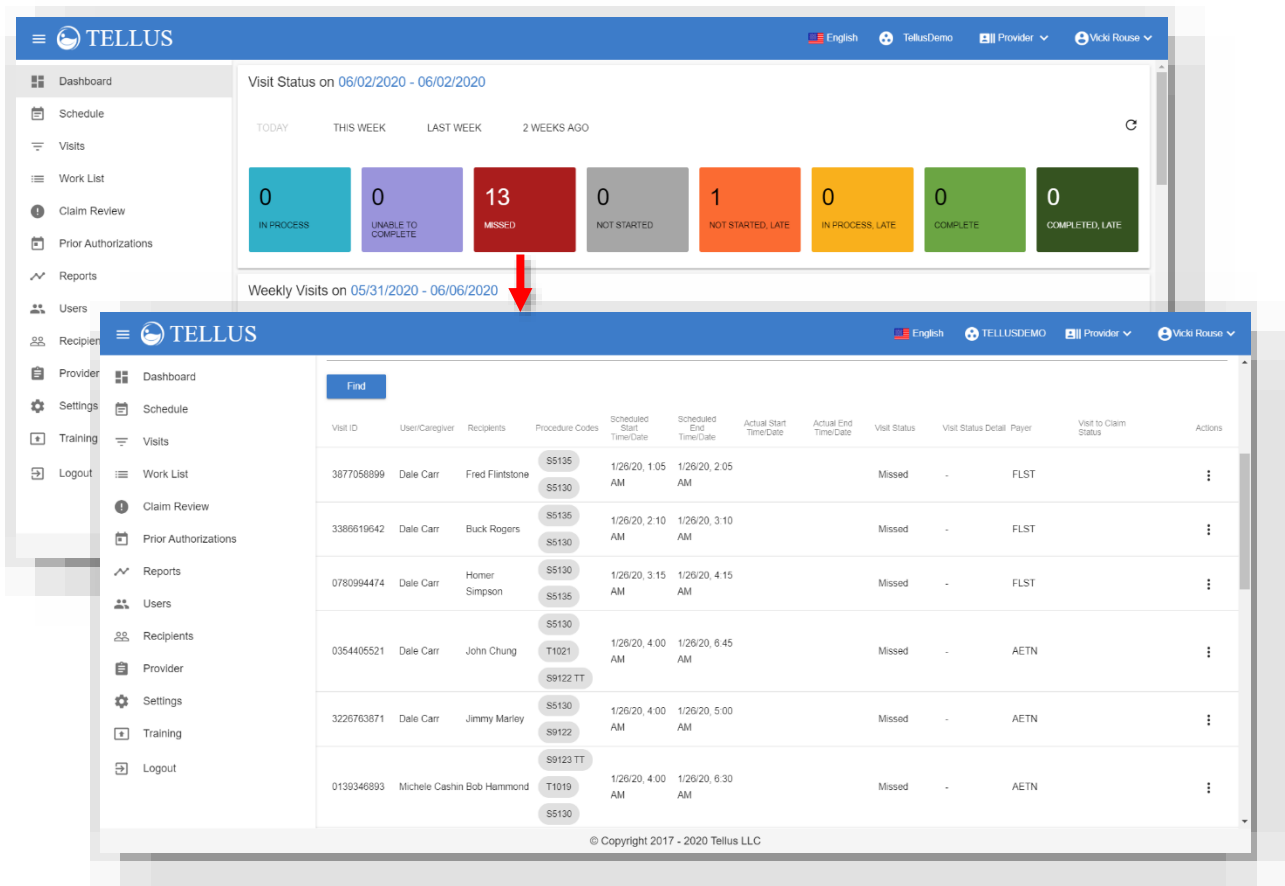
You can also choose a different time period: **This week**, **Last week**, or **2 weeks ago**.



The “reload” icon shown below allows you to update data for a real-time schedule view:



To see visits for a specific status, click a tile. The example below shows details for all of the **Missed** visits for **Last week**. You will need to scroll down to see all visits.



The screenshot shows the TELLUS dashboard interface. At the top, there's a navigation bar with the TELLUS logo, language settings (English), user information (TellusDemo), and provider/recipient dropdowns (Provider, Vicki Rouse). A sidebar on the left contains various menu items like Dashboard, Schedule, Visits, Work List, Claim Review, etc.

The main content area displays 'Visit Status on 06/02/2020 - 06/02/2020'. Below this, there are tabs for 'TODAY', 'THIS WEEK', 'LAST WEEK', and '2 WEEKS AGO'. A row of colored tiles shows visit counts for different statuses: IN PROCESS (0), UNABLE TO COMPLETE (0), MISSED (13), NOT STARTED (0), NOT STARTED, LATE (1), IN PROCESS, LATE (0), COMPLETE (0), and COMPLETED, LATE (0). A red arrow points to the 'MISSED' tile.

Below the tiles, there's a section for 'Weekly Visits on 05/31/2020 - 06/06/2020'. This section is overlaid with a detailed view of missed visits. The detailed view includes a search bar and a table with the following columns: Visit ID, User/Caregiver, Recipients, Procedure Codes, Scheduled Start Time/Date, Scheduled End Time/Date, Actual Start Time/Date, Actual End Time/Date, Visit Status, Visit Status Detail, Payer, and Visit to Claim Status. The table lists several missed visits with their respective details.

| Visit ID | User/Caregiver | Recipients | Procedure Codes | Scheduled Start Time/Date | Scheduled End Time/Date | Actual Start Time/Date | Actual End Time/Date | Visit Status | Visit Status Detail | Payer | Visit to Claim Status | Actions |
|------------|----------------------------|-----------------|-----------------|---------------------------|-------------------------|------------------------|----------------------|--------------|---------------------|-------|-----------------------|---------|
| 3877056899 | Dale Carr | Fred Flintstone | S5135 | 1/28/20, 1:05 AM | 1/28/20, 2:05 AM | | | Missed | - | FLST | | ⋮ |
| | | | S5130 | | | | | | | | | |
| 3386619642 | Dale Carr | Buck Rogers | S5135 | 1/28/20, 2:10 AM | 1/28/20, 3:10 AM | | | Missed | - | FLST | | ⋮ |
| | | | S5130 | | | | | | | | | |
| 0780994474 | Dale Carr | Homer Simpson | S5130 | 1/28/20, 3:15 AM | 1/28/20, 4:15 AM | | | Missed | - | FLST | | ⋮ |
| | | | S5135 | | | | | | | | | |
| 0354405521 | Dale Carr | John Chung | S5130 | 1/28/20, 4:00 AM | 1/28/20, 6:45 AM | | | Missed | - | AETN | | ⋮ |
| | | | T1021 | | | | | | | | | |
| | | | S9122 TT | | | | | | | | | |
| 3226763871 | Dale Carr | Jimmy Marley | S5130 | 1/28/20, 4:00 AM | 1/28/20, 5:00 AM | | | Missed | - | AETN | | ⋮ |
| | | | S9122 | | | | | | | | | |
| | | | S9123 TT | | | | | | | | | |
| 0139346893 | Michele Cashin Bob Hammond | | T1019 | 1/28/20, 4:00 AM | 1/28/20, 6:30 AM | | | Missed | - | AETN | | ⋮ |
| | | | S5130 | | | | | | | | | |

© Copyright 2017 - 2020 Tellus LLC

Note: See [Viewing Visit Details](#) for more information on the **Visits** detail page.

Related topics:

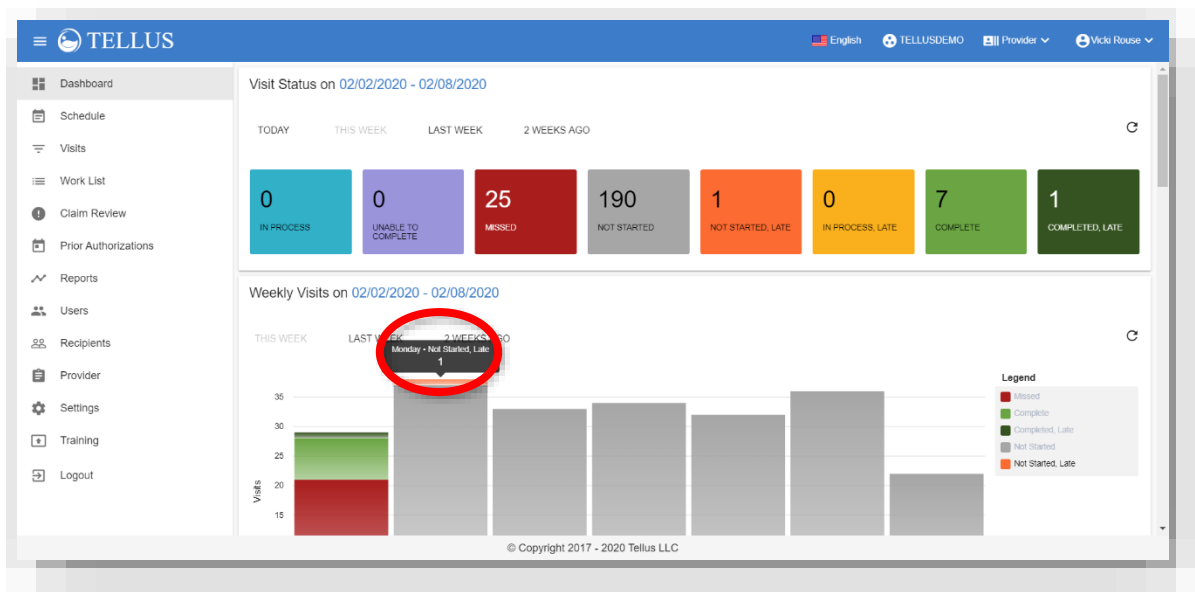
- [Accessing Weekly Visits Detail](#)
- [Viewing Claims Information](#)
- [Viewing Inbox Alerts](#)

Accessing Weekly Visits Detail

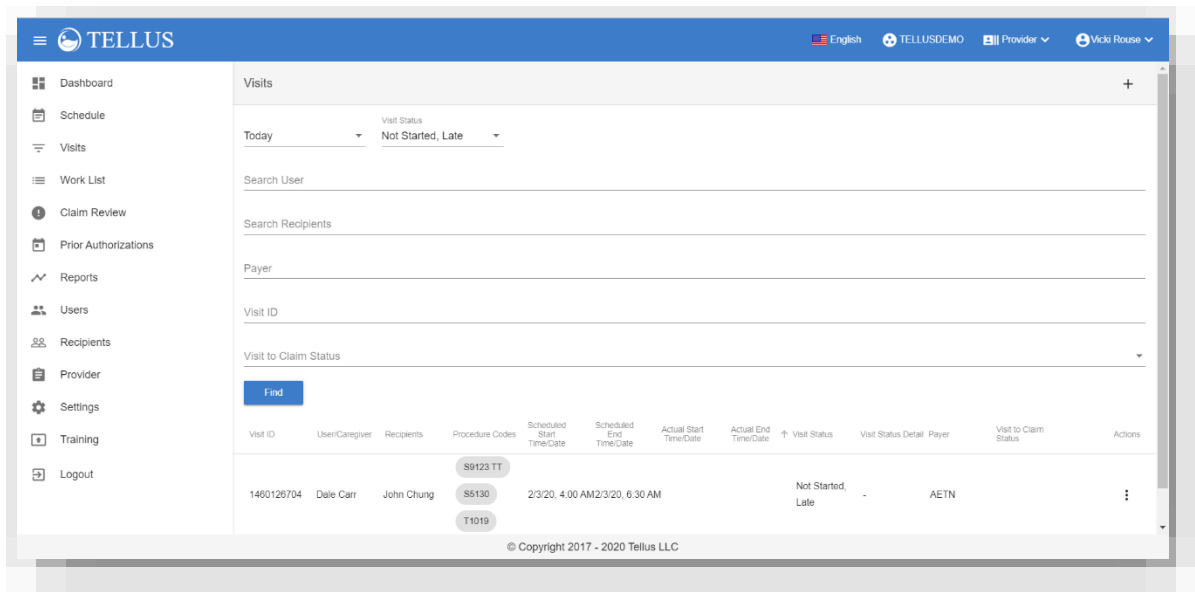
You are here: [Tellus EVV Administrator User Guide](#) > [Monitoring Caregivers and Visits](#) > Administrator Dashboard: Accessing Weekly Visit Detail

To view additional details about visits during a specific time period, click any of the color-coded areas on the **Weekly Visits** graph.

The example below shows what you see when you hover your cursor over the status **Not Started, Late** for Monday of This Week.



Click **Monday – Not Started, Late** to see visit details.



You can choose a different time period -- **This week, Last week, or 2 weeks ago** – and click a different status to see the details for other visits.

*Note: See [Viewing Visit Details](#) for more information on the **Visits** detail screen.*

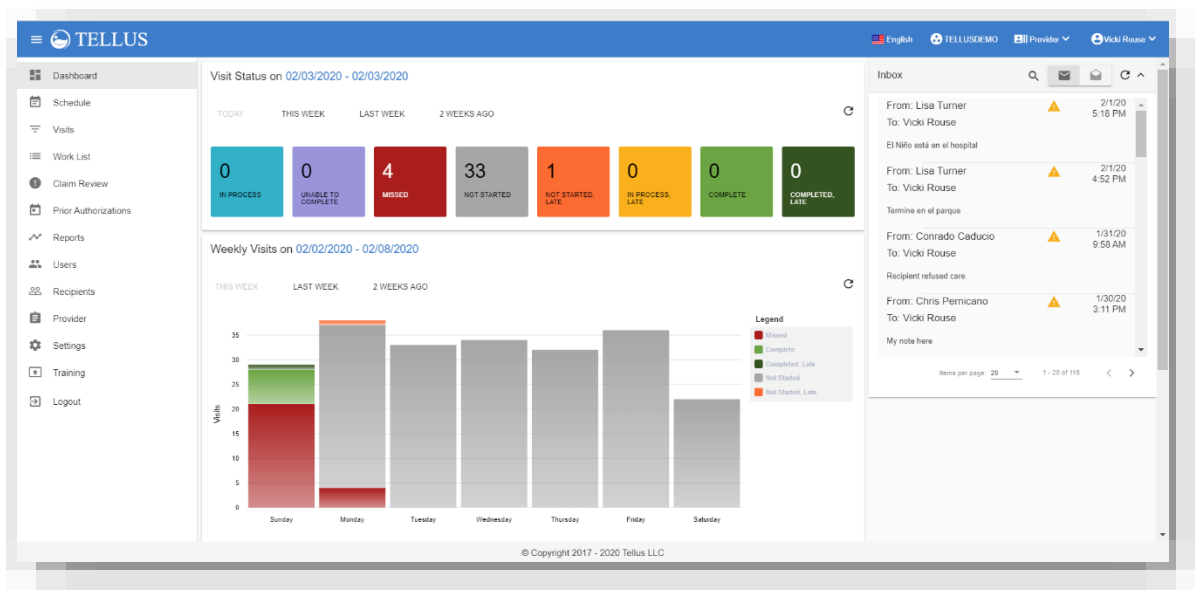
Related topics:

- [Accessing Visit Status Detail](#)
- [Viewing Claims Information](#)
- [Viewing Inbox Alerts](#)

Viewing Inbox Alerts

You are here: [Tellus EVV Administrator User Guide](#) > [Monitoring Caregivers and Visits](#) > Administrator Dashboard: Viewing Inbox Alerts

When a Caregiver enters a note and marks it as **Alert My Administrator** on their Tellus EVV mobile app while conducting a visit, the note will appear in your **Inbox** on the Administrator Dashboard, located either below the **Weekly Visit Status** panel or on the right side of the page, depending on your browser's window size. Click a note to read the full text.

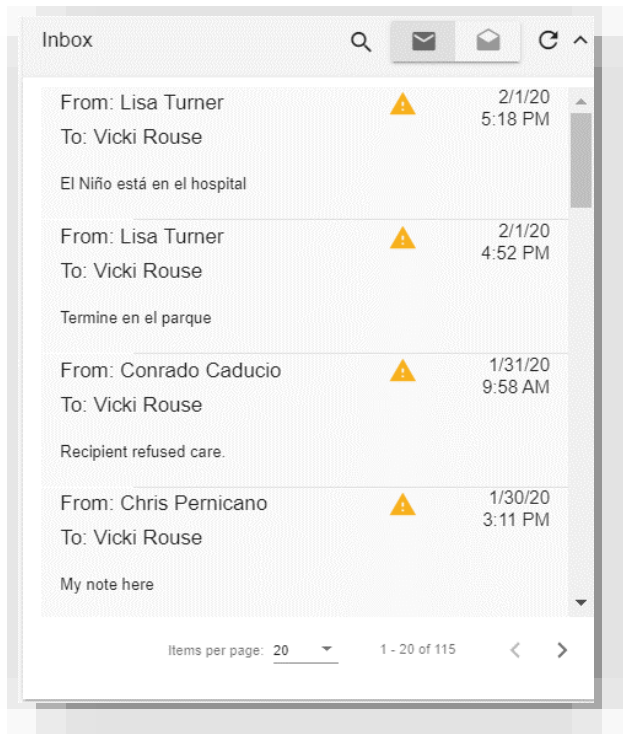


The **Dashboard**, including the **Inbox**, refreshes automatically every 600 seconds by default to ensure notifications are received in a timely manner. You can change how frequently the **Inbox** refreshes by going to the [Settings](#) page and updating the setting for Message Auto-Refresh Timer. You can manually update your **Inbox** at any time by simply clicking the refresh icon.

Using the **Inbox**, you can:

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

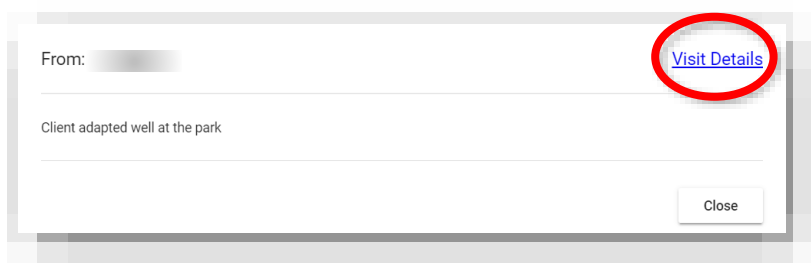
- Change the number of messages per page, by clicking the **Items per page** drop-down box. You can page through messages by clicking the forward arrow, or caret, or the back arrow, or caret.



Note: Notes with a yellow triangle shown, like the one shown below, indicate the note was marked as “Alert My Administrator” when the Caregiver sent it from their mobile app or was marked as “Alert” Note Type when it was entered in the Administrator Console.



Click a message to view it and a popup like the one shown below displays.



Read the message and then click **Close**, or click **Visit Details** to see a screen like the one shown below.

Visit ×

| | | | |
|------------------|-------------|--|--|
| Status: | Completed | | |
| Caregiver: | Lisa Turner | | |
| Recipient(s): | Nick Otine | | |
| Service Code(s): | UNKWN | | |

| | | | |
|----------------------------------|--|--------------------------------|--|
| Scheduled Start Time: | Sep 19, 2019, 6:00:00 PM | Scheduled End Time: | Sep 19, 2019, 7:00:00 PM |
| Actual Start Time: | Sep 19, 2019, 6:39:39 PM | Actual End Time: | Sep 19, 2019, 6:52:29 PM |
| Start Verification Type: | GPS Verification Method | End Verification Type: | GPS Verification Method |
| Start Location Variance (Miles): | - | End Location Variance (Miles): | - |
| Scheduled Start Address: | 1025 Coral Club Drive, Coral Springs, Florida, 33071 | Scheduled End Address: | 1025 Coral Club Drive, Coral Springs, Florida, 33071 |
| Scheduled Start Address Type: | - | Scheduled End Address Type: | - |

Related topics:

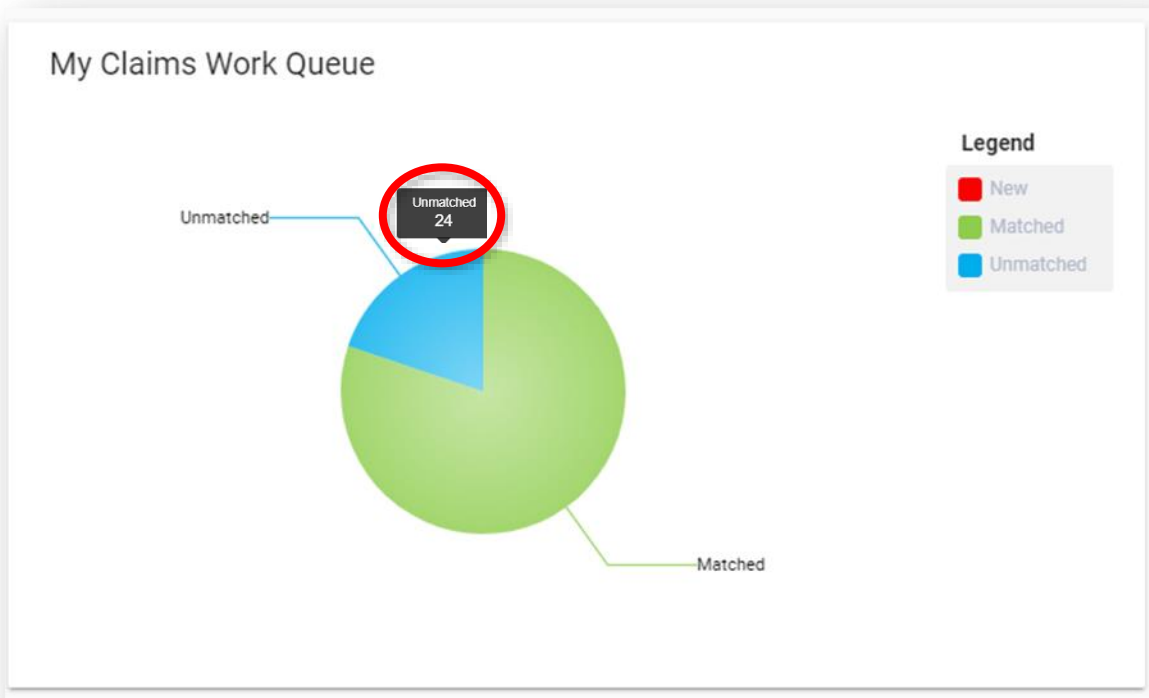
- [Accessing Visit Status Detail](#)
- [Viewing Claims Information](#)
- [Accessing Weekly Visits Detail](#)

Viewing Claims Information

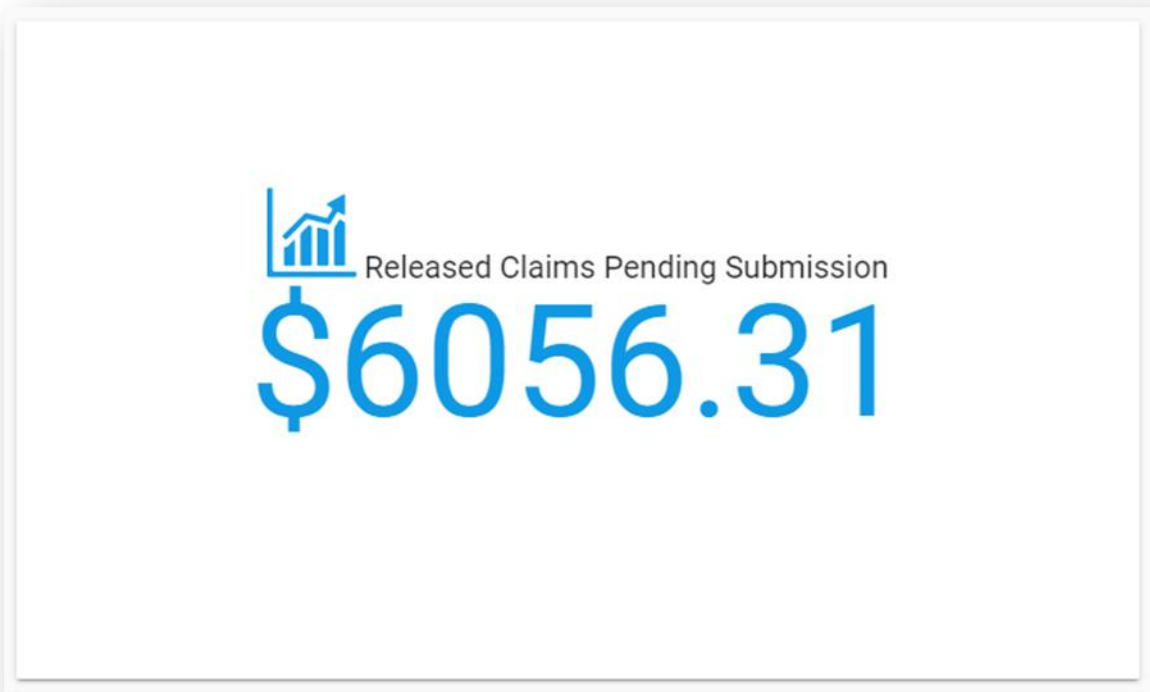
You are here: [Tellus EVV Administrator User Guide](#) > [Monitoring Caregivers and Visits](#) > Administrator Dashboard: Viewing Claims Information

There are three sections of the Dashboard that give summary information about Claims: My Claims Work Queue, Released Claims Pending Submission, and Claims. Scroll down to see them.

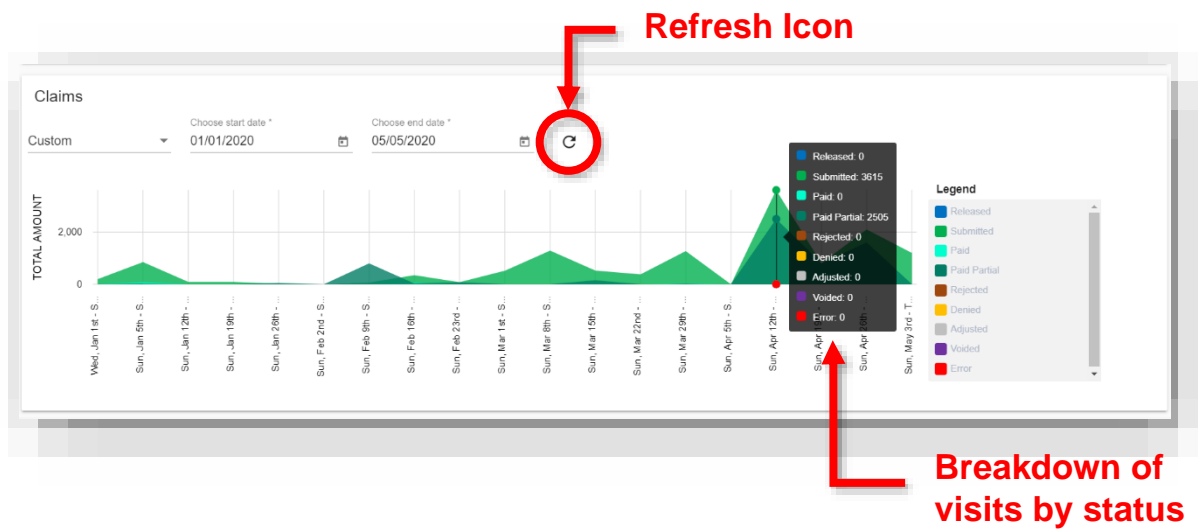
- My Claims Work Queue shows a pie chart of new, matched, and unmatched visits in Work List.
 - Hover your cursor over a section of the pie chart to see the actual number of claims in each section.
 - Click the pie chart to go to the Work List.



- Scroll further to see Released Claims Pending Submission. Here you will see the total dollars you can expect to receive for matched visits that have been released for payment.
 - Click the total to go to Claim Review.



- The Claims section of the dashboard shows a graph of visits by status according to a timeline you choose.
 - Use the dropdown list at left to select **Today**, **This week**, **Last week**, **This month**, **Last month**, or **Custom**. If you select **Custom**, a **Choose start date** and **Choose end date** field will appear; use the dropdown calendar for each to select a date range, and then click the refresh icon at right.
 - Hover your cursor over any point in the graph to see the breakdown of visits by status.



Related topics:

- [Accessing Visit Status Detail](#)
- [Viewing Inbox Alerts](#)
- [Accessing Weekly Visits Detail](#)

Managing Visits

You are here: [Tellus EVV Administrator User Guide](#) > Using the Dashboard

Click a topic below:

[Searching for and Viewing Visits](#)

[Viewing Visits](#)

[Changing the Number of Visits Displayed Per Page](#)

[Searching for a Specific Visit](#)

[Viewing Visit Details](#)

[Completing a Visit](#)

[Canceling a Missed or Late Visit](#)

[Updating a Visit](#)

[Printing Visit Detail](#)

[Deleting a Visit](#)

Searching for and Viewing Visits

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Visits](#) > Searching for and Viewing Visits

In this topic you will find instructions for:

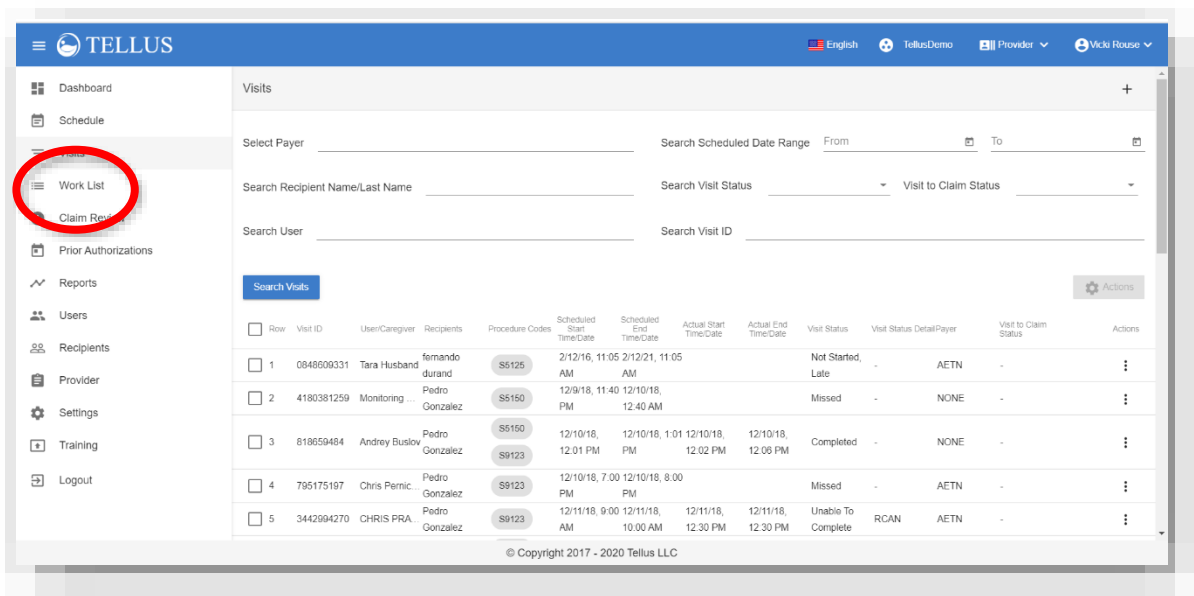
- [Viewing Visits](#)
- [Changing the number of visits displayed per page](#)
- [Searching for a specific visit](#)

Viewing Visits

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Visits](#) > [Searching for and Viewing Visits](#) > Viewing Visits

To view visits:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Visits** option.



The screenshot shows the Tellus EVV Administrator interface. The main menu on the left has 'Work List' circled in red. The 'Visits' page is active, showing a search form with fields for 'Select Payer', 'Search Scheduled Date Range', 'Search Recipient Name/Last Name', 'Search Visit Status', 'Search User', and 'Search Visit ID'. Below the search form is a table of visit records.

| Row | Visit ID | User/Caregiver | Recipients | Procedure Codes | Scheduled Start Time/Date | Scheduled End Time/Date | Actual Start Time/Date | Actual End Time/Date | Visit Status | Visit Status Detail/Payer | Visit to Claim Status | Actions |
|--------------------------|----------|---------------------------|-----------------|-----------------|---------------------------|-------------------------|------------------------|----------------------|--------------------|---------------------------|-----------------------|---------|
| <input type="checkbox"/> | 1 | 0848600331 Tara Husband | fernando durand | S5125 | 2/12/16, 11:05 AM | 2/12/21, 11:05 AM | | | Not Started, Late | AETN | - | ⋮ |
| <input type="checkbox"/> | 2 | 4180381259 Monitoring ... | Pedro Gonzalez | S5150 | 12/9/18, 11:40 PM | 12/10/18, 12:40 AM | | | Missed | NONE | - | ⋮ |
| <input type="checkbox"/> | 3 | 619659484 Andrey Buslov | Pedro Gonzalez | S5150 S9123 | 12/10/18, 12:01 PM | 12/10/18, 1:01 PM | 12/10/18, 12:02 PM | 12/10/18, 12:06 PM | Completed | NONE | - | ⋮ |
| <input type="checkbox"/> | 4 | 795175197 Chris Pernic | Pedro Gonzalez | S9123 | 12/10/18, 7:00 PM | 12/10/18, 8:00 PM | | | Missed | AETN | - | ⋮ |
| <input type="checkbox"/> | 5 | 3442994270 CHRIS PRA | Pedro Gonzalez | S9123 | 12/11/18, 9:00 AM | 12/11/18, 10:00 AM | 12/11/18, 12:30 PM | 12/11/18, 12:30 PM | Unable To Complete | RCAN AETN | - | ⋮ |

© Copyright 2017 - 2020 Tellus LLC

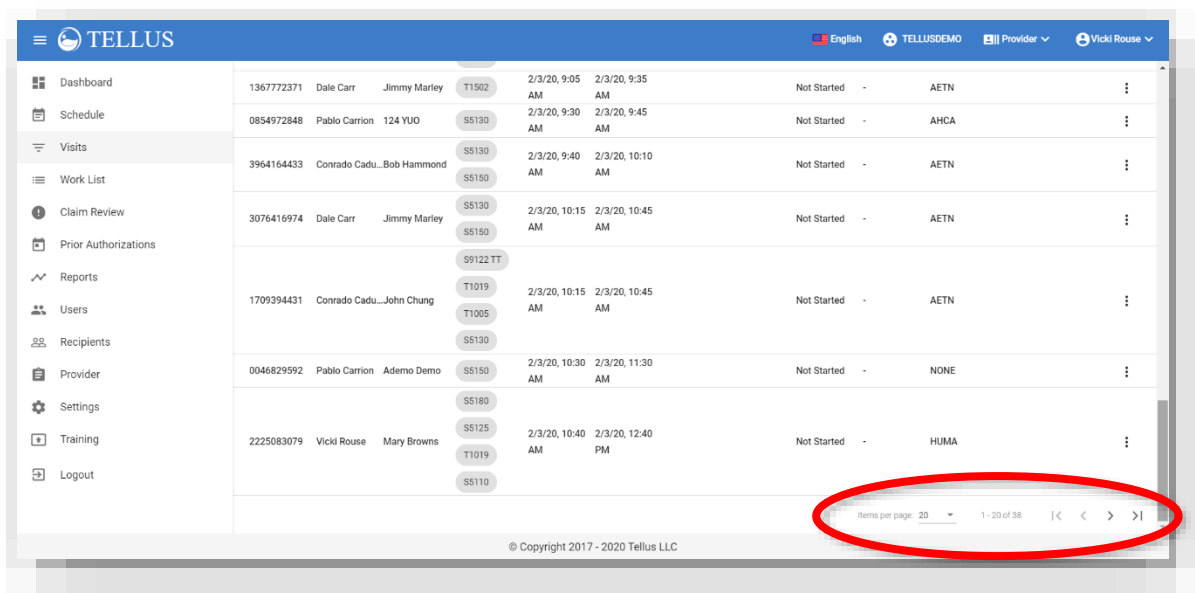
The **Visits** page opens. Scroll to the bottom of the page to see visits for the default time period, **Today**.

Changing the Number of Visits Displayed Per Page

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Visits](#) > [Searching for and Viewing Visits](#) > Changing the Number of Recipients Displayed Per Page

To change the number of visits that appear on each page:

1. Scroll to the bottom of the page.
2. Click the **Items per page** dropdown arrow and make a selection: 20, 50 or 100 Visits per page.



The screenshot shows the Tellus EVV Administrator interface. The top navigation bar includes the Tellus logo, language settings (English), a demo environment (TELLUSDEMO), and user information (Provider, Vicki Rouse). A sidebar on the left contains navigation options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area displays a table of visits with columns for ID, Name, Provider, Status, and Date/Time. The table is currently showing 8 visits. At the bottom right of the table, there is a pagination control showing 'Items per page: 20' and '1 - 20 of 38'. The 'Items per page' dropdown is circled in red.

| ID | Name | Provider | Status | Date/Time | Notes |
|------------|-----------------|--------------|--------|------------------|------------------|
| 1367772371 | Dale Carr | Jimmy Marley | T1502 | 2/3/20, 9:05 AM | 2/3/20, 9:35 AM |
| 0854972848 | Pablo Carrion | 124 YUO | SS130 | 2/3/20, 9:30 AM | 2/3/20, 9:45 AM |
| 3964164433 | Conrado Cadu... | Bob Hammond | SS130 | 2/3/20, 9:40 AM | 2/3/20, 10:10 AM |
| 3076416974 | Dale Carr | Jimmy Marley | SS130 | 2/3/20, 10:15 AM | 2/3/20, 10:45 AM |
| 1709394431 | Conrado Cadu... | John Chung | T1019 | 2/3/20, 10:15 AM | 2/3/20, 10:45 AM |
| 0046829592 | Pablo Carrion | Ademo Demo | SS150 | 2/3/20, 10:30 AM | 2/3/20, 11:30 AM |
| 2225083079 | Vicki Rouse | Mary Browns | SS125 | 2/3/20, 10:40 AM | 2/3/20, 12:40 PM |

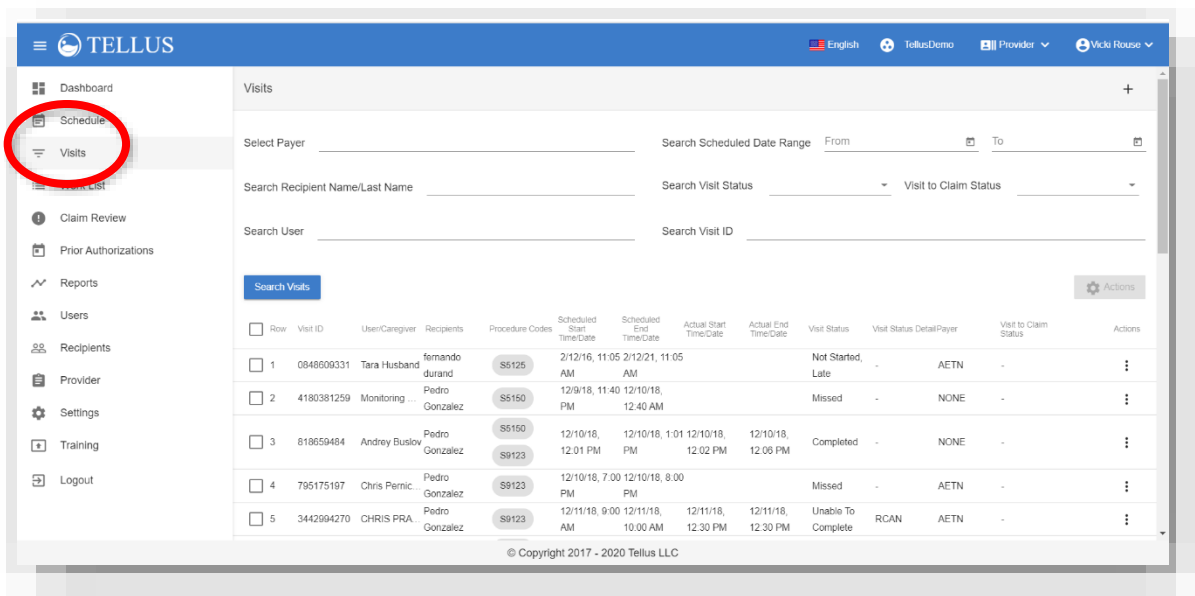
3. If the number of Visits exceeds the space available on your screen, you can view additional visits by clicking the arrows at the bottom of the screen. The Visits as well as the counter at the bottom updates to reflect the range of records presented (for example, 1-20 of 98 visits).

Searching for a Specific Visit

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Visits](#) > [Searching for and Viewing Visits](#) > Searching for a Specific Visit

To find a specific visit:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click **Visits** to open the Visits page.



The screenshot shows the Tellus EVV Administrator interface. The left sidebar contains a menu with items: Dashboard, Schedule, Visits (circled in red), Claim List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area is titled 'Visits' and includes search filters for Payer, Recipient Name/Last Name, User, and Visit ID. A 'Search Visits' button is present. Below the search filters is a table of visits with columns: Row, Visit ID, User/Caregiver, Recipients, Procedure Codes, Scheduled Start Time/Date, Scheduled End Time/Date, Actual Start Time/Date, Actual End Time/Date, Visit Status, Visit Status Detail/Payer, Visit to Claim Status, and Actions.

| Row | Visit ID | User/Caregiver | Recipients | Procedure Codes | Scheduled Start Time/Date | Scheduled End Time/Date | Actual Start Time/Date | Actual End Time/Date | Visit Status | Visit Status Detail/Payer | Visit to Claim Status | Actions |
|-----|------------|----------------|-----------------|-----------------|---------------------------|-------------------------|------------------------|----------------------|--------------------|---------------------------|-----------------------|---------|
| 1 | 0848609331 | Tara Husband | fernando durand | S5125 | 2/12/16, 11:05 AM | 2/12/21, 11:05 AM | | | Not Started, Late | AETN | - | ⋮ |
| 2 | 4180381259 | Monitoring ... | Pedro Gonzalez | S5150 | 12/9/18, 11:40 PM | 12/10/18, 12:40 AM | | | Missed | NONE | - | ⋮ |
| 3 | 819659484 | Andrey Buslov | Pedro Gonzalez | S5150 S9123 | 12/10/18, 12:01 PM | 12/10/18, 1:01 PM | 12/10/18, 12:02 PM | 12/10/18, 12:06 PM | Completed | NONE | - | ⋮ |
| 4 | 795175197 | Chris Pernic | Pedro Gonzalez | S9123 | 12/10/18, 7:00 PM | 12/10/18, 8:00 PM | | | Missed | AETN | - | ⋮ |
| 5 | 3442994270 | CHRIS PRA | Pedro Gonzalez | S9123 | 12/11/18, 9:00 AM | 12/11/18, 10:00 AM | 12/11/18, 12:30 PM | 12/11/18, 12:30 PM | Unable To Complete | RCAN AETN | - | ⋮ |

© Copyright 2017 - 2020 Tellus LLC

3. You can search for **Visits** by using one or a combination of the following.

- **Date:** The default value is **Today**, or you can select from the options listed below.
 - Tomorrow
 - This Week
 - Next Week
 - Last Week
 - 2 Weeks Ago
 - This Month
 - Last Month

- **Custom:** When you make this selection, two additional fields display. Use the [calendar icon](#) in the **Choose Start Date** and **Choose End Date** fields to select the date range you want to see visits for.
- **Visit status:** You can choose from these visit statuses:
 - **None**
 - **Completed**
 - **Completed, Late:** The visit was started late, but is now complete.
 - **In Progress**
 - **In Progress, Late:** The visit was started late but is now in progress
 - **Missed**
 - **Not Started**
 - **Not Started, Late:** The visit is late and has not yet been started
 - **Unable to Complete:** The Caregiver completed the visit but was not able to mark the visit complete on their Mobile app.
- **Username:** To find a visit by **User**, or Caregiver, type all or part of the Caregiver name in the **User** field. A list of Users with the characters that match your entry will display. Make a selection from the list.
- **Recipient name:** To find visits by **Recipient**, type all or part of a Recipient name in the **Recipient** field.
- **Visit ID:** A Visit ID is assigned when the visit is schedule; if you have it, you can enter it here

Note: The Visit ID appears only in the Visits menu option.

- **Visit to Claim Status:** Choose None, Success, or Error.
 - **None:** The visit has not been completed.
 - **Success:** The visit successfully transferred to the Work List for claims processing when the visit is completed.
 - **Error:** The visit did not transfer to the Work List due to an error that occurred during the visit or visit completion.

Note: Visits that need to be corrected must be done by someone who has the User Role Admin or Billing. See the Tellus EVV Claims User Guide, which is available from the Training menu option.

4. Click ***Search Visits*** after making your entries and selections.

Related topics:

- [Adding or Scheduling a Visit](#)
- [Viewing Visit Details](#)
- [Completing a Visit](#)
- [Canceling a Missed or Late Visit](#)
- [Updating a Visit](#)
- [Printing Visit Detail](#)
- [Deleting a Visit](#)

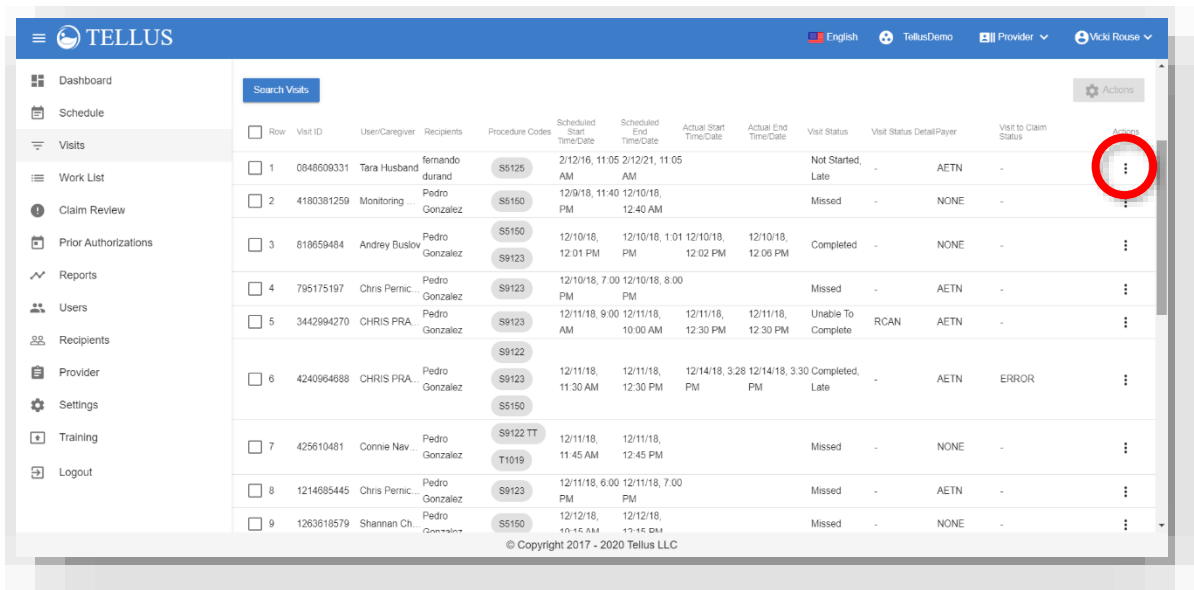
Viewing Visit Details

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Visits](#) > Viewing Visit Details

There three ways you can access visit details.

- From the Dashboard, click any status tile across the top of the page, or any section of the graph shown in **Weekly Visits** to see a list of visits.
- From the **Main Menu**, click **Visits** and [find the visit](#) you want to view.
- You can also click **Schedule** on the **Main Menu** and find the visit you want to view.

From the list of visits on the Dashboard or Visits page, click the vertical dots to open the **Visit**. When the Visit window opens, you will see options for editing, cancelling, completing, or printing the visit, depending on the visit status.



| Row | Visit ID | User/Caregiver | Recipients | Procedure Codes | Scheduled Start Time/Date | Scheduled End Time/Date | Actual Start Time/Date | Actual End Time/Date | Visit Status | Visit Status Detail/Payer | Visit to Claim Status | Actions |
|--------------------------|----------|--------------------------|-----------------|-------------------------|---------------------------|-------------------------|------------------------|----------------------|--------------------|---------------------------|-----------------------|---------|
| <input type="checkbox"/> | 1 | 08486090331 Tara Husband | fernando durand | S5125 | 2/12/16, 11:05 AM | 2/12/21, 11:05 AM | | | Not Started, Late | AETN | - | ⋮ |
| <input type="checkbox"/> | 2 | 4180381259 Monitoring | Pedro Gonzalez | S5150 | 12/9/18, 11:40 PM | 12/10/18, 12:40 AM | | | Missed | NONE | - | ⋮ |
| <input type="checkbox"/> | 3 | 618659484 Andrey Buslov | Pedro Gonzalez | S5150 S9123 | 12/10/18, 12:01 PM | 12/10/18, 1:01 PM | 12/10/18, 12:02 PM | 12/10/18, 12:06 PM | Completed | NONE | - | ⋮ |
| <input type="checkbox"/> | 4 | 795175197 Chris Pernic | Pedro Gonzalez | S9123 | 12/10/18, 7:00 PM | 12/10/18, 8:00 PM | | | Missed | AETN | - | ⋮ |
| <input type="checkbox"/> | 5 | 3442994270 CHRIS PRA | Pedro Gonzalez | S9123 | 12/11/18, 9:00 AM | 12/11/18, 10:00 AM | 12/11/18, 12:30 PM | 12/11/18, 12:30 PM | Unable To Complete | RCAN AETN | - | ⋮ |
| <input type="checkbox"/> | 6 | 4240964688 CHRIS PRA | Pedro Gonzalez | S9122 S9123 S5150 | 12/11/18, 11:30 AM | 12/11/18, 12:30 PM | 12/14/18, 3:28 PM | 12/14/18, 3:30 PM | Completed, Late | AETN | ERROR | ⋮ |
| <input type="checkbox"/> | 7 | 425610481 Connie Nav | Pedro Gonzalez | S9122 TT T1019 | 12/11/18, 11:45 AM | 12/11/18, 12:45 PM | | | Missed | NONE | - | ⋮ |
| <input type="checkbox"/> | 8 | 1214685445 Chris Pernic | Pedro Gonzalez | S9123 | 12/11/18, 6:00 PM | 12/11/18, 7:00 PM | | | Missed | AETN | - | ⋮ |
| <input type="checkbox"/> | 9 | 1263618579 Shanna Ch | Pedro Gonzalez | S5150 | 12/12/18, 10:45 AM | 12/12/18, 11:45 AM | | | Missed | NONE | - | ⋮ |

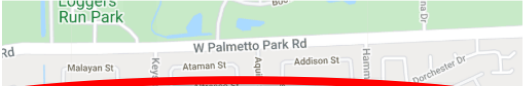

If you are using the Schedule option, click any visit that appears on the schedule or calendar.

Either way, a **Visit** page like the one shown below will open.

Visit

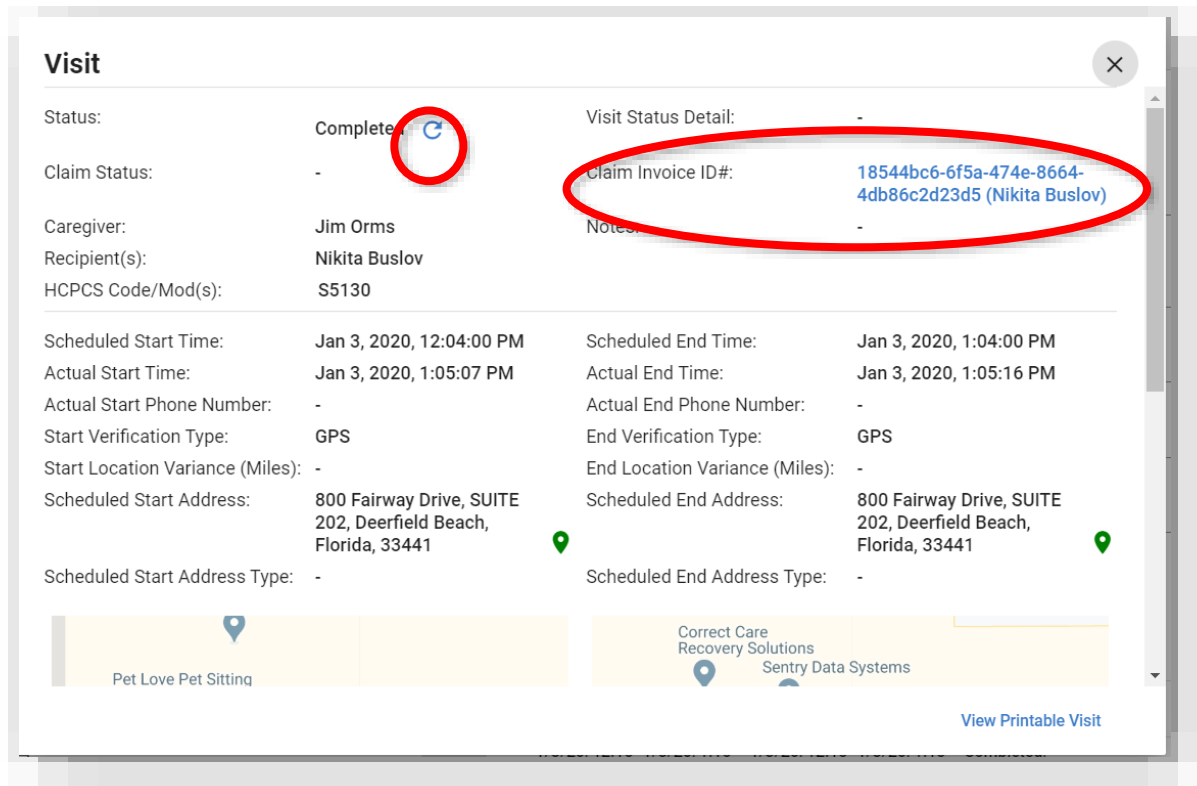
| | | | |
|--------------------|-----------------|----------------------|---|
| Status: | Missed | Visit Status Detail: | - |
| Claim Status: | - | Claim Invoice ID#: | - |
| Claim Status: | - | Claim Invoice ID#: | - |
| Caregiver: | Dale Carr | Notes: | - |
| Recipient(s): | Fred Flintstone | | |
| HCPCS Code/Mod(s): | S5135 S5130 | | |

| | | | |
|----------------------------------|--|--------------------------------|--|
| Scheduled Start Time: | Jan 1, 2020, 1:05:27 AM | Scheduled End Time: | Jan 1, 2020, 2:05:27 AM |
| Actual Start Time: | - | Actual End Time: | - |
| Actual Start Phone Number: | - | Actual End Phone Number: | - |
| Start Verification Type: | - | End Verification Type: | - |
| Start Location Variance (Miles): | - | End Location Variance (Miles): | - |
| Scheduled Start Address: | Boulder Street, Boca Raton, Florida, 33428 | Scheduled End Address: | Boulder Street, Boca Raton, Florida, 33428 |
| Scheduled Start Address Type: | - | Scheduled End Address Type: | - |




[Edit visit](#) [Cancel visit](#) [Complete visit](#) [View Printable Visit](#)

If the visit has the status Complete or Complete, Late, you will see a “reload” icon that you can click to populate the Claim Invoice ID# if it is not already there and transfer the Visit to the Work List. Click the Claim Invoice ID to see the claim in the Work List.



Visit

Status: Complete 

Claim Status: -

Caregiver: Jim Orms

Recipient(s): Nikita Buslov

HCPSC Code/Mod(s): S5130

Visit Status Detail: -

Claim Invoice ID#: [18544bc6-6f5a-474e-8664-4db86c2d23d5 \(Nikita Buslov\)](#)

Notes: -


Scheduled Start Time: Jan 3, 2020, 12:04:00 PM

Actual Start Time: Jan 3, 2020, 1:05:07 PM

Actual Start Phone Number: -

Start Verification Type: GPS

Start Location Variance (Miles): -

Scheduled Start Address: 800 Fairway Drive, SUITE 202, Deerfield Beach, Florida, 33441 

Scheduled Start Address Type: -


Scheduled End Time: Jan 3, 2020, 1:04:00 PM

Actual End Time: Jan 3, 2020, 1:05:16 PM

Actual End Phone Number: -

End Verification Type: GPS

End Location Variance (Miles): -

Scheduled End Address: 800 Fairway Drive, SUITE 202, Deerfield Beach, Florida, 33441 

Scheduled End Address Type: -

Pet Love Pet Sitting

Correct Care Recovery Solutions

Sentry Data Systems

[View Printable Visit](#)

Note: Claim Review, Work List and Prior Authorizations are used for claim processing and are discussed in the Tellus EVV Claims User Guide, which is available from the Training menu option.

Related topics:

- [Adding or Scheduling a Visit](#)
- [Searching for and Viewing Visits](#)
- [Completing a Visit](#)
- [Canceling a Missed or Late Visit](#)
- [Updating a Visit](#)
- [Printing Visit Detail](#)
- [Deleting a Visit](#)

Completing a Visit

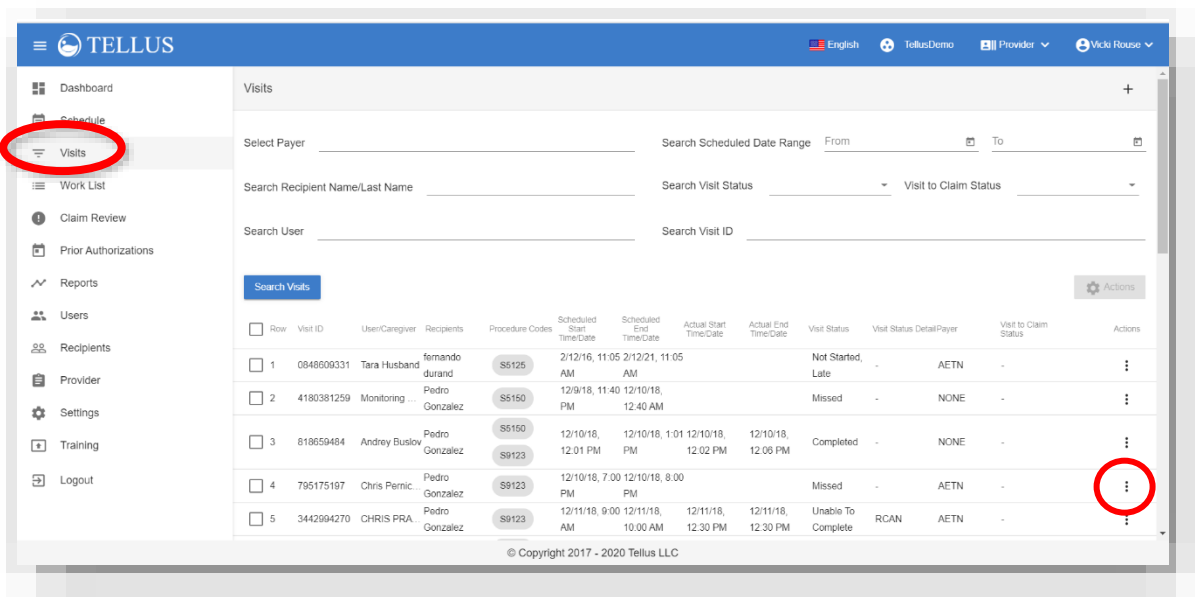
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Visits](#) > Completing a Visit

If a Caregiver does not complete a visit using their Tellus EVV mobile app for some reason – the Caregiver forgot to check out, for example – you can complete the visit manually in the Tellus EVV Administrator Console. You will need to provide a reason for completing the visit manually.

You can complete visits that have these statuses: Missed; In Progress; In Progress, Late; Not Started; and Not Started, Late.

To complete a visit using the Administrator Console:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click **Visits**.

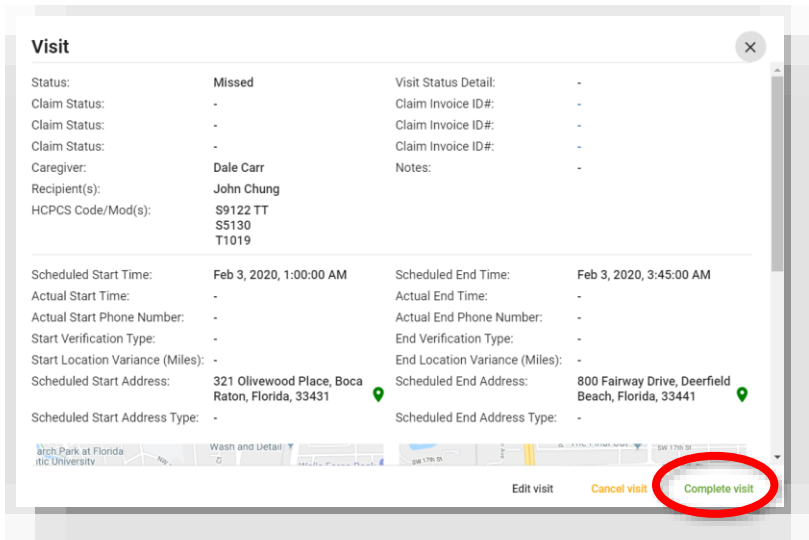


The screenshot displays the 'Visits' page in the Tellus EVV Administrator Console. The left sidebar contains a menu with 'Visits' highlighted and circled in red. The main content area features search filters for Payer, Recipient Name, User, and Visit ID. Below the filters is a table of visits. The table has the following columns: Row, Visit ID, User/Caregiver, Recipients, Procedure Codes, Scheduled Start Time/Date, Scheduled End Time/Date, Actual Start Time/Date, Actual End Time/Date, Visit Status, Visit Status Detail/Payer, Visit to Claim Status, and Actions. The fourth row of the table is circled in red, specifically the 'Actions' column which contains a vertical ellipsis icon.

| Row | Visit ID | User/Caregiver | Recipients | Procedure Codes | Scheduled Start Time/Date | Scheduled End Time/Date | Actual Start Time/Date | Actual End Time/Date | Visit Status | Visit Status Detail/Payer | Visit to Claim Status | Actions |
|-----|------------|----------------|-----------------|-----------------|---------------------------|-------------------------|------------------------|----------------------|--------------------|---------------------------|-----------------------|---------|
| 1 | 0846609331 | Tara Husband | fernando durand | S5125 | 2/12/16, 11:05 AM | 2/12/21, 11:05 AM | | | Not Started, Late | - AETN | - | ⋮ |
| 2 | 4180381259 | Monitoring ... | Pedro Gonzalez | S5150 | 12/9/18, 11:40 PM | 12/10/18, 12:40 AM | | | Missed | - NONE | - | ⋮ |
| 3 | 819659484 | Andrey Buslov | Pedro Gonzalez | S5150 S9123 | 12/10/18, 12:01 PM | 12/10/18, 1:01 PM | 12/10/18, 12:02 PM | 12/10/18, 12:06 PM | Completed | - NONE | - | ⋮ |
| 4 | 795175197 | Chris Pernic | Pedro Gonzalez | S9123 | 12/10/18, 7:00 PM | 12/10/18, 8:00 PM | | | Missed | - AETN | - | ⋮ |
| 5 | 3442994270 | CHRIS PRA | Pedro Gonzalez | S9123 | 12/11/18, 9:00 AM | 12/11/18, 10:00 AM | 12/11/18, 12:30 PM | 12/11/18, 12:30 PM | Unable To Complete | RCAN AETN | - | ⋮ |

3. [Find the visit](#) you want to complete.

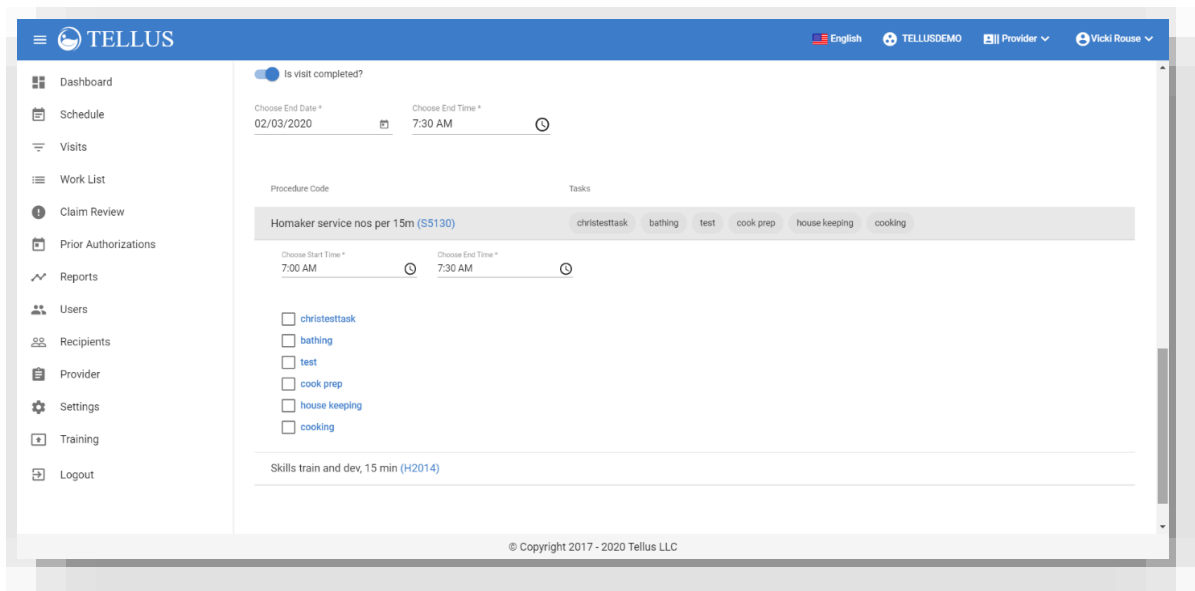
- When you see the visit that you want to complete in the search results, click the submenu icon (vertical dots) on the right to see details about the visit.



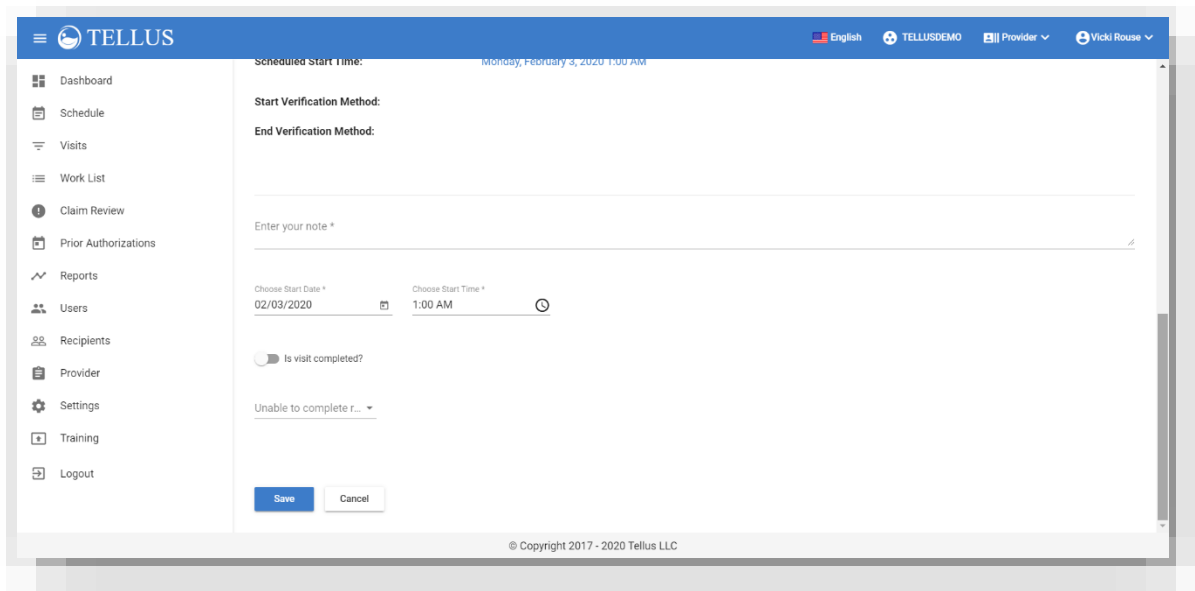
- At the bottom of the **Visit** page, click **Complete visit**.

Note: See [Accessing Schedule Detail from the Administrator Console](#) and [Viewing the Menu](#) for additional information.

6. Scroll to the bottom of the page. All of the following entries are required:
 - **Enter your note:** Enter notes about the visit.
 - **Choose Start Date:** The date the visit was scheduled displays here. If it is different, click the [calendar icon](#) at right to select the correct start date.
 - **Choose Start Time:** The time the visit was scheduled displays here. If it is different, click the [clock icon](#) at right to select the correct start time.
 - **Is visit completed?** If the visit is complete slide the toggle to the right. Blue indicates that the visit is completed and all services and tasks display.



If the visit is still not complete use the **Unable to Complete Reason Code** drop-down list to select code for the reason why it is not complete.



7. Click **Save** to save and complete the visit. You return to the **Visits** page.

Or, you can click **Cancel** to exit the **Complete visit** page. Your entries and selections will not be saved.

Related topics:

- [Adding or Scheduling a Visit](#)
- [Searching for and Viewing Visits](#)
- [Viewing Visit Details](#)
- [Canceling a Missed or Late Visit](#)
- [Updating a Visit](#)
- [Printing Visit Detail](#)
- [Deleting a Visit](#)

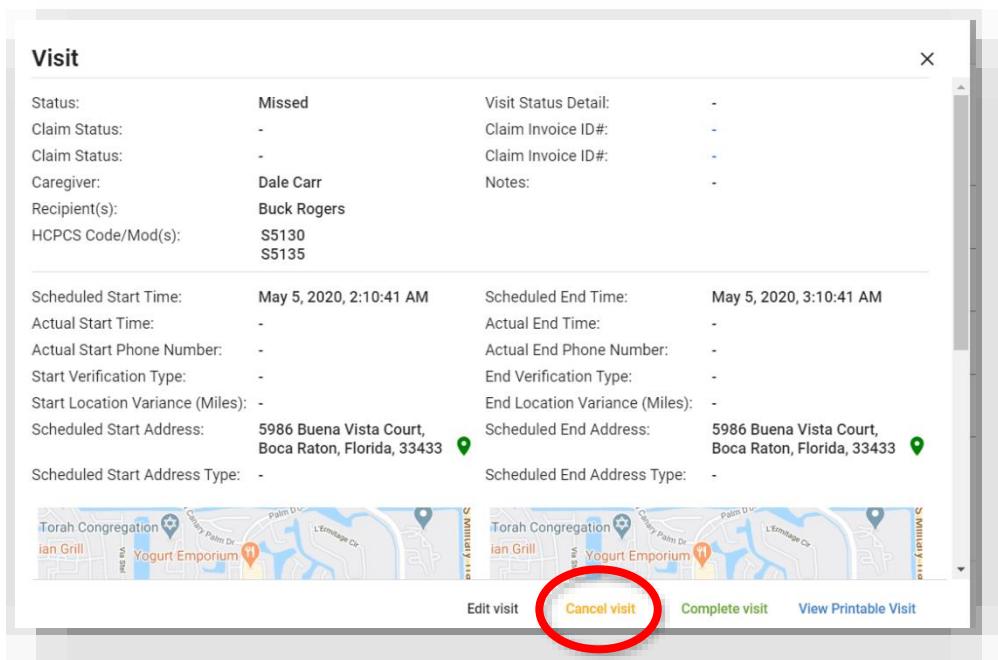
Canceling a Missed or Late Visit

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Visits](#) > Canceling a Missed or Late Visit

You can cancel a visit with the status Missed or Not Started, Late. If the visit is scheduled to happen in the future, you will have the option to [delete the visit](#) rather than cancel it.

To cancel a visit:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click **Visits**.
3. [Find the visit](#) you want to cancel.
4. When you see the visit that you want to cancel in the search results, click the submenu icon (vertical dots) to view details about the visit.
5. Click **Cancel visit**.



Visit [Close]

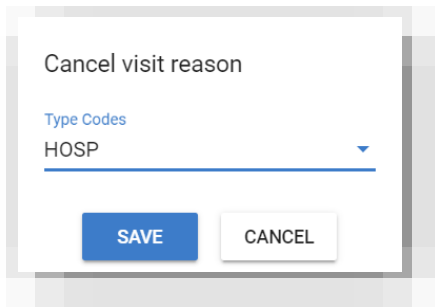
| | | | |
|--------------------|----------------|----------------------|---|
| Status: | Missed | Visit Status Detail: | - |
| Claim Status: | - | Claim Invoice ID#: | - |
| Claim Status: | - | Claim Invoice ID#: | - |
| Caregiver: | Dale Carr | Notes: | - |
| Recipient(s): | Buck Rogers | | |
| HCPCS Code/Mod(s): | S5130 S5135 | | |

| | | | |
|----------------------------------|---|--------------------------------|---|
| Scheduled Start Time: | May 5, 2020, 2:10:41 AM | Scheduled End Time: | May 5, 2020, 3:10:41 AM |
| Actual Start Time: | - | Actual End Time: | - |
| Actual Start Phone Number: | - | Actual End Phone Number: | - |
| Start Verification Type: | - | End Verification Type: | - |
| Start Location Variance (Miles): | - | End Location Variance (Miles): | - |
| Scheduled Start Address: | 5986 Buena Vista Court, Boca Raton, Florida, 33433 | Scheduled End Address: | 5986 Buena Vista Court, Boca Raton, Florida, 33433 |
| Scheduled Start Address Type: | - | Scheduled End Address Type: | - |

Torah Congregation, Yogan Grill, Yogurt Emporium, L'Ermitage Cr., Palm Uv., Embridge Cr., Boca Raton, Florida, 33433

[Edit visit](#)
[Cancel visit](#)
[Complete visit](#)
[View Printable Visit](#)

6. When the **Cancel Visit** page opens, use the drop-down list to select the reason the visit is being cancelled.

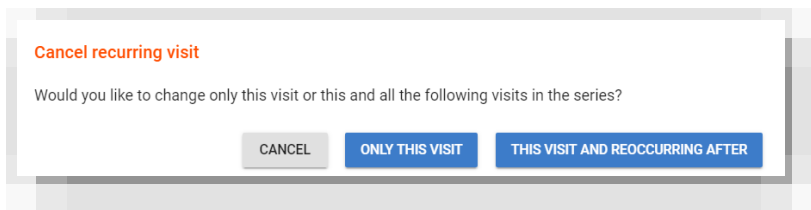


Cancel visit reason

Type Codes
HOSP

SAVE CANCEL

7. Click **Save**.
8. If the visit is a recurring visit, you will have the option to cancel just the visit you selected, or all visits.



Cancel recurring visit

Would you like to change only this visit or this and all the following visits in the series?

CANCEL ONLY THIS VISIT THIS VISIT AND REOCCURRING AFTER

The canceled visit is not removed from the **Schedule**. The **Status** of the scheduled visit will change to “Unable to Complete.”

Related topics:

- [Adding or Scheduling a Visit](#)
- [Searching for and Viewing Visits](#)
- [Viewing Visit Details](#)
- [Completing a Visit](#)
- [Updating a Visit](#)
- [Printing Visit Detail](#)
- [Deleting a Visit](#)

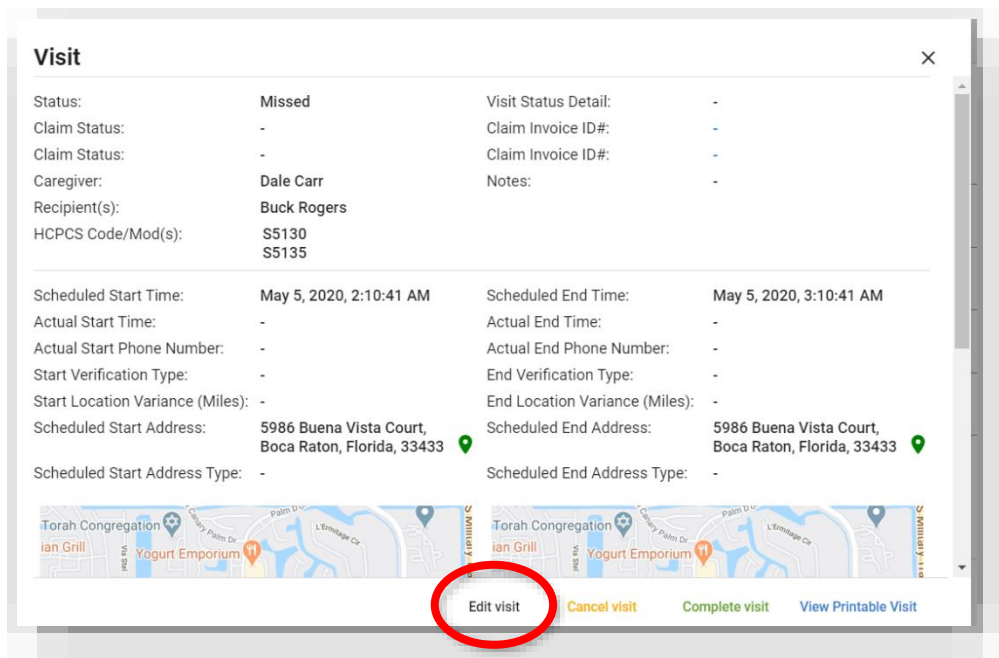
Updating a Visit

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Visits](#) > Updating a Visit

You can update visits that have these statuses: Missed; Not Started; and Not Started, Late.

You can update a visit on the **Visit detail** page.

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click **Visits**.
3. [Search for the visit](#) you want to update.
4. Click the submenu icon (vertical dots) to open a page that shows visit details.



Visit [Close]

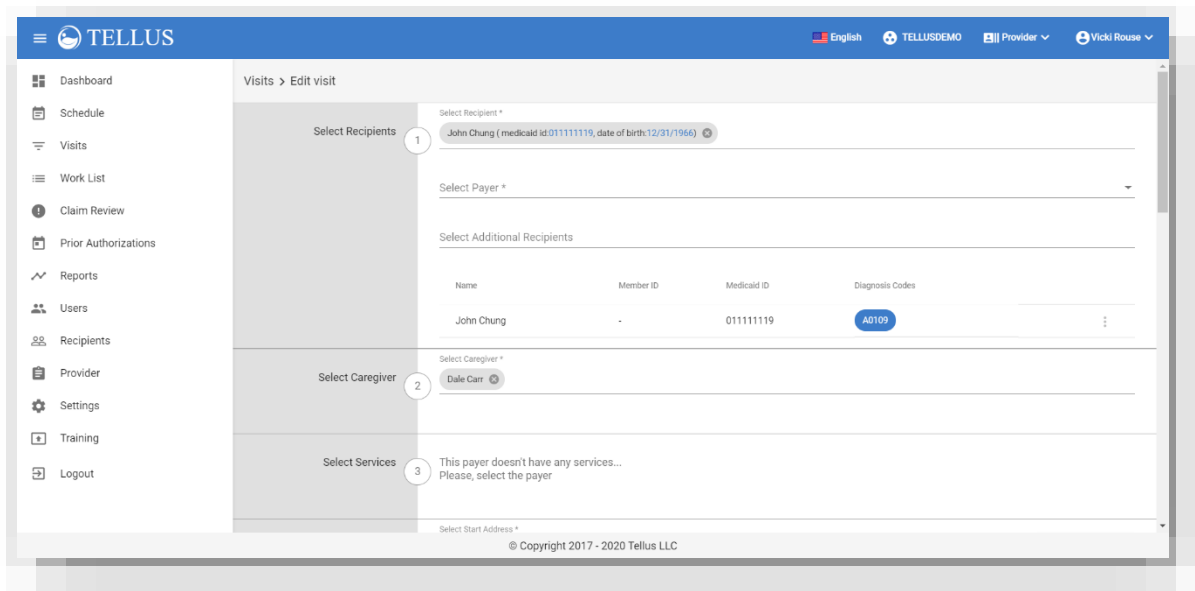
| | | | |
|--------------------|----------------|----------------------|---|
| Status: | Missed | Visit Status Detail: | - |
| Claim Status: | - | Claim Invoice ID#: | - |
| Claim Status: | - | Claim Invoice ID#: | - |
| Caregiver: | Dale Carr | Notes: | - |
| Recipient(s): | Buck Rogers | | |
| HCPSC Code/Mod(s): | S5130 S5135 | | |

| | | | |
|----------------------------------|---|--------------------------------|---|
| Scheduled Start Time: | May 5, 2020, 2:10:41 AM | Scheduled End Time: | May 5, 2020, 3:10:41 AM |
| Actual Start Time: | - | Actual End Time: | - |
| Actual Start Phone Number: | - | Actual End Phone Number: | - |
| Start Verification Type: | - | End Verification Type: | - |
| Start Location Variance (Miles): | - | End Location Variance (Miles): | - |
| Scheduled Start Address: | 5986 Buena Vista Court, Boca Raton, Florida, 33433 | Scheduled End Address: | 5986 Buena Vista Court, Boca Raton, Florida, 33433 |
| Scheduled Start Address Type: | - | Scheduled End Address Type: | - |

Torah Congregation, Ian Grill, Yogurt Emporium, Palm D, L'Embrage Cr, Summit St

Edit visit Cancel visit Complete visit View Printable Visit

5. Click **Edit visit** to view the **Edit visit** page.



6. Make entries and selections just as you did when you [added a new visit](#).
7. When your additions, deletions, and updates are complete, click **Update** to save the changes to the visit.

If the visit *does not* repeat, the **Edit Visit** screen will close.

If the visit *does* repeat, the Edit Recurring Visits popup opens. Chose how you want the changes applied:

- **ONLY TO THIS VISIT:** Changes will be applied to the visit date and time selected in the Select Date and Time section.
 - **THIS VISIT AND REOCCURRING AFTER:** Changes will be applied to this visit and all future visits.
8. The system will compare changes to other scheduled visits. If there are errors – for example, if the changes you made cause visits to overlap for a Caregiver – an error message displays and gives you two options:
 - **MAKE CORRECTIONS:** Click this button to return to the **Edit visits** page to make additional corrections. For example, there may be a missing diagnosis, or incorrect service code. Click **Update** when you finish.
 - **SAVE VISIT WITHOUT CORRECTIONS:** Save changes as you entered them, without making additional changes.

Related topics:

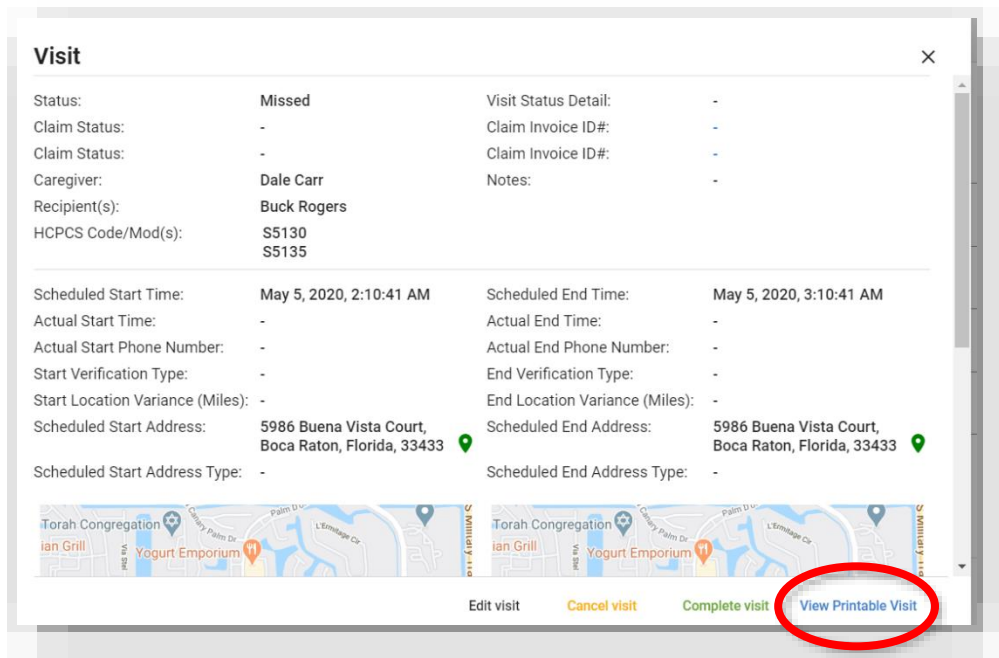
- [Adding or Scheduling a Visit](#)
- [Searching for and Viewing Visits](#)
- [Viewing Visit Details](#)
- [Completing a Visit](#)
- [Canceling a Missed or Late Visit](#)
- [Printing Visit Detail](#)
- [Deleting a Visit](#)

Printing Visit Detail

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Visits](#) > Printing Visit Detail

You can print visit detail for a visit of any status.

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click **Visits**.
3. [Find the visit](#) you want to print.



Visit [X]

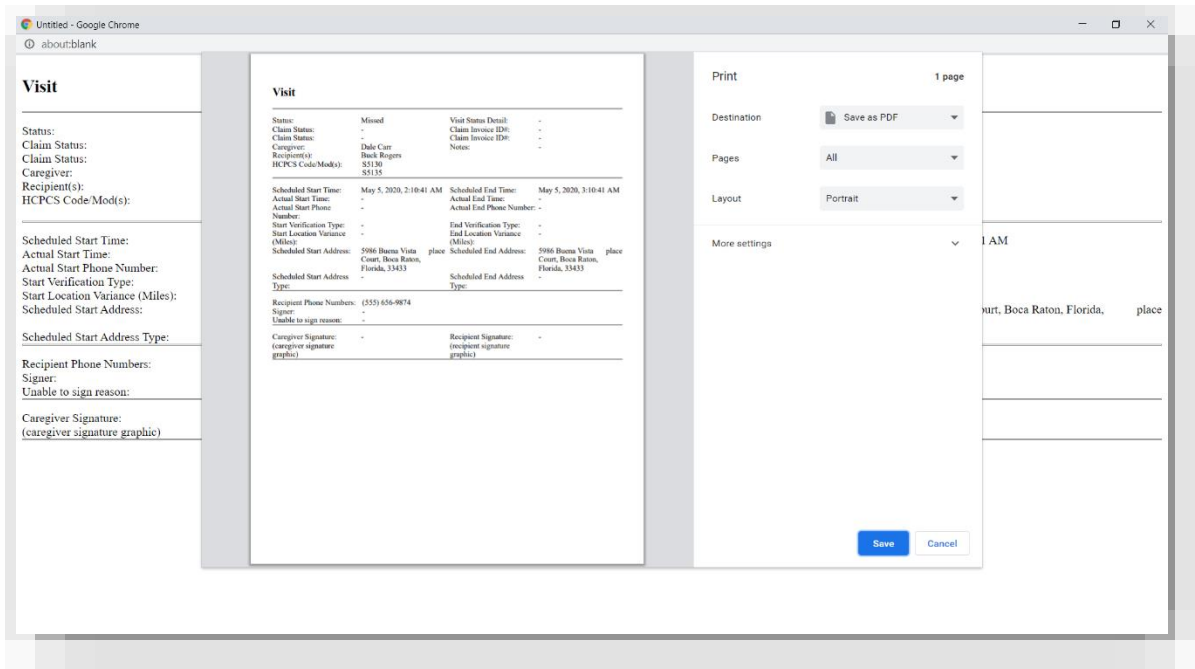
| | | | |
|---------------------|----------------|----------------------|---|
| Status: | Missed | Visit Status Detail: | - |
| Claim Status: | - | Claim Invoice ID#: | - |
| Claim Status: | - | Claim Invoice ID#: | - |
| Caregiver: | Dale Carr | Notes: | - |
| Recipient(s): | Buck Rogers | | |
| HCP/CS Code/Mod(s): | S5130 S5135 | | |

| | | | |
|----------------------------------|---|--------------------------------|---|
| Scheduled Start Time: | May 5, 2020, 2:10:41 AM | Scheduled End Time: | May 5, 2020, 3:10:41 AM |
| Actual Start Time: | - | Actual End Time: | - |
| Actual Start Phone Number: | - | Actual End Phone Number: | - |
| Start Verification Type: | - | End Verification Type: | - |
| Start Location Variance (Miles): | - | End Location Variance (Miles): | - |
| Scheduled Start Address: | 5986 Buena Vista Court, Boca Raton, Florida, 33433 | Scheduled End Address: | 5986 Buena Vista Court, Boca Raton, Florida, 33433 |
| Scheduled Start Address Type: | - | Scheduled End Address Type: | - |

Torah Congregation
ian Grill
Yogurt Emporium

Edit visit Cancel visit Complete visit **View Printable Visit**

4. Click **View Printable Visit**.



5. Choose your **Destination**, **Pages**, and other print criteria, and then click **Print** (or **Save** for pdfs).

Related topics:

- [Adding or Scheduling a Visit](#)
- [Searching for and Viewing Visits](#)
- [Viewing Visit Details](#)
- [Completing a Visit](#)
- [Canceling a Missed or Late Visit](#)
- [Updating a Visit](#)
- [Deleting a Visit](#)

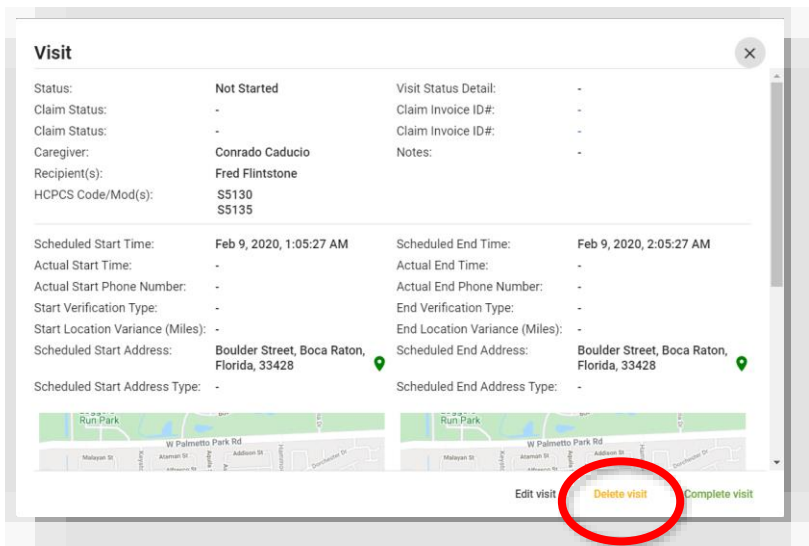
Deleting a Visit

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Visits](#) > Deleting a Visit

You can delete a visit *only if it is happening in the future*. If the visit was scheduled to start in the past (in other words, is late) you will have the option to [cancel the visit](#) rather than delete it.

To delete a visit:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click **Visits**.
3. Find the visit you want to delete.
4. When you see the visit that you want to delete in the search results, click the submenu icon (vertical dots) to view details about the visit.



5. Click **Delete visit**.

Related topics:

- [Adding or Scheduling a Visit](#)
- [Searching for and Viewing Visits](#)
- [Viewing Visit Details](#)
- [Completing a Visit](#)
- [Canceling a Missed or Late Visit](#)
- [Updating a Visit](#)
- [Printing Visit Detail](#)

Scheduling

You are here: [Tellus EVV Administrator User Guide](#) > Scheduling

Click a topic below:

[Viewing the Schedule](#)

[Scheduler View: Overview](#)

[Calendar View: Overview](#)

[General Navigation for Scheduler or Calendar View](#)

[Adding or Scheduling a Visit](#)

[Adding a Visit: Entries](#)

[Select Recipients](#)

[Select Caregiver](#)

[Select Services](#)

[Select Visit Locations](#)

[Select Date and Time](#)

[Select Visit Recurrence](#)

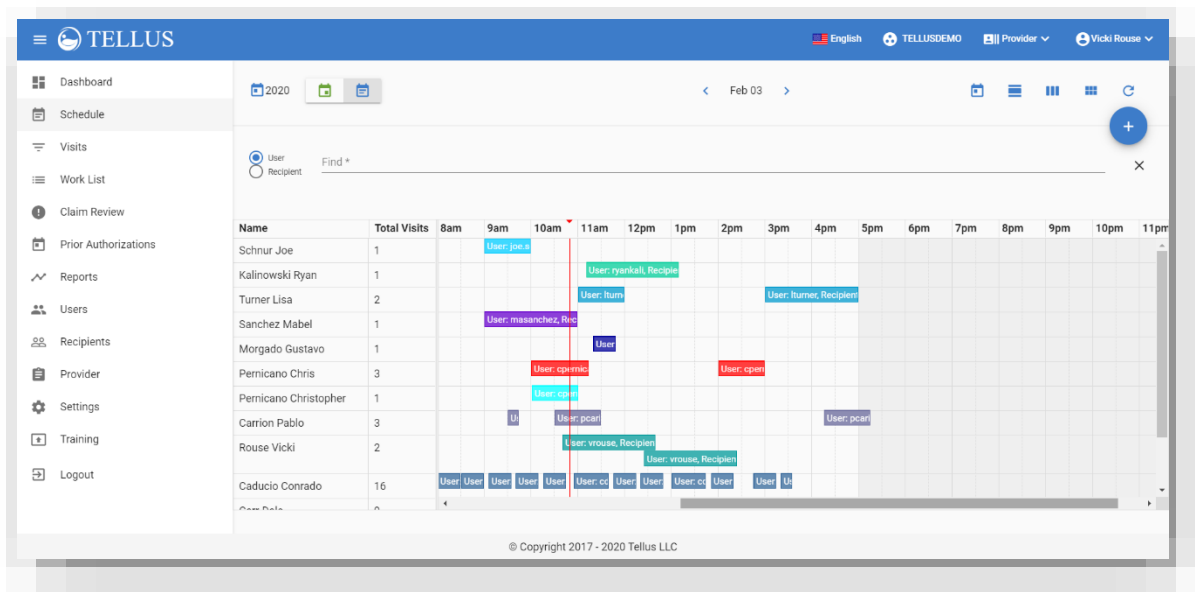
Viewing the Schedule

You are here: [Tellus EVV Administrator User Guide](#) > [Scheduling](#) > Viewing the Schedule

To see the schedule of visits for Caregivers and Recipients:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Select the **Schedule** option to open the **Schedule**

By default, you will see all Users who are scheduled for visits this week.

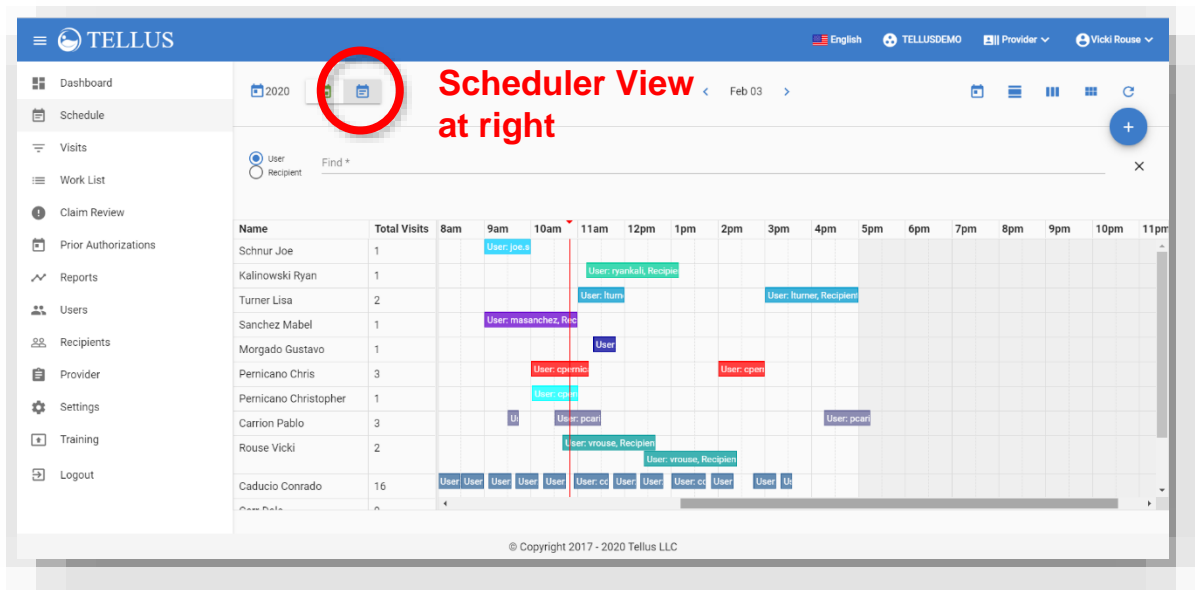


| Name | Total Visits | 8am | 9am | 10am | 11am | 12pm | 1pm | 2pm | 3pm | 4pm | 5pm | 6pm | 7pm | 8pm | 9pm | 10pm | 11pm |
|-----------------------|--------------|------|-------------|----------------------|--------------------------|----------|------|------|----------|-------------------------|------|-----|-----|-----|-----|------|------|
| Schnur Joe | 1 | | User: joe.a | | | | | | | | | | | | | | |
| Kalinowski Ryan | 1 | | | | User: ryan.kali, Recipis | | | | | | | | | | | | |
| Turner Lisa | 2 | | | | User: lturn | | | | | User: lturn, Recipients | | | | | | | |
| Sanchez Mabel | 1 | | | User: masanchez, Rec | | | | | | | | | | | | | |
| Morgado Gustavo | 1 | | | | User | | | | | | | | | | | | |
| Perricano Chris | 3 | | | | User: cperric | | | | | User: cperr | | | | | | | |
| Perricano Christopher | 1 | | | | User: cperr | | | | | | | | | | | | |
| Carrion Pablo | 3 | | | User | User: pcarr | | | | | | | | | | | | |
| Rouse Vicki | 2 | | | | User: vrouse, Recipient | | | | | | | | | | | | |
| Caducio Conrado | 16 | User | User | User | User | User: cc | User | User | User: cc | User | User | | | | | | |

There are two views for the Schedule: [Scheduler View](#) and [Calendar View](#). Each is described in the sections that follow. Navigation is similar for both and is described in [General Navigation for Scheduler or Calendar View](#).

Scheduler View: Overview

You are here: [Tellus EVV Administrator User Guide](#) > [Scheduling](#) > [Viewing the Schedule](#) > Scheduler View: Overview



Scheduler View at right

| Name | Total Visits | 8am | 9am | 10am | 11am | 12pm | 1pm | 2pm | 3pm | 4pm | 5pm | 6pm | 7pm | 8pm | 9pm | 10pm | 11pm |
|-----------------------|--------------|------|----------------------------|---------------|---------------------------|----------|------|------|---------------|------------------------|-------------|------|------|------|------|------|------|
| Schnur Joe | 1 | | User: joe-a | | | | | | | | | | | | | | |
| Kalinowski Ryan | 1 | | | | User: ryankali, Recipient | | | | | | | | | | | | |
| Turner Lisa | 2 | | | | User: lturn | | | | | User: lturn, Recipient | | | | | | | |
| Sanchez Mabel | 1 | | User: masanchez, Recipient | | | | | | | | | | | | | | |
| Morgado Gustavo | 1 | | | | User | | | | | | | | | | | | |
| Perricano Chris | 3 | | | | User: cperric | | | | User: cperric | | | | | | | | |
| Perricano Christopher | 1 | | | User: cperric | | | | | | | | | | | | | |
| Carrion Pablo | 3 | | User | | User: pcarr | | | | | | User: pcarr | | | | | | |
| Rouse Vicki | 2 | | | | User: vrouse, Recipient | | | | | | | | | | | | |
| Caducio Conrado | 16 | User | User | User | User | User: cc | User | User | User: cc | User | User | User | User | User | User | User | User |

The **Scheduler view** shows the following:

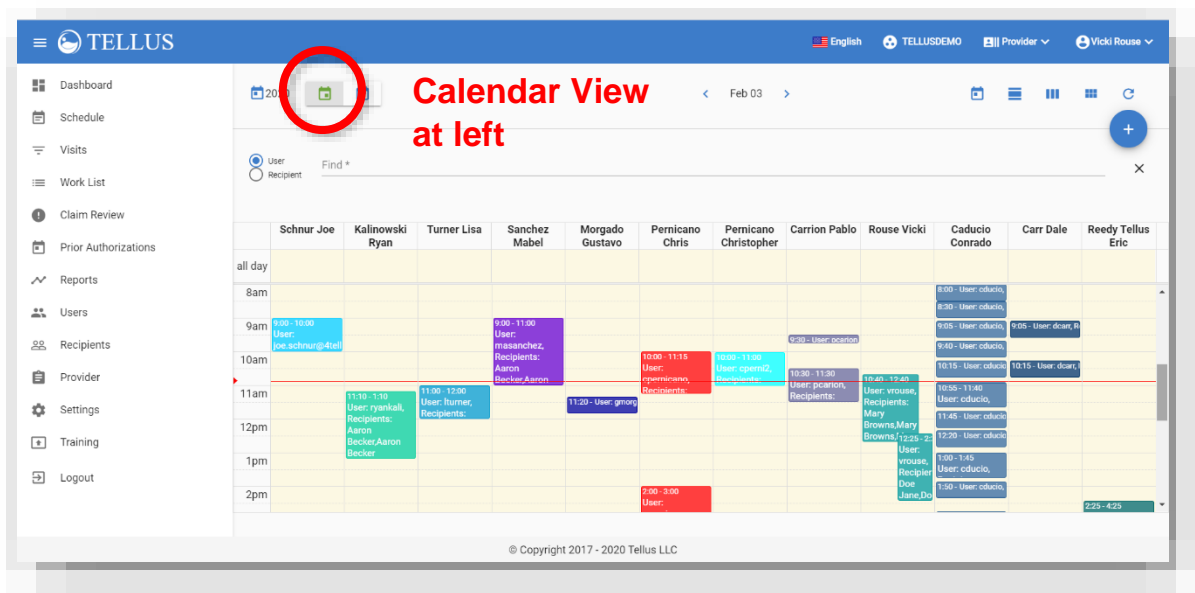
- **Name:** If **User** is selected at the top of the screen Caregiver names display in this column; if **Recipient** is selected the Recipient names display here.
- **Total Visits:** The total number of scheduled visits for the selected calendar period for each User or Recipient.
- **Dates:** The days and calendar dates within the selected calendar period.
- **Time:** The time the visit will start; a colored band indicates how long the visit is scheduled for.

You can use the buttons at the top of the page to change the time period or view. See [General Navigation for Scheduler or Calendar View](#).

Calendar View: Overview

You are here: [Tellus EVV Administrator User Guide](#) > [Scheduling](#) > [Viewing the Schedule](#) > Calendar View: Overview

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



The **Calendar view** shows all scheduled visits within a calendar period for Users or Recipients. The **Calendar view** displays:

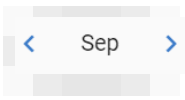



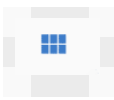

- The calendar day or week and dates appears at the top of the screen.
- The User(s) and Recipient(s) names for each scheduled visit appear on the day the visit is scheduled and at the time it is scheduled.
- The day and date appear as column headings across the top of the schedule; times are in the far-left column.

You can use the buttons at the top of the page to change the time period or view. See [General Navigation for Scheduler or Calendar View](#).

General Navigation for Scheduler or Calendar View

You are here: [Tellus EVV Administrator User Guide](#) > [Scheduling](#) > [Viewing the Schedule](#) > General Navigation

Buttons at the top of the page allow you to choose how the schedule displays and the time period for which you want to see visits.

| Button | Description |
|---|--|
|  | <p>Allows you to move backward and forward between months, weeks, or days Depending on the time interval selected. If you have Month selected, only the month will display; if you have Week selected, the date range for the week will display; if you have Today or Day selected, a month and day will display – Sep 9, for example. Use the arrows to move backward and forward between months, weeks, or days.</p> |
|  | <p>Displays the schedule for Today. The month displayed at the top of the screen changes to the date.</p> |
|  | <p>Displays the schedule for a specific day. The month displayed at the top of the screen changes to the date.</p> |
|  | <p>Displays the schedule for a specific Week.</p> |
|  | <p>Displays the schedule for a specific Month.</p> |
|  | <p>Reloads the page with the most recent schedule data.</p> |

| Button | Description |
|-------------------------|---|
| <i>Users/Recipients</i> | You can filter results by clicking the Find Users * or Find Recipients * field in the filter dialog. Filter by Users (Caregivers) and Recipients selecting a radio button. Then, 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.



Related Topic

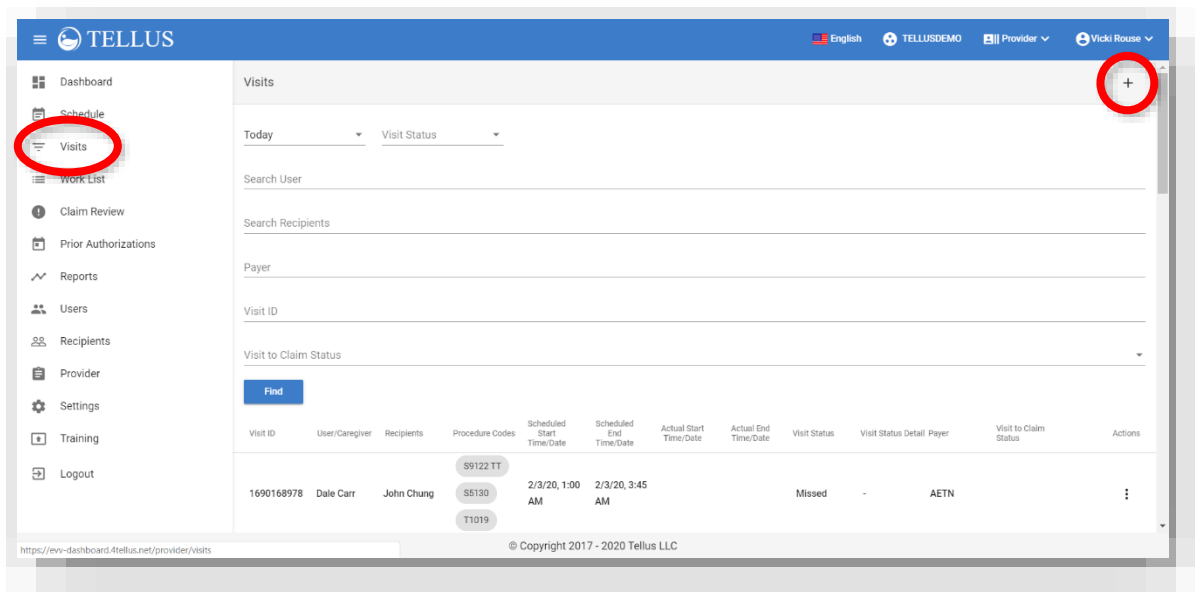
- [Adding or Scheduling a Visit](#)

Adding or Scheduling a Visit

You are here: [Tellus EVV Administrator User Guide](#) > [Scheduling](#) > Adding or Scheduling a Visit

You can add or schedule a visit using the Visit or Schedule option. The process for both is the same. To add a visit:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Visits** option or the **Schedule** option.



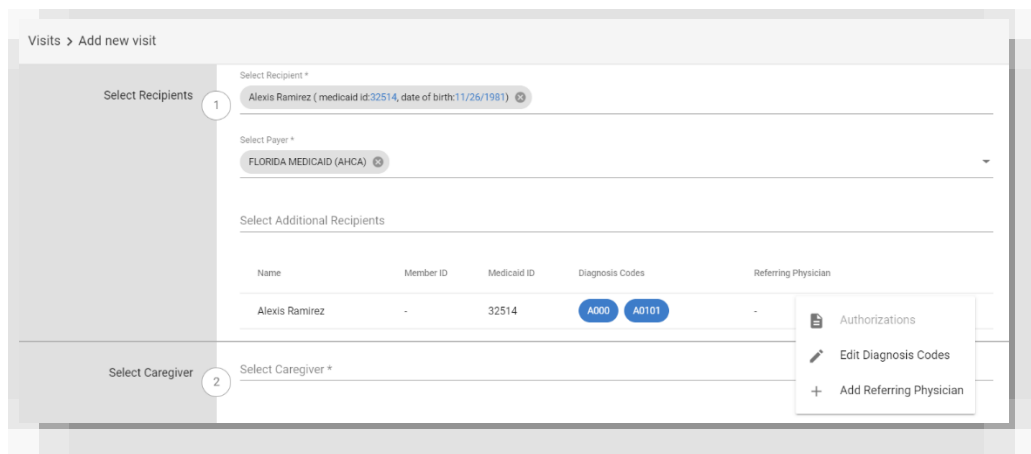
| Visit ID | User/Caregiver | Recipients | Procedure Codes | Scheduled Start Time/Date | Scheduled End Time/Date | Actual Start Time/Date | Actual End Time/Date | Visit Status | Visit Status Detail | Payer | Visit to Claim Status | Actions |
|------------|----------------|------------|----------------------------|---------------------------|-------------------------|------------------------|----------------------|--------------|---------------------|-------|-----------------------|---------|
| 1690168978 | Dale Carr | John Chung | S9122 TT S5130 T1019 | 2/3/20, 1:00 AM | 2/3/20, 3:45 AM | | | Missed | - | AETN | | |

3. Click the “add visit” icon (plus sign) at the top of the page.
4. When the **Add Visit** page opens, complete the information following the numbered steps on the screen. Instructions follow in [Adding a Visit: Entries](#).
5. Click **Save** when you finish making your entries.

Adding a Visit: Entries

You are here: [Tellus EVV Administrator User Guide](#) > [Scheduling](#) > [Adding or Scheduling a Visit](#) > Adding a Visit: Entries

Select Recipients



Visits > Add new visit

Select Recipients 1

Select Recipient *

Alexis Ramirez (medicaid id:32514, date of birth:11/26/1981) x

Select Payer *

FLORIDA MEDICAID (AHCA) x

Select Additional Recipients

| Name | Member ID | Medicaid ID | Diagnosis Codes | Referring Physician |
|----------------|-----------|-------------|-----------------|---------------------|
| Alexis Ramirez | - | 32514 | A000 A0101 | - |

Select Caregiver 2

Select Caregiver *

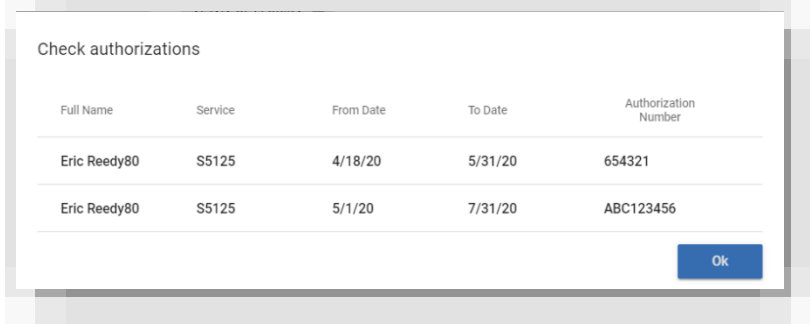
- Authorizations
- Edit Diagnosis Codes
- + Add Referring Physician

1. Make the following entries and selections:

- **Select Recipient:** Use the dropdown list to select the person who will receive the service.
- **Select Payer:** This field populates automatically with the Payer associated with the Recipient. You can select additional Payers from the dropdown list or delete the existing Payer (click “x” next to the payer name) and select a new one.
- **Select Additional Recipients:** You can select additional Recipients, for example, if the visit is for siblings, a group of children or spouses that you are seeing at the same time.

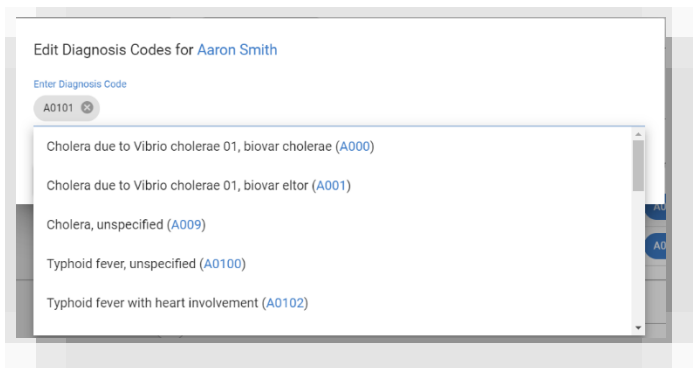
Note: Not all agencies are authorized to provide services to groups.

2. Click the submenu (vertical dots) and select **Authorizations** to check to see whether the service (diagnosis code) has been approved. The visit can be scheduled even if it is not. Click **OK** to close the window



3. Click the submenu (vertical dots) and select **Edit Diagnosis Codes** to add or change codes. Depending on your Payer and your program, diagnosis codes may not be required.

When you click the field to enter a code, a list of available codes displays; select the one you need. To delete a code, simply click the “x” next to it.



4. If your agency requires a Referring Physician, click the submenu (vertical dots) and then select **Add Referring Physician**. Click the field and make a selection from the dropdown list; then click **Save**.

Add Referring Physician for Alexis Ramirez

Current List of Referring physicians are related to TELLUSDEMO provider and this recipient

SAVE CANCEL

Select Caregiver

Select Caregiver 2

Select Services 3

Select Caregiver *

- PRODTESTGEORGIE PRODTESTPINK
- Madison Durand
- Gregoria Pinkley
- robert moser
- peter simmon

Click the **Select Caregiver** field to make a selection from the dropdown list.

Select Services

Select Services 3

- S5150 (Unskilled respite care /15m)
- S9123 (Nursing care in home rn)
- T1003 (Lpr/lvn services up to 15min)
- S9124 (Nursing care, in the home; b)
- T1021 (Hh aide or cn aide per visit)
 - Meal prep
- S5130 (Homaker service nos per 15m)
 - Laundry
 - light house keeping
 - Meal Assistance 2
 - Meal prep
 - companion
- T1030 (Rn home care per diem)

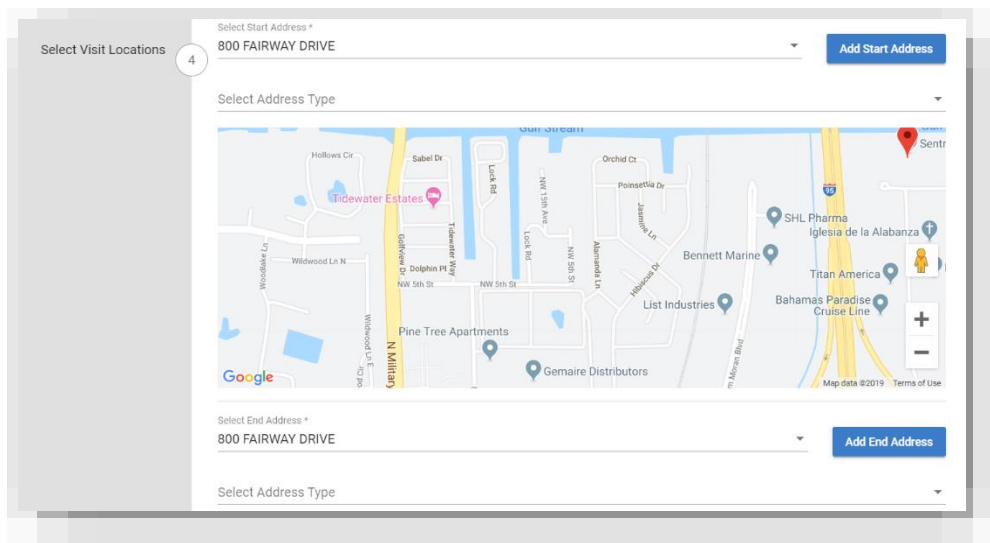
Select Modifiers

1. Services associated with the diagnosis code display here. Check the ones required for this visit.

If a service has multiple tasks, they are all checked when you check the service. You can uncheck any tasks that are not needed for this visit.

2. Select a modifier, if needed.

Select Visit Locations



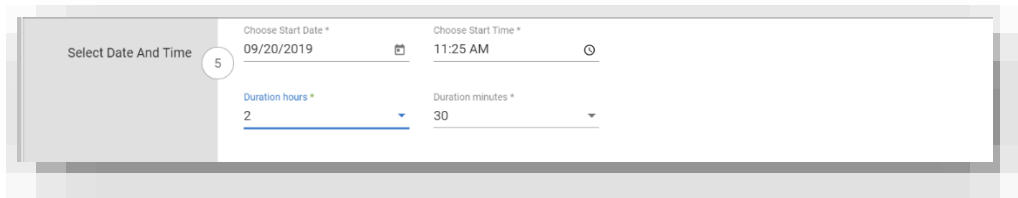
1. **Select Start Address** and **Select End Address**: Both fields are populated by the Recipient's [primary address](#).

If either address is different, click **Add Start Address** or **Add End Address** make a new entry.

*Note: If you make an **Add Start Address** or **Add End Address** entry, it will not be saved in the Recipient record. To add an address, see [Entering a Recipient Address](#).*

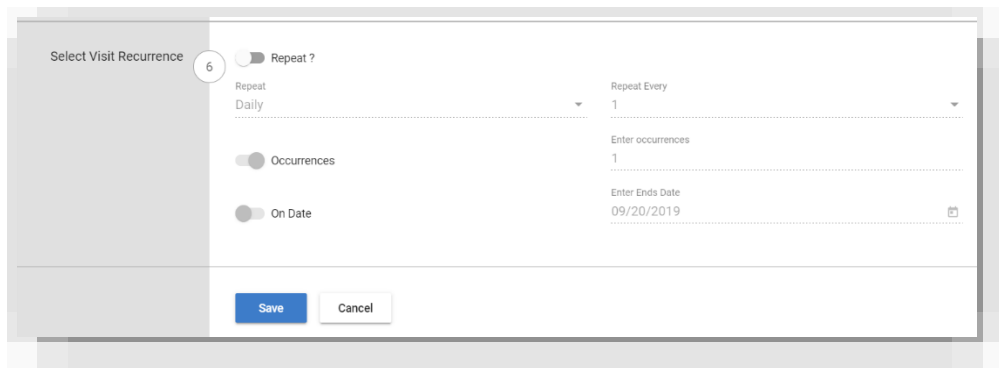
2. (OPTIONAL) **Select Address Type**: Use the dropdown list to select an address type, such as residence. This simply helps the Caregiver identify the location.

Select Date and Time



1. **Choose Start Date** defaults to today's date. Make a new selection by clicking the [calendar icon](#) to the right of the field.
2. **Choose Start Time** defaults to the time when you began creating the visit. Make a new selection by clicking the [clock icon](#) to the right of the field.
3. **Duration hours** allows you to select the number of hours the service requires from the dropdown list. If the service requires less than an hour, make a selection in the **Duration minutes** field only.
4. **Duration minutes** allows you to select the number of minutes the service requires from the dropdown list.

Select Visit Recurrence



1. **Repeat?** If this will be a recurring visit, click the Repeat slider to slide it to the right (on). Additional fields will be activated.
2. **Repeat:** Use the dropdown list to select the interval at which the visit will repeat, such as daily or weekly.
3. **Repeat Every:** Use the dropdown list to select the number of visits. For example, if you selected 'week' above and select 2 in this field, the visit will be scheduled every two weeks.
4. **Occurrences:** This field toggles on by default and you will enter the number of visits that should be scheduled below.

- **Enter Occurrence:** If this is a repeating visit, enter the total number of visits allowed.
- **On Date:** If the visits should repeat until a certain date, click this slider to move it to the right (on position). **Occurrences** is automatically turned off.
- **Enter Ends Date:** Enter the date of the last visit.

*Note: You must choose either **Occurrences** or **On Date**; you cannot choose both.*

*Note: Be sure to click **Save** when your entries are complete.*

Related Topic

- [Viewing the Schedule](#)

Managing Users

You are here: [Tellus EVV Administrator User Guide](#) > Managing Users

Click a topic below:

[Viewing Users](#)

[Changing the Number of Users Displayed per Page](#)

[Searching for a Specific User](#)

[Viewing User Detail](#)

[Adding a New User](#)

[Inviting an Existing User to your Agency](#)

[Importing a Group of New Users](#)

[Completing the New User Spreadsheet](#)

[Importing the New User Spreadsheet](#)

[Sending a Message to a User](#)

[Resetting User Passwords](#)

[Unlinking and Removing Users from Tellus EVV and Reassigning Tasks](#)

[Updating User Detail](#)

[Editing User Roles](#)

Viewing Users

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > Viewing Users

In this topic you will find instructions for:

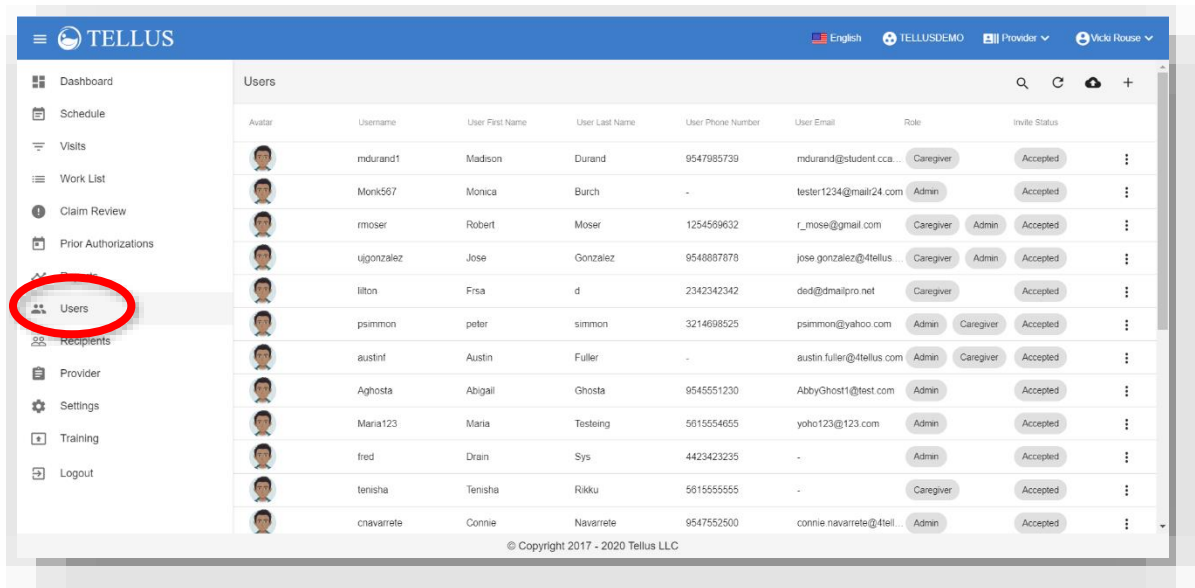
- [Viewing Users](#)
- [Changing the Number of Users Displayed per Page](#)
- [Searching for a Specific User](#)

Viewing Users

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > [Viewing Users](#) > Viewing Users

To view users:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Users** option to see the Users page.



| Avatar | Username | User First Name | User Last Name | User Phone Number | User Email | Role | Invite Status |
|--------|------------|-----------------|----------------|-------------------|---------------------------|-----------------|---------------|
| | mdurand1 | Madson | Durand | 9547985739 | mdurand@student.cca... | Caregiver | Accepted |
| | Monk567 | Monica | Burch | - | tester1234@mail24.com | Admin | Accepted |
| | rmoser | Robert | Moser | 1254559632 | r_mose@gmail.com | Caregiver Admin | Accepted |
| | ujgonzalez | Jose | Gonzalez | 9548887878 | jose.gonzalez@4tellus | Caregiver Admin | Accepted |
| | litton | Frisa | d | 2342342342 | ded@dmaipro.net | Caregiver | Accepted |
| | psimmon | peter | simmon | 3214698525 | psimmon@yahoo.com | Admin Caregiver | Accepted |
| | austinf | Austin | Fuller | - | austin.fuller@4tellus.com | Admin Caregiver | Accepted |
| | Aghosta | Abigail | Ghosta | 9545551230 | AbbyGhost1@test.com | Admin | Accepted |
| | Maria123 | Maria | Testeing | 5615554655 | yoho123@123.com | Admin | Accepted |
| | fred | Drain | Sys | 4423423235 | - | Admin | Accepted |
| | terisha | Tenisha | Rikku | 5615555555 | - | Caregiver | Accepted |
| | cnavarrete | Connie | Navarrete | 9547552500 | connie.navarrete@4tell | Admin | Accepted |

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

- Profile picture
- **First name**
- **Last name**
- **Phone**
- **Email**
- **Role**
- **Invite Status**
- A submenu (vertical dots) that offers several options:
 - o [Send message to User.](#)
 - o [Reset User password.](#)
 - o [Unlink User](#) (delete User and reassign their tasks)

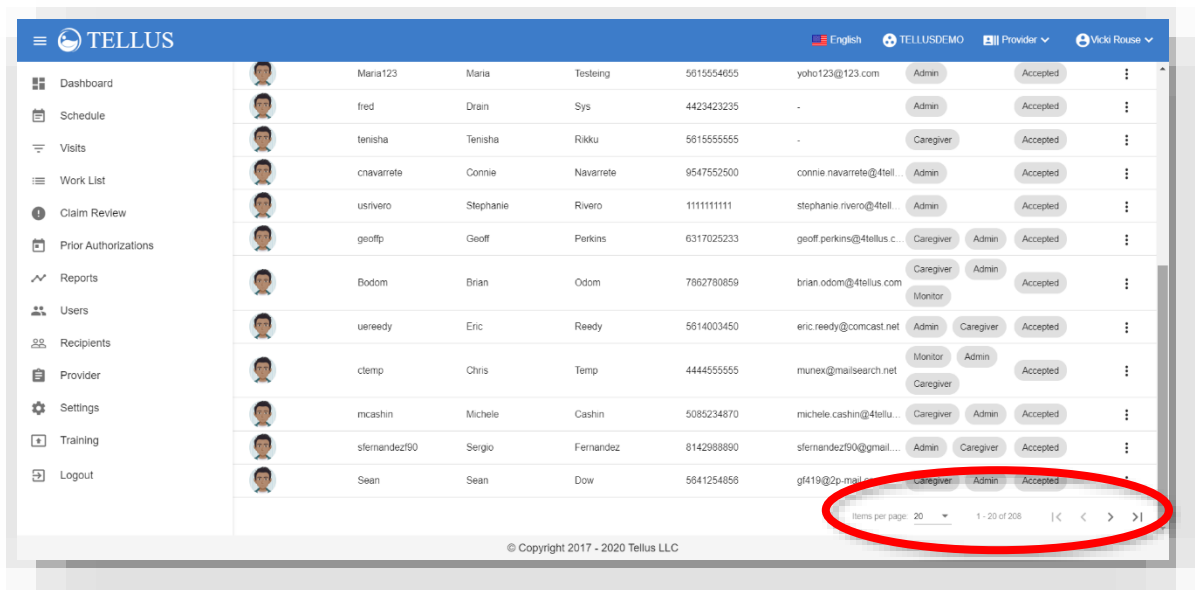
- Details ([view](#) or [update](#) User details)
- [Edit User Roles](#)

Changing the Number of Users Displayed per Page

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > [Viewing Users](#) > Changing the Number of Users Displayed per Page

To change the number of Users that appear on each page:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Users** option to see the Users page.
3. Scroll to the bottom of the page.
4. Click the **Items per page** dropdown arrow and make a selection: 20, 50, 100 or 200 Users per page. The Users as well as the counter at the bottom of your screen are updated to reflect the range of records presented (for example, 1-20 of 74 records).



| Profile | First Name | Last Name | Phone | Email | Role | Status | More |
|---------|--------------|-----------|------------|----------------------------|-----------------|----------|------|
| | Maria | Testeing | 5015554655 | yoho123@123.com | Admin | Accepted | ⋮ |
| | fred | Drain | 4423423235 | - | Admin | Accepted | ⋮ |
| | tenisha | Rikku | 5015555555 | - | Caregiver | Accepted | ⋮ |
| | cnavarrete | Navarrete | 9547552500 | connie.navarrete@4tell... | Admin | Accepted | ⋮ |
| | usrivero | Rivero | 1111111111 | stephanie.rivero@4tell... | Admin | Accepted | ⋮ |
| | geoffp | Perkins | 6317025233 | geoff.perkins@4tellus.c... | Caregiver Admin | Accepted | ⋮ |
| | Bodom | Odom | 7862780859 | brian.odom@4tellus.com | Caregiver Admin | Accepted | ⋮ |
| | ureedy | Reedy | 5614003450 | eric.reedy@comcast.net | Admin Caregiver | Accepted | ⋮ |
| | ctemp | Temp | 4444555555 | munex@mailsearch.net | Monitor Admin | Accepted | ⋮ |
| | mcashin | Cashin | 5085234870 | michele.cashin@4tellu... | Caregiver Admin | Accepted | ⋮ |
| | sfernandez90 | Fernandez | 8142988890 | sfernandez90@gmail... | Admin Caregiver | Accepted | ⋮ |
| | Sean | Dow | 5841254856 | gf419@2p-mail... | Caregiver Admin | Accepted | ⋮ |

Items per page: 20 | 1 - 20 of 208 | < > >>

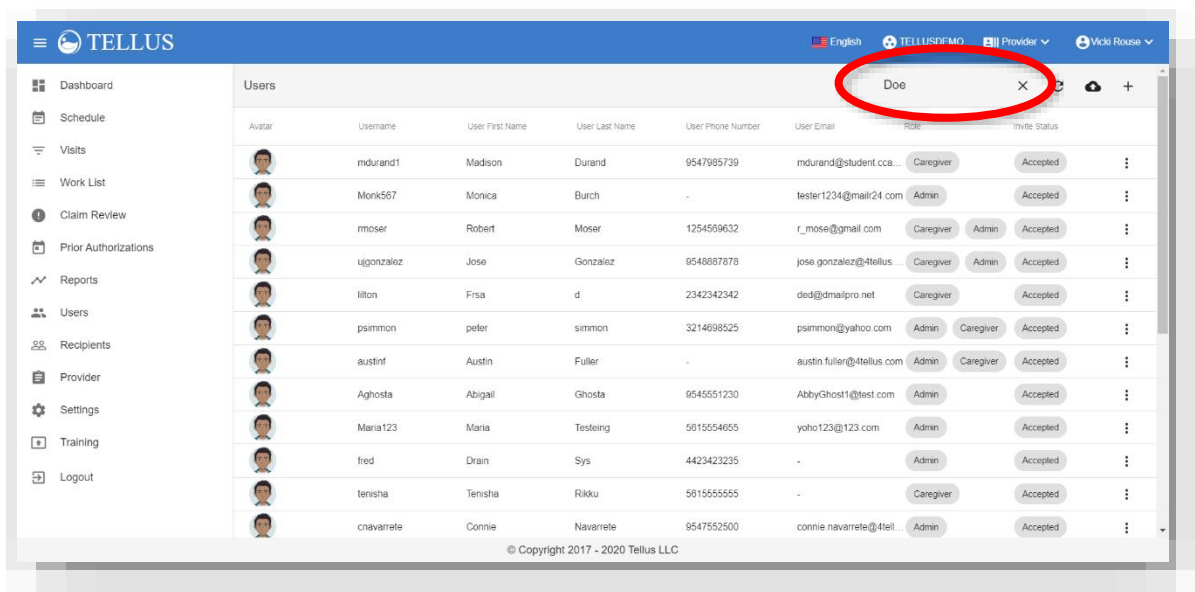
5. If the number of Users exceeds the space available on your screen, scroll to the bottom of the list. You can then click the left and right arrows at the bottom of the page to view additional Users.

Searching for a Specific User

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > [Viewing Users](#) > Searching for a Specific User

To search for a specific User:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Users** option to see the Users page.
3. Click the magnifying glass icon.
4. Enter all or part of a Username, first or last name, or all or part of an email address in the **Search User** field that displays and press Enter.



The screenshot shows the Tellus EVV Administrator User Guide interface. The top navigation bar includes the Tellus logo, language settings (English), user profile (TELLUSDFMO), provider selection, and user name (Vicki Rouse). A left sidebar contains a main menu with options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area is titled 'Users' and features a search bar with the text 'Doe' entered. Below the search bar is a table of users with columns for Avatar, Username, User First Name, User Last Name, User Phone Number, User Email, Role, and Invite Status. The table lists several users, including mdurand1, Monik567, rmoser, ugonzalez, lilton, psimmon, austint, Aghosta, Maria123, fred, tenisha, and cnavarrete. The search bar is highlighted with a red circle.

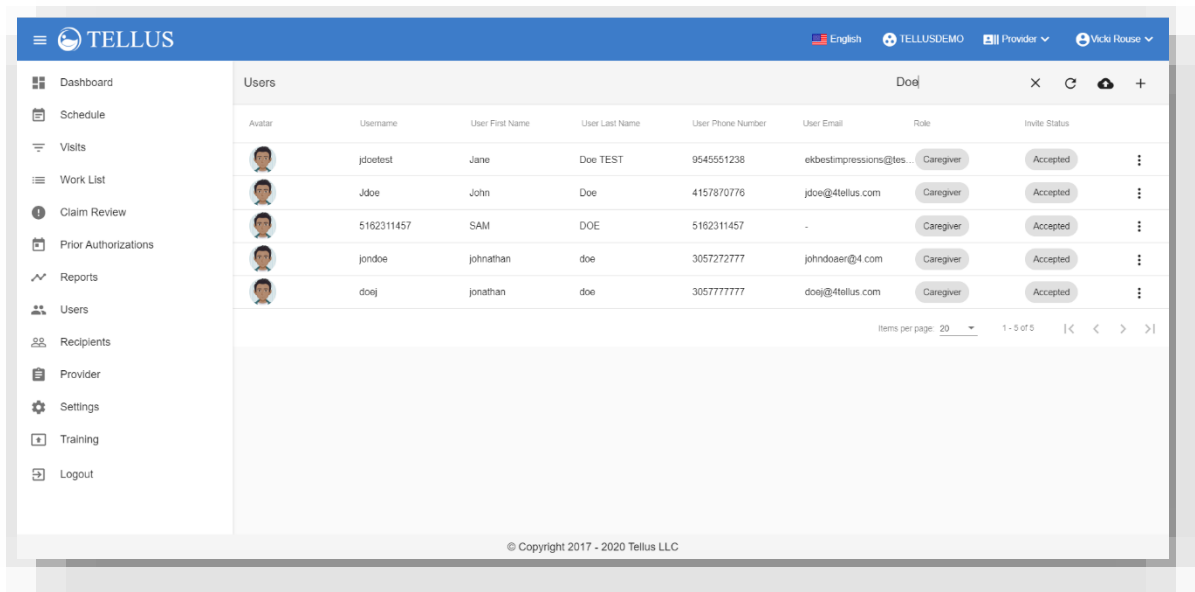
| Avatar | Username | User First Name | User Last Name | User Phone Number | User Email | Role | Invite Status |
|--------|------------|-----------------|----------------|-------------------|---------------------------|-----------------|---------------|
| | mdurand1 | Madison | Durand | 9547985739 | mdurand@student.cca... | Caregiver | Accepted |
| | Monik567 | Monica | Burch | - | tester1234@mail24.com | Admin | Accepted |
| | rmoser | Robert | Moser | 1254509632 | r_mose@gmail.com | Caregiver Admin | Accepted |
| | ugonzalez | Jose | Gonzalez | 9548887878 | jose.gonzalez@4tellus | Caregiver Admin | Accepted |
| | lilton | Frisa | d | 2342342342 | ded@dmalpro.net | Caregiver | Accepted |
| | psimmon | peter | simmon | 3214698525 | psimmon@yahoo.com | Admin Caregiver | Accepted |
| | austint | Austin | Fuller | - | austin.fuller@4tellus.com | Admin Caregiver | Accepted |
| | Aghosta | Abigail | Ghosta | 9545551230 | AbbyGhost1@test.com | Admin | Accepted |
| | Maria123 | Maria | Testeing | 5015554655 | yoho123@123.com | Admin | Accepted |
| | fred | Drain | Sys | 4423423235 | - | Admin | Accepted |
| | tenisha | Tenisha | Rikku | 5015555555 | - | Caregiver | Accepted |
| | cnavarrete | Connie | Navarrete | 9547552500 | connie.navarrete@4tel... | Admin | Accepted |

5. You can sort the results by clicking the title of the column for **Username, User First Name, User Last Name, Phone Number, or Email**; click the same column title again to reverse the order.

Related Topics

- [Viewing User Detail](#)
- [Adding a New User](#)
- [Inviting an Existing User to your Agency](#)
- [Importing a Group of New Users](#)
- [Sending a Message to a User](#)
- [Resetting User Passwords](#)
- [Updating User Detail](#)
- [Editing User Roles](#)
- [Unlinking and Removing Users from Tellus EVV and Reassigning Tasks](#)

All Users who have the search text in their profile as part of their Username, first name, last name, or email address will display. For example, the search text “doe” returns Users who have that string of characters in any of those fields in their profile.



6. Click “X” to clear the search field and view all Users.

Related Topics:

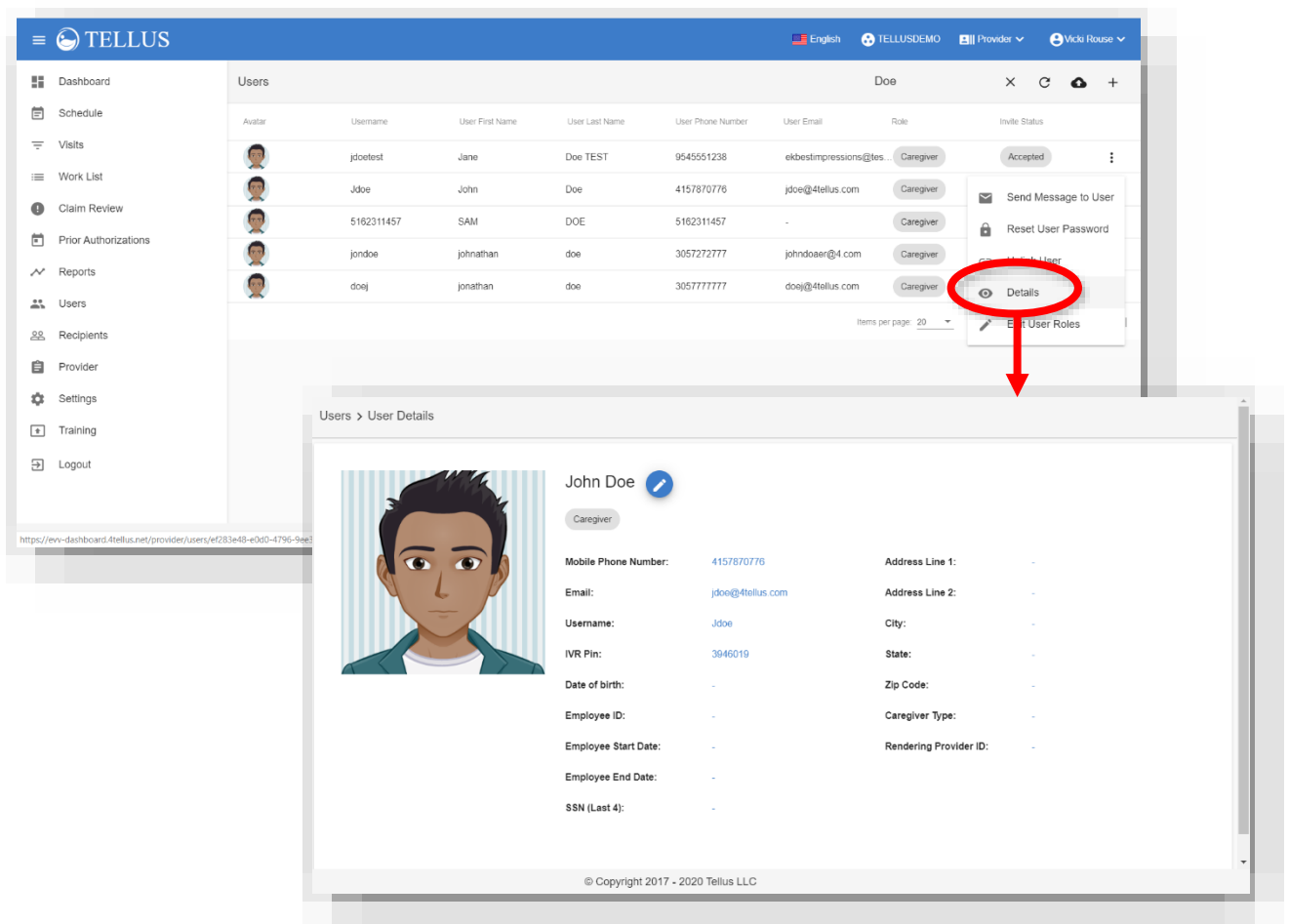
- [Adding a New User](#)
- [Inviting an Existing User to your Agency](#)
- [Importing a Group of New Users](#)
- [Sending a Message to a User](#)
- [Resetting User Passwords](#)
- [Unlinking and Removing Users from Tellus EVV and Reassigning Tasks](#)
- [Updating User Detail](#)
- [Editing User Roles](#)

Viewing User Detail

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > [Viewing Users](#) > Searching for a User

To view detail for a specific User:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Users** option to see the Users page.
3. [Find the User](#) whose detail you want to see.
4. Click the submenu (vertical dots).
5. Select **Details**.



The screenshot displays the Tellus EVV Administrator interface. The top navigation bar includes the Tellus logo, language settings (English), user information (TELLUSDEMO, Provider, Vicki Rouse), and a search bar. The left sidebar contains a main menu with options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area shows a table of users with columns for Avatar, Username, User First Name, User Last Name, User Phone Number, User Email, Role, and Invite Status. A red circle highlights the 'Details' option in the submenu for the user John Doe. Below the table, the 'User Details' page for John Doe is shown, displaying his profile picture, role (Caregiver), and various fields such as Mobile Phone Number, Email, Username, IVR Pin, Date of birth, Employee ID, Employee Start Date, Employee End Date, SSN (Last 4), Address Line 1, Address Line 2, City, State, Zip Code, Caregiver Type, and Rendering Provider ID.

| Avatar | Username | User First Name | User Last Name | User Phone Number | User Email | Role | Invite Status |
|--------|------------|-----------------|----------------|-------------------|--------------------------|-----------|---------------|
| | jdoetest | Jane | Doe TEST | 9545551238 | ekbestimpressions@tes... | Caregiver | Accepted |
| | Jdoe | John | Doe | 4157870776 | jdoe@4tellus.com | Caregiver | |
| | 5182311457 | SAM | DOE | 5162311457 | - | Caregiver | |
| | jondoe | johnathan | doe | 3057272777 | johndoer@4.com | Caregiver | |
| | doej | jonathan | doe | 3057777777 | doej@4tellus.com | Caregiver | |

User Details for John Doe:

- Name:** John Doe
- Role:** Caregiver
- Mobile Phone Number:** 4157870776
- Email:** jdoe@4tellus.com
- Username:** Jdoe
- IVR Pin:** 3946019
- Date of birth:** -
- Employee ID:** -
- Employee Start Date:** -
- Employee End Date:** -
- SSN (Last 4):** -
- Address Line 1:** -
- Address Line 2:** -
- City:** -
- State:** -
- Zip Code:** -
- Caregiver Type:** -
- Rendering Provider ID:** -

Related Topics:

- [Viewing Users](#)
- [Adding a New User](#)
- [Inviting an Existing User to your Agency](#)
- [Importing a Group of New Users](#)
- [Sending a Message to a User](#)
- [Resetting User Passwords](#)
- [Unlinking and Removing Users from Tellus EVV and Reassigning Tasks](#)
- [Updating User Detail](#)
- [Editing User Roles](#)

Adding a New User

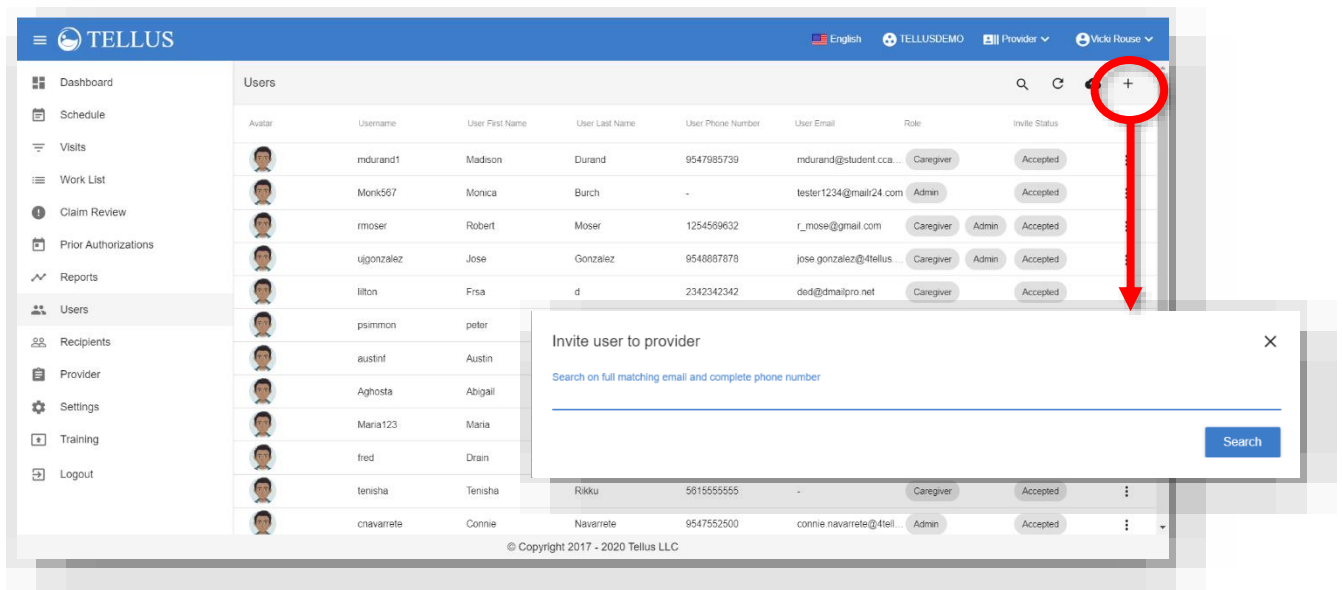
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > Adding a New User

Note: Users can self-register using the mobile app. If they have self-registered, you can [invite them to your agency](#); if they have not you can add them following the instructions below.

When you add a User to Tellus EVV, you are “inviting” them to join your provider agency. Users can be administrators, Caregivers, or Users who have view only privileges (they should be able to view but not edit information using the Administrator Console). There are two ways to add Users: you can add individual Users, or you can [import a group of Users](#).

To add an individual new User, follow the steps below.

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Users** option to see the Users page.
3. Click the “Add User” icon (plus sign) in the upper right corner of the screen to open the Invite user to provider dialog box.



The screenshot shows the Tellus EVV Administrator interface. The top navigation bar includes the Tellus logo, language settings (English), a demo account (TELLUSDEMO), and user information (Provider, Vicki Rouse). The left sidebar contains a main menu with options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area displays a table of users with columns for Avatar, Username, User First Name, User Last Name, User Phone Number, User Email, Role, and Invite Status. A red circle highlights a plus sign icon in the top right corner of the table area. A red arrow points from this icon to a dialog box titled "Invite user to provider". The dialog box contains a search field with the placeholder text "Search on full matching email and complete phone number" and a blue "Search" button.

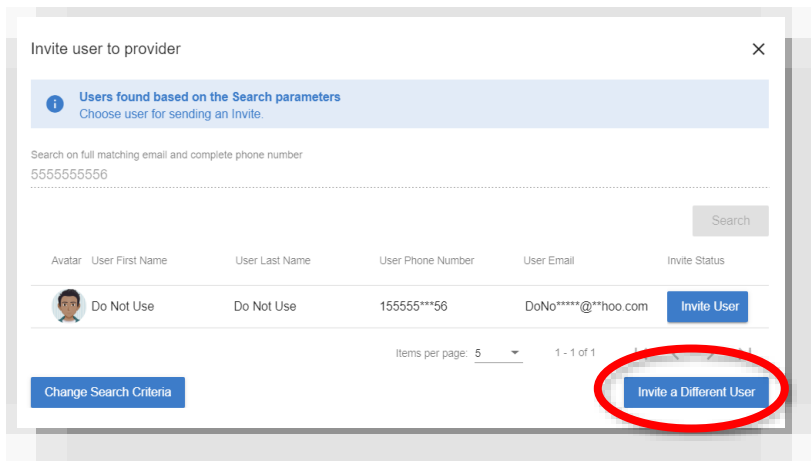
| Avatar | Username | User First Name | User Last Name | User Phone Number | User Email | Role | Invite Status |
|--------|------------|-----------------|----------------|-------------------|------------------------|-----------------|---------------|
| | mdurand1 | Madison | Durand | 9547985739 | mdurand@student.cca... | Caregiver | Accepted |
| | Monk567 | Monica | Burch | - | lester1234@mail24.com | Admin | Accepted |
| | rmoser | Robert | Moser | 1254559632 | r_mose@gmail.com | Caregiver Admin | Accepted |
| | ujgonzalez | Jose | Gonzalez | 9546887878 | jose.gonzalez@4tellus | Caregiver Admin | Accepted |
| | lilton | Frisa | d | 2342342342 | dod@dmalpro.net | Caregiver | Accepted |
| | psimmon | peter | | | | | |
| | austin | Austin | | | | | |
| | Aghosta | Abigail | | | | | |
| | Maria123 | Maria | | | | | |
| | fred | Drain | | | | | |
| | tenisha | Tenisha | | | | | |
| | cnavarrete | Connie | Navarrete | 9547552500 | connie.navarrete@4tell | Admin | Accepted |

4. You must search for an existing User, even if you know the User is not in the system, and invite them to join your organization. To do so enter a User email address or phone number.

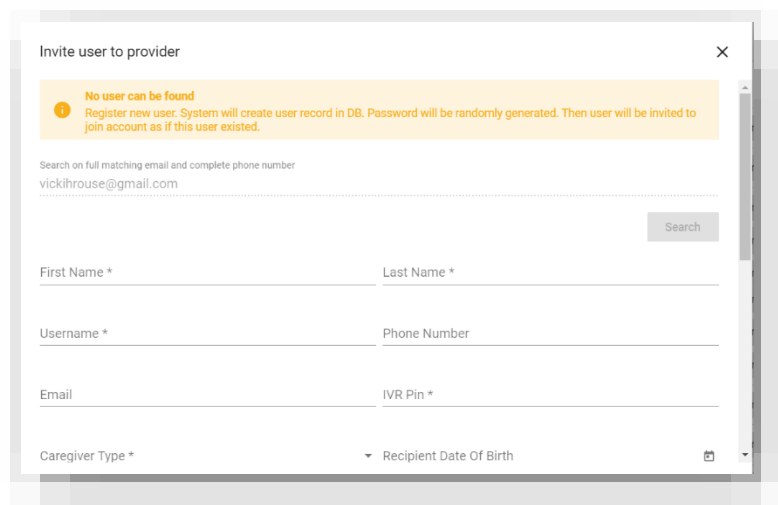
5. Click **Search**.

If the User already exists in the system, the list of Users who match the email address or phone number you entered will appear on the screen.

Note: Do not create a duplicate account for the User if it already exists in the system. See [Inviting an Existing User to your Agency](#) to learn how.



6. If the User does not exist in the system, click **Invite a Different User** to open the Invite User to Provider page where you can enter User details.



7. Make the following required entries:

- **First name:** Enter the new User's first name.
- **Last name:** Enter the new User's last name.

- **Username:** Enter the new User's preferred Username. This is Username that will be used to log into Tellus EVV.
 - **Mobile Phone Number** (required if you do not enter an **Email** address): Enter the new User's phone number. This can also be used for notification and password reset purposes. Only numeric characters can be entered; i.e., 0-9. It is not necessary to add parentheses or hyphens; the phone number is formatted automatically as numbers are entered.
 - **Email** (required if you do not enter **Mobile Phone Number**): Enter the new User's valid email address. This can be used for notification and password reset purposes.
 - **Caregiver Type:** If you are setting up a Caregiver, select the type of Caregiver they are. Use the dropdown list to see available types; you can select only one.
 - **Rendering Provider ID:** If you are setting up a Caregiver, enter the 9-digit Medicaid ID for the Caregiver. You must enter a Rendering Provider ID or you will need to enter it for every visit you schedule for this Caregiver.
 - **Roles:** Use the dropdown list to see available roles and then check one or more of the following:
 - **Admin** — This role allows the User to view and edit information in the Administrator Console. There is no need to select any other role; Administrators have access to everything in the system.
 - **Billing** — This role allows the User to access Claims functions only: Visits, Work List, Claim Review, and Prior Authorizations. This role can be combined with any other role, except Monitor.
 - **Caregiver** — This role allows the User to view only the information and schedules for the Recipients for whom they provide care. If a User is assigned the Caregiver *only*, that User will only have access to information on their EVV mobile app; they will not have access to the Administrator Console.
 - **Monitor** — This role allows the User to only view information. Users assigned the Monitor role cannot make any changes using the Administrator Console. This role can be combined with Caregiver only.
8. Complete other fields if you know the information; you can always come back and [Edit User Details](#).
9. Click **Invite New User** to add the new User.

The User information will be saved, and you will return to the **Users** page.

An email will be sent to the User to join Tellus EVV system. The user will have 36

hours to activate the invite before expiring.

If you do not want to add the User at this time, click **Cancel** to return to the **Users** page. The new User information will not be saved.

Related Topics:

- [Viewing Users](#)
- [Viewing User Detail](#)
- [Inviting an Existing User to your Agency](#)
- [Importing a Group of New Users](#)
- [Sending a Message to a User](#)
- [Resetting User Passwords](#)
- [Unlinking and Removing Users from Tellus EVV and Reassigning Tasks](#)
- [Updating User Detail](#)
- [Editing User Roles](#)

Inviting an Existing User to your Agency

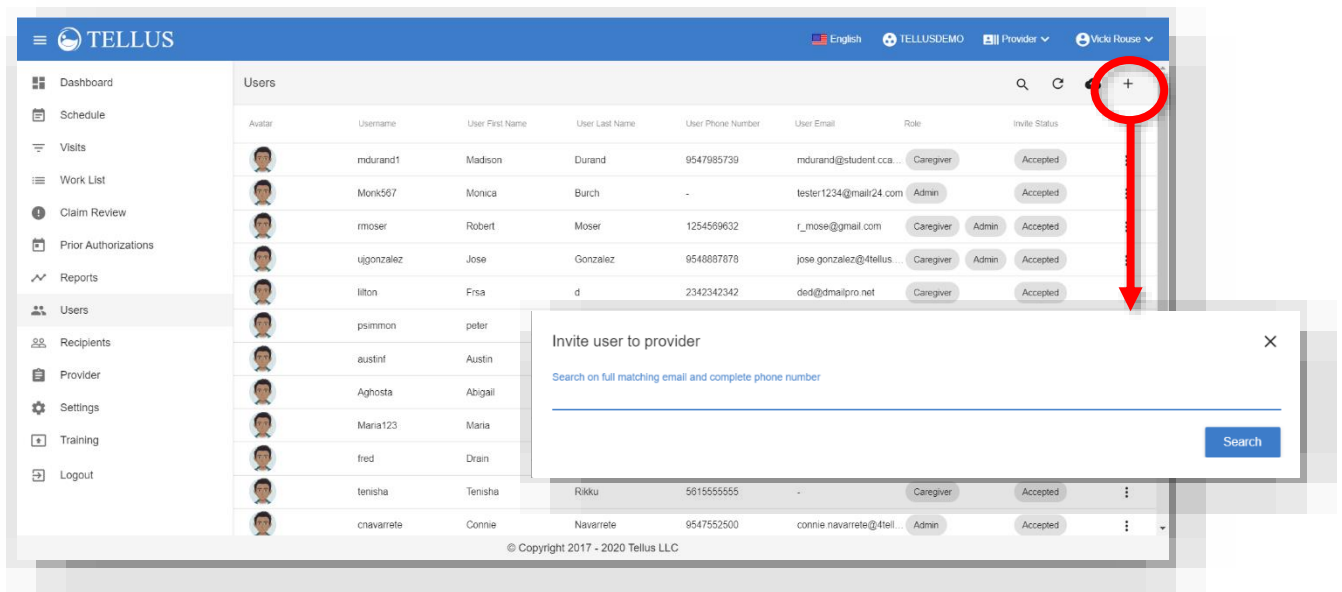
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > Inviting an Existing User to your Agency

Note: Users can self-register using the mobile app. If they have not you can add them following the instructions below.

If a user works for more than one agency and that User already exists in Tellus EVV, you can “invite” them to join your agency.

To invite an existing User to your agency, follow the steps below.

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Users** option to see the Users page.
3. Click the “Add User” icon (+) in the upper right corner of the screen to open the Invite user to provider dialog box.



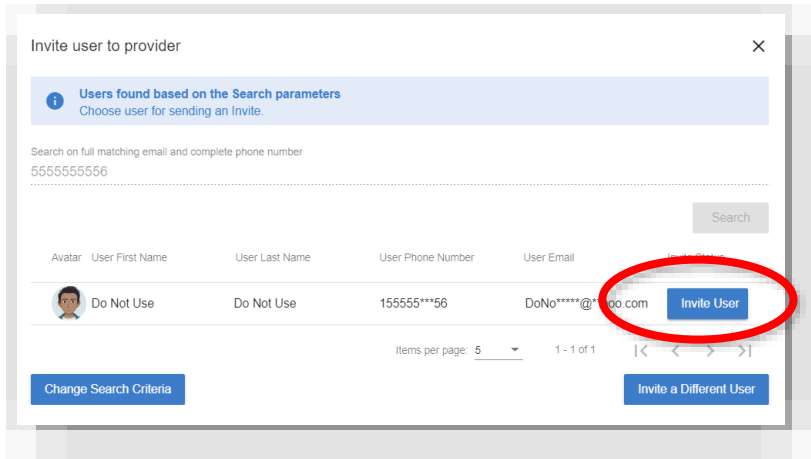
The screenshot shows the Tellus EVV Administrator interface. The top navigation bar includes the Tellus logo, language settings (English), a demo account (TELLUSDEMO), and user information (Vicki Rouse). The left sidebar contains a main menu with options like Dashboard, Schedule, Visits, Work List, Claim Review, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area displays a table of users with columns for Avatar, Username, User First Name, User Last Name, User Phone Number, User Email, Role, and Invite Status. A red circle highlights the '+' icon in the top right corner of the Users table, and a red arrow points from it to the 'Invite user to provider' dialog box. The dialog box contains a search field with the placeholder text 'Search on full matching email and complete phone number' and a 'Search' button. Below the search field, a list of users is shown, including Rikku, Navarrete, and Connie, with their respective roles and invite statuses.

| Avatar | Username | User First Name | User Last Name | User Phone Number | User Email | Role | Invite Status |
|--------|------------|-----------------|----------------|-------------------|--------------------------|-----------------|---------------|
| | mdurand1 | Madison | Durand | 9547985739 | mdurand@student.cca... | Caregiver | Accepted |
| | Monik567 | Monica | Burch | - | lester1234@mailr24.com | Admin | Accepted |
| | rmoser | Robert | Moser | 1254599632 | r_mose@gmail.com | Caregiver Admin | Accepted |
| | ujgonzalez | Jose | Gonzalez | 9546887878 | jose.gonzalez@4tellus... | Caregiver Admin | Accepted |
| | lilton | Frisa | d | 2342342342 | dod@dmalpro.net | Caregiver | Accepted |
| | psimmon | peter | | | | | |
| | ausfml | Austin | | | | | |
| | Aghosta | Abigail | | | | | |
| | Maria123 | Maria | | | | | |
| | fred | Drain | | | | | |
| | tenisha | Tenisha | | | | | |
| | cnavarrete | Connie | Navarrete | 9547552500 | connie.navarrete@4tel... | Admin | Accepted |

4. You must search for an existing User, even if you know the User is not in the system, and invite them to join your organization. To do so enter a User email address or phone number.
5. Click **Search**.

If the User already exists in the system, the list of Users who match the email address or phone number you entered will appear on the screen.

Note: Do not create a duplicate account for the User if it already exists in the system.



6. Click **Invite User**.

An email will be sent to the User to join your agency. The user will have 36 hours to accept the invitation before it expires.

Related Topics:

- [Viewing Users](#)
- [Viewing User Detail](#)
- [Adding a New User](#)
- [Importing a Group of New Users](#)
- [Sending a Message to a User](#)
- [Resetting User Passwords](#)
- [Unlinking and Removing Users from Tellus EVV and Reassigning Tasks](#)
- [Updating User Detail](#)
- [Editing User Roles](#)

Importing a Group of New Users

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > Importing a Group of New Users

When you received the email with your logon credentials during the onboarding process for Tellus EVV, you should have received the Tellus EVV User Upload Template spreadsheet and the Tellus EVV Users Upload Instructions. You can use the spreadsheet to import a group of Users into Tellus EVV. To do so you will [complete](#) and [import](#) the spreadsheet; instructions follow.

Completing the New User Spreadsheet

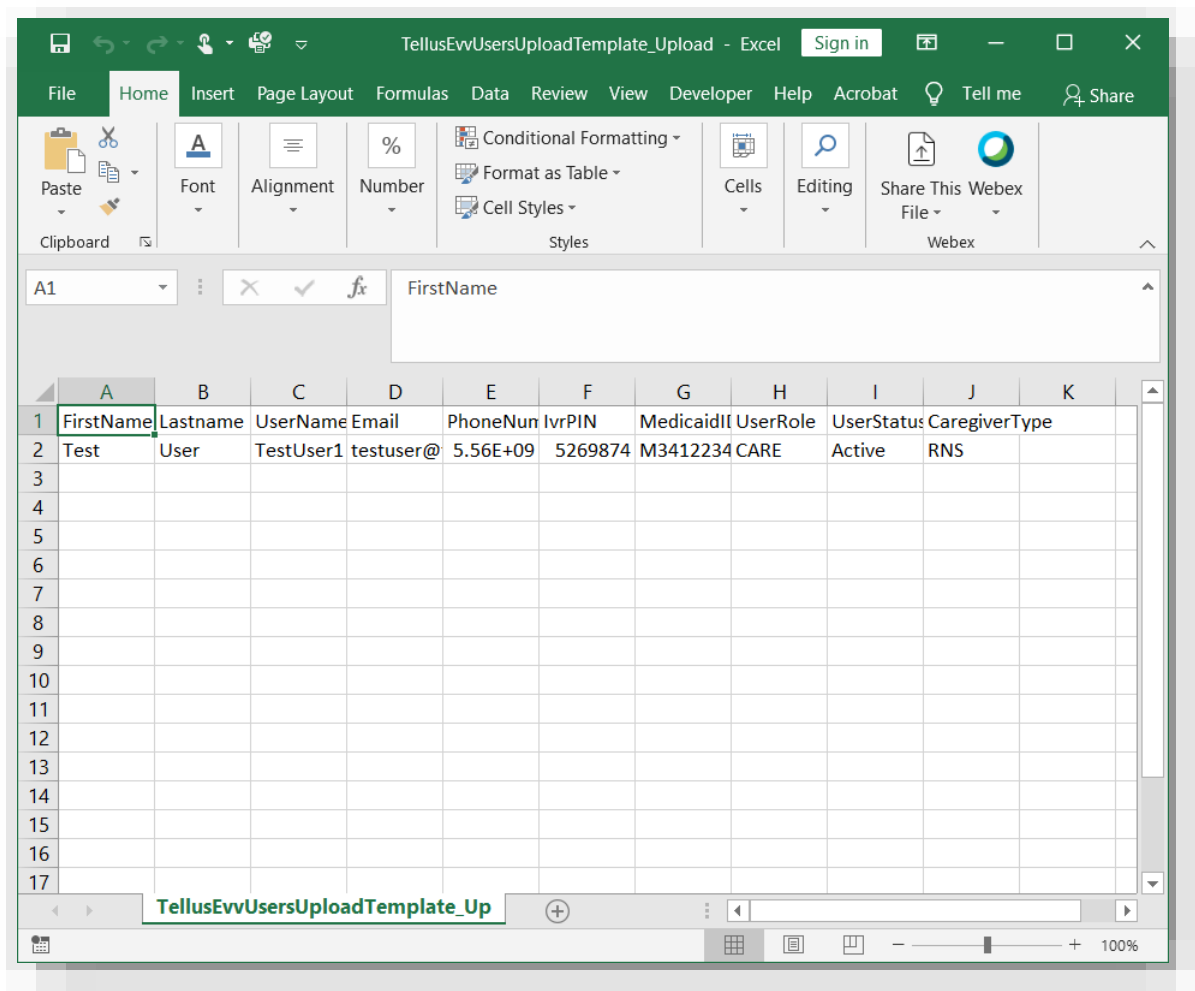
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > [Importing a Group of New Users](#)
> Completing the New User Spreadsheet

When you open the spreadsheet, you will see that Line 2 is an example of how your entries should look; delete the example or type over the example entries following the instructions in Tellus EVV Users Upload Instructions.

Note: Commas are never allowed, even in fields that allow special characters.

Note: When you save the spreadsheet, you may want to rename it so you keep the original template for future use.

Note: The spreadsheet is formatted as a .csv (comma separated values) file. Do not change the format when saving.



Importing the New User Spreadsheet

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > [Importing a Group of New Users](#) > Importing the New User Spreadsheet

To import the spreadsheet:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Users** option to see the **Users** page
3. Click the “cloud” icon in the upper right corner of the page.

TELLUS English TELLUSDEMO Provider Vicki Rouse

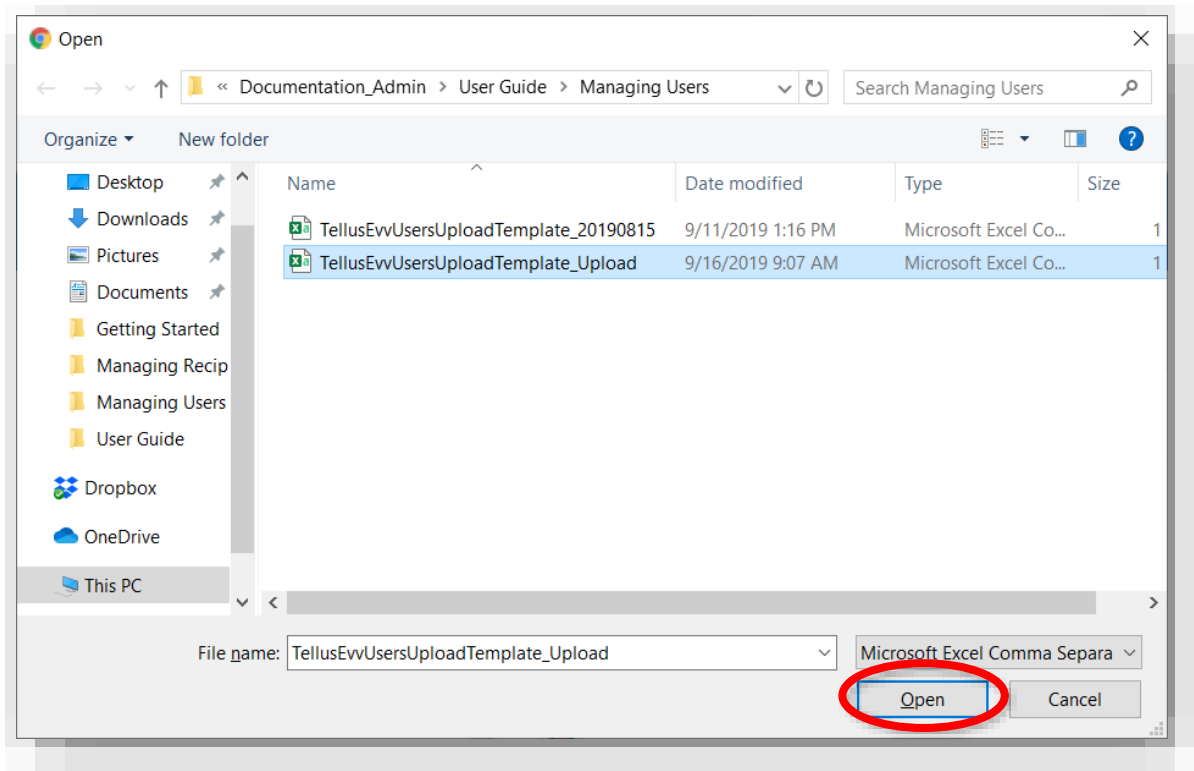
- Dashboard
- Schedule
- Visits
- Work List
- Claim Review
- Prior Authorizations
- Reports
- Users**
- Recipients
- Provider
- Settings
- Training
- Logout

Users

| Avatar | Username | User First Name | User Last Name | User Phone Number | User Email | Role | Invite Status | |
|--------|------------|-----------------|----------------|-------------------|---------------------------|-----------------|---------------|---|
| | mdurand1 | Madson | Durand | 9547985739 | mdurand@student.cca... | Caregiver | Accepted | ⋮ |
| | Monk567 | Monica | Burch | - | lester1234@mail24.com | Admin | Accepted | ⋮ |
| | rmoser | Robert | Moser | 1254559632 | r_mose@gmail.com | Caregiver Admin | Accepted | ⋮ |
| | ujgonzalez | Jose | Gonzalez | 9546887878 | jose.gonzalez@4tellus | Caregiver Admin | Accepted | ⋮ |
| | lilton | Frisa | d | 2342342342 | ded@dmalpro.net | Caregiver | Accepted | ⋮ |
| | psimmon | peter | simmon | 3214698525 | psimmon@yahoo.com | Admin Caregiver | Accepted | ⋮ |
| | austint | Austin | Fuller | - | austin.fuller@4tellus.com | Admin Caregiver | Accepted | ⋮ |
| | Aghosta | Abigail | Ghosta | 9545551230 | AbbyGh0st1@test.com | Admin | Accepted | ⋮ |
| | Maria123 | Maria | Testeing | 5615554655 | yoho123@123.com | Admin | Accepted | ⋮ |
| | fred | Drain | Sys | 4423423235 | - | Admin | Accepted | ⋮ |
| | tenisha | Tenisha | Rikku | 5615555555 | - | Caregiver | Accepted | ⋮ |
| | cnavarrete | Connie | Navarrete | 9547552500 | connie.navarrete@4teill | Admin | Accepted | ⋮ |

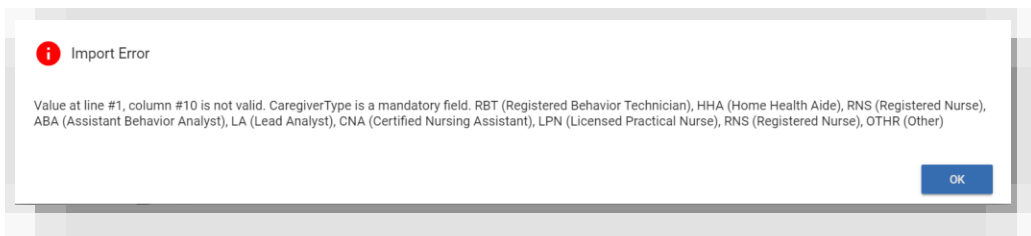
© Copyright 2017 - 2020 Tellus LLC

4. Find and select the file you want to upload.

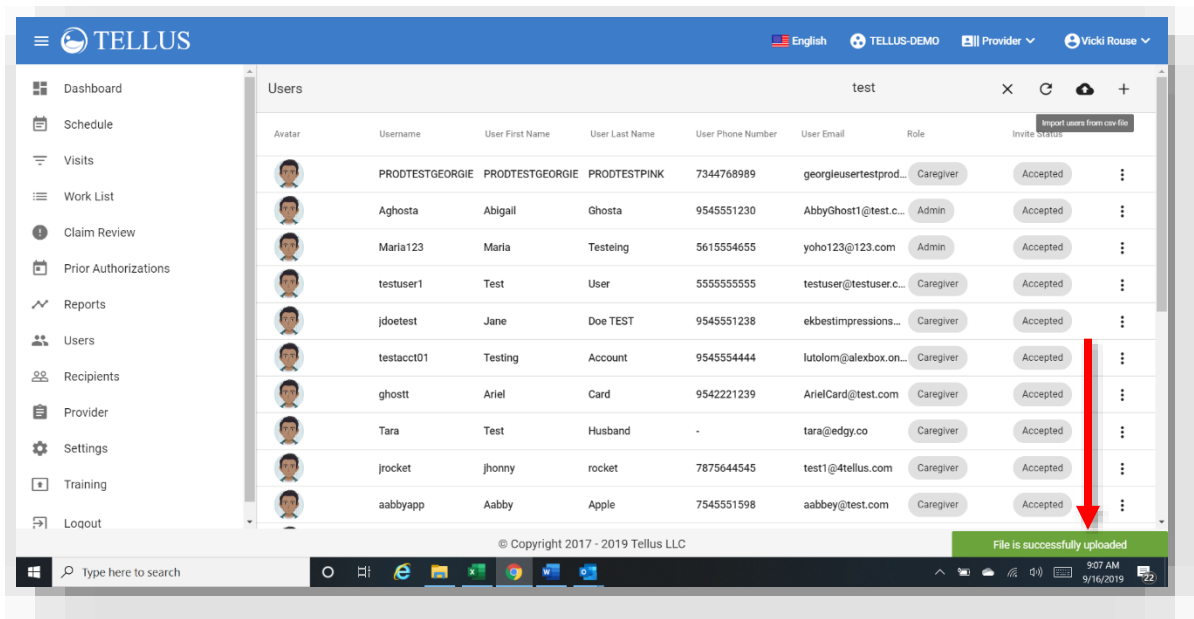


5. Click **Open**.

If there are errors in the spreadsheet a window like the one below will give you information about where the error occurred and how to correct it. Click **OK** to close the error window.



If your import is successful, a message will display at the bottom of the User page.



Related Topics:

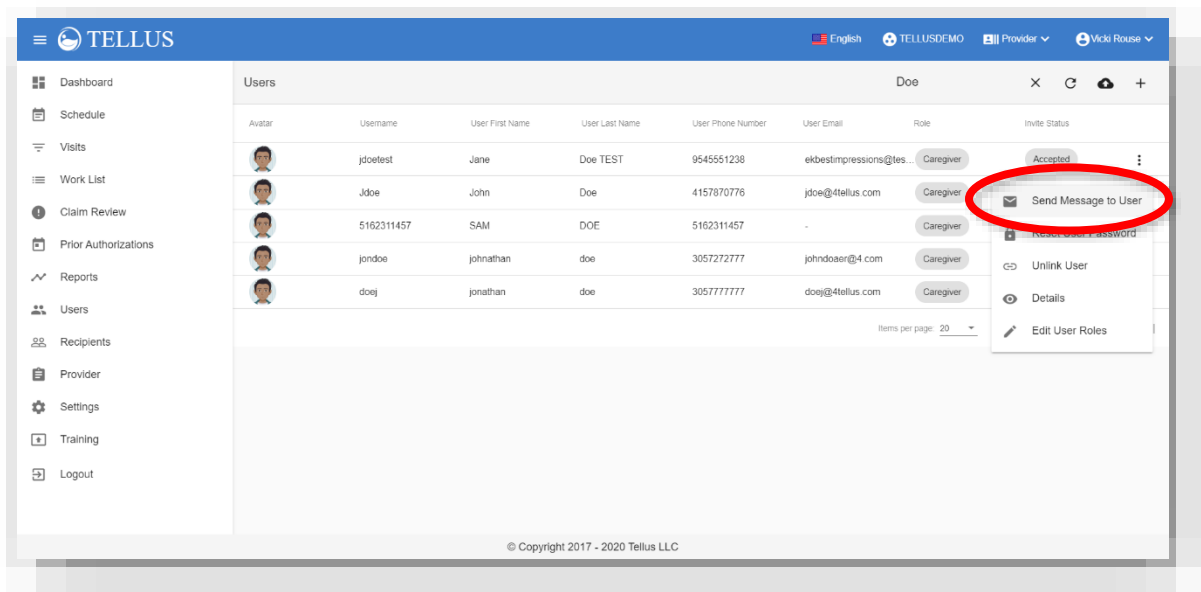
- [Viewing Users](#)
- [Viewing User Detail](#)
- [Adding a New User](#)
- [Inviting an Existing User to your Agency](#)
- [Sending a Message to a User](#)
- [Resetting User Passwords](#)
- [Unlinking and Removing Users from Tellus EVV and Reassigning Tasks](#)
- [Updating User Detail](#)
- [Editing User Roles](#)

Sending a Message to a User

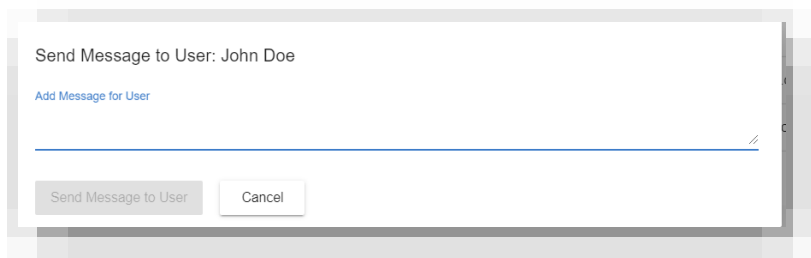
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > Sending a Message to a User

You can send a message to a User from the **Users** page.

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Users** option to see the Users page.
3. [Find the User](#) you want to send the message to.
4. Click the submenu icon (vertical dots) on the far right for the User you want to send the message to.
5. Select **Send Message**.



6. On the Send Message to User page, enter your message text and then click **Send Message to User**.



The message will be sent to the User, and you will return to the **Users** page.

If you click **Cancel** on the Send Message to User page, you will return to the **Users** page and the message will not be sent.

Note: Users assigned the role Caregiver, will receive messages on their mobile app.

Related Topics:

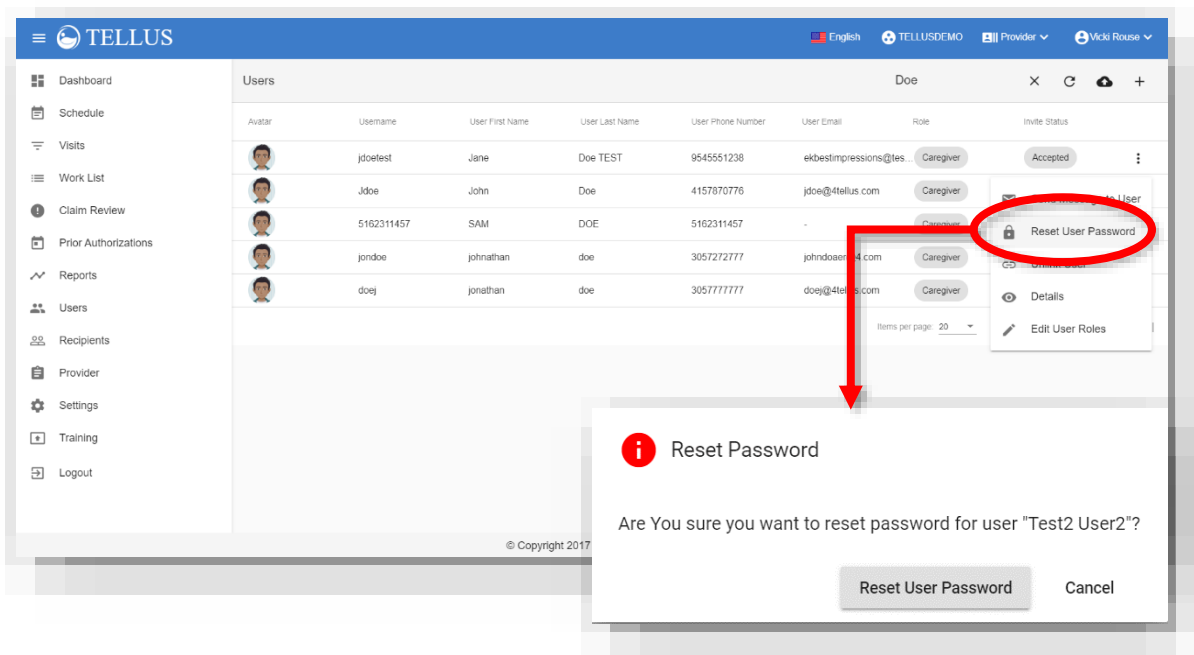
- [Viewing Users](#)
- [Viewing User Detail](#)
- [Adding a New User](#)
- [Inviting an Existing User to your Agency](#)
- [Importing a Group of New Users](#)
- [Resetting User Passwords](#)
- [Unlinking and Removing Users from Tellus EVV and Reassigning Tasks](#)
- [Updating User Detail](#)
- [Editing User Roles](#)

Resetting User Passwords

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > Resetting User Passwords

You can reset a User's password from the **Users** page. To do so:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Users** option to see the Users page.
3. [Find the User](#) whose password you want to reset.
4. Click the submenu icon (vertical dots) to see a list of actions that can be performed for a User.
5. Select **Reset password**.



The screenshot shows the Tellus EVV Administrator interface. The top navigation bar includes the Tellus logo, language settings (English), a demo account (TELLUSDEMO), provider selection, and user profile (Vicki Rouse). The left sidebar contains a main menu with options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area displays a table of users. The table has columns for Avatar, Username, User First Name, User Last Name, User Phone Number, User Email, Role, and Invite Status. A red circle highlights the 'Reset User Password' option in the submenu for a user named 'Test2 User2'. A red arrow points from this option to a pop-up dialog box titled 'Reset Password'. The dialog box contains the text 'Are You sure you want to reset password for user "Test2 User2"?' and two buttons: 'Reset User Password' and 'Cancel'.

| Avatar | Username | User First Name | User Last Name | User Phone Number | User Email | Role | Invite Status |
|--------|------------|-----------------|----------------|-------------------|-----------------------|-----------|---------------|
| | jdoetest | Jane | Doe TEST | 9545551238 | ekbestimpressions@tes | Caregiver | Accepted |
| | Jdoe | John | Doe | 4157870776 | jdoe@4tellus.com | Caregiver | |
| | 5162311457 | SAM | DOE | 5162311457 | | | |
| | jondoe | johnathan | doe | 3057272777 | johnathan@4.com | Caregiver | |
| | doej | jonathan | doe | 3057777777 | doej@4tellus.com | Caregiver | |

6. When the **Reset password** pop-up opens click **Reset Password**. The User will receive an email with a temporary password. The next time the User attempts to login, they will be prompted to enter a new password.

If you do not want to reset the password, click **Cancel** to exit the pop-up.

Related Topics:

- [Viewing Users](#)
- [Viewing User Detail](#)
- [Adding a New User](#)
- [Inviting an Existing User to your Agency](#)
- [Importing a Group of New Users](#)
- [Sending a Message to a User](#)
- [Unlinking and Removing Users from Tellus EVV and Reassigning Tasks](#)
- [Updating User Detail](#)
- [Editing User Roles](#)

Unlinking and Removing Users from Tellus EVV and Reassigning Tasks

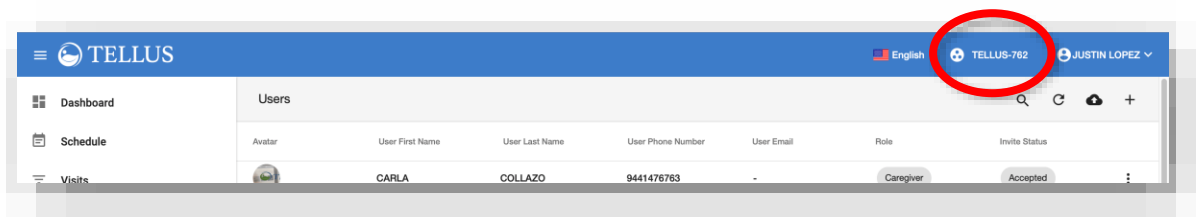
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > Unlinking and Removing Users from Tellus EVV and Reassigning Tasks

When you unlink a User, you are removing them from the Tellus system. If the User you are unlinking/removing is a Caregiver, you will also reassign the User's tasks to another User during this process.

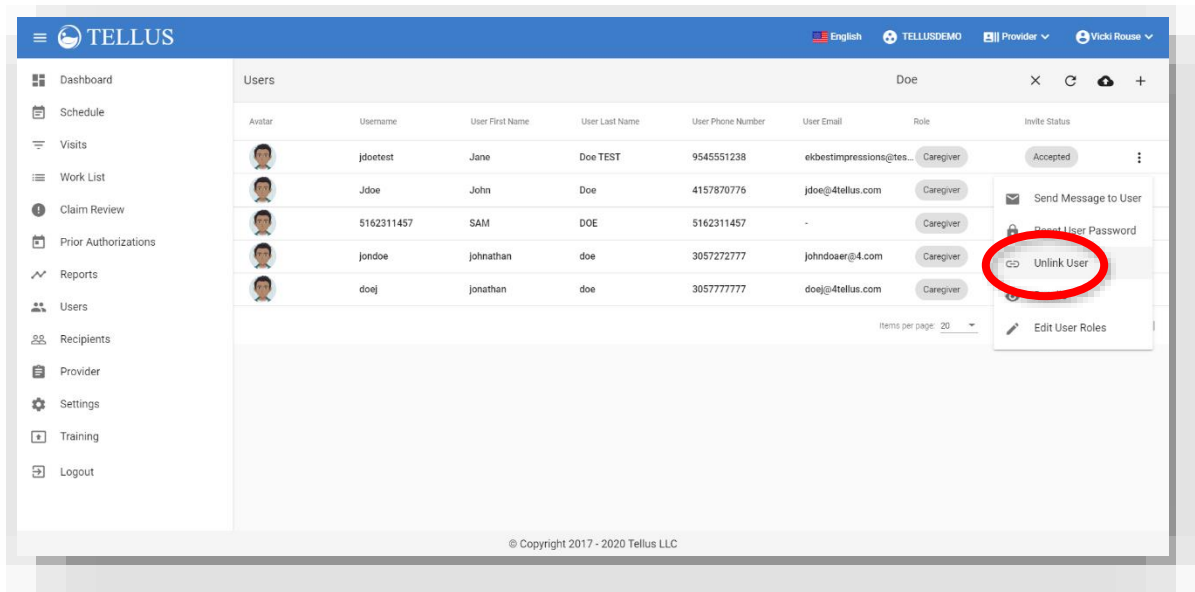
Note: Administrators cannot unlink/remove themselves; removing a User with the role Admin must be done by a different Administrator.

To unlink a User and reassign their tasks to another User.

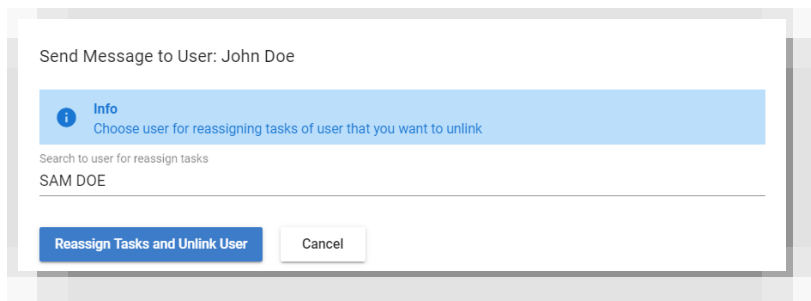
1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the Users option to see the Users page.
3. If your agency has multiple locations, click your agency name in the banner and select the correct location.



4. [Find the User](#) you want to unlink and remove.
5. For the User you want to unlink and remove, click the submenu icon (vertical dots) to see a list of actions that can be performed.
6. Select **Unlink User**.



- When the **Send Message to User** dialog opens, enter all or part of a Username or email address to find the User who the unlinked User's tasks should be reassigned to.



- Click **Reassign Tasks and Unlink User**. That User will be unlinked and removed from the system.

To exit the popup without unlinking the User, click **Cancel**.

Related Topics:

- [Viewing Users](#)
- [Viewing User Detail](#)
- [Adding a New User](#)
- [Inviting an Existing User to your Agency](#)
- [Importing a Group of New Users](#)
- [Sending a Message to a User](#)
- [Resetting User Passwords](#)
- [Updating User Detail](#)
- [Editing User Roles](#)

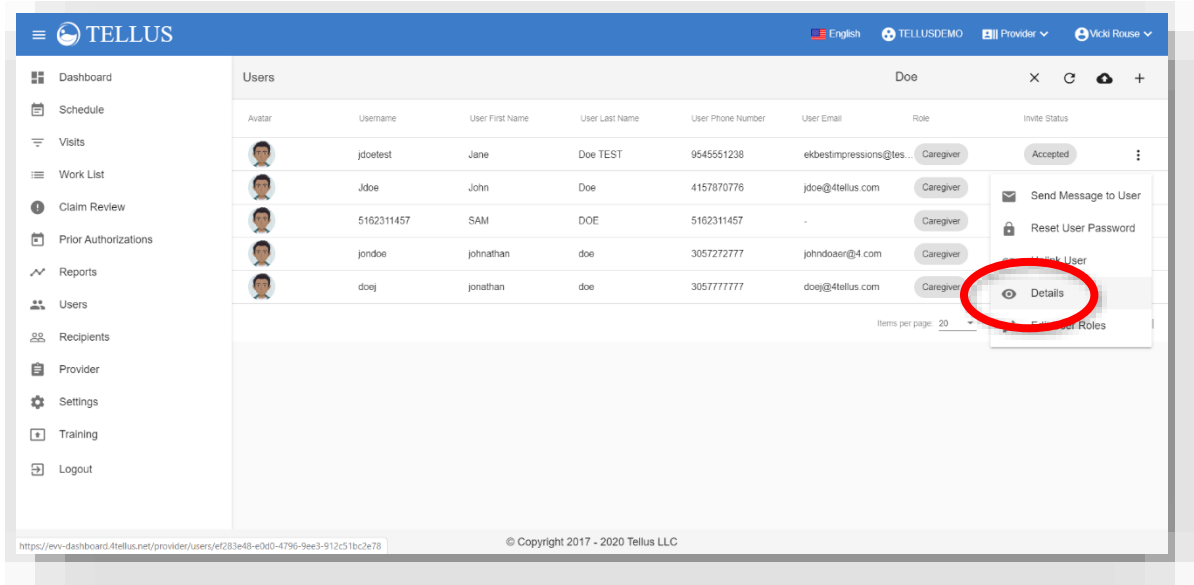
Updating User Detail

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > Updating User Detail

You can update User from the **Users** page.

Note: If the User works for more than one agency, they are the only person who can edit their profile and can do so through the Tellus EVV Mobile app. The Profile option can be found on the Main Menu on the app.

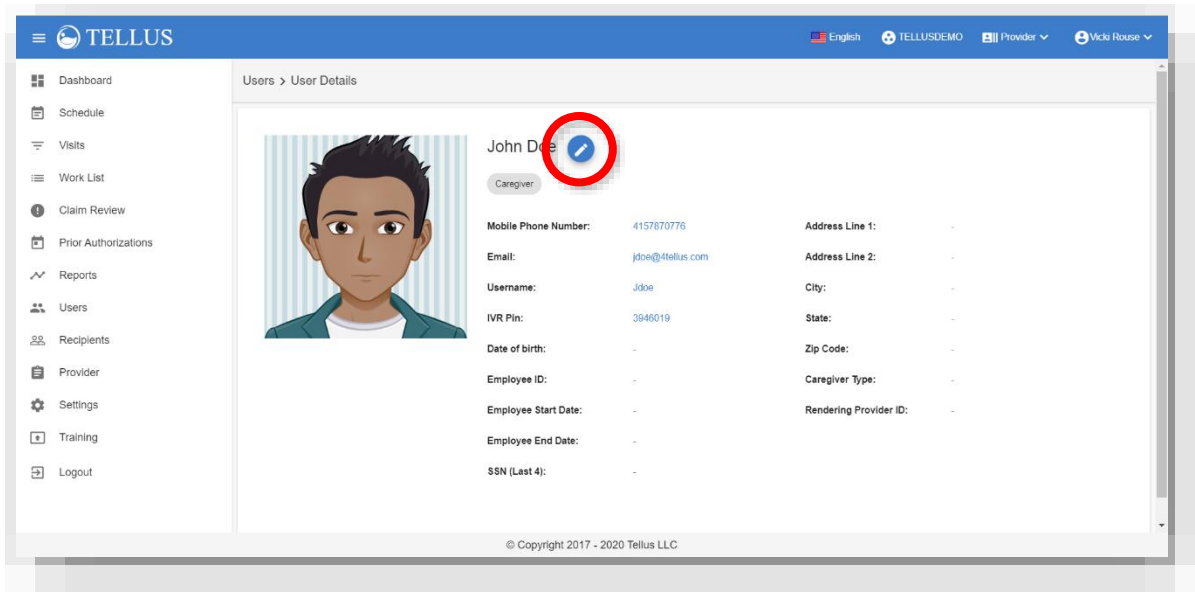
1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Users** option to see the Users page.
3. [Find the User](#) you want to update.
4. Click the submenu icon (vertical dots) to see a list of actions that can be performed for a User.
5. Select **Detail**.



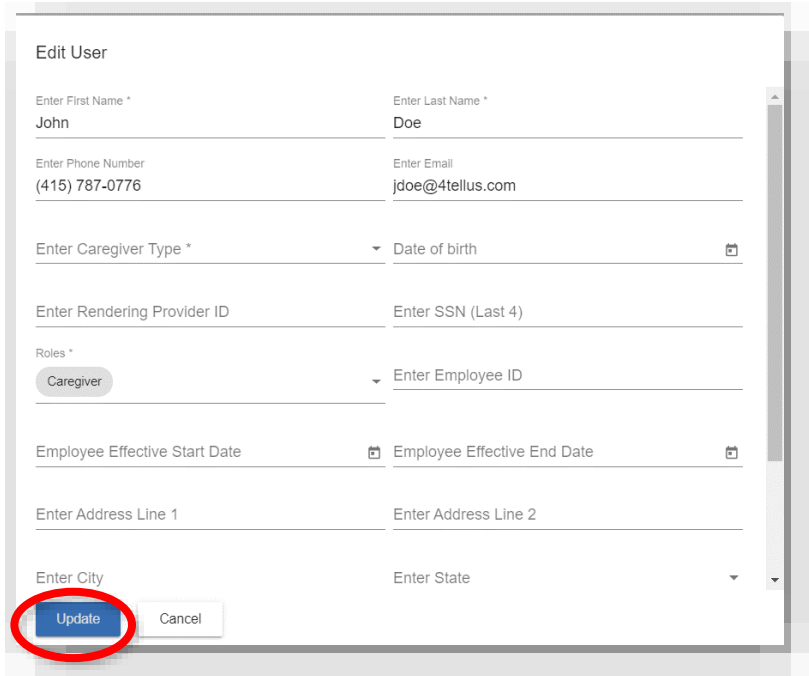
The screenshot shows the Tellus EVV Administrator interface. The top navigation bar includes the Tellus logo, language settings (English), a demo account (TELLUSDEMO), and user information (Provider, Micki Rouse). A sidebar menu on the left lists various system functions like Dashboard, Schedule, Visits, Work List, Claim Review, etc. The main content area displays a 'Users' table with columns for Avatar, Username, User First Name, User Last Name, User Phone Number, User Email, Role, and Invite Status. A dropdown menu is open for the user 'doej', showing options like 'Send Message to User', 'Reset User Password', and 'Details'. The 'Details' option is highlighted with a red circle.

| Avatar | Username | User First Name | User Last Name | User Phone Number | User Email | Role | Invite Status |
|--------|------------|-----------------|----------------|-------------------|--------------------------|-----------|---------------|
| | jdoetest | Jane | Doe TEST | 9545551238 | ekbestimpressions@tes... | Caregiver | Accepted |
| | Jdoe | John | Doe | 4157870776 | jdoe@4tellus.com | Caregiver | |
| | 5162311457 | SAM | DOE | 5162311457 | - | Caregiver | |
| | jondoe | johnathan | doe | 3057272777 | johndoer@4.com | Caregiver | |
| | doej | jonathan | doe | 3057777777 | doej@4tellus.com | Caregiver | |

6. When the User Detail screen opens, click the “pencil” icon to open the fields for editing.



7. Make entries and changes as needed. Scroll down to see additional fields.
8. Click **Update**.



Related Topics:

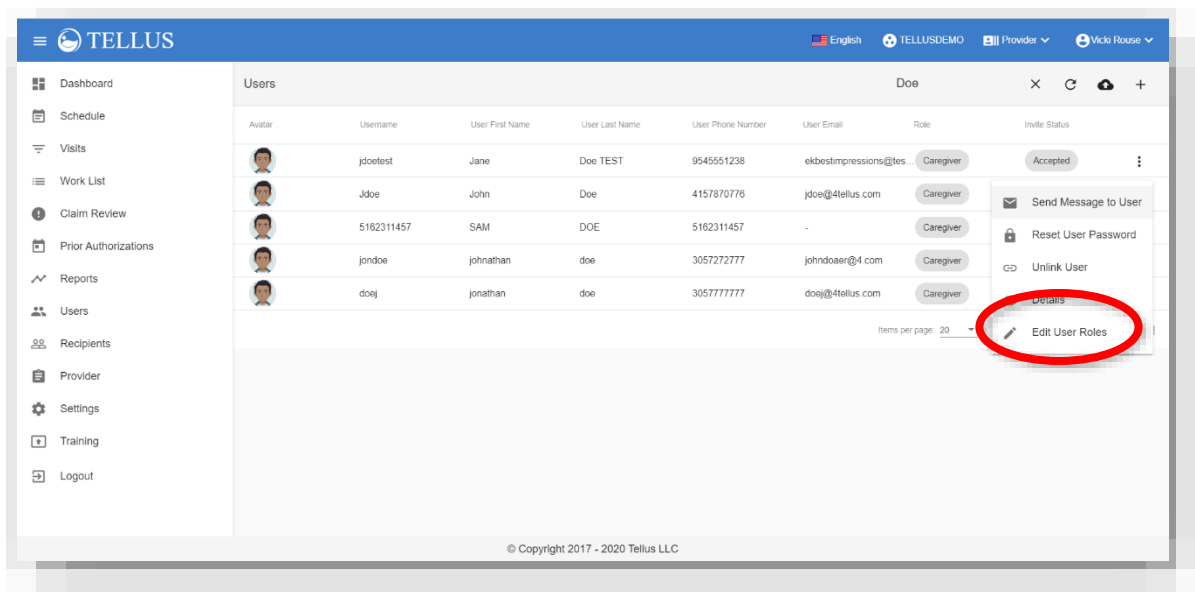
- [Viewing Users](#)
- [Viewing User Detail](#)
- [Adding a New User](#)
- [Inviting an Existing User to your Agency](#)
- [Importing a Group of New Users](#)
- [Sending a Message to a User](#)
- [Resetting User Passwords](#)
- [Editing User Roles](#)

Editing User Roles

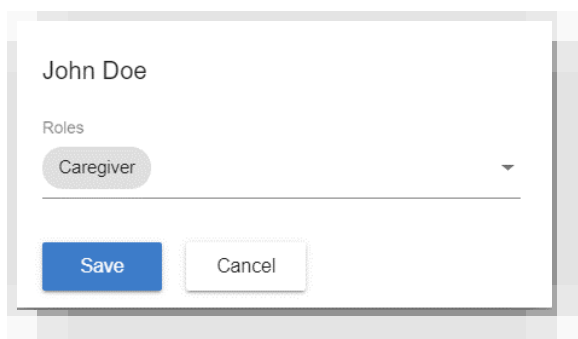
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Users](#) > Editing User Roles

You can edit a User's role from the **Users** page.

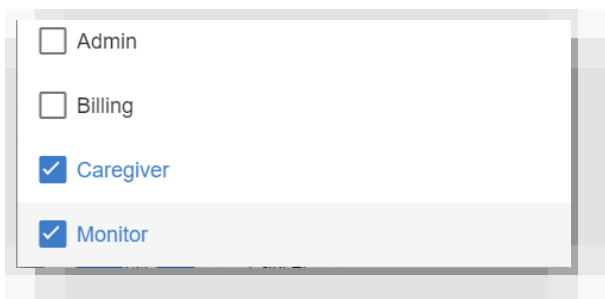
1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Users** option to see the Users page.
3. OPTIONAL: Find the User whose roles you want to change.
4. Click the submenu icon (vertical dots) to see a list of actions that can be performed for a User.
5. Select **Edit User Roles**.



6. When the pop-up dialog opens, use the drop-down menu to see available roles.



7. Add (check) or remove (uncheck) roles that are appropriate for the User. You can select more than one role for a User. The choices are:
 - **Admin** — This role allows the User to view and edit information in the Administrator Console. There is no need to select any other role; Administrators have access to everything in the system.
 - **Billing** — This role allows the User to access Claims functions only: Visits, Work List, Claim Review, and Prior Authorizations. This role can be combined with any other role, except Monitor.
 - **Caregiver** — This role allows the User to view only the information and schedules for the Recipients for whom they provide care. If a User is assigned the Caregiver only, that User will only have access to information on their EVV mobile app; they will not have access to the Administrator Console.
 - **Monitor** — This role allows the User to only view information. Users assigned the Monitor role cannot make any changes using the Administrator Console. This role can be combined with Caregiver only.

A screenshot of a user role selection interface. It shows a list of four roles with checkboxes: Admin (unchecked), Billing (unchecked), Caregiver (checked), and Monitor (checked). The interface is a simple white box with a grey border and a light grey background for the list items.

| | |
|-------------------------------------|-----------|
| <input type="checkbox"/> | Admin |
| <input type="checkbox"/> | Billing |
| <input checked="" type="checkbox"/> | Caregiver |
| <input checked="" type="checkbox"/> | Monitor |

8. Click **Save**.

The information will be saved, and you will return to the **Users** page.

If you do not want to change the User's roles, click **Cancel** to return to the **Users** page; your changes will not be saved.

Related Topics:

- [Viewing Users](#)
- [Viewing User Detail](#)
- [Adding a New User](#)
- [Inviting an Existing User to your Agency](#)
- [Importing a Group of New Users](#)
- [Sending a Message to a User](#)
- [Resetting User Passwords](#)
- [Unlinking and Removing Users from Tellus EVV and Reassigning Tasks](#)
- [Updating User Detail](#)

Managing Recipients

You are here: [Tellus EVV Administrator User Guide](#) > Managing Recipients

Click a topic below:

[Searching for and Viewing Recipients](#)

[Viewing Recipients](#)

[Changing the Number of Recipients Displayed Per Page](#)

[Searching for a Specific Recipient](#)

[Adding a New Recipient](#)

[Adding a Recipient: Entries](#)

[Adding Recipient Information](#)

[Entering Emergency Contact Information](#)

[Entering a Recipient Address](#)

[Entering Payer Subscription Information](#)

[Importing a Group of New Recipients](#)

[Completing the Spreadsheet](#)

[Importing the Spreadsheet](#)

[Editing a Recipient](#)

[Updating General Recipient Information](#)

[Updating Addresses](#)

[Updating an Address](#)

[Adding a New Address](#)

[Setting an Address as Primary](#)

[Deleting an Address](#)

[Updating Payer Subscriptions](#)

[Adding a New Payer](#)

[Deleting a Payer](#)

[Entering Notes](#)

[Entering a Referring Physician](#)

[Uploading Documents for a Recipient](#)

[Managing Uploaded Document](#)

[Deactivating a Recipient](#)

[Activating an Inactive Recipient](#)

Searching for and Viewing Recipients

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > Searching for and Viewing Recipients

In this topic you will find instructions for:

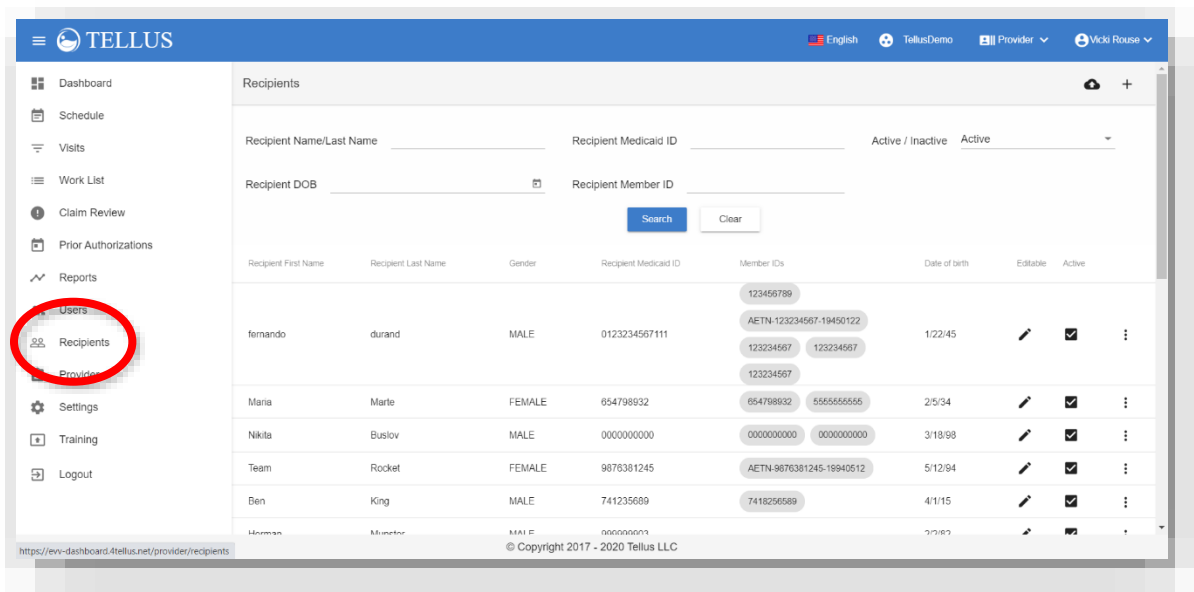
- [Viewing Recipients](#)
- [Changing the Number of Recipients Displayed per Page](#)
- [Searching for a Specific Recipient](#)

Viewing Recipients

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Searching for and Viewing Recipients](#) > Viewing Recipients

To view recipients:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the Recipients option.



The screenshot shows the Tellus Recipients page. The left sidebar has a red circle around the 'Recipients' option. The main content area displays a table of recipient information with the following columns: Recipient First Name, Recipient Last Name, Gender, Recipient Medicaid ID, Member IDs, Date of birth, Editable, and Active. The table contains several rows of data, including recipients like fernando durand, Maria Marte, Nikita Buslov, Team Rocket, and Ben King.

| Recipient First Name | Recipient Last Name | Gender | Recipient Medicaid ID | Member IDs | Date of birth | Editable | Active |
|----------------------|---------------------|--------|-----------------------|--|---------------|----------|-------------------------------------|
| fernando | durand | MALE | 0123234567111 | 123456789 AETN-123234567-19450122 123234567 123234567 123234567 | 1/22/45 | | <input checked="" type="checkbox"/> |
| Maria | Marte | FEMALE | 654798932 | 654798932 5555555555 | 2/5/34 | | <input checked="" type="checkbox"/> |
| Nikita | Buslov | MALE | 0000000000 | 0000000000 0000000000 | 3/18/98 | | <input checked="" type="checkbox"/> |
| Team | Rocket | FEMALE | 9876381245 | AETN-9876381245-19940512 | 5/12/94 | | <input checked="" type="checkbox"/> |
| Ben | King | MALE | 741235689 | 7418256589 | 4/1/15 | | <input checked="" type="checkbox"/> |

The **Recipients** page opens and displays the following information for all Recipients.

- **First name**
- **Last name**
- **Gender**
- **Date of birth**
- **Editable:**
 - A “pencil icon” indicates that the Recipient details can be edited.
 - An “eye” icon indicates that the Recipients have been uploaded by the Payer and Recipient details can be viewed but not edited.
- A submenu (vertical dots) that offers options for sending messages, resetting password, unlinking/deleting Users, and updating User details and User roles.

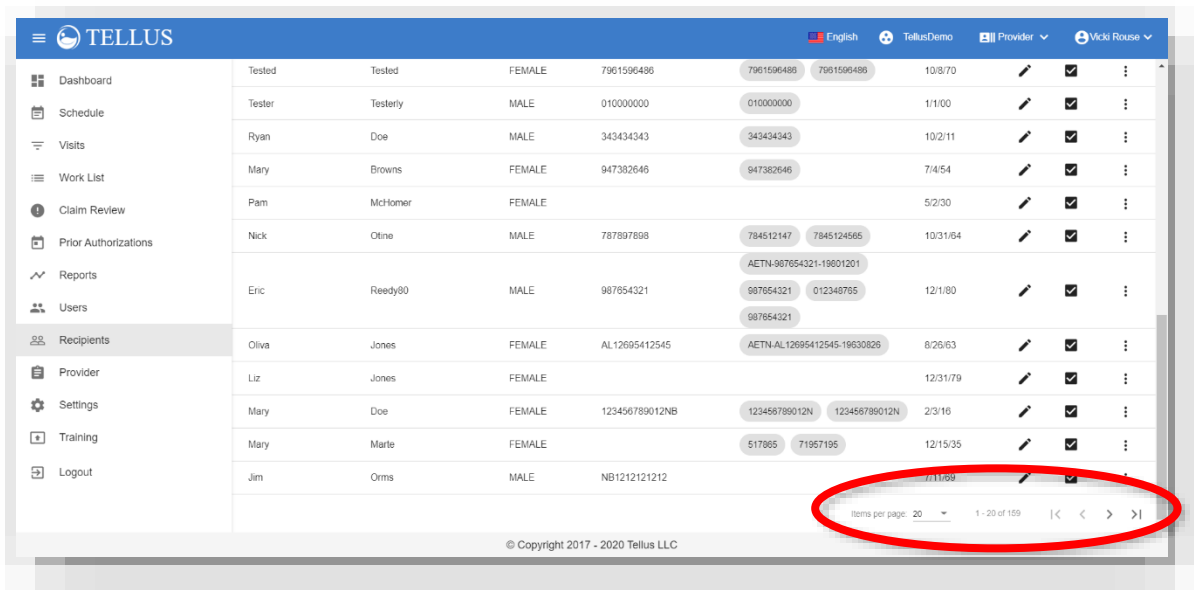
3. You can sort the results by clicking the title of the column for **Recipient First Name**, **Recipient Last Name**, **Gender**, or **Date of Birth**; click the same column title again to reverse the order.

Changing the Number of Recipients Displayed Per Page

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Searching for a viewing Recipients](#) > Changing the Number of Recipients Displayed Per Page

To change the number of Recipients that appear on each page:

1. Scroll to the bottom of the page.
2. Click the **Items per page** dropdown arrow and make a selection: 20, 50 or 100 Recipients per page.



| First Name | Last Name | Gender | Phone Number | Address | City | State | Zip | Date of Birth | Actions |
|------------|-----------|--------|----------------|-----------------------------|---------------|-----------|-----|---------------|-----------------------|
| Tested | Tested | FEMALE | 7961596486 | 7961596486 | 7961596486 | | | 10/3/70 | [Edit] [Check] [More] |
| Tester | Testerty | MALE | 010000000 | 010000000 | | | | 1/1/00 | [Edit] [Check] [More] |
| Ryan | Doe | MALE | 343434343 | 343434343 | | | | 10/2/11 | [Edit] [Check] [More] |
| Mary | Browns | FEMALE | 947382646 | 947382646 | | | | 7/4/54 | [Edit] [Check] [More] |
| Pam | Mchlomer | FEMALE | | | | | | 5/2/30 | [Edit] [Check] [More] |
| Nick | Otine | MALE | 787897898 | 784512147 | 7845124565 | | | 10/31/64 | [Edit] [Check] [More] |
| Eric | Reedy90 | MALE | 987854321 | AETN-987854321-19801201 | 987854321 | 012348765 | | 12/1/80 | [Edit] [Check] [More] |
| Oliva | Jones | FEMALE | AL12695412545 | AETN-AL12695412545-19930826 | | | | 8/26/63 | [Edit] [Check] [More] |
| Liz | Jones | FEMALE | | | | | | 12/31/79 | [Edit] [Check] [More] |
| Mary | Doe | FEMALE | 123456789012NB | 123456789012N | 123456789012N | | | 2/3/16 | [Edit] [Check] [More] |
| Mary | Marle | FEMALE | | 517865 | 71957195 | | | 12/15/35 | [Edit] [Check] [More] |
| Jim | Orms | MALE | NB1212121212 | | | | | 11/1/59 | [Edit] [Check] [More] |

Items per page: 20 | 1 - 20 of 159 | < > >> <<

3. If the number of Recipients exceeds the space available your screen, you can view additional Recipients by clicking the arrows at the bottom of the screen. The Recipients as well as the counter at the bottom updates to reflect the range of records presented (for example, 1-20 of 98 Recipients).

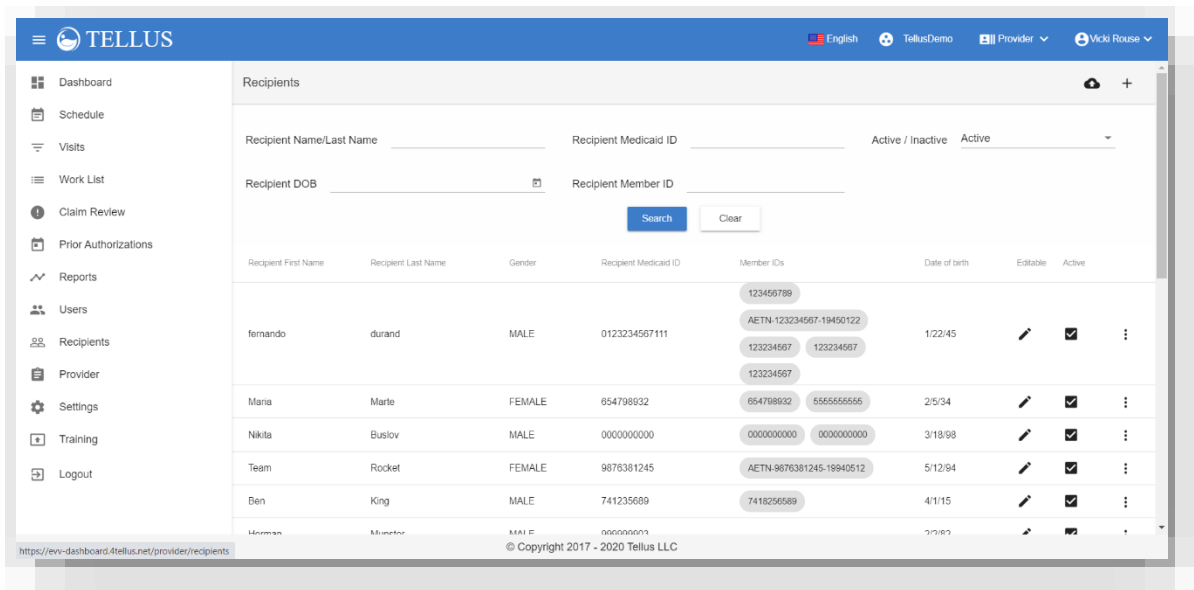
Searching for a Specific Recipient

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Searching for a viewing Recipients](#) > Searching for a Specific Recipient

To search for a specific Recipient:

1. Make an entry in any or all of the fields at the top of the page – **Recipient Name/Last Name, Recipient Medicaid ID, Recipient DOB, Recipient Member ID, and/or Active/Inactive** – to narrow the list of Recipients displayed and then click **Search**.

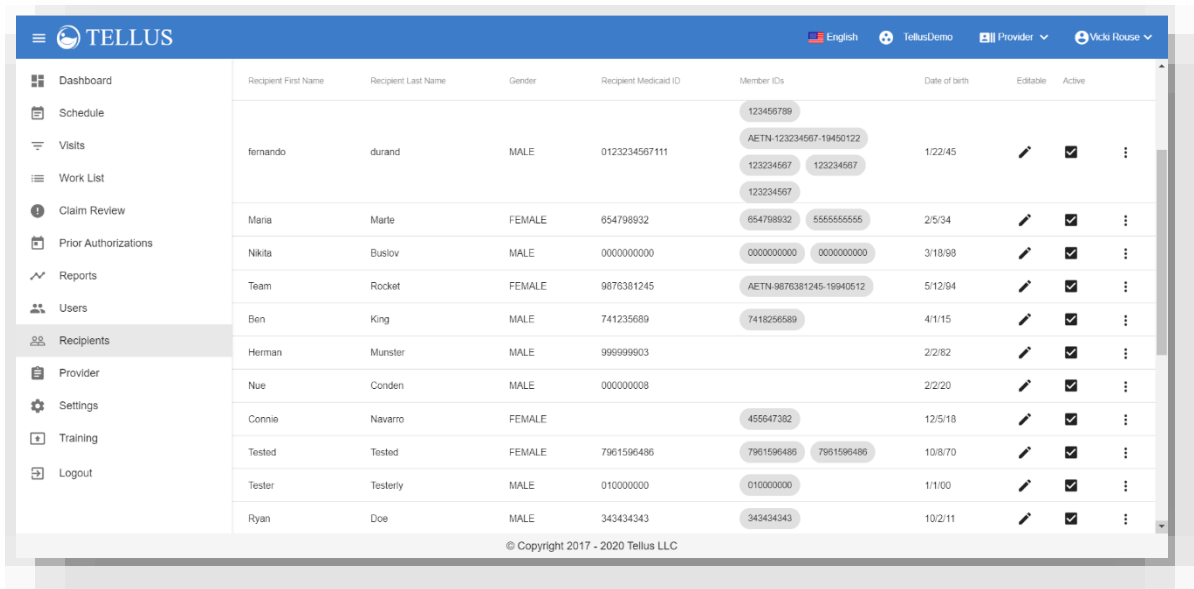
Click “X” in any field to remove the search criteria.



The screenshot displays the 'Recipients' management page in the Tellus EVV Administrator User Guide. The interface includes a navigation sidebar on the left with options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area features search filters for Recipient Name/Last Name, Recipient Medicaid ID, Recipient DOB, and Recipient Member ID, along with an 'Active / Inactive' dropdown menu. A 'Search' button and a 'Clear' button are present. Below the filters is a table listing recipients with columns for Recipient First Name, Recipient Last Name, Gender, Recipient Medicaid ID, Member IDs, Date of birth, Editable, and Active. The table contains several entries, including fernando durand, Maria Marte, Nikita Buslov, Team Rocket, Ben King, and Herman Munster. The footer of the page shows the URL 'https://evv-dashboard.4tellus.net/provider/recipients' and the copyright notice '© Copyright 2017 - 2020 Tellus LLC'.

*Note: The **Active/Inactive** field defaults to “Active.” You can also select Inactive, or All to see both active and inactive users. See [Deactivating a Recipient](#) and [Activating an Inactive Recipient](#) for more information.*

All Recipients who have entries in their profiles that match the search criteria will display.



The screenshot shows the TELLUS interface with a sidebar menu on the left and a table of recipients. The sidebar includes options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The table has columns for Recipient First Name, Recipient Last Name, Gender, Recipient Medicaid ID, Member IDs, Date of birth, Editable, and Active. The table contains 12 rows of recipient data.

| Recipient First Name | Recipient Last Name | Gender | Recipient Medicaid ID | Member IDs | Date of birth | Editable | Active |
|----------------------|---------------------|--------|-----------------------|--|---------------|----------|-------------------------------------|
| fernando | durand | MALE | 0123234567111 | 123456789 AETN-123234567-19450122 123234567 123234567 123234567 | 1/22/45 | | <input checked="" type="checkbox"/> |
| Maria | Marte | FEMALE | 654789932 | 654789932 55555555555 | 2/5/34 | | <input checked="" type="checkbox"/> |
| Nikita | Buslov | MALE | 000000000 | 000000000 000000000 | 3/18/98 | | <input checked="" type="checkbox"/> |
| Team | Rocket | FEMALE | 9876381245 | AETN-9876381245-19940612 | 5/12/94 | | <input checked="" type="checkbox"/> |
| Ben | King | MALE | 741235689 | 7418256589 | 4/1/15 | | <input checked="" type="checkbox"/> |
| Herman | Munster | MALE | 999999903 | | 2/2/82 | | <input checked="" type="checkbox"/> |
| Nue | Conden | MALE | 000000008 | | 2/2/20 | | <input checked="" type="checkbox"/> |
| Connie | Navano | FEMALE | | 455047302 | 12/5/18 | | <input checked="" type="checkbox"/> |
| Tested | Tested | FEMALE | 7961596486 | 7961596486 7961596486 | 10/8/70 | | <input checked="" type="checkbox"/> |
| Tester | Testerly | MALE | 010000000 | 010000000 | 1/1/00 | | <input checked="" type="checkbox"/> |
| Ryan | Doe | MALE | 343434343 | 343434343 | 10/2/11 | | <input checked="" type="checkbox"/> |

© Copyright 2017 - 2020 Tellus LLC

Related Topics

- [Adding a New Recipient](#)
- [Importing a Group of New Recipients](#)
- [Editing a Recipient](#)
- [Uploading Documents for a Recipient](#)
- [Deactivating a Recipient](#)
- [Activating an Inactive Recipient](#)

Adding a New Recipient

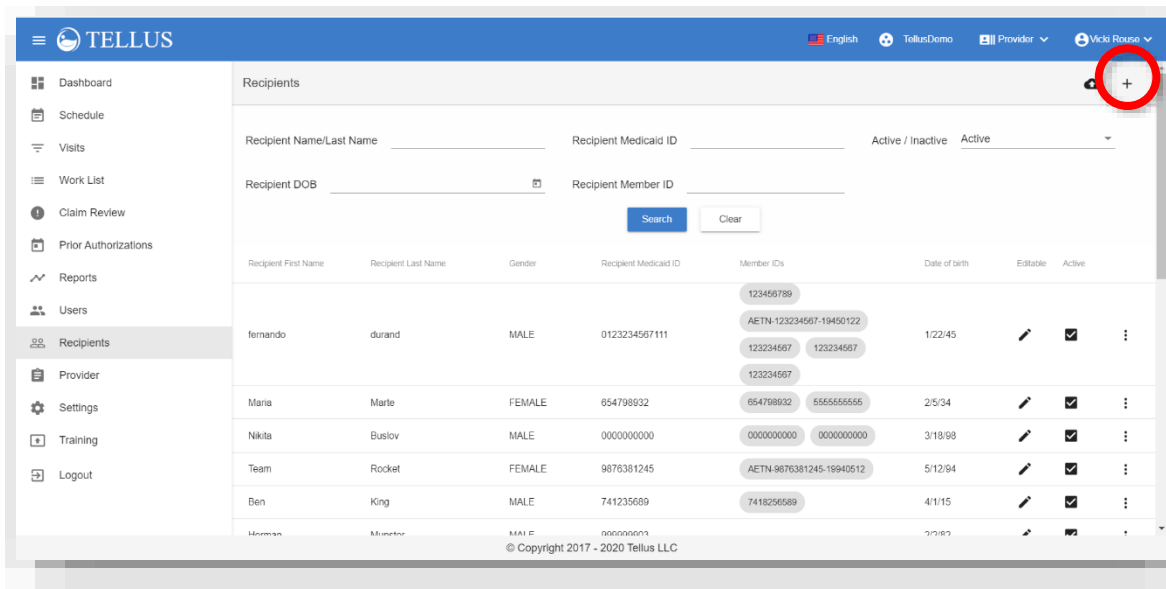
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > Adding a New Recipient

Recipients are the people to whom your Caregivers will provide services. Depending on the Payer and the Program, there are two ways to add Recipients: you can add individual Recipients or you can [import a group of Recipients](#).

Note: When you add Recipients to the Tellus EVV system they automatically have the status Active; you can inactivate Recipients that you no longer provide services for, who are no longer eligible for services, or who were entered under the wrong agency. See [Deactivating a Recipient](#).

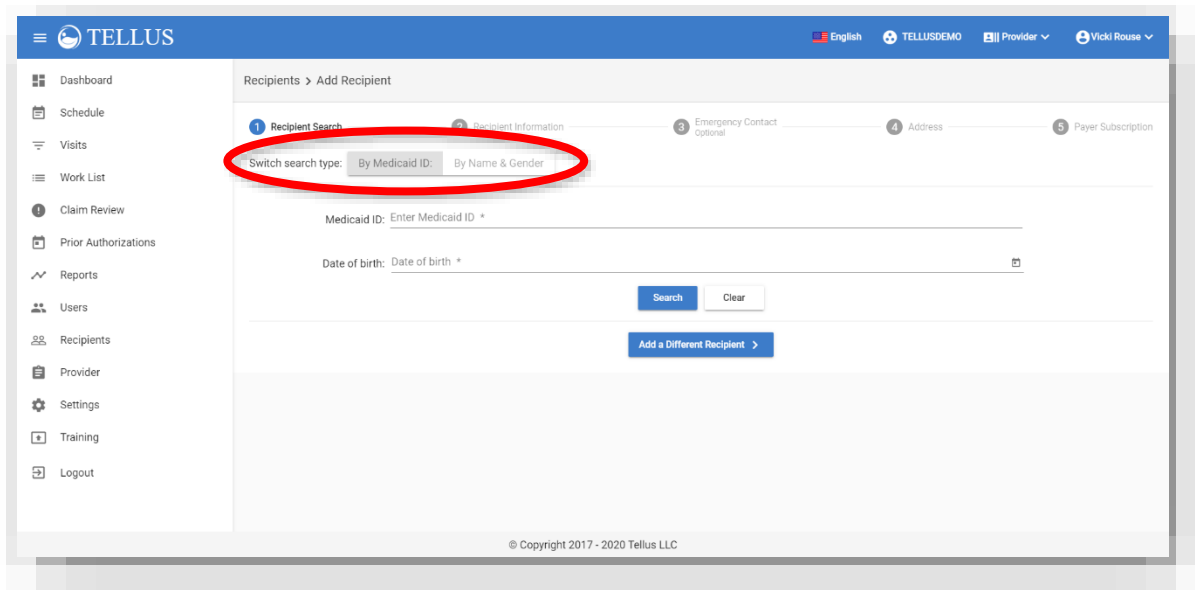
To add an individual Recipient, follow these steps:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Recipients** option to see the **Recipients** page.
3. Click the “add” icon (plus sign) in the upper right corner to open the **Add Recipient** page.



The screenshot shows the Tellus EVV Administrator User Guide interface. The top navigation bar includes the Tellus logo, language settings (English), user information (TellusDemo), provider selection (Provider), and a user profile icon (Victor Rouse). The left sidebar contains a main menu with options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients (highlighted), Provider, Settings, Training, and Logout. The main content area is titled 'Recipients' and features a search form with fields for Recipient Name/Last Name, Recipient Medicaid ID, Recipient DOB, and Recipient Member ID. Below the search form is a table listing recipients with columns for Recipient First Name, Recipient Last Name, Gender, Recipient Medicaid ID, Member IDs, Date of birth, Editable, Active, and a menu icon. The table contains several rows of recipient data, including 'fernando durand', 'Maria Marte', 'Nikita Buslov', 'Team Rocket', and 'Ben King'. The 'Add Recipient' icon (plus sign) in the upper right corner of the Recipients page is circled in red.

4. OPTIONAL: When the Recipient Search window opens search to see if the Recipient exists in the system.
 - Click **By Medicaid ID** to search by Medicaid ID and date of birth.
 - Click **By Name & Gender** to search by name and date of birth.



TELLUS

English TELLUDEMO Provider Vicki Rouse

Recipients > Add Recipient

1 Recipient Search 2 Recipient Information 3 Emergency Contact Optional 4 Address 5 Payer Subscription

Switch search type: **By Medicaid ID** By Name & Gender

Medicaid ID: Enter Medicaid ID *

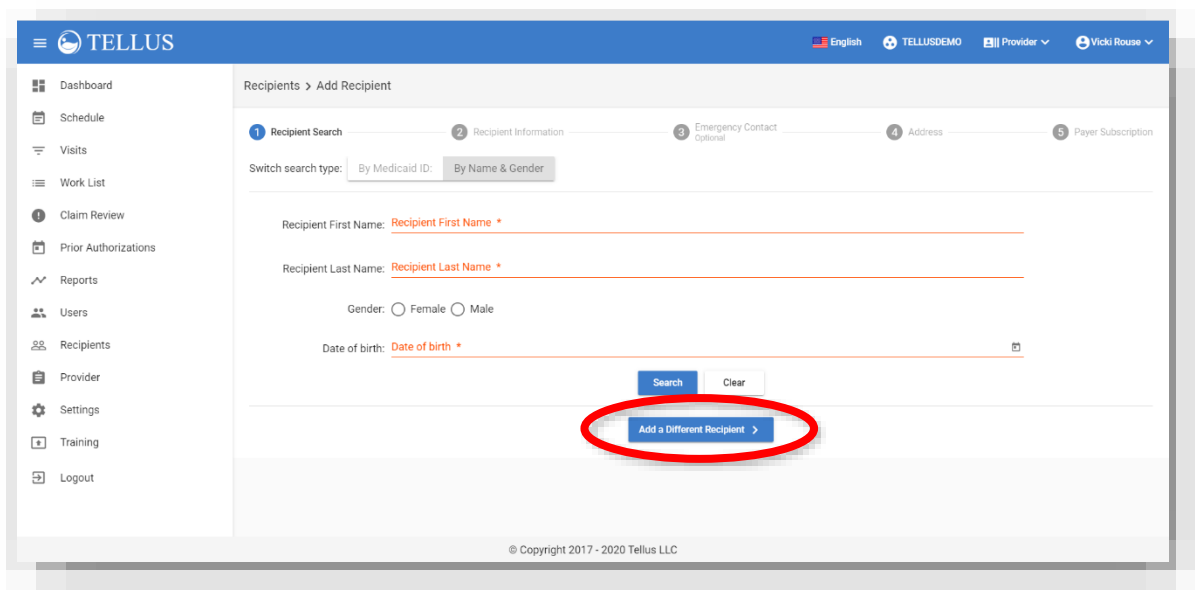
Date of birth: Date of birth *

Search Clear

Add a Different Recipient >

© Copyright 2017 - 2020 Tellus LLC

5. If the User does not exist, click **Add a Different Recipient** to move to the next step in the process: **Recipient Information**.



TELLUS

English TELLUDEMO Provider Vicki Rouse

Recipients > Add Recipient

1 Recipient Search 2 Recipient Information 3 Emergency Contact Optional 4 Address 5 Payer Subscription

Switch search type: By Medicaid ID **By Name & Gender**

Recipient First Name: Recipient First Name *

Recipient Last Name: Recipient Last Name *

Gender: Female Male

Date of birth: Date of birth *

Search Clear

Add a Different Recipient >

© Copyright 2017 - 2020 Tellus LLC



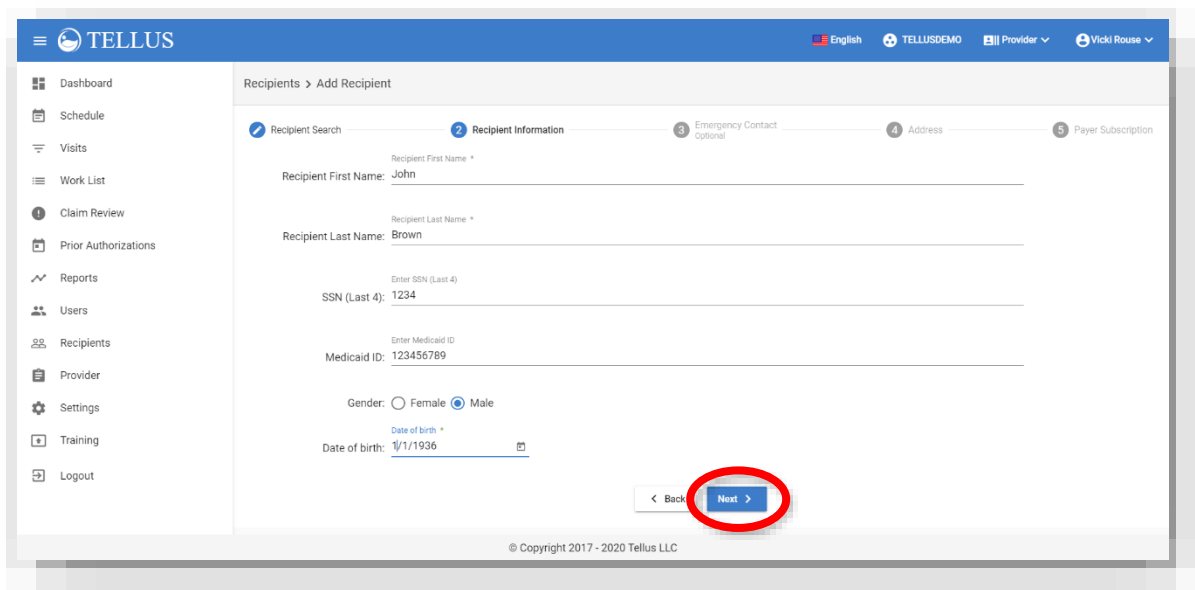
6. Complete the information following the numbered steps on the screen. Instructions follow in [Adding a Recipient: Entries](#).
7. Click **Save** when you finish making your entries.

Adding a Recipient: Entries (Available if allowed by program)

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Adding a New Recipient](#) > Adding a Recipient: Entries

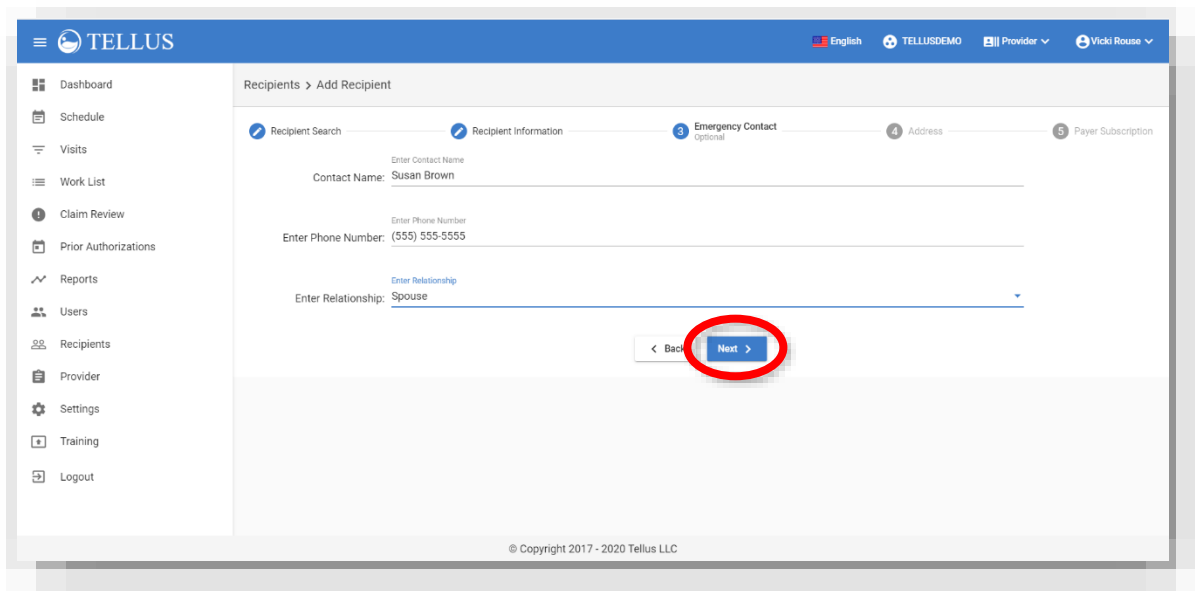
Adding Recipient Information

1. Complete all required fields (as noted by an *) and as many of the optional fields as possible. You will need to scroll down to see all fields.
 - **Recipient First name***: Enter the new Recipient's first name.
 - **Recipient Last name***: Enter the new Recipient's last name.
 - **SSN (Last 4)**: Enter the last 4 digits of the new Recipient's social security number.
 - **Gender**: Select the gender using the radio buttons. The default selection is male.
 - **Date of Birth***: Enter the new Recipient's date of birth by typing the date by clicking the [calendar icon](#) and selecting a date from the calendar.
2. Click **Next** to move to the next step: Emergency Contact Information.



*Note: Clicking **Next** does not save your entries. You will save at the last step, Payer Subscription. Do not use your browser's **Back** button at any point while you enter Recipients. If you do, you will return to the main Recipients page and your entries will be lost.*

Entering Emergency Contact Information

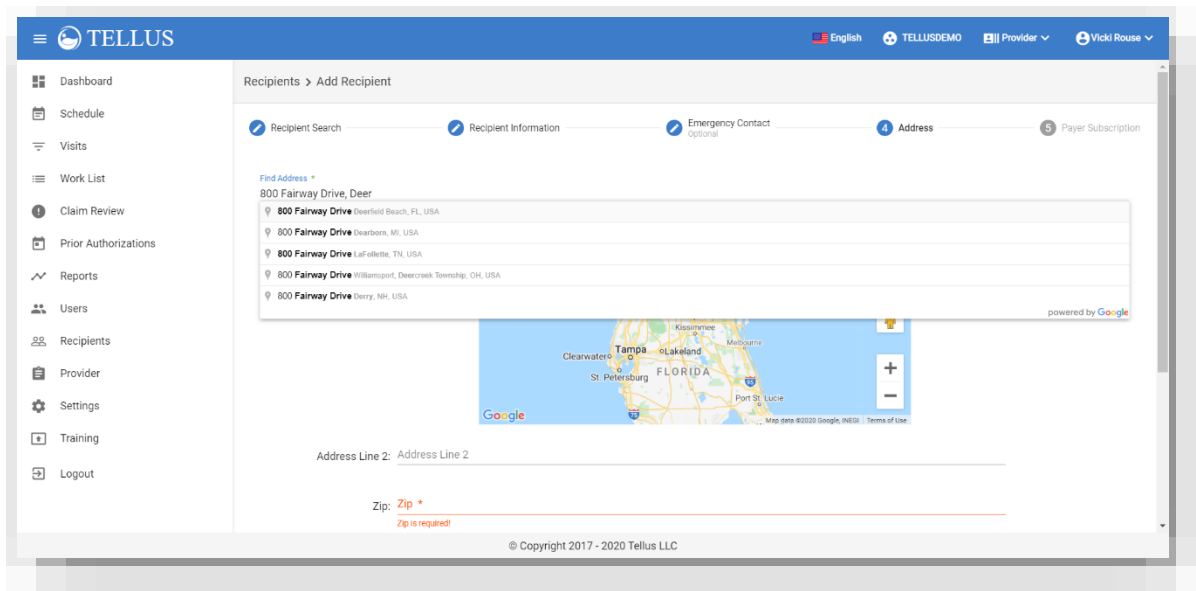


The screenshot shows the 'Recipients > Add Recipient' form in the TELLUS system. The form is divided into five steps: 1. Recipient Search, 2. Recipient information, 3. Emergency Contact (optional), 4. Address, and 5. Payer Subscription. The 'Emergency Contact' step is currently active. The form fields are: 'Enter Contact Name' with the value 'Susan Brown', 'Enter Phone Number' with the value '(555) 555-5555', and 'Enter Relationship' with a dropdown menu set to 'Spouse'. A red circle highlights the 'Next' button at the bottom right of the form. The left sidebar contains navigation options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The top right of the page shows 'English', 'TELLUSDEMO', 'Provider', and 'Vicki Rouse'.

1. Enter the following contact information.
 - **Contact Name:** Enter an Emergency Contact Name for the Recipient.
 - **Enter Phone Number:** Enter the Emergency Contact’s Phone Number.
 - **Enter Relationship:** Use the dropdown list to select the Emergency Contact’s relationship to the Recipient. Choose **None**, **Child**, **Friend**, **Other**, **Parent**, **Sibling**, **Spouse**, or **Unknown**.
2. Click **Next** to move to the next step: **Address**.

*Note: Remember, clicking **Next** does not save your entries. You will save at the last step, Payer Subscription. Do not use your browser’s **Back** button; your entries will be lost.*

Entering a Recipient Address



The screenshot shows the 'Recipients > Add Recipient' page in the Tellus system. The page has a blue header with the Tellus logo, language settings (English), a demo account (TELLUSDEMO), a provider dropdown, and a user dropdown (Vicki Rouse). A left sidebar contains navigation options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area is titled 'Recipients > Add Recipient' and features a progress bar with five steps: 1. Recipient Search, 2. Recipient Information, 3. Emergency Contact (Optional), 4. Address (current step), and 5. Payer Subscription. Below the progress bar is a 'Find Address' field with a dropdown menu showing suggestions for '800 Fairway Drive' in various locations like Deerfield Beach, Dearborn, LaFayette, Williamsport, and Derry. A map of Florida is displayed below the suggestions. At the bottom of the form, there are fields for 'Address Line 2' and 'Zip' (with a red asterisk and 'Zip is required' error message). The footer indicates '© Copyright 2017 - 2020 Tellus LLC'.

1. Type an address in the **Find Address** field; addresses that match your entry will appear in a dropdown list. You can select one to complete most fields on the page.

Note: If the address you are trying to add is not found in Tellus, open another browser window and use Google to search for the address to see how it appears in their database. For example, Google may have NE as North East or vice versa, or Lakepoint as Lake Point or vice versa.

2. Scroll down to see all fields and make entries and updates as needed.
3. Enter a **Primary Phone** number; this field is required.

If your agency uses IVR instead of the Tellus EVV mobile app, check the **IVR Phone Number** box.

4. If the Recipient has an alternate phone number, enter it in the **Secondary Phone** field.

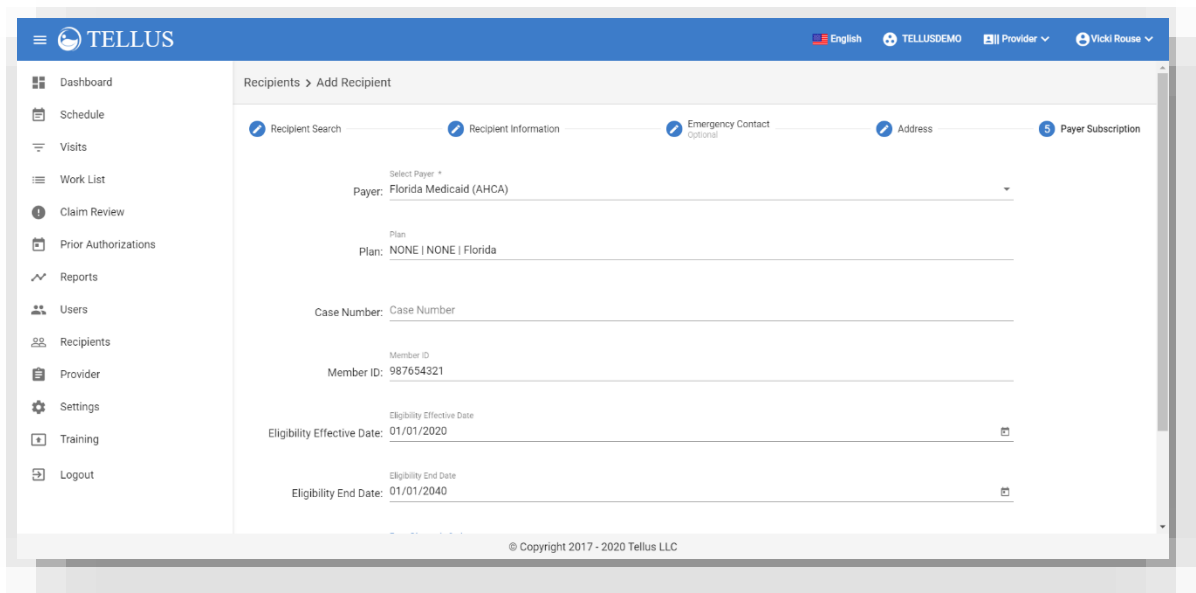
If your agency uses IVR instead of the Tellus EVV mobile app, check the **IVR Phone Number** box.

5. If this is the first address added for the Recipient, it will automatically be set to Primary. If you return to this Recipient later and [add more addresses](#), you will be able to toggle **Select as Primary** to the right (on) or left (off).

6. Click **Next** to move to the next step: Payer Subscription.

*Note: Remember, clicking **Next** does not save your entries. You will save at the last step, Payer Subscription. Do not use your browser's **Back** button; your entries will be lost.*

Entering Payer Subscription Information



The screenshot shows the 'Add Recipient' form in the TELLUS system. The 'Payer Subscription' step is highlighted with a blue circle and the number 5. The form contains the following fields:

- Payer:** Florida Medicaid (AHCA)
- Plan:** NONE | NONE | Florida
- Case Number:** Case Number
- Member ID:** 987654321
- Eligibility Effective Date:** 01/01/2020
- Eligibility End Date:** 01/01/2040

1. Enter the following Payer Subscription information.

- **Payer*:** Select the Payer from the drop-down menu.
- **Plan:** Click this field to see available plans and select the correct one. The plan has the Plan name, Program name and Jurisdiction.
- **Case Number:** Enter the case number.
- **Member ID:** Enter the Member's ID.
- **Eligibility Effective Date:** Enter the date that eligibility became effective.
- **Eligibility End Date:** Enter the date that eligibility ends.
- **Authorization Effective Date:** Enter the date that the prior authorization become effective.
- **Authorization End Date:** Enter the date that the prior authorizations ends.
- **Diagnosis Code:** Enter at least one diagnosis code.

2. Click **Save** to save the information.

At this step you can also chose to:

- Click **Back** at the bottom of the screen to go back to previous steps to make edits.

Do not use your browser's **Back** button. You will return to the Recipients page and all information will be lost.

- If you need to start over click **Reset** go back to step one of the Add New Recipient processes.

Note: If your agency requires a Referring Physician, you can link one to a Recipient by [Editing a Recipient](#) and [Entering a Referring Physician](#).

Related topics:

- [Searching for and Viewing Recipients](#)
- [Importing a Group of New Recipients](#)
- [Editing a Recipient](#)
- [Uploading Documents for a Recipient](#)
- [Deactivating a Recipient](#)
- [Activating an Inactive Recipient](#)

Importing a Group of New Recipients

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > Importing a Group of New Recipients

When you received the email with your logon credentials during the onboarding process for Tellus EVV, you should have received the Tellus EVV Recipient Upload Template spreadsheet and Tellus EVV Recipients Upload Instructions. You can use it to import a group of Recipients into Tellus EVV. To do so you will [complete](#) and [import](#) the spreadsheet; instructions follow.

Completing the Spreadsheet

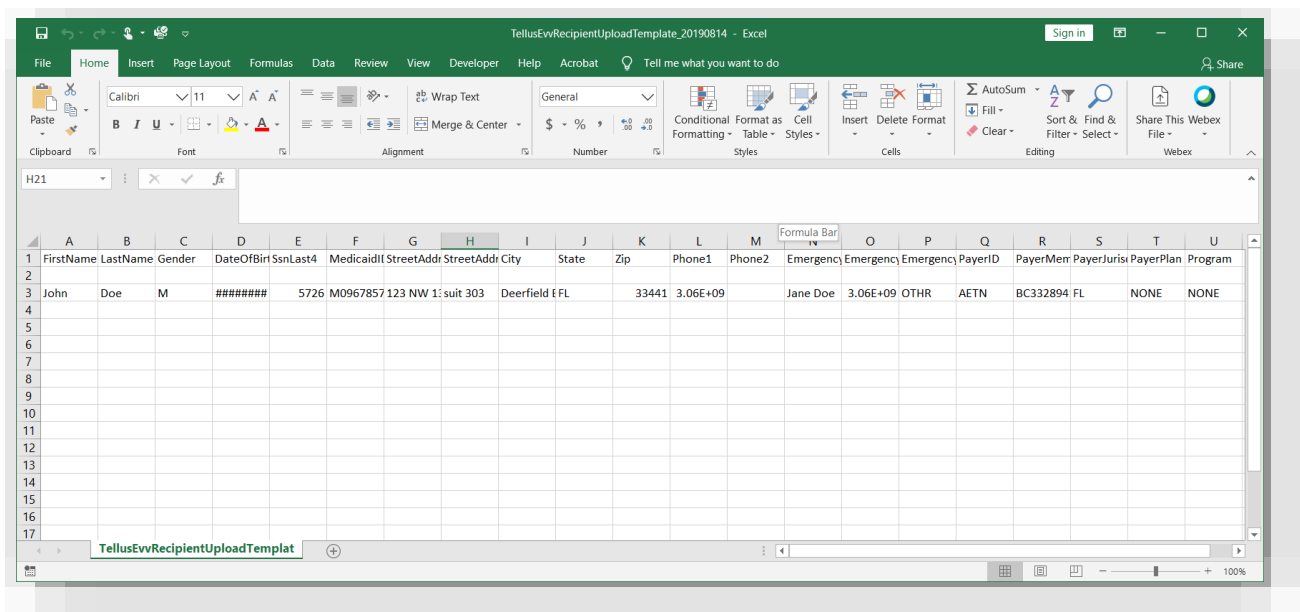
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Importing a Group of New Recipients](#) > Completing the Spreadsheet

When you open the spreadsheet, you will see that Line 2 is an example of how your entries should look; delete the example or type over the example entries following the instructions in Tellus EVV Recipients Upload Instructions.

Note: Commas are never allowed, even in fields that allow special characters.

When you save the spreadsheet, you may want to rename it so you keep the original template for future use.

The spreadsheet is formatted as a .csv (comma separated values) file. Do not change the format when saving.



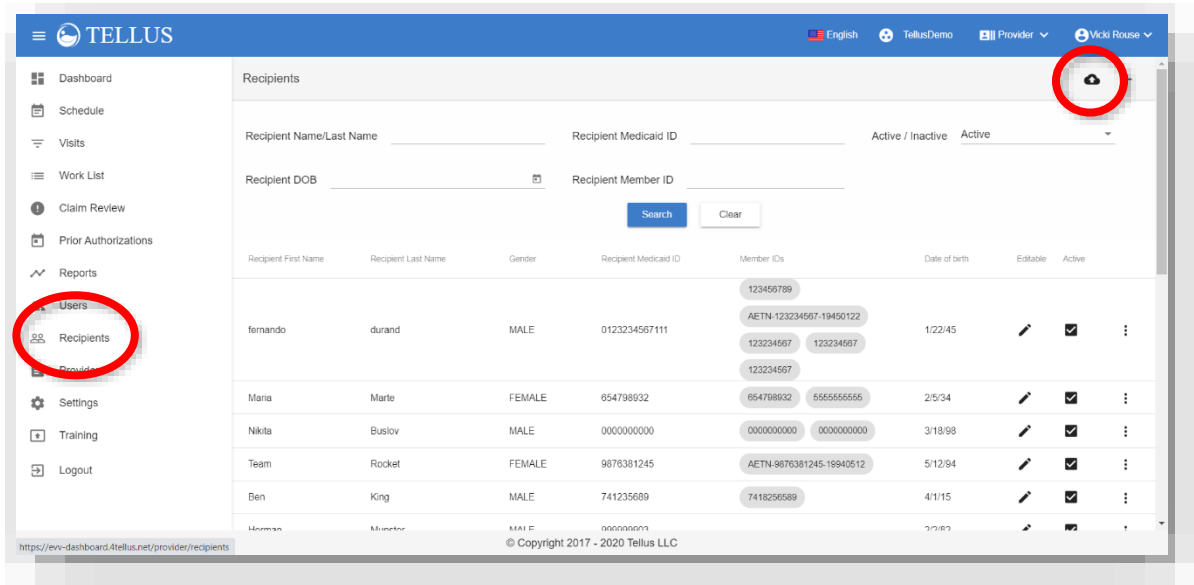
| 1 | FirstName | LastName | Gender | DateOfBirr | SsnLast4 | MedicaidI | StreetAddr | StreetAddr | City | State | Zip | Phone1 | Phone2 | Emergency | Emergency | Emergency | PayerID | PayerMemr | PayerJuris | PayerPlan | Program |
|----|-----------|----------|--------|------------|----------|-----------|--------------------|------------|-----------|-------|-------|----------|--------|-----------|-----------|-----------|---------|-----------|------------|-----------|---------|
| 2 | John | Doe | M | ##### | 5726 | M0967857 | 123 NW 1: suit 303 | | Deerfield | FL | 33441 | 3.06E+09 | | Jane Doe | 3.06E+09 | OTHR | AETN | BC332894 | FL | NONE | NONE |
| 3 | | | | | | | | | | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | | | | | | | | | | |
| 5 | | | | | | | | | | | | | | | | | | | | | |
| 6 | | | | | | | | | | | | | | | | | | | | | |
| 7 | | | | | | | | | | | | | | | | | | | | | |
| 8 | | | | | | | | | | | | | | | | | | | | | |
| 9 | | | | | | | | | | | | | | | | | | | | | |
| 10 | | | | | | | | | | | | | | | | | | | | | |
| 11 | | | | | | | | | | | | | | | | | | | | | |
| 12 | | | | | | | | | | | | | | | | | | | | | |
| 13 | | | | | | | | | | | | | | | | | | | | | |
| 14 | | | | | | | | | | | | | | | | | | | | | |
| 15 | | | | | | | | | | | | | | | | | | | | | |
| 16 | | | | | | | | | | | | | | | | | | | | | |
| 17 | | | | | | | | | | | | | | | | | | | | | |

Importing the Spreadsheet

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Importing a Group of New Recipients](#) > Importing the Spreadsheet

To import the spreadsheet:

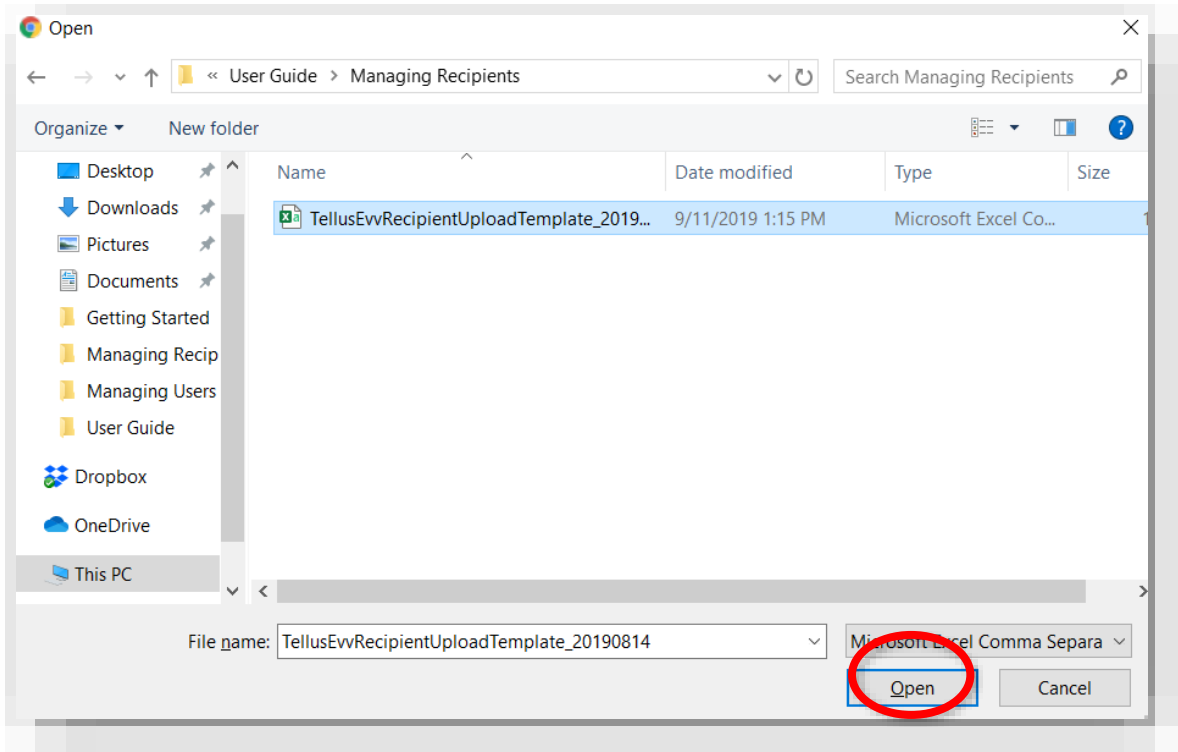
1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click the **Recipients** option to see the Recipients page.
3. Click the “cloud” icon in the upper right corner of the page.



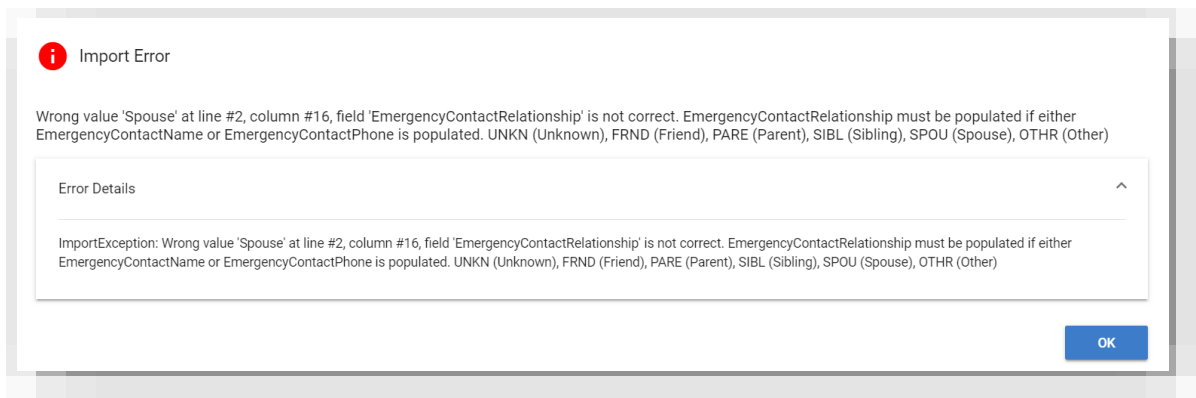
The screenshot shows the Tellus Recipients page. The sidebar on the left contains a menu with items: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients (circled in red), Provider, Settings, Training, and Logout. The main content area is titled 'Recipients' and features search filters for Recipient Name/Last Name, Recipient Medicaid ID, Recipient Member ID, and Recipient DOB. Below the filters is a table of recipients with columns for Recipient First Name, Recipient Last Name, Gender, Recipient Medicaid ID, Member IDs, Date of birth, Editable, and Active. The table lists several recipients, including fernando durand, Maria Martel, Nikita Buslov, Team Rocket, and Ben King. A 'cloud' icon in the top right corner of the page is circled in red.

| Recipient First Name | Recipient Last Name | Gender | Recipient Medicaid ID | Member IDs | Date of birth | Editable | Active |
|----------------------|---------------------|--------|-----------------------|--|---------------|----------|-------------------------------------|
| fernando | durand | MALE | 0123234567111 | 123456789 AETN-123234567-19450122 123234567 123234567 123234567 | 1/22/45 | | <input checked="" type="checkbox"/> |
| Maria | Martel | FEMALE | 6547098932 | 6547098932 5555555555 | 2/5/34 | | <input checked="" type="checkbox"/> |
| Nikita | Buslov | MALE | 0000000000 | 0000000000 0000000000 | 3/18/98 | | <input checked="" type="checkbox"/> |
| Team | Rocket | FEMALE | 9876381245 | AETN-9876381245-19940512 | 5/12/94 | | <input checked="" type="checkbox"/> |
| Ben | King | MALE | 741235609 | 741235609 | 4/1/15 | | <input checked="" type="checkbox"/> |

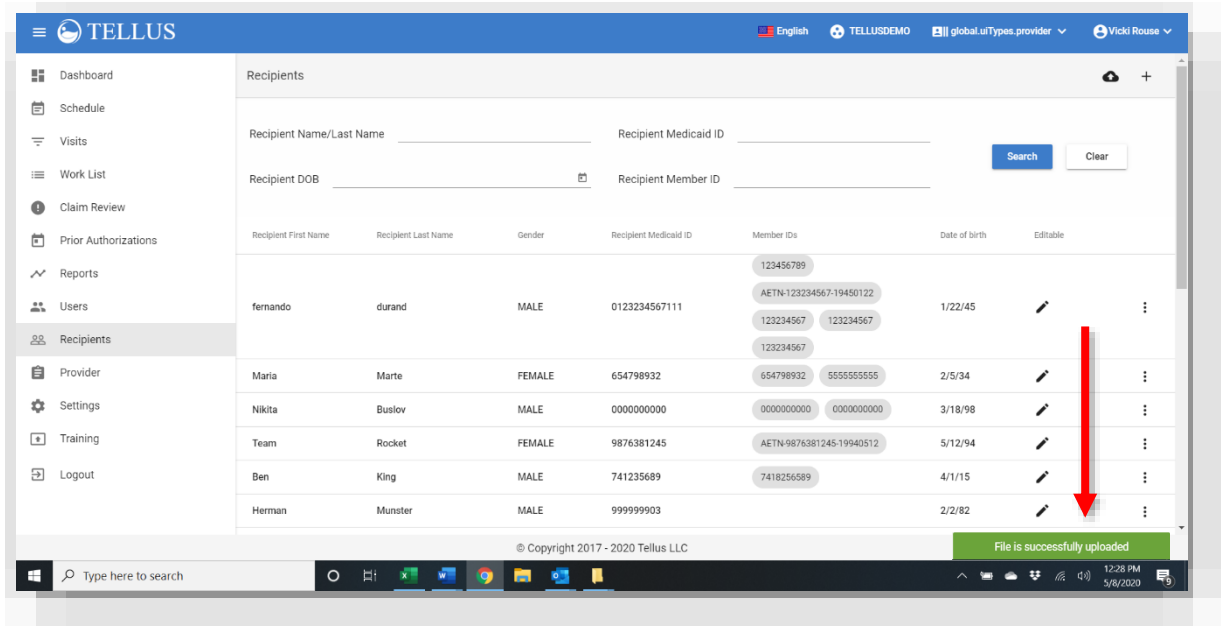
4. Find and select the file you want to upload.
5. Click **Open**.



If there are errors in the spreadsheet a window like the one below will give you information about where the error occurred and how to correct it. Click **OK** to close the error window.



- If your import is successful, a message will display at the bottom of the Recipient page.



Related topics:

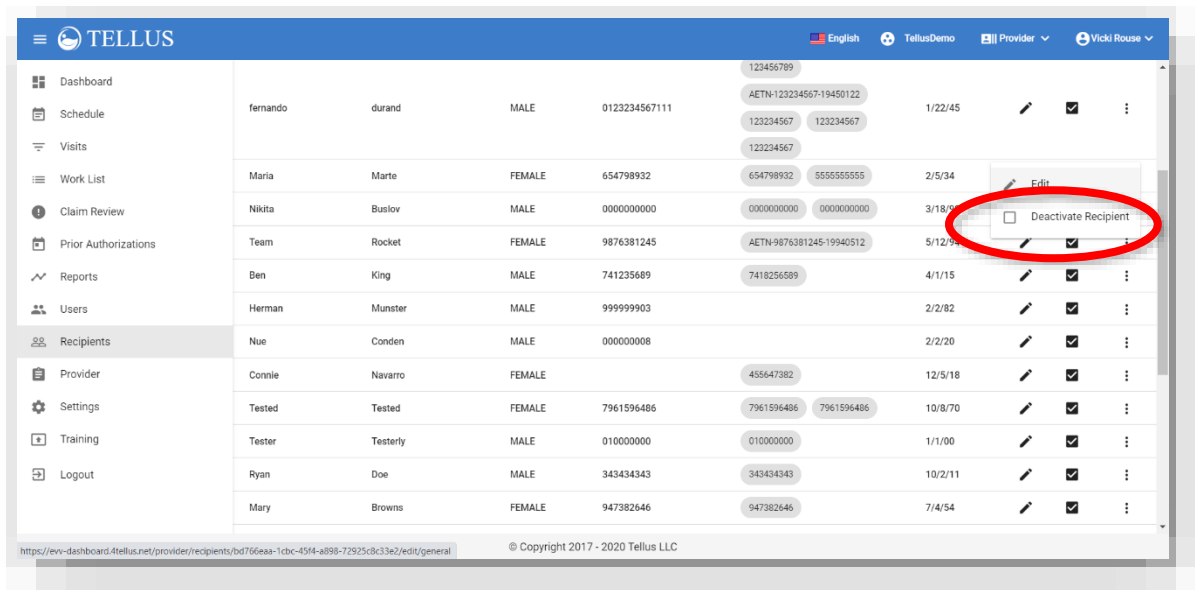
- [Searching for and Viewing Recipients](#)
- [Adding a New Recipient](#)
- [Editing a Recipient](#)
- [Uploading Documents for a Recipient](#)
- [Deactivating a Recipient](#)
- [Activating an Inactive Recipient](#)

Editing a Recipient

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > Editing a Recipient

Depending on the Payer and the Program, to update information for a Recipient:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click **Recipients** to see the Recipients page.
3. [Find the Recipient](#) whose information you want to change.
4. Click the submenu icon (vertical dots) and select **Edit**.



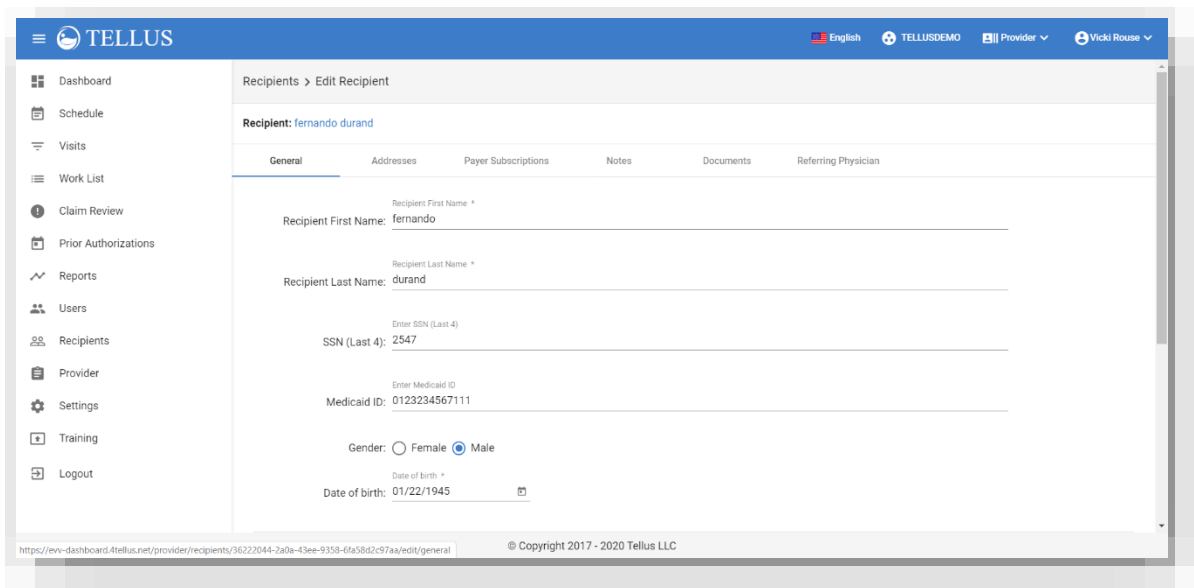
The screenshot shows the TELLUS web application interface. On the left is a navigation menu with options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main area displays a table of recipients. The table has columns for name, gender, and date. The 'Recipients' menu item is selected. In the table, the row for 'Nue Condén' has a vertical ellipsis menu icon to its right. A red circle highlights the 'Edit' option in this menu. Below the 'Edit' option, there is a checkbox labeled 'Deactivate Recipient'.

| Name | Gender | Date | Actions |
|-----------------|--------|---------------|---------------------|
| fernando durand | MALE | 0123234567111 | [Edit] [Deactivate] |
| Maria Marte | FEMALE | 654798932 | [Edit] [Deactivate] |
| Nikita Buslov | MALE | 0000000000 | [Edit] [Deactivate] |
| Team Rocket | FEMALE | 9876381245 | [Edit] [Deactivate] |
| Ben King | MALE | 741235689 | [Edit] [Deactivate] |
| Herman Munster | MALE | 999999903 | [Edit] [Deactivate] |
| Nue Condén | MALE | 000000008 | [Edit] [Deactivate] |
| Connie Navarro | FEMALE | 455647382 | [Edit] [Deactivate] |
| Tested Tested | FEMALE | 7961596486 | [Edit] [Deactivate] |
| Tester Testerly | MALE | 010000000 | [Edit] [Deactivate] |
| Ryan Doe | MALE | 343434343 | [Edit] [Deactivate] |
| Mary Browns | FEMALE | 947382646 | [Edit] [Deactivate] |

5. The **Edit Recipient** page displays the saved data for a Recipient. The following tabs can be reviewed or edited. Detailed instructions follow.

- **General**: includes all Recipient and emergency contact information
- **Addresses**: includes the Recipients primary address and any additional addresses that are on file. You can add more addresses for the Recipient on this tab.
- **Payer Subscriptions**: includes all payer information and eligibility dates. An additional field, **Jurisdiction**, also appears on this tab. Jurisdiction is associated with the Payer and Plan and indicates the area where the payer offers coverage.

- **Notes:** When a Caregiver or Provider enters notes using their mobile app during a visit, they will appear on the Notes tab. As an administrator, you can also enter notes on the Recipient Notes tab to keep on file; notes entered through the Administrator Console will not go to the mobile app.
- **Documents:** You can upload documents that you have created or scanned into your computer. Documents must be in PDF, .BMP, .JPEG format.
- **Referring Physician:** Allows you to enter and link a Referring Physician to a Recipient so it can be selected when a visit is scheduled.



The screenshot shows the TELLUS web application interface. The top navigation bar includes the TELLUS logo, language settings (English), user information (TELLUSDEMO), and provider information (Provider, Vicki Rouse). A left sidebar contains a menu with items: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area is titled 'Recipients > Edit Recipient' and shows the details for a recipient named 'fernando durand'. The form has several tabs: General, Addresses, Payer Subscriptions, Notes, Documents, and Referring Physician. The 'General' tab is active and contains the following fields:

- Recipient First Name: fernando
- Recipient Last Name: durand
- SSN (Last 4): 2547
- Medicaid ID: 0123234567111
- Gender: Female Male
- Date of birth: 01/22/1945

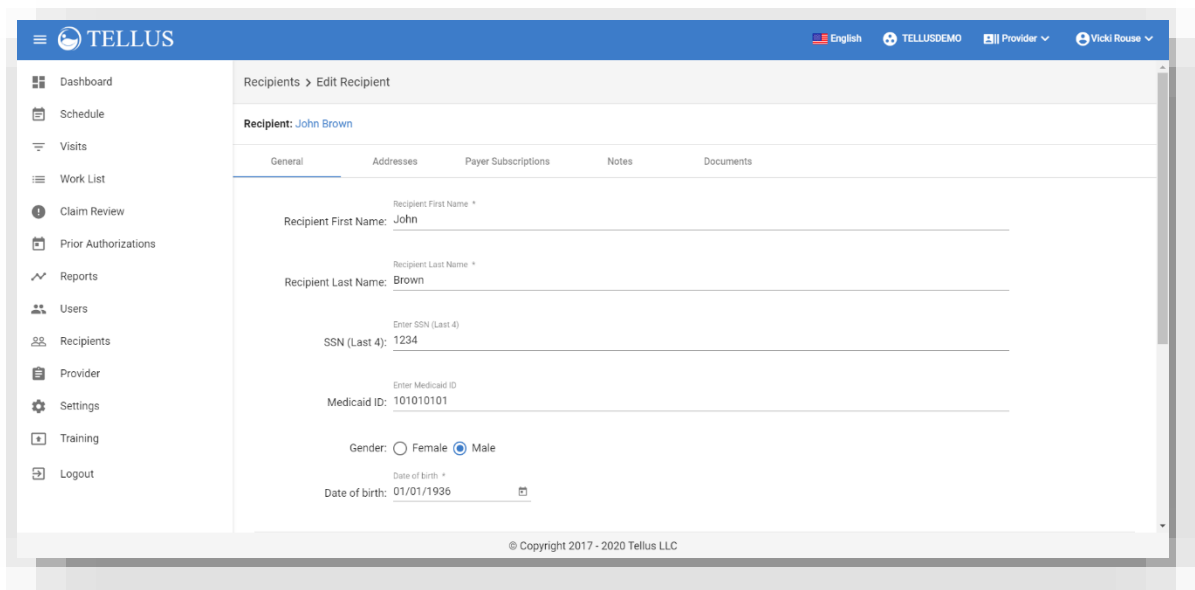
The URL at the bottom of the page is <https://evv--dashboard.tellus.net/provider/recipients/36222044-2a0a-43ee-9358-6fa58d2c97aa/edit/general> and the copyright notice is © Copyright 2017 - 2020 Tellus LLC.

Updating General Recipient Information

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Editing a Recipient](#) > Updating General Recipient Information

The General tab has all the Recipient's basic information as well as emergency contact information that you entered or imported.

1. Update information on this page as needed. If you need help with what to enter in each field, see [Adding Recipient Information](#) and [Entering Emergency Contact Information](#).
2. Scroll to the bottom of the page and click **Save** when you are finished updating, click **Reset** to clear your entries.



The screenshot displays the 'Edit Recipient' page in the Tellus EVV Administrator User Guide. The page is titled 'Recipients > Edit Recipient' and shows the recipient's name as 'John Brown'. The 'General' tab is selected, and the form contains the following fields:

- Recipient First Name: John
- Recipient Last Name: Brown
- SSN (Last 4): 1234
- Medicaid ID: 101010101
- Gender: Female Male
- Date of birth: 01/01/1936

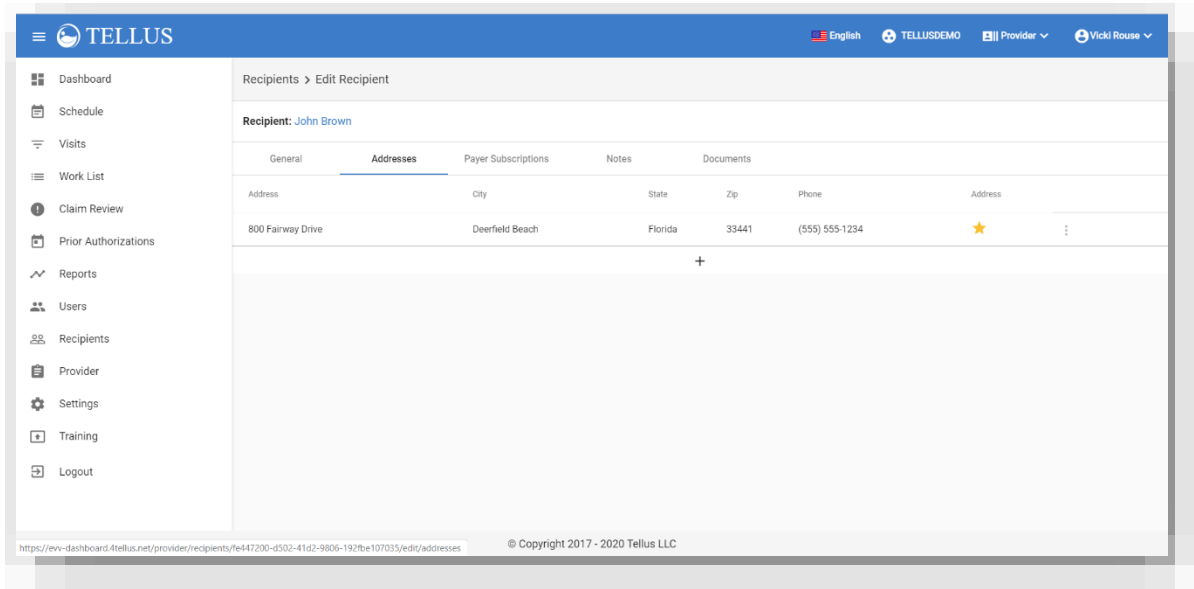
The page also includes a sidebar with navigation options such as Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The footer indicates '© Copyright 2017 - 2020 Tellus LLC'.

Updating Addresses

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Editing a Recipient](#) >

Updating Addresses

All addresses on file for the Recipient are listed on this page. The yellow star indicates the primary address.



Recipients > Edit Recipient

Recipient: John Brown

| General | Addresses | Payer Subscriptions | Notes | Documents | | | | | | | | | | | | |
|-------------------|--|---------------------|-------|----------------|---------|-------|---------|-------------------|-----------------|---------|-------|----------------|---|--|--|--|
| | <table border="1"><thead><tr><th>Address</th><th>City</th><th>State</th><th>Zip</th><th>Phone</th><th>Address</th></tr></thead><tbody><tr><td>800 Fairway Drive</td><td>Deerfield Beach</td><td>Florida</td><td>33441</td><td>(555) 555-1234</td><td>★</td></tr></tbody></table> | Address | City | State | Zip | Phone | Address | 800 Fairway Drive | Deerfield Beach | Florida | 33441 | (555) 555-1234 | ★ | | | |
| Address | City | State | Zip | Phone | Address | | | | | | | | | | | |
| 800 Fairway Drive | Deerfield Beach | Florida | 33441 | (555) 555-1234 | ★ | | | | | | | | | | | |

© Copyright 2017 - 2020 Tellus LLC

On this page you can:

- [Update an address](#)
- [Add a new address](#)
- [Delete an address](#)
- [Set an address as the primary address](#)

Updating an Address

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Editing a Recipient](#) > [Updating Addresses](#) > Updating an Address

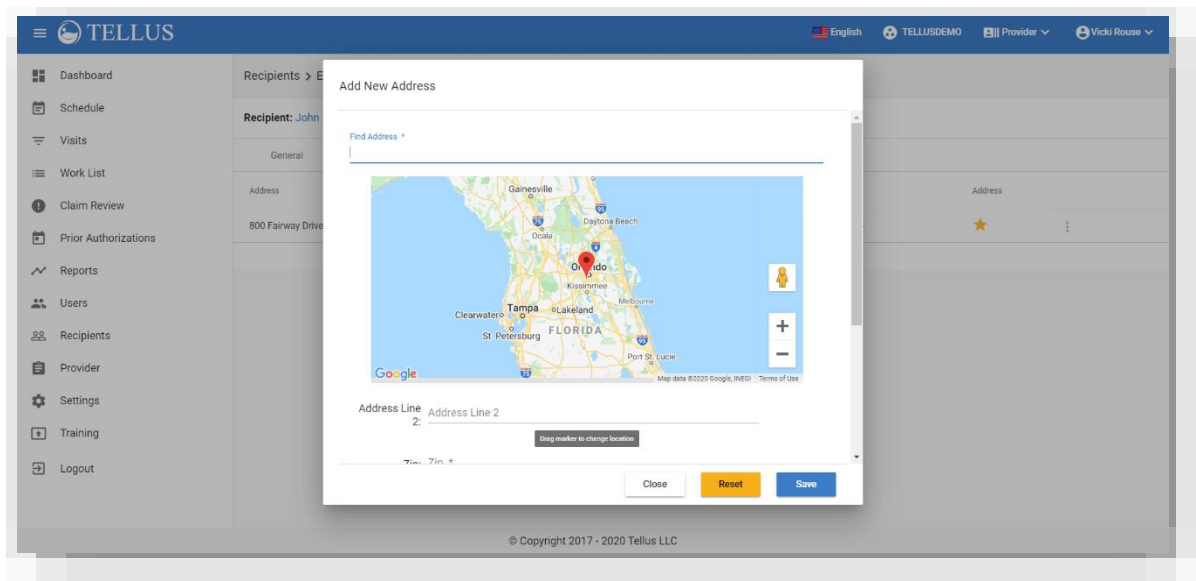
You cannot update an address, but you can [delete an address](#) and [add a new address](#). Instructions are in the sections that follow.

Adding a New Address

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Editing a Recipient](#) > [Updating Addresses](#) > Adding a New Address

To add a new address:

1. Click the “add new address” icon (plus sign) at the bottom of the list of addresses to open the Add New Address page.



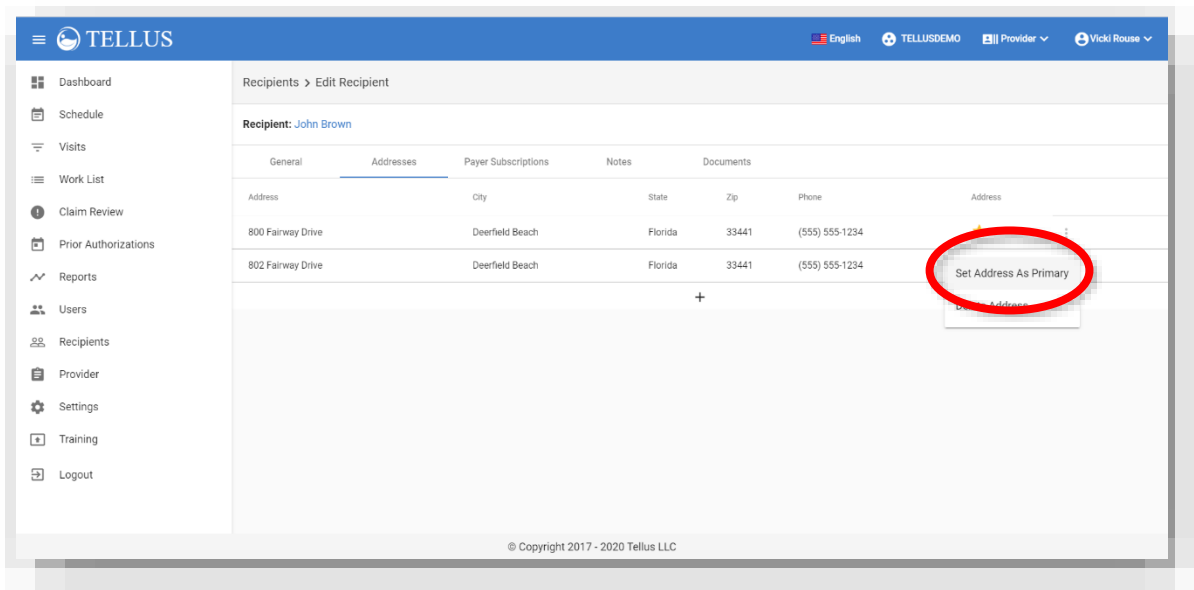
2. [Enter a new address](#) just as you did when you added the Recipient. Be sure to click **Save** when you finish making your entries, or, to clear your entries, click **Reset**.

Setting an Address as Primary

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Editing a Recipient](#) > [Updating Addresses](#) > Setting an Address as Primary

To set an address as the primary address for a Recipient:

1. Click the (vertical dots) for the address you want to set as primary.
2. Select **Set Address as Primary**.



The screenshot shows the Tellus EVV Administrator interface. The top navigation bar includes the Tellus logo, language settings (English), a user profile (TELLUSDEMO), and a provider dropdown (Vicki Rouse). The left sidebar contains a menu with options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area is titled 'Recipients > Edit Recipient' and shows details for 'Recipient: John Brown'. Below this, there are tabs for 'General', 'Addresses', 'Payer Subscriptions', 'Notes', and 'Documents'. The 'Addresses' tab is active, displaying a table with two address entries. The first entry is '800 Fairway Drive, Deerfield Beach, Florida, 33441, (555) 555-1234'. The second entry is '802 Fairway Drive, Deerfield Beach, Florida, 33441, (555) 555-1234'. A red circle highlights the 'Set Address As Primary' button next to the second address entry. A plus sign is visible below the table, indicating an option to add more addresses.

| Address | City | State | Zip | Phone | Address |
|-------------------|-----------------|---------|-------|----------------|------------------------|
| 800 Fairway Drive | Deerfield Beach | Florida | 33441 | (555) 555-1234 | |
| 802 Fairway Drive | Deerfield Beach | Florida | 33441 | (555) 555-1234 | Set Address As Primary |

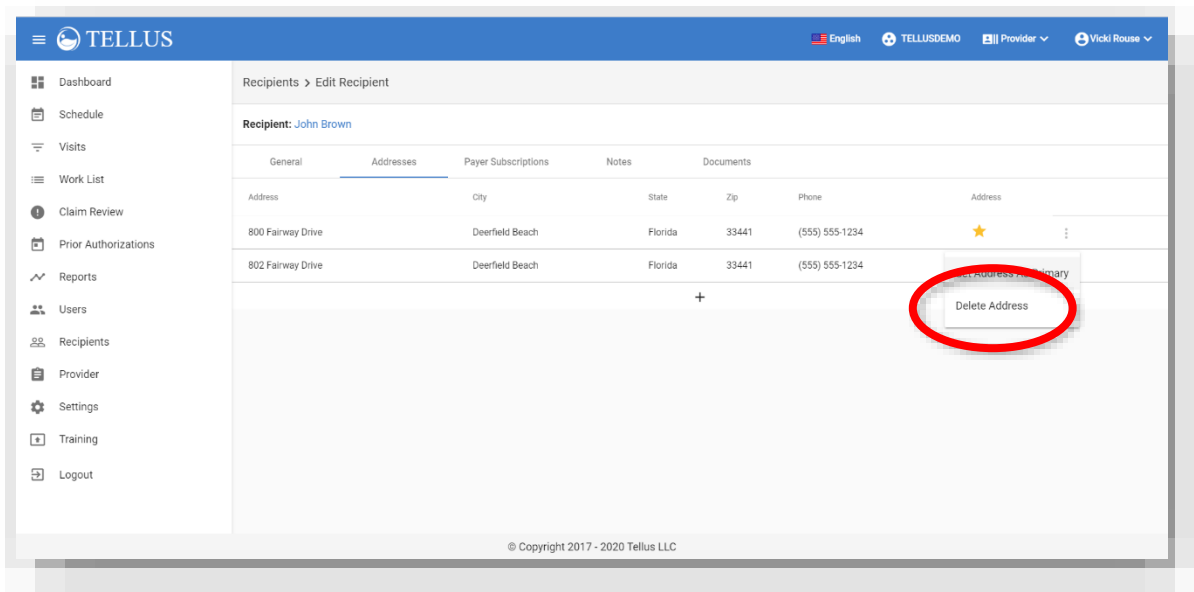
© Copyright 2017 - 2020 Tellus LLC

Deleting an Address

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Editing a Recipient](#) > [Updating Addresses](#) > Setting an Address as Primary

To delete an address:

1. Click the (vertical dots) for the address you want to delete.
2. Select **Delete Address**.



The screenshot shows the 'Recipients > Edit Recipient' page for 'John Brown'. The 'Addresses' tab is active, displaying a table with two address entries. The second entry, '802 Fairway Drive, Deerfield Beach, Florida, 33441, (555) 555-1234', has a vertical ellipsis menu icon to its right. A dropdown menu is open, showing the 'Delete Address' option circled in red. The interface includes a sidebar with navigation options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The top navigation bar shows 'English', 'TELLUSDEMO', 'Provider', and 'Vicki Rouse'.

Related topics:

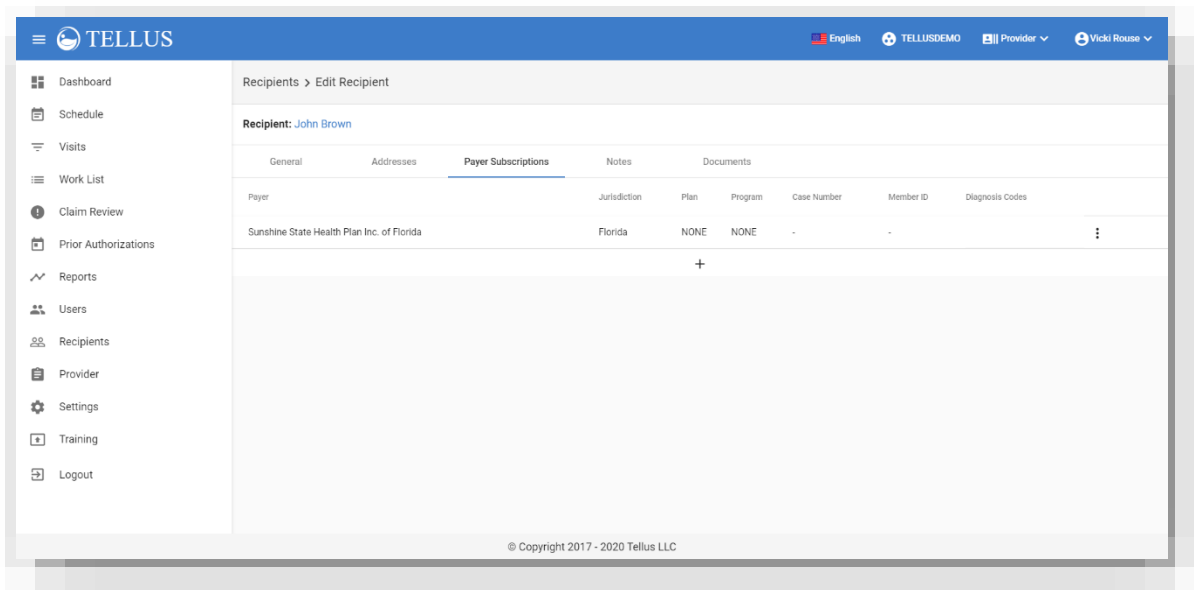
- [Searching for and Viewing Recipients](#)
- [Adding a New Recipient](#)
- [Importing a Group of New Recipients](#)
- [Editing a Recipient](#)
- [Uploading Documents for a Recipient](#)

Updating Payer Subscriptions (User to contact Tellus customer service)

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Editing a Recipient](#) > Updating Payer Subscriptions

The Payer tab lists all Payers or Health Plans on file for the Recipient. Here you can:

- [Add a new payer](#)
- [Delete a payer](#)



The screenshot displays the Tellus web application interface. The top navigation bar includes the Tellus logo, language settings (English), environment (TELLUSDEMO), provider selection (Provider), and user profile (Vicki Rouse). The left sidebar contains a menu with options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area is titled 'Recipients > Edit Recipient' and shows the recipient 'John Brown'. Below this, there are tabs for 'General', 'Addresses', 'Payer Subscriptions', 'Notes', and 'Documents'. The 'Payer Subscriptions' tab is active, displaying a table with the following data:

| Payer | Jurisdiction | Plan | Program | Case Number | Member ID | Diagnosis Codes |
|--|--------------|------|---------|-------------|-----------|-----------------|
| Sunshine State Health Plan Inc. of Florida | Florida | NONE | NONE | - | - | ⋮ |

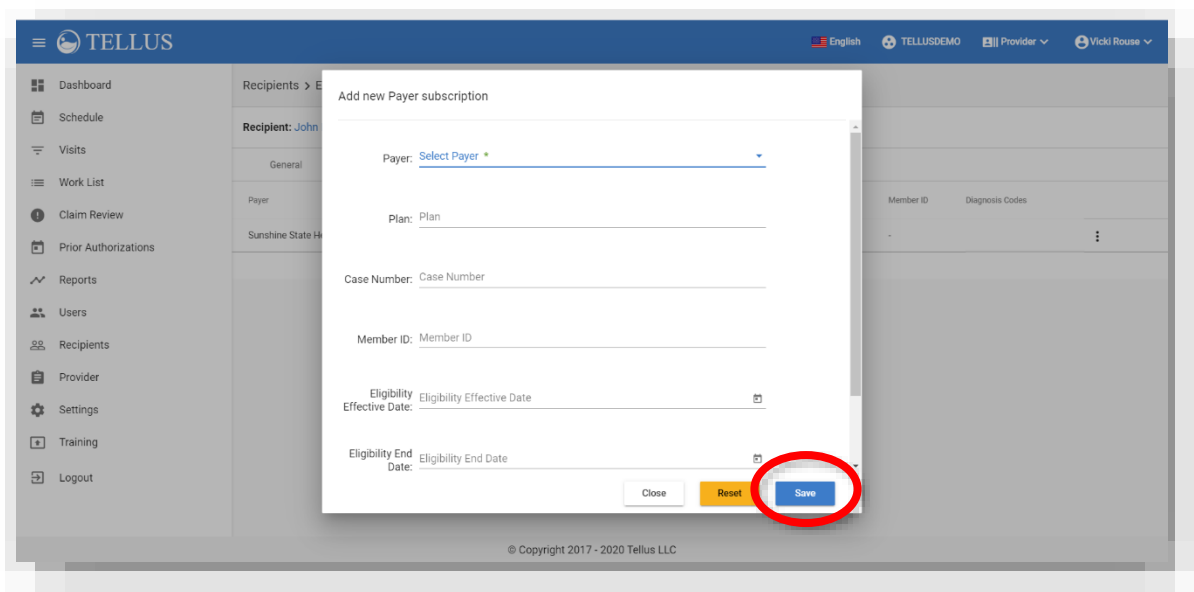
Below the table, there is a plus sign (+) indicating the option to add a new payer. The footer of the page reads '© Copyright 2017 - 2020 Tellus LLC'.

Adding a New Payer (User to contact Tellus customer service)

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Editing a Recipient](#) > [Updating Payer Subscriptions](#) > Adding a New Payer

To add a new Payer:

1. Click the “add new payer” icon (plus sign) at the bottom of the list of Payers to open the Add New Payer page. (If you need help with what to enter in payer fields for a Recipient, see [Entering Payer Subscription Information](#).)
2. Be sure to click **Save** when you finish making your entries, or, to clear your entries, click **Reset**.



The screenshot shows the 'Add new Payer subscription' form. The form is titled 'Add new Payer subscription' and is overlaid on a dashboard. The dashboard shows a recipient named 'John' with a 'Sunshine State H' provider. The form fields are:

- Payer: [Select Payer *](#)
- Plan: Plan
- Case Number: Case Number
- Member ID: Member ID
- Eligibility Effective Date: Eligibility Effective Date
- Eligibility End Date: Eligibility End Date

At the bottom of the form are three buttons: 'Close', 'Reset', and 'Save'. The 'Save' button is circled in red.

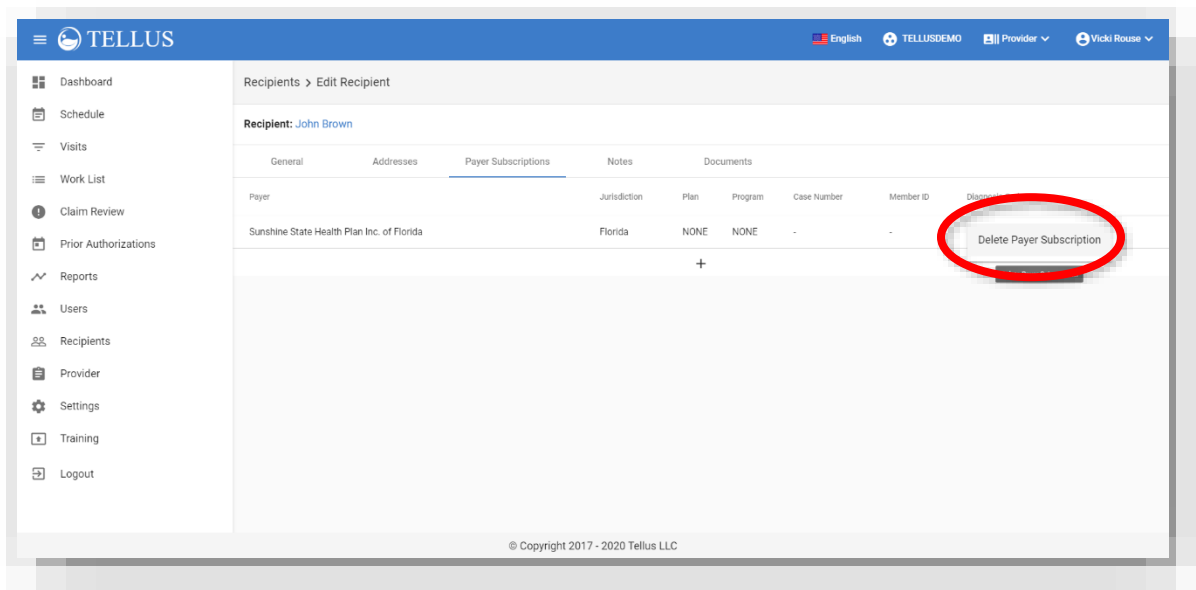
© Copyright 2017 - 2020 Tellus LLC

Deleting a Payer (User to contact Tellus customer service)

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Editing a Recipient](#) > [Updating Payer Subscriptions](#) > Deleting a New Payer

When a Payer is no longer authorized to bill Medicaid (for example, because they did not recertify) or if your agency no longer accepts a Payer, you can delete the Payer:

1. Click the submenu (vertical dots) for the payer you want to delete.
2. Click **Delete Payer Subscription**.



The screenshot displays the 'Recipients > Edit Recipient' page in the Tellus system. The recipient is identified as 'John Brown'. The 'Payer Subscriptions' tab is active, showing a table with columns for Payer, Jurisdiction, Plan, Program, Case Number, Member ID, and Actions. A single subscription is listed for 'Sunshine State Health Plan Inc. of Florida' in 'Florida' with 'NONE' for both Plan and Program. The 'Delete Payer Subscription' button in the Actions column is circled in red. A copyright notice '© Copyright 2017 - 2020 Tellus LLC' is visible at the bottom of the page.

| Payer | Jurisdiction | Plan | Program | Case Number | Member ID | Actions |
|--|--------------|------|---------|-------------|-----------|---------------------------|
| Sunshine State Health Plan Inc. of Florida | Florida | NONE | NONE | - | - | Delete Payer Subscription |

Entering Notes

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Editing a Recipient](#) >

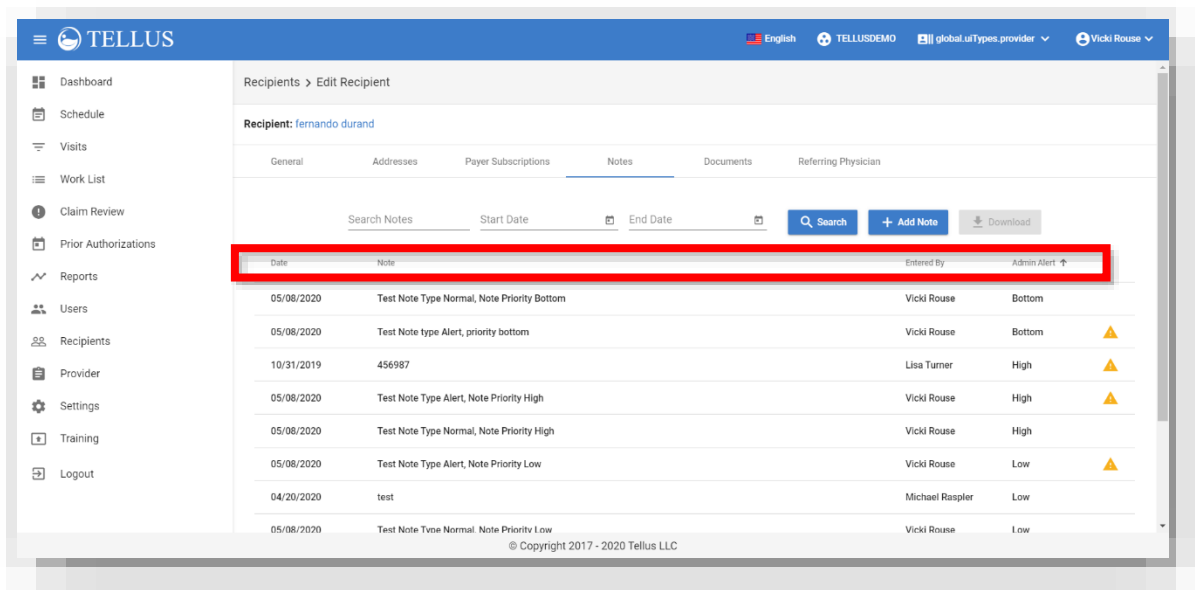
Entering Notes

The Notes tab allows you see all notes entered for a Recipient. Notes appear here if they are entered by a Caregiver using their mobile app during a visit, or if they are entered through the Administrator Console.

Note: Notes with a yellow triangle shown, like the one shown below, indicate the note was marked as “Alert My Administrator” when the Caregiver sent it from their mobile app or was marked as “Alert” Note Type when it was entered in the Administrator Console.



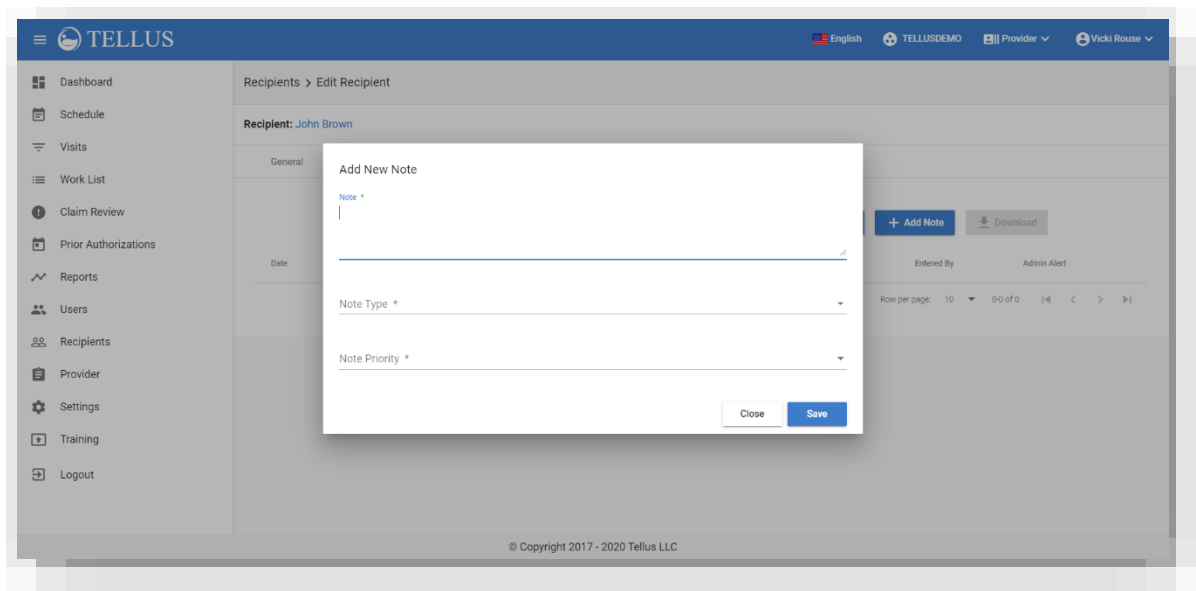
You can search notes by entering information you want to search in the **Search Notes** field or by entering a **Start Date** and **End Date**. You can sort notes by clicking any of the column headings, except Entered by.



| Date | Note | Entered By | Admin Alert |
|------------|---|-----------------|-------------|
| 05/08/2020 | Test Note Type Normal, Note Priority Bottom | Vicki Rouse | Bottom |
| 05/08/2020 | Test Note type Alert, priority bottom | Vicki Rouse | Bottom |
| 10/31/2019 | 456987 | Lisa Turner | High |
| 05/08/2020 | Test Note Type Alert, Note Priority High | Vicki Rouse | High |
| 05/08/2020 | Test Note Type Normal, Note Priority High | Vicki Rouse | High |
| 05/08/2020 | Test Note Type Alert, Note Priority Low | Vicki Rouse | Low |
| 04/20/2020 | test | Michael Raspler | Low |
| 05/08/2020 | Test Note Type Normal, Note Priority Low | Vicki Rouse | Low |

You can also add a note:

1. Click **+ Add Note**.



2. Enter your **Note** text.
3. Choose a **Note Type** (None, Alert, Normal).
If you select “Alert,” a yellow triangle, like the one shown below will appear to the right of the note.



4. Choose a **Note Priority** (None, Bottom, High, Low, Normal).

Your selection here will appear in the Note Priority column. When viewing notes for a Recipient, you can click that column heading to sort notes by Note Priority.

5. Click **Save**.

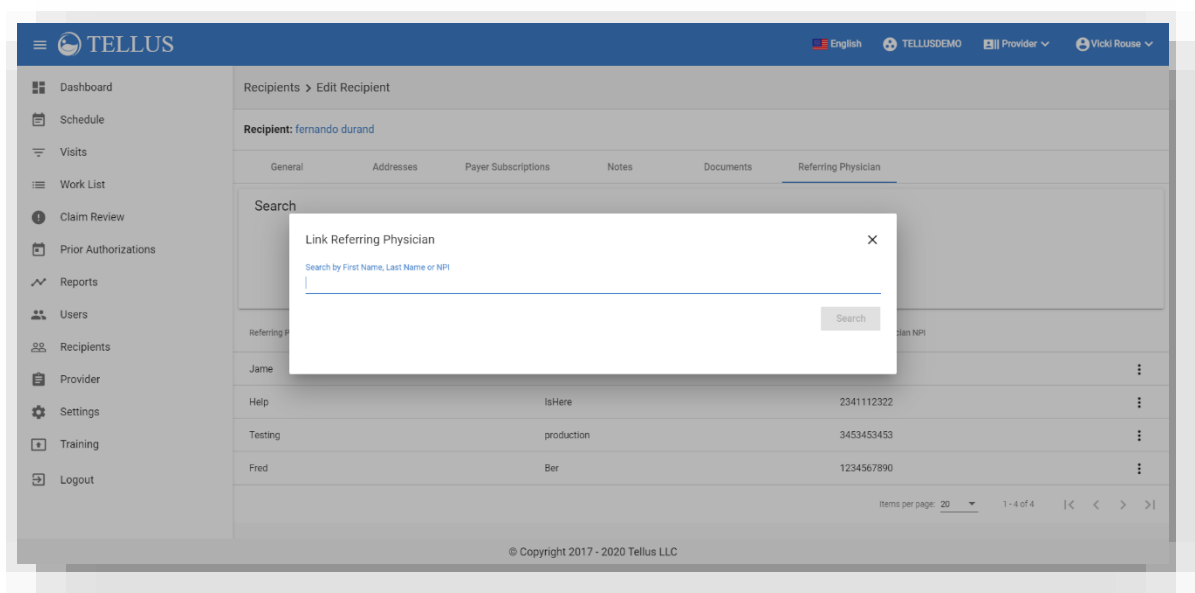
Entering a Referring Physician

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > [Editing a Recipient](#) > Entering a Referring Physician

If your agency requires a Referring Physician for visits, the **Referring Physicians** tab allows you select one or more Referring Physicians and link them to a Recipient.

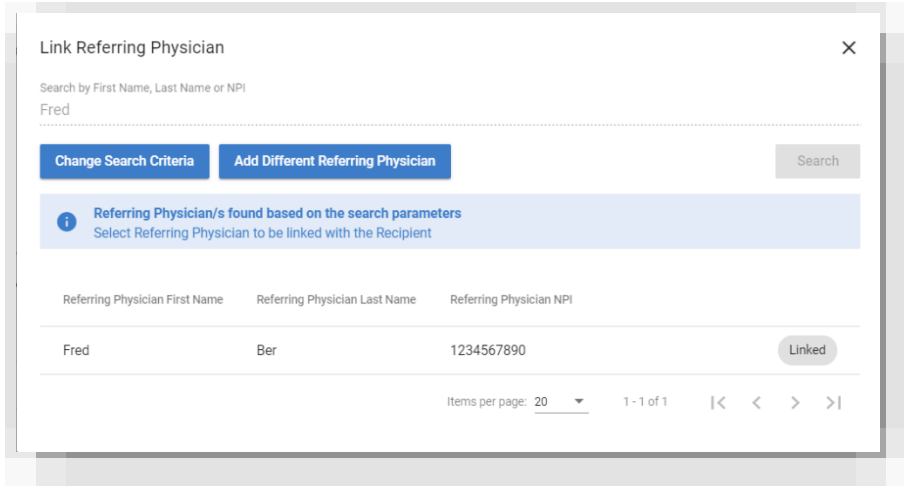
To add a Referring Physician:

1. Click + **Add Referring Physician**.



2. Enter all or part of a Referring Physician's name and then click **Search**.

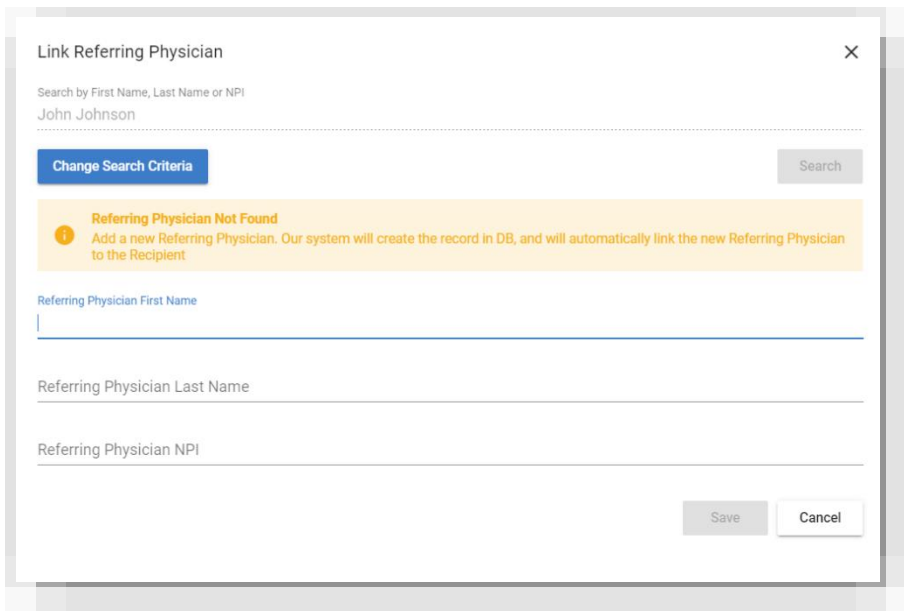
If the Referring Physician is found, this dialog box will display:



The screenshot shows a dialog box titled "Link Referring Physician" with a close button (X) in the top right corner. Below the title is a search input field with the text "Search by First Name, Last Name or NPI" and the search term "Fred". There are two buttons: "Change Search Criteria" and "Add Different Referring Physician", and a "Search" button. Below this is a blue information banner that reads: "Referring Physician/s found based on the search parameters. Select Referring Physician to be linked with the Recipient". Underneath is a table with three columns: "Referring Physician First Name", "Referring Physician Last Name", and "Referring Physician NPI". The table contains one row with the values "Fred", "Ber", and "1234567890". To the right of this row is a "Linked" button. At the bottom of the dialog, there is a pagination control showing "Items per page: 20" and "1 - 1 of 1" with navigation arrows.

You can click **Add Different Referring Physician** to add another Referring Physician to the Recipient. The Link Referring Physician dialog box below displays.

The Link Referring Physician dialog box will display automatically if the Referring Physician is not found.



The screenshot shows a dialog box titled "Link Referring Physician" with a close button (X) in the top right corner. Below the title is a search input field with the text "Search by First Name, Last Name or NPI" and the search term "John Johnson". There is a "Change Search Criteria" button and a "Search" button. Below this is a yellow information banner that reads: "Referring Physician Not Found. Add a new Referring Physician. Our system will create the record in DB, and will automatically link the new Referring Physician to the Recipient". Underneath are three input fields labeled "Referring Physician First Name", "Referring Physician Last Name", and "Referring Physician NPI". At the bottom right of the dialog are "Save" and "Cancel" buttons.

3. Enter the Referring Physician's first and last name and 10-digit NPI in the appropriate fields.
4. Click **Save**.

The Referring Physician is linked to the Recipient and can be selected when creating or scheduling a visit.

Related topics:

- [Searching for and Viewing Recipients](#)
- [Adding a New Recipient](#)
- [Importing a Group of New Recipients](#)
- [Uploading Documents for a Recipient](#)
- [Deactivating a Recipient](#)
- [Activating an Inactive Recipient](#)

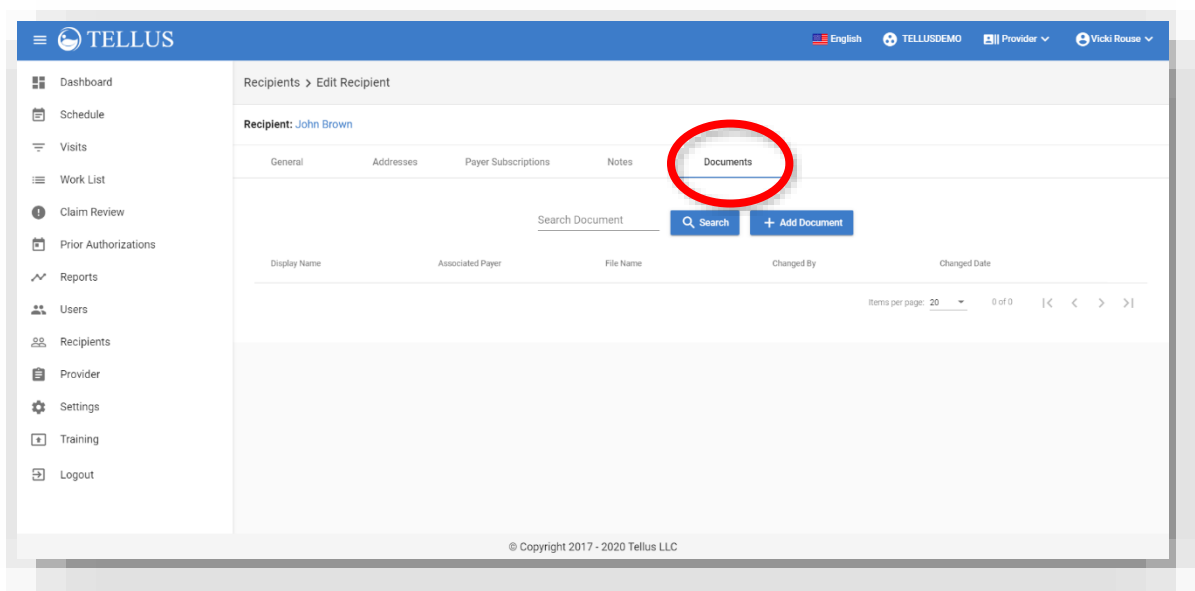
Uploading Documents for a Recipient

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > Uploading Documents for a Recipient

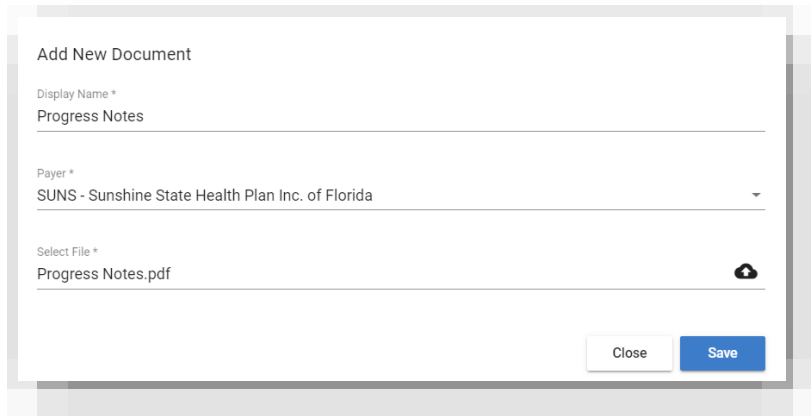
You can upload documents like progress notes or dietary instructions for a Recipient. Documents must be in PDF, .BMP, .JPEG format and maximum file size is 1Mb.

To upload a document:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click Recipients to see the **Recipients** page.
3. [Find the Recipient](#) for whom you want to upload documents.
4. Click the submenu icon (vertical dots) and select **Edit**.
5. Click the **Documents** tab.



6. Click **+ Add Document**.

A screenshot of a web application dialog box titled "Add New Document". It contains three input fields: "Display Name *" with the text "Progress Notes", "Payer *" with a dropdown menu showing "SUNS - Sunshine State Health Plan Inc. of Florida", and "Select File *" with the text "Progress Notes.pdf" and a cloud upload icon. At the bottom right, there are two buttons: "Close" and "Save".

7. In the Add New Document dialog enter a **Document Name**.
8. Use the dropdown list to select a **Payer**.
9. Click the “cloud” icon next to the **Select File** field to search for and select the file you want to upload.
10. When you return to the Add New Document dialog, click **Save**.

If you do not want to save the document you uploaded, click **Close**.

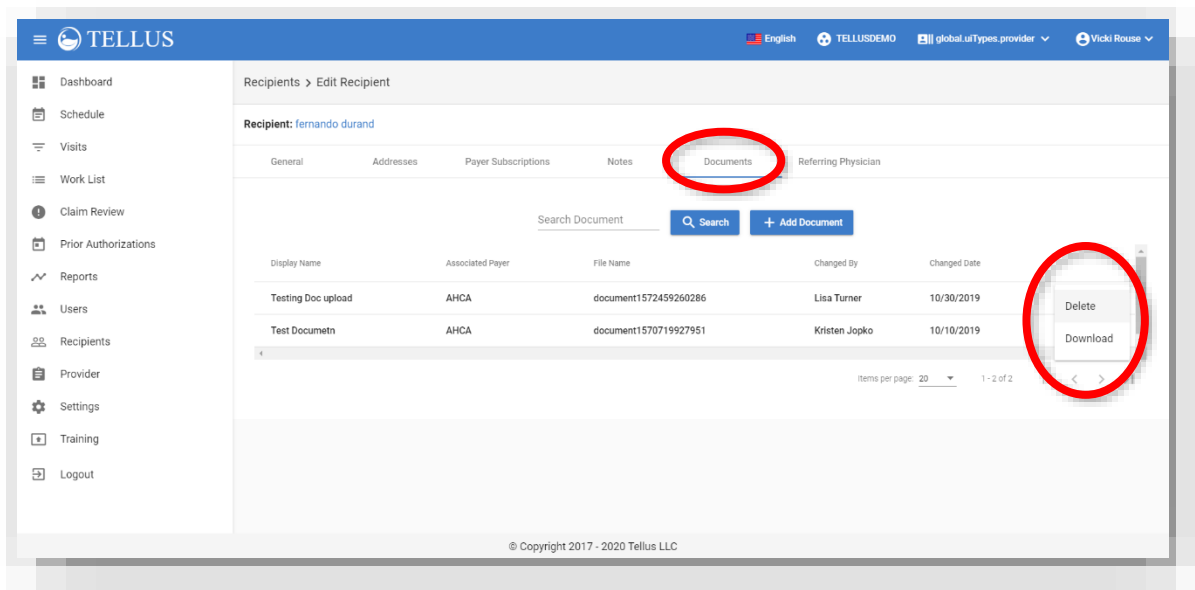
Related topics:

- [Searching for and Viewing Recipients](#)
- [Editing a Recipient](#)
- [Adding a New Recipient](#)
- [Importing a Group of New Recipients](#)

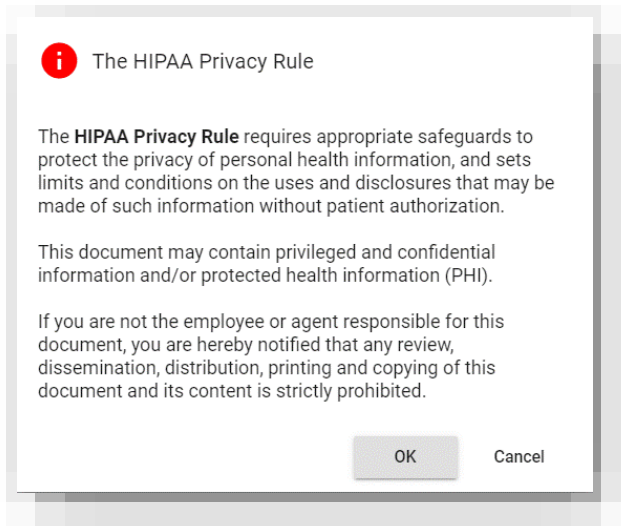
Managing Uploaded Document

You can delete or download documents for a Recipient.

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click Recipients to see the **Recipients** page.
3. [Find the Recipient](#) for whom you want to delete or download a document.
4. Click the submenu icon (vertical dots) and select **Edit**.
5. Click the **Documents** tab.



6. Find the document you want to work with and click the submenu icon (vertical dots).
7. Choose one of the following:
 - **Delete** allows you to remove the document.
 - **Download** allows you to download the document. The following HIPAA Privacy Rule screen will open; click **OK** to continue.



Related topics:

- [Searching for and Viewing Recipients](#)
- [Adding a New Recipient](#)
- [Importing a Group of New Recipients](#)
- [Editing a Recipient](#)
- [Deactivating a Recipient](#)
- [Activating an Inactive Recipient](#)

Deactivating a Recipient

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > Deactivating a Recipient

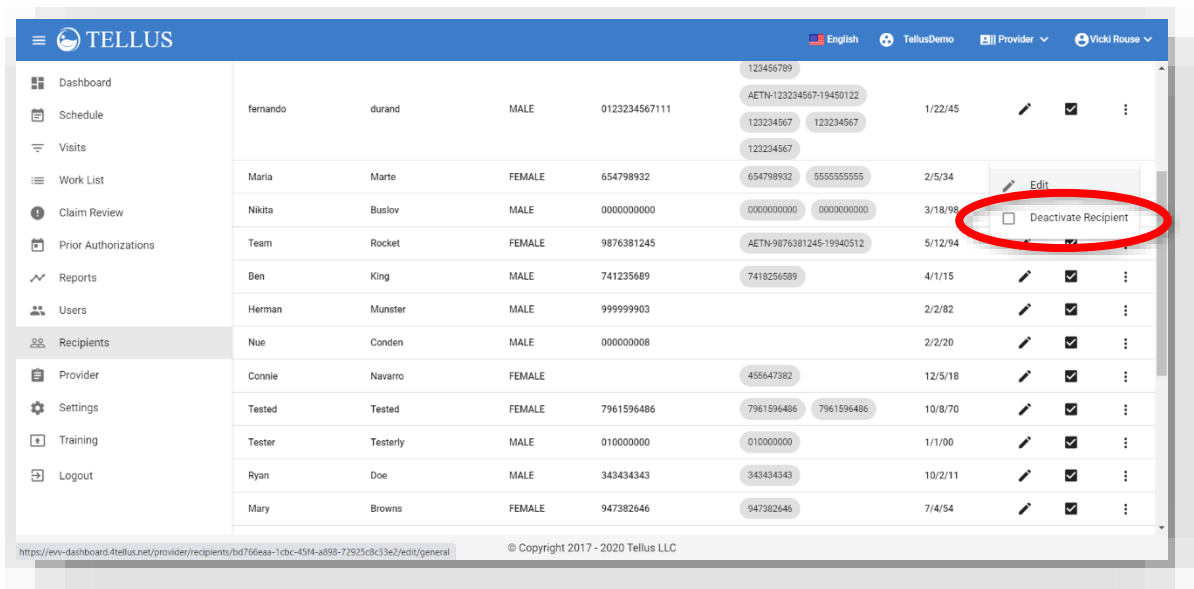
When Recipients are added to the Tellus EVV system they automatically have the status Active. You can deactivate Recipients who you no longer provide services for, who are no longer eligible for services, or who were entered under the wrong agency.

Deactivating a Recipient does not remove them from Tellus EVV; it simply hides the record from view. You can [activate inactive Recipients](#) at any time.

To deactivate a Recipient:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click **Recipients** to see the Recipients page.
3. [Find the Recipient](#) you want to deactivate.
4. Click the submenu icon (vertical dots) and click the **Deactivate Recipient** option.

The Recipient no longer appears in your Recipients list.



The screenshot shows the Tellus EVV Administrator interface. The left sidebar contains a navigation menu with options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients (selected), Provider, Settings, Training, and Logout. The main content area displays a table of recipients. The table has columns for Name, Gender, ID, and other details. The 'Recipients' section is active, and the 'Deactivate Recipient' option is highlighted with a red circle in the submenu.

| Name | Gender | ID | Other ID | Date | Actions |
|-----------------|--------|---------------|--------------------------|---------|---------------------|
| fernando durand | MALE | 0123234567111 | AETN-123234567-19450122 | 1/22/45 | [Edit] [Deactivate] |
| Maria Marte | FEMALE | 654798932 | 654798932 5555555555 | 2/5/34 | [Edit] [Deactivate] |
| Nikita Buslov | MALE | 0000000000 | 0000000000 0000000000 | 3/18/98 | [Edit] [Deactivate] |
| Team Rocket | FEMALE | 9876381245 | AETN-9876381245-19940512 | 5/12/94 | [Edit] [Deactivate] |
| Ben King | MALE | 741235689 | 7418256589 | 4/1/15 | [Edit] [Deactivate] |
| Herman Munster | MALE | 999999903 | | 2/2/82 | [Edit] [Deactivate] |
| Nue Conden | MALE | 000000008 | | 2/2/20 | [Edit] [Deactivate] |
| Connie Navarro | FEMALE | | 455647382 | 12/5/18 | [Edit] [Deactivate] |
| Tested Tested | FEMALE | 7961596486 | 7961596486 7961596486 | 10/8/70 | [Edit] [Deactivate] |
| Tester Testerly | MALE | 010000000 | 010000000 | 1/1/00 | [Edit] [Deactivate] |
| Ryan Doe | MALE | 343434343 | 343434343 | 10/2/11 | [Edit] [Deactivate] |
| Mary Browns | FEMALE | 947382646 | 947382646 | 7/4/54 | [Edit] [Deactivate] |

Related topics:

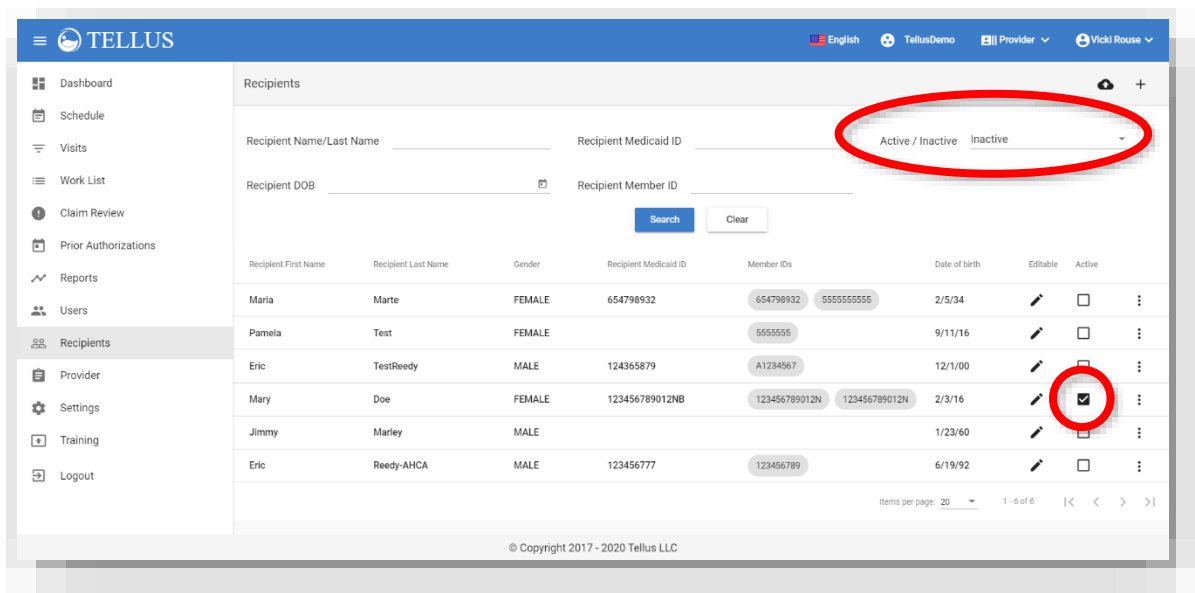
- [Searching for and Viewing Recipients](#)
- [Adding a New Recipient](#)
- [Importing a Group of New Recipients](#)
- [Editing a Recipient](#)
- [Uploading Documents for a Recipient](#)
- [Activating an Inactive Recipient](#)

Activating an Inactive Recipient

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Recipients](#) > Activating an Inactive Recipient

To activate an inactive Recipient:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click **Recipients** to see the Recipients page.
3. [Find the Recipient](#) you want to activate; be sure to select Inactive in the **Active/Inactive** field.



The screenshot shows the Tellus Recipients page. The top navigation bar includes the Tellus logo, language settings (English), user profile (Vicki Rouse), and provider information. The left sidebar contains a menu with options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area displays a list of recipients with columns for Recipient First Name, Recipient Last Name, Gender, Recipient Medicaid ID, Member IDs, Date of birth, Editable, and Active. The 'Active' column for the recipient 'Mary Doe' has a checked checkbox, which is circled in red. The 'Active / Inactive' dropdown menu at the top right of the search area is also circled in red, showing 'Inactive' selected.

| Recipient First Name | Recipient Last Name | Gender | Recipient Medicaid ID | Member IDs | Date of birth | Editable | Active |
|----------------------|---------------------|--------|-----------------------|-----------------------------|---------------|----------|-------------------------------------|
| Maria | Marte | FEMALE | 654798932 | 654798932 555555555 | 2/5/34 | | <input type="checkbox"/> |
| Pamela | Test | FEMALE | | 555555 | 9/11/16 | | <input type="checkbox"/> |
| Eric | TestReedy | MALE | 124355679 | A1234567 | 12/1/00 | | <input type="checkbox"/> |
| Mary | Doe | FEMALE | 123456789012NB | 123456789012N 123456789012N | 2/3/16 | | <input checked="" type="checkbox"/> |
| Jimmy | Marley | MALE | | | 1/23/60 | | <input type="checkbox"/> |
| Eric | Reedy-AHCA | MALE | 123456777 | 123456789 | 6/19/92 | | <input type="checkbox"/> |

4. Click the Active checkbox for the Recipient you want to activate.

Related topics:

- [Searching for and Viewing Recipients](#)
- [Adding a New Recipient](#)
- [Importing a Group of New Recipients](#)
- [Editing a Recipient](#)
- [Uploading Documents for a Recipient](#)
- [Deactivating a Recipient](#)

Managing Provider Agencies

You are here: [Tellus EVV Administrator User Guide](#) > Managing Provider Agencies

IMPORTANT: *In most cases, Provider Agencies and Payers (including service codes and payment rates) are uploaded to the Tellus EVV system and you will rarely have to perform the functions discussed in this section. Also, not all Provider Agencies are authorized to perform these functions. Contact Tellus Customer Support if you have questions **before** making changes in the system.*

Click a topic below:

[Searching for a Provider Agency](#)

[Updating Provider Agency Details](#)

[Managing Payers](#)

[Searching for a Payer](#)

[Assigning Tasks to a Payer Service Code](#)

[Manually Adding a New Task for a Payer Service Code](#)

[Deleting Manually Added Tasks for a Payer](#)

[Linking a Payer to a Provider](#)

[Deleting Payers](#)

[Managing Contractors](#)

[Searching for a Contractor](#)

[Linking a Provider to a Contractor](#)

[Deleting a Contractor](#)

[Managing Payer Override Rates](#)

[Searching for a Specific Payer Override Rate](#)

[Adding a Payer Override Rate](#)

[Updating a Payer Override Rate](#)

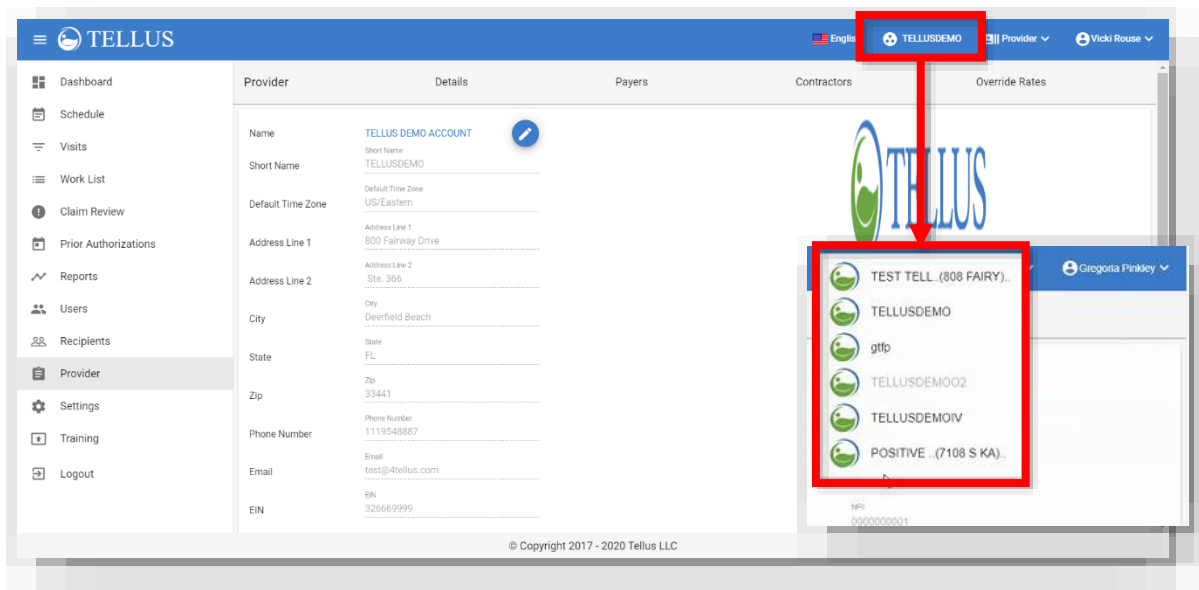
[Restoring a Payer Override Rate](#)

[Deleting a Payer Override Rate](#)

Searching for a Provider Agency

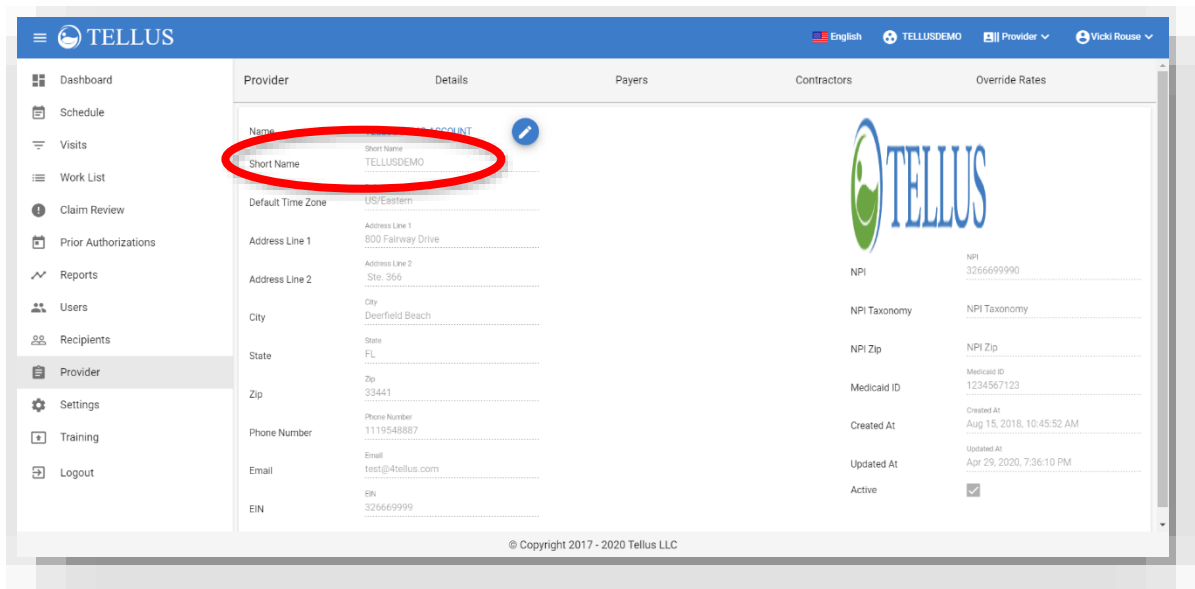
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > Searching for a Provider

If your Provider Agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies.



Select the one you want to work with; the **Provider Details** tab will open.

Note: The Provider Short Name is the name that displays in the dropdown list. Users can only see the Provider Agencies they have been invited to. See [Inviting an Existing User to your Agency](#).



Related Topics

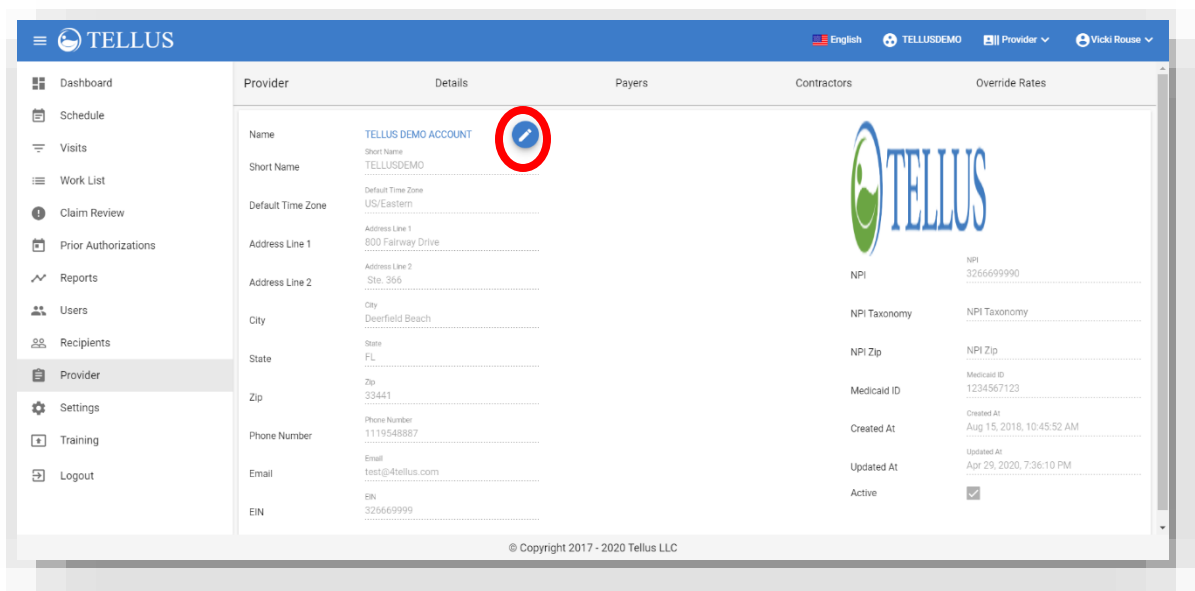
- [Updating Provider Agency Details](#)
- [Managing Payers](#)
- [Managing Contractors](#)
- [Overriding Payer Rates](#)

Updating Provider Agency Details

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > Updating Provider Agency Details

To update a Provider Agency's details:

1. If your Provider Agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option; the page opens to the **Details** tab.

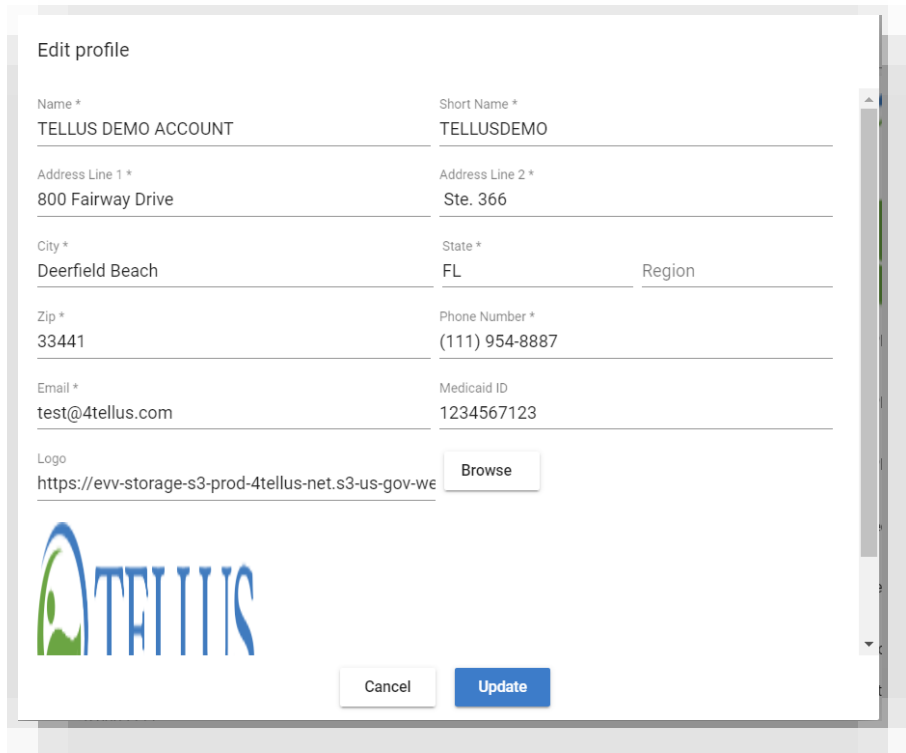


The screenshot displays the Tellus EVV Administrator User Guide interface. The top navigation bar includes the Tellus logo, language settings (English), user information (TELLUSDEMO), and a dropdown menu for the current provider (Vicki Rouse). The left sidebar contains a main menu with options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider (selected), Settings, Training, and Logout. The main content area is titled 'Provider Details' and shows the following information:

| Field | Value |
|-------------------|-------------------------------------|
| Name | TELLUS DEMO ACCOUNT |
| Short Name | TELLUSDEMO |
| Default Time Zone | US/Eastern |
| Address Line 1 | 800 Fairway Drive |
| Address Line 2 | Ste. 366 |
| City | Deerfield Beach |
| State | FL |
| Zip | 33441 |
| Phone Number | 119548887 |
| Email | test@4tellus.com |
| EIN | 326669999 |
| NPI | 3266699990 |
| NPI Taxonomy | NPI Taxonomy |
| NPI Zip | NPI Zip |
| Medicaid ID | 1234567123 |
| Created At | Aug 15, 2018, 10:45:52 AM |
| Updated At | Apr 29, 2020, 7:36:10 PM |
| Active | <input checked="" type="checkbox"/> |

© Copyright 2017 - 2020 Tellus LLC

- Click the “pencil icon” to open the **Edit Profile** dialog box.



Edit profile

| | | | |
|------------------|---|------------------|----------------|
| Name * | TELLUS DEMO ACCOUNT | Short Name * | TELLUSDEMO |
| Address Line 1 * | 800 Fairway Drive | Address Line 2 * | Ste. 366 |
| City * | Deerfield Beach | State * | FL |
| | | Region | |
| Zip * | 33441 | Phone Number * | (111) 954-8887 |
| Email * | test@4tellus.com | Medicaid ID | 1234567123 |
| Logo | <input type="text" value="https://evv-storage-s3-prod-4tellus-net.s3-us-gov-we"/> <input type="button" value="Browse"/> | | |

- Enter new information as needed.
- Click **Update** to save your entries; click **Cancel** if you do not want to save your changes.

Either way, you return to the **Details** tab.

Related Topics

- [Searching for a Provider Agency](#)
- [Managing Contractors](#)
- [Managing Payers](#)
- [Overriding Payer Rates](#)

Managing Payers

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > Managing Payers

In this section you will find information about:

- [Searching for a Payer](#)
- [Activating and Deactivating Tasks for a Payer](#)
- [Manually Adding a New Task for a Payer](#)
- [Deleting Manually Added Tasks for a Payer](#)
- [Linking Provider to Payers](#)
- [Deleting Payers](#)

Note: Not all agencies are authorized to add, link, or delete Payers.

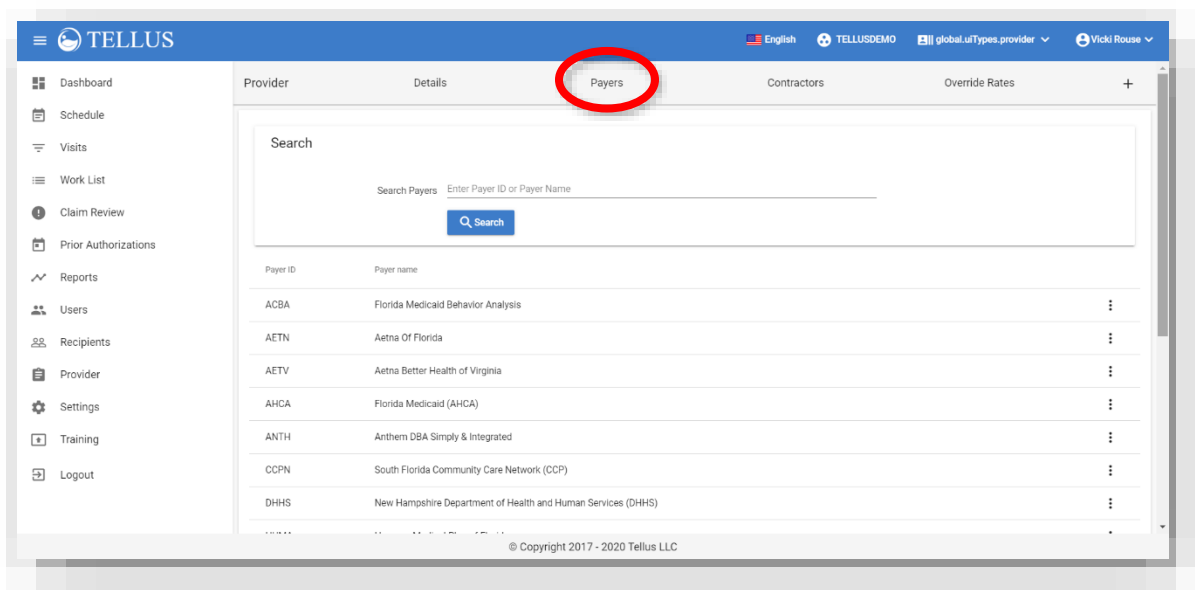
Note: Contracts are not currently used.

Searching for a Payer

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Payers](#) > Searching for a Payer

To search for a Payer:

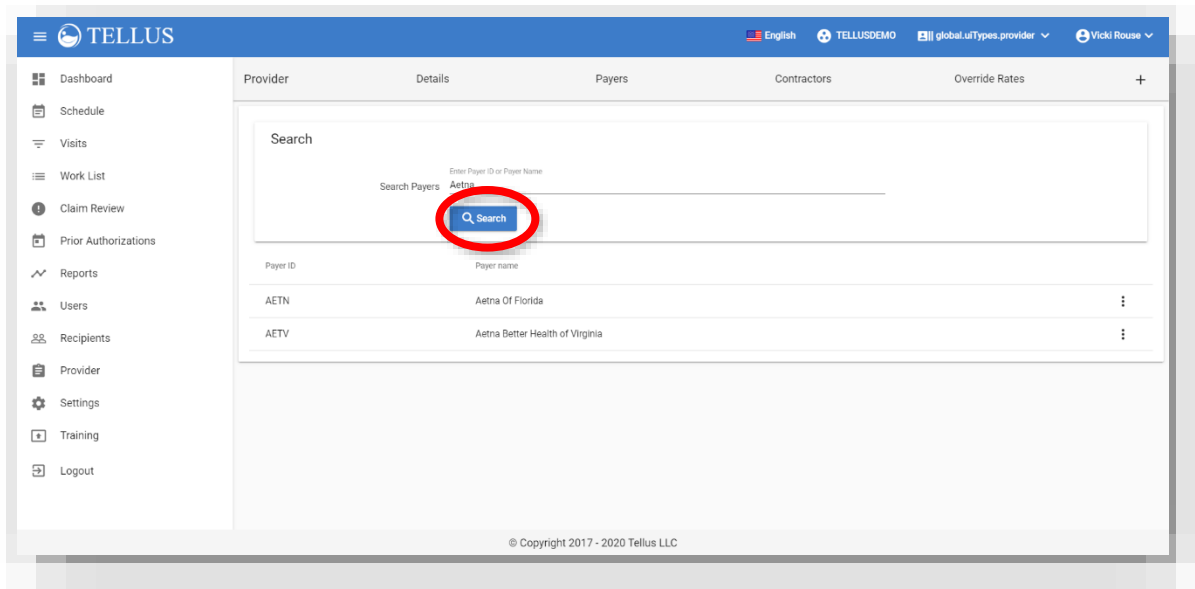
1. If your Provider Agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Payers** tab to see the Payers associated with the Provider.



The screenshot shows the Tellus EVV Administrator User Guide interface. The main menu is expanded, and the 'Payers' tab is highlighted with a red circle. The interface displays a search field for Payers and a table of Payers.

| Payer ID | Payer name | |
|----------|--|---|
| ACBA | Florida Medicaid Behavior Analysis | ⋮ |
| AETN | Aetna Of Florida | ⋮ |
| AETV | Aetna Better Health of Virginia | ⋮ |
| AHCA | Florida Medicaid (AHCA) | ⋮ |
| ANTH | Anthem DBA Simply & Integrated | ⋮ |
| CCPN | South Florida Community Care Network (CCP) | ⋮ |
| DHHS | New Hampshire Department of Health and Human Services (DHHS) | ⋮ |

5. Enter all or part of the Payer name in the **Search Payer** field.



The screenshot shows the TELLUS web application interface. The top navigation bar includes the TELLUS logo, language settings (English), environment (TELLUSDEMO), user profile (global.userInfo.provider), and user name (Vicki Rouse). The main content area is titled "Provider" and contains a "Search" section. A search input field is labeled "Search Payers" and contains the text "Aetna". A red circle highlights the "Search" button. Below the search field, a table displays the search results:

| Payer ID | Payer name | |
|----------|---------------------------------|---|
| AETN | Aetna Of Florida | ⋮ |
| AETV | Aetna Better Health of Virginia | ⋮ |

© Copyright 2017 - 2020 Tellus LLC

6. Click **Search**.

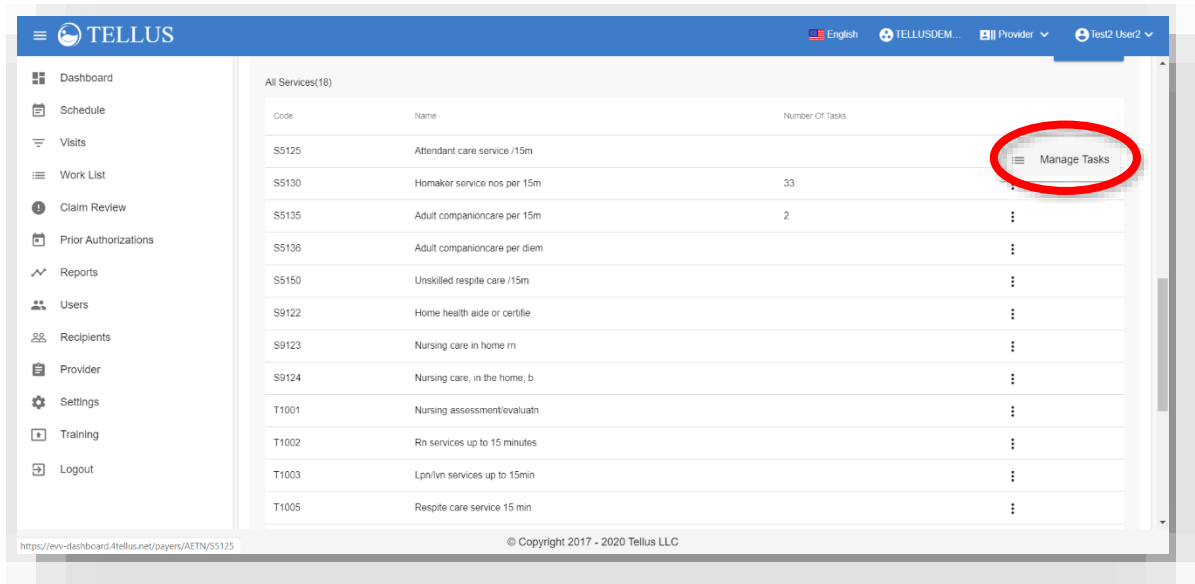
Assigning Tasks to a Payer Service Code

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Payers](#) > Assigning a Task to a Payer Service Code

Tasks are part of the Provider/Payer information that is uploaded to the Tellus EVV system. Generally, you will not have to change this information, but on occasion a Payer may allow new services or discontinue others.

On the **Payers** tab, you can activate and deactivate tasks that a Payer is authorized to provide to Recipients.

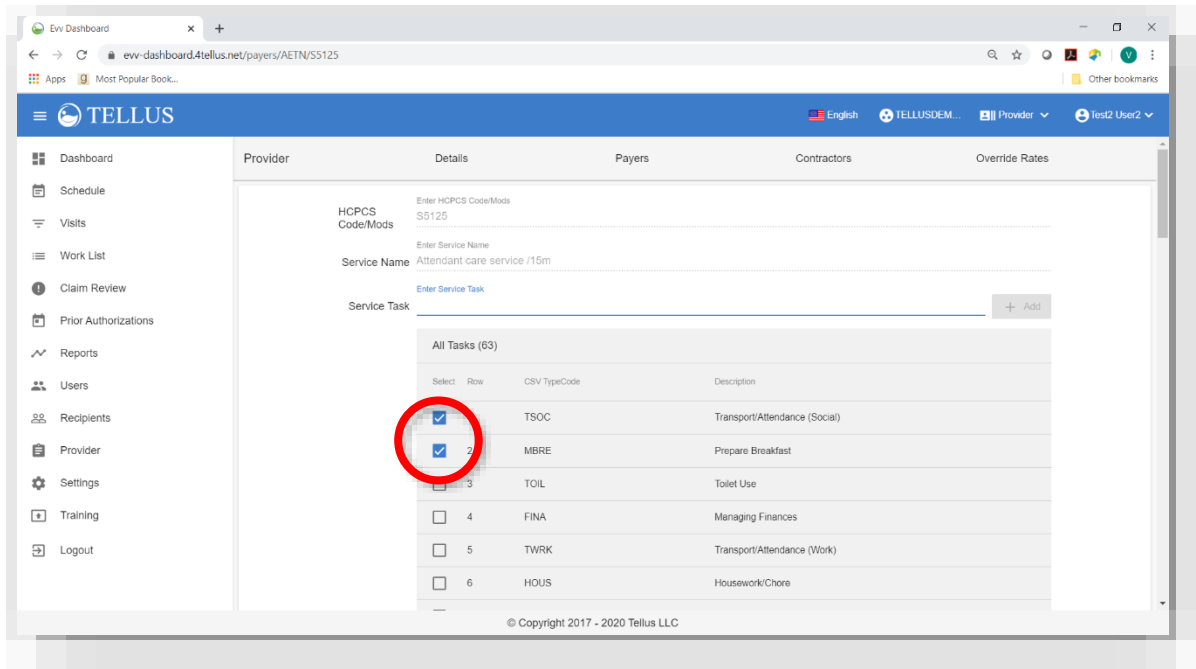
1. If your Provider Agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Payers** tab.
5. [Find the Payer](#) you want to whose tasks you need to change.
6. Find the task you want to update.
7. Click the submenu (vertical dots) and select **Manage Tasks**.



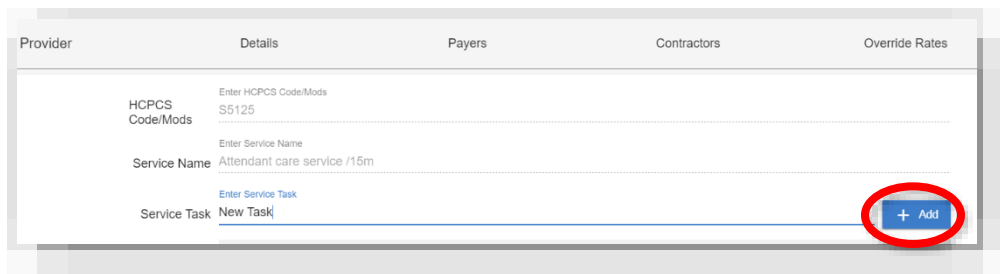
The screenshot shows the Tellus EVV Administrator User Guide interface. The top navigation bar includes the Tellus logo, language settings (English), user information (TELLUSDEM...), provider selection (Provider), and user selection (Test2 User2). The left sidebar contains a main menu with options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area displays a table titled 'All Services(18)' with columns for Code, Name, and Number Of Tasks. The table lists various services such as 'Attendant care service /15m', 'Homemaker service nos per 15m', 'Adult companioncare per 15m', etc. A red circle highlights the 'Manage Tasks' option in the submenu of the first row.

| Code | Name | Number Of Tasks | |
|-------|-------------------------------|-----------------|---|
| S5125 | Attendant care service /15m | | ⋮ |
| S5130 | Homemaker service nos per 15m | 33 | ⋮ |
| S5135 | Adult companioncare per 15m | 2 | ⋮ |
| S5136 | Adult companioncare per diem | | ⋮ |
| S5150 | Unskilled respite care /15m | | ⋮ |
| S9122 | Home health aide or certifie | | ⋮ |
| S9123 | Nursing care in home rn | | ⋮ |
| S9124 | Nursing care, in the home, b | | ⋮ |
| T1001 | Nursing assessment/evaluath | | ⋮ |
| T1002 | Rn services up to 15 minutes | | ⋮ |
| T1003 | Lpn/lvn services up to 15min | | ⋮ |
| T1005 | Respite care service 15 min | | ⋮ |

8. When the task page opens, check the tasks that the Payer allows to be provided to Recipients; uncheck those that the Payer does not allow.

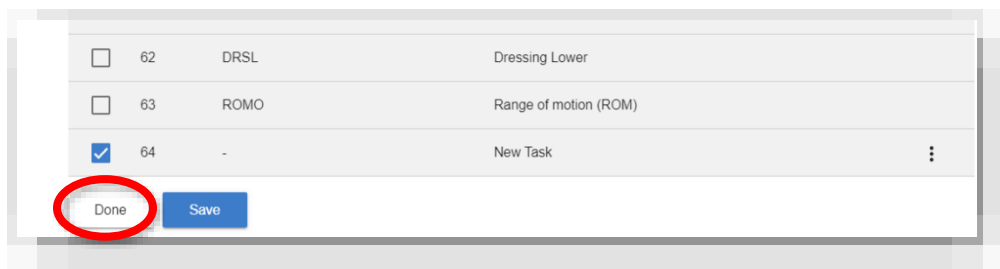


9. To add a new task, enter the task name in the Service Task field and then click **+ Add**.



10. The new task is added to the bottom of the list; be sure to check the new task.

11. Scroll to the bottom of the page and click **Done**.

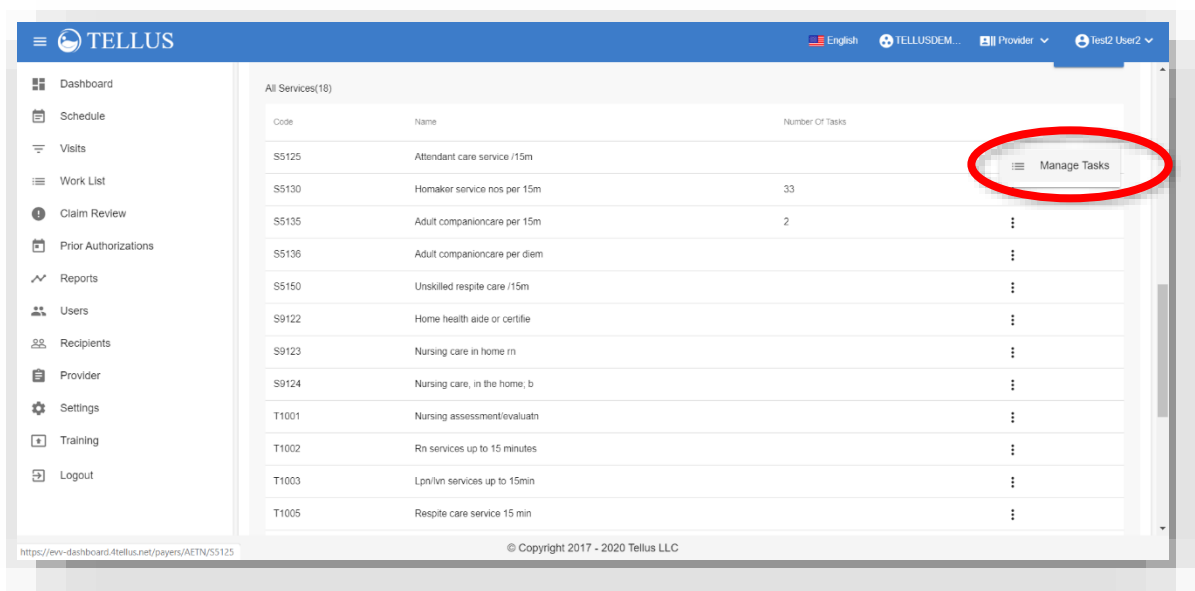


Manually Adding a New Task for a Payer Service Code (Available if program allows it)

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Payers](#) > Manually Adding a New Task for a Payer Service Code

To add a new task:

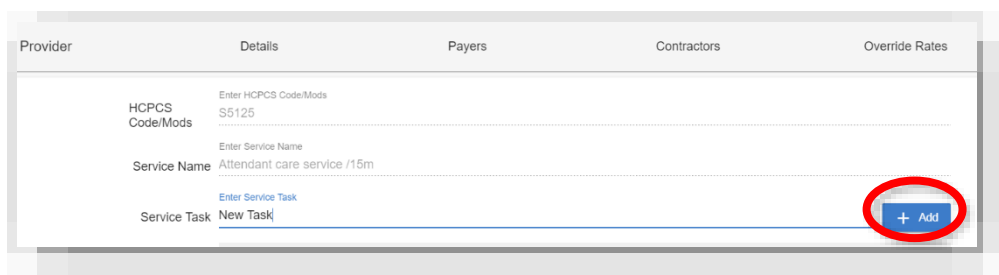
1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Payers** tab.
5. [Find the Payer](#) that you want to add a task to.
6. Find the task you want to add the task to.
7. Click the submenu (vertical dots) and select **Manage Tasks**.



The screenshot shows the TELLUS dashboard interface. On the left is a navigation menu with options like Dashboard, Schedule, Visits, Work List, Claim Review, etc. The main area displays a table titled 'All Services(18)'. The table has columns for Code, Name, and Number Of Tasks. A red circle highlights the 'Manage Tasks' button in the rightmost column of the table, which is positioned next to the first row (S5125 Attendant care service /15m).

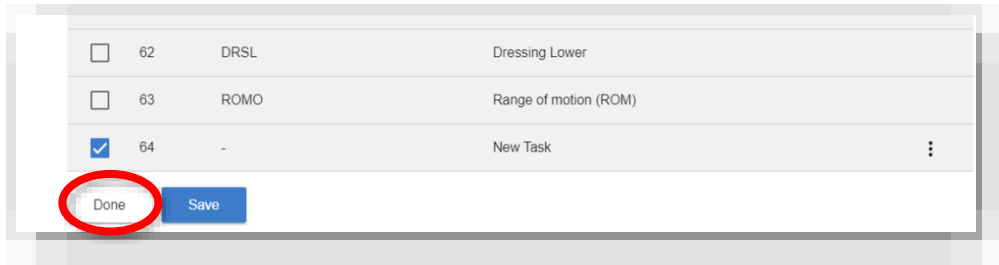
| Code | Name | Number Of Tasks | |
|-------|-------------------------------|-----------------|--------------|
| S5125 | Attendant care service /15m | | Manage Tasks |
| S5130 | Homemaker service nos per 15m | 33 | |
| S5135 | Adult companioncare per 15m | 2 | ⋮ |
| S5136 | Adult companioncare per diem | | ⋮ |
| S5150 | Unskilled respite care /15m | | ⋮ |
| S9122 | Home health aide or certifie | | ⋮ |
| S9123 | Nursing care in home rn | | ⋮ |
| S9124 | Nursing care, in the home; b | | ⋮ |
| T1001 | Nursing assessment/evaluath | | ⋮ |
| T1002 | Rn services up to 15 minutes | | ⋮ |
| T1003 | Lpn/lvn services up to 15min | | ⋮ |
| T1005 | Respite care service 15 min | | ⋮ |

8. Enter the task name in the **Service Task** field and then click **+ Add**.



The screenshot shows the 'Add Task' form within the TELLUS system. The form has tabs for Provider, Details, Payers, Contractors, and Override Rates. The 'Details' tab is active. Fields include HCPCS Code/Mods (S5125), Service Name (Attendant care service /15m), and Service Task (New Task). A red circle highlights the '+ Add' button at the bottom right of the form.

9. The new task is added to the bottom of the list; be sure to check the new task.
10. Scroll to the bottom of the page and click **Done**.



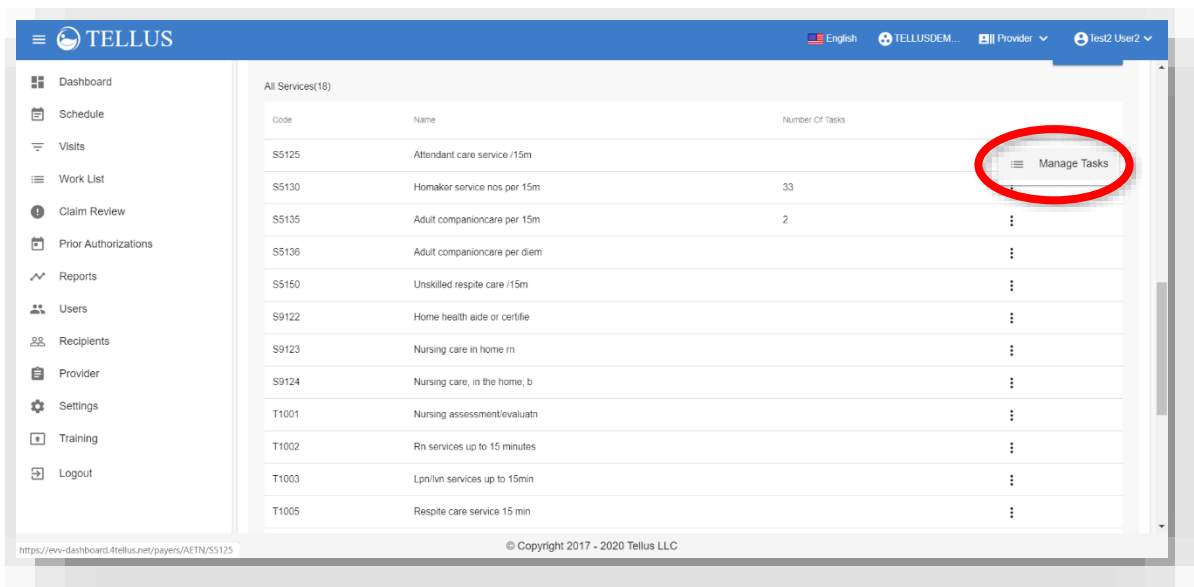
Deleting Manually Added Tasks for a Payer (Available if program allows it)

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > Deleting Manually Added Tasks for a Payer

Note: You can only delete tasks that have been entered through the Provider option on the Tellus EVV Administrator console. Tasks that are uploaded with Provider and Payer information cannot be deleted.

To delete a task:

1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Payers** tab.
5. [Find the Payer](#) that you want to delete the task from.
6. Find the task you want to delete the task from.
7. Click the submenu (vertical dots) and select **Manage Tasks**.



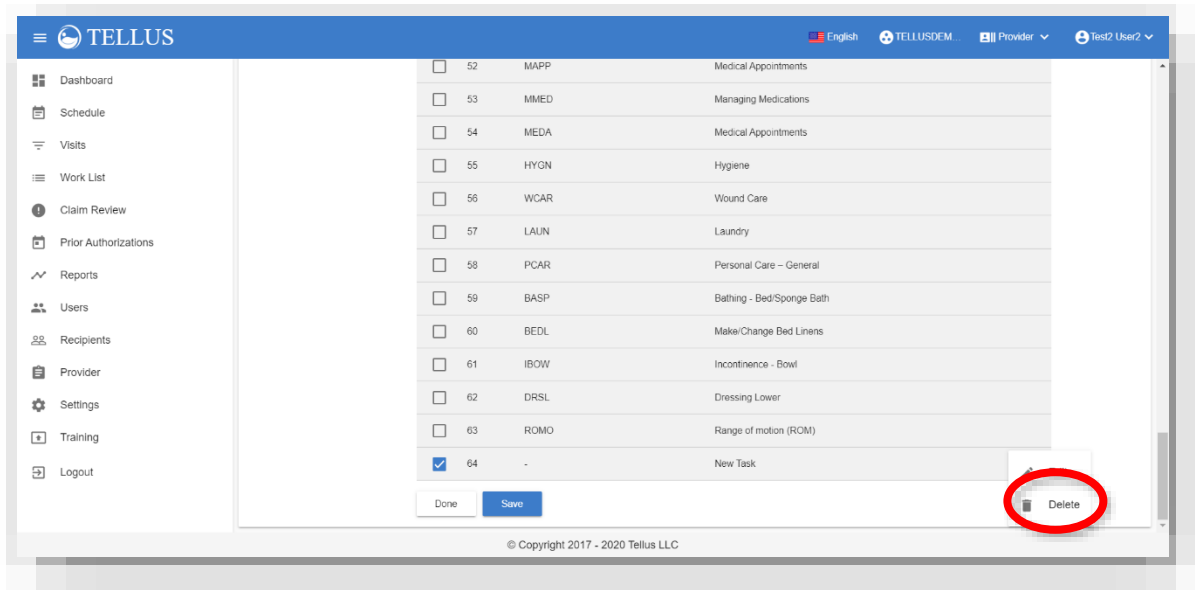
The screenshot shows the Tellus EVV Administrator console interface. The top navigation bar includes the Tellus logo, language settings (English), user information (TELLUSDEM...), and a dropdown menu for 'Provider' with 'Test2 User2' selected. A left sidebar contains a 'Main Menu' with various navigation options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Settings, Training, and Logout. The main content area displays a table titled 'All Services(18)' with columns for Code, Name, and Number Of Tasks. The table lists various services such as 'Attendant care service /15m', 'Homemaker service nos per 15m', 'Adult companioncare per 15m', etc. A red circle highlights the 'Manage Tasks' option in the submenu of the first row.

| Code | Name | Number Of Tasks |
|-------|-------------------------------|-----------------|
| S5125 | Attendant care service /15m | |
| S5130 | Homemaker service nos per 15m | 33 |
| S5135 | Adult companioncare per 15m | 2 |
| S5136 | Adult companioncare per diem | |
| S5150 | Unskilled respice care /15m | |
| S9122 | Home health aide or certifie | |
| S9123 | Nursing care in home rn | |
| S9124 | Nursing care, in the home; b | |
| T1001 | Nursing assessment/evaluatn | |
| T1002 | Rn services up to 15 minutes | |
| T1003 | Lpn/lvn services up to 15min | |
| T1005 | Respite care service 15 min | |

https://evv-dashboard.tellus.net/payers/AETN/S5125 © Copyright 2017 - 2020 Tellus LLC

- Find the task you want to delete; remember, only tasks that have been entered through this option can be deleted.
- Click the submenu (vertical dots) and select **Manage Tasks**.

Note: At this time, you can only delete manually added tasks; you cannot edit them.



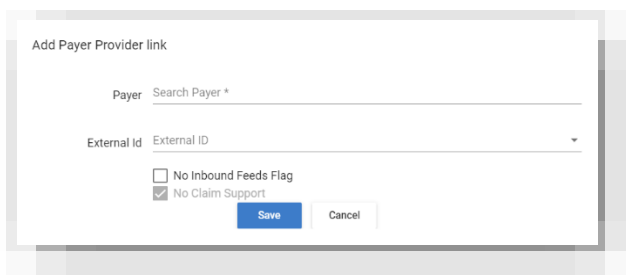
- Scroll to the bottom of the page and click **Done**.

Linking a Payer to a Provider

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Payers](#) > Linking a Payer to a Provider

Note: Not all agencies are authorized to link new payers.

1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Payers** tab.
5. [Find the Payer](#) you want to link.
6. Click the “add payer” icon (plus sign) in the upper right corner of the page.



7. Click the **Payer** field; a list of Payers that are currently in the Tellus EVV system display.
8. Select the Payer you want to link to the Provider; the **External ID** field will populate automatically based on your selection.

Note: Checkboxes at the bottom of the window default to the correct settings; do not change them.

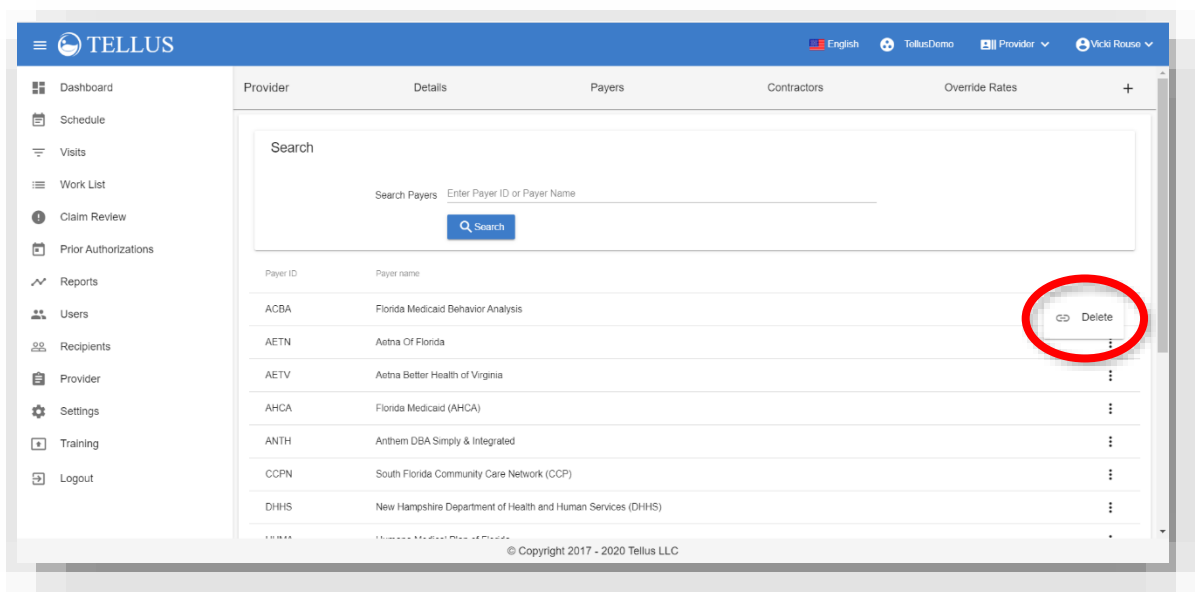
9. Click **Save**.

Deleting Payers

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Payers](#) > Deleting Payers

Note: Not all agencies are authorized to delete payers.

1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Payers** tab.
5. [Find the Payer](#) you want to delete.
6. Click Payers tab, click submenu (vertical dots), select **Delete**.



Related Topics

- [Searching for a Provider Agency](#)
- [Managing Contractors](#)
- [Updating Provider Agency Details](#)
- [Overriding Payer Rates](#)

Managing Contractors

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > Managing Contractors

In his section you will find information about:

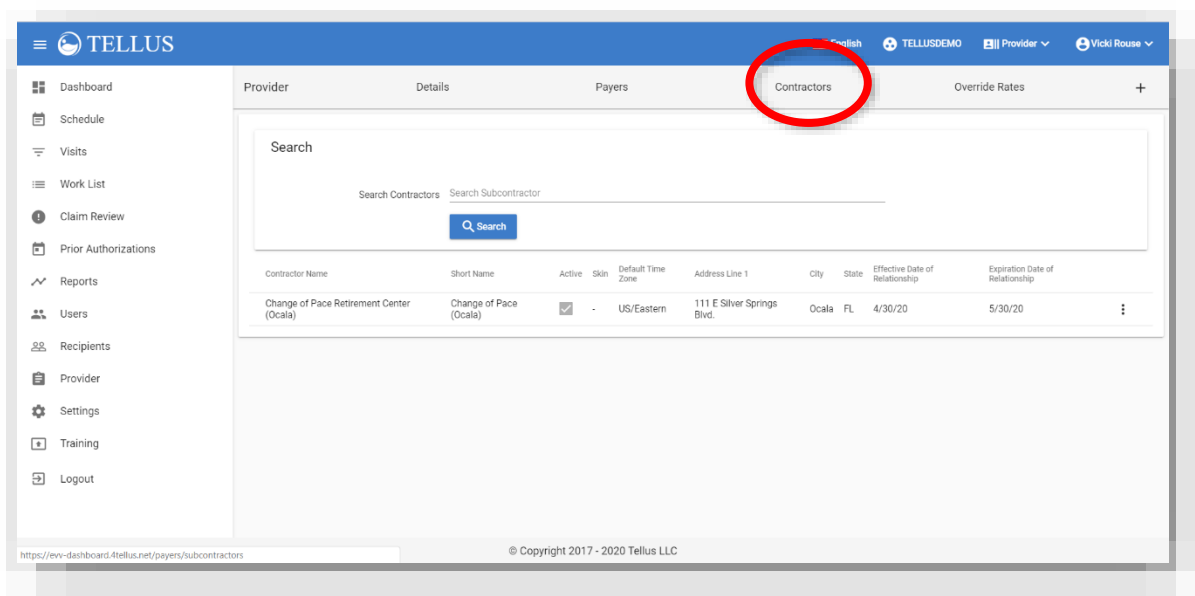
- [Searching for a Contractor](#)
- [Linking a Provider to Contractors](#)
- [Deleting a Contractor](#)

Searching for a Contractor

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Contractors](#) > Searching for a Contractor

To find a Contractor:

1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Contractors** tab to see the Contractors associated with the Provider.



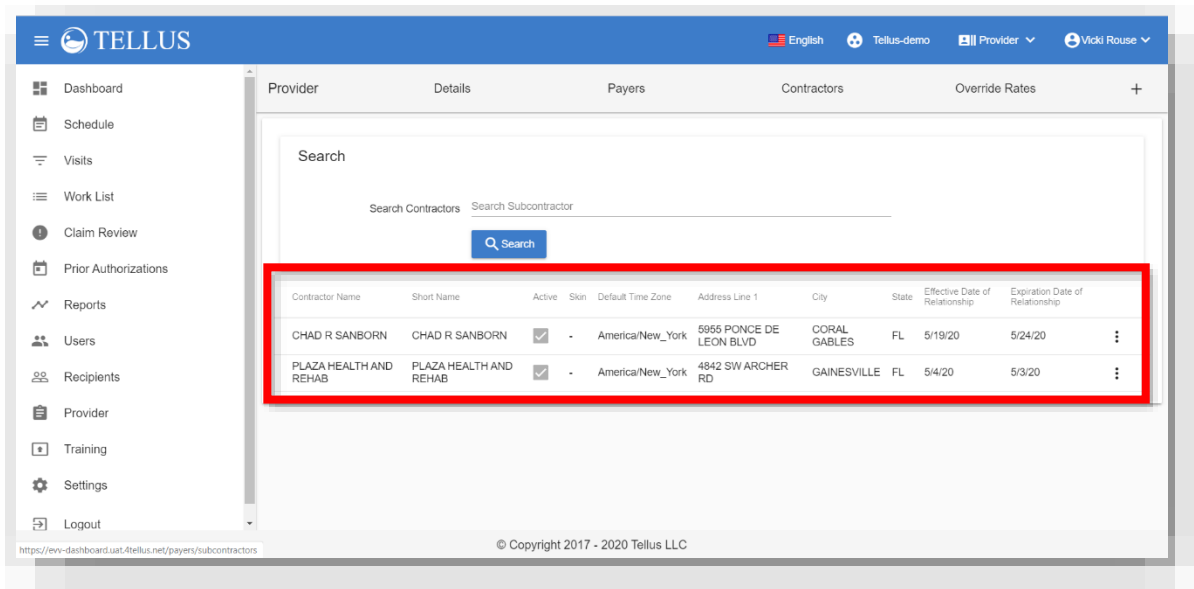
The screenshot shows the Tellus EVV Administrator User Guide interface. The top navigation bar includes the Tellus logo, language settings (English), a demo environment (TELLUSDEMO), a provider dropdown menu, and a user profile (Vicki Rouse). The main content area is titled 'Provider' and has several tabs: 'Details', 'Payers', 'Contractors', and 'Override Rates'. The 'Contractors' tab is highlighted with a red circle. Below the tabs is a search section with two input fields: 'Search Contractors' and 'Search Subcontractor', and a 'Search' button. Below the search section is a table with the following columns: Contractor Name, Short Name, Active, Skin, Default Time Zone, Address Line 1, City, State, Effective Date of Relationship, and Expiration Date of Relationship. The table contains one row of data:

| Contractor Name | Short Name | Active | Skin | Default Time Zone | Address Line 1 | City | State | Effective Date of Relationship | Expiration Date of Relationship |
|--|------------------------|-------------------------------------|------|-------------------|----------------------------|-------|-------|--------------------------------|---------------------------------|
| Change of Pace Retirement Center (Ocala) | Change of Pace (Ocala) | <input checked="" type="checkbox"/> | - | US/Eastern | 111 E Silver Springs Blvd. | Ocala | FL | 4/30/20 | 5/30/20 |

The footer of the page shows the URL <https://evv-dashboard.tellus.net/payers/subcontractors> and the copyright notice © Copyright 2017 - 2020 Tellus LLC.

5. Enter all or part of the Contractor name in the **Search Contractor** field.

6. Click **Search**; results display at the bottom of the page.

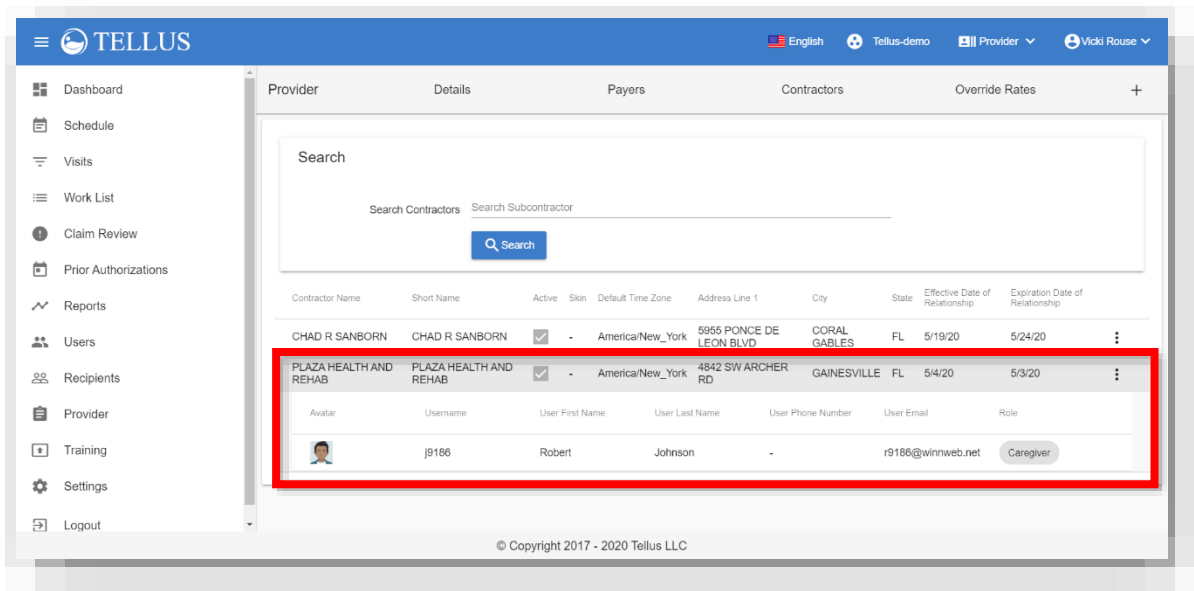


The screenshot shows the TELLUS web application interface. The top navigation bar includes the TELLUS logo, language settings (English), user information (Tellus-demo, Provider, Vicki Rouse), and a search icon. The left sidebar contains a menu with options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Training, Settings, and Logout. The main content area is titled "Provider" and contains a search section with "Search Contractors" and "Search Subcontractor" input fields and a "Search" button. Below the search section is a table of search results, which is highlighted with a red box. The table has the following columns: Contractor Name, Short Name, Active, Skin, Default Time Zone, Address Line 1, City, State, Effective Date of Relationship, and Expiration Date of Relationship.

| Contractor Name | Short Name | Active | Skin | Default Time Zone | Address Line 1 | City | State | Effective Date of Relationship | Expiration Date of Relationship |
|------------------------|------------------------|-------------------------------------|------|-------------------|-------------------------|--------------|-------|--------------------------------|---------------------------------|
| CHAD R SANBORN | CHAD R SANBORN | <input checked="" type="checkbox"/> | - | America/New_York | 5955 PONCE DE LEON BLVD | CORAL GABLES | FL | 5/19/20 | 5/24/20 |
| PLAZA HEALTH AND REHAB | PLAZA HEALTH AND REHAB | <input checked="" type="checkbox"/> | - | America/New_York | 4842 SW ARCHER RD | GAINESVILLE | FL | 5/4/20 | 5/3/20 |

At the bottom of the page, there is a copyright notice: © Copyright 2017 - 2020 Tellus LLC.


7. Click a line to see Contractor details.



The screenshot shows the TELLUS web application interface. The top navigation bar and left sidebar are the same as in the previous screenshot. The main content area is titled "Provider" and contains a search section. Below the search section is a table of search results, which is highlighted with a red box. The table has the following columns: Contractor Name, Short Name, Active, Skin, Default Time Zone, Address Line 1, City, State, Effective Date of Relationship, and Expiration Date of Relationship.

| Contractor Name | Short Name | Active | Skin | Default Time Zone | Address Line 1 | City | State | Effective Date of Relationship | Expiration Date of Relationship |
|------------------------|------------------------|-------------------------------------|------|-------------------|-------------------------|--------------|-------|--------------------------------|---------------------------------|
| CHAD R SANBORN | CHAD R SANBORN | <input checked="" type="checkbox"/> | - | America/New_York | 5955 PONCE DE LEON BLVD | CORAL GABLES | FL | 5/19/20 | 5/24/20 |
| PLAZA HEALTH AND REHAB | PLAZA HEALTH AND REHAB | <input checked="" type="checkbox"/> | - | America/New_York | 4842 SW ARCHER RD | GAINESVILLE | FL | 5/4/20 | 5/3/20 |

Below the search results table is a table of user details, which is also highlighted with a red box. The table has the following columns: Avatar, Username, User First Name, User Last Name, User Phone Number, User Email, and Role.

| Avatar | Username | User First Name | User Last Name | User Phone Number | User Email | Role |
|---|----------|-----------------|----------------|-------------------|------------------|-----------|
|  | j9186 | Robert | Johnson | - | r9186@winweb.net | Caregiver |

At the bottom of the page, there is a copyright notice: © Copyright 2017 - 2020 Tellus LLC.

Linking a Provider to a Contractor

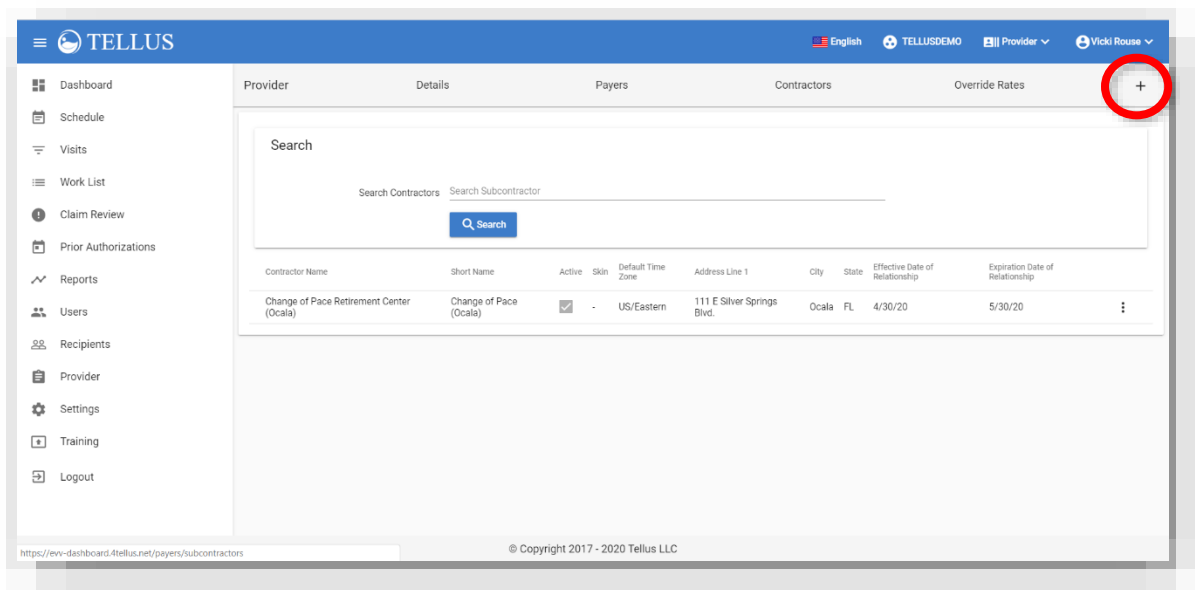
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Contractors](#) > Linking a Provider to a Contractor

Tellus allows Provider Agencies to link with other Provider Agencies (Contractors) to ensure adequate staff are available to provide the services Recipients need. The Contractor will be able to add Users, will have access to your Recipients, and will be able to schedule visits for them.

Note: You can only link to Contractors (Providers) that already exist in the Tellus EVV system.

To link your agency with a Contractor:

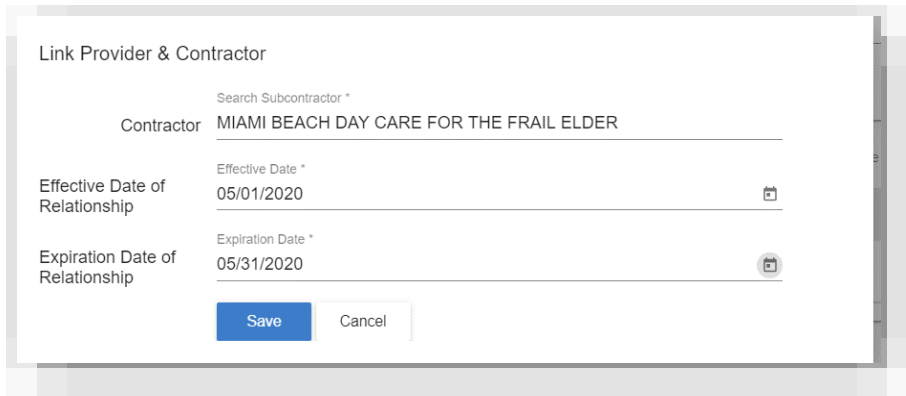
1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Contractors** tab.
5. Click the “plus sign” in the top right corner of the page.



The screenshot shows the Tellus EVV Administrator User Guide interface. The top navigation bar includes the Tellus logo, language settings (English), a demo environment (TELLUSDEMO), and user information (Provider, Vicki Rouse). The main content area is divided into tabs: Provider, Details, Payers, Contractors, and Override Rates. The 'Contractors' tab is active, displaying a search bar and a table of contractors. A red circle highlights a plus sign (+) in the top right corner of the page.

| Contractor Name | Short Name | Active | Skin | Default Time Zone | Address Line 1 | City | State | Effective Date of Relationship | Expiration Date of Relationship |
|--|------------------------|-------------------------------------|------|-------------------|----------------------------|-------|-------|--------------------------------|---------------------------------|
| Change of Pace Retirement Center (Ocala) | Change of Pace (Ocala) | <input checked="" type="checkbox"/> | - | US/Eastern | 111 E Silver Springs Blvd. | Ocala | FL | 4/30/20 | 5/30/20 |

- When the **Link Provider & Contractor** window opens, click the **Contractor** field and select the Contractor you want to link to your Provider Agency.

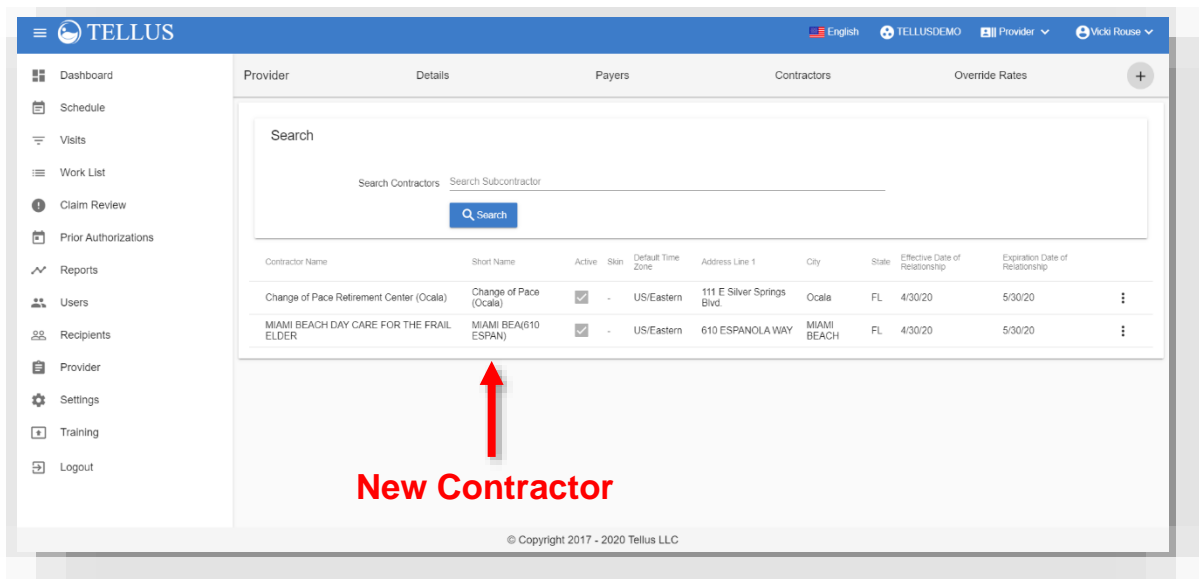


- Enter the duration of the contract; click the [calendar icon](#) in the **Effective Date of Relationship** and **Expiration Date of Relationship** fields and select the appropriate dates.

The Contractor will be able to add Users, will have access to your Recipients, and will be able to schedule visits for them during this period only.

- Click **Save**.

The Provider is added to the list of Contractors.



| Contractor Name | Short Name | Active | Skin | Default Time Zone | Address Line 1 | City | State | Effective Date of Relationship | Expiration Date of Relationship | |
|--|------------------------|-------------------------------------|------|-------------------|----------------------------|-------------|-------|--------------------------------|---------------------------------|---|
| Change of Pace Retirement Center (Ocala) | Change of Pace (Ocala) | <input checked="" type="checkbox"/> | - | US/Eastern | 111 E Silver Springs Blvd. | Ocala | FL | 4/30/20 | 5/30/20 | : |
| MIAMI BEACH DAY CARE FOR THE FRAIL ELDER | MIAMI BEA/610 ESPAN | <input checked="" type="checkbox"/> | - | US/Eastern | 610 ESPANOLA WAY | MIAMI BEACH | FL | 4/30/20 | 5/30/20 | : |

New Contractor

Related Topics

- [Searching for a Provider](#)
- [Updating Provider Details](#)
- [Managing Payers](#)
- [Adding Provider Override Rates](#)

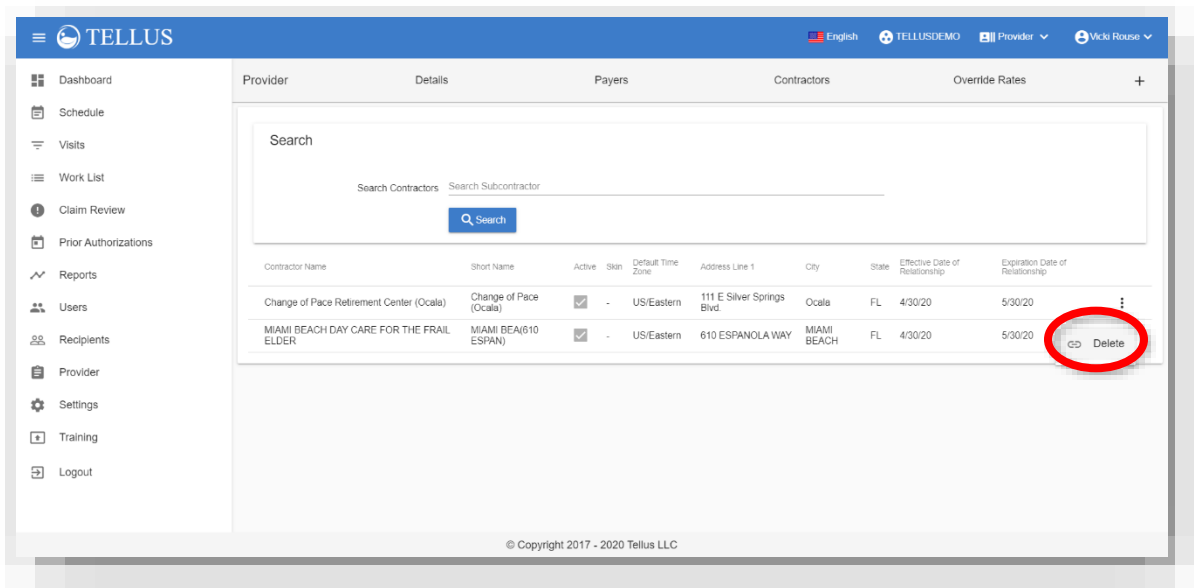
Deleting a Contractor

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Contractors](#) > Deleting a Contractor

You can delete a Contractor at any time; when you do, they will no longer have access to your Recipients and can no longer schedule visits for them.

To delete a Contractor

1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Contractors** tab.
5. Click submenu (vertical dots) to the right of the Contractor you want to remove and then select **Delete**.



The screenshot shows the Tellus web application interface. The top navigation bar includes the Tellus logo, language settings (English), user information (TELLUSDEMO), and a dropdown menu for the current provider (Vicki Rouse). The main content area is titled 'Provider' and has tabs for 'Details', 'Payers', 'Contractors', and 'Override Rates'. The 'Contractors' tab is active, displaying a search bar and a table of contractors. The table has columns for Contractor Name, Short Name, Active status, Skin, Default Time Zone, Address Line 1, City, State, Effective Date of Relationship, and Expiration Date of Relationship. Two contractors are listed: 'Change of Pace Retirement Center (Ocala)' and 'MIAMI BEACH DAY CARE FOR THE FRAIL ELDER'. The 'Delete' button for the second contractor is circled in red.

| Contractor Name | Short Name | Active | Skin | Default Time Zone | Address Line 1 | City | State | Effective Date of Relationship | Expiration Date of Relationship | |
|--|------------------------|-------------------------------------|------|-------------------|---------------------------|-------------|-------|--------------------------------|---------------------------------|--------|
| Change of Pace Retirement Center (Ocala) | Change of Pace (Ocala) | <input checked="" type="checkbox"/> | - | US/Eastern | 111 E Silver Springs Blvd | Ocala | FL | 4/30/20 | 5/30/20 | ⋮ |
| MIAMI BEACH DAY CARE FOR THE FRAIL ELDER | MIAMI BEA/610 ESPAN | <input checked="" type="checkbox"/> | - | US/Eastern | 610 ESPANOLA WAY | MIAMI BEACH | FL | 4/30/20 | 5/30/20 | Delete |

Related Topics

- [Searching for a Provider Agency](#)
- [Updating Provider Agency Details](#)
- [Managing Payers](#)
- [Updating Provider Details](#)
- [Overriding Payer Rates](#)

Managing Payer Override Rates

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > Managing Payer Override Rates

In this section you will find information about:

- [Searching for a Specific Payer Override Rate](#)
- [Adding a Payer Override Rate](#)
- [Updating a Payer Override Rate](#)
- [Restoring a Payer Override Rate](#)
- [Deleting a Payer Override Rate](#)

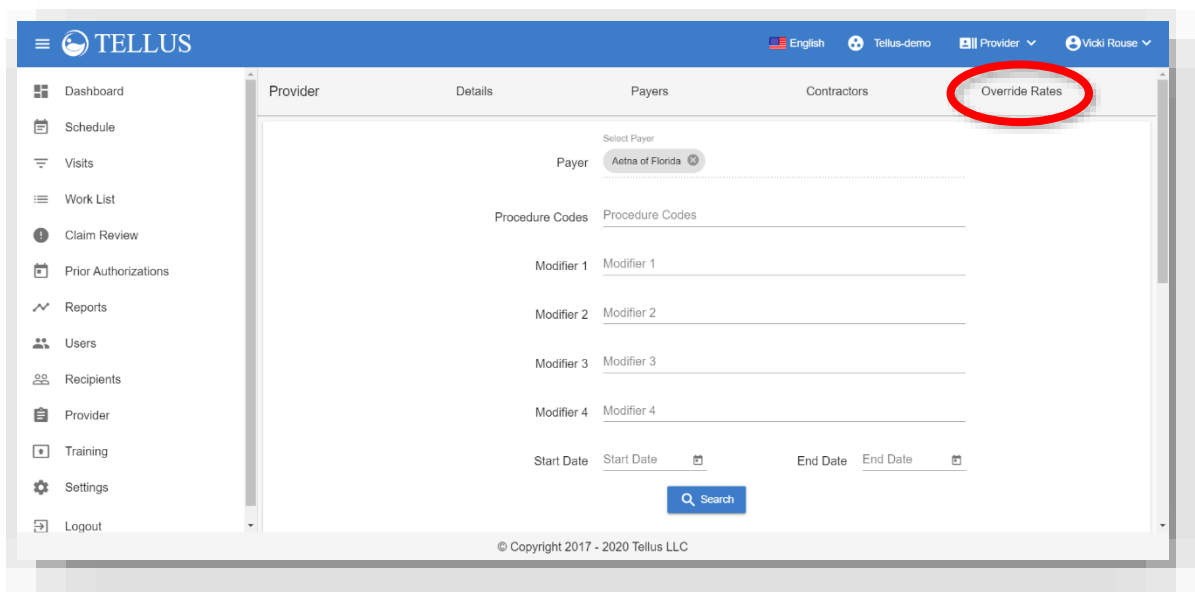
Note: Not all agencies are authorized to override Payer rates.

Searching for a Specific Payer Override Rate

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Payer Override Rates](#) > Searching for a Specific Payer Override Rate

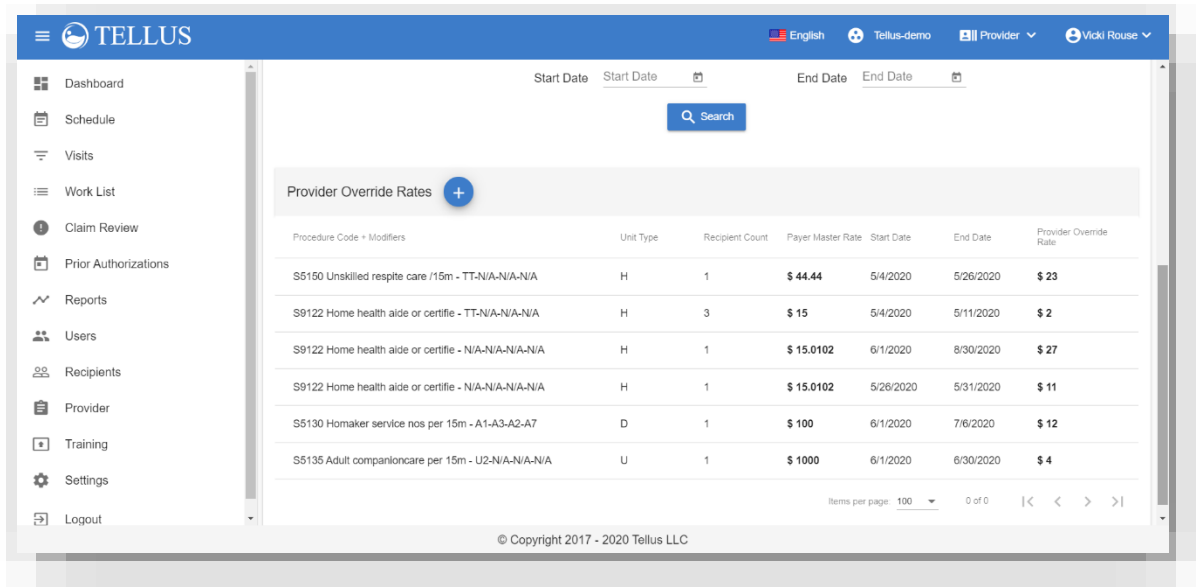
To find a Payer Override Rate:

1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Override Rates** tab.



5. Select a **Payer**.
6. Use the dropdown lists to select a **Procedure Code** and any **Modifiers** you want in order to narrow your list of results.

7. Click **Search**.
8. Scroll down to see the results.



The screenshot shows the TELLUS web application interface. The top navigation bar includes the TELLUS logo, language settings (English), user profile (Vicki Rouse), and a search bar. The left sidebar contains a menu with options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Training, Settings, and Logout. The main content area displays a table titled "Provider Override Rates" with a search button above it. The table has columns for Procedure Code + Modifiers, Unit Type, Recipient Count, Payer Master Rate, Start Date, End Date, and Provider Override Rate. The table contains seven rows of data.

| Procedure Code + Modifiers | Unit Type | Recipient Count | Payer Master Rate | Start Date | End Date | Provider Override Rate |
|--|-----------|-----------------|-------------------|------------|-----------|------------------------|
| S5150 Unskilled respite care /15m - TT-N/A-N/A-N/A | H | 1 | \$ 44.44 | 5/4/2020 | 5/26/2020 | \$ 23 |
| S9122 Home health aide or certifie - TT-N/A-N/A-N/A | H | 3 | \$ 15 | 5/4/2020 | 5/11/2020 | \$ 2 |
| S9122 Home health aide or certifie - N/A-N/A-N/A-N/A | H | 1 | \$ 15.0102 | 6/1/2020 | 8/30/2020 | \$ 27 |
| S9122 Home health aide or certifie - N/A-N/A-N/A-N/A | H | 1 | \$ 15.0102 | 5/26/2020 | 5/31/2020 | \$ 11 |
| S5130 Homaker service nos per 15m - A1-A3-A2-A7 | D | 1 | \$ 100 | 6/1/2020 | 7/6/2020 | \$ 12 |
| S5135 Adult companioncare per 15m - U2-N/A-N/A-N/A | U | 1 | \$ 1000 | 6/1/2020 | 6/30/2020 | \$ 4 |

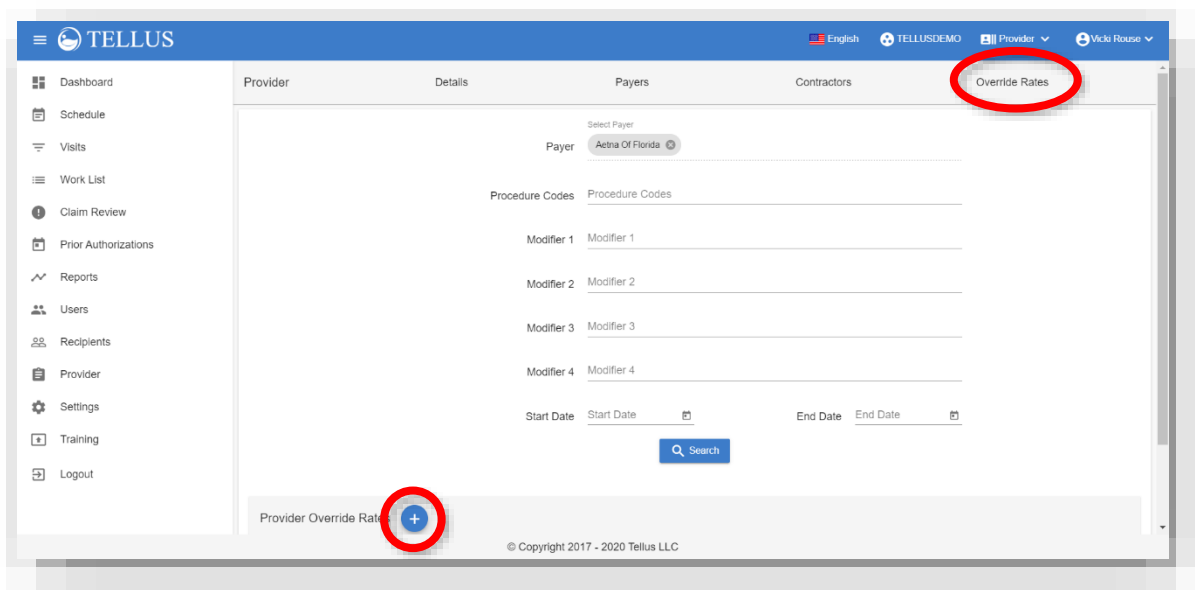
At the bottom of the table, there is a pagination control showing "Items per page: 100" and "0 of 0". The footer of the page reads "© Copyright 2017 - 2020 Tellus LLC".

Adding a Payer Override Rate

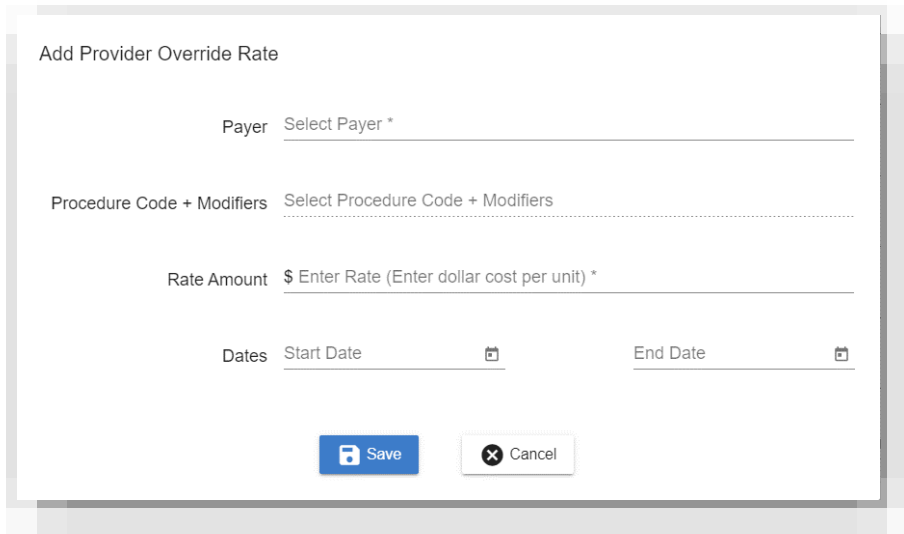
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Payer Override Rates](#) > Adding a Payer Override Rate

To add an override rate:

1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Override Rates** tab.



5. Click the “add Provider Override Rates” icon (plus sign at bottom left of page).



The screenshot shows a web form titled "Add Provider Override Rate". It contains the following fields and controls:

- Payer:** A dropdown menu with the placeholder text "Select Payer *".
- Procedure Code + Modifiers:** A dropdown menu with the placeholder text "Select Procedure Code + Modifiers".
- Rate Amount:** A text input field with a dollar sign icon and the placeholder text "\$ Enter Rate (Enter dollar cost per unit) *".
- Dates:** Two date input fields labeled "Start Date" and "End Date", each with a calendar icon to its right.
- Buttons:** A blue "Save" button with a floppy disk icon and a white "Cancel" button with a close icon.

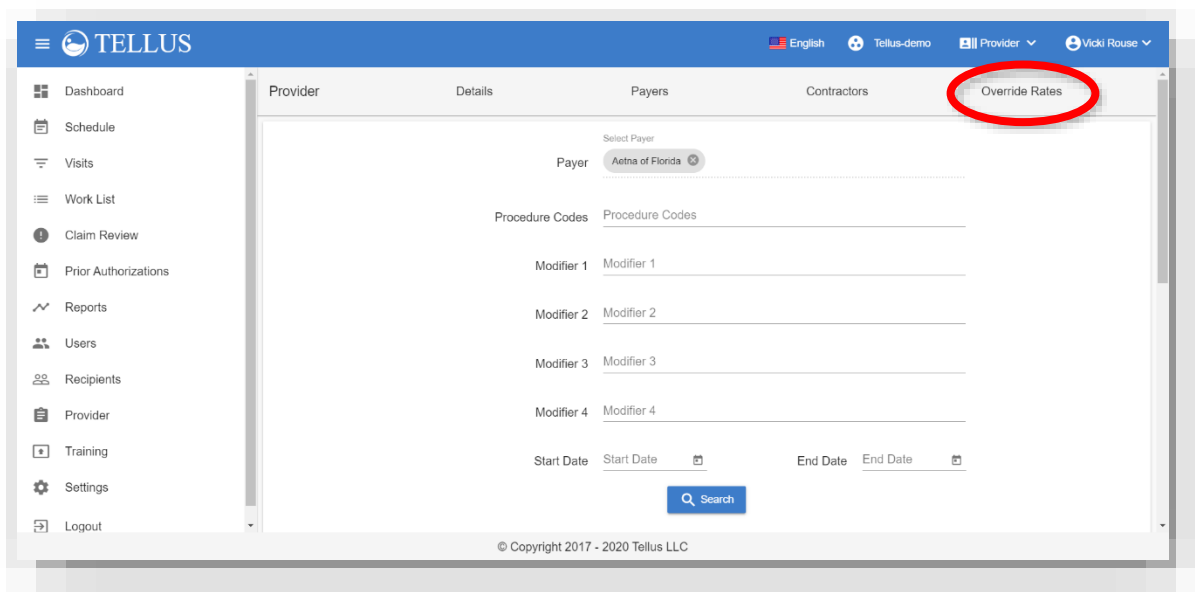
6. Click the **Payer** field and select the Payer whose rates you want to Override.
7. Click the **Procedure Code + Modifiers** field to select that service you want to override the rate for.
8. In the **Rate Amount** field, enter the new rate.
9. Enter the duration of the rate; click the [calendar icon](#) in the **Start Date** and **End Date** fields and select the appropriate dates.
10. Click **Save**.

Updating a Payer Override Rate

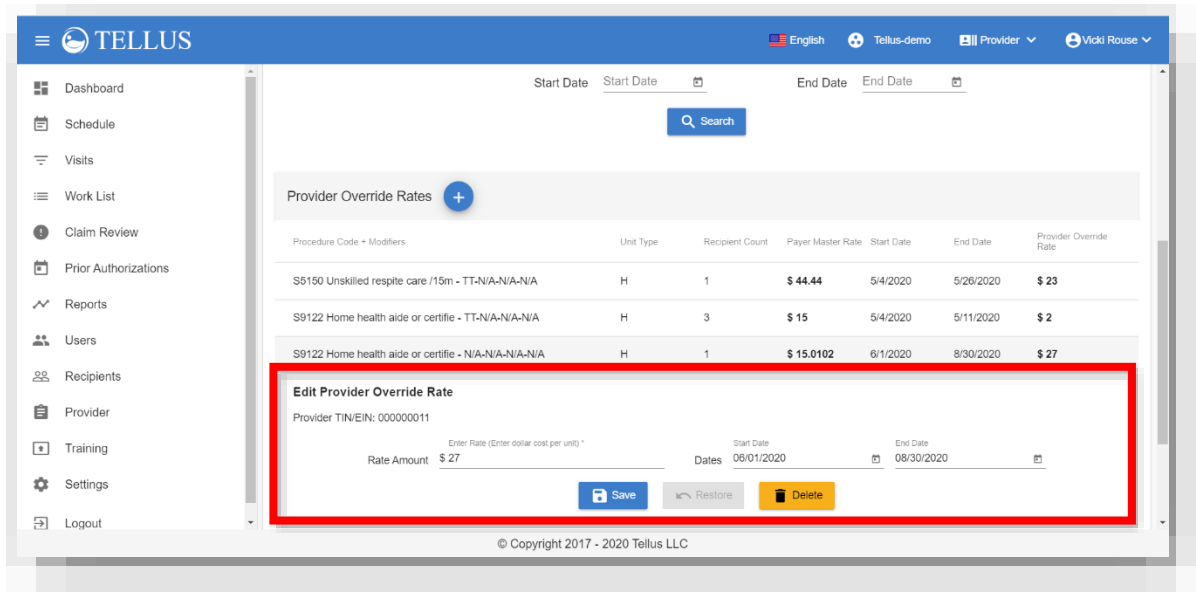
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Payer Override Rates](#) > Updating a Payer Override Rate

To update a Payer Override Rate:

1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Override Rates** tab.



5. [Search for the override rate](#) you want to update.
6. When results display, click the line for the override rate you want to update.



The screenshot shows the TELLUS web application interface. On the left is a navigation menu with items like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Training, Settings, and Logout. The main content area displays a table of 'Provider Override Rates' with columns for Procedure Code + Modifiers, Unit Type, Recipient Count, Payer Master Rate, Start Date, End Date, and Provider Override Rate. The table contains three rows of data. Below the table, an 'Edit Provider Override Rate' form is visible, which is highlighted with a red border. The form includes a 'Provider TIN/EIN' field with the value '000000011', a 'Rate Amount' field with the value '\$ 27', and 'Dates' fields for 'Start Date' (06/01/2020) and 'End Date' (08/30/2020). At the bottom of the form are 'Save', 'Restore', and 'Delete' buttons. The footer of the page reads '© Copyright 2017 - 2020 Tellus LLC'.

| Procedure Code + Modifiers | Unit Type | Recipient Count | Payer Master Rate | Start Date | End Date | Provider Override Rate |
|--|-----------|-----------------|-------------------|------------|-----------|------------------------|
| SS150 Unskilled respite care /15m - TT-N/A-N/A-N/A | H | 1 | \$ 44.44 | 5/4/2020 | 5/26/2020 | \$ 23 |
| S9122 Home health aide or certifie - TT-N/A-N/A-N/A | H | 3 | \$ 15 | 5/4/2020 | 5/11/2020 | \$ 2 |
| S9122 Home health aide or certifie - N/A-N/A-N/A-N/A | H | 1 | \$ 15.0102 | 6/1/2020 | 8/30/2020 | \$ 27 |

7. Make changes as needed, and then click **Save**.

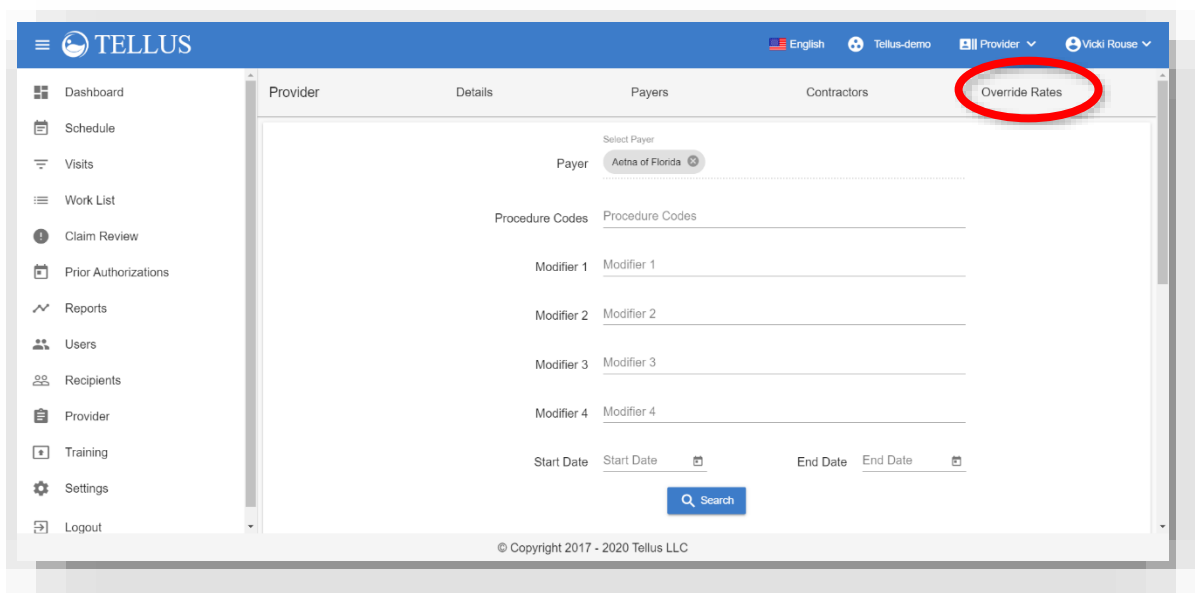
Restoring a Payer Override Rate

You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Payer Override Rates](#) > Restoring a Payer Override Rate

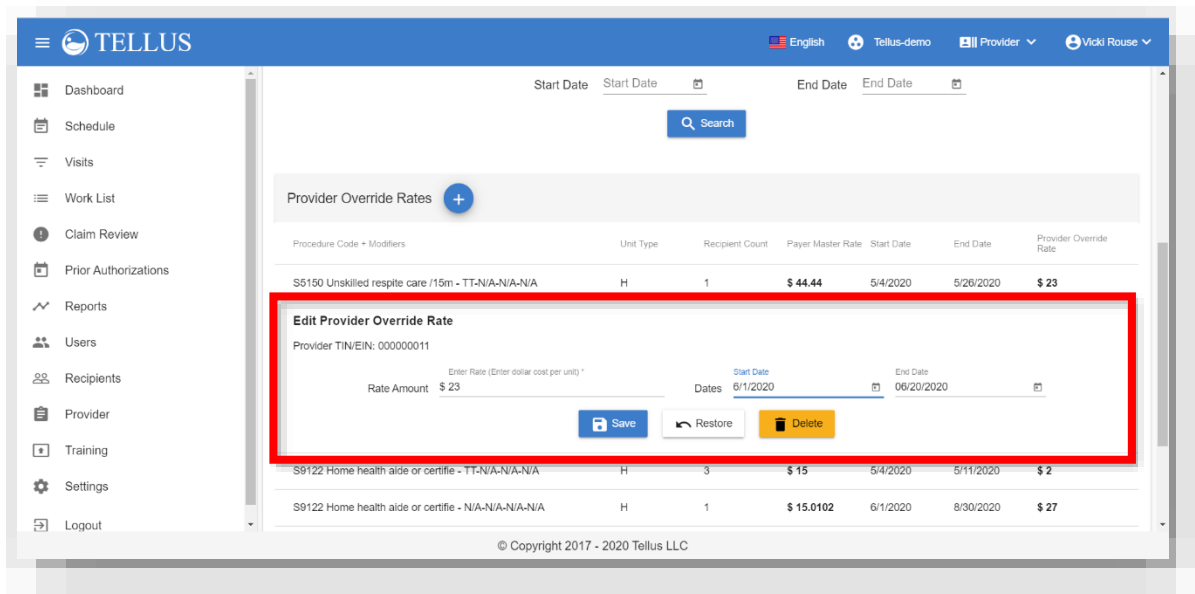
Override rates have a start and end date and are only applied to claims for visits that occur during that time. After the end date, the override rate expires, and Tellus EVV applies the original billing rate to the service.

You can restore an expired override rate:

1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Override Rates** tab.



5. [Search for the override rate](#) you want to restore.
6. When results display, click the line for the override rate you want to restore.



The screenshot shows the TELLUS web application interface. On the left is a navigation menu with items like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Training, Settings, and Logout. The main content area displays a table of 'Provider Override Rates' with columns for Procedure Code + Modifiers, Unit Type, Recipient Count, Payer Master Rate, Start Date, End Date, and Provider Override Rate. One row is highlighted with a red border, indicating it is selected for editing. Below this row is a modal form titled 'Edit Provider Override Rate' for Provider TIN/EIN: 00000011. The form includes a 'Rate Amount' field set to \$23, a 'Start Date' field set to 6/1/2020, and an 'End Date' field set to 06/20/2020. There are 'Save', 'Restore', and 'Delete' buttons at the bottom of the modal. The footer of the page reads '© Copyright 2017 - 2020 Tellus LLC'.

| Procedure Code + Modifiers | Unit Type | Recipient Count | Payer Master Rate | Start Date | End Date | Provider Override Rate |
|--|-----------|-----------------|-------------------|------------|-----------|------------------------|
| S5150 Unskilled respite care /15m - TT-N/A-N/A-N/A | H | 1 | \$ 44.44 | 5/4/2020 | 5/26/2020 | \$ 23 |
| Edit Provider Override Rate Provider TIN/EIN: 00000011 | | | | | | |
| Rate Amount: \$ 23 Start Date: 6/1/2020 End Date: 06/20/2020 | | | | | | |
| S9122 Home health aide or certifie - TT-N/A-N/A-N/A | H | 3 | \$ 15 | 5/4/2020 | 5/11/2020 | \$ 2 |
| S9122 Home health aide or certifie - N/A-N/A-N/A-N/A | H | 1 | \$ 15.0102 | 6/1/2020 | 8/30/2020 | \$ 27 |

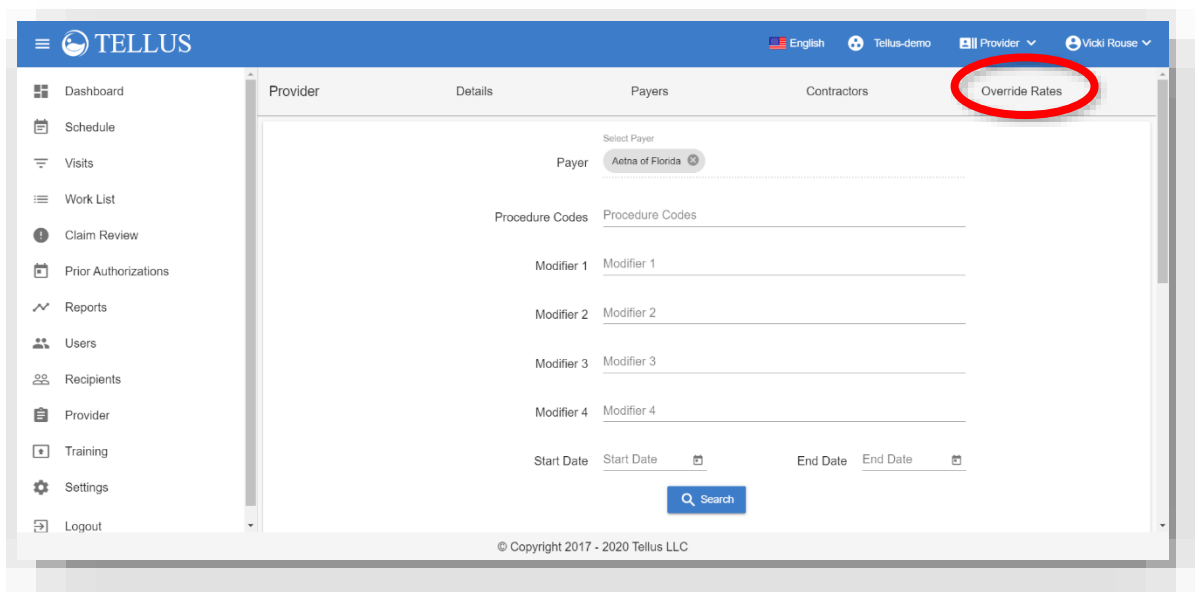
7. Change the **Start Date** and **End Date**.
8. Click **Restore**.

Deleting a Payer Override Rate

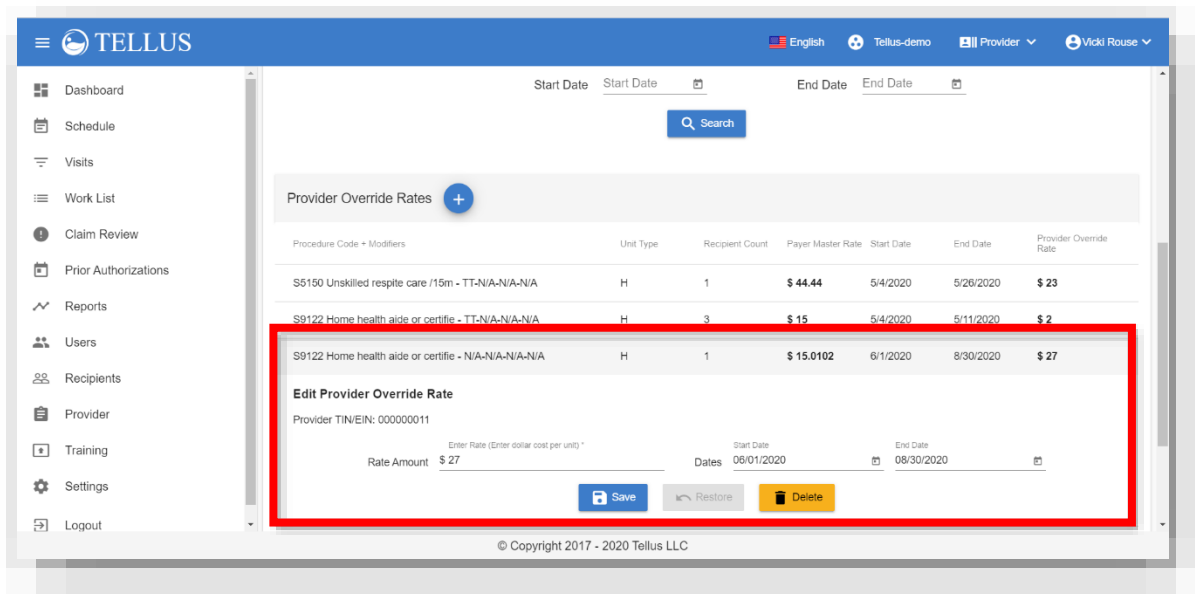
You are here: [Tellus EVV Administrator User Guide](#) > [Managing Provider Agencies](#) > [Managing Payer Override Rates](#) > Deleting a Payer Override Rate

To delete a Payer Override Rate:

1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
3. Click the **Provider** option.
4. Click the **Override Rates** tab.



5. [Search for the override rate](#) you want to delete.
6. When results display, click the line for the override rate you want to delete.



The screenshot shows the TELLUS web application interface. On the left is a navigation menu with items like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Training, Settings, and Logout. The main content area displays a table of 'Provider Override Rates' with columns for Procedure Code + Modifiers, Unit Type, Recipient Count, Payer Master Rate, Start Date, End Date, and Provider Override Rate. The table contains three rows. The third row, 'S9122 Home health aide or certifie - N/A-N/A-N/A-N/A', is highlighted with a red box. Below this row is an 'Edit Provider Override Rate' form. The form includes a 'Provider TIN/EIN' field with the value '000000011', a 'Rate Amount' field with the value '\$ 27', and 'Dates' for 'Start Date' (06/01/2020) and 'End Date' (08/30/2020). At the bottom of the form are 'Save', 'Restore', and 'Delete' buttons. The footer of the page reads '© Copyright 2017 - 2020 Tellus LLC'.

| Procedure Code + Modifiers | Unit Type | Recipient Count | Payer Master Rate | Start Date | End Date | Provider Override Rate |
|--|-----------|-----------------|-------------------|------------|-----------|------------------------|
| S5150 Unskilled respite care /15m - TT-N/A-N/A-N/A | H | 1 | \$ 44.44 | 5/4/2020 | 5/26/2020 | \$ 23 |
| S9122 Home health aide or certifie - TT-N/A-N/A-N/A | H | 3 | \$ 15 | 5/4/2020 | 5/11/2020 | \$ 2 |
| S9122 Home health aide or certifie - N/A-N/A-N/A-N/A | H | 1 | \$ 15.0102 | 6/1/2020 | 8/30/2020 | \$ 27 |

7. Click **Delete**.

Related Topics

- [Searching for a Provider](#)
- [Searching for a Provider Agency](#)
- [Updating Provider Agency Details](#)
- [Managing Payers](#)
- [Managing Contractors](#)

Reporting

You are here: [Tellus EVV Administrator User Guide](#) > Reporting

Click a topic below:

[Generating a Report](#)

[Exporting a Report](#)

Generating a Report

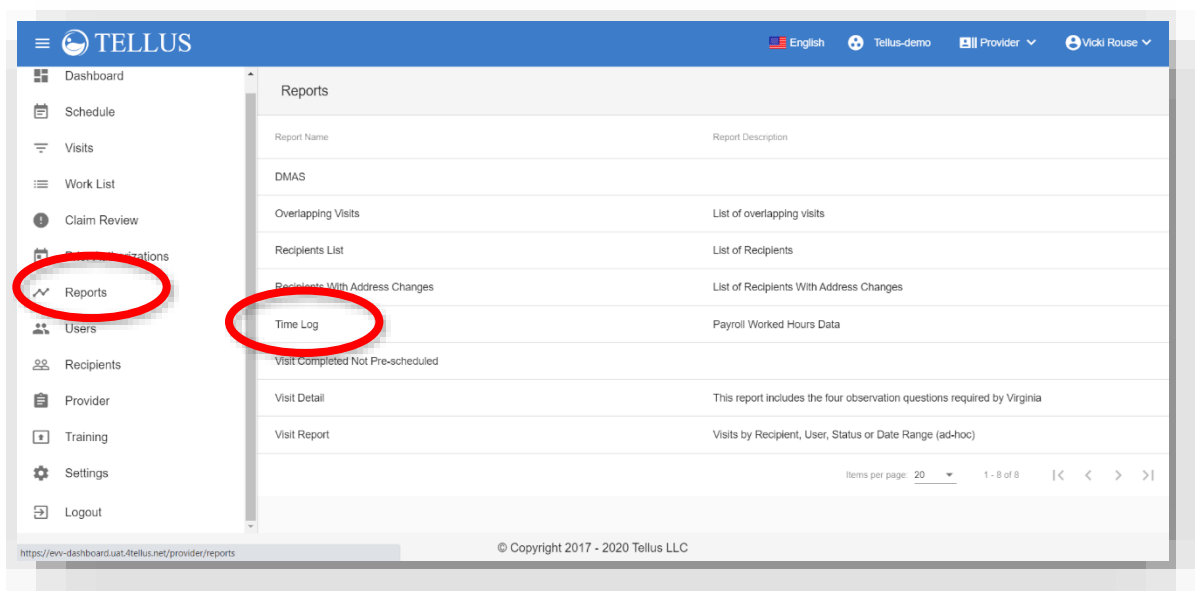
You are here: [Tellus EVV Administrator User Guide](#) > [Reporting](#) > Generating a Report

The Administrator Console offers several reports, including the Time Log report that gives you a list of hours worked by Caregiver, and the Visit Report that lets you see a list of completed tasks for Recipients (tasks are not shown in Visit Detail).

The Time Log report is used as an example in these instructions to show you how to generate a report. Filters are different for each report, but making selections and generating all reports is the same.

To generate one of the standardized reports:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click **Reports**.



3. Click the name of the report you want to generate.
4. When the report displays, you will see filters on the left side of the page.

You may need to scroll down to see all filters.

Reports > Time Log

Export ▼ Zoom in 🔍 Zoom out 🔍

Start Date
2020-05-06

End Date
2020-05-06

Recipient
Available: 2 Selected: 0
Search list...
Jimmy Marley
John Chung
✓ All ✗ None ☑ Invert

Caregiver
Available: 1 Selected: 0
Search list...
Dale Carr

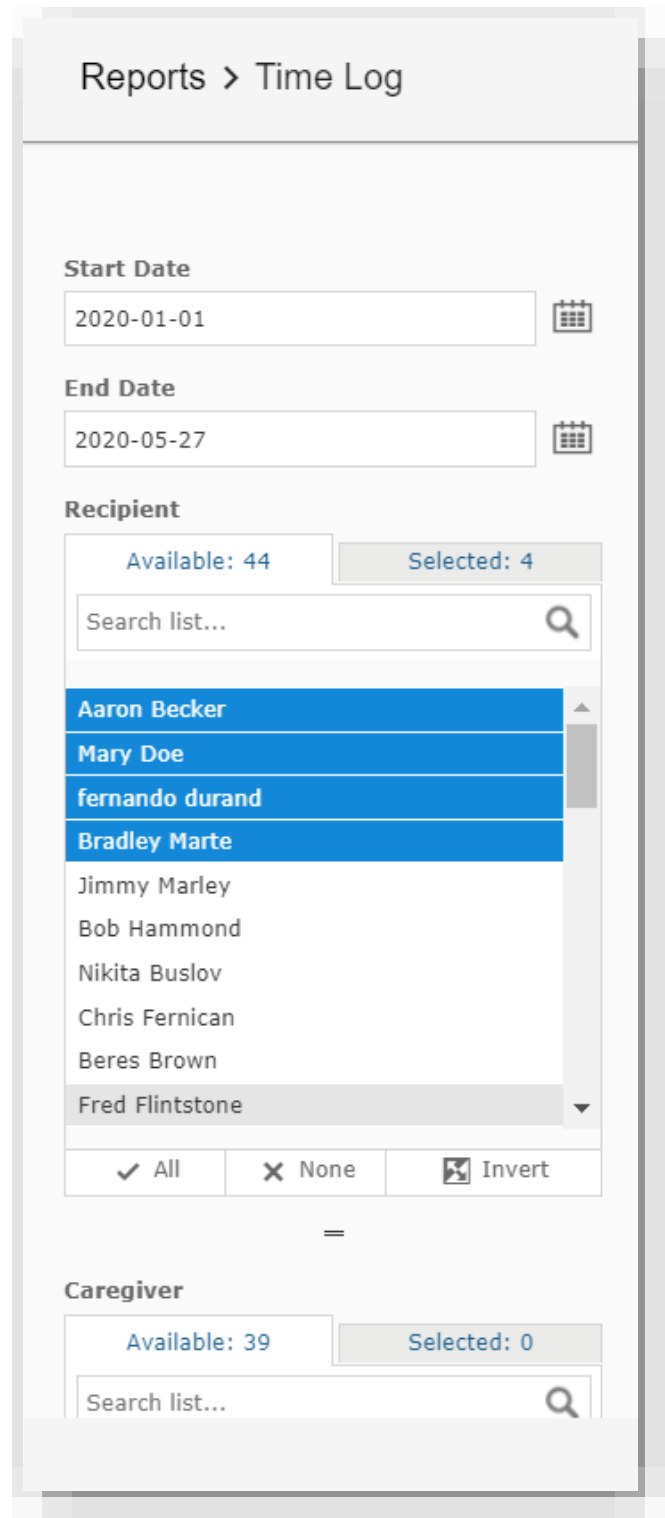
TELLUS DEMO ACCOUNT
Time Log
Time Log: May 6, 2020 - May 6, 2020

| Caregiver | Recipient Name | Payer ID | Procedure Code | Scheduled Start Time | Scheduled End Time | Scheduled Hours | Actual Start Time | Actual End Time |
|----------------------|----------------|----------|----------------|------------------------|------------------------|-----------------|------------------------|------------------------|
| Dale Carr | Jimmy Marley | AETN | T1019 | 05/06/2020 9:05:40 AM | 05/06/2020 9:35:40 AM | 0.50 | 05/06/2020 9:05:40 AM | 05/06/2020 10:35:40 AM |
| Dale Carr | John Chung | AETN | S9122 TT | 05/06/2020 10:15:49 AM | 05/06/2020 10:45:49 AM | 0.50 | 05/06/2020 10:15:49 AM | 05/06/2020 10:45:49 AM |
| Grand Totals: | | | | | | 1.00 | | |

© Copyright 2017 - 2020 Tellus LLC

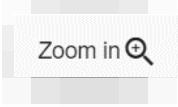
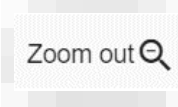
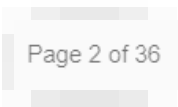




5. Make your entries and selections for any or all of the available filters.
 - For some reports, like the Time Log Report shown, you may be able to enter a range, such as dates, for the data you want to see. Use the dropdown calendar for the **Start Date** and **End Date** to choose the date range you want to see payroll for.
 - Filters like **Recipient** that have tabs titled **Available** and **Selected** allow you to choose from a list. You can:

- Check **All** at the bottom of the list to see all data elements that appear on the **Available** tab. When you do, all elements will appear on the **Selected** tab and the number on the **Selected** tab will be updated.
 - Click individual elements on the **Available** tab if you only want to see a few data elements on the report. Your selections will appear on the **Selected** tab and the number on that tab will change to the number of data elements you selected.
 - Remove any individual element you selected on either the **Available** or **Selected** tab. Click the “x” to the left of the data element you do not want included on the report.
 - Remove all data elements you selected by clicking **None** on the **Available** tab; the **Selected** tab will be updated accordingly.
6. After making all your entries and selections, click **Apply**.



The screenshot shows the 'Reports > Time Log' interface. It features two date selection fields: 'Start Date' (2020-01-01) and 'End Date' (2020-05-27). Below these is a 'Recipient' section with two tabs: 'Available: 44' and 'Selected: 4'. A search bar is present above a list of names. The selected recipients are Aaron Becker, Mary Doe, fernando durand, and Bradley Marte. Other names in the list include Jimmy Marley, Bob Hammond, Nikita Buslov, Chris Fernican, Beres Brown, and Fred Flintstone. At the bottom of the recipient list are three buttons: 'All' (checked), 'None', and 'Invert'. Below this is a 'Caregiver' section with two tabs: 'Available: 39' and 'Selected: 0', and a search bar.

7. Use the buttons listed below to view the contents of the report. Zoom options appear at the top of the page; paging options appear at the bottom of the page. You may need to scroll down to see them. You can also [export the report](#).

| Button | Description |
|---|--|
|  | Zoom in to enlarge report. |
|  | Zoom out to reduce size of report. |
|  | See the number of the page displayed as well as the total number of pages in the report. |
|  | Return to the first page of the report. |
|  | Move back one page. |
|  | Move forward one page. |
|  | Move to last page of the report. |

Related Topic

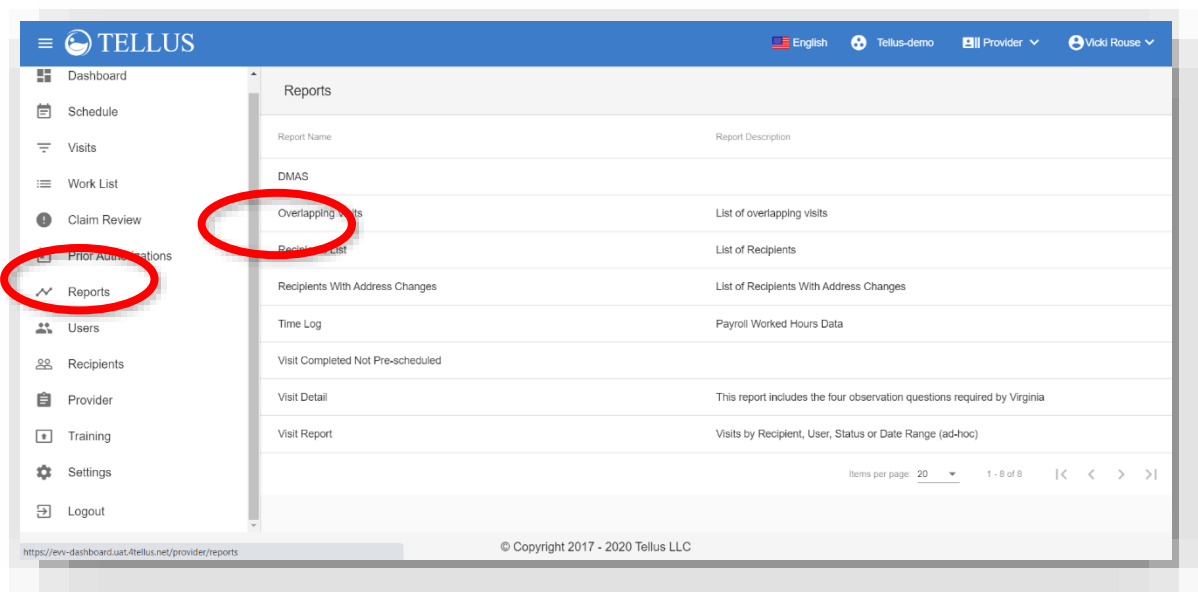
- [Exporting a Report](#)

Exporting a Report

You are here: [Tellus EVV Administrator User Guide](#) > [Reporting](#) > Exporting a Report

To generate one of the standardized reports:

1. Expand the **Main Menu**. (See [Viewing the Main Menu](#) for more information).
2. Click **Reports**.
3. Click the name of the report you want to generate.



4. Use the filters to [select the data](#) you want included on your report and then click **Apply**.

Reports > Payroll report

Export ▼ Zoom in 🔍 Zoom out 🔍

Start Date
2019-09-18

End Date
2019-09-18

Recipient
Available: 4 Selected: 0
Search list...
Bob Hammond
fernando durand
John Chung
Peter Cliff
 Select ... Desele... Invert

Caregiver
Available: 2 Selected: 0
Search list...
Dale Carr

TELLUS DEMO ACCOUNT
Payroll Report
Payroll Period: September 18, 2019 - September 18, 2019

| Caregiver Name | Recipient Name | Procedure Code | Scheduled Start Time | Scheduled End Time | Scheduled Hours | Actual Start Time | Actual End Time |
|---|---------------------------------|----------------|------------------------|------------------------|-----------------|-----------------------|-----------------------|
| Cameron, Salazar 5555555555 18282704609 cameron.salazar@tellus.com | | | | | | | |
| | Maria, Marte DOB: 02/05/1934 | T1019 | 09/18/2019 2:45:33 PM | 09/18/2019 4:45:33 PM | 2.00 | 09/18/2019 2:50:48 PM | 09/18/2019 2:56:27 PM |
| Totals: | | | | | 2.00 | | |
| Dale, Carr 19547194556 dale.carr@tellus.com | | | | | | | |
| | Bob, Hammond DOB: 01/23/1961 | S5130 | 09/18/2019 2:45:05 PM | 09/18/2019 3:00:05 PM | 0.25 | 09/18/2019 1:50:37 PM | 09/18/2019 1:52:19 PM |
| | John, Chung DOB: 01/01/1967 | S5130 | 09/18/2019 11:00:54 AM | 09/18/2019 11:30:54 AM | 0.50 | 09/18/2019 1:20:59 PM | 09/18/2019 1:23:58 PM |
| | Peter, Cliff DOB: 01/23/1961 | S5130 | 09/18/2019 2:05:26 PM | 09/18/2019 2:35:26 PM | 0.50 | 09/18/2019 1:46:27 PM | 09/18/2019 1:48:59 PM |
| | John, Chung DOB: 01/01/1967 | S9122 | 09/18/2019 11:00:54 AM | 09/18/2019 11:30:54 AM | 0.50 | 09/18/2019 1:20:59 PM | 09/18/2019 1:23:58 PM |

© Copyright 2017 - 2019 Tellus LLC

5. Click the **Export** dropdown and select the format for your report.

TELLUS English TELLUSDEMO Provider Vicki Rouse

Reports > Time Log

Start Date: 2020-05-07 End Date: 2020-05-07

PDF

Excel (Paginated)

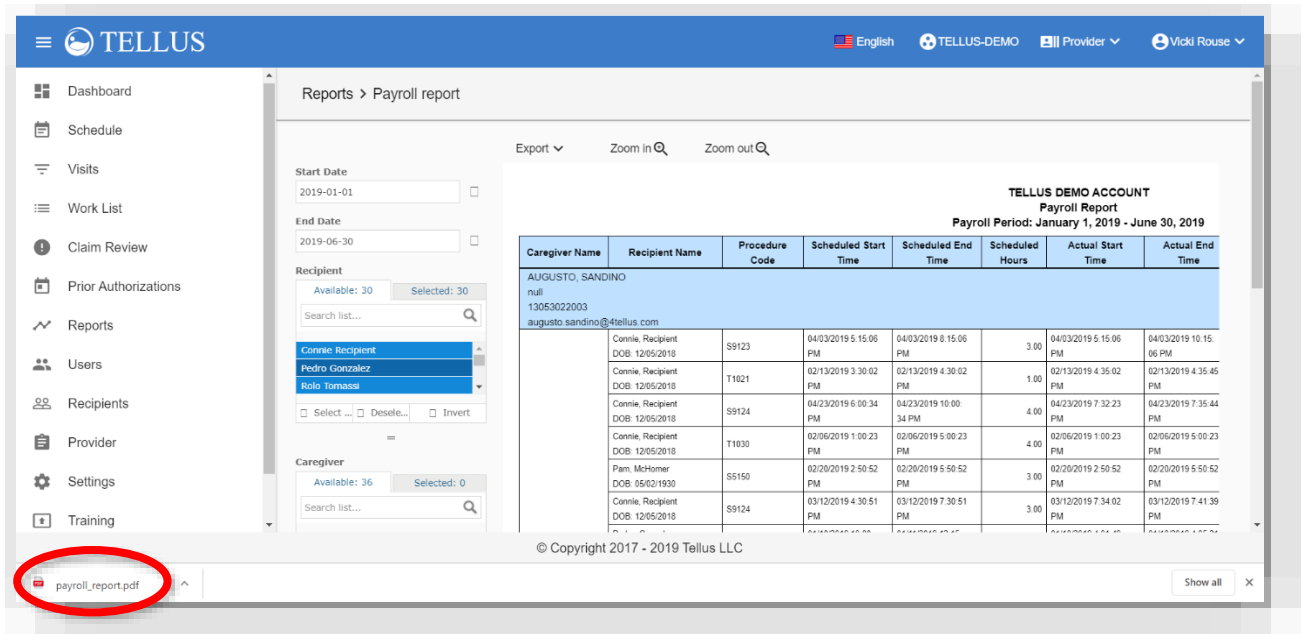
XLSX (Paginated)

TELLUS DEMO ACCOUNT
Time Log
Time Log: May 7, 2020 - May 7, 2020

| Recipient Name | Payer ID | Procedure Code | Scheduled Start Time | Scheduled End Time | Scheduled Hours | Actual Start Time | Actual End Time |
|----------------------|--------------|----------------|------------------------|------------------------|-----------------|------------------------|------------------------|
| Dale Carr | Chris Barker | AETH | 05/07/2020 12:20:21 PM | 05/07/2020 12:50:21 PM | 0.50 | 05/07/2020 12:20:21 PM | 05/07/2020 12:50:21 PM |
| Conrado Caducio | Peter Parker | AETH | 05/07/2020 12:26:22 PM | 05/07/2020 2:26:22 PM | 2.00 | 05/07/2020 12:26:22 PM | 05/07/2020 2:26:22 PM |
| Dale Carr | Aaron Becker | AETH | 05/07/2020 5:05:12 AM | 05/07/2020 5:58:12 AM | 0.75 | 05/07/2020 7:30:12 AM | 05/07/2020 8:30:12 AM |
| Grand Totals: | | | | | 3.25 | | |

© Copyright 2017 - 2020 Tellus LLC

6. When the report is downloaded, it will appear at the bottom left of your screen.



Reports > Payroll report

Export Zoom In Zoom out

Start Date: 2019-01-01

End Date: 2019-06-30

Recipient: Available: 30 Selected: 30

Caregiver: Available: 36 Selected: 0

TELLUS DEMO ACCOUNT
Payroll Report
Payroll Period: January 1, 2019 - June 30, 2019

| Caregiver Name | Recipient Name | Procedure Code | Scheduled Start Time | Scheduled End Time | Scheduled Hours | Actual Start Time | Actual End Time |
|--|--------------------------------------|----------------|-----------------------|------------------------|-----------------|-----------------------|------------------------|
| AUGUSTO, SANDINO null 13053022003 augusto.sandino@4tellus.com | | | | | | | |
| | Connie, Recipient DOB: 12/05/2018 | S9123 | 04/03/2019 5:15:06 PM | 04/03/2019 8:15:06 PM | 3.00 | 04/03/2019 5:15:06 PM | 04/03/2019 10:15:06 PM |
| | Connie, Recipient DOB: 12/05/2018 | T1021 | 02/13/2019 3:30:02 PM | 02/13/2019 4:30:02 PM | 1.00 | 02/13/2019 4:35:02 PM | 02/13/2019 4:35:45 PM |
| | Connie, Recipient DOB: 12/05/2018 | S9124 | 04/23/2019 6:00:34 PM | 04/23/2019 10:00:34 PM | 4.00 | 04/23/2019 7:32:23 PM | 04/23/2019 7:35:44 PM |
| | Connie, Recipient DOB: 12/05/2018 | T1030 | 02/06/2019 1:00:23 PM | 02/06/2019 5:00:23 PM | 4.00 | 02/06/2019 1:00:23 PM | 02/06/2019 5:00:23 PM |
| | Pam, McHomer DOB: 05/02/1930 | S5150 | 02/20/2019 2:50:52 PM | 02/20/2019 5:50:52 PM | 3.00 | 02/20/2019 2:50:52 PM | 02/20/2019 5:50:52 PM |
| | Connie, Recipient DOB: 12/05/2018 | S9124 | 03/12/2019 4:30:51 PM | 03/12/2019 7:30:51 PM | 3.00 | 03/12/2019 7:34:02 PM | 03/12/2019 7:41:39 PM |

© Copyright 2017 - 2019 Tellus LLC

payroll_report.pdf Show all

7. Click the download indicator to open the report.

Related Topic

- [Generating a Report](#)