

Mobile Caregiver+

Provider Portal User Guide

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www.ntst.com

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1. System Requirements.

- Hardware and Software Requirements
- Mobile Device Management Requirements

The Mobile Caregiver+ software application is a web based SAAS solution that is supported on the current and two most recent versions of the most popular web browser platforms, as long as the developer continues to provide support such that the platforms meet EVV security requirements.

1.1. Hardware and Software Requirements

The Mobile Caregiver+ (MCG+) mobile application is supported on mobile devices running iOS and Android operating systems; the Mobile Caregiver+ Claim Console and the Mobile Caregiver+ Provider Portal are web-based applications that are supported on common Internet browsers, such as Edge, Chrome, Firefox, etc.

Mobile Caregiver+ software applications are supported on the current and two most recent versions of the following software platforms, as long as the developer continues to provide support to ensure that the application meets EVV security requirements.

EVV Hardware and Software Requirements	
Supported PC Operating Systems	<ul style="list-style-type: none"> ○ Windows OS (32 or 64 bit).
Supported Mobile Operating Systems	<ul style="list-style-type: none"> ○ iOS. ○ Android.
Supported PC & Mac Browsers	<ul style="list-style-type: none"> ○ Microsoft Edge. ○ Google. ○ Apple Safari. ○ Mozilla Firefox.
Supported Mobile Browsers	<ul style="list-style-type: none"> ○ Google Chrome. ○ Apple Safari .
Mobile Device Requirements	<ul style="list-style-type: none"> ○ Form Factor: Tablet or Smart Phone. ○ Operating System: Android or iOS (see above.) ○ Bluetooth required: No. ○ GPS required: Yes. ○ Voice support required: No. ○ Min memory of phone: No minimum. ○ Min storage of phone: 50 MB.

1.2. Mobile Device Management Requirements

If the Mobile Caregiver+ app is going to work with a mobile device management (MDM) solution, the MDM solution must be configured to allow access to the app.

Note: If listed as Optional below, EVV will still be possible. If listed as required, EVV will not function effectively without the privilege. Cellular data or Wi-Fi data is required, but a User does not need both.

MDM Access	Required/Optional	Reason
Camera	Optional	For User to take avatar picture.
Face ID (when available)	Optional	For biometric app login.
Fingerprint ID (when available)	Optional	For biometric app login.
Location Services	Required	For geo-location of visit check-in / check-out.
Photo Library	Optional	To allow User to select avatar picture.
Mobile Data	Required (unless User accesses internet only via Wi-Fi network)	For internet access.
Wi-Fi Data	Required (unless User accesses internet only mobile network)	For internet access.
File Storage	Required	For local encrypted storage of working data.

2. Overview

[Terminology](#)

[Acronyms](#)

[Commonly Used Icons and Controls](#)

[Configuring Time Entries using the Clock Icon](#)

[Configuring Date entries using the Calendar Icon](#)

On December 13, 2016, the 21st Century Cures Act was signed into law. Section 12006(a) of the bill directs states to require the use of an EVV (Electronic Visit Verification) system for Medicaid-provided personal care services and home health services.

The technology required by the 21st Century Cures Act for personal and home health care must be able to electronically record:

- Date of service.
- Time the service begins and ends.
- Location where the service starts and ends.
- Type of service that is rendered.
- Name of the individual providing the service.
- Name of the individual receiving the service

Providers can use the Mobile Caregiver+ Provider Portal and mobile application to electronically schedule visits and record service data required by the 21st Century Cures Act.

2.1. Terminology

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

- **Provider Administrator (Admin):** A Mobile Caregiver+ User role that grants a User full access to all available features and functions of the Provider's Mobile Caregiver+ Provider Portal. The Fiscal Agent and Fiscal Intermediary roles also grant Users the same access privileges as an Administrator. Users assigned the role of Provider Admin, Fiscal Agent, or Fiscal Intermediary will have access to data for all Users and Recipients that are enrolled in a common Provider Agency. Depending on the Payer and Program, Provider Admins may have access rights to Manage some, or all, objects in an agency's Provider Portal.

Note: Multiple User roles can be assigned to a single User account. For example, if a User works in an office as a Provider Admin and assists in providing coverage for Caregivers, the User must be assigned both the Provider Admin Role and the Caregiver Role.

- **Billing:** A Mobile Caregiver+ User role that grants a User limited access to the claims processing features and functions of an agency's Mobile Caregiver+ Provider Portal. The Biller Role can be assigned to contractors to allow them to effectively process claims, while limiting access to other confidential data.
- **Caregiver:** A limited Mobile Caregiver+ User Role that allows Users to install and login to the Mobile Caregiver+ app to complete scheduled visits. The Caregiver User role is usually assigned to the following: Live-in Service Providers, Rendering Providers, Billing Providers, Home Health Aides, Adult Daycare Providers, Providers, Community Mental Health Providers, Agency Providers, PDS Employees, Independent Providers, Service Providers, Participant-Directed Service Providers, Personal Care Providers, Group Home Providers, Direct Care Workers, Direct Service Providers, Non-Agency Providers, Self-Directed.
- **Healthcare Common Procedure Coding System (HCPCS):** HCPCS is a standardized healthcare coding system that is used primarily to identify services provided, also known as Service Description, Billing Codes, Procedure Codes, and Codes.
- **Service Code:** A code, which can be a combination of letters and numbers, which represents a healthcare service conducted (see also HCPCS codes). Payers assign Service Codes to represent billable healthcare.
- **Modifier:** Supplement to the HCPCS Codes/Service Codes) A two-character code that can be added to standard HCPCS codes to provide additional details about a

service (when applicable) provided by a Caregiver; modifiers can be used to identify non-standard services, such as group therapy. Not all Service Codes have modifiers.

- **Agency:** A business that is established and which employs individuals to render care, e.g., a traditional Home Health Agency, a Fiscal Management Agency (FMA), a Provider Agency, or a Billing Provider.
- **Payer:** The health Plan or organization that provides payment to the Caregiver or Agency for services provided to Recipients by Caregivers.
- **Prior Authorization/Service Authorization:** A method through which 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 or care is also known as a Client, Participant, Individual, Family Member (child, parent, spouse, etc.), PDS Employer, or Beneficiary.
- **Schedule:** A Plan for rendering services, which includes pre-planned visits. Visits can be planned/scheduled by Administrators for Caregivers to provide services to Recipients. In some environments, Caregivers may be responsible for scheduling visits.
- **Visit:** A scheduled date, time, and place for a Caregiver to provide services to a Recipient.








Note: The screenshots included in this user guide display mock data and do not include any PHI.

2.2. 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.
MCG+	Mobile Caregiver+

2.3. Commonly Used Icons and Controls

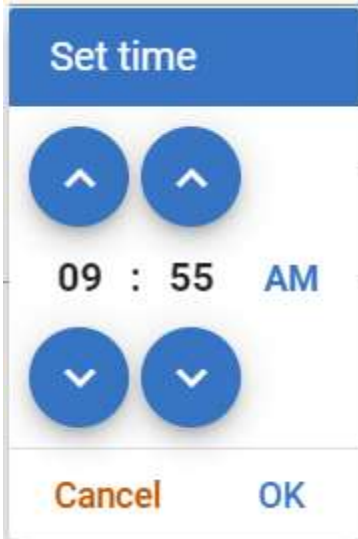
Conventional Icons Used in this Document:

Icon	Description
	<p>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.</p>
	<p>View Only: Indicates that an object is read-only; Users cannot or have limited capability to modify the object’s properties or settings.</p>
	<p>Edit: Indicates an object is editable. Users can modify the object’s properties or settings.</p>
	<p>Actions: Click the Actions icon to view a list of available submenu options (shortcuts).</p>
	<p>Search: Allows Users to perform Keyword searches. Click on the Search icon to open a search field.</p>
	<p>Reload: Refreshes the active screen or sub-screen with the most current EVV data. Some screens have multiple Reload icons, which are used to refresh individual subsections.</p> <p>Refresh times for the Dashboard, Users, and Schedule can be set using the Settings option.</p>
	<p>Clock: Allows Users to enter and/or edit values in time data fields. Click the Clock icon to enter or edit field values. See Configuring Time Entries using the Clock Icon for detailed instructions on setting time using this icon.</p>

2.4. Configuring Time Entries using the Clock Icon

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


1. Click the clock icon, 🕒, to open the Set time dialog box.

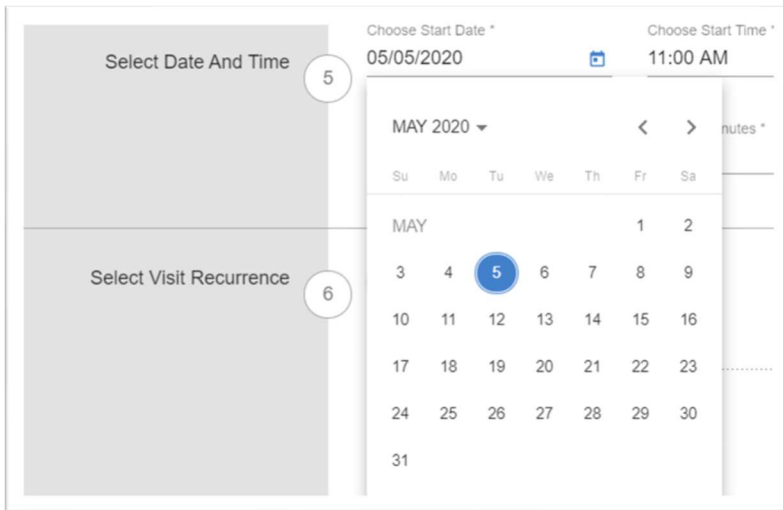


2. Use the up and down arrows to enter/set the time.
3. Click **AM** or **PM** to toggle between morning and afternoon.
4. Click **OK** to complete the entry and close the Set time dialog box.

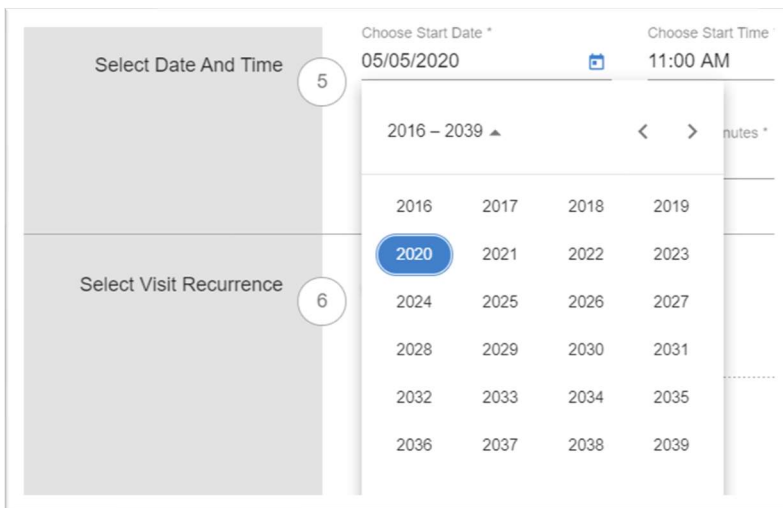
2.5. Configuring Date entries using the Calendar Icon

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

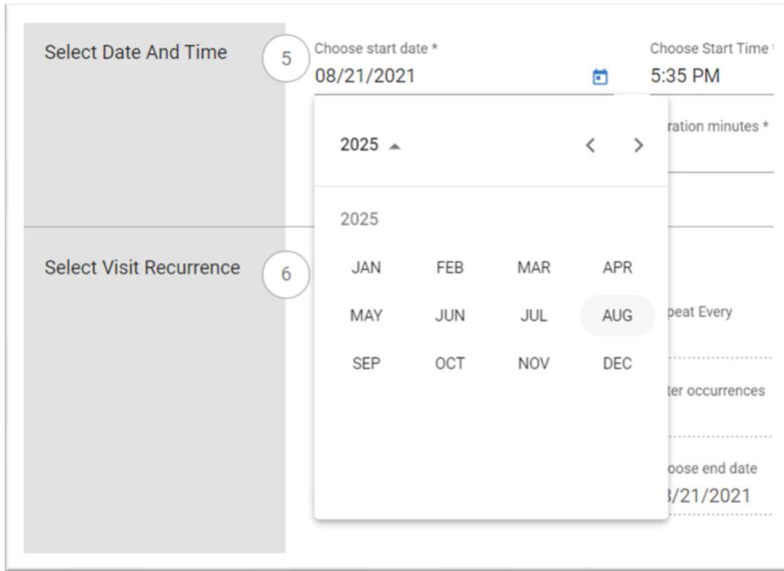
1. Click the calendar icon, , to open the edit Calendar dialog box; it defaults to the current year, month, and day.



2. To change the year, click the current month and year to display a list of years.



3. Click on the year you want to select. You may have to use the left or right scroll arrows to navigate to the correct year.



Select Date And Time 5 Choose start date * 08/21/2021 Choose Start Time * 5:35 PM

Select Visit Recurrence 6

2025

2025

JAN	FEB	MAR	APR
MAY	JUN	JUL	AUG
SEP	OCT	NOV	DEC

ration minutes *

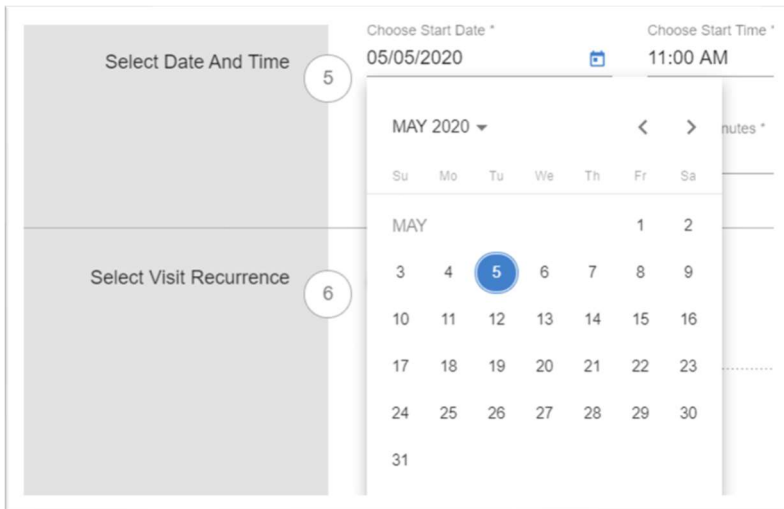
Repeat Every

ter occurrences

Choose end date

/21/2021

4. Click on the month to select it.



Select Date And Time 5 Choose Start Date * 05/05/2020 Choose Start Time * 11:00 AM

Select Visit Recurrence 6

MAY 2020

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

minutes *

5. Click on a date to select it.





3. Getting Started

[Registering your Provider Account](#)

[Entering Provider Demographic Details and Designated Provide Amin Email Address](#)

[Post-Registration](#)

[First Time Logging in to the Mobile Caregiver+ Provider Portal](#)

[Mobile Caregiver+ Designated Provider Admin User Account](#)

[Mobile Caregiver+ User Account Access Rights](#)

[Logging In](#)

[Resetting Forgotten Password](#)

[Logging Out](#)



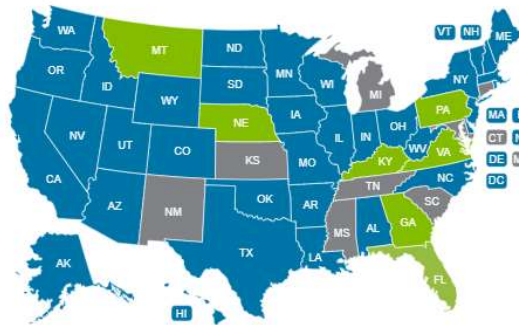
3.1. Registering your Mobile Caregiver Provider Account

In order to use the Mobile Caregiver+ Provider Portal, all Provider Agencies must register their accounts with Netsmart; all Users must have registered Mobile Caregiver+ User accounts to log in to the Mobile Caregiver+ Provider Portal.

To register your Provider Agency:

1. Open your Internet browser and navigate to the website mobilecaregiverplus.com.
2. Either click on the state you work in on the map or scroll down and click on the tile for your Payer.

Visit this page for links to all your client resources, including training webinars, user guides, and state-specific information.



Color	Description
■	States that Netsmart is currently doing business with as an aggregator
■	States doing business with other aggregators, but Netsmart can provide a connection to the aggregator
■	States that are undedicated or have a closed model

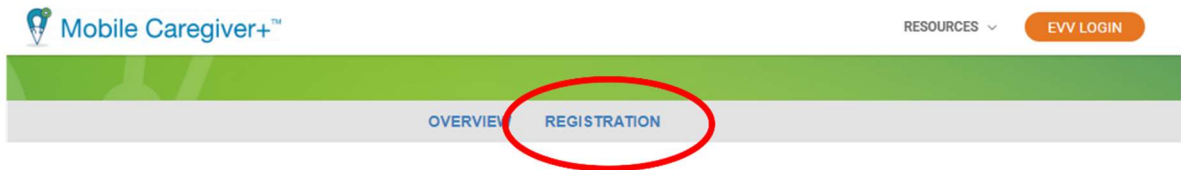
TRAINING AND IMPORTANT LINKS

Visit this page for links to all your client resources, including training webinars, user guides, and state-specific information.

<div style="background-color: #0072bc; color: white; padding: 10px; border-radius: 5px;"> <p>Training Webinars</p> <p><small>VIEW WEBINARS</small></p> </div>	<div style="background-color: #0072bc; color: white; padding: 10px; border-radius: 5px;"> <p>Georgia DCH</p> <p><small>VIEW PAGE</small></p> </div>	<div style="background-color: #0072bc; color: white; padding: 10px; border-radius: 5px;"> <p>Kentucky CHFS</p> <p><small>VIEW PAGE</small></p> </div>	<div style="background-color: #0072bc; color: white; padding: 10px; border-radius: 5px;"> <p>Nebraska DHHS</p> <p><small>VIEW PAGE</small></p> </div>
<div style="background-color: #0072bc; color: white; padding: 10px; border-radius: 5px;"> <p>Anthem Healthkeepers Plus Virginia</p> <p><small>VIEW PAGE</small></p> </div>	<div style="background-color: #0072bc; color: white; padding: 10px; border-radius: 5px;"> <p>Pennsylvania Highmark Wholecare</p> <p><small>VIEW PAGE</small></p> </div>	<div style="background-color: #0072bc; color: white; padding: 10px; border-radius: 5px;"> <p>Florida AHCA HH</p> <p><small>VIEW PAGE</small></p> </div>	<div style="background-color: #0072bc; color: white; padding: 10px; border-radius: 5px;"> <p>Support</p> <p><small>VIEW PAGE</small></p> </div>



3. Locate and click on the **Registration** tab.



YOUR PAYER'S MOBILE CAREGIVER + WEB PAGE

Caregiver+ to launch electronic visit verification (EVV) in 2020. Mobile Caregiver+ is a national EVV company that has successfully launched EVV with multiple states, managed care organizations, and thousands of providers. NTST has implemented EVV for their Home Health program.



How Do I Register For Mobile Caregiver+ EVV For AHCA Home Health?

Billing providers are required to register online to gain access to the Mobile Caregiver+ system. Click [REGISTER](#) to begin.

Does EVV Apply To Me?

Click [here](#) to see the list of waivers and services in scope for EVV.

How Do I Get Signed Up For Training?

Provider Admins can register on the mobilecaregiverplus.com/training site for provider admin portal training.

The training materials will cover functionalities of the NTS EVV system including:

- How to schedule services using the NTS EVV Dashboard
- Checking in and out using the NTS EVV Smart Phone Mobile Application
- Billing for services rendered using NTS EVV Claims Portal

Installing Mobile Caregiver+

Access the links below for information on how to remove the Tellus eVV app and install the new Mobile Caregiver+ app.

[Apple instructions](#)

[Android instructions](#)

The NTS EVV System may allow the use of EVV third-party integration for approved systems. Third-party integration means that home health providers who have an EVV system may continue to use it to capture and send EVV data to the EVV Claims system for billing. Providers who are interested in EVV third-party integration should contact the NTS EVV Customer Support Line toll-free at (1-833-2422-388) or via email: ahcaevv@mobilecaregiverplus.com.

For more information, visit mobilecaregiverplus.com/training

Why EVV?

The use of EVV is a Federal Law! In December 2016, Congress enacted the 21st Century Cures Act which requires states to implement EVV for Medicaid-financed Personal Care Services and Home Health Care Services.

4. Enter your billing Provider account information in the Self-Registration form. Depending on the Payer and state you work in, you will need the following information to self-register your agency:

Provider Tax ID #*	<input type="checkbox"/> Billing Provider Tax ID#
Provider ID #	<input type="checkbox"/> Provide Medicaid ID <input type="checkbox"/> CLS/PSS Provider ID#* <input type="checkbox"/> Payer Provider ID#
Zip #*	<input type="checkbox"/> Payer Provider ID#*



Mobile Caregiver+ Self-Registration


Getting Started: Self-Registering System Admin Guide

Download Now

PAYER EVV Self-Registration

For self-registration, please fill out the form below.


Provider Tax ID # *	<input type="text" value="Add Provider Tax ID # *"/>	→	<input type="checkbox"/> Billing Provider Tax ID#*
Provider ID #	<input type="text" value="Add Provider Medicaid ID # *"/>	→	<input type="checkbox"/> Provide Medicaid ID <input type="checkbox"/> CLS/PSS Provider ID#* <input type="checkbox"/> Payer Provider ID#*
Zip # *	<input type="text" value="Add Zip # *"/>	→	<input type="checkbox"/> Payer Provider ID#*

I'm not a robot 

- Click in the “I’m not a robot” CAPTCHA box.
- Click the blue **Submit** command to verify your billing Provider account:

Warning: For Provider Agencies that have already been registered, the system will display the error message, “cannot self-register Provider as it already has at least one admin created.” Please tcontact Contact the Client Support Team for further assistance.

Provider Tax ID # *	<input type="text" value="Add Provider Tax ID # *"/> 987654321
National Provider Identifier #	<input type="text" value="Add National Provider Identifier (NPI) #"/> 1234567890
Zip # *	<input type="text" value="Add Zip # *"/> 12345

I'm not a robot 

Can not self-register provider as it already has at least one admin created

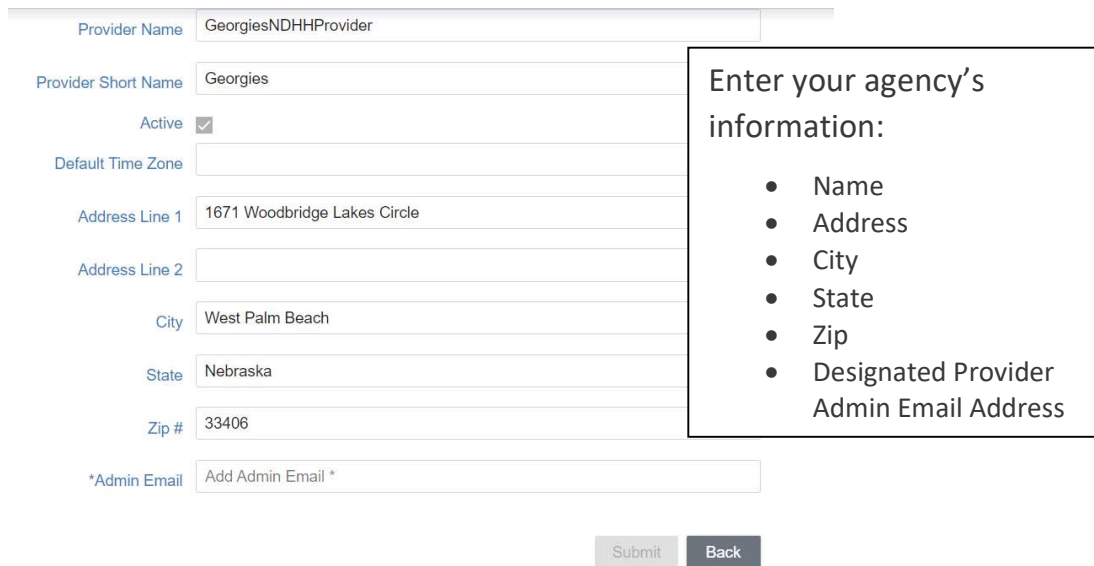


3.2. Entering Provider Demographic Details and Designated Provider Admin Email Address

1. Enter your agency's information in the Provider data form.

Note: The email address that is entered in the field labeled Admin Email will be used for the Designated Provider Admin account. Login credentials will be sent to the Designated Provider Admin via this email address.

2. Click the blue command button labeled **Submit**.



The screenshot shows a form with the following fields and values:

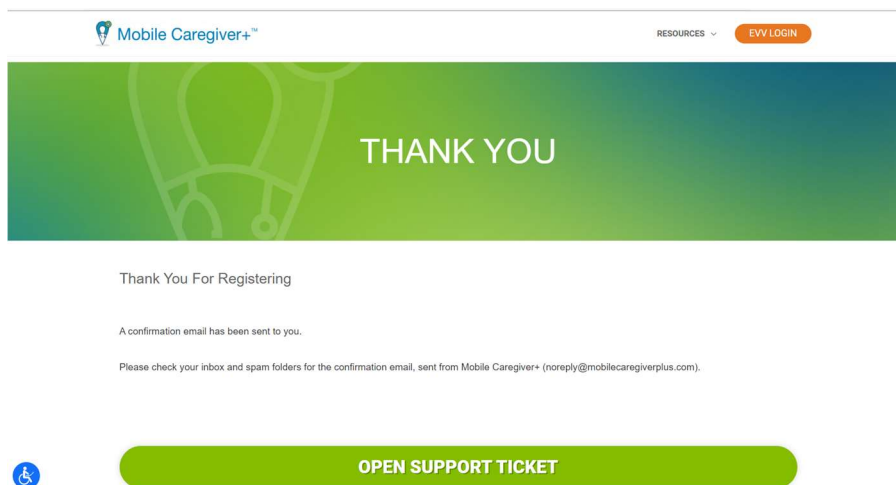
- Provider Name: GeorgiesNDHHProvider
- Provider Short Name: Georgies
- Active:
- Default Time Zone: (empty)
- Address Line 1: 1671 Woodbridge Lakes Circle
- Address Line 2: (empty)
- City: West Palm Beach
- State: Nebraska
- Zip #: 33406
- *Admin Email: Add Admin Email *

A callout box titled "Enter your agency's information:" lists the following required fields:

- Name
- Address
- City
- State
- Zip
- Designated Provider Admin Email Address

Buttons for "Submit" and "Back" are visible at the bottom of the form.

3. Registrants will be directed to the Mobilecaregiverplus.com website and receive a success message for registration.



4. Two emails will be sent from the email address “no-reply@ntst.com” to the Designated Provider Admin’s email address that was entered in the Provider Information form. One email will contain the Designated Provider Admin’s User ID and the other will contain the Password. You will have 36 hours to activate the invitation by logging in to your [Provider Portal](#). The invitation will expire after 36 hours.
5. If you do not see the email invitation, check your Spam or Junk email. Please follow the instructions provided in that email to complete your registration and access the application.

3.3. Post-Registration

After successfully registering, you will be able to log in to the Provider Portal by clicking the following link: mobilecaregiverplus.com.

Alternate Path – Registrants may exit out of the Self-Registration at any time, resulting in no registration and the inability to log in to the Provider Portal.

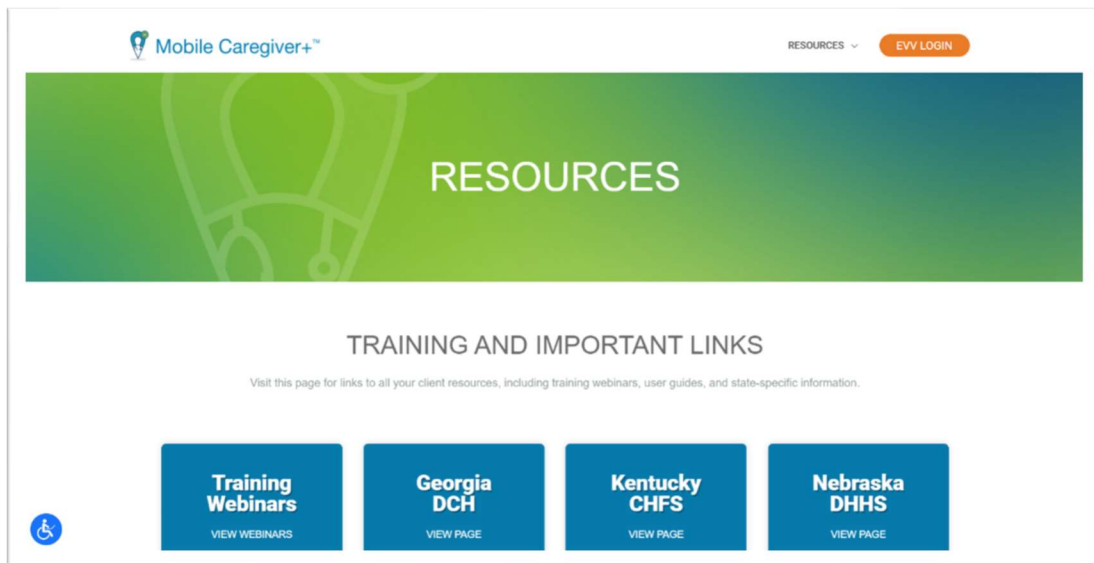
If a registrant enters invalid or incorrect data in one or more of the given fields, resulting in an error message when selecting "Submit," the registrant must correct this error or contact the Netsmart Client Support Team at 833-483-5587.

3.4. First Time Logging in to the Mobile Caregiver+ Provider Portal

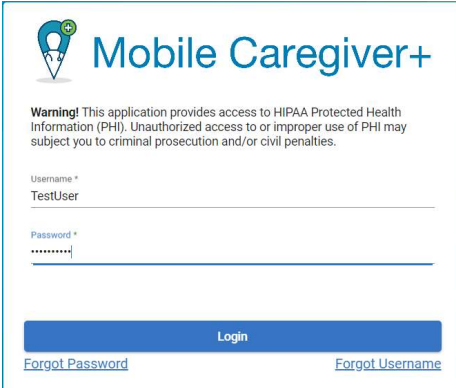
The Mobile Caregiver+ Claims Console is a web-based application. Providers can access the Mobile Caregiver+ Claims Console using the most common Internet browsers, i.e., Chrome, Edge, Firefox, etc.

Open your web browser. The best practice recommendation is for Providers to use Google Chrome.

1. Type mobilecaregiverplus.com in the address bar of your Internet browser and press the Enter key.
2. Click the orange **EVV LOGIN** command located in the upper right corner of the screen.




3. Enter your Mobile Caregiver+ User ID and Password.



4. Click **Login**.

Users logging in for the first time with temporary passwords will be prompted to create new passwords.

5. If prompted to change your temporary password, enter your Mobile Caregiver+ User ID, the temporary password, a new permanent password, and then re-enter the new password.

 Mobile Caregiver+

Use this screen to change your password. Enter your current password and then your new password twice

Enter username *
tuser 1

Enter current password * 2

Enter new password * 3

Confirm new password * 4

[Change Password](#)

6. Click the blue **Change Password** command.

3.5. Mobile Caregiver+ Designated Provider Admin User Accounts

All Users must have registered Mobile Caregiver+ User accounts to log in to the Mobile Caregiver+ Provider Portal.

Each agency must designate at least one Provider Administrator (Provider Admin) during the [registration](#) process. Depending on the Payer and the Program, Provider Admins may be responsible for one or more of the following:

- Creating and Managing Mobile Caregiver+ User Accounts.
- Creating and Managing Mobile Caregiver+ Recipient Accounts.
- Task management for billable services.
- Scheduling, monitoring, and management of visits.
- Running reports.

3.6. Mobile Caregiver+ User Account Access Rights

Mobile Caregiver+ User access rights are based on the role(s) assigned to User accounts; multiple roles can be assigned to a single User Account. For example, assigning a User the Provider Admin Role will grant the User access rights to view all PHI data, including, but not limited to, Recipients, Caregivers, and Provider Agency data.

A best practice recommendation is that Users be assigned roles that grant them the minimum access rights needed for their job role. For example, it is recommended that Providers who outsource billing to third parties assign those Users the Billing role; the Billing role grants Users limited access rights to EVV resources necessary for claims processing.

While Multiple roles can be assigned to a single account, Users should only have one MCG+ account. For example, if a User works in the Office as an Administrator and assists in providing coverage for Caregivers, the User will have to be assigned both the Provider Administrator role and the Caregiver role.

User Role	Description: Rights and Permissions
Provider Admin	<p>Users that are assigned the role of Provider Admin will have access rights to features and functions of their agency’s Mobile Caregiver+ Provider Portal.</p> <p>***Users that are assigned the role of Provider Admin will have access to all PHI data in a Provider Agency.***</p>
Billing	<p>Users that are assigned the role of Billing will have limited access rights to their agency’s Mobile Caregiver+ Provider Portal; the access rights granted to Users assigned the role of Billing will be limited to the features and functions required for claims processing, i.e., to view the Visits List, Work List items, Claim Review items, Prior Authorizations, and to process claims.</p>
Caregiver	<p>Users that are assigned the role of Caregiver will have limited access rights to log in to the Mobile Caregiver+ app and complete visits (record rendered services).</p> <p>Caregivers will only have access to PHI data for Recipients that have been assigned to them. To assign a Recipient to a Caregiver, a Provider Admins must schedule an initial visit with the Recipient and the Caregiver from the Provider Portal.</p>

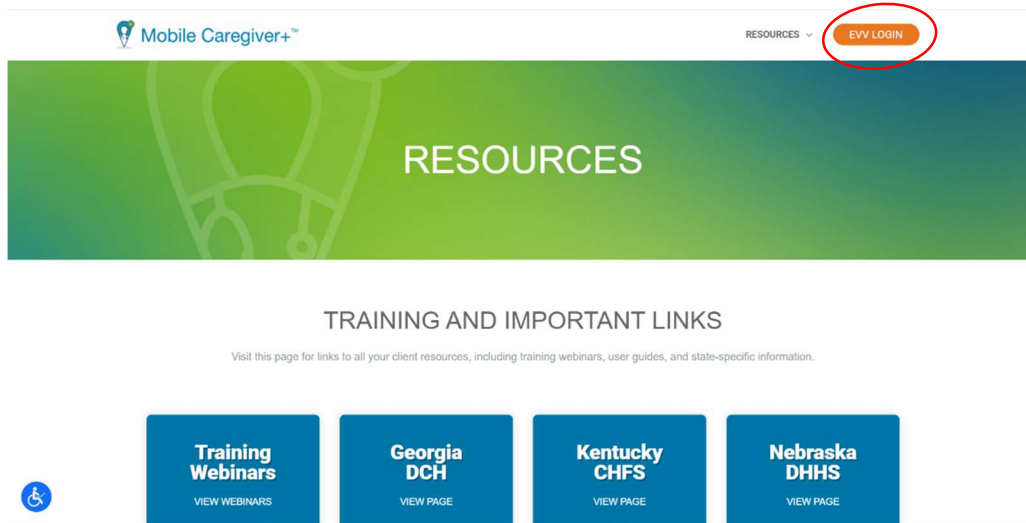


3.7. Logging In

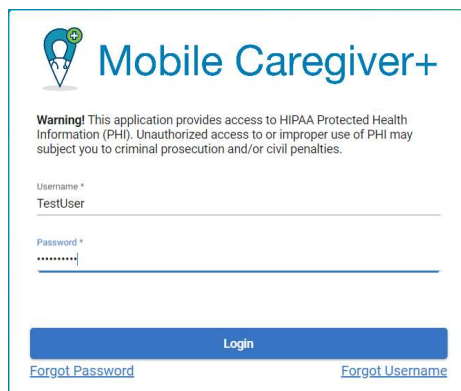
Note: Be sure pop-up blockers are turned off before logging in to the Mobile Caregiver+ Provider Portal.

You can access the Mobile Caregiver+ Provider Portal with most common web browsers.

1. Type *mobilecaregiverplus.com* in the address bar of your browser.



2. Click **EVV LOGIN** in the upper right-hand corner to display the Mobile Caregiver+ Provider Portal Login dialog box.
3. Enter your **Username** and **Password**.

A screenshot of the Mobile Caregiver+ login dialog box. It features the Mobile Caregiver+ logo at the top left. Below the logo is a warning message: 'Warning! This application provides access to HIPAA Protected Health Information (PHI). Unauthorized access to or improper use of PHI may subject you to criminal prosecution and/or civil penalties.' There are two input fields: 'Username *' with the text 'TestUser' and 'Password *' with masked characters. At the bottom, there is a blue 'Login' button, a 'Forgot Password' link, and a 'Forgot Username' link.

4. Click **Login**.

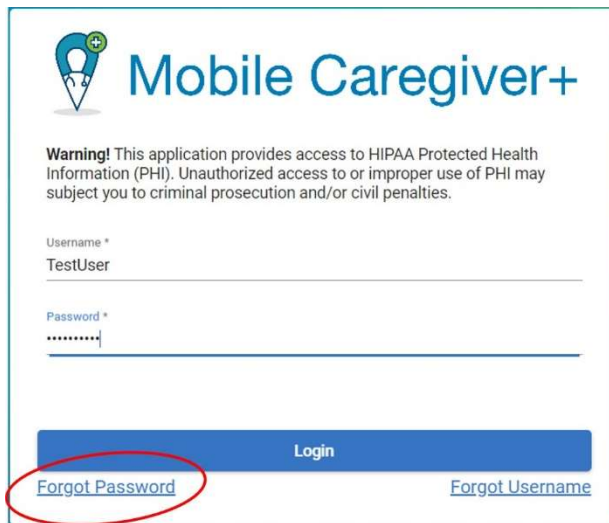
3.7.1. Resetting Forgotten Password

Users can reset forgotten passwords via the Mobile Caregiver+ Provider Portal web-based application.

To reset your User ID:

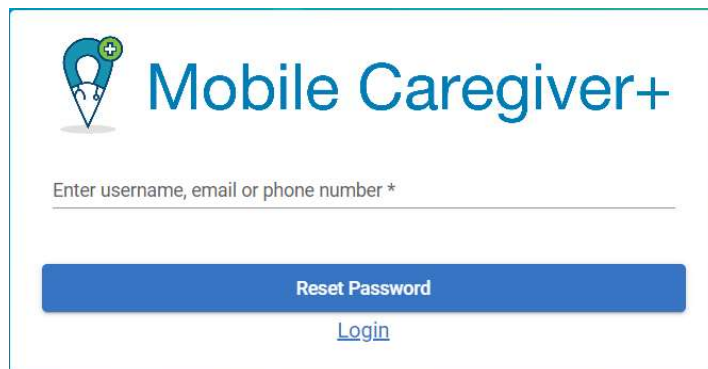
- i. From the Mobile Caregiver+ login screen, click **Forgot Password**.

*Note: If you do not remember your User ID, click **Forgot Username**.*



The screenshot shows the Mobile Caregiver+ login interface. At the top left is the logo. To its right is the text "Mobile Caregiver+". Below the logo is a warning message: "Warning! This application provides access to HIPAA Protected Health Information (PHI). Unauthorized access to or improper use of PHI may subject you to criminal prosecution and/or civil penalties." Below the warning are two input fields: "Username *" with the text "TestUser" and "Password *" with masked characters. At the bottom, there is a blue "Login" button. To the left of the button is a blue link "Forgot Password" which is circled in red. To the right of the button is a blue link "Forgot Username".

- ii. Enter your Username, email address, or phone number listed in your Mobile Caregiver+ User Profile.



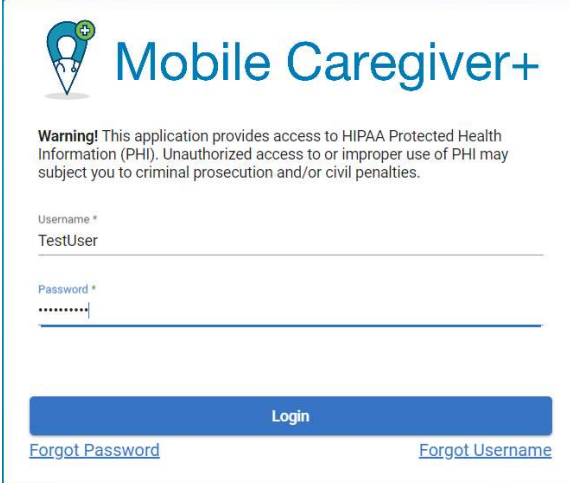
The screenshot shows the "Forgot Password" screen. At the top left is the logo. To its right is the text "Mobile Caregiver+". Below the logo is a text input field with the placeholder "Enter username, email or phone number *". Below the input field is a blue "Reset Password" button. Below the button is a blue link "Login".

- iii. Click Reset Password.

Note: If you enter a cell-phone number, the system will send a temporary password via a SMS text message. If you enter an email address, the system will send a temporary password via email. If you do not find the email in your

inbox, check your junk and spam folders for the email from the Mobile Caregiver+ System.


- iv. From the login screen, log in with your temporary password.



The login screen features the Mobile Caregiver+ logo at the top left. Below the logo is a warning message: "Warning! This application provides access to HIPAA Protected Health Information (PHI). Unauthorized access to or improper use of PHI may subject you to criminal prosecution and/or civil penalties." There are two input fields: "Username *" with the text "TestUser" and "Password *" with masked characters. A blue "Login" button is centered below the fields. At the bottom, there are two links: "Forgot Password" on the left and "Forgot Username" on the right.

Note: You will be prompted to change your password.

Enter your Mobile Caregiver+ User ID, the temporary password, a new permanent password, then re-enter the new password.



The change password screen features the Mobile Caregiver+ logo at the top left. Below the logo is the instruction: "Use this screen to change your password. Enter your current password and then your new password twice." There are four input fields, each with a circled number indicating the step: 1. "Enter username *" with the text "tuser"; 2. "Enter current password *" with masked characters; 3. "Enter new password *" with masked characters; 4. "Confirm new password *" with masked characters. A blue "Change Password" button is centered below the fields.

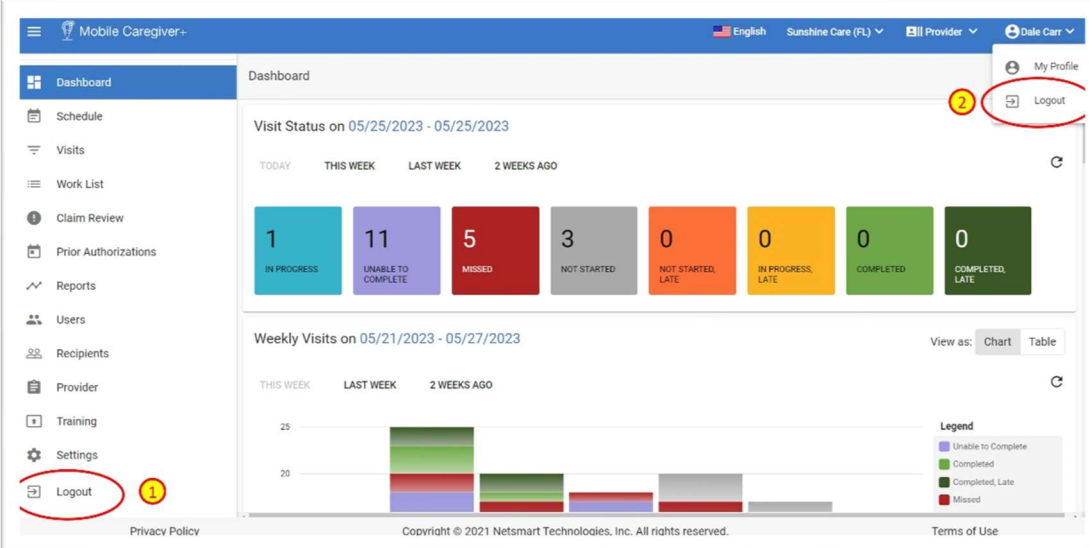
- v. Click Change Password.

3.8. Logging Out

If you are not actively using the system, it is best practice recommendation to log out. Logging out helps to ensure the security and protection of your organization's information, as well as the information of your Recipients and Caregivers. The system will automatically logout the active User after 30 minutes of inactivity.

There are two ways to log out of the Mobile Caregiver+ Provider Portal:

- From the Main Menu, click **Logout**.
- Or
- Click on your name in the upper right corner of the screen, then click **Logout**.



The screenshot displays the Mobile Caregiver+ Provider Portal dashboard. The main menu on the left includes options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Training, Settings, and Logout. The Logout button is circled in red and labeled with a yellow '1'. In the top right corner, the user's name 'Dale Carr' is visible, and a dropdown menu is open, showing 'My Profile' and 'Logout', with the Logout option circled in red and labeled with a yellow '2'. The dashboard content shows 'Visit Status on 05/25/2023 - 05/25/2023' with a grid of colored boxes representing different visit statuses: 1 IN PROGRESS, 11 UNABLE TO COMPLETE, 5 MISSED, 3 NOT STARTED, 0 NOT STARTED, LATE, 0 IN PROGRESS, LATE, 0 COMPLETED, and 0 COMPLETED, LATE. Below this is a 'Weekly Visits' bar chart for the period 05/21/2023 - 05/27/2023, showing visit counts for THIS WEEK, LAST WEEK, and 2 WEEKS AGO, categorized by status. A legend identifies the colors for 'Unable to Complete', 'Completed', 'Completed, Late', and 'Missed'. The footer contains 'Privacy Policy', 'Copyright © 2021 Netsmart Technologies, Inc. All rights reserved.', and 'Terms of Use'.



4. Layout and Navigation

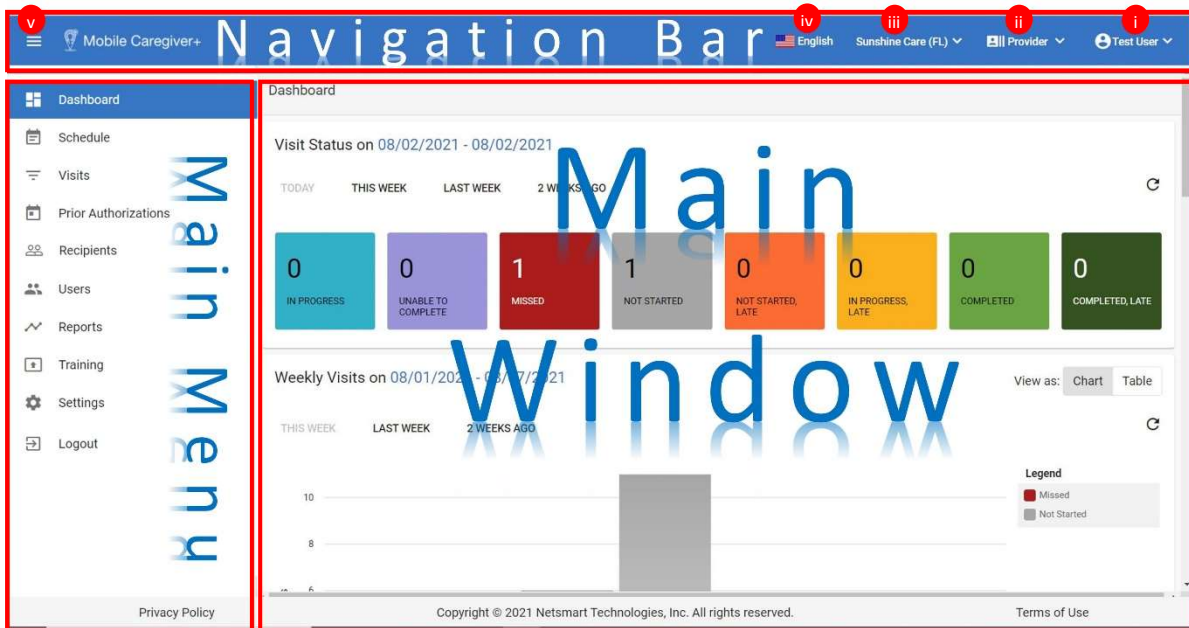
Navigation Bar

Main Menu

Main Window

The Mobile Caregiver+ Provider Portal is made up of three sections:

- The Navigation Bar
- The Main Menu
- The Main Window



Navigation Bar






Main Menu

Main Window



4.1. Navigation Bar


The Navigation Bar allows Users to view and configure application settings such as:

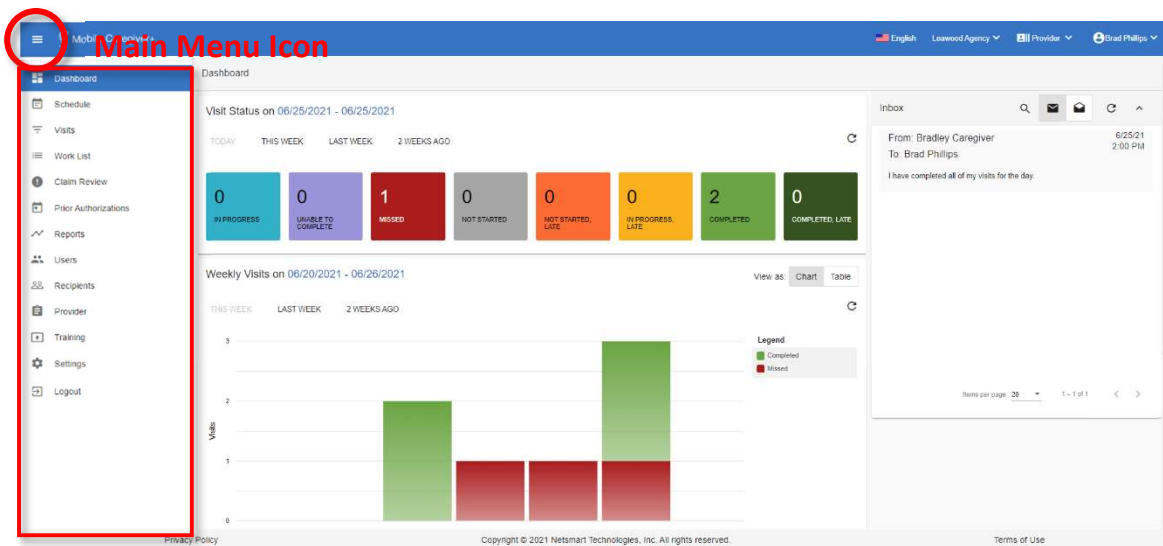
Navigation Bar	
Username 	Displays the first and last name of the active User. Users can click on the active User's name to access the My Profile option, where they can update their Mobile Caregiver+ User profiles or Log Out of the Mobile Caregiver+ Portal.
User Role 	Displays the assigned User role(s) of the active User; the system will display "Case Manager" if a Case Manager is logged into the Mobile Caregiver+ Portal.
Agency Name 	Displays the name of the active agency/location. A white drop-down list arrow indicates that the active User's account is linked to more than one agency. Users can click on the active agency to switch locations.
Active Language 	Displays and allows Users to select the active display language for the application.
Main Menu Button 	The Main Menu button allows Users to expand and collapse the Main Menu. The Main Menu will display submenu option labels when expanded.

4.2. Main Menu



The **Main Menu**, located on the left side of the screen, provides access to all of the features and functions of a Mobile Caregiver+ Provider Portal. User access to sub-menu options, as well as application features and functions, will vary based on the assigned role(s).


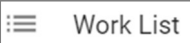

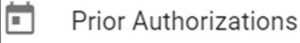



*Note: Provider Admins have access rights to all menu options. Users assigned the “Billing” role will have restricted access to the Claims Console menu options, i.e., **Visits, Work Lists, Claim Review, and Prior Authorizations.***


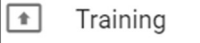


The Main Menu icon, , appears on the top left side of the Mobile Caregiver+ Claims Console. Click the Main Menu icon, sometimes called the “hamburger” icon, to expand the menu and see a description of all options. Click it again to collapse the Main Menu so that only the icons are visible.



The available Main Menu options for the Provider Portal are listed in the table below:

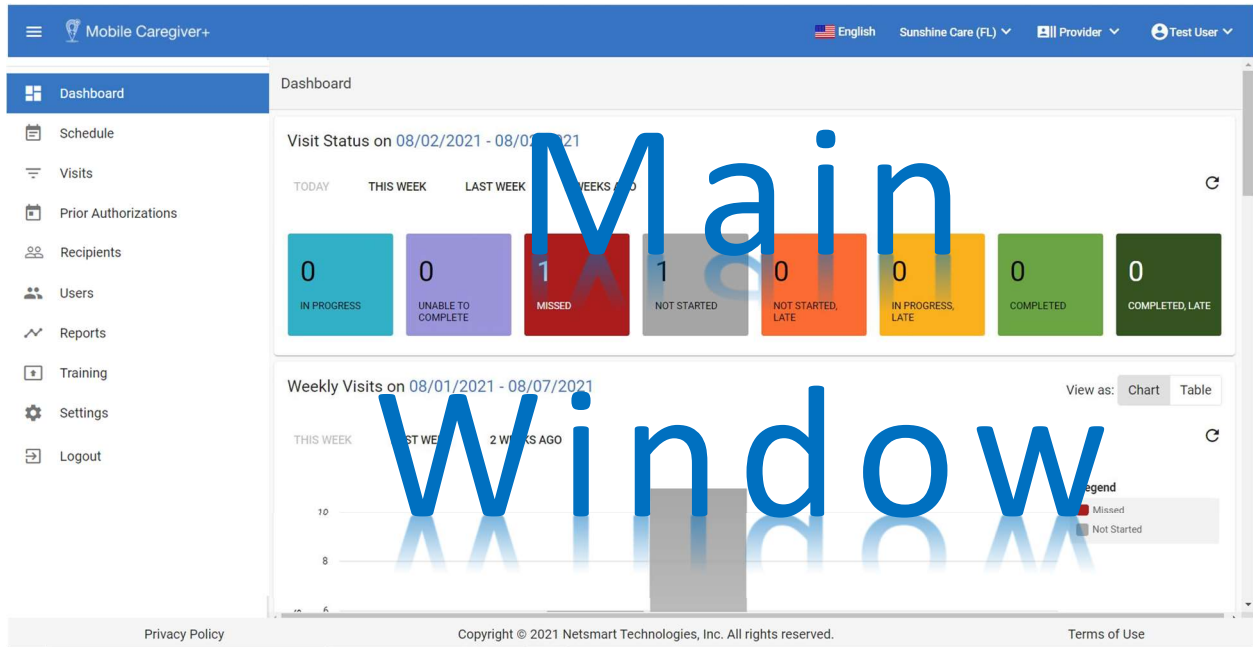
Main Menu Option	Description
Dashboard  Dashboard	Displays real-time and near-real-time EVV analytic data for scheduled visits.
Schedule  Schedule	Displays a calendar chart, which depicts all scheduled visits in a Provider’s Mobile Caregiver+ Portal. Providers can customize the calendar, review scheduled visits, and add new visits to the Provider

Main Menu Option	Description
	Portal. The Schedule menu option allows Providers to view existing schedules, check for availability, and add new visits.
Visits List 	Display all scheduled visits in a Provider’s Mobile Caregiver+ Portal. The Visits menu option can be used to search for and manage visits. The system will display all completed visits that have been completed using Mobile Caregiver+ as well as all visits sent from Alternate EVV Systems.
Work List 	Displays service records available to be processed and released for claim submission. The Work List menu option can be used to locate, review, remediate, and release services for claim submission.
Claim Review 	Displays a list chart that depicts status and remittance data for all service records that have been released from the Work List. Providers will use the Claim Review menu option to obtain status and remittance data for released service records, as well as adjust, void, and add Third Party Liability, (EOB) entries for Paid, and Partially Paid claims.
Prior Authorizations 	Displays a list chart that depicts Prior Authorizations that have been added to a Provider's Mobile Caregiver+ Portal. Providers can use the Prior Authorization menu function to locate and review Prior Authorizations in their Provider EVV Portals. Depending on the Payer and Program, some Providers may be able to add and/or edit Prior Authorizations in their Provider Portals.
Reports 	Displays a list of EVV Analytic Reports available in the Mobile Caregiver+ Provider Portal. Providers can use the Reports Menu Function to select, configure, run, and export reports from their Mobile Caregiver+ Portals.
Users 	Allows Providers to locate, add, edit, and manage Users in their Mobile Caregiver+ Portals. Depending on the Payer and Program. Providers may have full or limited capability to manage User settings/properties in their Provider Portal.
	Allows Providers to locate, add, edit, and manage Recipients in their Mobile Caregiver+ Portals. Depending on the Payer and Program, Providers may have full or limited capability to manage Recipient setting/properties in their Provider Portals.

Main Menu Option	Description
Provider 	Displays Provider Agency Settings; Depending on the Payer, some Providers may have access rights to edit their agency details, enter custom negotiated rates, and exercise other administrative rights.
Training 	Displays a hyperlink that Providers can click on to access the MCG+ Training Resources, including, but not limited to, signing up for webinars, user guides, video tutorials, etc.
Settings 	The Settings menu option allows Providers to configure how often the system automatically refreshes data displayed on the Dashboard, Users, and Schedule screens. Providers can enter the amount of time the system will wait before refreshing, updating data on the respective screens.
Logout 	Logs you out of the Mobile Caregiver+ Provider Portal.

4.3. Main Window

The Main Window, the largest pane located on the right side of the screen, is the workspace in which Users will interact with the application. The Main Window is used for inputting data and reviewing outputted data.



5. Dashboard

Accessing the Dashboard

Visit Status Report

Reviewing the Weekly Visits Report

Reviewing the Inbox

Reviewing the My Claims Work Queue Report

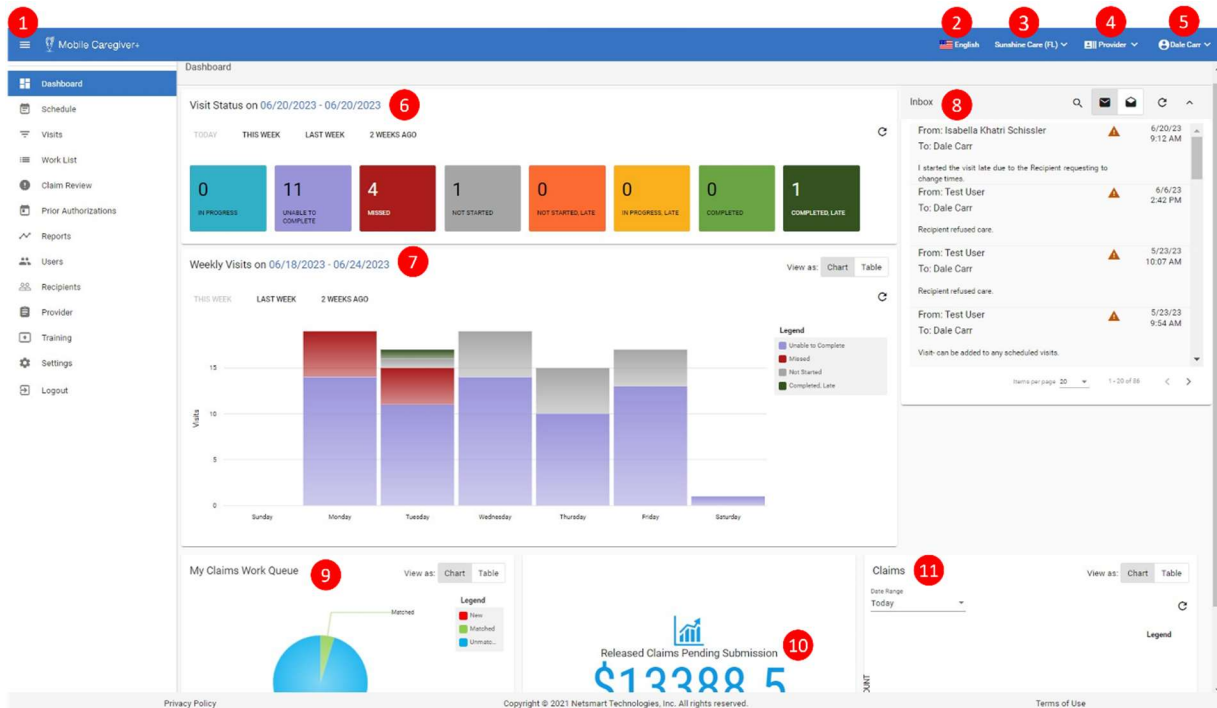
Reviewing the Released Claims Pending Submission Report

Reviewing the Claims Report

Viewing/Printing Visit Detail



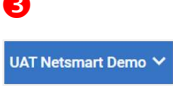






The Mobile Caregiver+ Provider Portal displays an overview of near real-time and/or real-time EVV analytics data in the Dashboard; for more information about the data displayed in the Dashboard, see the numbered items described in the table below the screenshot.


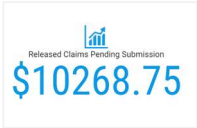

The following screenshots represent sections of the Dashboard and are displayed in the order in which they appear, from top to bottom.



The Dashboard will display real-time and near real-time information for the items listed in the table below:



Dashboard Item	Description
	The Main Menu button allows Users to expand and collapse the Main Menu. See Viewing the Main Menu for more information on the menu options.
	The Language icon allows Users to select the display language for the Provider Portal.
	The Agency Name displays the name of the active agency/location. Users can click on the current active agency to switch locations.
	The User Role displays the assigned User Role of the active User; the system will display Caregiver if a Caregiver logs into the Provider Portal.
	The Username displays the name of the active User. Click on the active User's name to access the My Profile option, where Users can update their Mobile Caregiver+ User profiles or Log Out of the Provider Portal.
	The Visit Status section displays near-to real-time status information for scheduled visits. Users can choose to view status data for scheduled visit for one of five date ranges: Today, This Week, Last Week or 2 Weeks Ago. The total number of visits for each visit status will be displayed in the respective colored tile. The colored tiles contain hyperlinks which provide direct access to the corresponding visits within the Visits List. Users can choose between a chart or table display.
	The Weekly Visits section displays daily EVV visit information for one of three weekly time ranges, This Week, Last Week, or 2 Weeks Ago. The colored stack chart contains hyperlinks, which provide direct access to the corresponding visits within the Visits List. Users can choose between a chart or table display.
	The Inbox displays HIPAA compliant messages that are sent to, and notes/alerts that are received from, Caregivers. The Inbox also displays alerts and notifications from Netsmart. Notes/Alerts contain a hyperlink to view visit details. Users cannot respond to messages in the Inbox but can send messages to Caregivers from the Users page.
	The My Claims Work Queue section displays analytic data for completed visit by statuses, New, Matched, and Unmatched. The chart contains

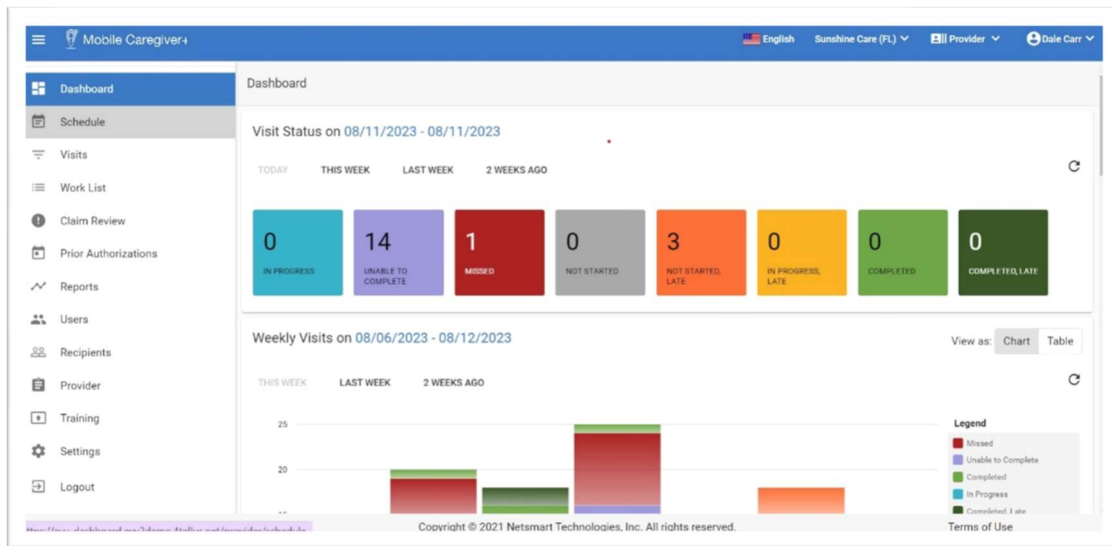
Dashboard Item	Description
	<p>hyperlinks which provide direct access to the Work List. Users can choose between a chart or table display.</p> <p>Disclaimer: This feature is only available for Providers that have Mobile Caregiver+ Claims Console Subscriptions.</p>
<p>9</p> 	<p>The Released Claims Pending Submission section displays the total estimated payment amount for all unsubmitted billable service records that have been released to Claim Reviews. The display contains a hyperlink which provides direct access to Claims Review.</p> <p>Disclaimer: This feature is only available for Providers that have Mobile Caregiver+ Claims Console Subscriptions.</p>
<p>11</p> 	<p>The Claims section displays status and remittance data for all billable service records that have been Released from the Work List. Providers can configure reporting parameters, including selecting the chart type and date range. Users can choose between a chart or table display. The report contains a hyperlink which provides direct access to Claims Review.</p> <p>Disclaimer: This feature is only available for Providers that have Mobile Caregiver+ Claims Console Subscriptions.</p>

5.1. Accessing the Dashboard

The Dashboard displays various EVV visit and claims analytic data for the active agency. The Dashboard screen is divided into horizontal sections. Each section displays EVV analytic data for the active agency.

To access the Dashboard:

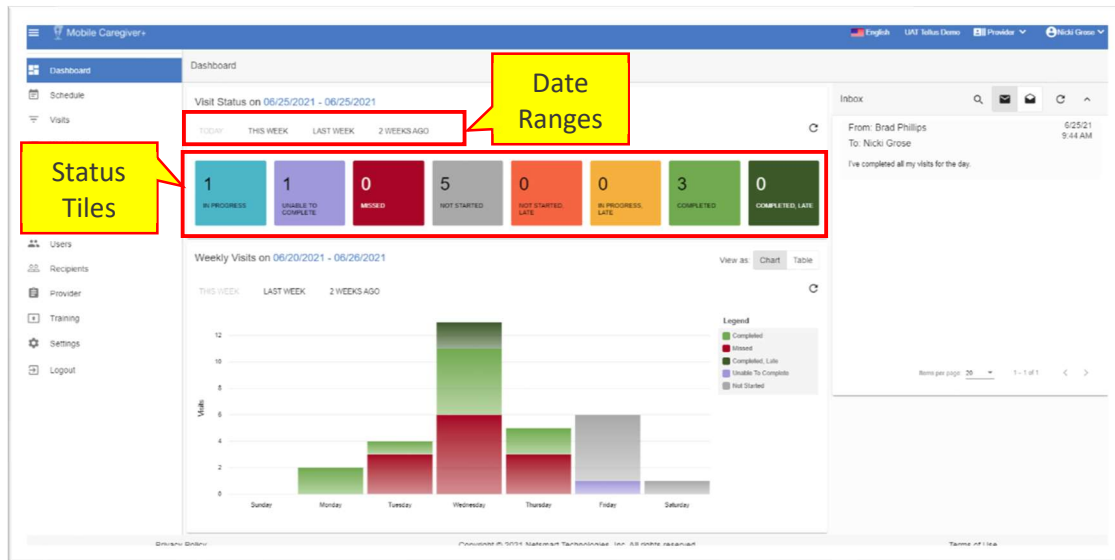
1. From the Main Menu, click the **Dashboard** option.




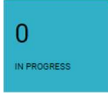

5.1.1. Visit Status Report

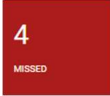

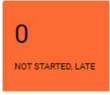
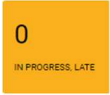


The **Visit Status Report** displays near real-time-to-real-time overview analytic status data for scheduled visits. There are eight colored tiles that display summary data for each type of visit status. Providers can select one of four date ranges, **TODAY, THIS WEEK, LAST WEEK, or 2 WEEKS AGO**, to view summary status data for all visits scheduled for the selected period. The example below shows visit statuses for visits scheduled for **Today**.

Visit Status Report

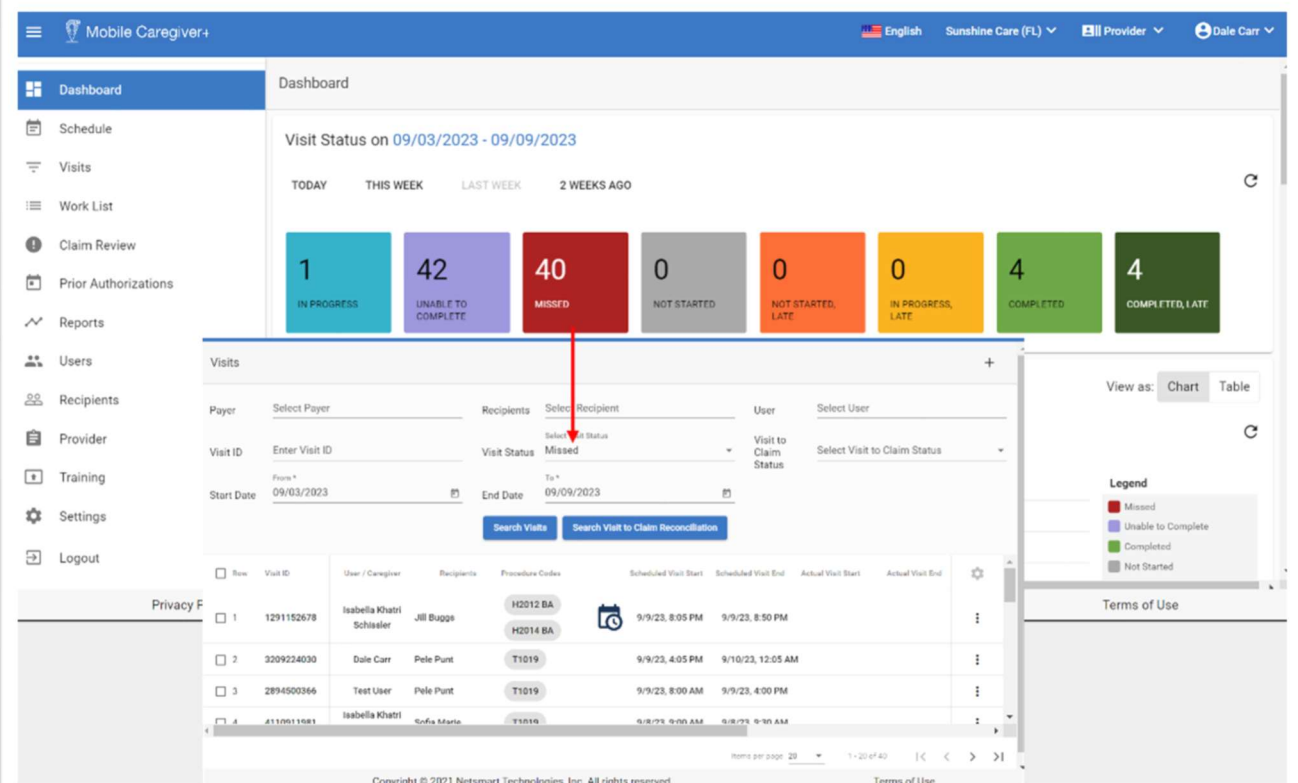


The “reload” icon, , allows Users to refresh the Visit Status chart with current real-time data. The system will display real-time and near real-time status data for scheduled visits.

Status	Description
In Progress 	The light blue tile displays the total number of scheduled visits that are currently in progress and estimated to be completed within the scheduled time, the scheduled end time has not passed.
Unable To Complete 	The purple tile displays the total number of scheduled visits that have been canceled.

Status	Description
Missed 	The burgundy tile displays the total number of scheduled visits that were not completed on the Mobile Caregiver+ Mobile Application. All visits that are completed without using the Mobile Caregiver+ Mobile Application will be labeled as Missed visits i.e., visits where the Caregiver forgot to log in, did not have the device, the device was broken, etc. Provider Admin can manually complete visits that occurred without the use of the Mobile Caregiver+ Mobile Application.
Not Started 	The gray tile displays the total number of visits that are scheduled for future dates, i.e., later in the current day, the next day, next week, etc.
Not Started, Late 	The orange tile displays the total number of scheduled appointments that have not been started at the scheduled <i>Start Time</i> , visits that are currently late (that should have already started).
In Progress, Late 	The yellow tile displays the total number of scheduled visits that are still being completed (in progress) past the scheduled <i>End Time</i> .
Completed 	The light green tile displays the total number of scheduled visits that were completed within the scheduled time.
Completed, Late 	The dark green tile displays the total number of scheduled visits that were completed after the scheduled <i>End Time</i> .

Users can click on any of the eight (8) colored status tiles to view a list of the corresponding visits in the *Visits* screen. The example below shows a list of Missed visits for Last week. Users may have to scroll down to see all visits.



The screenshot shows the Mobile Caregiver+ dashboard. At the top, there is a navigation bar with the logo, language (English), location (Sunshine Care (FL)), provider (Dale Carr), and user (Dale Carr). The left sidebar contains navigation options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Training, Settings, and Logout. The main content area is titled 'Dashboard' and displays 'Visit Status on 09/03/2023 - 09/09/2023'. Below this, there are filters for 'TODAY', 'THIS WEEK', 'LAST WEEK', and '2 WEEKS AGO'. A bar chart shows the following counts: 1 IN PROGRESS (blue), 42 UNABLE TO COMPLETE (purple), 40 MISSED (red), 0 NOT STARTED (grey), 0 NOT STARTED, LATE (orange), 0 IN PROGRESS, LATE (yellow), 4 COMPLETED (green), and 4 COMPLETED, LATE (dark green). A red arrow points from the '40 MISSED' bar to the 'Visits' section below. The 'Visits' section has a search form with fields for Payer, Recipients, User, Visit ID, Visit Status (set to 'Missed'), and Visit to Claim Status. It also includes date range filters for Start Date (From: 09/03/2023, To: 09/09/2023) and buttons for 'Search Visits' and 'Search Visit to Claim Reconciliation'. Below the search form is a table of visits with columns: Row, Visit ID, User / Caregiver, Recipients, Procedure Codes, Scheduled Visit Start, Scheduled Visit End, Actual Visit Start, and Actual Visit End. The table contains four rows of visit data. A legend on the right side of the dashboard identifies the colors used in the bar chart: Missed (red), Unable to Complete (purple), Completed (green), and Not Started (grey). At the bottom of the dashboard, there is a footer with 'Copyright © 2021 Netsmart Technologies, Inc. All rights reserved.' and 'Terms of Use'.

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

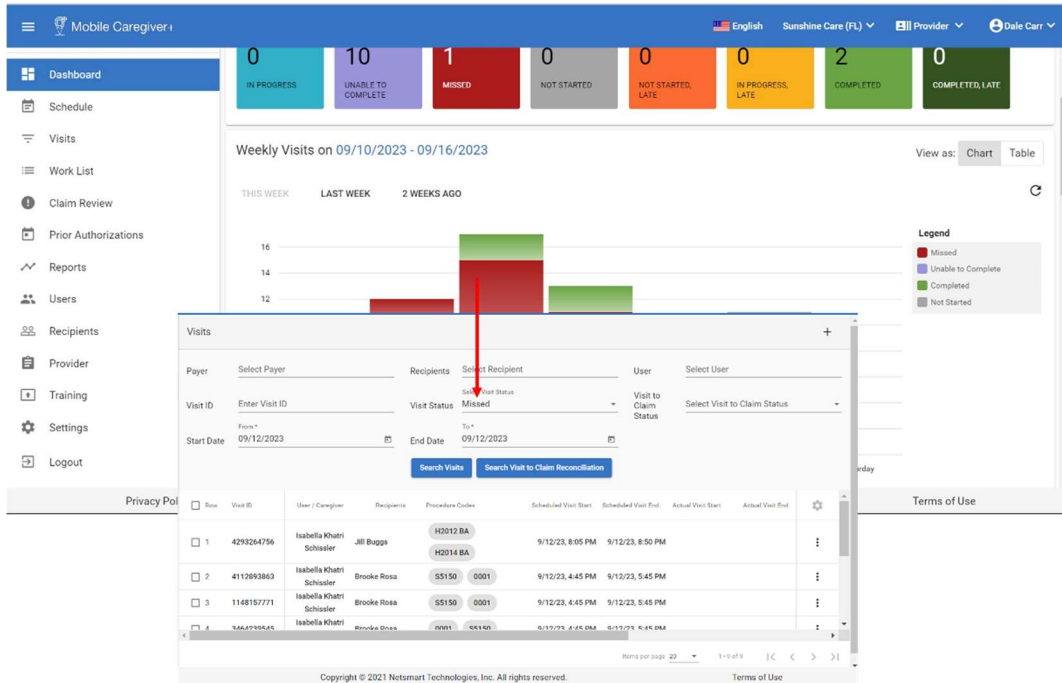


5.1.2. Reviewing the Weekly Visits Report

The weekly visit report displays daily analytic data for weekly time periods, i.e., **THIS WEEK, LAST WEEK, 2 WEEKS AGO**. Users can use the **View** tab to select a Chart or Table display for the report.

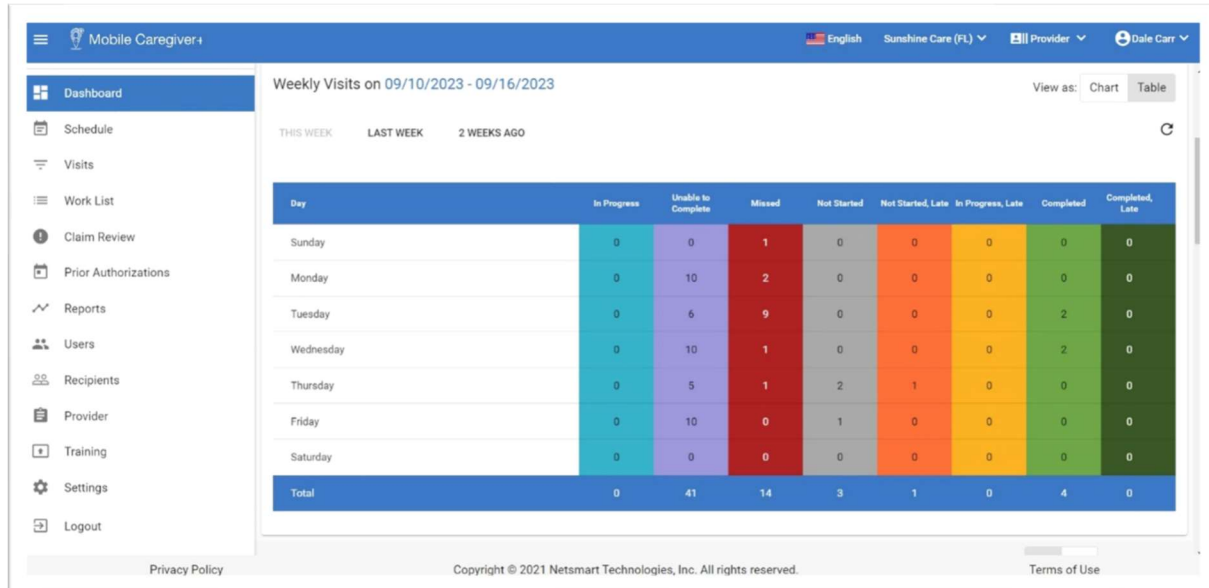
The Chart report depicts a stack chart with colored stacks representing the total number of daily visits based on the visit status.

Users can click on a colored stack to view the list of the corresponding visits in the Visits screen. The example below shows the list of corresponding Not Started, Late visits for Thursday of THIS WEEK that will be displayed in the Visits screen. Users may have to scroll down to view all visits in the Visits list.



Note: The Weekly Visits report displays a stack chart depicting daily status data for the selected weekly option (this week, last week, or 2 weeks ago). From the Weekly Visits report, you can click on any of the colored stacks within a day to view a list of the scheduled visits on the Visits List.





Note: The Table report depicts a list chart which displays the total number of visits by status for each day of the selected week. See [Viewing Visit Details](#) for more information on the Visits detail screen.

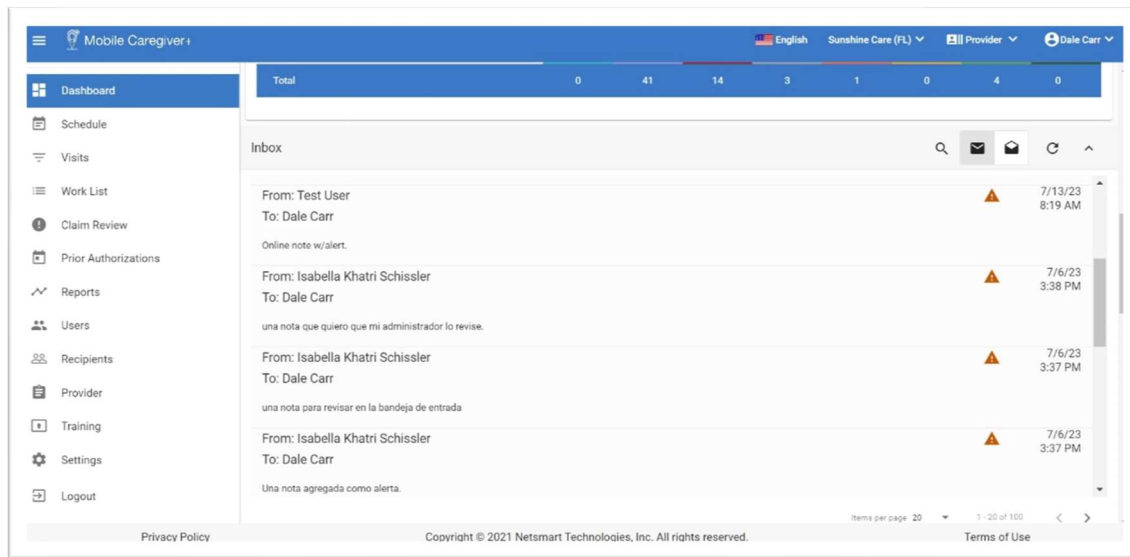



5.1.3. Reviewing the Inbox

The Inbox displays the following HIPAA compliant data:




- Text messages that Administrator(s) have sent to Caregivers.
- Recipient notes/alerts that Caregivers have sent to the Provider Admin.
- Notifications and Alerts sent from Netsmart.

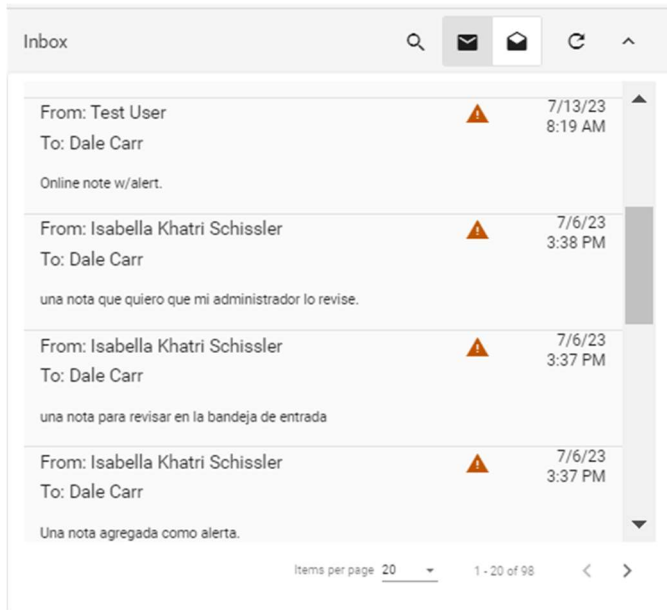
*Note: Visit notes created via the mobile app, where Caregivers check off the **Alert My Administrator** option, will appear in the Inbox on the Provider Portal. Administrators can click a note to read the full text.*




Data displayed on the **Dashboard**, including the **Inbox**, automatically refreshes every six hundred seconds by default. Users can change how frequently the **Inbox** refreshes by using the **Settings** menu option to configure the Message Auto-Refresh Timer. Users can manually refresh the **Inbox** data at any time by simply clicking the refresh icon, .

Users can configure the following Inbox settings:

- Filter to display only unread messages, the default view, by clicking the closed envelope icon, .
- Filter to display only opened messages, by clicking the open envelope icon, .
- Search for messages by clicking the magnifying glass icon, .
- Change the number of messages per page, by clicking the **Items per page** drop-down list box. Users can scroll through pages by clicking the forwards arrow or the backwards arrow.



Note: A yellow triangle with an exclamation mark, , indicates that the corresponding message is a note, an alert, which was sent by a Caregiver. Click a message to open it.



*Read the message and then click **Close** to return to the message list or click **Visit Details** to display the Visit Details screen shown below.*

Visit ✕

Status:	Unable to complete	Visit Status Detail:	OTHR, Other
Caregiver:	Test User	Notes:	Note required. ; Recipient refused care.
Recipients:	Peter Parker		

Missed Reason

Missed Visit Reason:	Other	Missed Visit Reason Note:	Note required.
Missed Visit Action Taken:	Rescheduled Different Day	Missed Visit Action Taken Note:	-

Claims: (1 item(s)) ^

Claim Status	Invoice ID #	Recipient
-		Peter Parker

Completed Tasks: (1 item(s)) ^

HCPCS Code/Mods	HCPCS Description	Tasks Description
S9122 -	Home health aide or certifie	Supervision Personal Care - General

Addresses:

Scheduled Visit Start:	May 23, 2023, 6:10:00 AM	Scheduled Visit End:	May 23, 2023, 7:10:00 AM
Actual Visit Start:	May 23, 2023, 10:06:01 AM	Actual Visit End:	-

[Print](#)

Note: The Visit Details form displays scheduling details for all scheduled visits; the form also displays actual visit data, including signature details, for completed visits.



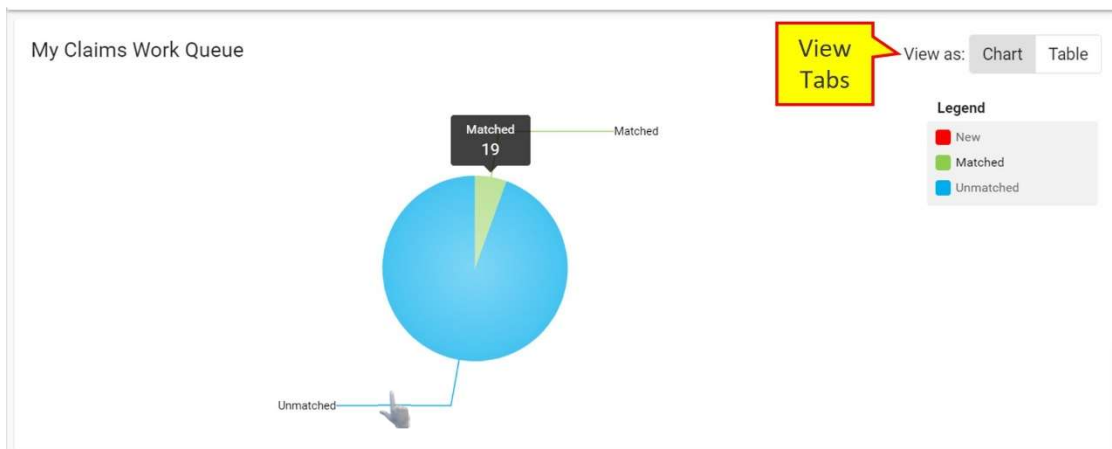
5.1.4. Reviewing the My Claims Work Queue Report

Disclaimer: This feature is only available for Providers that have Mobile Caregiver+ Claims Console Subscriptions.

The My Claims Work Queue Report displays relevant EVV service data and is intended for Providers that have Mobile Caregiver+ Claims Console subscriptions.

The My Claims Work Queue report displays screening and pre-adjudication results for billable service records in the Work List. Users can configure the system to display a Pie Chart or a Table of New, Matched, and Unmatched service records in the Work List.

- Hover the cursor over any section of the pie chart to see the actual number of claims represented by a slice.
- Click on a data series in a Chart/Table to view the corresponding list of billable service records in the Work List.



My Claims Work Queue

View as: Chart Table

Status	Amount	Percents
New	0	0.00%
Matched	19	3.68%
Unmatched	325	62.98%

5.1.5. Reviewing the Released Claims Pending Submission Report

Disclaimer: This feature is only available for Providers that have Mobile Caregiver+ Claims Console Subscriptions.

The Released Claims Pending Submission Report displays relevant EVV service data and is intended for Providers that have Mobile Caregiver+ Claims Console subscriptions.

The Release Claims Pending Submission Report displays an estimated payment amount, which is obtained by adding the Calculated Payment Amounts of each service record currently in Claim Review that is labeled as Released.

Click on the total estimated payment amount displayed to view the corresponding list of released service records in the Claim Review screen.



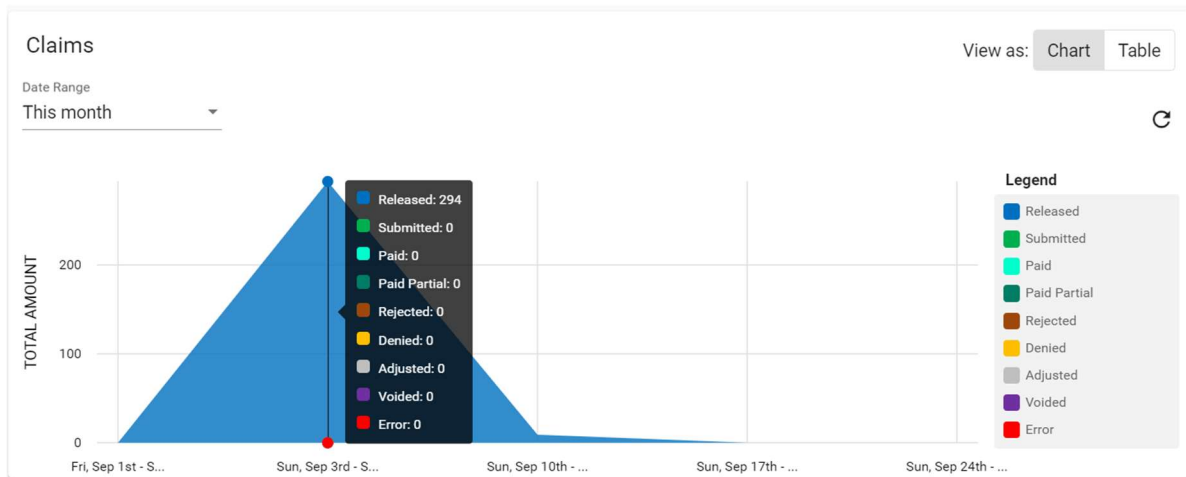
5.1.6. Reviewing the Claims Report

Disclaimer: This feature is only available for Providers that have Mobile Caregiver+ Claims Console Subscriptions.

The Claims Report displays relevant EVV service data and is intended for Providers that have Mobile Caregiver+ Claims Console subscriptions.

The Claims Report displays status and remittance data for all billable services that have been released from the Work List. Users can configure the system to display Chart or a Table report depicting all billable service records that have been released from the Work List i.e., Released, Submitted, Accepted, Rejected, Paid, Partially Paid, and Denied claims.

- Use the drop-down list arrow, located in the top left corner of the Claims section, to select a time range for the report, i.e., **Today**, **This week**, **Last week**, **This month**, **Last month**, or **Custom**. Users can select **Custom**, which will allow Users to configure custom start and end dates for the report; use the drop-down list to select a date range, and then click the refresh icon at right.
- Hover the cursor over any data point on the report to view a list of visits by status.



6. Schedule Calendar

Viewing the Schedule Calendar

Schedule View

Calendar View

General Navigation for the Schedule Calendar

Adding/Scheduling Visits

Section 1 - Select Recipient(s) Options

Section 2 - Select Caregiver Options

Section 3 - Select Services

Section 4 - Select Location

Section 5 - Select Date and Time

Section 6 - Select Visit Recurrence

Providers can use the Schedule Calendar to check for availability, as well as to view and confirm scheduled visits.

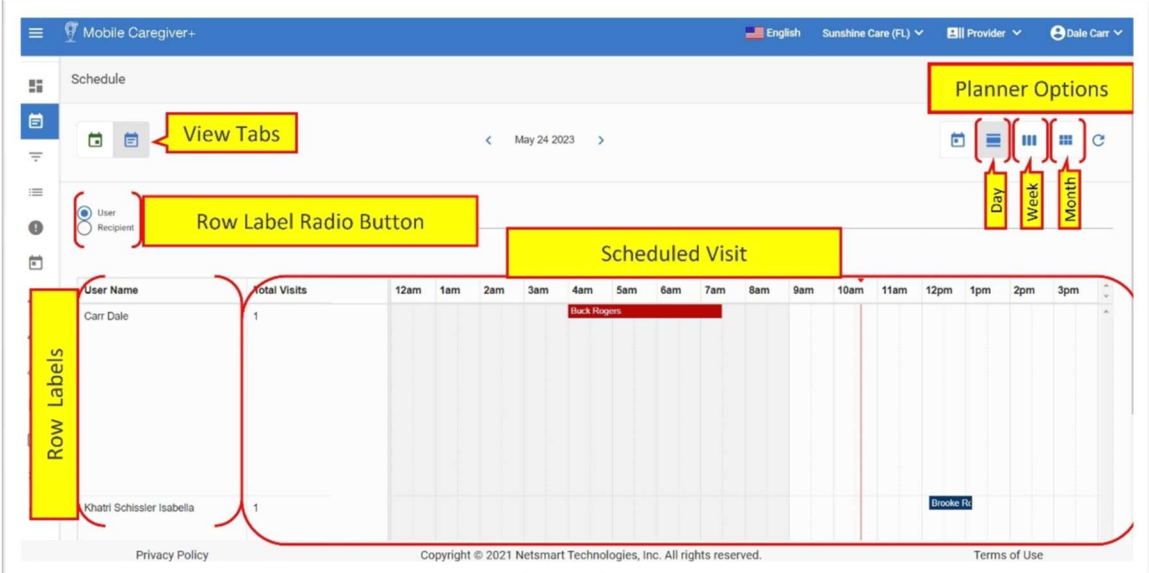
6.1. Viewing the Schedule Calendar

The Schedule Calendar displays a calendar chart, which depicts all scheduled visits in an agency’s Provider Portal. The Schedule menu option allows Providers to view existing scheduled visits, check for availability, and add new visits to their EVV Portal by clicking on the Add New Visit command, , located in the top-right corner of the screen.

To view the Schedule calendar:

1. From the Main Menu, click **Schedule**.

Note: By default, the system will display a daily calendar depicting scheduled visits for the current day; Users can choose either a Day planner, a Week planner, or a Month planner for the calendar.

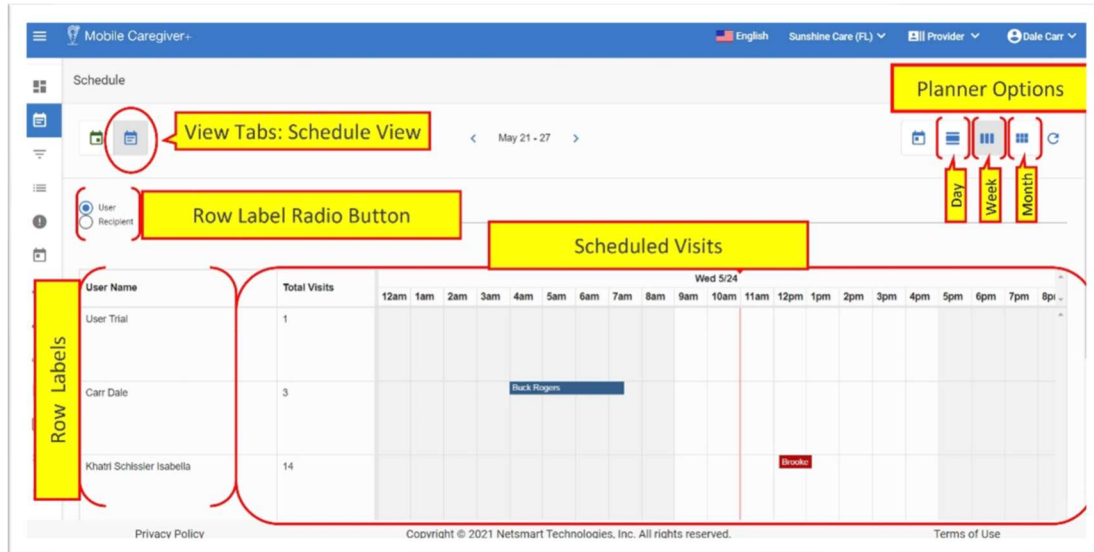


The screenshot shows the 'Schedule' interface in the Mobile Caregiver+ Provider Portal. The interface includes a top navigation bar with 'English', 'Sunshine Care (FL)', 'Provider', and 'Dale Carr'. The main content area displays a calendar for May 24, 2023. Annotations highlight key features: 'View Tabs' points to the calendar view icons; 'Planner Options' points to the 'Day', 'Week', and 'Month' view selectors; 'Row Label Radio Button' points to the 'User Recipient' selection; 'Scheduled Visit' points to the main calendar grid; and 'Row Labels' points to the user names in the left column. The calendar grid shows two rows: 'Carr Dale' with one visit at 4am labeled 'Rack Rogers', and 'Khatri Schissler Isabella' with one visit at 10am labeled 'Brooke Ft'. The footer contains 'Privacy Policy', 'Copyright © 2021 Netsmart Technologies, Inc. All rights reserved.', and 'Terms of Use'.

Note: There are two views for the Schedule: [Schedule 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](#).

6.1.1. Schedule View

Users can configure the Schedule Calendar to be displayed in Schedule View, which depicts a bar chart of all scheduled visits in an agency’s Mobile Caregiver+ Provider Portal. Users can switch to Schedule View by clicking the blue calendar icon in the upper left corner of the Schedule Calendar screen.

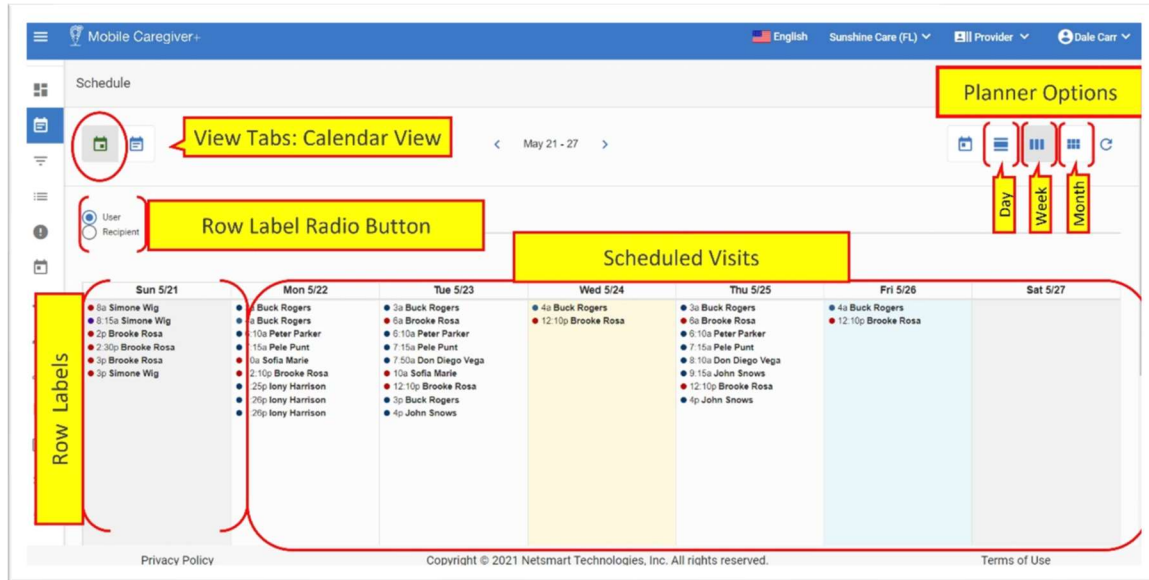


The Scheduler view chart displays the following:

- **Row Label Radio Button:** Allows Users to toggle the dimensions of the row labels between User and Caregiver. If **User** is selected as the row label, the system will display the name of the scheduled Caregiver in the Name column; if **Recipient** is selected, the Recipient names will be displayed as the row labels.
- **Find:** This is a search/filter field; Users can search for and select one or more filter parameter(s). Use the **Find** field to filter the Schedule Calendar by one or more Caregiver(s) or Recipient(s).
- **Total Visits:** The total number of scheduled visits for the selected calendar period for each User or Recipient.
- **Date:** The date range for the selected planner or calendar period.
- **Time:** The time the visit will start; a colored bar indicates how long the visit is scheduled for.

6.1.2. Calendar View

Users can configure the Schedule Calendar to be displayed in Calendar View, which depicts a list chart of all scheduled visits in an agency’s Mobile Caregiver+ Provider Portal. Users can switch to Calendar View by clicking the green calendar icon in the upper left corner of the Schedule Calendar screen.



The Calendar View chart displays a list report of all scheduled visits for Users and Recipients within the selected calendar period. The Calendar view chart displays:









- The User/Recipient name and the start time are displayed for each scheduled visit that appears in the list.
- The days are displayed as column headers for the list.


You can use the **Next** and **Previous** buttons at the top of the page to change the time period. See.



6.2. General Navigation for the Schedule Calendar

Users can use the icons located in the header to configure the dimensions of the Schedule Calendar.

Icon	Description
Today 	Reset the calendar to the default view, displaying scheduled visits for the current day.
Day 	Configures the Schedule Calendar to display a daily planner, displaying scheduled visits for one day.
Week 	Configures the Schedule Calendar to display a weekly planner, displaying scheduled visits for one week.
Month 	Configures the Schedule Calendar to display a monthly planner, displaying scheduled visits for one month.
Next 	Allows Users to scroll to the next months, weeks, or days, depending on the selected planner.
Previous 	Allows Users to scroll to the previous months, weeks, or days depending on the selected planner.
Reload 	Reloads or refreshes the page with the most recent schedule data.
Add New Visit 	Allows Users to schedule and add new visits to the agency's Mobile Caregiver+ Provider Portal.

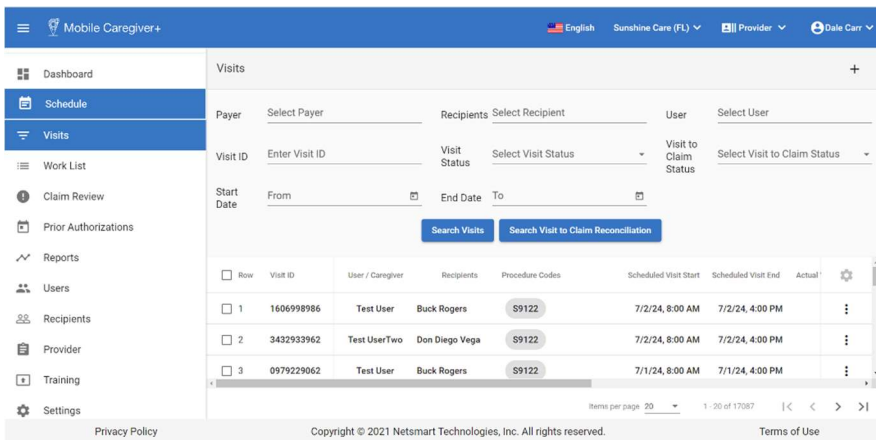
Note: Users can add a visit directly from the Schedule page by clicking the “add visit” icon, , in the upper right corner of the screen.

6.3. Adding/Scheduling Visits

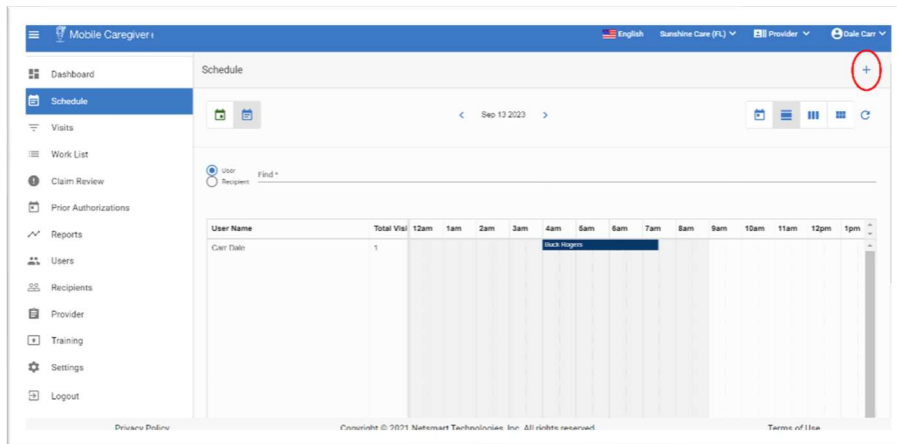
From the Schedule Calendar, Users can add or schedule a visit using the **Add New Visit** command, **+**. The system will display the Add New Visit form. The Add New Visit form is composed of six sections. Users can use the Add New Visit form to schedule non-recurring (single, one-time) or recurring visits.

To schedule new visits:

1. From the Main Menu, click **Schedule** or **Visits**.



2. Click the “Add New Visit” icon, **+**, (the plus sign), located in the top-right corner of the screen.

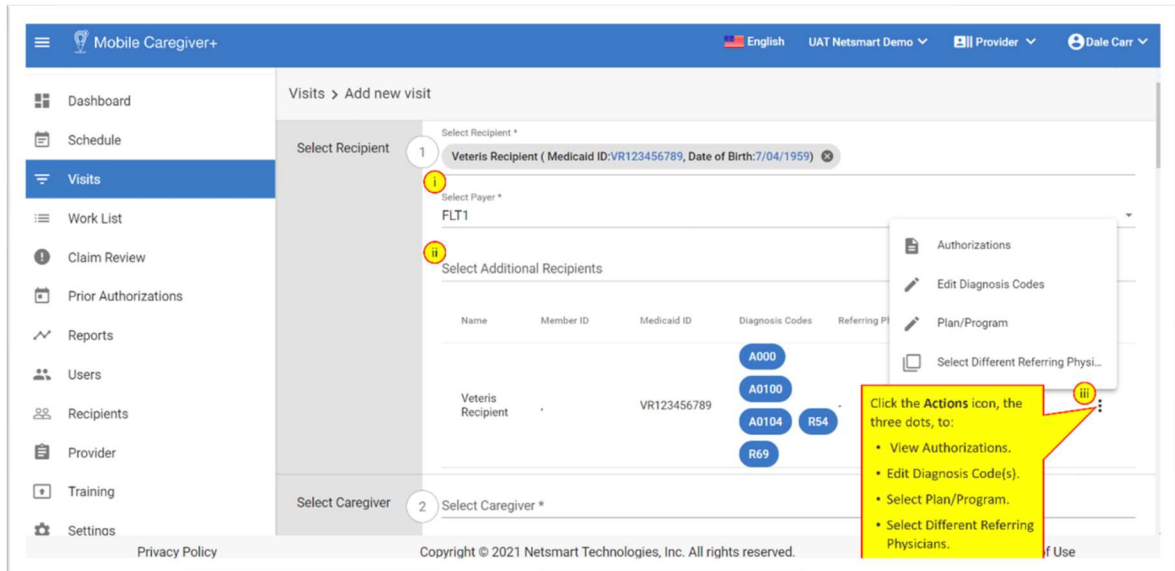


3. From the Add New Visit form, follow the directions below to configure the visit options for adding a new visit.



6.3.1. Section 1 - Select Recipient(s) Options

Note: Please be sure to adhere to the Payer's policies and procedures when scheduling visits.



4. From Section 1, make the following entries and selections:

- i. **Select Payer:** This field is automatically populated with the default Payer that has been configured for the selected Recipient. For Recipient that are enrolled in multiple Payers Plans/Programs, click in the **Select Payer** field to select a different Payer Plan/Program.
- ii. **Select Additional Recipients:** Click in the **Select Additional Recipients** field and use the drop-down list to select additional Recipient to be scheduled to receive service(s).

Note: The system will automatically fill in the Diagnosis Code(s) and/or Referring Physician listed in the Recipient's Mobile Caregiver+ profile.

Note: The system will retain the billing sequence of Recipients' Diagnosis Codes as displayed in the Recipient's Mobile Caregiver+ profile; the Diagnosis Codes will be populated into rendered service records in the same order as they appear in the Recipient's Mobile Caregiver+ profile.

Not all agencies are authorized to provide services to groups; this option is determined by the Payer and Program the Recipient is enrolled in.



iii. Click the Actions icon, ⋮, located to the right of the Diagnosis Code to select one of the following options:

- **Authorizations:** Displays a list of all authorizations that are currently loaded in the Mobile Caregiver+ System for the selected Recipient.

Full Name	Service	From Date	To Date	Authorization Number
Buck Rogers	S9122	4/30/21	7/3/24	BR12345678
Buck Rogers	T1019	4/30/21	7/4/24	BRT1019012345

[OK](#)

- **Edit Diagnosis Codes:** Allows Users to add/update the Diagnosis Codes for the selected Recipient.

Edit Diagnosis Codes for **Buck Rogers**

Enter Diagnosis Code

A009 ✕ R54 ✕ R69 ✕

(A00) CODE: A00

(A000) Cholera due to Vibrio cholerae 01, biovar cholerae

(A001) Cholera due to Vibrio cholerae 01, biovar eltor

(A0102) Typhoid fever with heart involvement

(A0103) Typhoid pneumonia

(A0104) Typhoid arthritis

Note: It is dependent on the Payer and Program, whether Providers are able to edit Recipients' Diagnosis Codes. All edits made to a Recipient's Diagnosis Code will be permanently saved to the Recipient's EVV file, even if the User does not complete scheduling the visit.

****The system will retain the billing sequence of Recipients' Diagnosis Codes as displayed in the Recipient's Mobile Caregiver+ profile; the Diagnosis Codes will be populated into rendered service records in the same order as they*

appear in the Recipient's Mobile Caregiver+ profile, Diagnosis Code
R69 ✕ R54 ✕ A009 ✕ .***

- **Select a Plan/Program:** For Recipients that are enrolled in multiple Plans/Programs with a single Payer, Users can click on the shortcut labeled Plan/Program, then click in the Select Plan/Program field to view and select a different Plan/Program that the Recipient is enrolled in with the selected Payer.

Plan/Program **Buck Rogers**

Select Plan / Program *

FLORIDA STATE MEDICAL PLAN | NONE

SAVE **CANCEL**

- **Select Different Referring Physician:** Allows Users to change default Referring Physicians.

Add Referring Physician for **Buck Rogers**

Charle Darwin (ID:333777777) ✕

Charle Darwin (ID:333777777)

Maria gomezperez (ID:123456789)

Note: It is dependent on the Payer and Program, whether a Recipient requires a Referring Physician for a service.

6.3.2. Section 2 - Select Caregiver



Select Caregiver **2**

Select Caregiver *

PRODTESTGEORGIE PRODTESTPINK

Madison Durand

Gregoria Pinkley

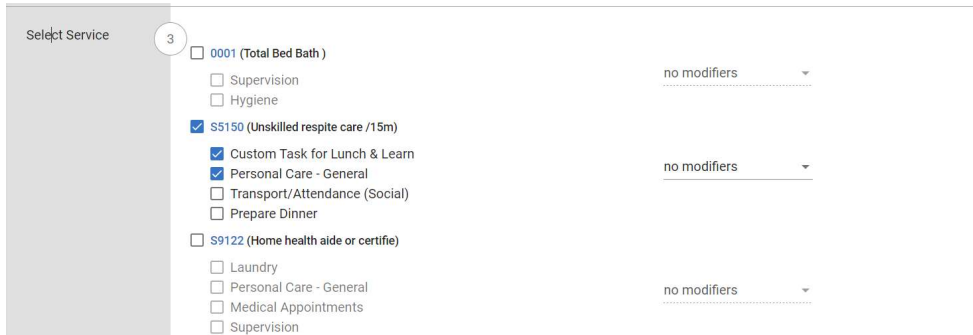
robert moser

peter simmon

Select Services **3**

5. From Section 2, click in the **Select Caregiver** field and use the drop-down list to select the Caregiver who will perform the visit to complete the assigned service(s) and task(s).

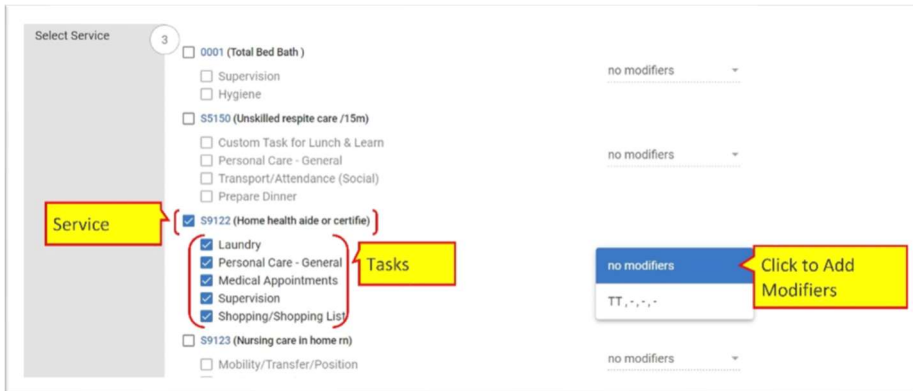
6.3.3. Section 3 - Select Services



Note: The system will display a list of all billable Service Codes for the Payer.

6. From Section 3, select the Services (HCPCS, Procedure Codes/Mods) and Tasks being assigned.

Note: Depending on the Payer and Program, some Providers may be allowed to schedule multiple services in a single visit. Payers can also set prerequisite license/certification requirements for Caregivers being scheduled to complete services.

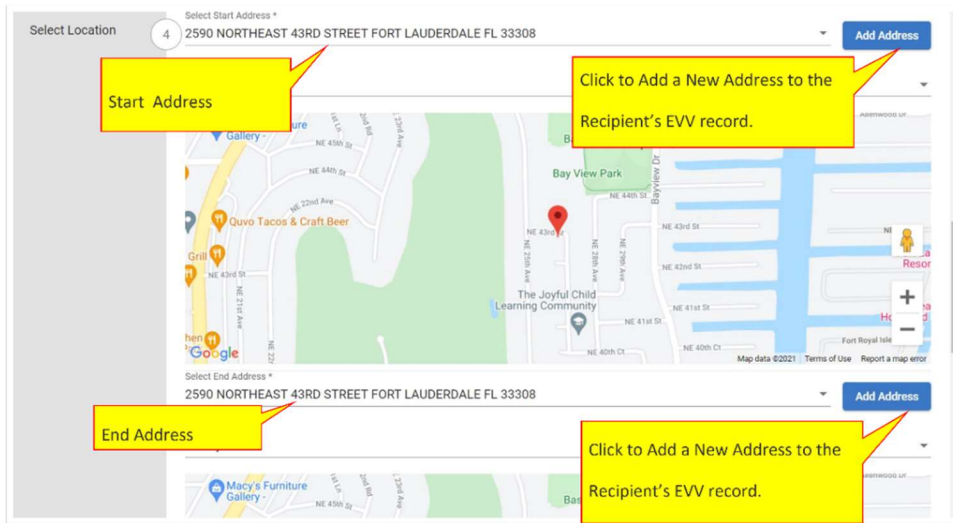


- i Select the service(s) that are being assigned by placing a checkmark in the checkbox(es) next to the respective Service Code(s). The system will automatically select all Tasks by placing checkmarks in the checkboxes for all listed Tasks.
- ii Deselect any Task(s) that are not being assigned by clearing the checkmarks for the respective Tasks.
- iii Click in the **Modifiers** field to select any modifiers that are listed in the Prior Authorization.


6.3.4. Section 4 - Select Visit Locations

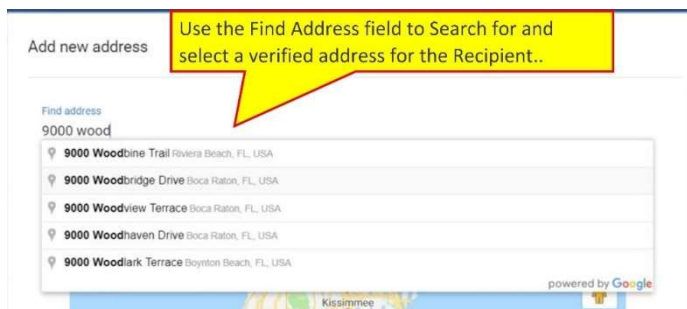
The 21st Century Cures Act requires that EVV visit data include the locations where Caregivers will start rendering billable services and the locations where billable services end; by default, the Mobile Caregiver+ System will automatically load the Recipient’s designated primary address as the Start Address and End Address for billable services. If the default address is the correct location where the visit will start and end, no further actions are required. Users can replace either the Start Address, End Address, or both.

Users can add new addresses to the Recipient’s EVV record and/or select a stored address to be used as the Start Address and/or End Address for billable services.

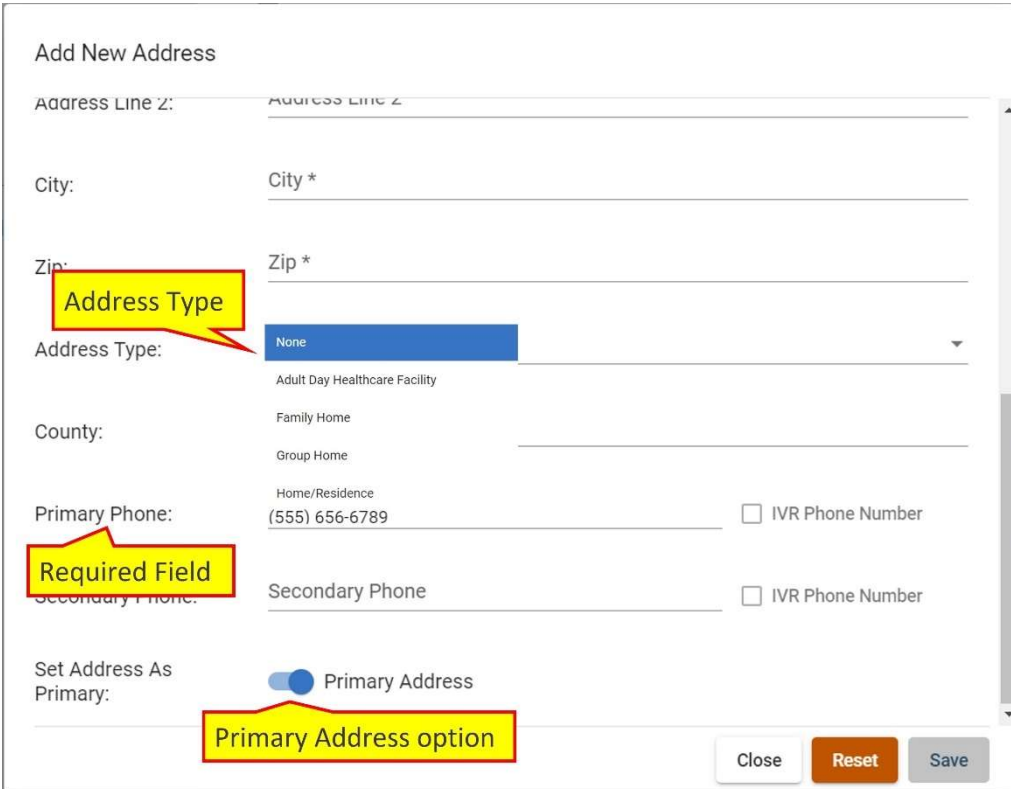


7. From section 4, select the **Start Address** and the **Select End Address**.

- i To add a new address for the Recipient, click on the **Add Address** command, .
- ii **Find Address:** Start typing the new address in the Find Address field; the system will display a list of verified addresses that match the data being entered.



- iii From the list, select the correct address to be added to the Recipient’s EVV record.
- iv **Address Type:** Click in the **Address Type** field to select the type (descriptive designation) for the service address.
- v **Primary Phone:** Enter the Recipient’s phone number (You are required to enter a phone number for the Recipient’s address).
- vi **Set Address As Primary:** Place a checkmark in the checkbox to designate the new address as the Recipient’s Primary Address.



Add New Address

Address Line 2:

City:

Zip:

Address Type: None (dropdown menu)

County:

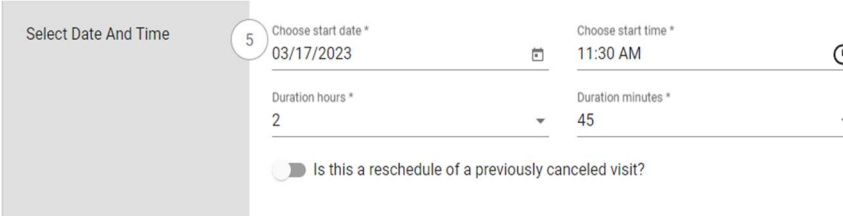
Primary Phone: IVR Phone Number

Secondary Phone: IVR Phone Number

Set Address As Primary: Primary Address

Buttons: Close, Reset, Save

6.3.5. Section 5 - Select Date and Time



Select Date And Time

5 Choose start date *

Choose start time *



Duration hours *

Duration minutes *


Is this a reschedule of a previously canceled visit?


8. In Section 5, configure the following parameters:



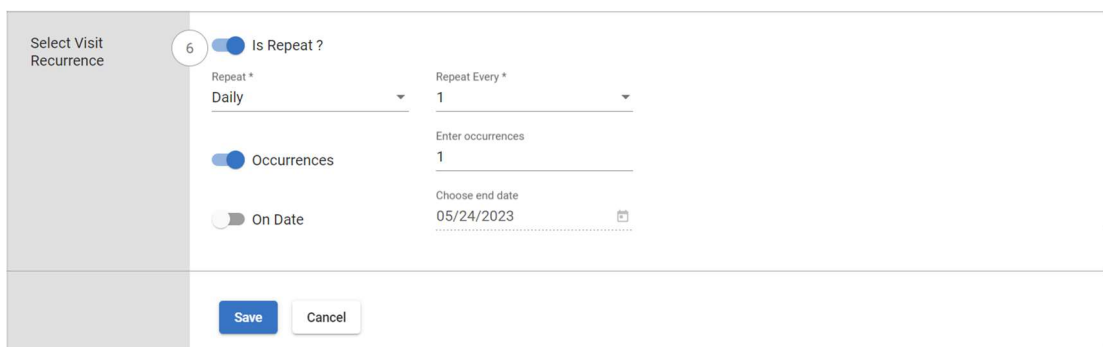
- i **Choose Start Date:** Manually type in or click on the calendar icon, , to enter the date the visit will occur.
- ii **Choose Start Time:** Click on the clock icon, , to enter the start time for the visit. The time is limited to five (5)-minute increments.

Note: To calculate the end date and time for the visit, Users will enter the total amount of time the Caregiver will need to complete all assigned service(s) or tasks.

- iii **Duration hours:** Enter the total number of hours in the time needed to complete all assigned service(s). For example, if the total time needed to complete all assigned services is 7 hours and 30 minutes, the User will enter “7” in the **Duration hours** field.
- iv **Duration minutes:** Enter the total number of minutes needed to complete all assigned service(s). For example, if the total time the need to complete all assigned services is 7 hours and 30 minutes, the User will enter “30” in the **Duration minutes** field.
- v **Rescheduled visit:** If the visit being created was previously canceled and is being rescheduled, activate the reschedule switch, . The switch will slide to the right and will change from white to blue when activated.

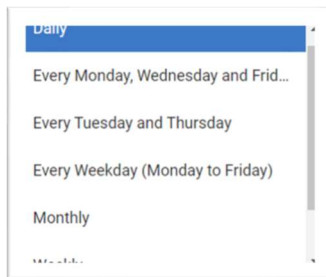
Note: If the visit is saved with the switch turned on, the visit will be saved and marked as a ‘rescheduled’ visit. The rescheduled visit will display in the Visits screen with the ‘rescheduled’ icon, .

6.3.6. Section 6 - Select Visit Recurrence



9. In Section 6, configure the recurring and expiration settings for the visit: To schedule a visit as a recurring/repeating visit, the visit data being entered in sections 1 through 5 of the Add New Visit form must be identical, such as:

- Recurring visits must start and end at the same location(s).
 - Recurring visits must start and end at the same time.
 - Recurring visits must be for the same Caregiver and Recipient(s).
 - Recurring visits must be for the same services.
 - Recurring visits must include the same Tasks.
- i **Is Repeat?:** Activate the recurrence/repeat option by clicking on the “**Is Repeat?**”, , switch. The Is Repeat? switch will slide to the right and change from white to blue when activated.
- ii **Repeat:** Use the Repeat field to configure/set the repeat patterns for recurring visits.



- **Daily:** Select the Daily option to schedule a recurring visit for all seven days of each week.

User Name	Total Visits	1 W	2 T	3 F	4 S	5 S	6 M	7 T	8 W	9 T	10 F	11 S	12 S	13 M	14 T	15 W	16 T	17 F	18 S	19 S	20 M	21 T	22 W	23 T	24 F	25 S	26 S
Carr Dale	30	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00	8a 8:00

- **Every Monday, Wednesday, and Friday:** Select the Monday, Wednesday, and Friday option to schedule three (3) visits per week on the respective days.

User Name	Total Visits	1 W	2 T	3 F	4 S	5 S	6 M	7 T	8 W	9 T	10 F	11 S	12 S	13 M	14 T	15 W	16 T	17 F	18 S	19 S	20 M	21 T	22 W	23 T	24 F	25 S	26 S
Carr Dale	13	8a 8:00		8a 8:00			8a 8:00		8a 8:00	8a 8:00				8a 8:00				8a 8:00				8a 8:00					

- **Every Tuesday and Thursday:** Select the preconfigured Tuesday and Thursday option to schedule two (2) visits per week on the respective days.

User Name	Total Visits	1 W	2 T	3 F	4 S	5 S	6 M	7 T	8 W	9 T	10 F	11 S	12 S	13 M	14 T	15 W	16 T	17 F	18 S	19 S	20 M	21 T	22 W	23 T	24 F	25 S	26 S
Carr Dale	9		8a 8:00					8a 8:00		8a 8:00					8a 8:00		8a 8:00					8a 8:00		8a 8:00			

- **Every Weekday (Monday to Friday):** Select the preconfigured Every Weekday option to schedule weekly recurring visits for the workdays,



Mondays through Fridays, on a weekly basis.

User Name	Total Visits	1 W	2 T	3 F	4 S	5 S	6 M	7 T	8 W	9 T	10 F	11 S	12 S	13 M	14 T	15 W	16 T	17 F	18 S	19 S	20 M	21 T	22 W	23 T	24 F	25 S	26 S
Carr Dale	22	Da Duc	Da Duc	Da Duc			Da Duc	Da Duc	Da Duc	Da Duc	Da Duc			Da Duc	Da Duc	Da Duc	Da Duc	Da Duc			Da Duc	Da Duc	Da Duc	Da Duc	Da Duc		

- **Monthly:** Select the Monthly option when scheduling monthly recurring visits.

User Name	Total Visits	1 W	2 T	3 F	4 S	5 S	6 M	7 T	8 W	9 T	10 F	11 S	12 S	13 M	14 T	15 W	16 T	17 F	18 S	19 S	20 M	21 T	22 W	23 T	24 F	25 S	26 S
Carr Dale	1	Da Duc																									

Repeat *
Weekly

Weekdays:

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Choose at least one day of week!

- **Weekly:** Select the Weekly option to configure custom weekly recurring visits. The system will display a customizable chart, which allows Users to randomly select and configure custom combinations of days for scheduling weekly recurring visits. The Weekly recurring visit option offers the greatest flexibility for scheduling recurring visits.
 - **Yearly:** Select the Yearly option when scheduling yearly recurring visits.
- iii **Repeat Every:** The Repeat Every option is a “skip option,” which allows Users to configure the system to skip one or more of the time intervals selected for the Repeat option. Users can select a numeric value to configure the recurring visits to skip one (1) or more day(s), week(s), month(s), or year(s) based on the selected Repeat option. Please refer to the table below for additional information:

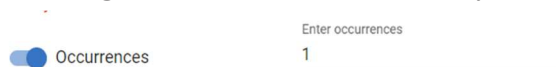
Repeat	Repeat Every	Recurring Visit Schedule
Daily	1	Every day.
Daily	2	Every other day (every second day).
Daily	3	Every third day.
Every Monday, Wednesday, Friday	1	Mondays, Wednesdays, and Fridays each week.
Every Monday, Wednesday, Friday	2	Mondays, Wednesdays, and Fridays of every other week.



Repeat	Repeat Every	Recurring Visit Schedule
Every Monday, Wednesday, Friday	3	Mondays, Wednesdays, and Fridays of every third week.
Every Tuesday and Thursday	1	Tuesdays and Thursdays each week.
Every Tuesday and Thursday	2	Tuesdays and Thursdays of every other week.
Every Tuesday and Thursday	3	Tuesdays and Thursdays of every third week.
Monthly	1	Every Month.
Monthly	2	Every other month (Every Second month).
Monthly	3	Every third month (Quarterly).
Yearly	1	Every year.
Yearly	2	Every other year.
Yearly	3	Every third year.

iv Configure the recurring visit’s expiration option. The User can select one of two expiration options for the recurring visit:

- **Occurrences:** Click on the Occurrences switch to activate the expiration option; the Occurrence option allows Users to enter the total number of recurring visits (occurrences) to add to the EVV System.
- **Enter Occurrence:** Enter the numeric value for the total number of recurring visits to add to the EVV System in the Enter Occurrence field.



Or

- **On Date:** Click on the On Date switch to activate the expiration option; the On Date option allows Users to schedule recurring visits up to a set date. Recurring visits can be scheduled up to 1 year (52 weeks) from the Start Date entered in Section 5.
- **Choose end Date:** Either manually type or click on the calendar icon and enter the end date.

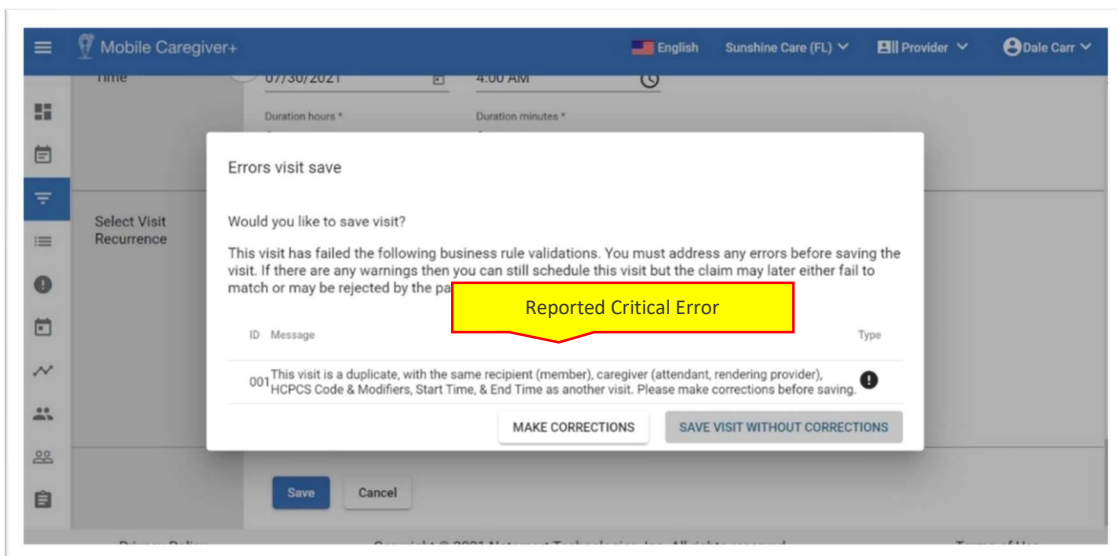
On Date
 Choose end date
05/24/2023
📅

Note: Users can either choose the Occurrences or On Date expiration option; Users cannot choose both.

- v Click the blue **Save**, Save, command, located at the bottom of the Add New Visit form to save the scheduled visit.

Note: The system will use the designated Payer’s business rule to screen the scheduling entries to ensure that the visit adheres to the Payer’s policies and procedures. The system will return one of three outcomes:

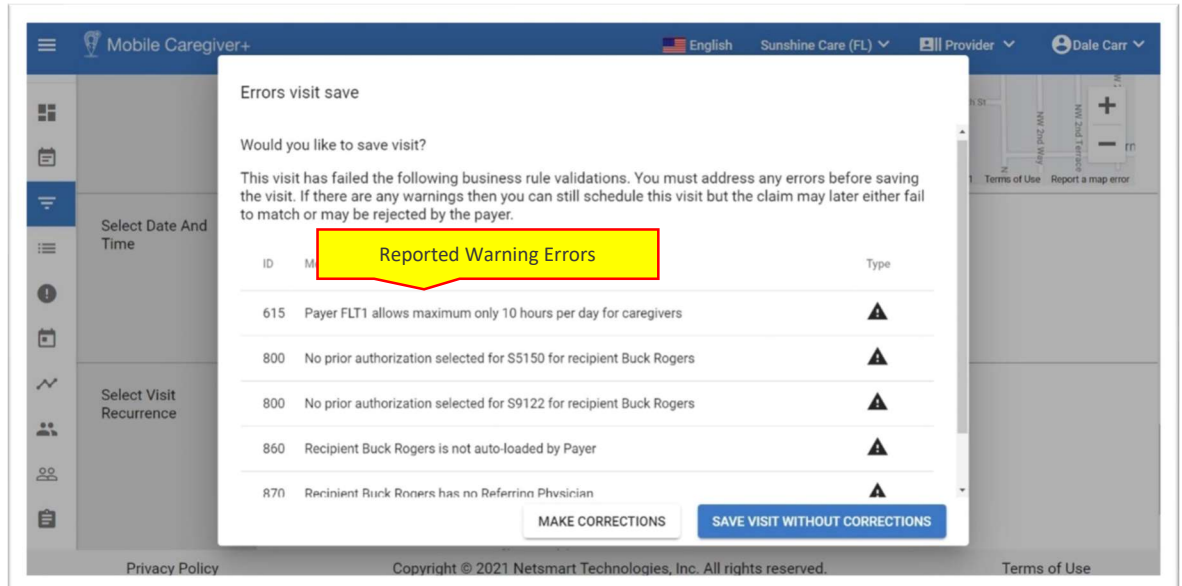
- **No Error:** The visit being scheduled has no reported error; the system will automatically save the visit.
- **Critical Error:** A Critical Error indicates that the visit being scheduled has at least one major fault and cannot be saved – Users will only be given the option to MAKE CORRECTIONS for the displayed error(s)/fault(s).



*Note: Users must click the **MAKE CORRECTION** command and fix any reported critical(s) error before a visit can be saved.*

*Warning Error: A Warning Error indicates that the visit being scheduled violates at least one of the Payer’s rules, but User can select **SAVE VISIT WITHOUT CORRECTIONS**. Users will only be given the option to **SAVE VISIT WITHOUT CORRECTIONS** for the displayed error(s)/fault(s).*






*Note: Users have the option to choose to click the **MAKE CORRECTION** command and fix any reported warning error(s) before saving the visit or click the **SAVE VISIT WITHOUT CORRECTIONS** command to save the visit and make corrections later.*

Visits that have no reported errors/faults will automatically be added to the Provider's EVV Portal; no further actions are required from the User.



7. Visits List

- Managing the Visits List
- Changing the Number of Visits Displayed Per Page
- Filtering the Visits List
- Viewing Visit Details
- Manually Completing a Visit
- Entering Required Note
- Entering the Visit's Start/End Date and Start/End Time
- Entering Service Start/End Date and Start/End Time
- Configuring Assigned Tasks
- Canceling Missed and Not Started, Late Visits
- Editing/Rescheduling Visits
- Section 1 – Select Recipient(s)
- Section 2 – Select Caregiver
- Section 3 – Select Service
- Section 4 – Select Location
- Section 5 – Select Date and Time
- Section 6 – Select Visit Recurrence
- Deleting a Visit

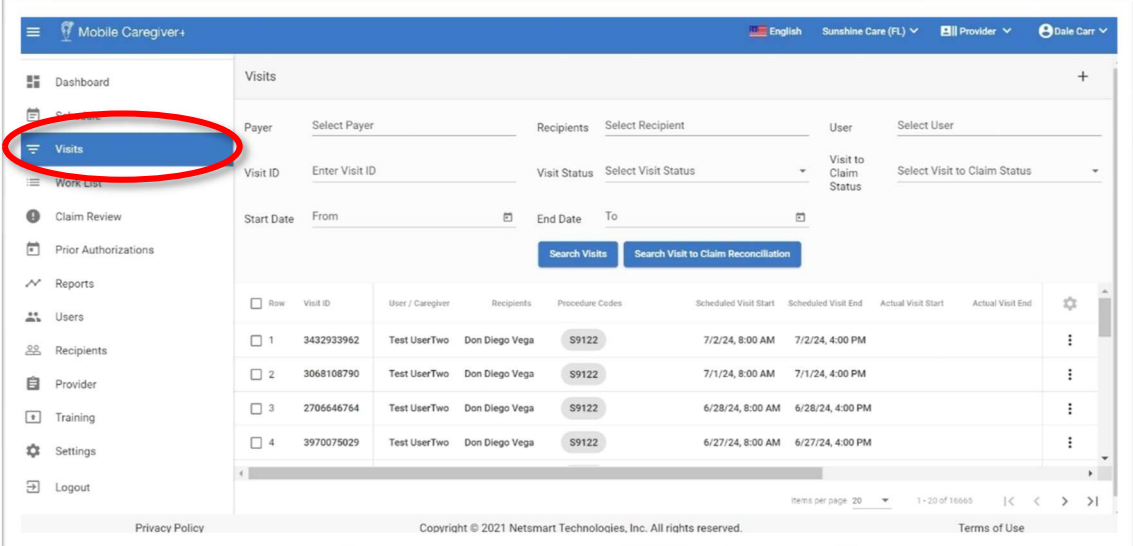
The Visits List displays a list chart, which depicts all scheduled visits in a Provider's Mobile Caregiver+ Provider Portal. The Visits menu option allows Providers to search for, view, and manage scheduled visits. Providers can add new visits to their EVV Portals by clicking on the Add New Visit command, , located in the top-right corner of the screen. See [Adding/Scheduling Visits](#) for more information.



7.1. Managing the Visits List

To access the Visits List:

1. From the Main Menu, click **Visits**.



The screenshot displays the 'Visits' section of the Mobile Caregiver+ provider portal. The left sidebar contains a navigation menu with 'Visits' highlighted in blue and circled in red. The main content area features a search form with fields for Payer, Recipients, User, Visit ID, Visit Status, and Visit to Claim Status. Below the search form are two buttons: 'Search Visits' and 'Search Visit to Claim Reconciliation'. A table lists scheduled visits with columns for Row, Visit ID, User / Caregiver, Recipients, Procedure Codes, Scheduled Visit Start, Scheduled Visit End, Actual Visit Start, and Actual Visit End. The table contains four rows of data.

Row	Visit ID	User / Caregiver	Recipients	Procedure Codes	Scheduled Visit Start	Scheduled Visit End	Actual Visit Start	Actual Visit End
1	343293962	Test UserTwo	Don Diego Vega	S9122	7/2/24, 8:00 AM	7/2/24, 4:00 PM		
2	3068108790	Test UserTwo	Don Diego Vega	S9122	7/1/24, 8:00 AM	7/1/24, 4:00 PM		
3	2706646764	Test UserTwo	Don Diego Vega	S9122	6/28/24, 8:00 AM	6/28/24, 4:00 PM		
4	3970075029	Test UserTwo	Don Diego Vega	S9122	6/27/24, 8:00 AM	6/27/24, 4:00 PM		

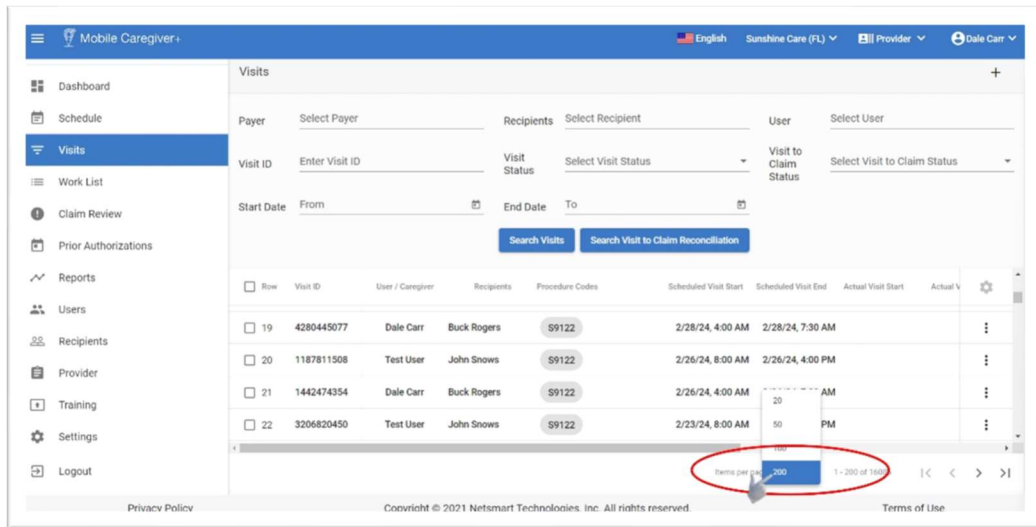
Note: The system will display a list chart depicting all scheduled visits for the active agency.

7.1.1. Changing the Number of Visits Displayed Per Page

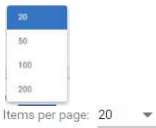



By default, the Visits List will display twenty records at a time on the screen.


To change the number of visits or records that are displayed on each page:

- i Scroll to the bottom of the Visits List.
- ii Click the Items per page drop-down list arrow and select the number of records to be displayed per screen.



Note: If there are multiple pages, use the navigation arrows (icons) to scroll through the pages.

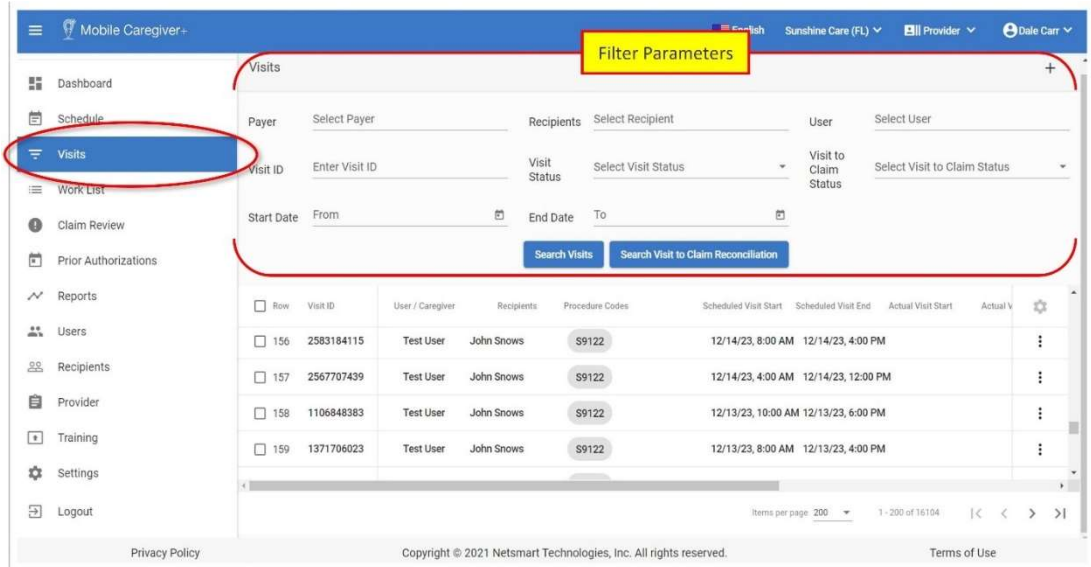
Icon	Description
	Used to set the number of records (visits) to display on the page (screen). Users may have to scroll down to see all visits.
	Navigate to the first page of visits.
	Navigates back to the previous page of visits.
	Navigates forward to the next page of visits.

Icon	Description
	Navigates to the last page of visits.

7.1.2. Filtering the Visits List

To filter the Visits List:


- i. From the Main Menu, click **Visits**.



Note: Users can filter the Visits List by using the fields located in the header. Users can filter the Visits List by entering/selecting one or more search parameters in one or more of the following fields:

Field Name	Filter Description
Payer	Display a list of all Payers that are configured for the active agency. Users can select a Payer to filter the Visits List to only display visits that are scheduled for Recipients insured by the selected Payer.
Recipient	The Recipient field has a list of all active Recipients that are enrolled with the active agency. Users can filter the Visits List by selecting one or more Recipients. The system will only display visits for the selected Recipient(s).
User	The User field will display a list of all Users that are linked to the active agency. Users can select a User (Caregiver) to filter the Visits List to only display only visits that are scheduled for the selected User.

Field Name	Filter Description
Visit ID	The Visit ID field allows Users to search for a specific visit. Users can enter a Visit ID to filter the Visits List to display a specific visit.
Visit Status	The Visit Status field displays a list of visit statuses for scheduled visits, i.e., IN PROGRESS, UNABLE TO COMPLETE, MISSED, NOT STARTED, NOT STARTED, LATE, IN PROGRESS, LATE, COMPLETED and COMPLETED, LATE . Users can select a visit status to filter the Visits List to only display visits whose statuses match the selected status.
Visits to Claim Status	The Visit to Claim Status field displays one of two processing statuses for completed visits, i.e., SUCCESS or ERROR . Users can select one of the two Visit to Claim Statuses to filter the Visits List to only display visits that match the selected status.
Start Date	Users can filter the Visits List to only display visits that are scheduled for a specific date rate. Users must enter the Start Date in combination with an End Date to filter the Visits List by the specified date range.
End Date	Users can filter the Visits List to only display visits that are scheduled for a specific date rate. Users must enter the End Date in combination with a Start Date to filter the Visits List by the specified range.
Search Visits	Users must click the blue Search Visits command to see the list of visits that match the search parameters – Users must click the blue Search Visit command to update the list after making any changes to the search parameters.
Search Visit to Claims Reconciliation	The Search Visit to Claim Reconciliation function is a tool which can be used to view current claim status information for completed visits – The Visit to Claims Reconciliation can be used to view the status of billable services in the Work List and in Claims Review. Users must select a Payer to use the Visit to Claims Reconciliation function.


- ii. Click the blue **Search Visits** command after selecting all filter parameters.
- iii. Click on the Actions icon, , for any visit to view a shortcut submenu with a list of management options.

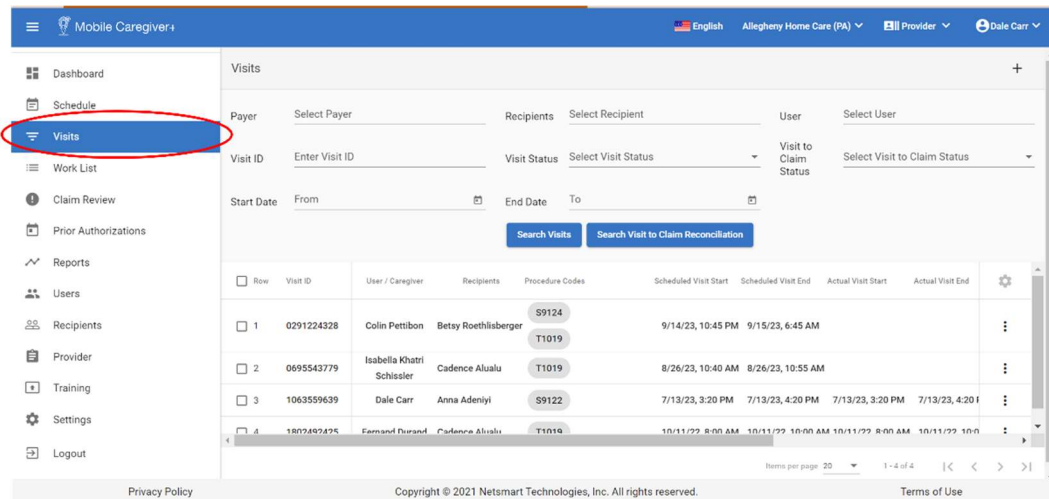
7.1.3. Viewing Visit Details

The Visit Detail screen displays scheduling, status, and service data for scheduled visits. The Visit Details screen displays management options for all visits in the lower-right corner of the form. Users can use the Visit Details screen to view the following:

- Details, i.e., Recipient, Caregiver, Scheduled Start/End Time, Services, etc. for scheduled visits.
- Status information, i.e., Completed, Unable To Complete, In Progress, etc., for scheduled visits.
- Actual reported data for visits that are currently happening or visit that have been completed.

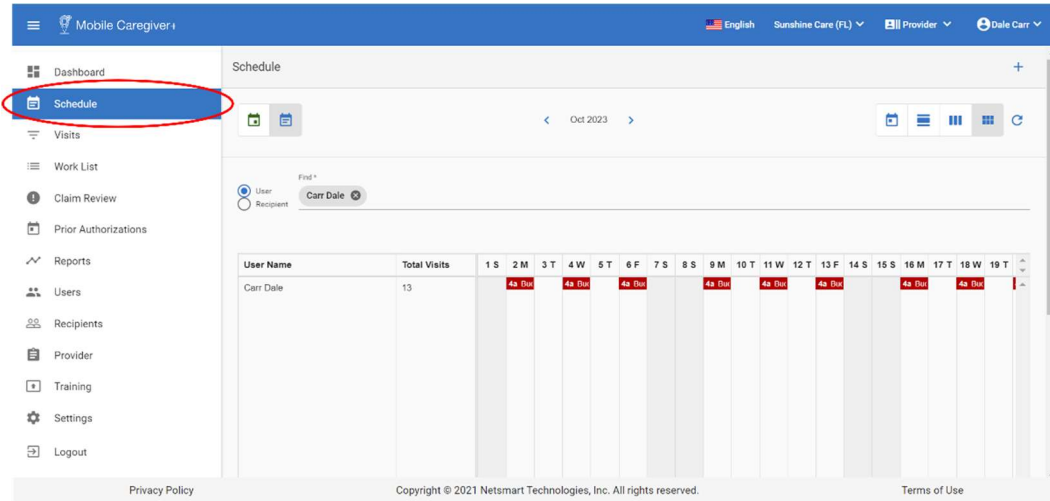
There are two ways to access the Visit Status Detail screen:

- From the Main Menu, click **Visits**.
- Locate and click on the Actions icon, , for the visit.
- From the shortcut submenu, click **View Details** to display the Visit Status Detail screen for the respective visit.



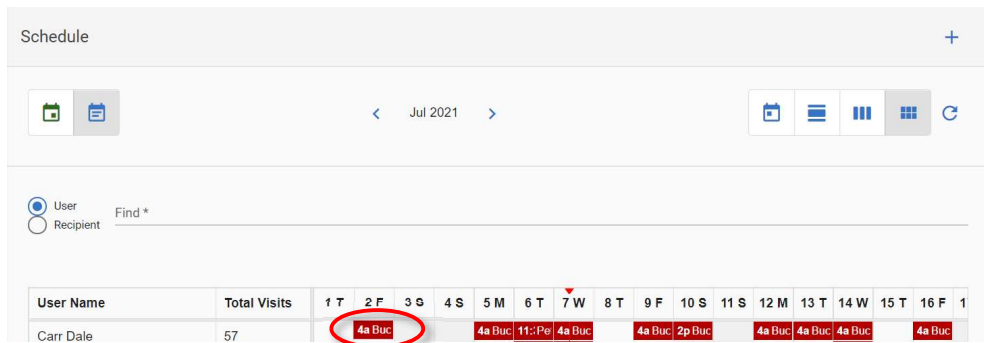
Or

- From the Main Menu, click **Schedule**.



User Name	Total Visits	1 S	2 M	3 T	4 W	5 T	6 F	7 S	8 S	9 M	10 T	11 W	12 T	13 F	14 S	15 S	16 M	17 T	18 W	19 T
Carr Dale	13		4a Buc		4a Buc		4a Buc			4a Buc		4a Buc		4a Buc			4a Buc		4a Buc	

ii Locate and click on the bar chart icon, **4a Buc**, that represents the visit.



User Name	Total Visits	1 T	2 F	3 G	4 S	5 M	6 T	7 W	8 T	9 F	10 S	11 S	12 M	13 T	14 W	15 T	16 F	17 S
Carr Dale	57		4a Buc			4a Buc	11:30p	4a Buc		4a Buc	2p Buc		4a Buc	4a Buc	4a Buc		4a Buc	

Note: The system will display the Visit Status Detail screen for the respective visit.



Visit ✕

Status: Missed Visit Status: -
 Caregiver: Test User Detail: -
 Recipients: Buck Rogers Notes: -

Claims: (1 item(s)) ^

Claim Status	Invoice ID #	Recipient
-		Buck Rogers

Completed Tasks: (1 item(s)) ^

HCPCS Code/Mods	HCPCS Description	Tasks Description
S9122 -	Home health aide or certifie	Medical Appointments Supervision Shopping/Shopping List Laundry Personal Care - General

Addresses:

Scheduled Visit Start: Aug 1, 2023, 6:00:00 PM Scheduled Visit End: Aug 1, 2023, 9:00:00 PM

Cancel
Complete
Print


Note: The system will display the available User options in the lower right corner of the Visit Status Detail screen. Depending on the status of the visit, Users will have one or more of the following options (please review the [Visit Status](#) Report for descriptions of Mobile Caregiver+ visit statuses):

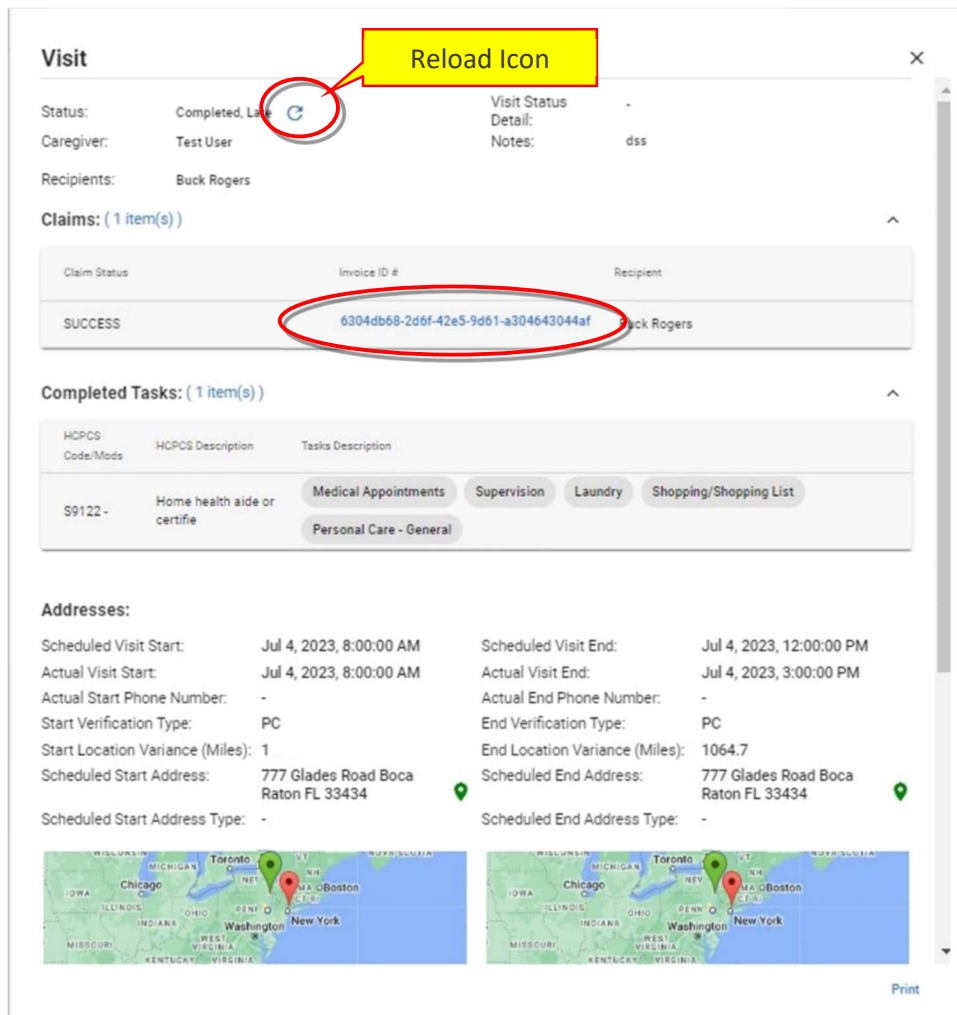
Status	User Options
In Progress	User will can manually complete visits that have an In Progress status.
Unable To Complete	Users will not be able to modify any visits that have an Unable To Complete status.
Missed	Users will have access to Cancel visit or Complete options for any visits that have a Missed status.
Not Started	Users will only have access to the Edit Visit or Delete visit options for any visits that have a Not Started status.
Not Started, Late	Users have the option to, Edit, Cancel or Complete any visit that has a Not Started, Late status.
In Progress, Late	Users will only be given the Complete option for any visits that have an In Progress, Late status.




Status	User Options
Completed	Users will not be able to modify any visits that have a Completed status.
Completed, Late	Users will not be able to modify any visits that have a Completed Late status.

Note: The system will display the Print option for all visits in the Visit Status Detail screen, regardless of the visit status.

All visits that have a “Completed” or “Completed, Late,” status will display a “Reload” icon, . Users can click on the Reload icon to reprocess billable services that were completed during visits. Billable services must be successfully processed before being transferred to the Work List.



Visit

Status: Completed, Late  Visit Status Detail: -

Caregiver: Test User Notes: dss

Recipients: Buck Rogers

Claims: (1 item(s))

Claim Status	Invoice ID #	Recipient
SUCCESS	6304db68-2d6f-42e5-9d61-a304643044af	Buck Rogers

Completed Tasks: (1 item(s))

HCPCS Code/Mods	HCPCS Description	Tasks Description
S9122 -	Home health aide or certify	Medical Appointments Supervision Laundry Shopping/Shopping List Personal Care - General

Addresses:

Scheduled Visit Start:	Jul 4, 2023, 8:00:00 AM	Scheduled Visit End:	Jul 4, 2023, 12:00:00 PM
Actual Visit Start:	Jul 4, 2023, 8:00:00 AM	Actual Visit End:	Jul 4, 2023, 3:00:00 PM
Actual Start Phone Number:	-	Actual End Phone Number:	-
Start Verification Type:	PC	End Verification Type:	PC
Start Location Variance (Miles):	1	End Location Variance (Miles):	1064.7
Scheduled Start Address:	777 Glades Road Boca Raton FL 33434	Scheduled End Address:	777 Glades Road Boca Raton FL 33434
Scheduled Start Address Type:	-	Scheduled End Address Type:	-

Print




7.2. Manually Completing a Visit

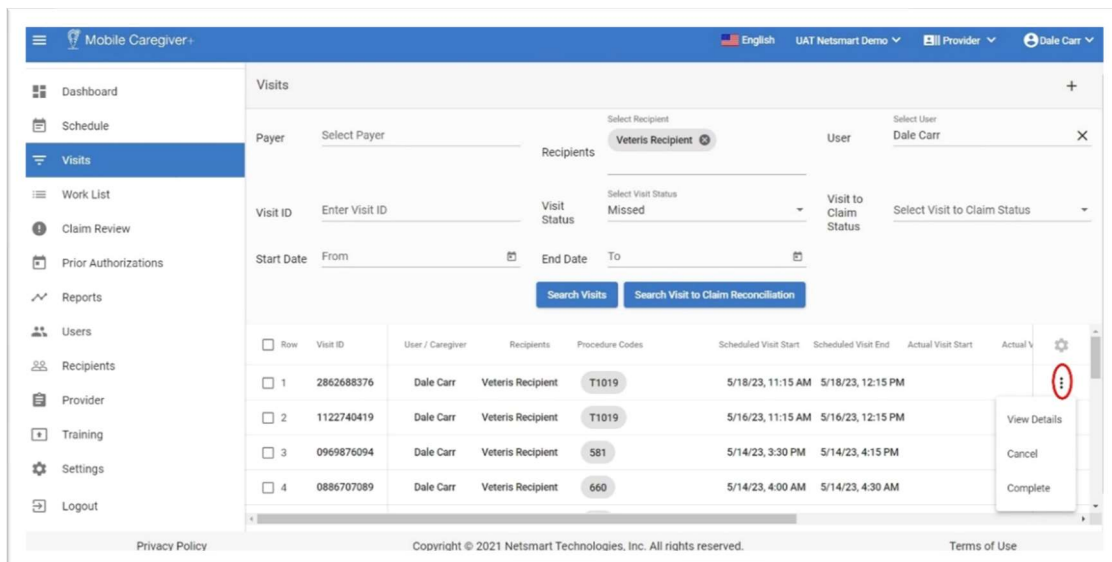
If a Caregiver completes a scheduled visit without using the Mobile Caregiver+ Mobile Application, the visit will be labeled as a Missed visit. Provider Admins can manually complete Missed visits using the Mobile Caregiver+ Provider Portal.

Provider Admins can manually complete scheduled visits with the following statuses: Missed; In Progress; In Progress, Late; and Not Started, Late.

The statuses for manually completed visits will be updated to Completed or Completed, late.

To manually complete a visit using the Provider Portal:

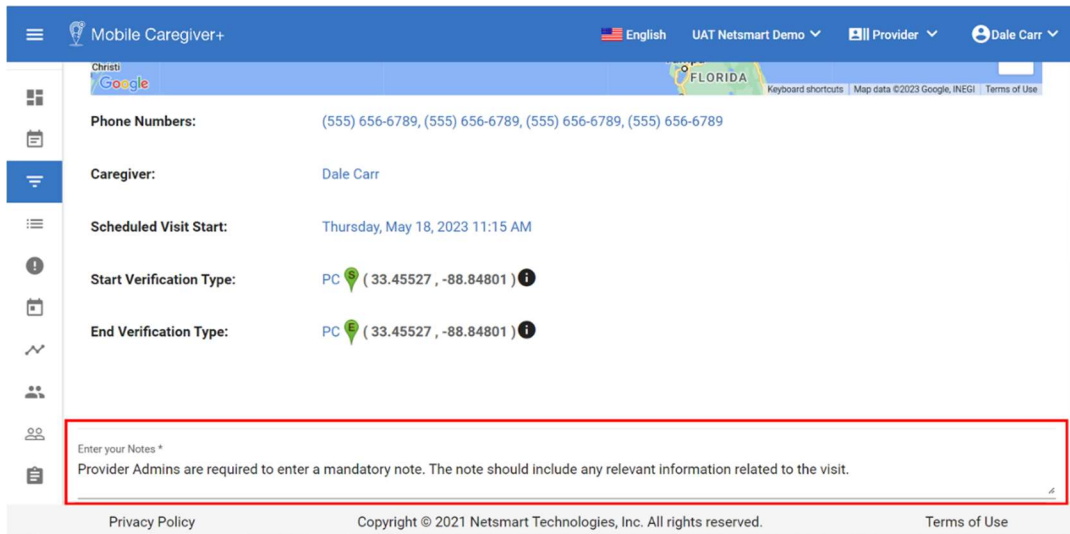
1. From the Main Menu, click **Visits**.
2. Locate the record for the visit that you want to complete.
3. Click on the Actions icon, , located on the right-side record of the record.
4. From the shortcut submenu, click **Complete**.



5. Scroll down to the center of the Complete Visit form, just below the map.
6. Configure the values for the following fields:

7.2.1. Entering Required Note

Provider Admins are required to enter a mandatory note. The note should include any relevant information related to the visit i.e., the reason the visit is being manually completed and any other important information about the visit.



The screenshot shows the Mobile Caregiver+ interface with the following details:

- Header: Mobile Caregiver+, English, UAT Netsmart Demo, Provider, Dale Carr
- Phone Numbers: (555) 656-6789, (555) 656-6789, (555) 656-6789, (555) 656-6789
- Caregiver: Dale Carr
- Scheduled Visit Start: Thursday, May 18, 2023 11:15 AM
- Start Verification Type: PC (33.45527, -88.84801)
- End Verification Type: PC (33.45527, -88.84801)
- Notes field: Enter your Notes *
Provider Admins are required to enter a mandatory note. The note should include any relevant information related to the visit.

- i. Enter the required note:

7.2.2. Entering the Visit's Start/End Date and Start/End Time

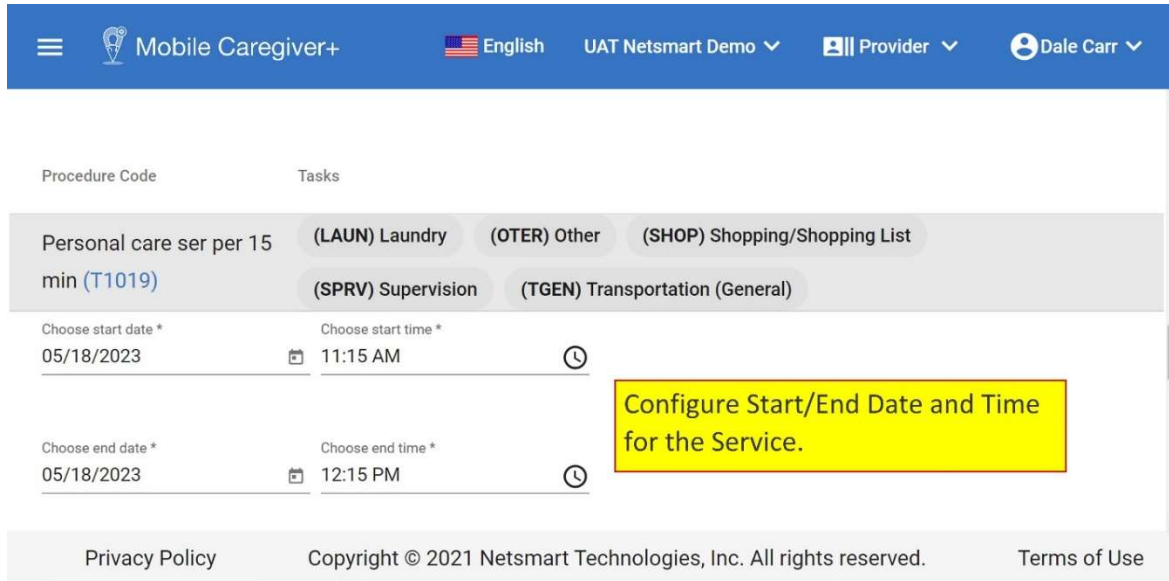
The system will display the date/time that the visit was scheduled to occur. If the visit did not occur on the scheduled start or end date, manually type in, or click on the calendar icon and enter the actual date the visit started or ended.

- i. **Choose Start/End Date:** The system will display the date that the visit was scheduled to start as the default start and end date for the visit. If the visit did not occur on the scheduled date, enter the actual date the visit started/ended.
- ii. **Choose Start/End Time:** The system will display the time that the visit was scheduled to occur. If the visit was not started at the scheduled time, click on the clock icon, and enter the actual time the visit started/ended.

7.2.3. Entering Service Start/End Date and Start/End Time

The Start/End Date and Start/End Time will be used to calculate the estimated number of units and the estimated payment amounts for "time-based services" (services that are billed based on the amount of time that Caregivers perform services).

The system will display the date/time that the visit was scheduled to occur. If the service was not started on the scheduled date, enter the actual date/time the visit started/ended.



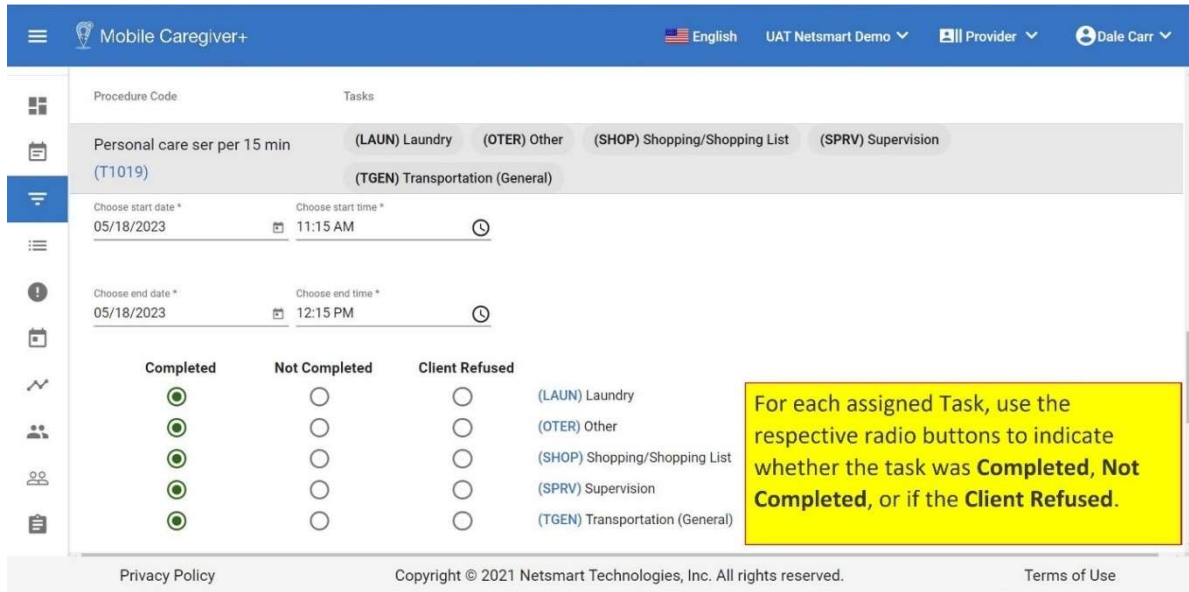
The screenshot shows the Mobile Caregiver+ interface. At the top, there is a blue navigation bar with a menu icon, the logo, and user information: 'English', 'UAT Netsmart Demo', 'Provider', and 'Dale Carr'. Below the navigation bar, the main content area is divided into sections. The first section is 'Procedure Code' with the value 'Personal care ser per 15 min (T1019)'. The second section is 'Tasks', which includes several radio button options: '(LAUN) Laundry', '(OTER) Other', '(SHOP) Shopping/Shopping List', '(SPRV) Supervision', and '(TGEN) Transportation (General)'. The third section contains four input fields for scheduling: 'Choose start date *' (05/18/2023), 'Choose start time *' (11:15 AM), 'Choose end date *' (05/18/2023), and 'Choose end time *' (12:15 PM). A yellow callout box with a black border points to these fields, containing the text: 'Configure Start/End Date and Time for the Service.' At the bottom of the page, there is a footer with 'Privacy Policy', 'Copyright © 2021 Netsmart Technologies, Inc. All rights reserved.', and 'Terms of Use'.

Note: The Start/End Date and Start/End Time configured for the service(s) will be used to calculate the number of billable units:

- i. **Choose Start/End Date:** The system will display the date that the service was scheduled to occur as the default start and end date for the service. If the service did not occur on the scheduled start or end date, manually type in or click on the calendar icon and enter the actual date the service started/ended.
- ii. **Choose Start/End Time:** The system will display the time that the service was scheduled to occur as the default start and end times for the service. If the service did not occur at the scheduled time, click on the clock icon, and enter the actual time the service started or ended.

7.2.4. Configuring Assigned Tasks

For each assigned Task, Provider Admins are required to use the respective radio buttons to indicate whether the task was **Completed**, **Not Completed**, or if the **Client Refused**.



Procedure Code: T1019

Tasks: (LAUN) Laundry, (OTER) Other, (SHOP) Shopping/Shopping List, (SPRV) Supervision, (TGEN) Transportation (General)

Choose start date*: 05/18/2023

Choose start time*: 11:15 AM

Choose end date*: 05/18/2023

Choose end time*: 12:15 PM

Completed	Not Completed	Client Refused	Task
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	(LAUN) Laundry
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	(OTER) Other
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	(SHOP) Shopping/Shopping List
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	(SPRV) Supervision
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	(TGEN) Transportation (General)

For each assigned Task, use the respective radio buttons to indicate whether the task was **Completed**, **Not Completed**, or if the **Client Refused**.

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- i. Click on one of the three radio buttons to indicate whether each corresponding task was Completed, Not Completed, or if the Client Refused.

Note: Depending on the Payer and Program Recipients are enrolled with, you may be required to select a Manual Entry Reason Code and/or a Manual Entry Action Taken Code for each manually completed visits. Depending on the Reason/Action Code selected, you may also be required to enter a note to provide additional details for manually completing the visit.

Disclaimer: *The Manual Entry Reason option is only applicable for Providers who do not have a Mobile Caregiver+ Claims Console subscription. If you do not see this option, skip to step 7.*

- ii. Click in the **Missed Visit Action Taken** field and select an Action Code for canceling the visit.
 - iii. Depending on the selected Action Code, you may be required to enter a note to provide additional information for canceling the visit.
 - iv. Click in the **Note** field to enter a note providing additional details.
7. Click the blue **Save** command to save the data and to exit the Complete Visit form.

*Note: Clicking the **Cancel** command will discard all entries and exit the Complete Visit form.*

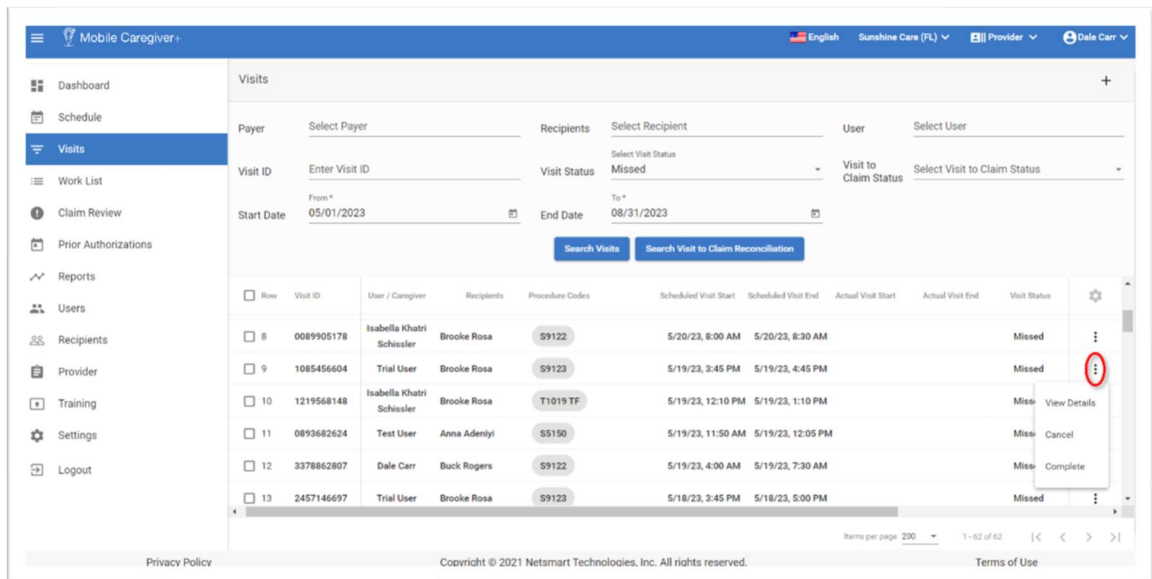


7.3. Canceling Missed and Not Started, Late Visits

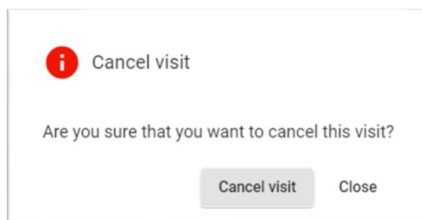
The Mobile Caregiver+ Provider Portal allows Users to cancel scheduled visits with Missed or Not Started, Late statuses. The system allows Users to delete future visits with Not Started statuses.

To cancel a Missed or Not Started, Late visit:

1. From the Main Menu, click **Visits**.

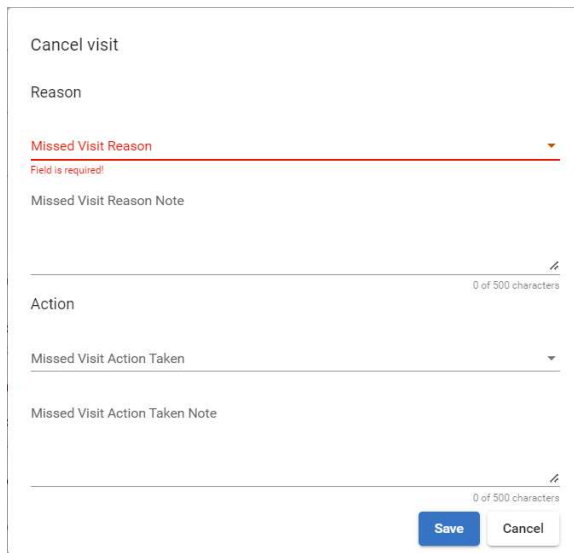


2. Find the visit you want to cancel and click the Actions icon, ⋮.
3. From the shortcut submenu, click **Cancel**.



4. From the Cancel visit confirmation dialog box, click **Cancel visit**.

Caregivers are required to select a Missed Visit Reason Code for canceling visits. Depending on the Reason Code selected, Caregivers may be required to enter a note to provide additional details for canceling a scheduled visit.



5. Click in the **Missed Visit Reason** field and select a Reason Code for canceling the visit.

Depending on the selected Reason Code, you may be required to enter a note to provide additional information for canceling the visit.

6. Click in the **Note** field to enter a note providing additional details.

Note: Depending on the Payer and Program Recipients are enrolled with, you may be required to select a Missed Visit Action Taken Code for canceling a visit.

Depending on the Reason/Action Code selected, you may also be required to enter a note to provide additional details for canceling the visit.

Disclaimer: The Missed Visit Action Taken option is only applicable for Providers who do not have Mobile Caregiver+ Claims Console subscriptions. If you do not see this option, skip to step 8.

- i. Click in the **Missed Visit Action Taken** field and select an Action Code for canceling the visit.
 - ii. Depending on the selected Action Code, you may be required to enter a note to provide additional information for canceling the visit.
 - iii. Click in the **Note** field to enter a note providing additional details.
7. Click **Save**.

Note: If the visit is a recurring visit, the system will display the Cancel recurring visit dialog box. Users will have the option to cancel the selected visit (ONLY THIS

VISIT), or to cancel the selected visit all other upcoming visits in the series (THIS VISIT AND REOCCURRING AFTER).

Cancel recurring visit

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

8. Choose a Cancel recurring visit option:

- Click **ONLY THIS VISIT** to only cancel the selected visit.
- Click **THIS AND RECURRING AFTER** to cancel all scheduled recurring visits that currently have Missed or Not Started, Late statuses. Also, the system will automatically delete all recurring visits scheduled afterward that currently have Not Started statuses.

Warning: Choosing "This Visit and Reoccurring After" will cancel the selected visit and all other scheduled visits that currently have Missed or Not Started late statuses. Furthermore, the system will delete all scheduled visits that currently have Not Started statuses.

****Note: Canceled visits that have Missed or Not Started, Late statuses will be displayed in the Visits List and Schedule Calendar with a status of "Unable to Complete."****

Canceled visits that had Not Started statuses will be Deleted and removed from the Caregiver's schedule on the mobile application, as well as from the Visits List and the Schedule Calendar on the Provider Portal. Deleted visits can be viewed in the Visit Report.

7.4. Editing/Rescheduling Visits

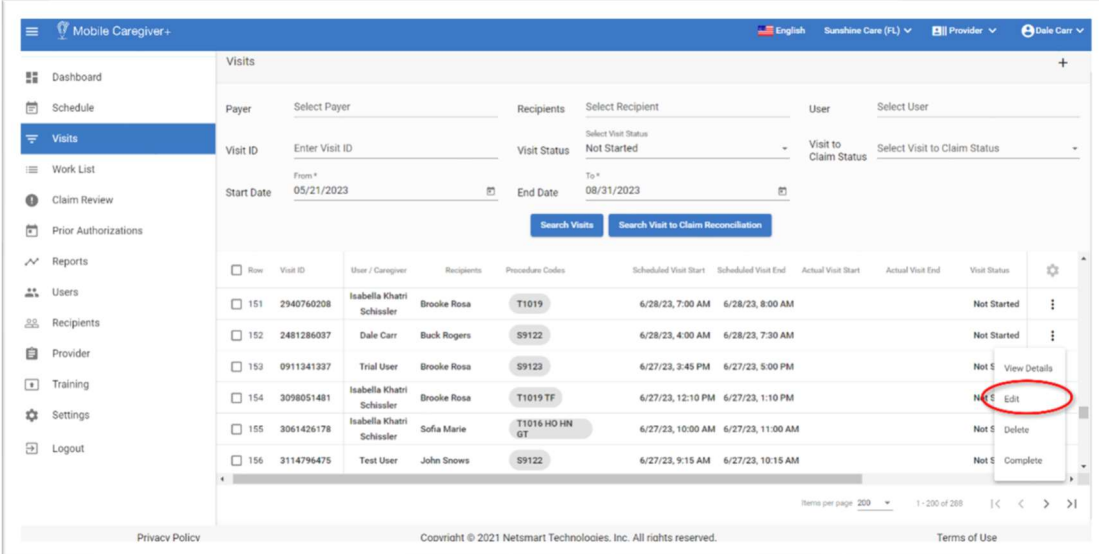
Providers can edit scheduled visits to modify one or more of the following:

- Recipient data, i.e., Diagnosis Code and/or Referring Physician.
- The assigned Caregiver.
- The assigned Services, Tasks, and Modifiers.
- The scheduled Start/End Address(es).
- The scheduled Start Date and/or Start Time.
- Recurring visit settings and expiration.

Users can edit scheduled visits that have a *Not Started* or *Not Started Late* status.

To edit scheduled visits, Users can access the [Visit Detail](#) and click the **Edit** option or:

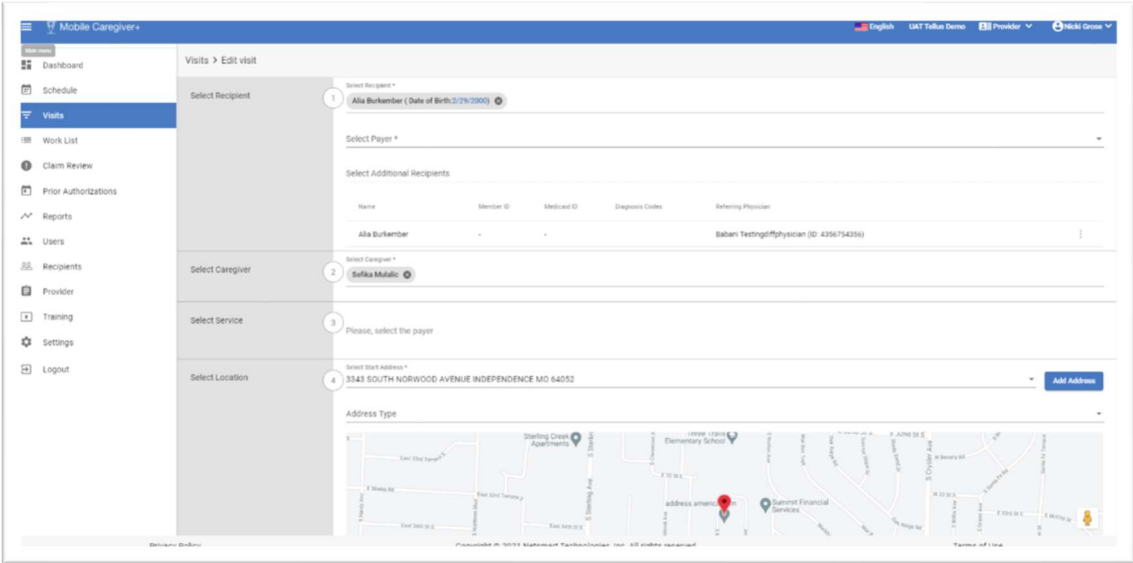
1. From the Main Menu, click **Visits**.



The screenshot displays the 'Visits' management interface. At the top, there are search filters for Payer, Recipients, User, Visit ID, Visit Status (set to 'Not Started'), and Visit to Claim Status. Below the filters are search buttons: 'Search Visits' and 'Search Visit to Claim Reconciliation'. A table lists the search results with columns for Row, Visit ID, User / Caregiver, Recipients, Procedure Codes, Scheduled Visit Start, Scheduled Visit End, Actual Visit Start, Actual Visit End, and Visit Status. The table contains six rows of data. The 'Edit' option in the actions menu for the third row (Visit ID 154) is highlighted with a red circle.

Row	Visit ID	User / Caregiver	Recipients	Procedure Codes	Scheduled Visit Start	Scheduled Visit End	Actual Visit Start	Actual Visit End	Visit Status	Actions
151	2940760208	Isabella Khatri Schissler	Brooke Rosa	T1019	6/28/23, 7:00 AM	6/28/23, 8:00 AM			Not Started	⋮
152	2481286037	Dale Carr	Buck Rogers	S9122	6/28/23, 4:00 AM	6/28/23, 7:30 AM			Not Started	⋮
153	0911341337	Trial User	Brooke Rosa	S9123	6/27/23, 3:45 PM	6/27/23, 5:00 PM			Not Started	⋮
154	3098051481	Isabella Khatri Schissler	Brooke Rosa	T1019 TF	6/27/23, 12:10 PM	6/27/23, 1:10 PM			Not Started	⋮ Edit
155	3061426178	Isabella Khatri Schissler	Sofia Marie	T1016 HO HN GT	6/27/23, 10:00 AM	6/27/23, 11:00 AM			Not Started	⋮ Delete
156	3114796475	Test User	John Snows	S9122	6/27/23, 9:15 AM	6/27/23, 10:15 AM			Not Started	⋮ Complete

2. Search for the Not Started visit and click the Actions icon, ⋮.
3. From the shortcut submenu, click **Edit** to view the Edit visit form.



Note: The Edit Visit form is identical to the Add New Visit form. The Edit Visit form allows Provider Admins to make corrections and update scheduled visits by editing/rescheduling data entries that were made in all six (6) sections of the Add New Visit form.

All changes can be applied to a single visit (the selected visit) or to the selected visit and all scheduled recurring visits that follow.

4. From the Edit Visit form, configure the following:

7.4.1. Section 1 – Select Recipient(s)

Users can edit one or more of the following entries in Section 1:

- The Payer Plan/Program.
- Select or remove additional Recipients.
- Edit/update the Recipient’s Diagnosis Code.
- Select a different Referring Physician.

7.4.2. Section 2 – Select Caregiver

- Used to switch the scheduled Caregiver.

7.4.3. Section 3 – Select Service

Users can edit the following entries:

- Edit/update the assigned services and Tasks.
- Edit/update Service Modifiers.

7.4.4. Section 4 – Select Location


Users can edit the following entries:

- Edit/update the scheduled Start and End Address(es).
- Add additional addresses and change Primary Address

7.4.5. Section 5 – Select Date and Time

Users can edit the following entries:

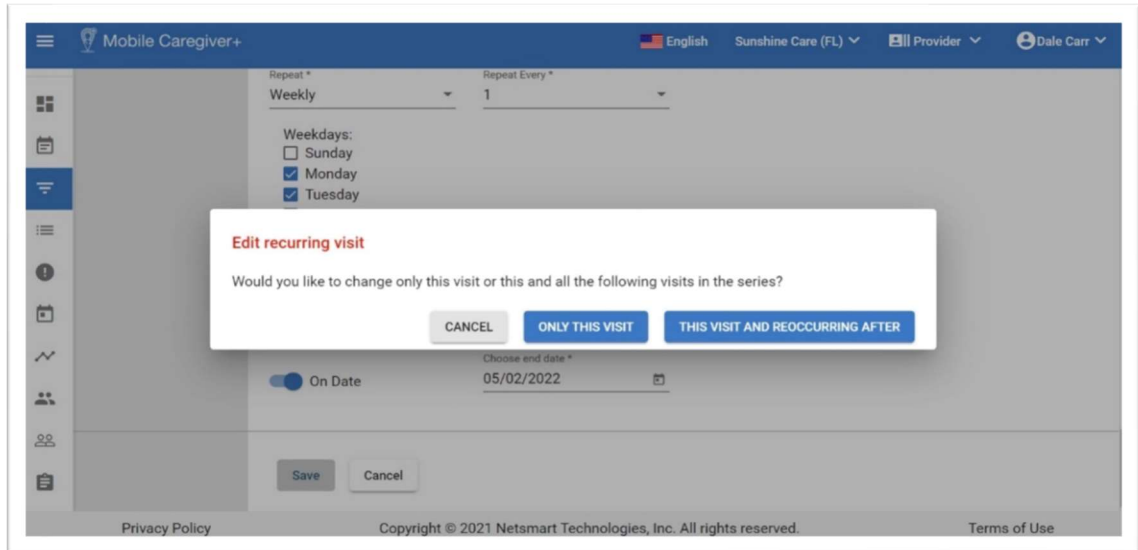
- Edit/update the scheduled Visit Start Date and/or Duration.

Note: Visits that are rescheduled to start on a different date will be saved as "rescheduled" visits and will display the "rescheduled" icon ,  , to the left of the visit's new Scheduled Start Date in the Visits List.

7.4.6. Section 6 – Select Visit Recurrence

Users can adjust the following entries:

- Edit/update the Repeat pattern.
 - Edit/update the Repeat Every, skip, interval.
 - Change the expiration option.
 - Edit the expiration date. Users can extend the expiration date by activating the **On Date** switch and entering a later date that is within 1 year of the Start Date. The system will automatically reset the Start Date to the current date, thereby allowing Users to extend the date by one year from the current date.
5. Users should review all scheduling entries and then click the blue **Save** command to update the scheduled visit(s) in the Provider EVV Portal.

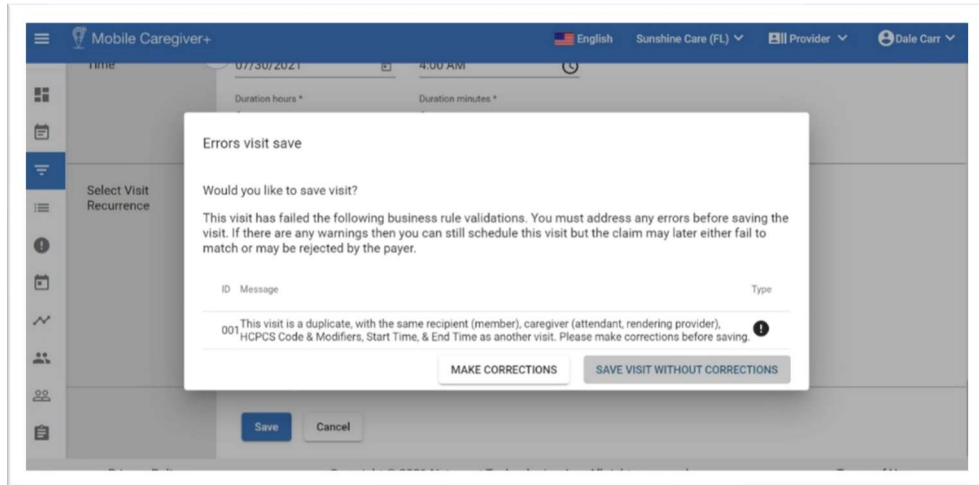


Note: If the edited visit being saved is one in a series of recurring visits, the system will display the Edit recurring visit dialog box. The system will offer Users one of two options when saving updates for recurring visits:

- If the changes made are only being applied to the selected visit, then click the blue **ONLY THIS VISIT** command.
- Or
- If the changes are to be applied to the selected visit and all other recurring visits scheduled afterwards, click the **THIS VISIT AND REOCCURRING AFTER** command.

The system will then use the designated Payer’s business rule to screen the scheduling entries to ensure that the visit adheres to the Payer’s policies and procedures. The system will return one of two outcomes:

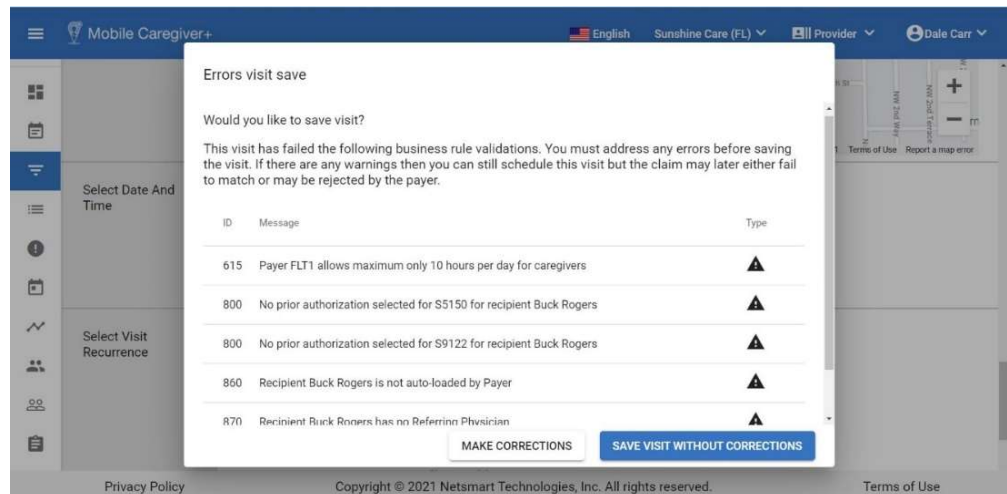
- **No Reported Violations:** Visits that have no reported errors/faults and do not violate any of the Payer’s rules are automatically added to the Provider Portal.
- **Reported Violations:** Visits that have one or more reported errors/faults (violating one or more of the Payer’s rules) will generate one or more warnings and/or one or more critical error message(s).
- **Critical Error:** Critical Error message indicates that the visit being scheduled has at least one major violation and cannot be saved. Users will only be given the option to **MAKE CORRECTIONS** for Critical Errors.



*Note: Users must click the **MAKE CORRECTIONS** command and fix reported critical errors before a visit can be saved.*

- **Warning Error:**

A Warning Error indicates that the visit being scheduled violates one or more of the Payer's rules but does not have any major violations. Users have the option to **SAVE VISIT WITHOUT CORRECTIONS**.



*Note: Users have the option to click the **MAKE CORRECTION** command and fix reported warning errors before saving the visit or click the **SAVE VISIT WITHOUT CORRECTIONS** command to save the visit and make corrections later.*

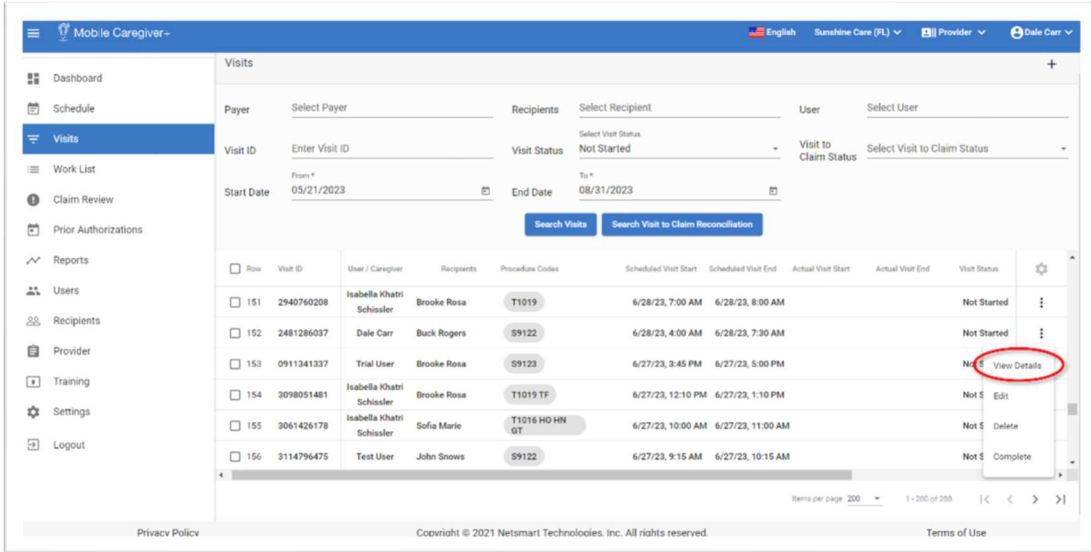
6. For Critical Errors, click **MAKE CORRECTIONS** to edit any reported errors and try to resave the visit, or for visits with warnings, click **SAVE VISIT WITHOUT CORRECTIONS** to save the changes.

7.5. Viewing/Printing Visit Detail

Users can print visit details for any visit, regardless of its status.

To print a visit's details:

1. From the Main Menu, click **Visits**.



Row	Visit ID	User / Caregiver	Recipients	Procedure Codes	Scheduled Visit Start	Scheduled Visit End	Actual Visit Start	Actual Visit End	Visit Status	Actions
151	2940760208	Isabella Khatri Schissler	Brooke Rosa	T1019	6/28/23, 7:00 AM	6/28/23, 8:00 AM			Not Started	⋮
152	2481286037	Dale Carr	Buck Rogers	S9122	6/28/23, 4:00 AM	6/28/23, 7:30 AM			Not Started	⋮
153	0911341337	Trial User	Brooke Rosa	S9123	6/27/23, 3:45 PM	6/27/23, 5:00 PM			Not Started	View Details
154	3098051481	Isabella Khatri Schissler	Brooke Rosa	T1019 TF	6/27/23, 12:10 PM	6/27/23, 1:10 PM			Not Started	Edit
155	3061426178	Isabella Khatri Schissler	Sofia Marie	T1016 HO HN GT	6/27/23, 10:00 AM	6/27/23, 11:00 AM			Not Started	Delete
156	3114796475	Test User	John Snows	S9122	6/27/23, 9:15 AM	6/27/23, 10:15 AM			Not Started	Complete

2. Locate the visit you want to view details for and click on the Actions icon, ⋮.
3. From the shortcut submenu, click **View Details**. The system will display the Visit Status Details screen.

4. From the Visit Details screen, click **Print**.

Visit ✕

Status: Missed Visit Status: -
 Caregiver: Test User Visit Status Detail: -
 Recipients: Buck Rogers Notes: -

Claims: (1 item(s)) ^

Claim Status	Invoice ID #	Recipient
-		Buck Rogers

Completed Tasks: (1 item(s)) ^

HCPCS Code/Mods	HCPCS Description	Tasks Description
S9122 -	Home health aide or certify	Medical Appointments Supervision Shopping/Shopping List Laundry Personal Care - General

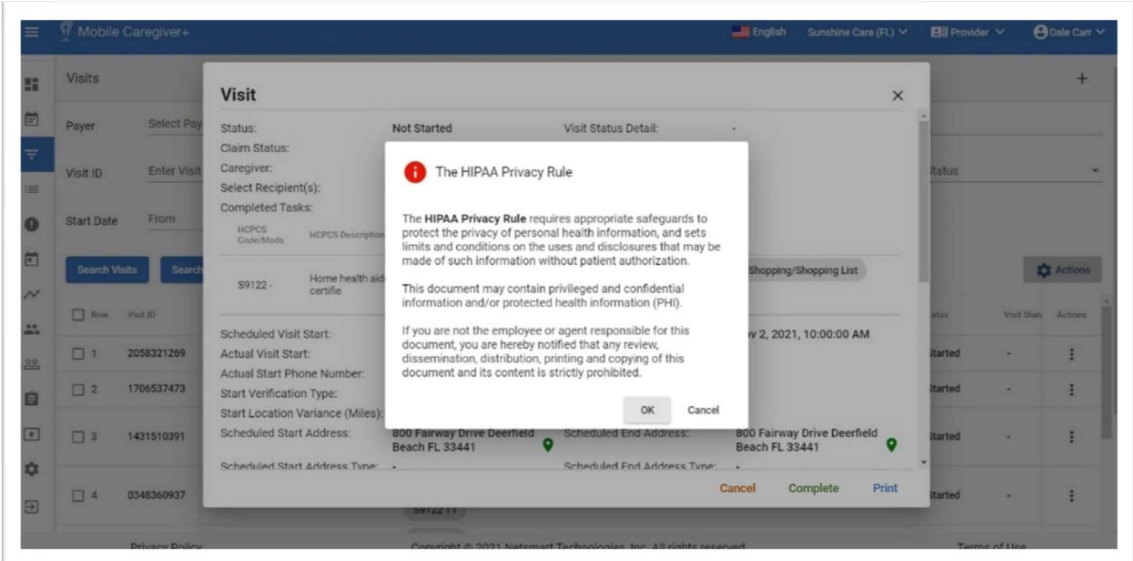
Addresses:

Scheduled Visit Start: Aug 1, 2023, 6:00:00 PM Scheduled Visit End: Aug 1, 2023, 9:00:00 PM

Cancel
Complete
Print

Note: The system will display the HIPAA Privacy Rule dialog box.

5. Review the HIPAA Privacy Rule notification, then click **OK**.



The screenshot shows the 'Visit' details screen with a modal dialog box titled 'The HIPAA Privacy Rule'. The dialog box contains the following text:

The HIPAA Privacy Rule

The HIPAA Privacy Rule requires appropriate safeguards to protect the privacy of personal health information, and sets limits and conditions on the uses and disclosures that may be made of such information without patient authorization.

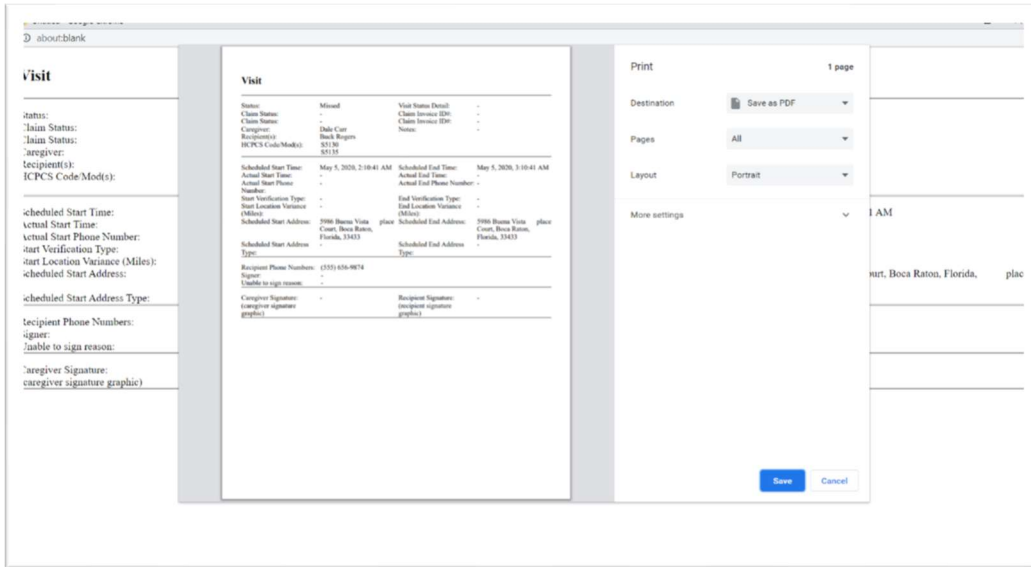
This document may contain privileged and confidential information and/or protected health information (PHI).

If you are not the employee or agent responsible for this document, you are hereby notified that any review, dissemination, distribution, printing and copying of this document and its content is strictly prohibited.

Buttons: OK, Cancel



- Click in the print **Destination**, **Pages**, and **Layout** fields to configure any other optional settings.



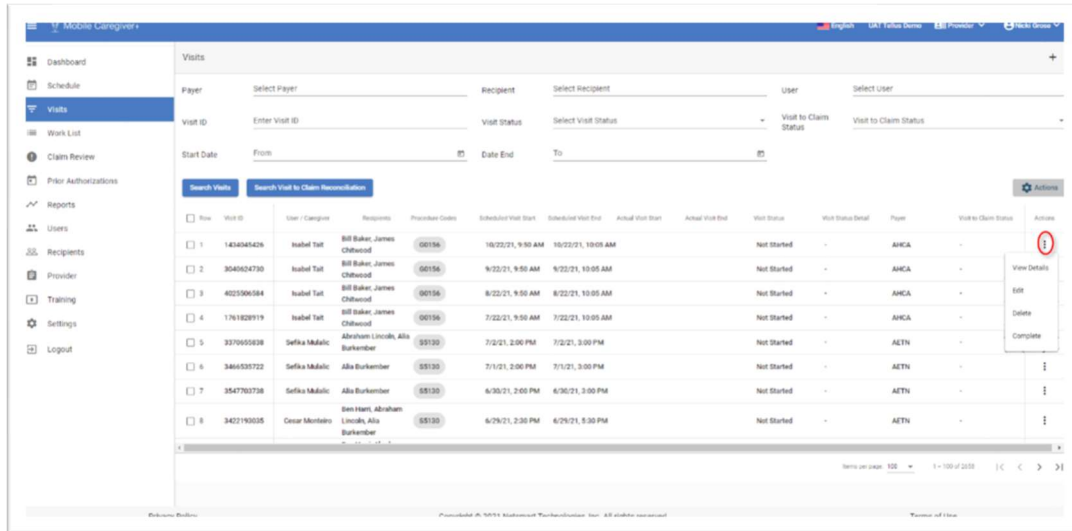
- Click the **Print** command (or **Save** to generate a PDF file) to print/save the visit details.

7.6. Deleting a Visit

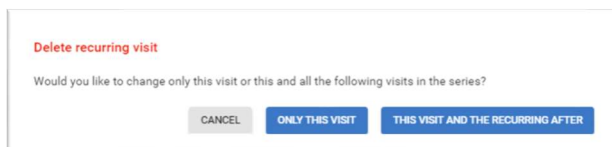
Users can only delete visits that have a Not Started status (future visits).

To delete a visit:

1. From the Main Menu, click **Visits**.



2. Find the visit you want to delete.
3. Click the Actions icon, ⋮, for the visit you want to delete.
4. From the shortcut submenu, click **Delete**. The system will automatically delete non-recurring visits.
5. For recurring visits, the system will display the Delete recurring visit dialog box.



6. Click **ONLY THIS VISIT** to delete the single visit that was selected.
7. Click **THIS VISIT AND THE RECURRING AFTER** to delete the selected visit and all recurring visits scheduled afterward.

Note: Deleted visits will be removed from Caregiver's schedule on the mobile application, as well as from the Visits List and the Schedule Calendar on the Provider Portal. Deleted visits can be viewed in the Visit Report. Reports.

8. Managing Users

Viewing Users

Changing the Number of Users Displayed per Page

Searching for a Specific User

Viewing User Profile Details

Viewing Provider Specific User Identifiers

Editing User Profile Details

Manually Adding New Users

Inviting/Linking Users with Existing User Accounts to an Agency

Importing/Adding New Users via CSV File

Completing the New User Spreadsheet

Importing Users From a CSV Template

Sending a Message to a User

Messaging Users from the Recipient Linked Users Tab

Unicast – Texting Individual Linked Caregiver

Multicast – Texting Multiple Linked Caregivers

Resetting User Password

Unlinking Users From an Agency and Reassigning Tasks

Updating User Profile Details

Editing User Roles

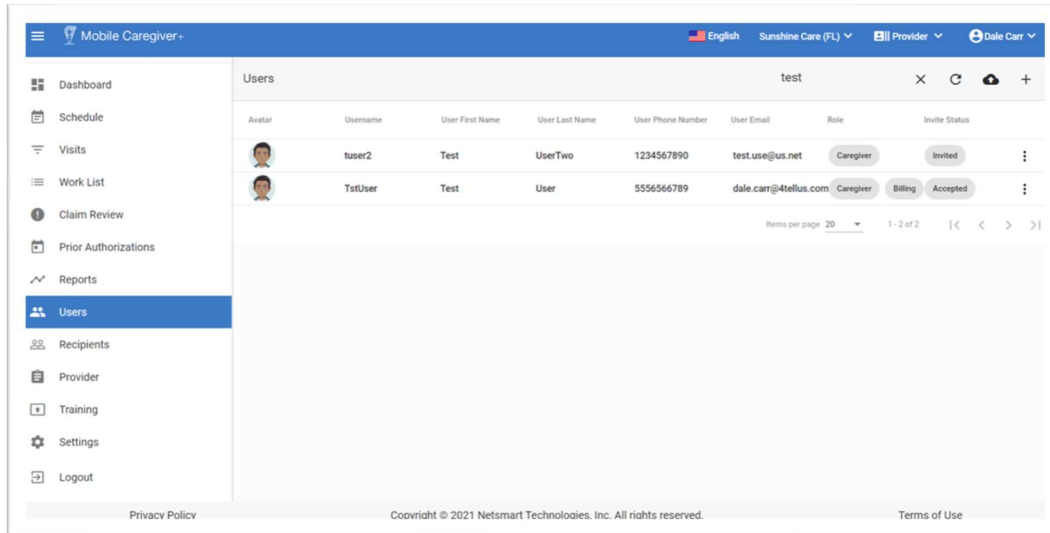
All Users must have registered Mobile Caregiver+ User accounts to log in to the Mobile Caregiver+ Provider Portal.

Each agency must designate at least one Provider Administrator (Provider Admin) during the [registration](#) process. Provider Admins will be responsible for creating and managing additional Mobile Caregiver+ User Accounts for their Provider Agencies.


8.1. Viewing Users

To view a list of Users that are linked to the active Provider:

1. From the Main Menu, click **Users** to open the Users List.



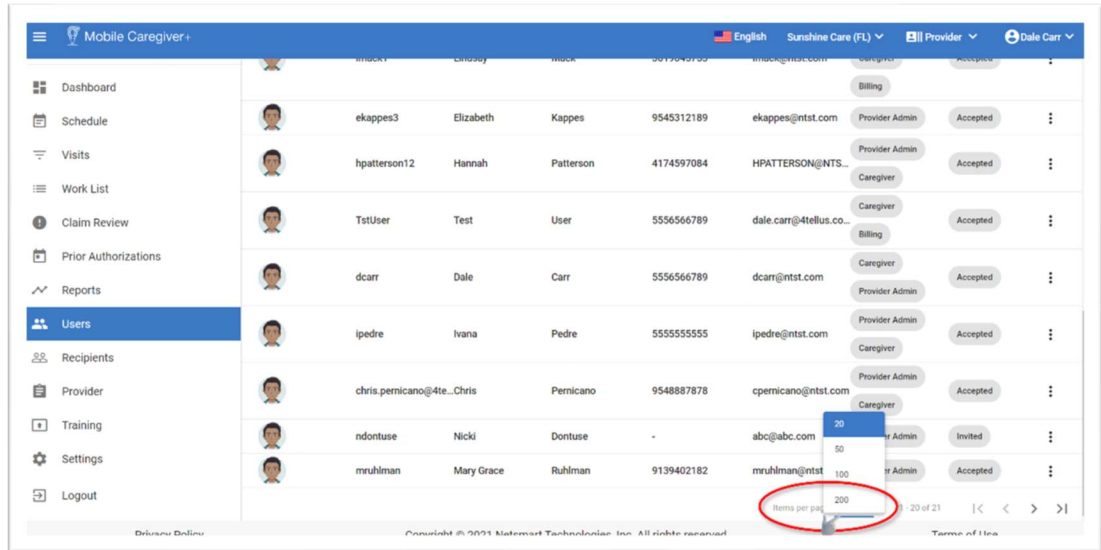
2. The **Users List** will display the following information for all Users.

- Avatar.
- Username.
- First name.
- Last name.
- Phone.
- Email.
- Role.
- Invite Status.
- An Actions icon, , that offers shortcut submenu options for User management:
 - **Send message to User.**(Used to send HIPAA complaint messages to Caregivers).
 - **Reset User password.**
 - **Unlink User** (Unlinks User from the current agency and reassign their tasks).
 - **Details** (view or update User profile details).
 - **Edit User Roles.**

8.1.1. Changing the Number of Users Displayed per Page

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

- i. From the Main Menu, click **Users**.

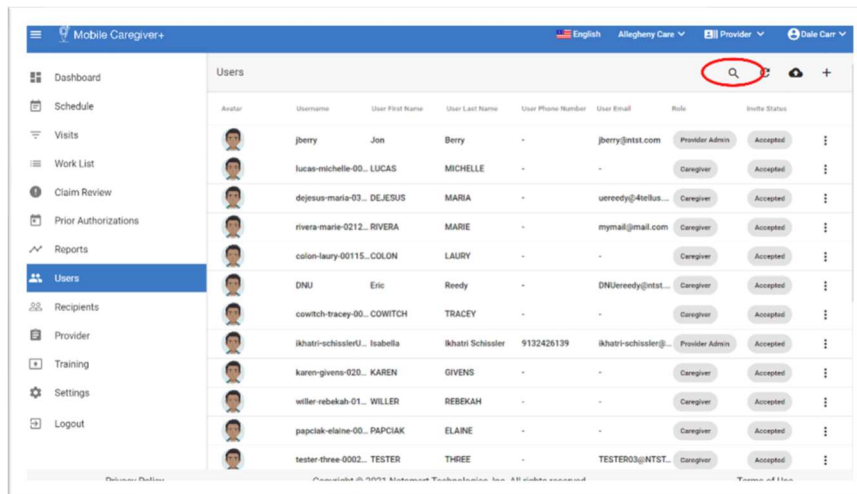



- ii. Scroll to the bottom of the page.
- iii. Click the **Items per page** drop-down arrow and select 20, 50, 100, or 200 Users per page. The Users as well as the counter at the bottom of your screen are updated to reflect the range of records presented (for example, 1–20 of 74 records).
- iv. If there are too many Users to display on a single screen, then use the navigation icons, located at the bottom right corner of the screen, to scroll between pages.

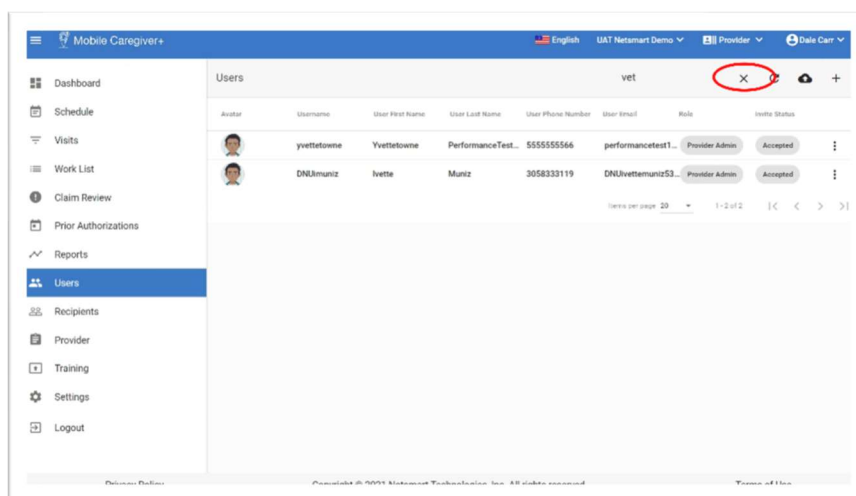
8.1.2. Searching for a Specific User

To search for a specific User:

- i. From the Main Menu, click **Users** to view the Users List.




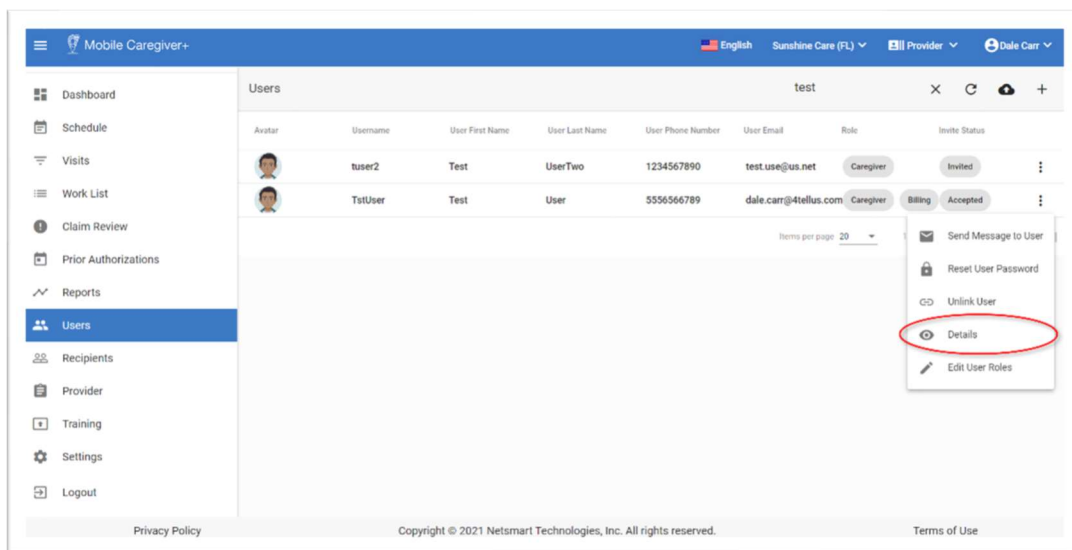
- ii. Click the search icon, , located in the top-right corner of the screen.
- iii. Enter all or part of a Username, first or last name, or all or part of an email address in the **Search User** field that displays and press the Enter key.
The system will display a list of Users that match the search parameter.
- iv. Users can sort the list by clicking on any of the following column labels: **Username, User First Name, User Last Name, Phone Number, or Email.**
- v. Click “X” to clear the search parameter.



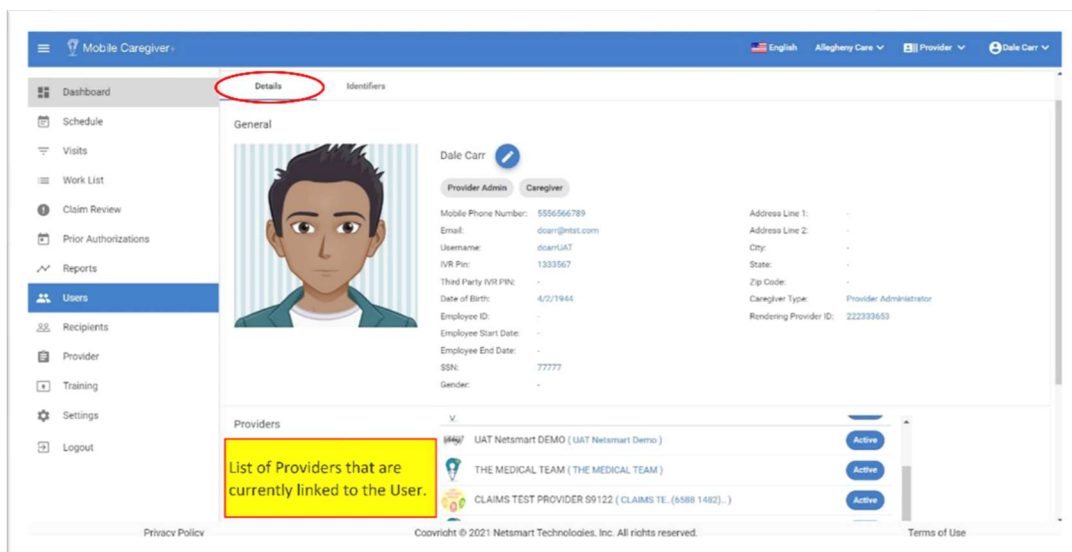
8.2. Viewing User Profile Details

To view the details for a Mobile Caregiver+ User account:

1. From the Main Menu, click **Users**.
2. Locate the Mobile Caregiver+ User profile that you want to view.
3. Click the Actions icon, , located to the right.
4. From the shortcut submenu, click **Details**.



Note: By default, the system will automatically display the Details tab.




5. The Details tab of the User's profile screen displays the following information:

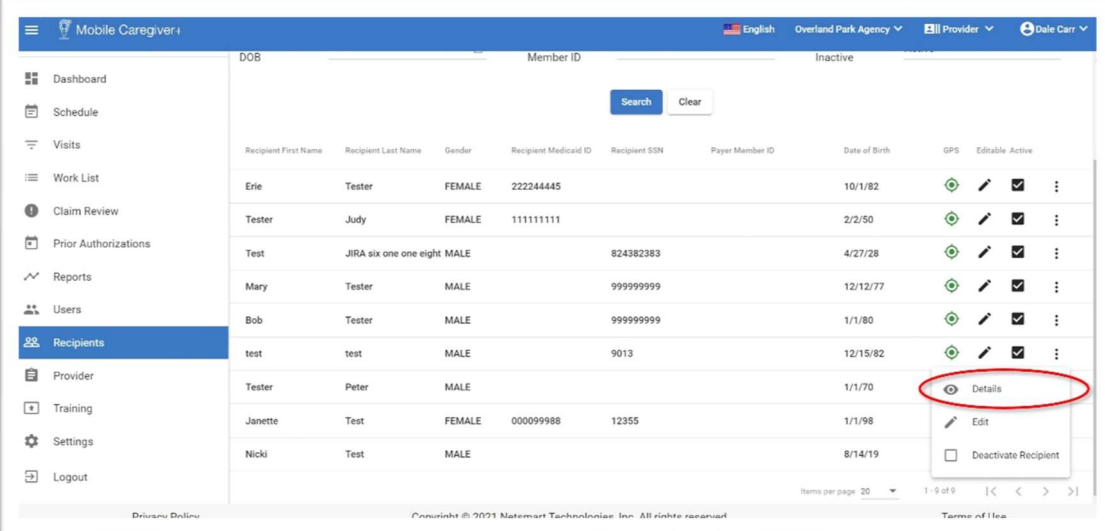
- Mobile Phone Number.
- Email Address.
- Username (this will be the ID that Users use to log in.
- IVR pin (Only User that have Payer approval will receive IVR Pins).
- Date of Birth
- Employee ID.
- Employee Start Date.
- Employee End Date
- SSN.
- Gender
- Address Line 1.
- Address Line 2
- City.
- State.
- Zip Code.
- Caregiver Type.
- Rendering Provider ID.
- Provider (Displays a list of Providers that are currently linked to the User).

8.3. Viewing Provider Specific User Identifiers

Disclaimer: This option will *ONLY* be available for Mobile Caregiver+ Users that are employed by Providers who have Netsmart CareRecord subscriptions.

To view the Provider Specific User Identifiers for a Mobile Caregiver+ User account:

1. From the Main Menu, click **Users**.
2. Find the User whose detail/profile you want to view.
3. Click the Actions icon, , located to the right of the User's record.
4. From the shortcut submenu, click **Details**.

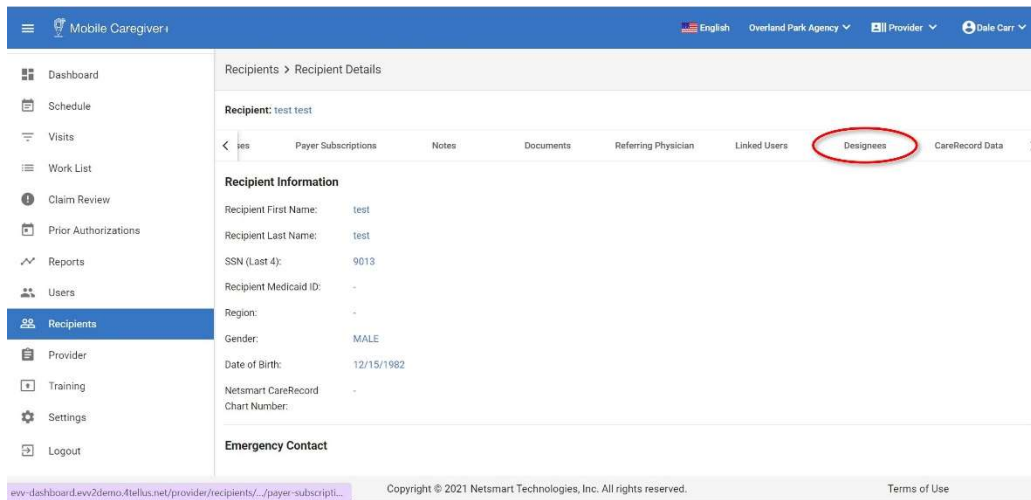


The screenshot shows the 'Recipients' page in the Mobile Caregiver+ portal. The page has a blue header with the logo and navigation options. A left sidebar contains a menu with 'Recipients' selected. The main area displays a table of recipients with columns for Recipient First Name, Recipient Last Name, Gender, Recipient Medicaid ID, Recipient SSN, Payer Member ID, Date of Birth, GPS, and Editable Active. A search bar is at the top right of the table. An actions menu is open for the recipient 'test', with 'Details' circled in red. Other options in the menu are 'Edit' and 'Deactivate Recipient'.


Recipient First Name	Recipient Last Name	Gender	Recipient Medicaid ID	Recipient SSN	Payer Member ID	Date of Birth	GPS	Editable	Active
Erie	Tester	FEMALE	222244445			10/1/82			<input checked="" type="checkbox"/>
Tester	Judy	FEMALE	111111111			2/2/50			<input checked="" type="checkbox"/>
Test	JIRA six one one eight	MALE		824382383		4/27/28			<input checked="" type="checkbox"/>
Mary	Tester	MALE		999999999		12/12/77			<input checked="" type="checkbox"/>
Bob	Tester	MALE		999999999		1/1/80			<input checked="" type="checkbox"/>
test	test	MALE		9013		12/15/82			<input checked="" type="checkbox"/>
Tester	Peter	MALE				1/1/70			<input checked="" type="checkbox"/>
Janette	Test	FEMALE	000099988	12355		1/1/98			<input checked="" type="checkbox"/>
Nicki	Test	MALE				8/14/19			<input checked="" type="checkbox"/>



5. From the Recipient Details screen, click on the **Identifiers** tab.




6. The Identifiers tab of User Profile screen displays the following information for each User:

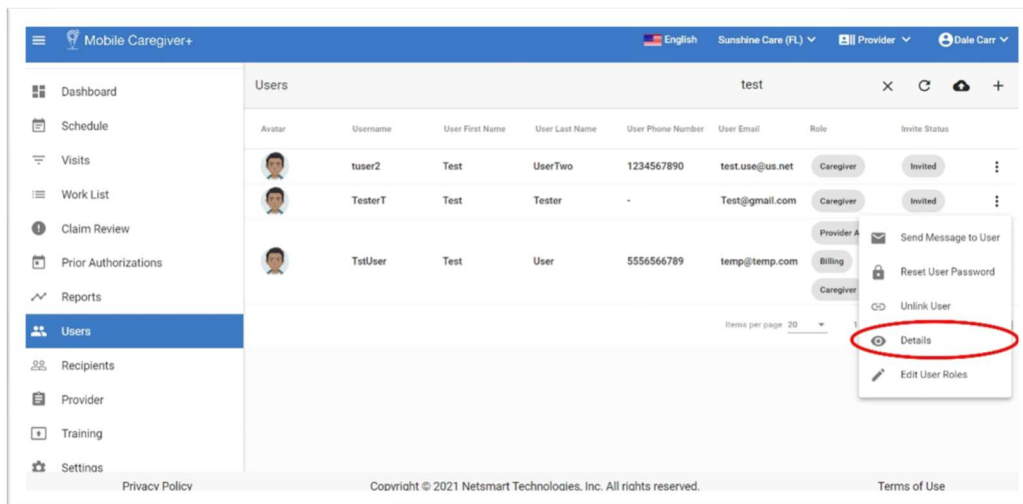
- Type.
- Value.
-  (Add User Identifier).




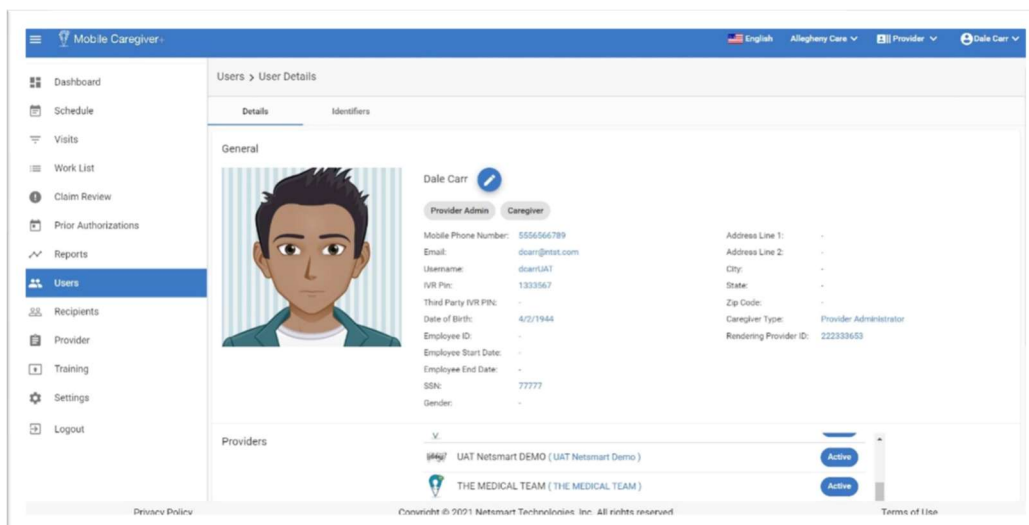
8.4. Editing User Profile Details

To view profile details for a specific User:

1. From the Main Menu, click **Users**.
2. Find the User whose detail/profile you want to view.
3. Click the Actions icon, , located to the right of the User's record.
4. From the shortcut submenu, click **Details**.



5. From the User Details screen, click the edit icon, , to update the User's profile, i.e., email address, phone number, etc.



6. Make all necessary changes.

Edit User

Enter First Name * Test	Enter Last Name * User
Enter Phone Number (555) 632-1963	Enter Email dcarr798@gmail.com
Enter Caregiver Type * Other	Date of Birth
Enter Rendering Provider ID 123456789	Enter SSN
Roles * Direct Service Provider Billing	Enter Gender
Enter Employee ID	Employee Effective Start Date
Employee Effective End Date	Username * TstUser
Enter IVR Pin	Enter Third Party IVR PIN
Enter Address Line 1	Enter Address Line 2

7. Click the blue **Update** command to save the changes.

Note: Provider Admins will not be able to edit all profile information for Users that are linked to multiple agencies. Users that are linked to multiple agencies may have to log in on the Mobile Caregiver+ Mobile Application and edit their own profiles.

8.5. Manually Adding New Users

All Users must have a Mobile Caregiver+ User account in order to use Netsmart Mobile Caregiver+ software applications.

Warning: *Each User should only have one Mobile Caregiver+ User account. Users can work for more than one agency using a single account. Do not create new accounts for Users that have existing Mobile Caregiver+ accounts. Users with existing accounts can be [invited to link to other agencies](#).*

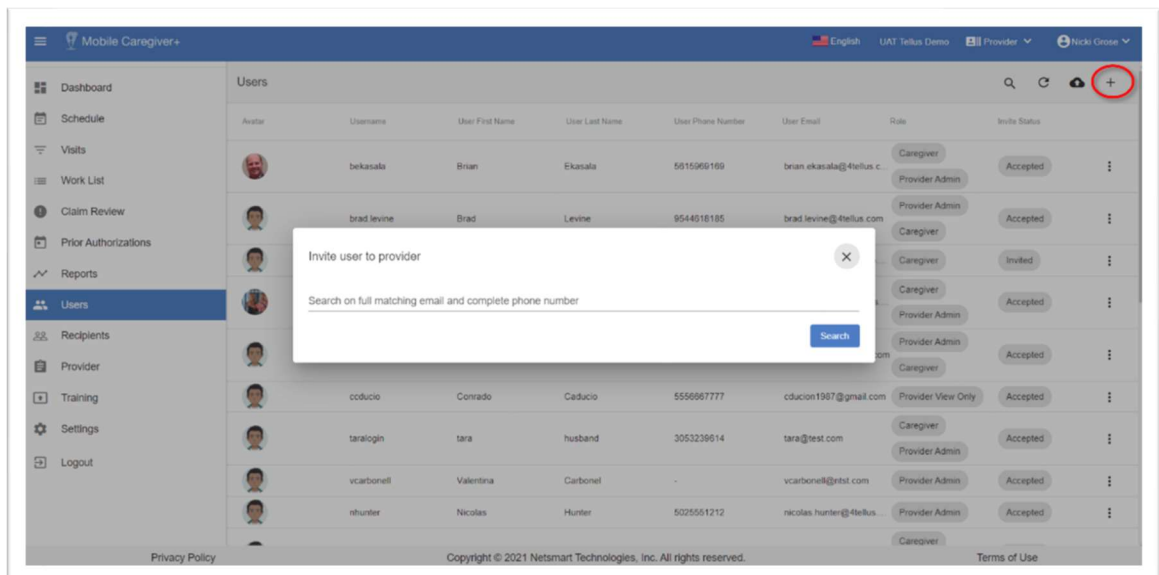
When a Provider Admin adds a new User to the Mobile Caregiver+ Portal, the system sends two email invitations to the email address listed in the User’s profile. One email will contain the new User’s login ID and the other will contain a temporary password. The system will automatically link the new User account to the Provider Agency.

Provider Admins can [link Users with existing Mobile Caregiver+ User accounts](#) to their agencies.

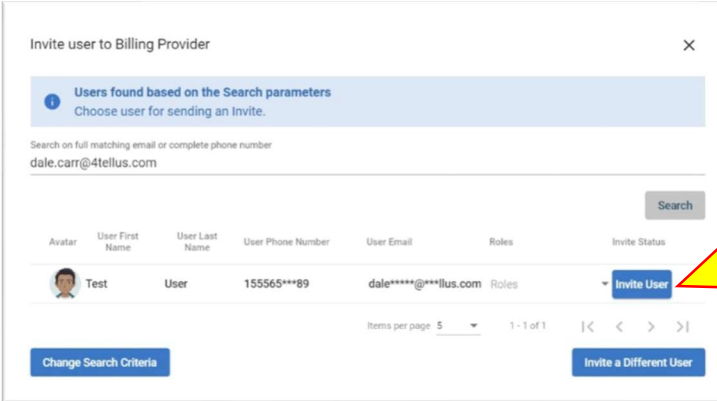
Provider Admins have two options when adding new User to the Mobile Caregiver+ Provider Portal. Provider Admins can either manually add individual Users, or [import users from a CSV file](#).

To manually add an individual User to the Mobile Caregiver+ Provider Portal:

1. From the Main Menu, click **Users**.



2. Click the **Add user to provider** command, **+**, to display the Invite user to provider dialog box.
3. Enter the new User's email address or phone number.
4. Click the blue **Search** command.



A blue button labeled **Invite User**, indicates the User is not currently linked to the agency.

A gray button labeled **Invited** indicates that an invitation has already been extended to the User.

Note: Providers are required to search for an existing User account, even if the User does not have an existing account, before adding a new User to an agency.

If there are no matching entries, the system will automatically display the Invite user to provider form (please refer to step 5).

The system will display a list of all existing Mobile Caregiver+ User accounts that have a matching email address or phone number in their profiles.

Note: If there are matching entries, carefully review the list to determine if the User has an existing account. Do not create duplicate accounts (view the instructions for [Inviting/Linking Users with an Existing User Account to an Agency](#))

*If the User does not own any of the listed accounts, click the blue **Invite a Different User** command to create a new User account. The system will display the Invite user to provider dialog box. Remember, while Users may have a common email address or phone number, no two Users can have the same email address and the same phone number in their Mobile Caregiver+ profiles.*

Invite user to provider
×

Users found based on the Search parameters
Choose user for sending an Invite.

Search on full matching email or complete phone number *

5556566789

Avatar	User First Name	User Last Name	User Phone Number	User Email	Roles	Invite Status
	Dale	Carr	15565***89	dc***@**st.com	<div style="display: flex; gap: 5px;"> Admin Caregiver </div>	<div style="background-color: #ccc; padding: 2px 5px; border-radius: 3px;">Case Manager Admin</div> <div style="background-color: #ccc; padding: 2px 5px; border-radius: 3px;">Invited</div>
	Test	User	15565***89	te**@**mp.com	<div style="display: flex; gap: 5px;"> Admin Billing </div>	<div style="background-color: #ccc; padding: 2px 5px; border-radius: 3px;">Caregiver</div> <div style="background-color: #ccc; padding: 2px 5px; border-radius: 3px;">Invited</div>

Items per page 5

1-2 of 2

<< >>

Change Search Criteria

Invite a Different User

5. Enter the new User’s information in the Invite user to provider form:

- **First name:** (Required) Enter the new User’s first name.
- **Last name:** (Required) Enter the new User’s last name.
- **Username:** (Required) Enter the new User’s preferred Username. This is the **Username:** that will be used as the User’s login ID.
- **Mobile Phone Number** (required if no email address is entered): 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 no Mobile Phone Number is entered): Enter the new User’s valid email address. This can be used for notification and password reset purposes.
- **IVR Pin:** (Optional) The system will automatically generate a seven-digit numeric personal identification number.
- **Caregiver Type:** (Required) Click on the drop-down list arrow to see the available types. Users can only be assigned one Caregiver Type.
- **Date of Birth:** (Optional) Enter the User’s date of birth.
- **Rendering Provider ID:** (Optional) Caregivers such as Home Health Aides and Personal Assistants usually do not have a NPI number; Caregivers with professional and paraprofessional licenses and certifications, such as Licensed Practical Nurses, Behavioral Analysts, etc., usually have an



officially registered NPI number. If the Caregiver does have an NPI number, enter the NPI number.

- **SSN:** (Optional) Enter the Caregiver’s nine-digit Social Security number.
- **Roles:** (Required) Roles are used to assign access rights and permissions to Mobile Caregiver+ User Accounts; each role grants Users a specific set of access rights and permissions to certain features, functions, and objects in Netsmart’s Mobile Caregiver+ software applications.

6. Click on the drop-down list to view and/or to select one or more of the following User roles:

User Role	Description: Rights and Permissions
Provider Admin	Users that are assigned the role of Provider Admin will have access rights to all billing Provider features and functions of their agency’s Mobile Caregiver+ Provider Portal. Provider Admin Users can manage all Users and objects, including creating new Users, objects and assigning roles. Provider Admin Users must also be assigned the Caregiver role in order for an Admin User to be able to do visits. ***
Billing	Users that are assigned the role of Billing will have limited access rights to claims functions and features, i.e., to view Visits, Work List items, Claim Review items, Prior Authorizations, and process claims.
Caregiver	Users that are assigned the role of Caregiver will have access rights to log in to the Mobile Caregiver+ app and complete visits (record rendered services). Caregivers will only have access to PHI data for Recipients that have been assigned to them. To assign a Recipient to a Caregiver, a Provider Admins must either schedule an initial visit with the Recipient and the Caregiver from the Provider Portal, or link t.

Note: A User’s assigned role will determine which features and functions the User will be able to access. Multiple User roles can be assigned to a single account.

7. Click the blue **Invite New User** command to save the account and send an invitation to the new User.

Note: The User’s information will be saved, and the system will return to the Users page.

An email will be sent to the User to activate their account. The User will have 36 hours to activate the invitation before it expires; to resend an invitation for one

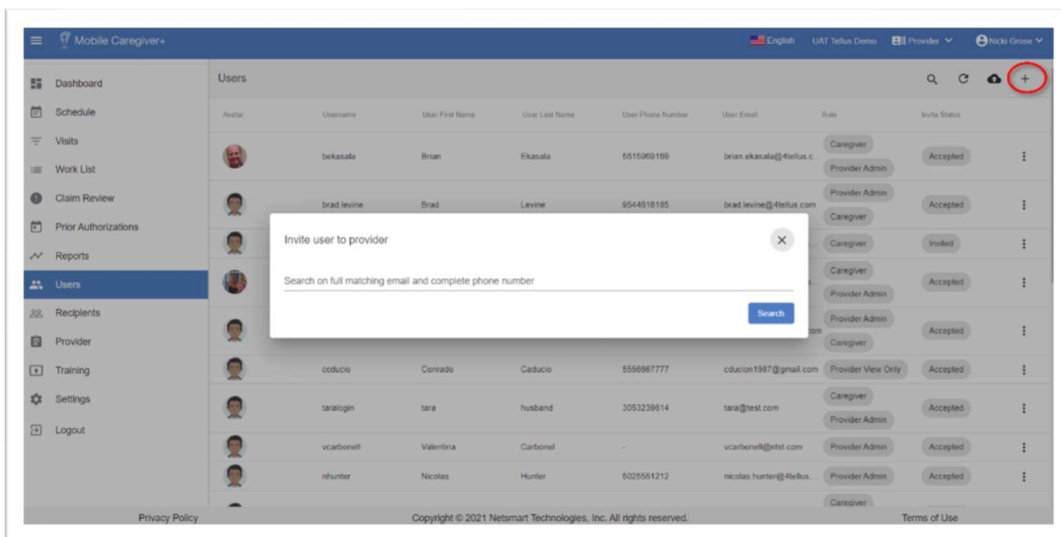
*that has expired, Provider Admins can reset the User's passwords.
Click the **Cancel** button to discard all entries and exit the Invite user to provider form. The new User information will not be saved.*

8.6. Inviting/Linking Users with Existing User Accounts to an Agency

Users should only have one Mobile Caregiver+ User account. A single Mobile Caregiver+ User account can be linked to multiple agencies. Provider Admins can link/add Users with existing accounts by following the instructions below:

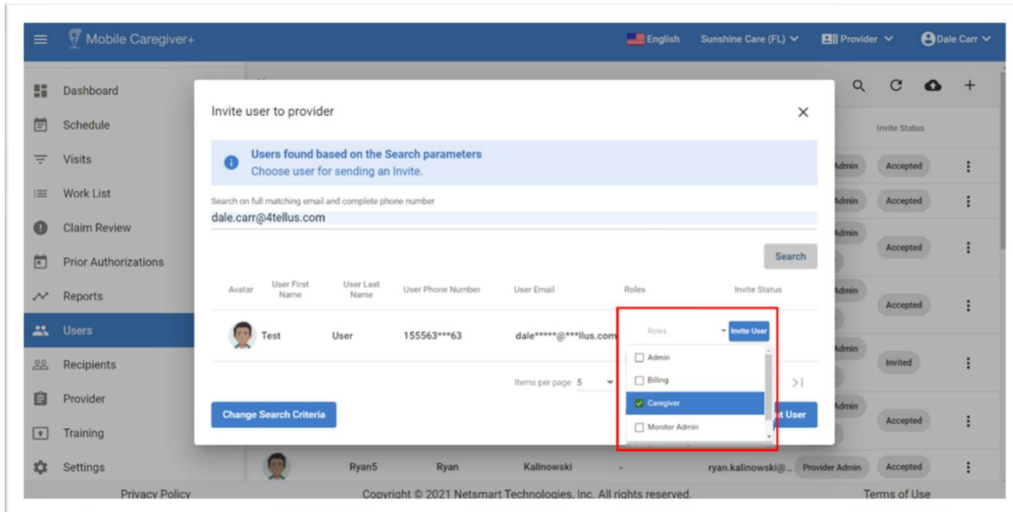
To invite/link existing Mobile Caregiver+ User accounts to other agencies, follow the instructions below.

1. From the Main Menu, click **Users**.



2. Click the **“Add User”** icon (+) in the upper right corner of the screen to open the Invite user to provider dialog box.
3. Enter the User’s email address or phone number in the **Search on full matching email and complete phone number** field.
4. Click the blue **Search** command.

The system will search for and display all existing User accounts with a matching phone number or email address in the User profile.



5. Click in the **Role** field for the User you want to invite to your agency.
6. Choose the User role by clicking on the drop-down list arrow in the **Roles** field.
7. Select the role(s) you want to assign to the User. Users can be assigned one or more roles.
8. Click the blue **Invite User** to link the User to your agency.

Note: 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. Provider Admins can resend a new invitation by resetting the password for the User's Mobile Caregiver+ Account.

8.7. Importing/Adding New Users via CSV File

The Mobile Caregiver+ Solution allows you to upload User (Caregivers) and Recipient information, details as follows.

Note: If you have a smaller number of Users, then you may wish to simply enter them using the screens provided in the EVV Provider Portal. If you have a larger number of each, then you may wish to use file upload. You only need to upload Users who will be overseeing EVV needs for your organization. Users may include administrative staff, scheduling, billing, and the field staff performing EVV visits.

The template that we provide is in comma-separated-value (CSV) format, you can edit it with either Microsoft Excel, Google Sheets, or a notepad application. It is important that you follow the instructions below carefully, and that you do not change any of the fields/columns in the template.

Warning: Please contact Netsmart Client Support to obtain vital instructions and resources.

Note: Each User should only have one Mobile Caregiver+ User account; Users can work for more than one agency using a single account – Do not create/upload new accounts for Users that have existing Mobile Caregiver+ accounts. Users with existing accounts can be invited to Link to other agencies.

To import Users from a CSV file:

1. Contact Netsmart Client Support to obtain a copy of the EVVUsersUploadTemplate.csv file.

Note: Each column in the CSV file has specific rules about what is an acceptable entry, the rules are explained in more detail below.

2. Read the instructions contained in the PDF file.

8.7.1. Completing the New User Spreadsheet

Remember, when you edit this template in Excel or Google Sheets, you must save the file as a CSV file before uploading.

To upload multiple Users via the CSV template, Providers add profile data for all accounts being uploaded to the New User Spreadsheet.

- i. Enter the profile data for all Users being uploaded into the CSV template:

COLUMN A – USERS FIRST NAME

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- FirstName is a mandatory field.
- FirstName allows for letters and spaces only (no numbers or special characters).
- FirstName can be up to 255 characters in length or less.

COLUMN B – USERS LAST NAME

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- LastName is a mandatory field.
- LastName allows for letters and spaces only (no numbers or special characters).
- LastName can be up to 255 characters in length or less.

COLUMN C – USERNAME

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- UserName is a mandatory field.
- UserName allows for letters, numbers, and special characters.
- UserName can be up to 255 characters in length or less.

COLUMN D – EMAIL

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- Email is a conditional field. Either Email or Phone Number must be populated.
- Email must have an “@” and a “.”
- Email can be up to 255 characters in length or less.
- Example: Johndoe12!@gmail.com.

COLUMN E – PHONENUMBER

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- Phone Number is a conditional field. Either Email or Phone Number must be populated.
- Phone Number must contain only numbers.
- Phone Number must be 10 numeric characters in length.

COLUMN F – Users IvrPin

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- IvrPin is an optional field.
- IvrPin allows for numbers only, (no spaces, or special characters).
- IvrPin must be seven (7) numeric characters in length.

COLUMN G – Users MedicaidID

	A	B	C	D	E	F	G
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin	MedicaidID
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897
3							
4							

- MedicaidID is an optional field.
- MedicaidID must be 9 - 13 digits in length, and allows for numbers and letters only, (no spaces, or special characters).
- There should not be any spaces BEFORE the MedicaidID number starts, for example: “123456789” is valid, and “ 123456789” is not valid because there is a space before the “1.”
- If MedicaidID starts with zero, add the letter “M” in front to keep leading Zero. Some applications remove zero after saving as a CSV file, our application will remove the letter “M” after import is successful.

COLUMN H – UserRole

B	C	D	E	F	G	H
LastName	UserName	Email	PhoneNumber	IvrPin	MedicaidID	UserRole
Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897	CARE

- UserRole is mandatory.
- UserRole may only contain the specific 4 letter code for the following:
 - PRAD (Provider Administrator)
 - CARE (Caregiver) *note mobile login only.
 - PMON (Provider Monitor) *note Admin permission with read only access.



COLUMN I – UserStatus

B	C	D	E	F	G	H	I
LastName	UserName	Email	PhoneNumber	IvrPin	MedicaidID	UserRole	UserStatus
Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897	CARE	ACTIVE

- UserStatus is a mandatory field.
- UserStatus may **only** contain one of the following specific values:
 - ACTIVE (Can log in).
 - INACTIVE (Not allowed to log in).

COLUMN J – CaregiverType

C	D	E	F	G	H	I	J
UserName	Email	PhoneNumber	IvrPin	MedicaidID	UserRole	UserStatus	CaregiverType
Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897	CARE	ACTIVE	RNS

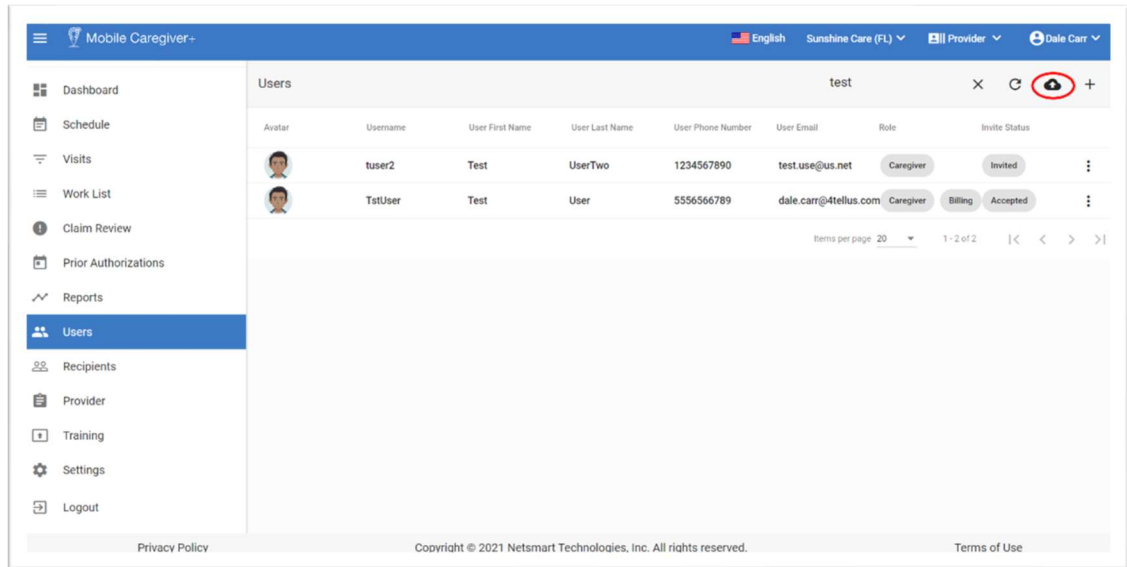
- CaregiverType is a mandatory field.
 - CaregiverType may **only** contain one of the following specific 3-4 letter codes:
 - CNA (Certified Nursing Assistant).
 - LPN (Licensed Practical Nurse).
 - RNS (Registered Nurse).
 - ABA (Assistant Behavior Analyst).
 - RBT (Registered Behavior Technician).
 - LA (Lead Analyst).
 - OTHR (Other).
- ii. Make sure you have deleted the sample row from the Users list you just finished creating.
 - iii. Make sure you have saved the document as a CSV file.




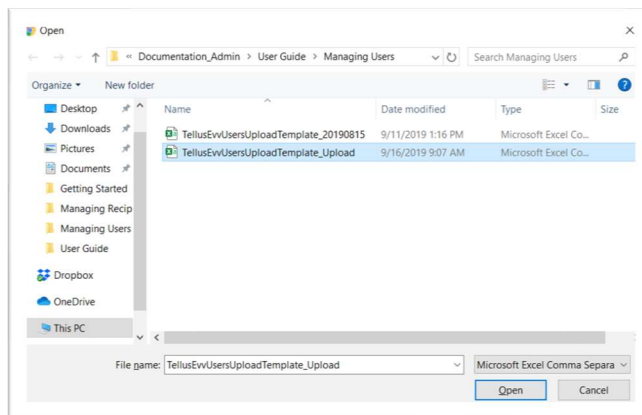
8.7.2. Importing Users From a CSV Template

Now that you have entered the information for your Users in the template, you are ready to load your Users into the Mobile Caregiver+ Provider Portal by following the steps below:

- i. From the Main Menu, click **Users**.



- ii. Click the **Import users from csv-file** icon, , located in the top right corner of the screen. The system will display the Open File Explorer dialog box.



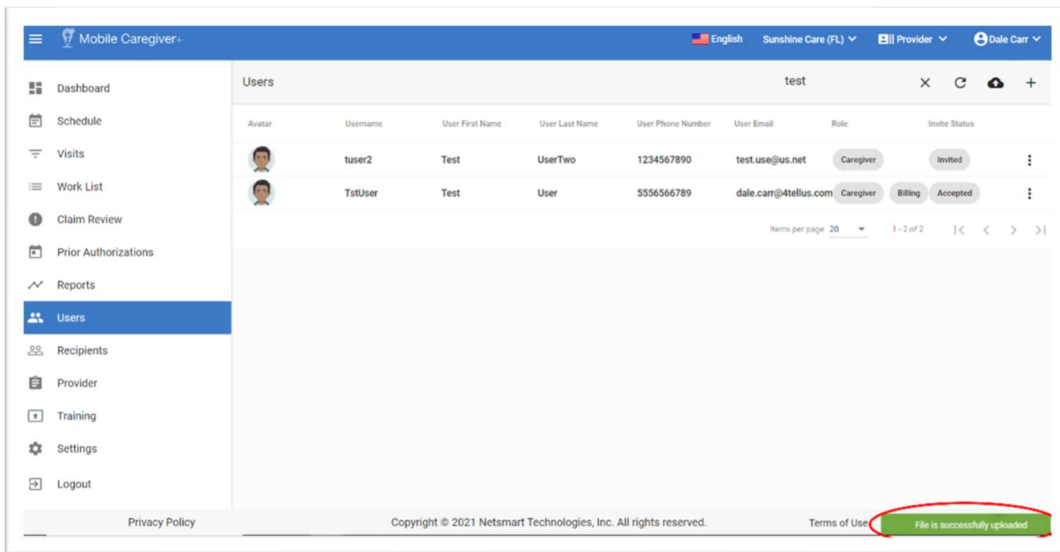
- iii. Locate and click on the CSV file you want to upload.
- iv. Click **Open**.

Import Error

Value at line #1, column #10 is not valid. CaregiverType is a mandatory field. RBT (Registered Behavior Technician), HHA (Home Health Aide), RNS (Registered Nurse), ABA (Assistant Behavior Analyst), LA (Lead Analyst), CNA (Certified Nursing Assistant), LPN (Licensed Practical Nurse), RNS (Registered Nurse), OTHR (Other)

[OK](#)

Note: If the import is successful, a green File successfully uploaded message will display in the lower right corner of the screen.



The screenshot shows the 'Users' management page in the Mobile Caregiver+ portal. The page includes a navigation sidebar on the left with options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users (highlighted), Recipients, Provider, Training, Settings, 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. Two users are listed: 'tuser2' and 'TstUser'. At the bottom right of the page, a green notification bubble states 'File is successfully uploaded'.

If any errors are identified, a message containing the exact row(s) and column(s) of the error will be shown on your screen.

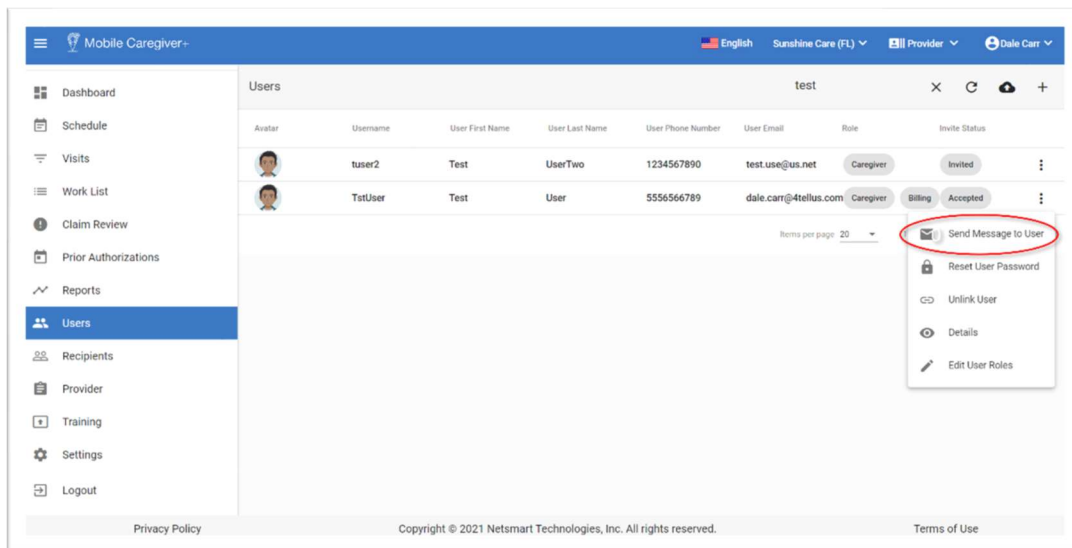
Please refer to the guide above to troubleshoot the exact error(s).

Note: If there are any errors detected by the system, no records from your file will be uploaded; the entire file must be error-free before any User records will be uploaded.

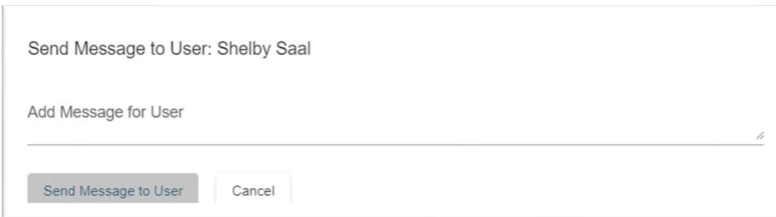
8.8. Sending a Message to a User

The Netsmart EVV Solution allows Providers to send HIPAA compliant text message to Users. Follow the directions below to send text message to Users:

1. From the Main Menu, click **Users**.
2. Locate the User you want to send the message to, then click Actions icon, ⋮, located on the right side of the User's record.
3. From the short-cut submenu, click **Send Message to User**.



4. Type the text message to be sent in the **Add Message for User** field; at least one character must be entered to enable the Send Message to User command.



The screenshot shows a dialog box titled 'Send Message to User: Shelby Saal'. It contains a text input field labeled 'Add Message for User' which is currently empty. Below the input field are two buttons: 'Send Message to User' and 'Cancel'.

5. Click the **Send Message to User** command to send the message.


If you click **Cancel**, the system will return to the Users page and the message will not be sent.

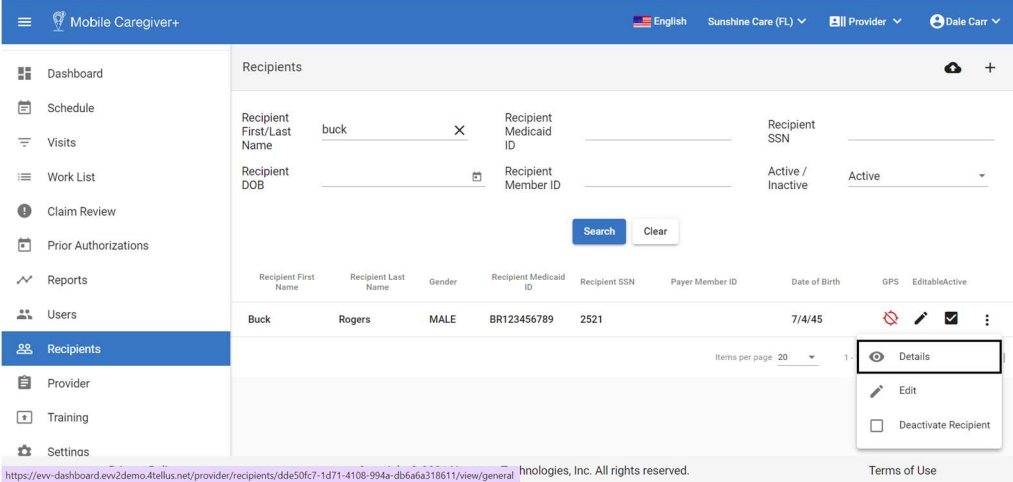
Note: Users assigned the Caregiver role will receive messages on their Mobile Caregiver+ app.

8.9. Messaging Users from the Recipient Linked Users Tab

The Mobile Caregiver+ Provider Portal allows Provider Admins to send HIPAA compliant messages to Caregivers from the Linked Users tab, located in a Recipient’s profile.

8.9.1. Unicast – Texting Individual Linked Caregiver

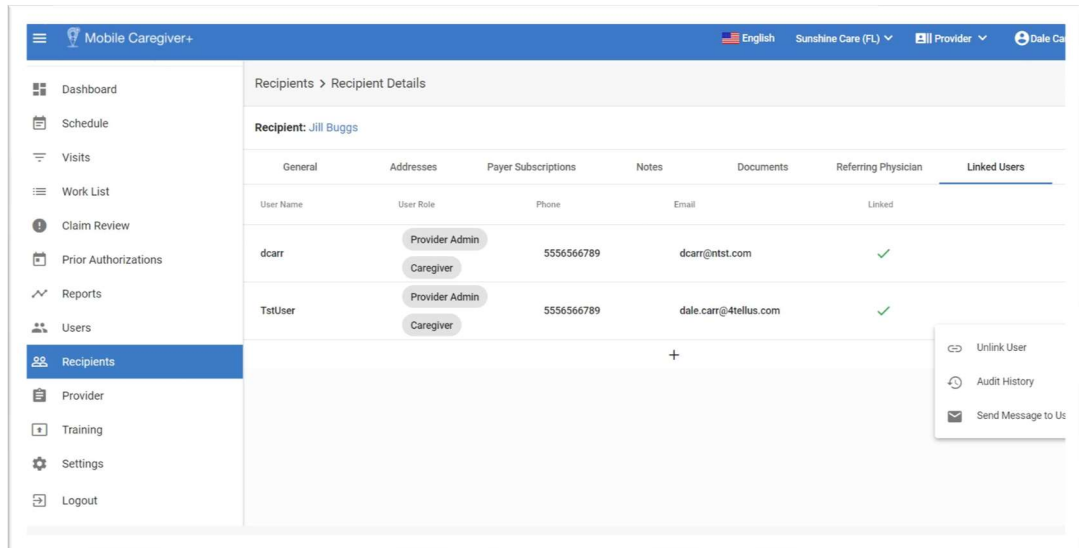
- i. From the Main Menu, click **Recipients**.
- ii. From the Recipients screen, locate and click on the Actions icon, , for a Recipient that is linked to the Caregiver you want to message.
- iii. From the shortcut submenu, click **Details**.



The screenshot displays the 'Recipients' management interface. On the left is a navigation menu with 'Recipients' selected. The main area features a search form and a data table. The search form includes fields for 'Recipient First/Last Name' (containing 'buck'), 'Recipient Medicaid ID', 'Recipient SSN', 'Recipient DOB', and 'Recipient Member ID', along with 'Search' and 'Clear' buttons. The table below has columns for recipient details and actions. A dropdown menu is open over the 'Edit' icon for the first recipient, showing options for 'Details', 'Edit', and 'Deactivate Recipient'.

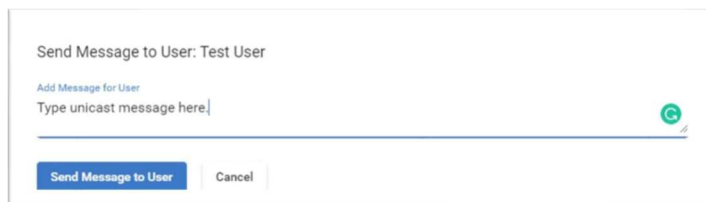


- iv. From the Recipient Details screen, click on the **Linked Users** tab.



Note: The system will display the Linked Users table with a list of all Users that have been linked to the selected Recipient.


- The Linked status field will display the Linked icon, ✓, if the Recipient has a current-active link to the User.
 - The Linked status field will display the Unlinked icon, ✗, if the User is not currently, but was previously, linked to the selected **Recipient**.
 - Click the **Message** icon, ✉, located in the top-right corner of the screen, to send a message to one or more linked Caregiver(s).
- v. From the Linked Users table, click the Actions icon, ⋮, located to the right of the Caregiver's record.
- vi. From the short-cut submenu, click **Send Message to User** (✉ Send Message to User) command. The system will display the Send Message to User dialog box.

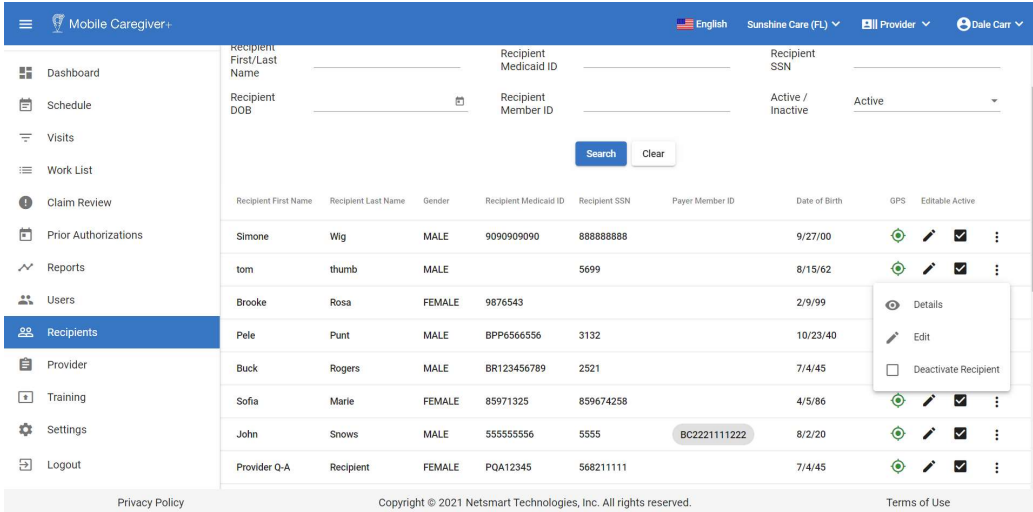


- vii. Type the text message to be sent in the **Add Message for User** field; at least one character must be entered to enable the Send Message to User command.

viii. Click the blue **Send Message to User** command to send the message.

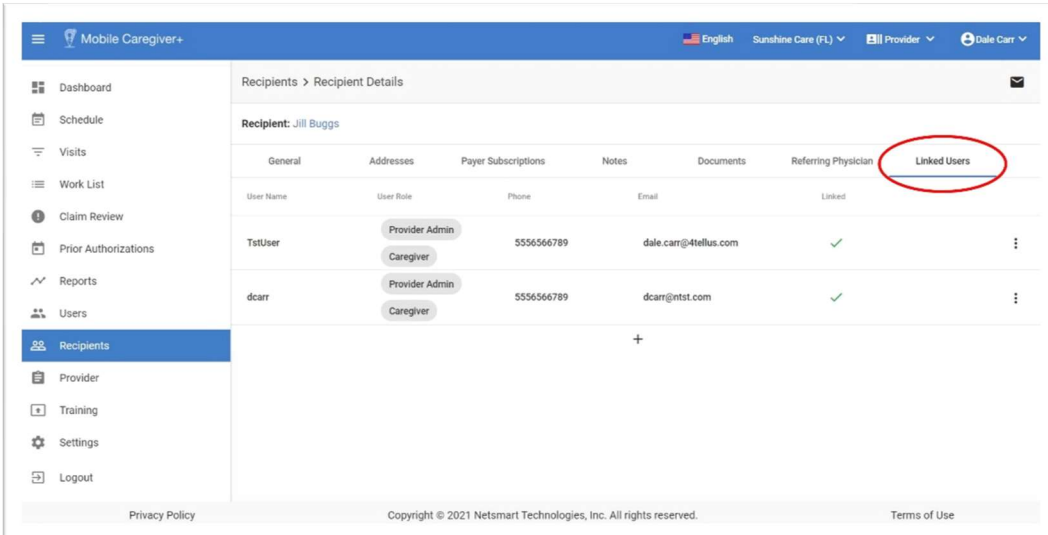
8.9.2. Multicast – Texting Multiple Linked Caregivers

- i. From the Main Menu, click **Recipients**.
- ii. From the Recipients screen, locate and click on the Actions icon, , for a Recipient that is linked to the Caregiver you want to message.
- iii. From the shortcut submenu, click **Details**.



Recipient First Name	Recipient Last Name	Gender	Recipient Medicaid ID	Recipient SSN	Payer Member ID	Date of Birth	GPS	Editable	Active
Simone	Wig	MALE	9090909090	888888888		9/27/00			<input checked="" type="checkbox"/>
tom	thumb	MALE		5699		8/15/62			<input checked="" type="checkbox"/>
Brooke	Rosa	FEMALE	9876543			2/9/99			<input checked="" type="checkbox"/>
Pele	Punt	MALE	BPP6566556	3132		10/23/40			<input checked="" type="checkbox"/>
Buck	Rogers	MALE	BR123456789	2521		7/4/45			<input checked="" type="checkbox"/>
Sofia	Marie	FEMALE	85971325	859674258		4/5/86			<input checked="" type="checkbox"/>
John	Snows	MALE	555555556	5555	BC2221111222	8/2/20			<input checked="" type="checkbox"/>
Provider Q-A	Recipient	FEMALE	PQA12345	568211111		7/4/45			<input checked="" type="checkbox"/>

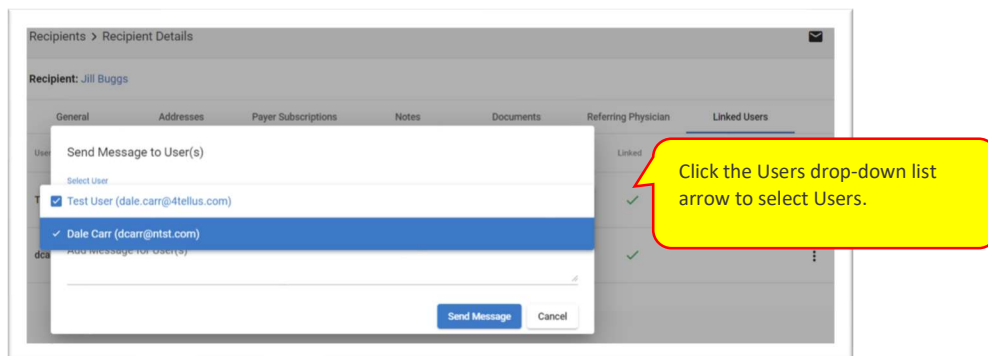
iv. Click on the **Linked Users** tab.



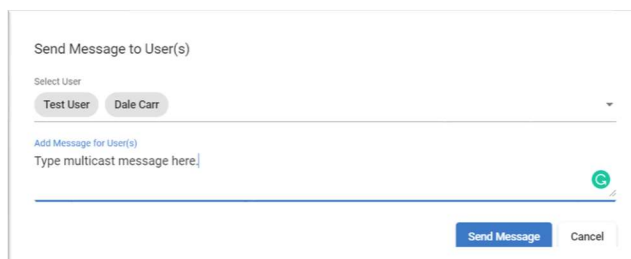
User Name	User Role	Phone	Email	Linked
TstUser	Provider Admin	5556566789	dale.carr@4tellus.com	<input checked="" type="checkbox"/>
dcarr	Provider Admin	5556566789	dcarr@ntst.com	<input checked="" type="checkbox"/>
	Caregiver			
	Caregiver			



- v. The system will display the Linked Users table with a list of all Users that have been linked to the selected Recipient.
 - The Linked status field will display the Linked icon, ✓, if the Recipient has a current-active link to the User.
 - The Linked status field will display the Unlinked icon, ✗, indicating that the User is not currently, but was previously, linked to the selected Recipient.
 - Click the Message icon, ✉, located in the top-right corner of the screen, to send a message to one or more linked Caregiver(s) (please view [Texting Multiple Users](#)).
- vi. From the Linked User screen, click the **Message** icon, ✉, located top right corner of the screen.
- vii. The system will display the Send Message to User dialog box.




- viii. Click in the **Select Users** field to view and select one or more Users that are linked to the Recipient. Users will be able to select multiple Users; at least one User must be selected.

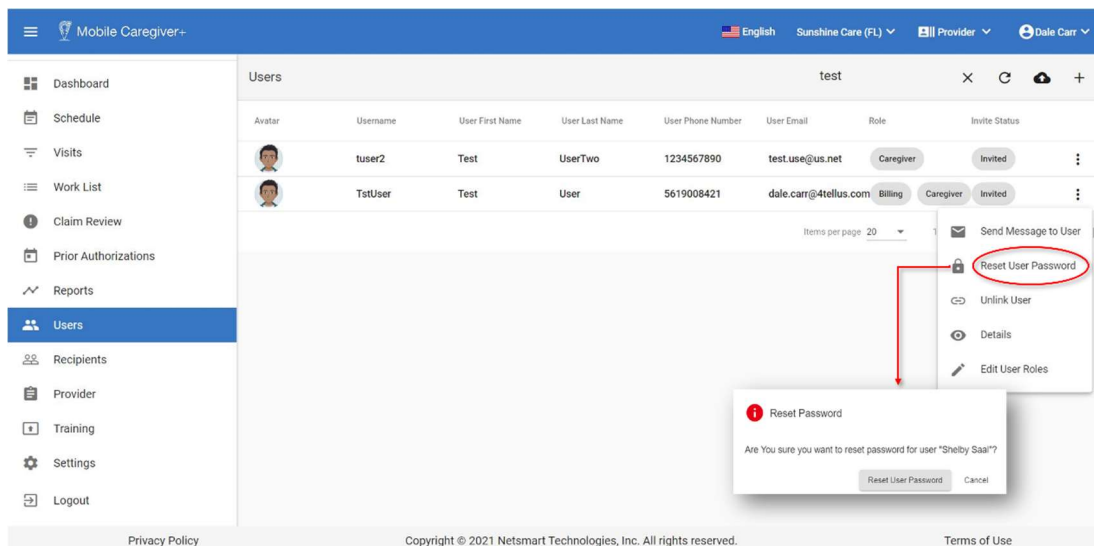


- ix. Type the text message to be sent in the **Add Message for User** field; at least one character must be entered to enable the Send Message command.
- x. Click the blue **Send Message** command to send the message to the selected Caregiver(s).

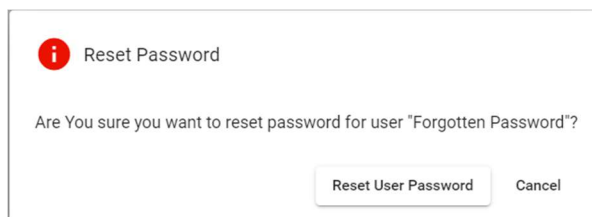
8.10. Resetting User Password

To prevent passwords from expiring, Provider Administrators can proactively reset their own password as well as any User's by following the steps below:

1. From the Main Menu, click **Users**.
2. Find the User whose password you want to reset.
3. Click the Actions icon, , located to the right of the User's record.
4. From the short-cut submenu, click **Reset password**.



5. From the Reset Password confirmation dialog box, click **Reset Password**.



The system will email a temporary password to the User. The next time the User attempts to log in, they will be prompted to change the temporary password. The system will return to the Users List.

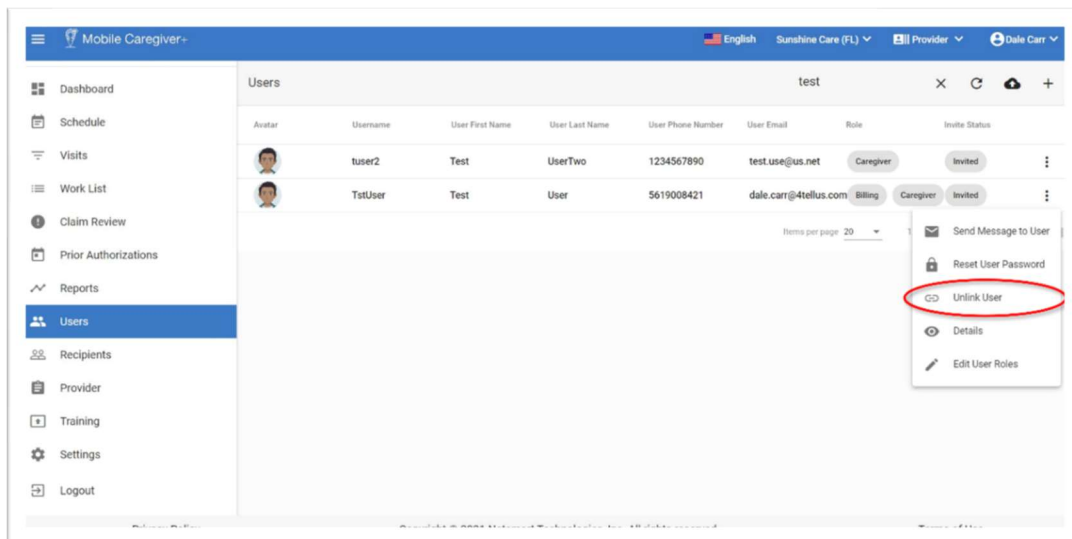
8.11. Unlinking Users from an Agency and Reassigning Tasks

Unlinking a User from an agency revokes the User's access to the agency. Providers should unlink all Users who are no longer a part of their agencies.

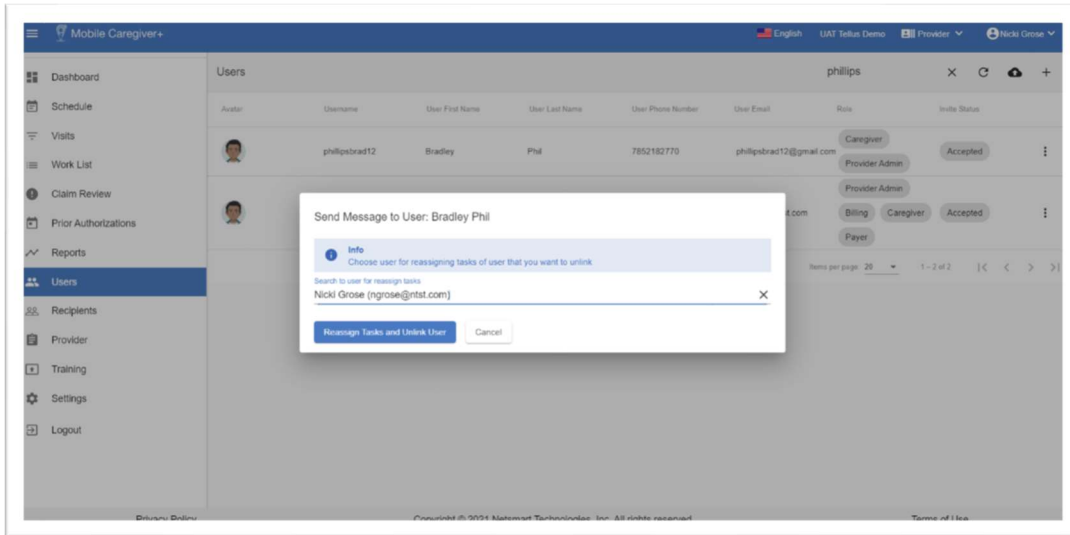
Note: Provider Admins cannot unlink themselves; unlinking a User with the Provider Admin role must be done by a different Administrator.

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

1. From the Main Menu, click **Users**.



2. Find the User you want to unlink and click the Actions icon, ⋮, located to the right of the User's record.
3. From the short-cut submenu, click **Unlink User**.



4. From the Send Message to User dialog box, start typing the Username or email address to find the User that the unlinked User's tasks will be reassigned to.
Note: Providers must choose a User to whom the selected User's tasks will be reassigned; the system will reassign all scheduled visits to the chosen User.
5. Click **Reassign Tasks and Unlink User**. That User will be unlinked from the agency. Click **Cancel** to exit without unlinking the User from the agency; the system will return to the Users screen.

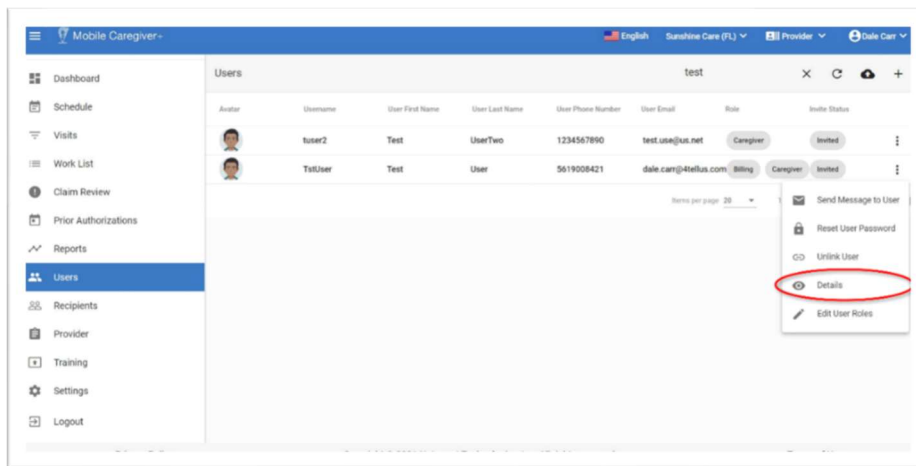
8.12. Updating User Profile Details

Provider Admins can update Users profiles from the Users screen.

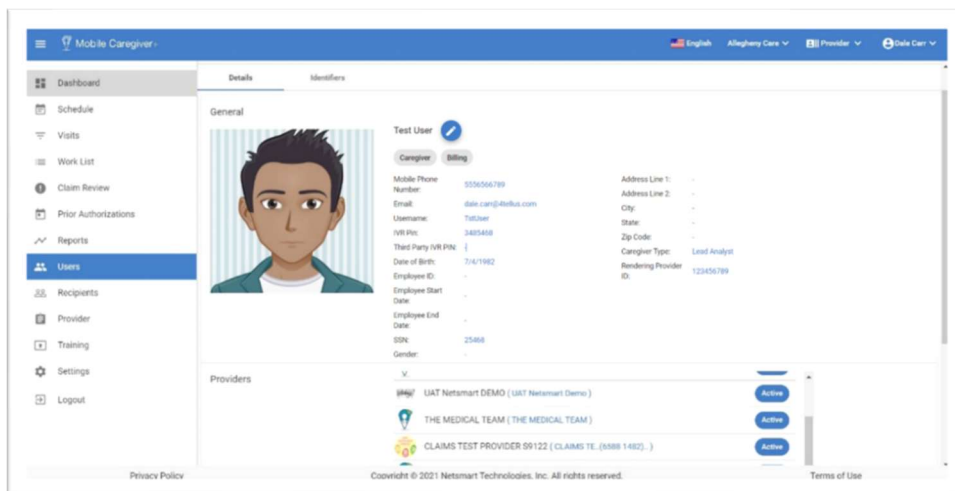
Note: Provider Admins have limited access rights to update profile details for Users that are linked to multiple agencies; Users that are linked to multiple agencies should update their own profile via the Mobile Caregiver+ Mobile Application.

The instructions below are for updating User profile details from the Provider Portal:

1. From the Main Menu, click **Users**.
2. Find the User whose profile you want to update, then click the Actions icon, ⋮, located to the right of the User's record.
3. From the short-cut submenu, click **Details**.



4. From the User Details screen, click the edit icon, ✎.



5. Make any necessary changes to the User's profile.

Edit User


Enter First Name *	Enter Last Name *
Shelby	Saal
Enter Phone Number	Enter Email
	ssaal@ntst.com
Enter Caregiver Type *	Date of Birth
Other	<input type="text"/>
Enter Rendering Provider ID	Enter SSN
<input type="text"/>	<input type="text"/>
Roles *	Enter Employee ID
Admin	<input type="text"/>
Employee Effective Start Date	Employee Effective End Date
<input type="text"/>	<input type="text"/>
Enter Address Line 1	Enter Address Line 2
<input type="text"/>	<input type="text"/>

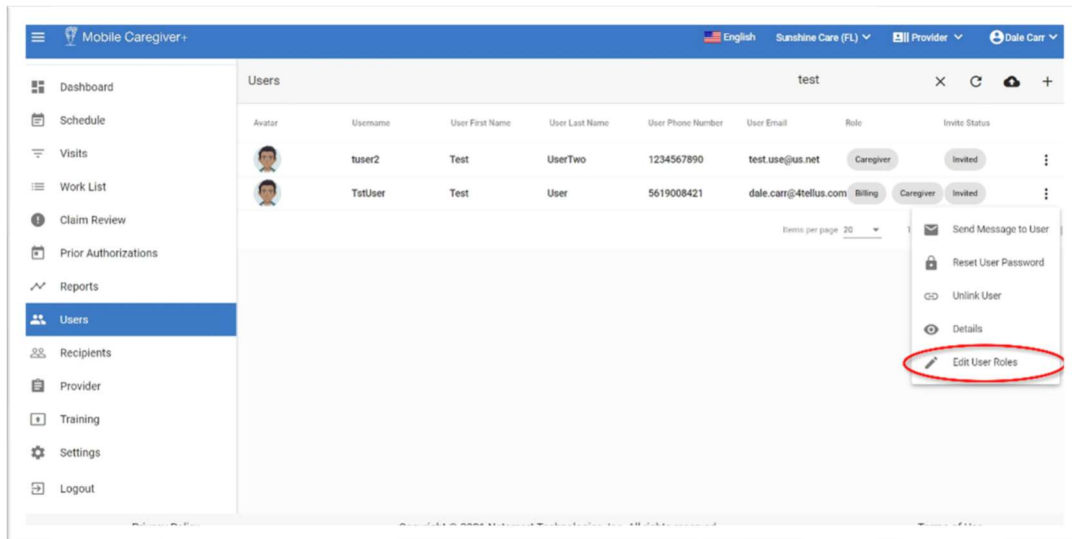
6. Click the blue **Update** command to save any changes.



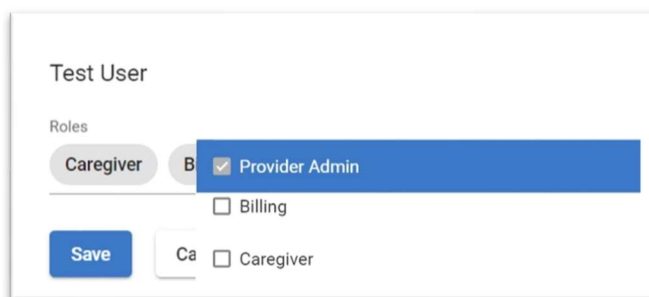
8.13. Editing User Roles

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

1. From the Main Menu, click **Users**.
2. Find the User whose role(s) you want to update, then click the Actions icon, , located to the right of the User's record.
3. From the shortcut submenu, click **Edit User Roles**.



4. From the User Roles dialog box, click in the **Roles** field and edit the User's role(s); multiple roles can be assigned to a single User account. Place a checkmark in the checkbox for each role you want to assign to the User.



5. Click the blue **Save** command to save the changes.

*Note: Click **Cancel** to exit the User Roles dialog box without saving the changes; the system will return to the Users List.*



9. Managing Recipients

- Searching for and Viewing Recipients
- Changing the Number of Recipients Displayed Per Page
- Searching for a Specific Recipient
- Manually Adding Recipients to the Mobile Caregiver+ Provider Portal
- Entering Recipient Information
- Entering Emergency Contact Information
- Entering a Recipient Address
- Entering Payer Subscription Information
- Linking Recipients with Existing MCG+ Profiles to an Agency
- Importing Recipients From a CSV-File
- Entering Recipient Profile Data
- Importing Recipient Into the Mobile Caregiver+ Portal
- Linking Caregivers to Recipients from the Linked Users Tab
- Unlinking Caregivers from Recipients via the Linked Users Tab
- Relinking Caregivers to Recipients via the Linked Users Tab
- Reviewing Caregivers Link Audit History
- Viewing Designee Information
- Editing a Recipient's MCG+ Profile Data
- Editing a Recipient's General Profile Data
- Adding a New Service Address to a Recipient's Mobile Caregiver+ profile
- Updating a Recipient's Service Address
- Switching a Recipient's Primary Service Address
- Deactivating a Service Address from a Recipient's Mobile Caregiver+ Profile
- Adding New Payer Subscriptions
- Adding Programs/Plans to Existing Payer Subscriptions
- Editing Existing Payer Subscriptions
- Updating a Recipient's Recipient Diagnosis Code(s)
- Viewing a Recipient's Voided Diagnosis Codes
- Deactivating a Recipient's Payer Subscription
- Reactivating a Recipient's Payer Subscription
- Adding Notes to Recipients' MCG+ Profile
- Viewing Notes in a Recipient's MCG+ Profile
- Adding Documents to a Recipient's MCG+ Profile
- Managing Documents in a Recipient's MCG+ Profile



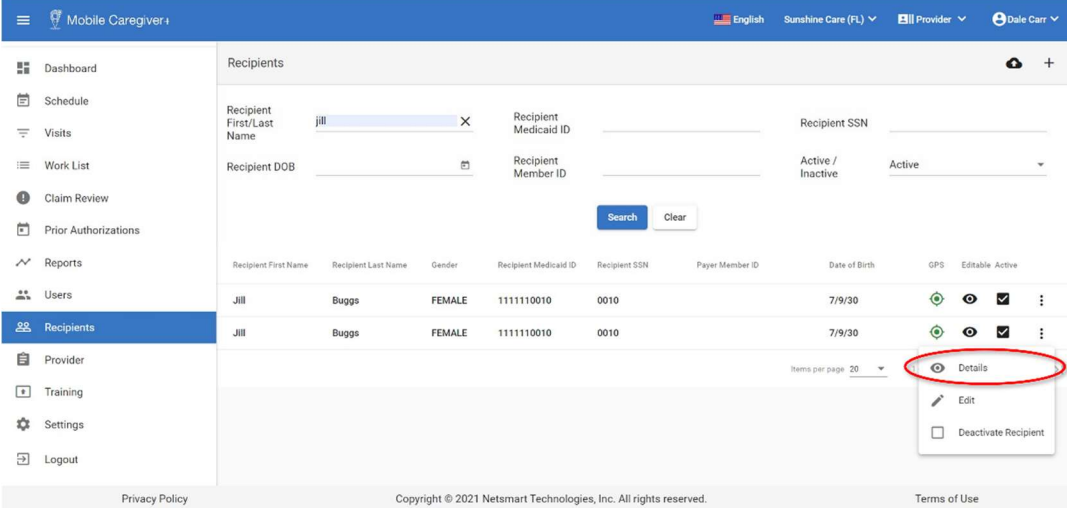
Adding a New Referring Physician to a Recipient's MCG+ Profile
Linking a Recipient to an Existing MCG+ Referring Physician Profile
Deactivating a Recipient's MCG+ Profile
Activating an Inactive Recipient's MCG+ Profile



9.1. Searching for and Viewing Recipients

To locate and view Recipients' Mobile Caregiver+ profile data:

1. From the Main Menu, click **Recipients**.
2. From the shortcut submenu, click **Details**.



The screenshot shows the 'Recipients' page in the Mobile Caregiver+ portal. The top navigation bar includes 'Mobile Caregiver+', language settings (English), location (Sunshine Care (FL)), provider selection, and date carrier. A left sidebar contains a main menu with options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients (highlighted), Provider, Training, Settings, and Logout. The main content area features a search form with fields for Recipient First/Last Name (jill), Recipient DOB, Recipient Medicaid ID, Recipient SSN, and an Active/Inactive dropdown. Below the search form is a table with columns: Recipient First Name, Recipient Last Name, Gender, Recipient Medicaid ID, Recipient SSN, Payer Member ID, Date of Birth, GPS, Editable, and Active. Two rows of recipient data are shown. A red circle highlights the 'Details' button in the actions column of the second row.

The Recipients List opens and displays the following information for all Recipients:

- First name
- Last name
- Gender
- Date of birth
- Actions icon, ⋮ - click on the Actions icon to access the following submenu options:
 - The **Edit** icon, ✎, indicates that the Recipient's profile details can be edited.
 - The **read-only icon**, 👁, indicates that the Recipients was uploaded by a Payer; Provider Admins will have limited access rights to edit a Recipient's profile i.e., adding additional address, managing emergency contact, managing diagnosis codes, etc.
 - **Active:** A checkmark in the checkbox indicates that the Recipient is currently enrolled with and is actively receiving services from the Provider Agency.

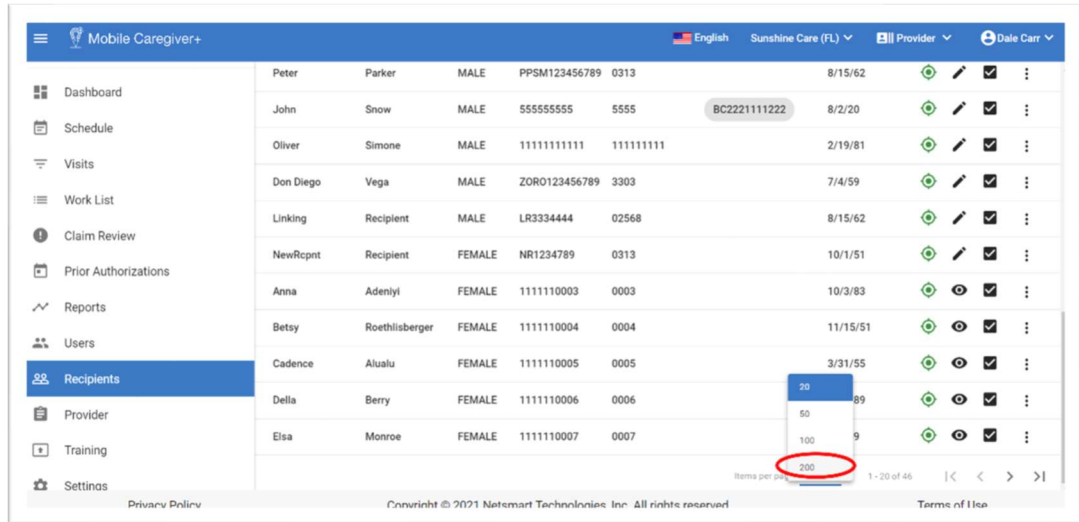
Note: The Recipients List can be sorted by clicking on any of the list header label, i.e., Recipient First Name, Recipient Last Name, Gender, or Date of Birth; click the same column title again to reverse the order.

3. Click the Actions icon, ⋮, located to the right of the Recipient's record, to see a shortcut submenu list of management options, i.e., Details, Edit, and Deactivate Recipient.

9.1.1. Changing the Number of Recipients Displayed Per Page

To change the number of Recipient records that are displayed on each page:

- i. From the Main Menu, click **Recipients**.



- ii. Scroll to the bottom of the page and click on **Items per page**.
- iii. Select the number of records to be displayed on each page.
- iv. Click the **Items per page** drop-down arrow and select: 20, 50 or 100 Recipients per page.

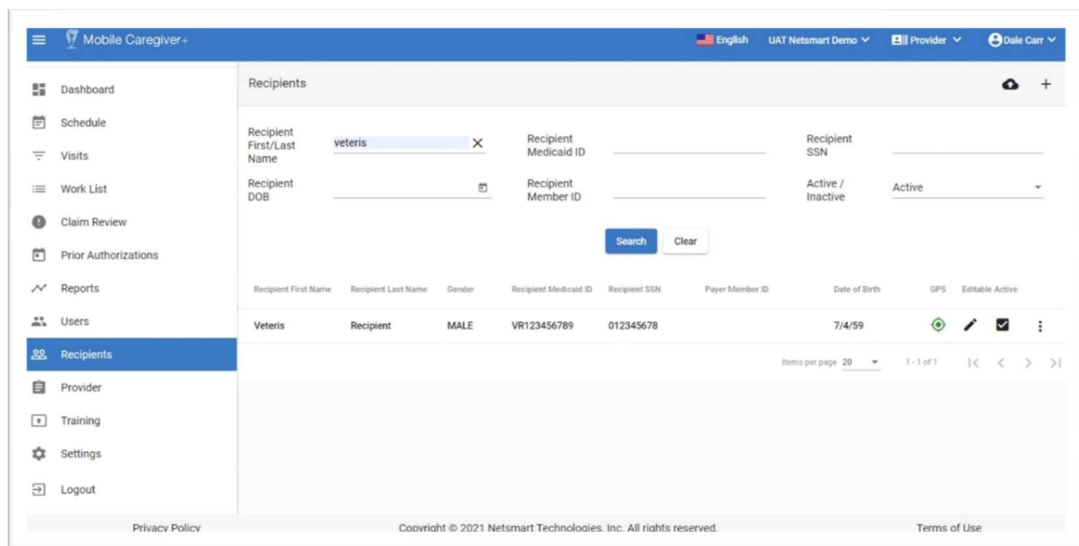
If the total number of Recipients exceeds the amount that can be displayed on one page, you can view additional Recipients by using the scroll arrows located at the bottom of the screen.

9.1.2. Searching for a Specific Recipient

The Mobile Caregiver+ System allows Providers to manage the Recipients List by using the fields located in the header. Providers can filter the list by entering search criteria in one or more of the fields located in the header; Providers can enter data values in multiple fields to further narrow their search results.

To manage the Recipients List:


- i. From the Main Menu, click **Recipients**.



- ii. Enter partial or complete data values in one or more data fields located in the header – **Recipient Name/Last Name, Recipient Medicaid ID, Recipient DOB, Recipient Member ID, and/or Active/Inactive.**
- iii. Click the blue **Search** command to see a list of Recipients that match the search parameter(s).
Click “X” in any field to clear the search parameter.

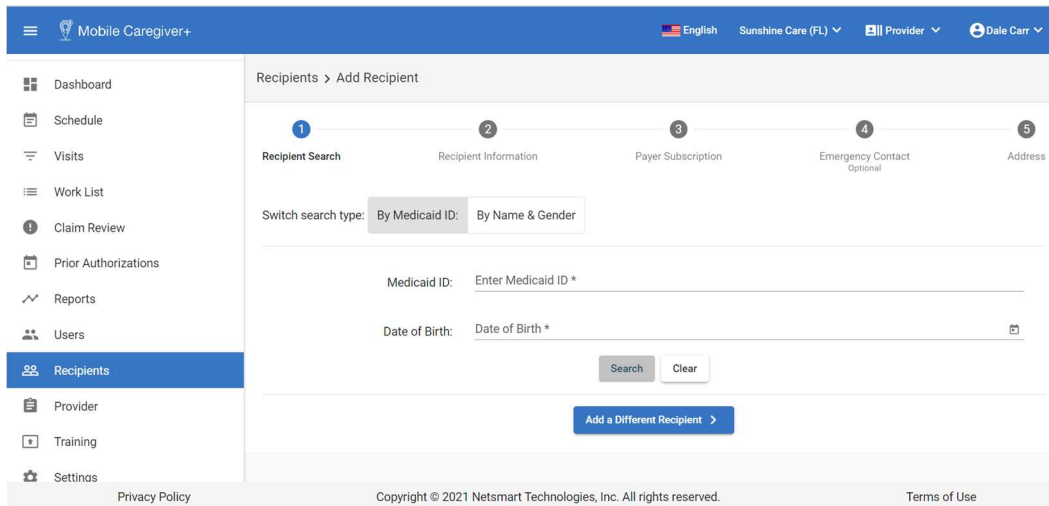
Note: The Active/Inactive field defaults to “Active.” Providers must select Inactive to view inactive Recipients, or All to see both active and inactive Users. See [Deactivating a Recipient](#) and [Activating an Inactive Recipient](#) for more information.

9.2. Manually Adding Recipients to the Mobile Caregiver+ Provider Portal

Depending on the Payers and programs Recipients are enrolled in, some Payers will automatically load Recipients' profile data into the Mobile Caregiver+ System, while some Providers may be allowed to add Recipients to their Mobile Caregiver+ Provider Portal. For Providers that are allowed to add Recipients to the Mobile Caregiver+ Portal, the system will display the Add Recipient command, **+**, located in the upper right of the screen, and/or the Import recipients from csv-file command, .

To manually add a Recipient to an agency:

1. From the Main Menu, click **Recipients**.
2. Click the **Add Recipient** command, **+**, located in the upper right of the screen. The system will display the Add Recipient form.

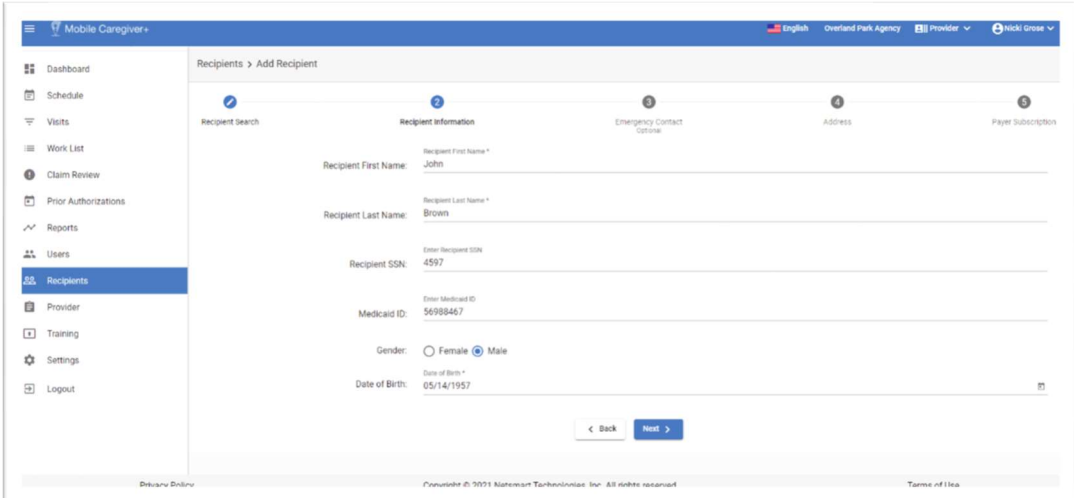


The screenshot shows the 'Add Recipient' form in the Mobile Caregiver+ Provider Portal. The form is titled 'Recipients > Add Recipient' and features a progress bar with five steps: 1. Recipient Search, 2. Recipient Information, 3. Payer Subscription, 4. Emergency Contact (Optional), and 5. Address. The 'Recipients' menu item is highlighted in the left sidebar. The form includes a search type selector with 'By Medicaid ID' selected and 'By Name & Gender' as an alternative. Below this are input fields for 'Medicaid ID: Enter Medicaid ID *' and 'Date of Birth: Date of Birth *'. There are 'Search' and 'Clear' buttons, and a blue 'Add a Different Recipient >' button at the bottom. The footer contains 'Privacy Policy', 'Copyright © 2021 Netsmart Technologies, Inc. All rights reserved.', and 'Terms of Use'.

3. Click the blue **Add a different Recipient** command. The system will display the Add Recipient form.

9.2.1. Entering Recipient Information

4. Enter the Recipient's information. All fields that display an asterisk, *, are mandatory. You must enter information in the mandatory fields. Follow the directions below to fill in the Recipient's Mobile Caregiver+ EVV profile data in tabs two through five of the Add Recipient form.
 - i. **Recipient First name***: Enter the new Recipient's first name.
 - ii. **Recipient Last name***: Enter the new Recipient's last name.
 - iii. **SSN (Last 4)**: Enter the last 4 digits of the new Recipient's social security number.
 - iv. **Gender**: Select the gender using the radio buttons. The default selection is male.
 - v. **Date of Birth***: Enter the Recipient's date of birth by typing the date or clicking and selecting a date from the calendar.

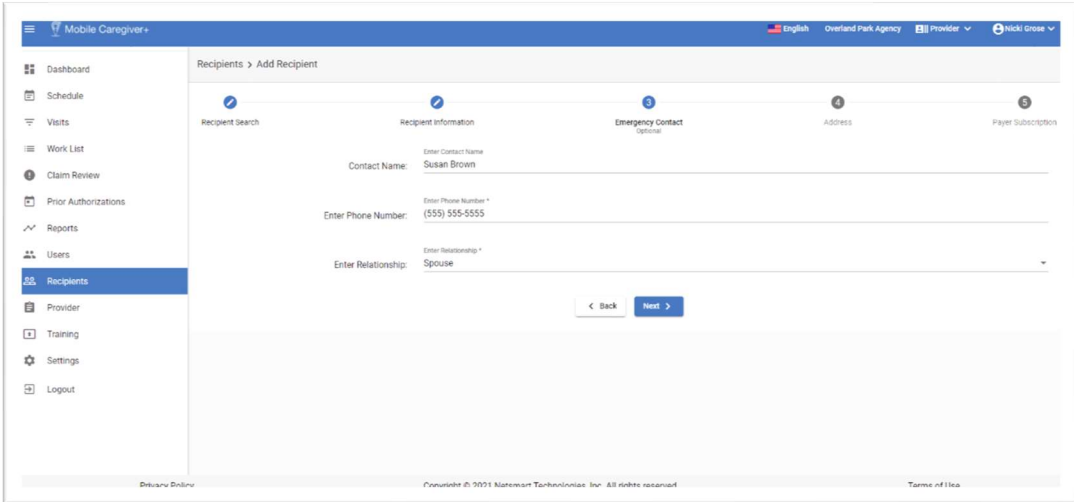


5. Click **Next**. The system will display the Emergency Contact Information tab (the third of five tabs).

Note: Clicking Next does not save your entries. You will save on the last tab, 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.

9.2.2. Entering Emergency Contact Information

6. You have the option to enter the Recipient's Emergency Contact information.
 - i. **Contact Name:** Enter the Emergency Contact's Name.
 - ii. **Enter Phone Number:** Enter the Emergency Contact's Phone Number.
 - iii. **Enter Relationship:** Use the drop-down list to select the Emergency Contact's relationship to the Recipient. Choose **None, Child, Friend, Other, Parent, Sibling, Spouse, or Unknown.**



The screenshot shows the 'Add Recipient' form in the Mobile Caregiver+ system. The form is divided into five tabs: Recipient Search, Recipient Information, Emergency Contact (active), Address, and Payer Subscription. The 'Emergency Contact' tab contains the following fields:

- Contact Name:** Enter Contact Name: Susan Brown
- Enter Phone Number:** Enter Phone Number: (555) 555-5555
- Enter Relationship:** Enter Relationship: Spouse (selected from a dropdown menu)

Navigation buttons for '< Back' and 'Next >' are located at the bottom of the form. The footer of the page includes '© 2021 Marwan Technologies, Inc. All rights reserved.' and 'Terms of Use'.

7. Click **Next** to display the Address tab (the fourth of five tabs).

Note: You can select one or more addresses from the list of addresses in a Recipient's Mobile Caregiver+ profile when scheduling visits.



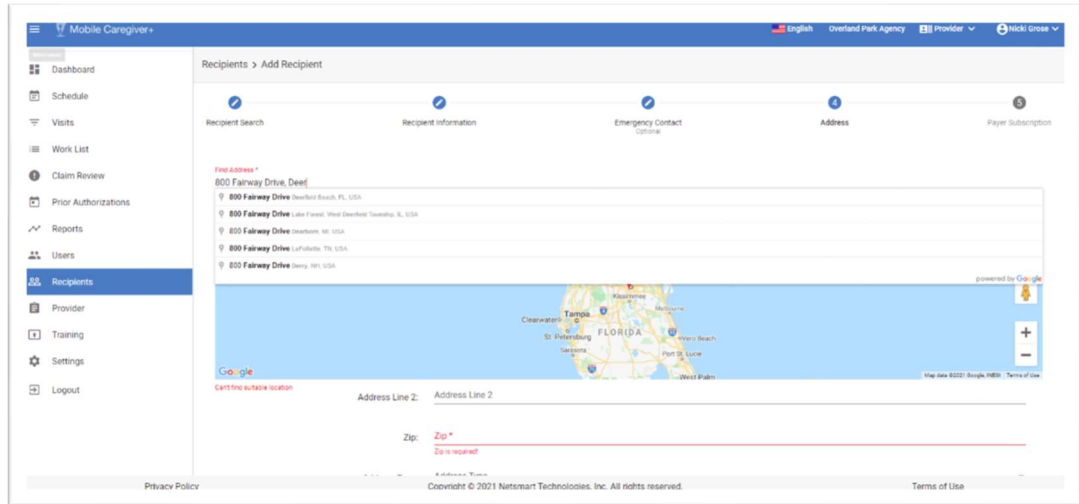
9.2.3. Entering a Recipient Address

Providers are required to enter validated addresses into the Mobile Caregiver+ Provider Portal.

8. Enter one or more addresses for the Recipients.
 - i. **Find Address:** To add new addresses to the Mobile Caregiver+ Provider Portal, Providers must type the Recipient's address in the Find Address field. The system will display a list of matching validated Google Maps validated addresses.
 - ii. Select the correct address from the list. The system will automatically fill in the city, state, and zip code.

Note: If the address you are entering is not found in Google Maps, 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 Northeast or vice versa, or Lakepoint as Lake Point or vice versa.

- iii. **Address Type:** Some Payers may require that certain services be performed at designated locations (places of service). Click in the Address Type field to select the appropriate type of service location.
- iv. **Primary Phone:** Enter the Recipient's Primary Phone number. You are required to enter the Recipients phone number.
- v. **Set Address As Primary:** Click on the switch to set the address as the Recipient's default address; the Recipient's Primary Address will automatically be loaded into the address fields when scheduling visits.
- vi. Click the **Save** command to add the new service address to the Recipient's Address List.



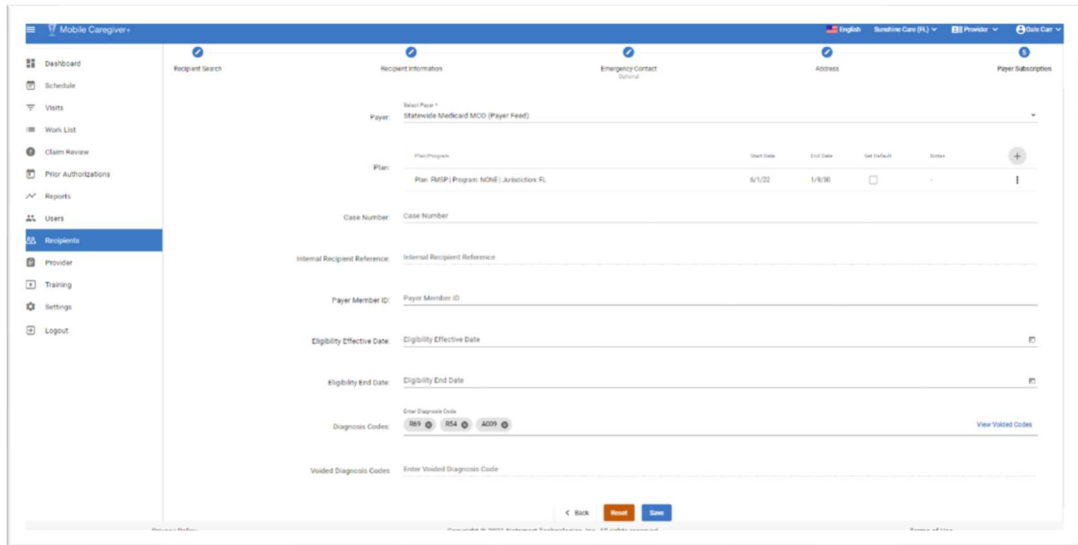
9. Click **Next**. The system will display the Payer Subscription tab (the fifth of five tabs).



9.2.4. Entering Payer Subscription Information

10. Enter Payer Subscription information:

- i. **Payer***: Select the Payer from the drop-down list.
- ii. **Plan**: Click the Add New Plan icon, + , to select the Recipient’s Plan name, Program name and Jurisdiction.
- iii. **Case Number**: Enter the case number.
- iv. **Member ID**: Enter the Member’s ID.
- v. **Eligibility Effective Date**: Enter the date that eligibility became effective.
- vi. **Eligibility End Date**: Enter the date that eligibility ends.
- vii. **Authorization Effective Date**: Enter the date that the prior authorization becomes effective.
- viii. **Authorization End Date**: Enter the date that the prior authorization expires.
- ix. **Diagnosis Code***: Provider must enter at least one diagnosis code.



*Note: The system will retain the billing sequence of Recipients’ Diagnosis Codes as displayed in the Recipient’s Mobile Caregiver+ profile; Recipients’ Diagnosis Codes will be populated into rendered service records in the same order as they appear in the Recipient’s Mobile Caregiver+ profile.****


11. Click the **Save** command to add the Recipient to the Mobile Caregiver+ Provider Portal; the system will automatically link the Recipient to the agency.

*Note: At this point, you can also choose to click the **Back** command to go back and review or edit data on the previous tabs.*

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

If the Recipient requires a Referring Physician, please review [Editing a Recipient](#) and/or [Entering a Referring Physician](#).

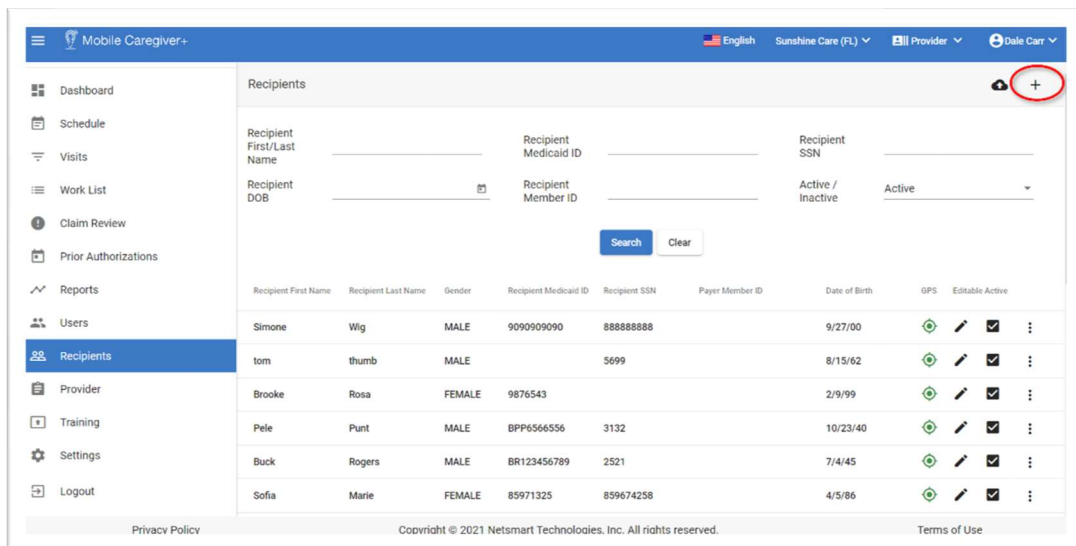
9.3. Linking Recipients with Existing MCG+ Profiles to an Agency

Recipients are the individuals who will receive services from Caregivers. Depending on the Payers and programs Recipients are enrolled in, some Payers will automatically load Recipients' profile data into the Mobile Caregiver+ System, while some Providers may be allowed to add Recipients to their Mobile Caregiver+ Provider Portal. For Providers that are allowed to add Recipients to the Mobile Caregiver+ Portal, the system will display the Add Recipient command, **+**, located in the upper right of the screen, and/or the Import recipients from csv-file command, .

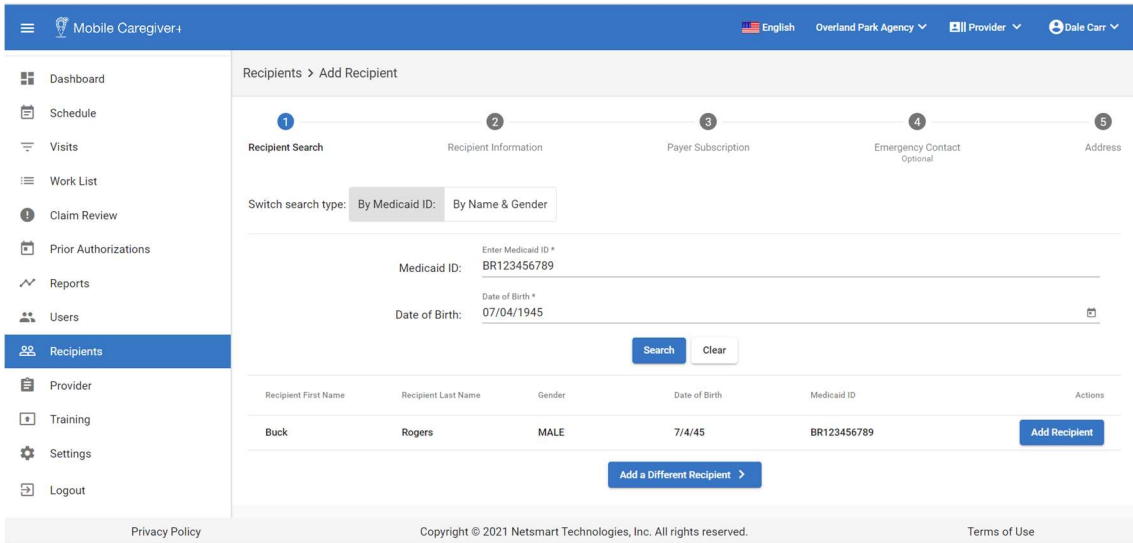
Some Recipients may already have existing Mobile Caregiver+ profiles; they might have previously received services from Providers that use the Mobile Caregiver+ System. Recipients that have existing Mobile Caregiver+ Recipient profiles can simply be linked to other agencies.

To link a Recipient to an agency:

1. From the Main Menu, click **Recipients**.
2. Click the **Add Recipient** command, **+**, located in the upper right of the screen. The system will display the Add Recipient form.



3. Enter the Recipient's Medicaid ID.
4. Enter the Recipient's date of birth.
5. Click the blue **Search** command. The system will display any existing Mobile Caregiver+ Recipient record.



Recipients > Add Recipient

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

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

Medicaid ID: Enter Medicaid ID *

Date of Birth: Date of Birth *


Recipient First Name	Recipient Last Name	Gender	Date of Birth	Medicaid ID	Actions
Buck	Rogers	MALE	7/4/45	BR123456789	<input type="button" value="Add Recipient"/>

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6. Click the blue **Add Recipient** command located to the right of the existing record. The Recipient will be linked to the current agency.

*Note: If the Recipient does not have an existing Mobile Caregiver+ Recipient account, click the blue **Add a Different Recipient** command to manually add the Recipient. Instructions follow for [“Manually Adding Recipients to the Mobile Caregiver+ Provider Portal.”](#)*

9.4. Importing Recipients From a CSV-File

Recipients are the individuals who will receive services from Caregivers. Depending on the Payers and programs Recipients are enrolled in, some Payers will automatically load a Recipient's profile data into the Mobile Caregiver+ System, while some Providers may be allowed to add Recipients to their Mobile Caregiver+ Provider Portal. For Providers that are allowed to add Recipients to the Mobile Caregiver+ Portal, the system will display the Add Recipient command, +, located in the upper right of the screen, and/or the Import recipients from csv-file command, .

Providers that are adding a large number of Recipients to the Mobile Caregiver+ Portal should use the Import recipients from csv-file function to expedite the process.

9.4.1. Entering Recipient Profile Data

To enter a Recipient’s profile data into a CSV file:

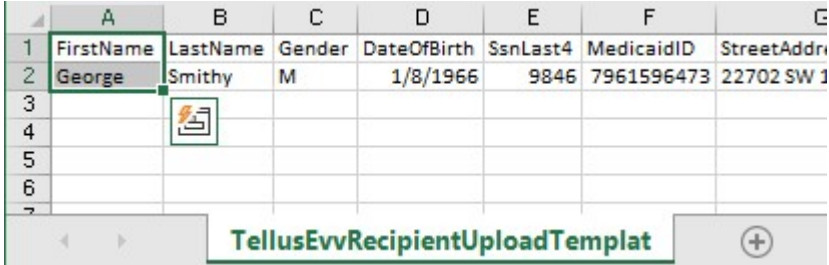
- i. Contact the Netsmart Client Support Team to obtain a copy of the EvvRecipientUploadTemplate.csv template and the Upload Instructions Guide.
- ii. Read the instruction guide.
- iii. Open the EvvRecipientUploadTemplate.csv with Excel or another application.
- iv. Using the instruction guide, enter the Recipient’s profile data into the EvvRecipientUploadTemplate.csv file.

Note: This file includes one row of sample data for an example to work for you to follow. Please remember to delete this row before uploading.

Each column in the excel file has specific rules about what is an acceptable entry; the rules are explained in more detail below.

Keep in mind that, when you edit this template in Excel or Google Sheets, you must save the file as a CSV file before uploading.

COLUMN A – Recipient First Name.



	A	B	C	D	E	F	G
1	FirstName	LastName	Gender	DateOfBirth	SsnLast4	MedicaidID	StreetAddress
2	George	Smithy	M	1/8/1966	9846	7961596473	22702 SW 1
3							
4							
5							
6							
7							

- FirstName is a mandatory field.
- FirstName allows for letters and spaces only (no numbers or special characters).
- FirstName can be up to 255 characters in length or less.

Column B – RECIPIENT Last Name.

	A	B	C	D	E	F	
1	FirstName	LastName	Gender	DateOfBirth	SsnLast4	MedicaidID	Street
2	George	Smithy	M	1/8/1966	9846	7961596473	22702
3							
4							
5							
6							
7							

TellusEvvRecipientUploadTemplat +

- LastName is a mandatory field.
- LastName allows for letters and spaces only (no numbers or special characters).
- LastName can be up to 255 characters in length or less.

COLUMN C – Gender.

	A	B	C	D	E	F	
1	FirstName	LastName	Gender	DateOfBirth	SsnLast4	MedicaidID	Street
2	George	Smithy	M	1/8/1966	9846	7961596473	22702
3							
4							
5							
6							
7							

TellusEvvRecipientUploadTemplat +

- Recipient Gender is a mandatory field.
- The following single-character codes are the only acceptable entries:
 - M = Male.
 - F = Female.
 - N = Non-Binary.
 - O = Other.
 - U = Unknown.

Column D – Recipient Date of Birth.

	A	B	C	D	E	F	
1	FirstName	LastName	Gender	DateOfBirth	SsnLast4	MedicaidID	StreetAddr
2	George	Smithy	M	1/8/1966	9846	7961596473	22702 SW
3							
4							
5							
6							
7							

TellusEvvRecipientUploadTemplat (+)

- DateOfBirth is a mandatory field.
- DateOfBirth must be in MONTH/DAY/YEAR format, and allows for numbers, and “/” only, (no letters, spaces, or special characters other than (“/”).
 - Example: 01/15/1965.

Column E – Recipient Last 4 Digits of Social Security Number.

	A	B	C	D	E	F	
1	FirstName	LastName	Gender	DateOfBirth	SsnLast4	MedicaidID	StreetAddr
2	George	Smithy	M	1/8/1966	9846	7961596473	22702 SW
3							
4							
5							
6							
7							

TellusEvvRecipientUploadTemplat (+)

- SsnLast4 is an optional field.
- SsnLast4 must be four digits in length, and allows numbers only (no letters, spaces, special characters).
- If a Recipient’s Last 4 digits starts with a zero saving the CSV file will remove the zero but our system will pad a leading zero to keep it four digits.
- Example after saving CSV file SSN is 123 => after import SSN is 0123.

Column **F** – Recipient Medicaid ID.

	A	B	C	D	E	F	G
1	FirstName	LastName	Gender	DateOfBirth	SsnLast4	MedicaidID	StreetAddress
2	George	Smithy	M	1/8/1966	9846	7961596473	22702 SW 1
3							
4							
5							
6							
7							

TellusEvvRecipientUploadTemplat +

- MedicaidID is a conditional field. Either Medicaid ID or Payer Member ID must be populated.
- MedicaidID must be 9 - 13 digits in length and allows for numbers and letters only (no spaces, or special characters).
- There should not be any spaces BEFORE the MedicaidID number starts, for example, “123456789” is valid, and “ 123456789” is not valid because there is a space before the “1”.
- If MedicaidID starts with zero, add the letter “M” in front to keep leading zero. Some applications remove zero after saving as a CSV file; our application will remove the letter “M” after import is successful.

Column **G** – Recipient Street Address Line 1

	A	B	C	D	E	F	G	H	I
1	FirstName	LastName	Gender	DateOfBirth	SsnLast4	MedicaidID	StreetAddress1	StreetAddress2	City
2	George	Smithy	M	1/8/1966	9846	7961596473	22702 SW 125th Ave	Apt 2	M
3									
4									
5									
6									
7									

TellusEvvRecipientUploadTemplat +

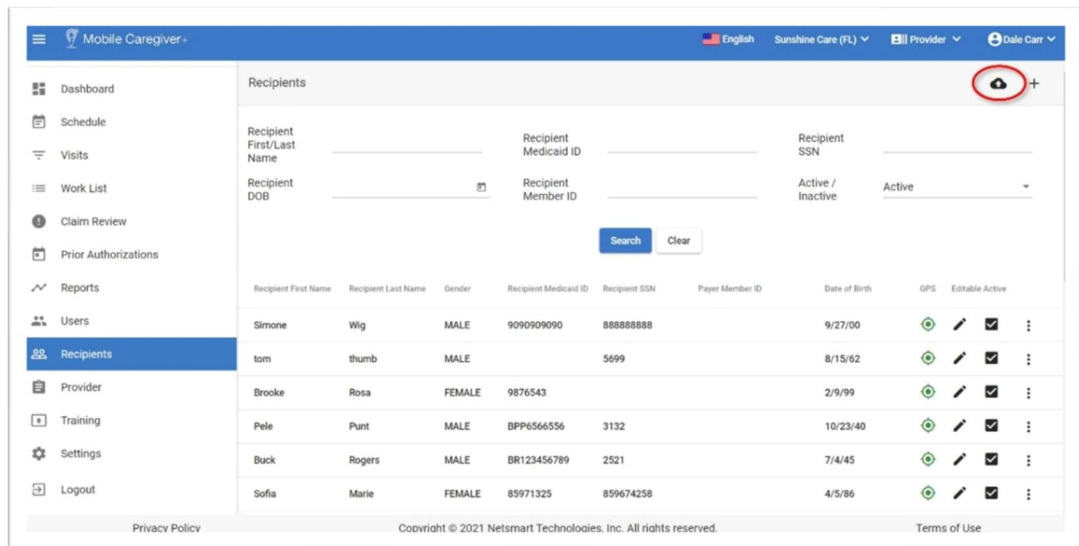
- StreetAddress1 is a mandatory field.
- StreetAddress1 can be up to 40 characters in length or less.
- StreetAddress1 may **only** contain:
 - Letters.
 - Numbers.
 - Spaces.
 - These special characters:
 - # (number sign).
 - ' (apostrophe).


- . (period).
 - , (comma).
 - - (hyphen)
 - / (forward slash).
- v. Be sure to save the document as a CSV file.

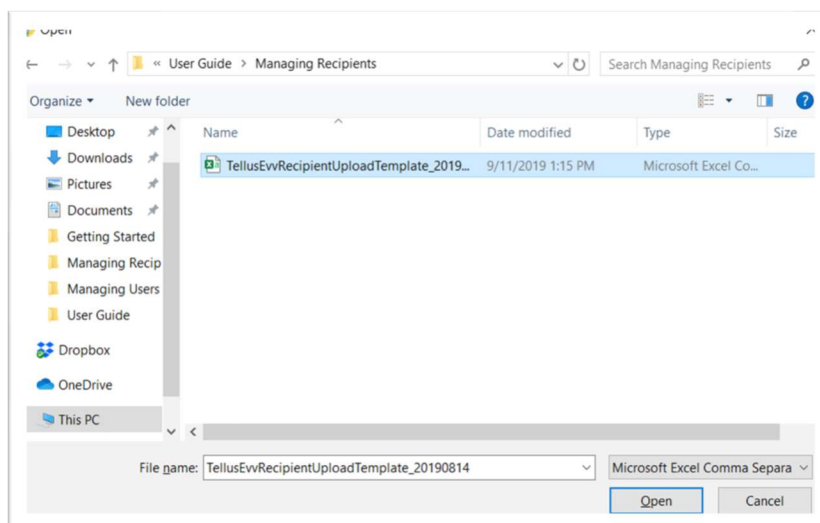
9.4.2. Importing Recipient into the Mobile Caregiver+ Portal

To import Recipients from the CSV file:

- i. From the Main Menu, click **Recipients**.



- ii. Click the **Import recipients from file** icon, , located in the upper right corner of the screen. The system will display the Open File Explorer dialog box.

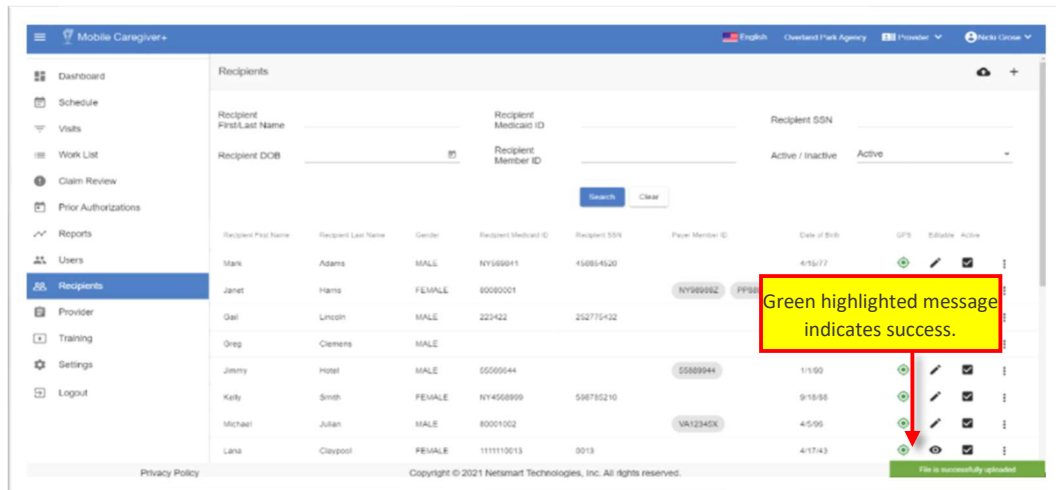


- iii. Locate and click on the CSV file.
- iv. Click **Open**.

Note: The upload process will begin once the file is selected.

Upon successful upload, a small green box in the bottom right corner of your screen will quickly show, saying 'Success'.

Your screen will also update, and you should see your Recipients populated below the headers:



If any errors are identified, a message containing the exact row(s) and column(s) of the error will be shown on your screen.

Please refer to the guide above to troubleshoot the exact error(s).

Note: If there are any errors detected by the system, no records from your file will upload; the entire file must be error free before any Recipient records will upload.

9.5. Linking Caregivers to Recipients from the Linked Users Tab

Caregivers can only view PHI data for the Recipients they are assigned to work with and have been linked to by their Provider Admins.

A Caregiver must be linked to a Recipient in order to view the Recipient’s Mobile Caregiver+ profile. Provider Admins can link Caregivers to Recipients by one of two methods:

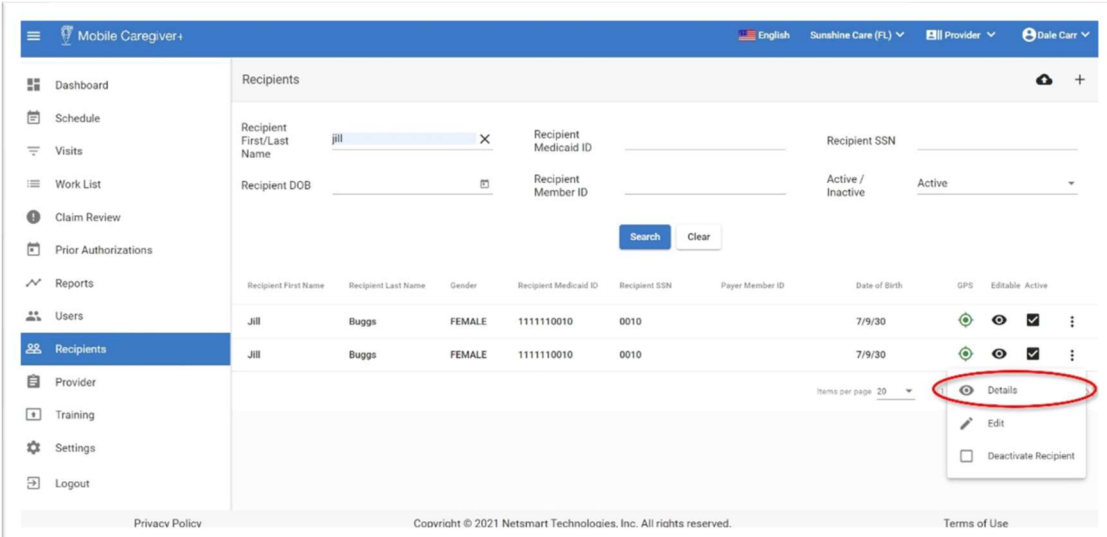
- Linking the Caregiver to each Recipient from the Linked Users tab in each Recipient's Mobile Caregiver+ profile.
- By scheduling the first visit for each Recipient that is assigned to the Caregiver using Add New Visit function.

This chapter provides instructions on how to link Caregivers to Recipients from the Recipient’s Linked Users tab; please refer to Adding/Scheduling Visits for detailed instructions on scheduling visits.

Warning: *Linking a Caregiver to a Recipient will grant the Caregiver access rights to view PHI data for the Recipient.*

To link a Caregiver to a Recipient from the Recipient’s Linked Users tab:

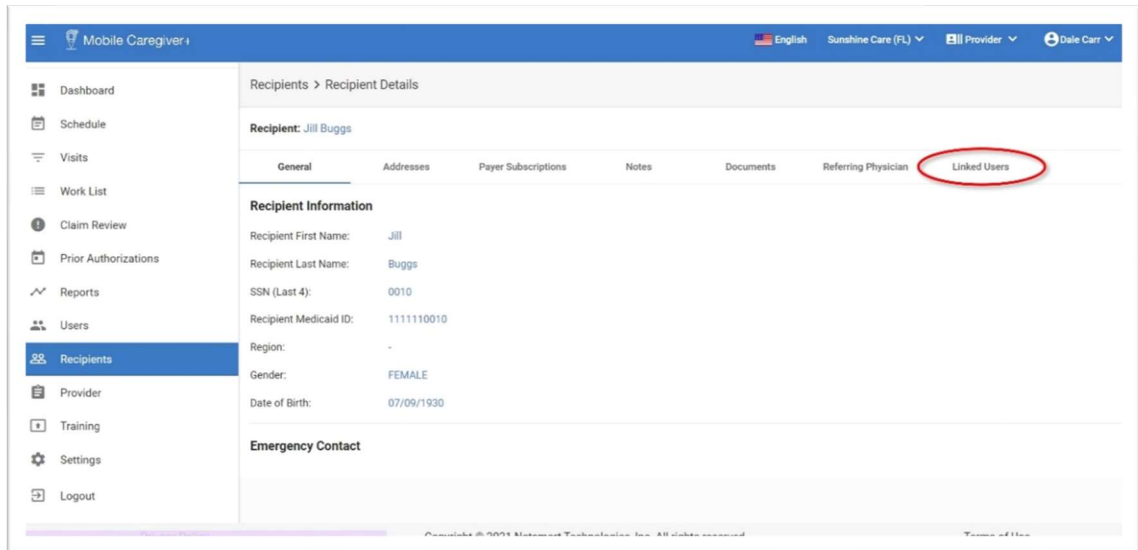
1. From the Main Menu, click **Recipients**.
2. From the Recipients search list, locate, and click on the Actions icon, ⋮, for the Recipient you want to link to the Caregiver.
3. From the shortcut submenu, click **Details**.



The screenshot displays the 'Recipients' page in the Mobile Caregiver+ interface. The page includes a search form with fields for Recipient First/Last Name, Recipient ID, Recipient SSN, Recipient Member ID, and Recipient DOB. Below the search form is a table of recipients with columns for Recipient First Name, Recipient Last Name, Gender, Recipient Medicaid ID, Recipient SSN, Payer Member ID, Date of Birth, GPS, Editable, and Active. The 'Details' option in the actions menu for the first recipient is circled in red.

Recipient First Name	Recipient Last Name	Gender	Recipient Medicaid ID	Recipient SSN	Payer Member ID	Date of Birth	GPS	Editable	Active
Jill	Bugge	FEMALE	1111110010	0010		7/9/30			
Jill	Bugge	FEMALE	1111110010	0010		7/9/30			

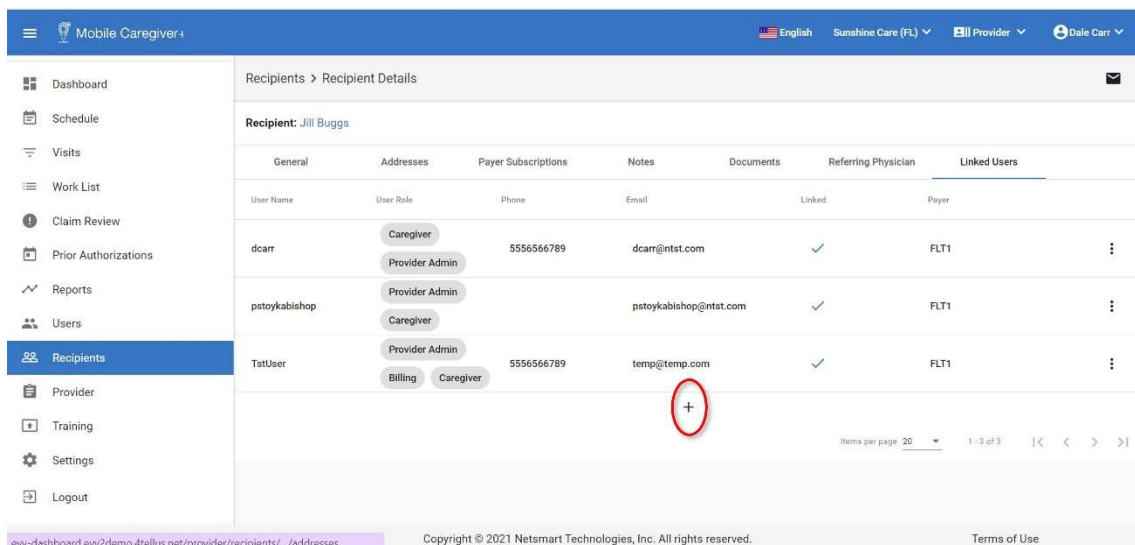
4. From the Recipient Details screen, click on the **Linked Users** tab.



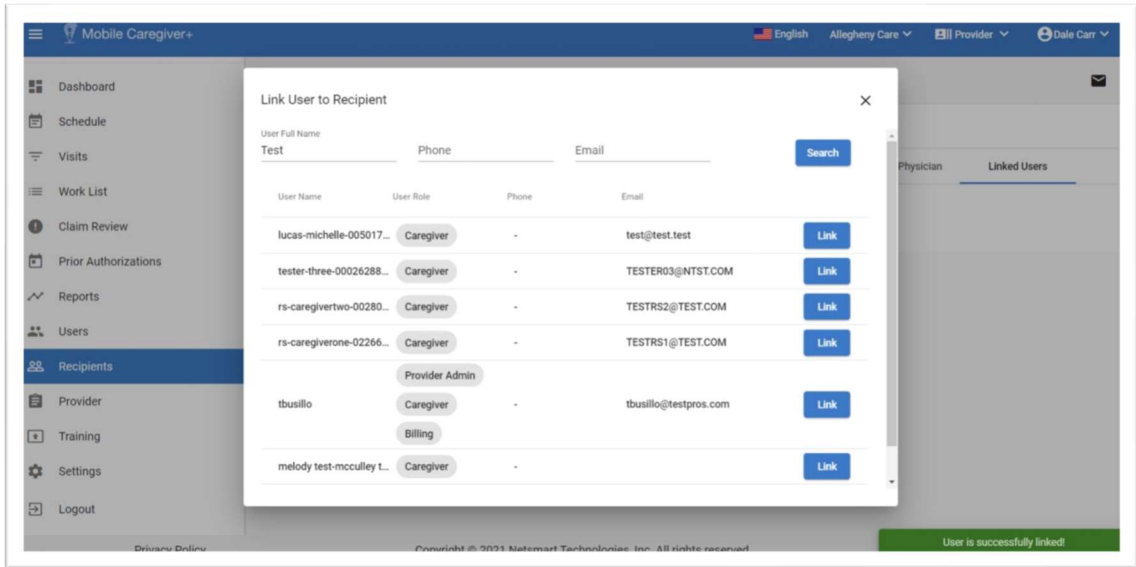
Note: The system will display the Linked Users table with a list of all Users that have been linked to the selected Recipient.

- The Linked status field will display the Linked icon, ✓, if the User currently has an active link to the Recipient.
- The Linked status field will display the Unlinked icon, ✗, if the User is not currently, but was previously, linked to the selected Recipient.

5. From the Linked Users table, click the Link User to Recipient icon, +, located below the list of linked Users.



6. From the Link User to Recipient screen, enter the Caregiver’s full name, phone number, or email address in one or more of the search fields in the header.
7. Click the blue **Search** command.

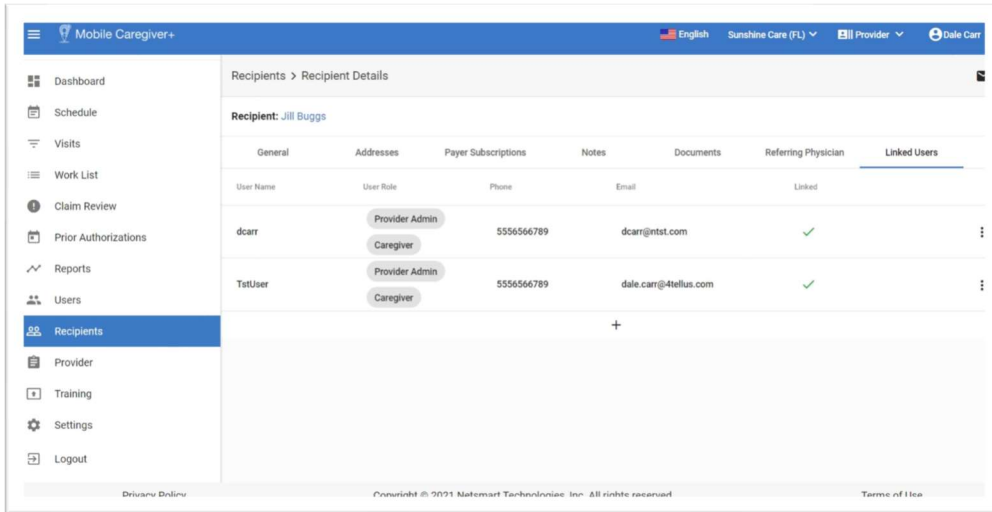


Note: The system will display a list of all existing Netsmart EVV User Accounts that have a matching name, email address, or phone number in the respective profiles.

8. Locate the User’s record and click the blue **Link** command, to link the Caregiver to the Recipient.

Note: The system will link the current Recipient to the Caregiver by creating a new User/Recipient link record. An audit record will be created with the link date.

9. Click the close command, the “X” in the upper right corner, to close the Link User to Recipient screen.



Recipients > Recipient Details						
Recipient: Jill Buggs						
General	Addresses	Payer Subscriptions	Notes	Documents	Referring Physician	Linked Users
User Name	User Role	Phone	Email	Linked		
dcarr	Provider Admin Caregiver	5556566789	dcarr@ntst.com	✓	⋮	
TstUser	Provider Admin Caregiver	5556566789	dale.carr@4tellus.com	✓	⋮	
+						

Note: The system will display a green checkmark in the Linked status field, indicating that the Caregiver has an active link to the selected Recipient.



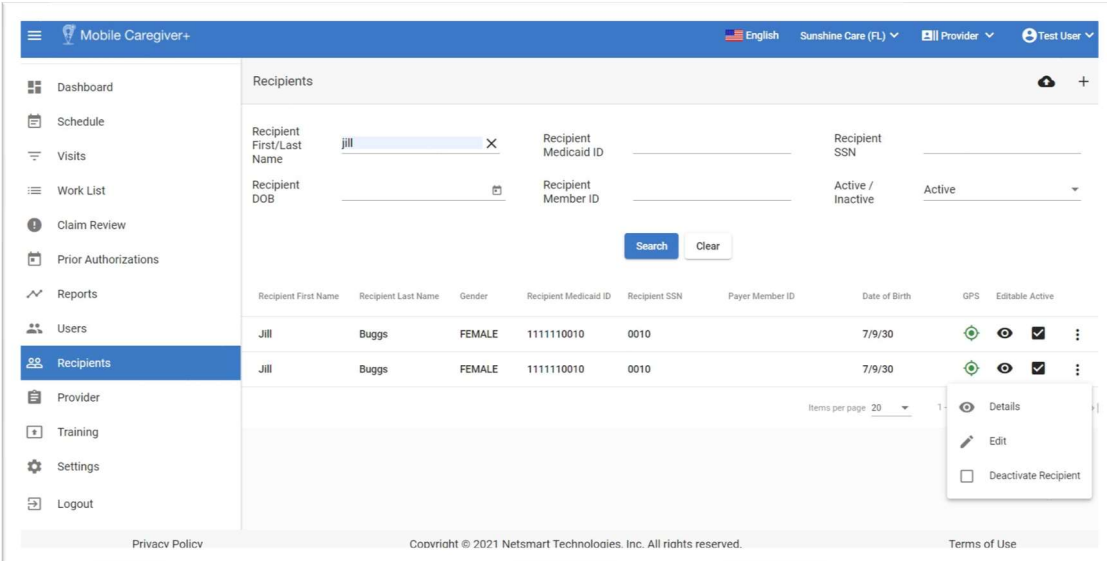
9.6. Unlinking Caregivers from Recipients via the Linked Users Tab

Provider Admins have access rights to Link and Unlink Caregivers to Recipients from each Recipient’s Linked Users tab.

Warning: *Unlinking a Caregiver from a Recipient will cancel the Caregiver’s access rights to view PHI data for the Recipient. The system will automatically cancel all future visits that the Caregiver has scheduled with the Recipient.*

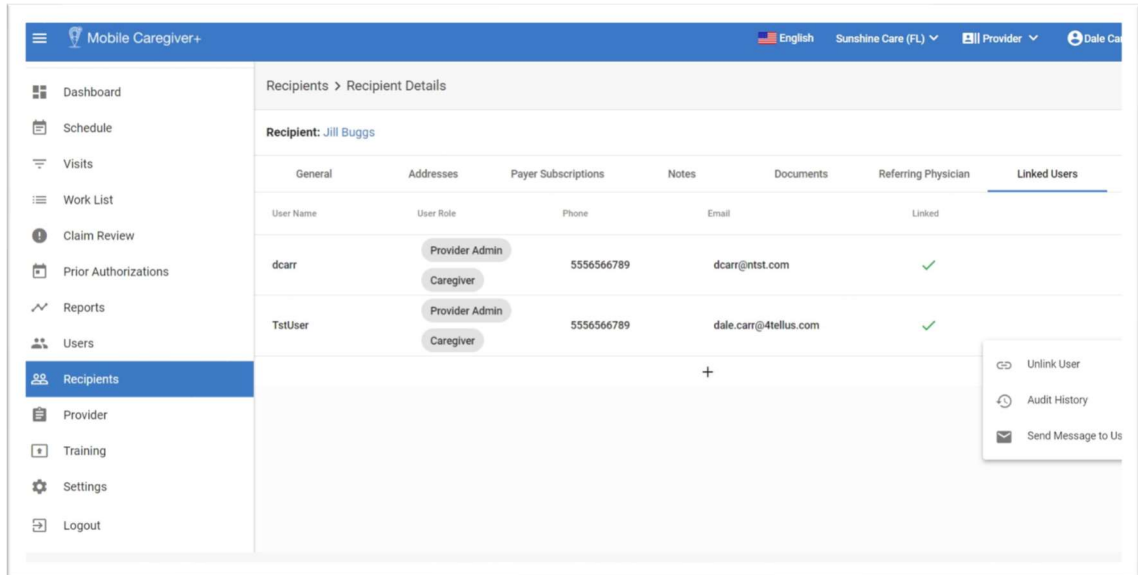
To unlink a Caregiver from a Recipient from the Linked Users tab:

1. From the Main Menu, click **Recipients**.
2. From the Recipients search list, locate and click on the Actions icon, ⋮, for the Recipient that you want to unlink from the Caregiver.
3. From the shortcut submenu, click **Details**.



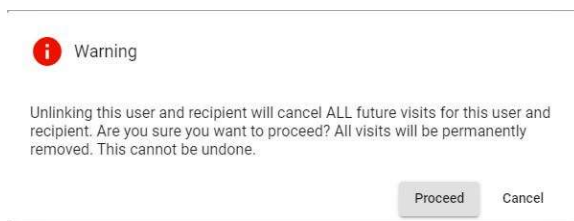
Recipient First Name	Recipient Last Name	Gender	Recipient Medicaid ID	Recipient SSN	Payer Member ID	Date of Birth	GPS	Editable	Active
Jill	Buggs	FEMALE	1111110010	0010		7/9/30			<input checked="" type="checkbox"/>
Jill	Buggs	FEMALE	1111110010	0010		7/9/30			<input checked="" type="checkbox"/>

4. Click on the **Linked Users** tab.



The system will display the Linked Users table with a list of all Users that have been linked to the selected Recipient.

- The Linked status field will display the Linked icon, ✓, if the Recipient currently has an active link to the User.
 - The Linked status field will display the Unlinked icon, ✗, if the User is not currently, but was previously, linked to the selected Recipient.
5. Click on the Actions icon, ⋮, located to the right of the linked Caregiver’s record.
 6. From the shortcut submenu, click **Unlink User**.

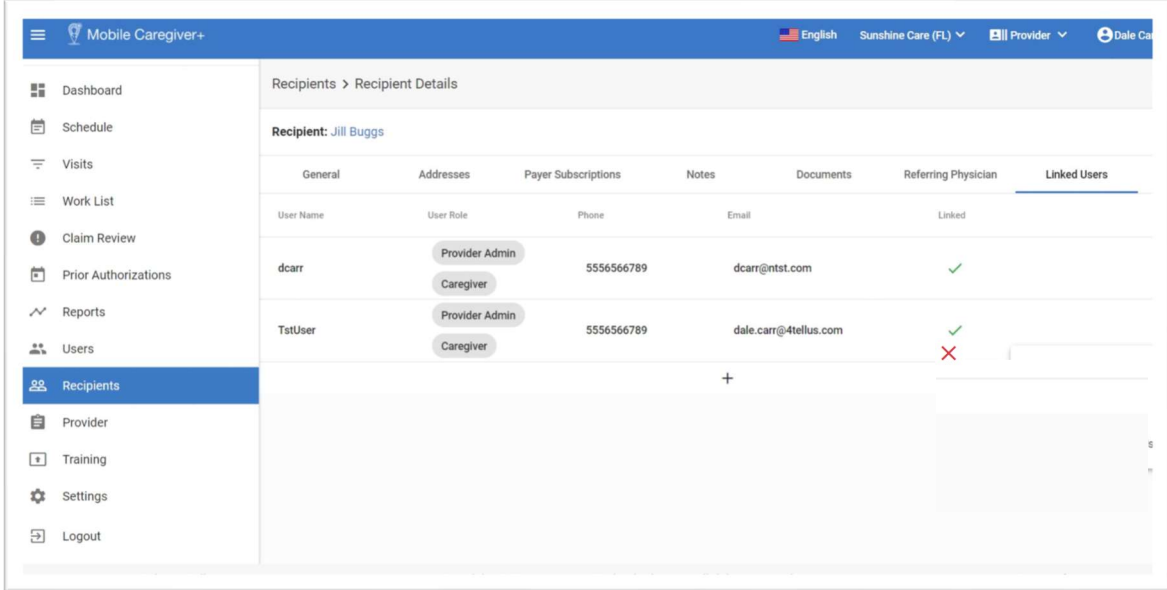


7. From the Unlink User warning confirmation dialog box, click **Proceed** to unlink the Caregiver.

Note: The system will unlink the Caregiver from the selected Recipient. An audit record will be created with the unlinked date.

Warning: Unlinking a Caregiver will automatically revoke the Caregiver’s access to PHI data for the Recipient and cancel all future visits that have been scheduled

with the Recipient. *If you want to reassign scheduled visits to a different Caregiver, you must reschedule the visits prior to unlinking the Caregiver.*



The screenshot shows the 'Recipients > Recipient Details' page for 'Jill Buggs'. A table lists linked users with columns for User Name, User Role, Phone, Email, and Linked status. The 'Linked' column shows a green checkmark for 'dcarr' and a red 'X' for 'TstUser'.

User Name	User Role	Phone	Email	Linked
dcarr	Provider Admin Caregiver	5556566789	dcarr@ntst.com	✓
TstUser	Provider Admin Caregiver	5556566789	dale.carr@4tellus.com	✗

Note: The system will display a red “✗” in the Linked status field, indicating that the Caregiver does not have an active link to the selected Recipient



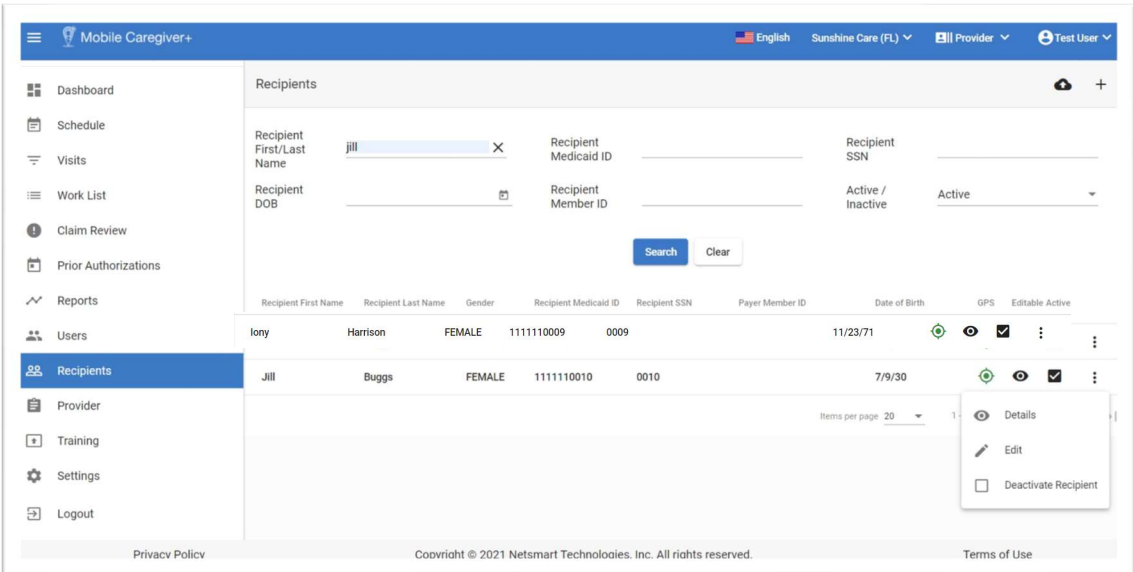
9.7. Relinking Caregivers to Recipients via the Linked Users Tab

Provider Admins have access rights to Link and Unlink Caregivers to Recipients from each Recipient’s Linked Users tab.

Warning: *Linking a Caregiver to a Recipient will grant the Caregiver access rights to view PHI data for the Recipient.*

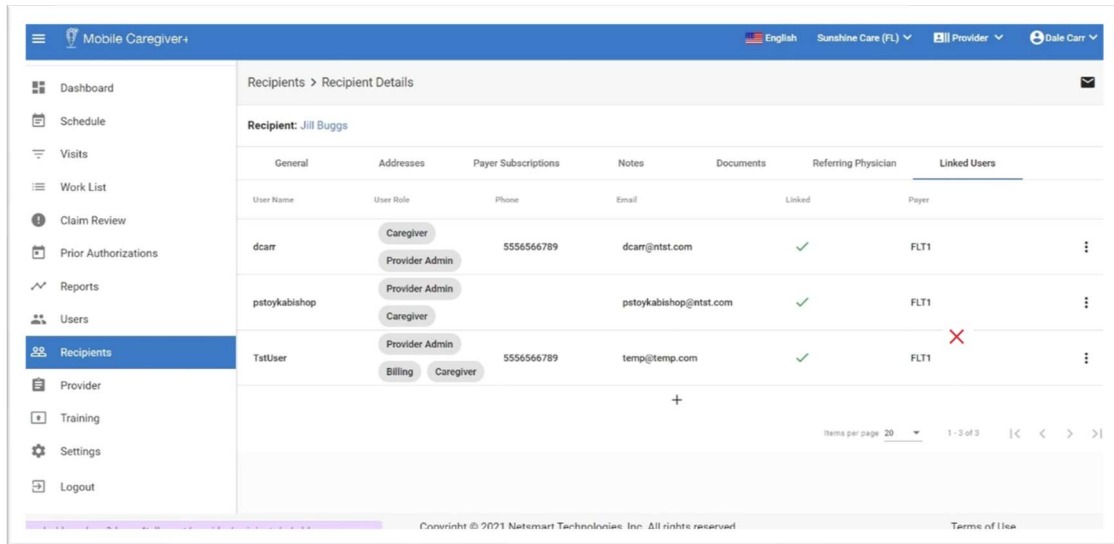
To relink a Caregiver to a Recipient from the Linked Users tab:

1. From the Main Menu, click **Recipients**.
2. From the Recipients search list, locate and click on the Actions icon, ⋮, for the Recipient that you want to relink to the Caregiver.
3. From the shortcut submenu, click **Details**.



The screenshot displays the 'Recipients' search page in the Mobile Caregiver+ application. The top navigation bar includes 'Mobile Caregiver+', language settings ('English'), location ('Sunshine Care (FL)'), provider selection, and user role ('Test User'). A left sidebar contains navigation options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients (highlighted), Provider, Training, Settings, and Logout. The main content area features a search form with the following fields: Recipient First/Last Name (jill), Recipient Medicaid ID, Recipient SSN, Recipient DOB, and Recipient Member ID. Below the search form is a table of recipients with the following columns: Recipient First Name, Recipient Last Name, Gender, Recipient Medicaid ID, Recipient SSN, Payer Member ID, Date of Birth, GPS, and Editable Active. The table lists two recipients: Iony Harrison (FEMALE, 1111110009, 0009, 11/23/71) and Jill Buggs (FEMALE, 1111110010, 0010, 7/9/30). A dropdown menu is open for the 'Jill Buggs' row, showing options: Details, Edit, and Deactivate Recipient. The footer contains 'Privacy Policy', 'Copyright © 2021 Netsmart Technologies, Inc. All rights reserved.', and 'Terms of Use'.

4. Click on the **Linked Users** tab.

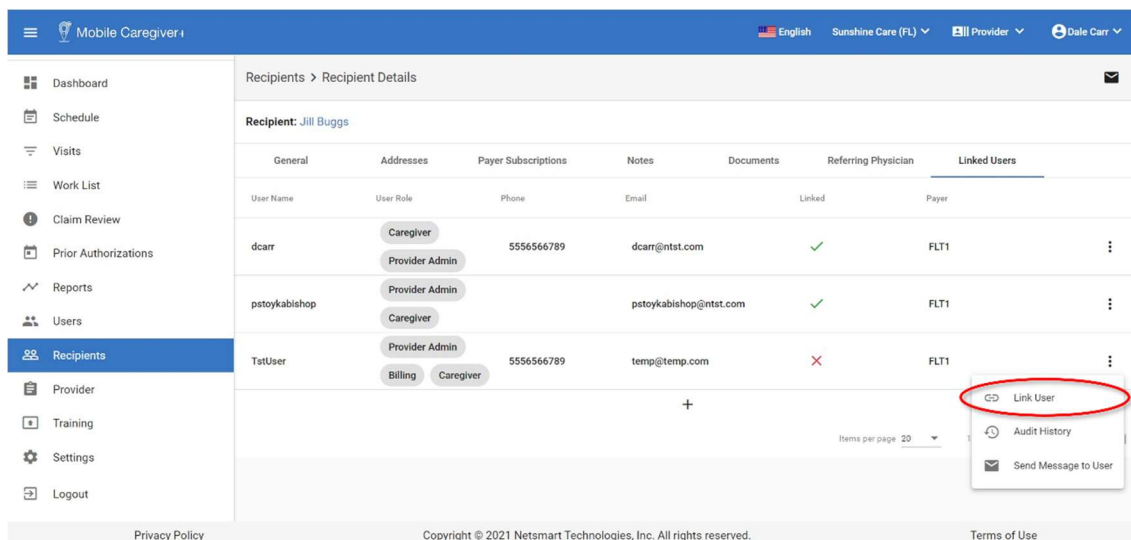


*Note: The system will display the **Linked Users** table with a list of all Users that have been linked to the selected Recipient.*

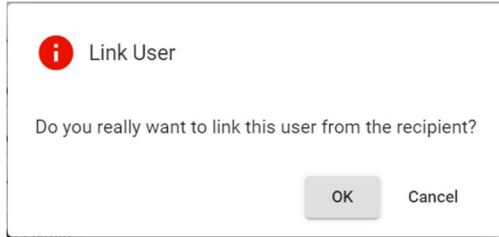
- The Linked status field will display the Linked icon, ✓, if the Recipient currently has an active link to the User.
- The Linked status field will display the Unlinked icon, ✗, if the User is not currently, but was previously, linked to the selected Recipient.

5. To relink a Caregiver to a Recipient, click on the Actions icon, ⋮, located to the right of the unlinked Caregiver's record.

6. From the shortcut submenu, click **Link User**.



7. From the Link User confirmation dialog box, click **Ok** to relink the Caregiver to the Recipient.



Note: The system will relink the Caregiver to the selected Recipient. An audit record will be created with the linked date.

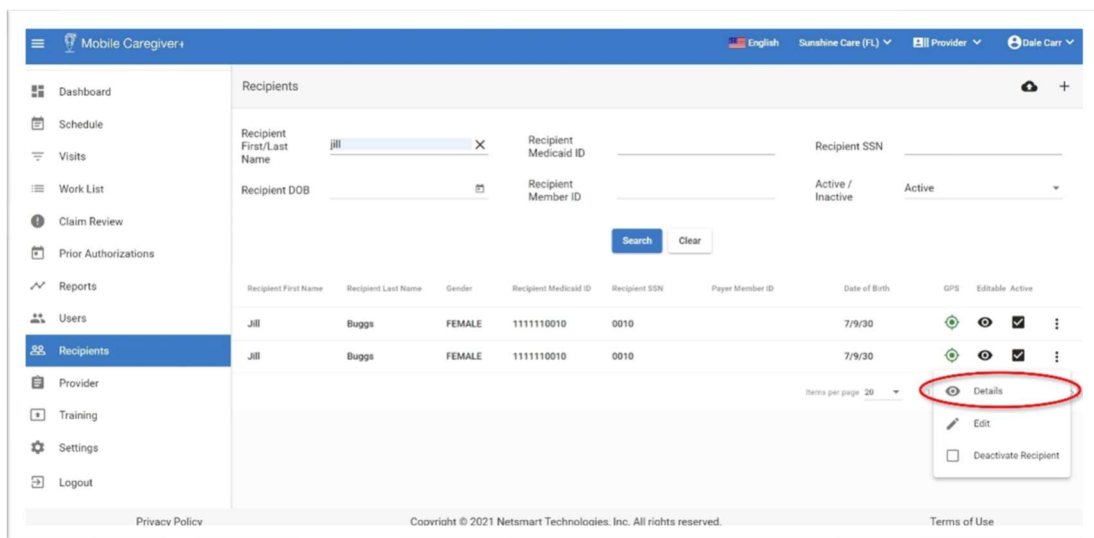
The system will display a green checkmark “✓” in the Linked status field, indicating that the Caregiver currently has an active link to the selected Recipient.

9.8. Reviewing Caregiver’s Link Audit History

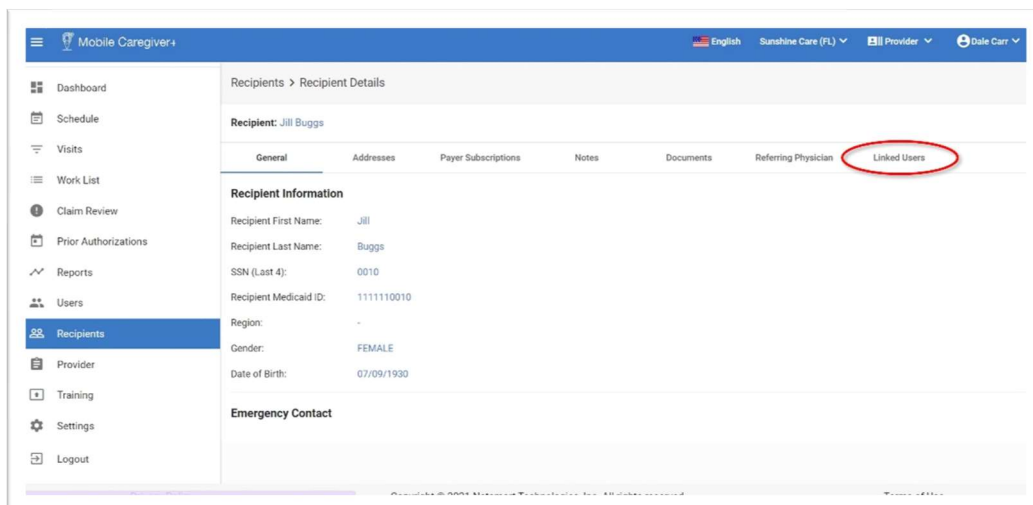
Providers have access rights to the Link Audit History reports for Recipients.

To review the Link Audit History for a Caregiver:

1. From the Main Menu, click **Recipients**.
2. From the Recipients search list locate and click on the Actions icon, ⋮, for the Recipient you want to review the link Audit History.
3. From the shortcut submenu, click **Details**.

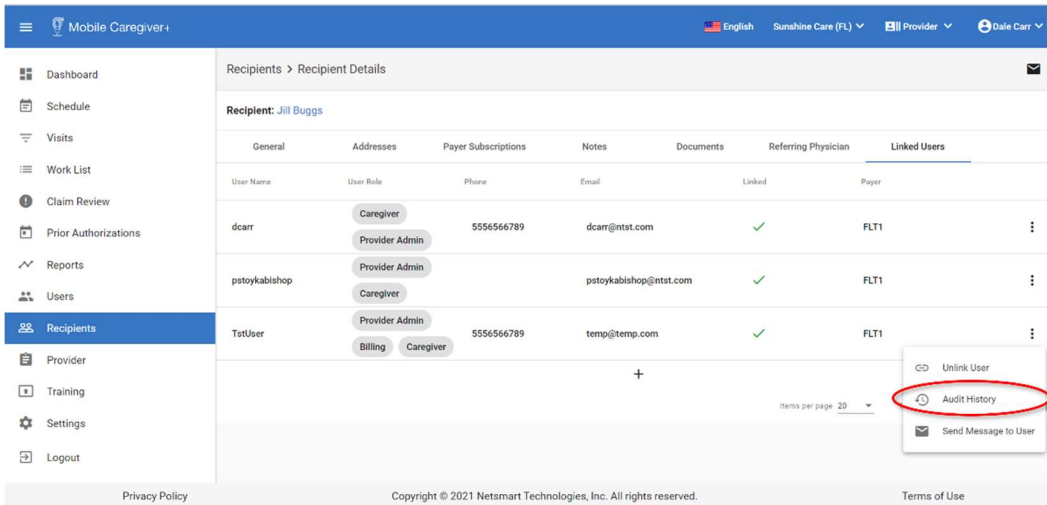


4. From the Recipient Details screen, click on the **Linked Users** tab.



The system will display the Linked Users table with a list of all Users that have been linked to the selected Recipient.

- The Linked status field will display the Linked icon, ✓, if the Recipient currently has an active link to the User.
 - The Linked status field will display the Unlinked icon, ✗, if the User is not currently linked but was previously linked to the selected Recipient.
5. Click on the Actions icon, ⋮, located to the right of the record for Caregiver whose link history you wish to review.
 6. From the shortcut submenu, click **Audit History**.



User Name	User Role	Phone	Email	Linked	Payer
dcarr	Caregiver Provider Admin	5556566789	dcarr@ntst.com	✓	FLT1
pstoykabishop	Provider Admin Caregiver		pstoykabishop@ntst.com	✓	FLT1
TstUser	Provider Admin Billing Caregiver	5556566789	temp@temp.com	✓	FLT1

Note: The system will display the Link Audit History for the Caregiver.

Recipient Name	User Name	User Role	Date Linked	Date Unlinked	Unlinked By
Jill Buggs	dcarr	Caregiver Provider Admin	10/6/2021		




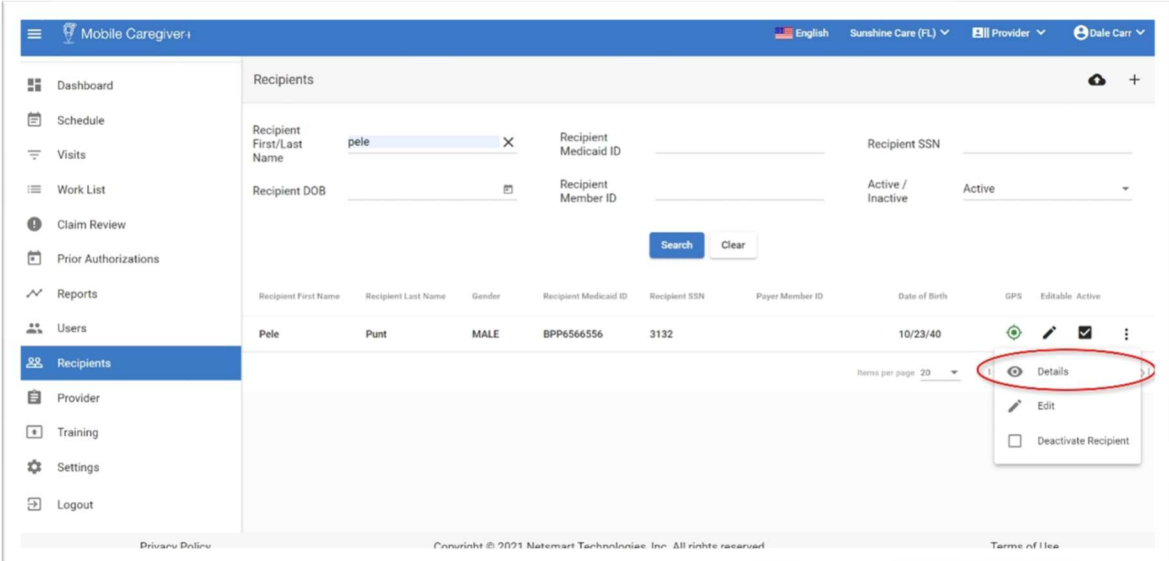
9.9. Viewing Designee Information

A Provider Administrator has the ability to view designee information that is passed from the CareRecord.

Disclaimer: This option will **ONLY** be available for Mobile Caregiver+ Users that are employed by Providers who have Netsmart CareRecord subscriptions.

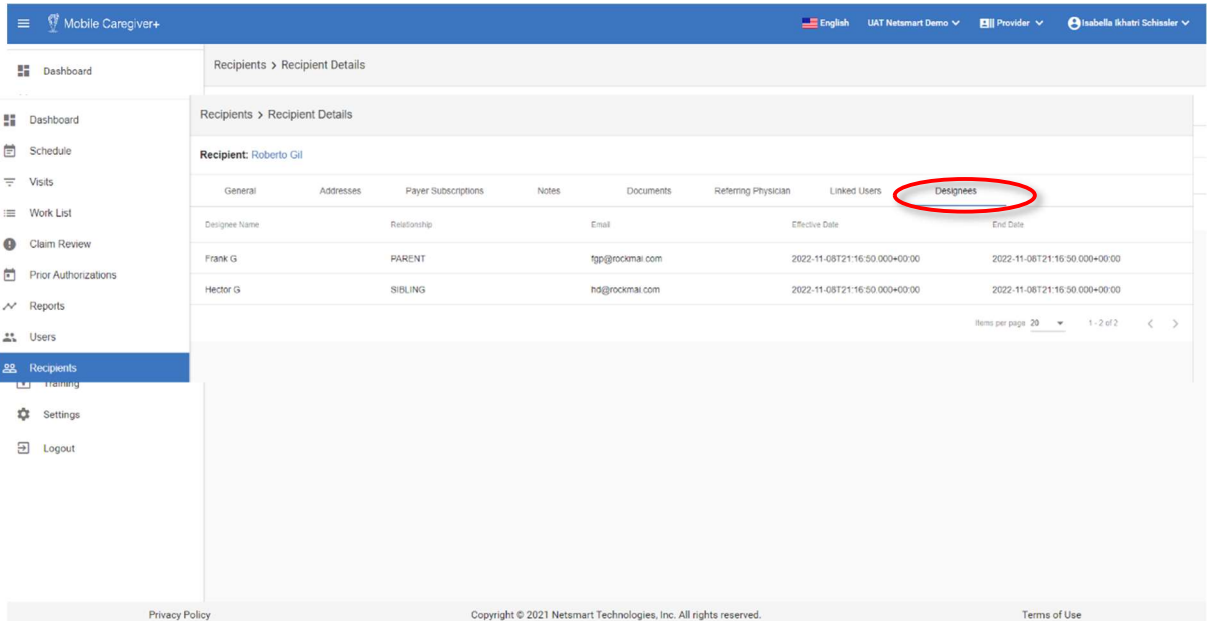
To view designee information:

1. From the Main Menu, click **Recipients**.
2. Find the Recipient and click on the Actions icon, , for whom you want to view designee information.
3. From the shortcut submenu, click **Details**.



The screenshot displays the 'Recipients' page in the Mobile Caregiver+ application. The left sidebar contains a navigation menu with 'Recipients' selected. The main content area features a search form with the following fields: Recipient First/Last Name (containing 'pele'), Recipient Medicaid ID, Recipient SSN, Recipient DOB, Recipient Member ID, and Active/Inactive (set to 'Active'). A 'Search' button is present. Below the search form is a table with columns: Recipient First Name, Recipient Last Name, Gender, Recipient Medicaid ID, Recipient SSN, Payer Member ID, Date of Birth, GPS, Editable, and Active. The first row of the table is highlighted, and a context menu is open over it, showing options: Details, Edit, and Deactivate Recipient. The 'Details' option is circled in red.

4. Click on the **Designees** tab.



Recipient: Roberto Gil

Designee Name	Relationship	Email	Effective Date	End Date
Frank G	PARENT	fgp@rockmai.com	2022-11-08T21:16:50.000+00:00	2022-11-08T21:16:50.000+00:00
Hector G	SIBLING	hdg@rockmai.com	2022-11-08T21:16:50.000+00:00	2022-11-08T21:16:50.000+00:00

Items per page: 20 | 1 - 2 of 2


Note: All active and inactive designees' information will be displayed. The information includes the first and last name, the relationship, the email, the effective date, and the end date.

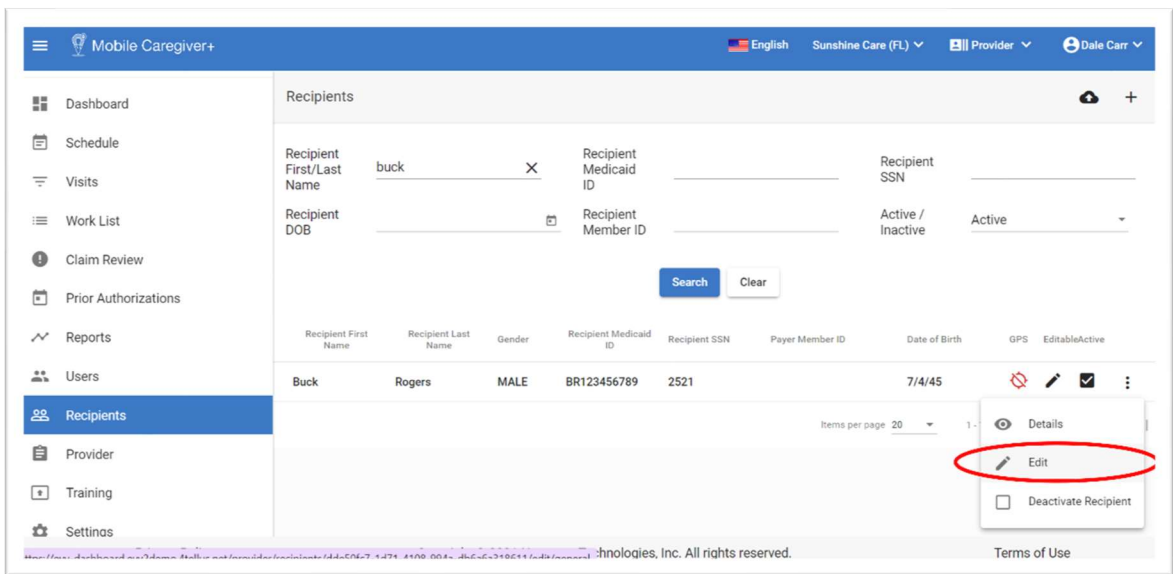


9.10. Editing a Recipient’s MCG+ Profile Data

Depending on the Payers and Programs Recipient are enrolled in, some Providers may have limited access rights to update profile data for Recipients that are automatically loaded into the Mobile Caregiver+ Portal, such as adding additional addresses, while other Providers may be allowed to manually add and modify all Recipient data.

To update a Recipient’s profile data:

1. From the Main Menu, click **Recipients**.
2. Locate and click on the Actions icon, , for the Recipient whose profile you want to edit.
3. From the shortcut submenu, click **Edit**; the system will display the Edit Recipient form.



4. From the Edit Recipient screen, Providers can edit one or more of the following:

Edit Recipient Tab	Editable Profile Detail(s)
General	Recipient’s demographic and emergency contact information.
Address	All Providers will be able to add, remove, and manage Recipient’s list of address(es).
Payer Subscriptions	Review Payer(s) information and edit Recipient’s Diagnosis Code(s).


	<p>***Note: The system will retain the billing sequence of Recipients' Diagnosis Codes as displayed in the Recipient's Mobile Caregiver+ profile; Recipients' Diagnosis Codes will be populated into rendered service records in the same order as they appear in the Recipient's Mobile Caregiver+ profile.***</p>
Notes	Add notes to Recipient's EVV record and review Caregivers' notes. Recipient notes can be viewed by Caregivers.
Documents	Add Documents to Recipient's EVV record – Recipient document(s) can be viewed by Caregivers.
Referring Physician	Add and manage the Recipient's list of referring physicians.

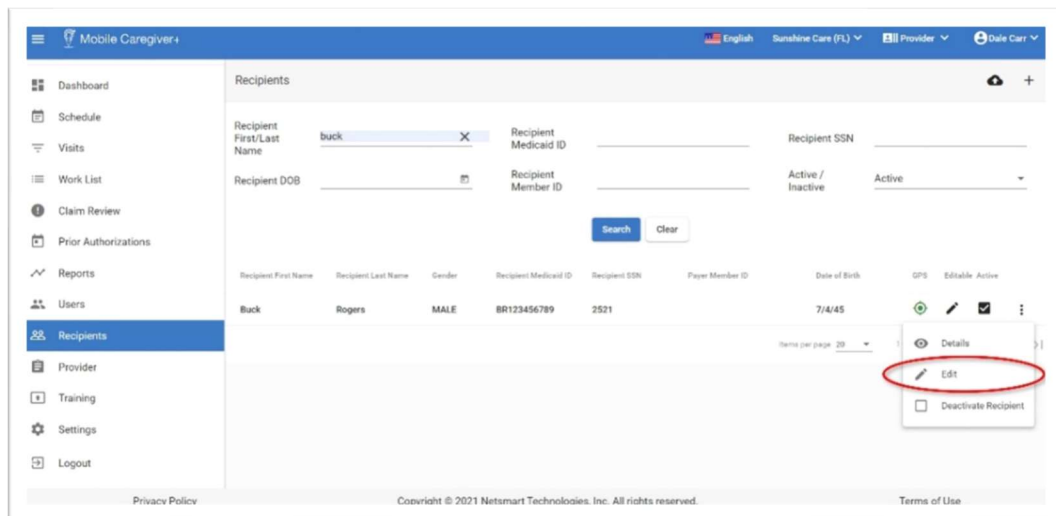
9.10.1. Editing a Recipient's General Profile Data

The General tab displays the Recipient's basic information and emergency contact information.

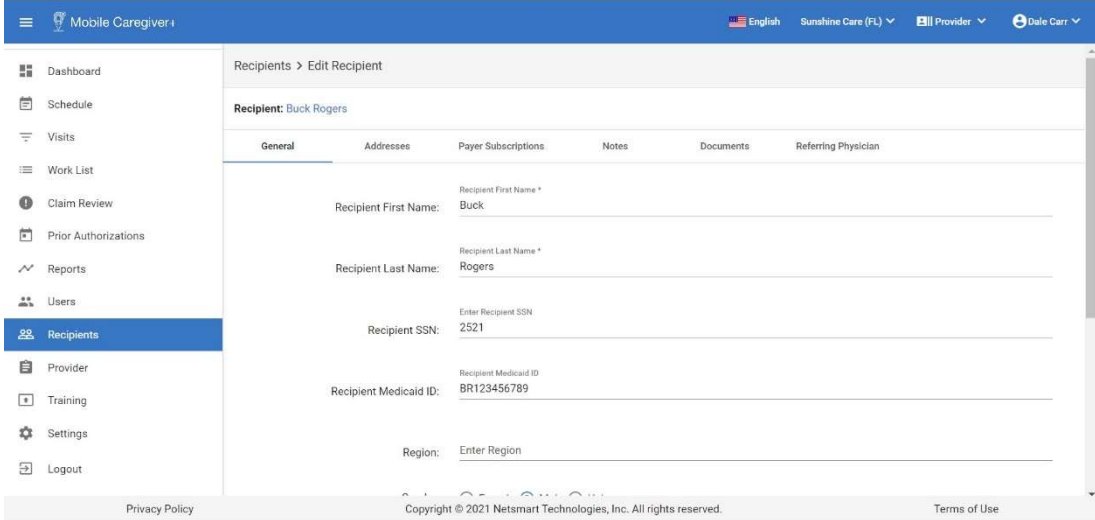
Depending on the Payers and Programs Recipients are enrolled in, some Providers may have limited access rights to update demographic data for Recipients that are automatically loaded into the Mobile Caregiver+ Portal, while other Providers may be allowed to manually add and modify all Recipient data. All Providers will have access rights to add and edit Recipient emergency contact information.

To edit a Recipient's General profile data:

- i. From the Main Menu, click **Recipients**.
- ii. Locate and click on the Actions icon, , for the Recipient whose profile you want to edit.
- iii. From the shortcut submenu, click **Edit**.



- iv. Edit the Recipient's profile data listed on the General tab:



Note: The system will automatically display the General tab of the Edit Recipient screen.

Depending on the Payer Recipients are enrolled with, Providers may have limited access rights to edit demographic data points displayed in the General tab of a Recipient's Mobile Caregiver+ profile.

- **Recipient First Name**
- **Recipient Last Name**
- **Recipient SSN**
- **Recipient Medicaid ID**
- **Region**
- **Gender**
- **Date of Birth**

All Providers will have access rights to add and manage Recipients' emergency contact data:


- **Contact Name**
- **Phone Number**
- **Relationship**

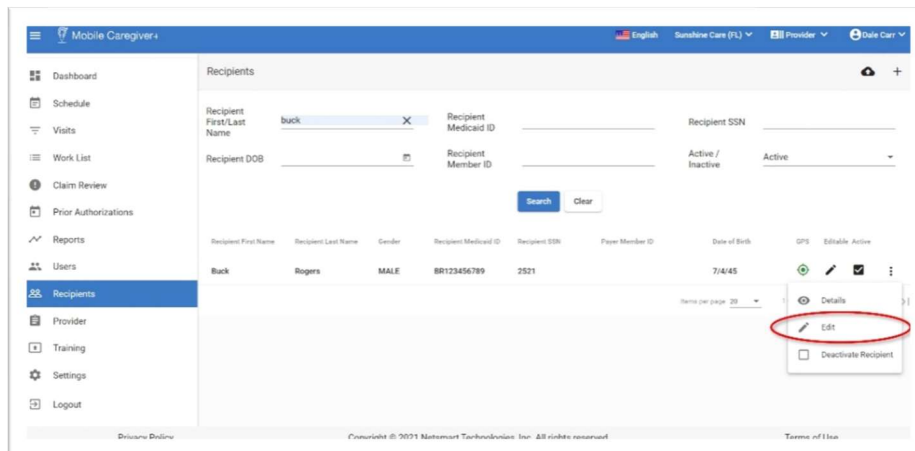
- v. Click **Save** to update the Recipient's Mobile Caregiver+ profile data, click **Reset** to clear all data from the Add New Address form, or click **Close** to discard all data and exit the Add New Address form.

9.10.2. Adding a New Service Address to a Recipient's Mobile Caregiver+ Profile

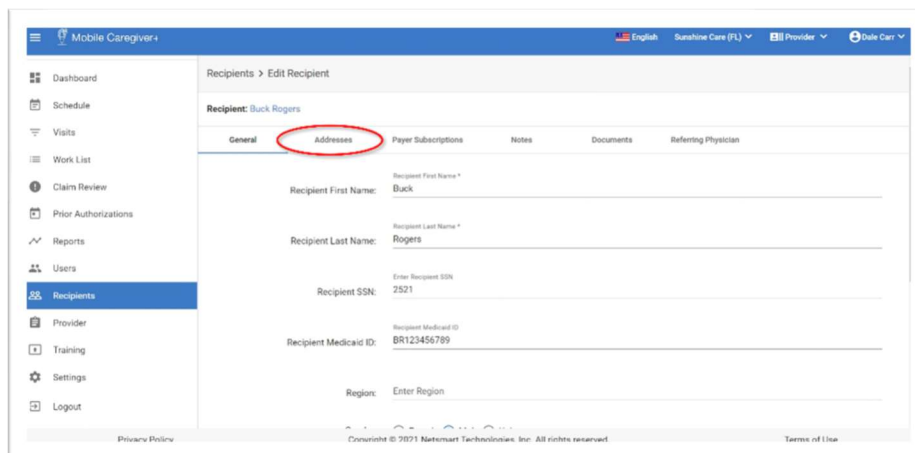
All service addresses on file for a Recipient are listed on the Address tab of the Recipient's Mobile Caregiver+ profile. A yellow star indicates the primary address. All Providers will have access rights to add new addresses and edit Recipients' address information.

To add a new address for a Recipient:


- i. From the Main Menu, click **Recipients**.
- ii. Locate and click on the Actions icon, , for the Recipient whose profile you want to edit.
- iii. From the shortcut submenu, click **Edit**.

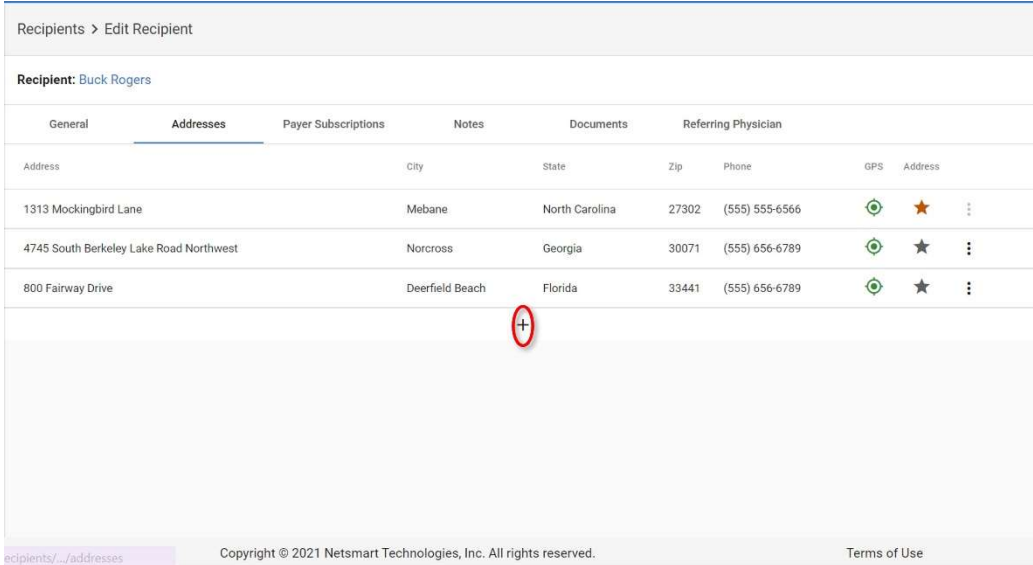


- iv. From the Edit Recipient screen, click on the **Addresses** tab.



Note: The system will automatically display the General tab of the Edit Recipient screen.


- v. To add a new service address, click on the **Add New Addresses** icon, , located at the bottom of the list.



Recipients > Edit Recipient

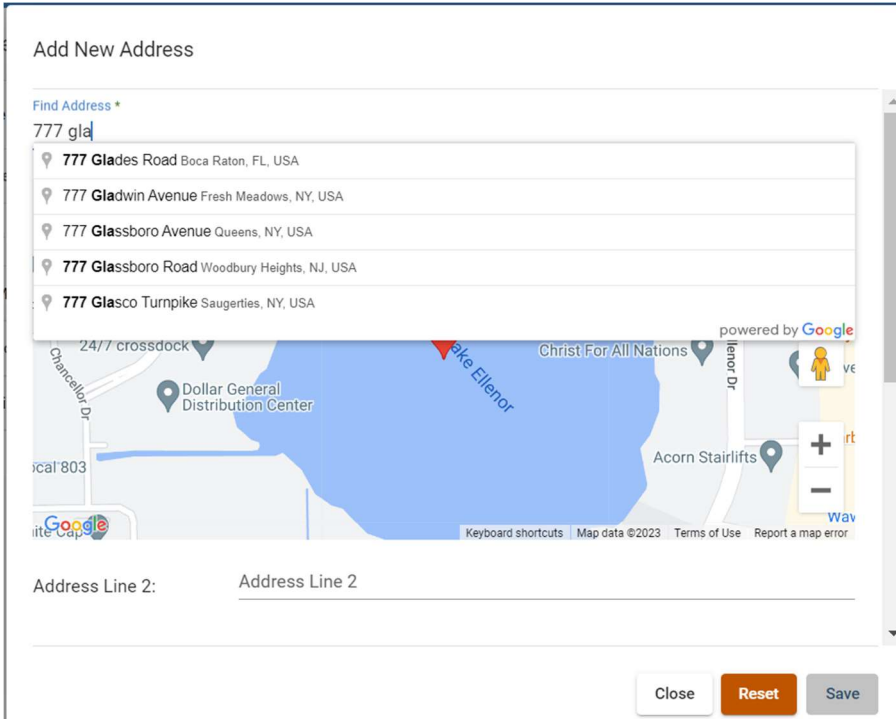
Recipient: Buck Rogers

General	Addresses	Payer Subscriptions	Notes	Documents	Referring Physician
Address	City	State	Zip	Phone	GPS Address
1313 Mockingbird Lane	Mebane	North Carolina	27302	(555) 555-6566	
4745 South Berkeley Lake Road Northwest	Norcross	Georgia	30071	(555) 656-6789	
800 Fairway Drive	Deerfield Beach	Florida	33441	(555) 656-6789	



recipients/.../addresses Copyright © 2021 Netsmart Technologies, Inc. All rights reserved. Terms of Use

- vi. Enter the Recipient’s address information in the **Add New Address** form:



Add New Address

Find Address *

777 gla

- 777 Glades Road Boca Raton, FL, USA
- 777 Gladwin Avenue Fresh Meadows, NY, USA
- 777 Glassboro Avenue Queens, NY, USA
- 777 Glassboro Road Woodbury Heights, NJ, USA
- 777 Glasco Turnpike Saugerties, NY, USA

24/7 crossdock
Dollar General Distribution Center
Lake Ellenor
Christ For All Nations
Acorn Stairlifts
powered by Google

Address Line 2:

Close Reset Save

*Note: Start typing the Recipient's address in the **Find Address** field. The system will display a list of matching validated Google Maps addresses. The system will only allow Providers to add validated addresses via Google Maps.*

If the address you are entering is not found in Google Maps, please refer to [Google Maps Help Center](#) for information on how to fix missing address or wrong pin location.


- **Find Address***: Start typing, then select the matching Google Maps validated service address.
 - **Address Line 2**: This field is optional and can be used to enter an identifying apartment or suite number.
 - **City***: Data is automatically filled in based on the selected validated address.
 - **Zip***: Data is automatically filled in based on the selected validated address.
 - **Address Type**: Some Payers may require that certain services be performed at designated locations (places of service). Click in the Address Type field to select the appropriate type of service location.
 - **County**: This is an optional data field; if applicable, enter the county.
 - **Primary Phone***: This is a mandatory data field enter the Recipient's phone number that is associated with the service address.
 - **Secondary Phone**: This is an optional data field, if applicable enter a secondary phone.
 - **Set Address as Primary**: Click the Set as Primary switch to set the current address as the primary address. The designated Primary Address will automatically be selected when scheduling new visits.
- vii. Click **Save** to add the new service address to the Recipient's Mobile Caregiver+ profile, click **Reset** to clear all data from the Add New Address form, or click **Close** to discard all data and exit the Add New Address form.

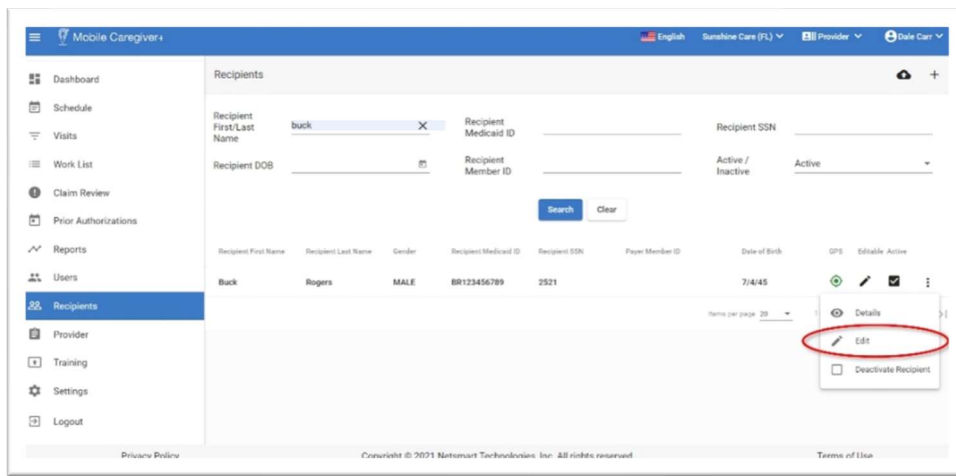
9.10.3. Updating a Recipient's Service Address

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

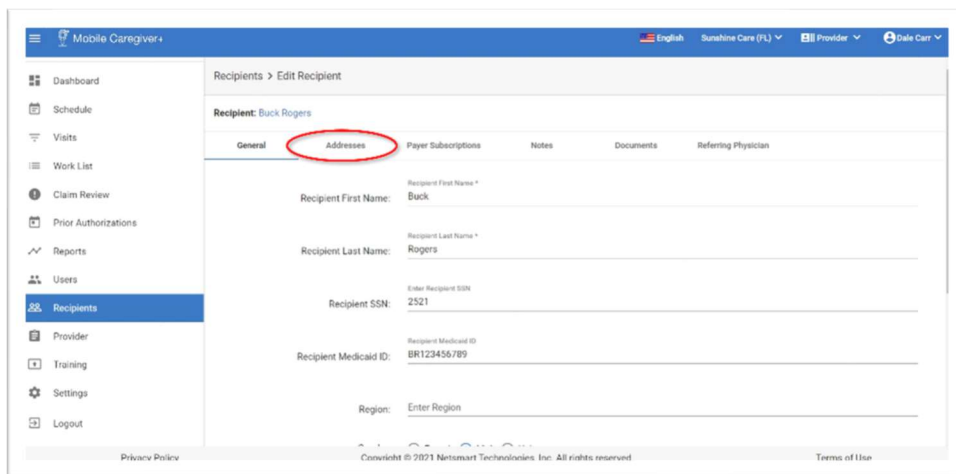
All Providers will have access rights to add new addresses and to edit existing service address in a Recipient's Mobile Caregiver+ profile.

To update the address information for a Recipient:

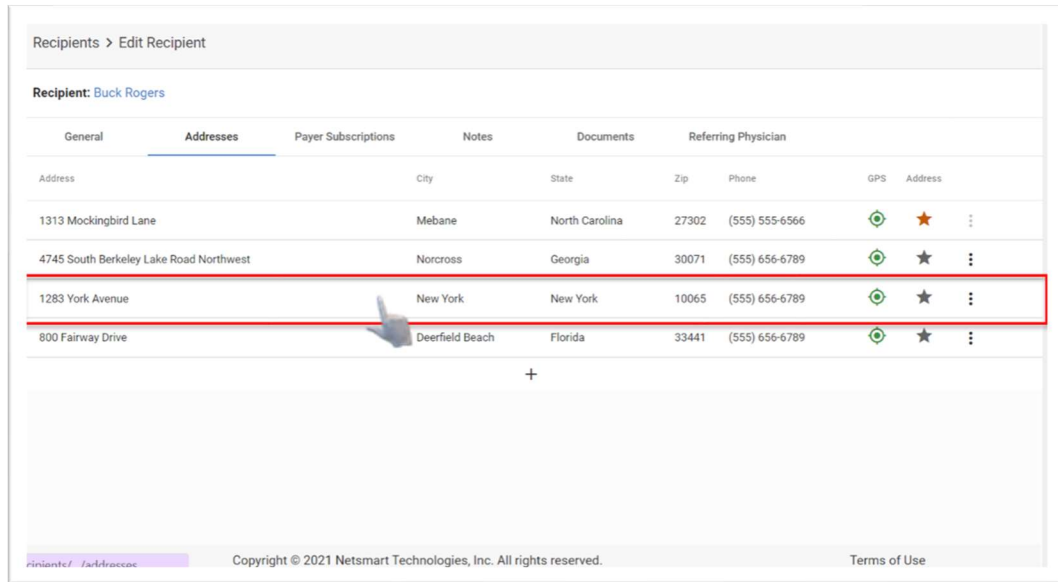
- i. From the Main Menu, click **Recipients**.
- ii. Locate and click on the Actions icon, , for the Recipient whose profile you want to edit.
- iii. From the shortcut submenu, click **Edit**.



- iv. From the Edit Recipient screen, click **Addresses**.

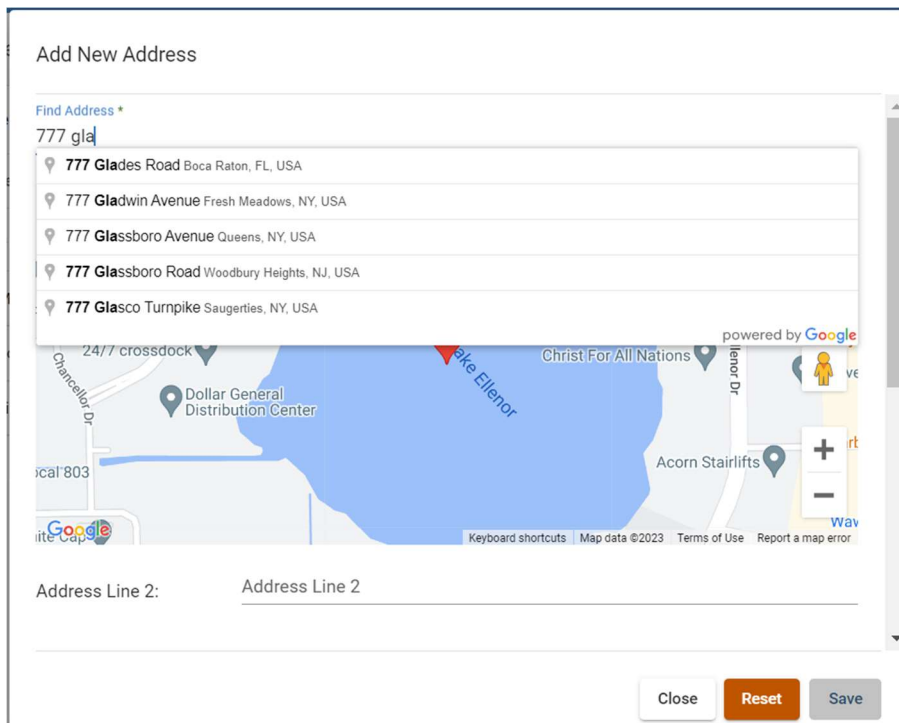


- v. Locate and click on the service address that you want to update.



Note: The system will display a list of active services addresses which have been added to the Recipient’s Mobile Caregiver+ profile.

- vi. Update the Recipient’s address information:



Note: the system will display the details for the service address.



Note: If you are updating an invalid service address, erase the current address and then start typing the correct address in the Find Address field. The system will display a list of matching validated Google Maps addresses. The system will only allow Providers to add validated addresses via Google Maps.


If the address you are entering is not found in Google Maps, please refer to [Google Maps Help Center](#) for information on how to fix missing address or wrong pin location.

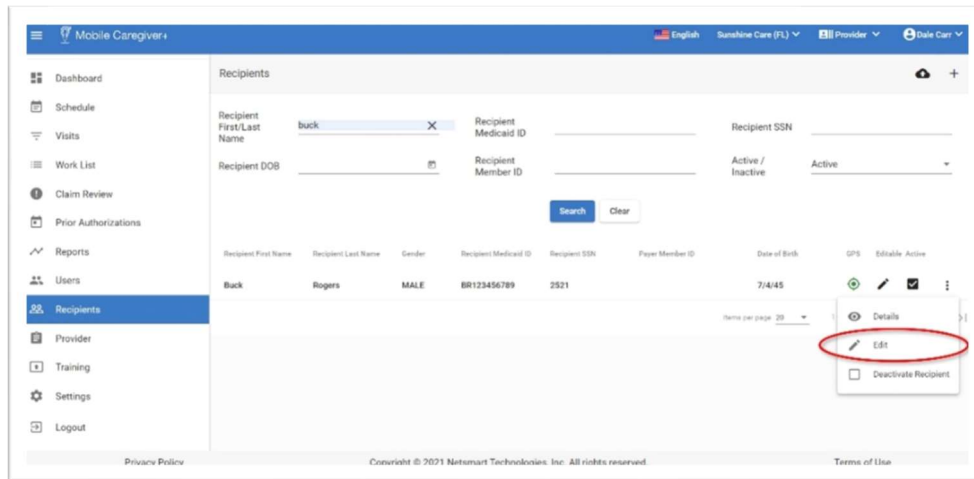
- **Find Address***: Start typing, then select the matching Google Maps validated service address.
 - **Address Line 2**: This field is optional and can be used to enter and identifying apartment or suite number.
 - **City***: Data is automatically filled in based on the selected validated address.
 - **Zip***: Data is automatically filled in based on the selected validated address.
 - **Address Type**: Some Payers may require that certain services be performed at designated locations (places of service). Click in the Address Type field to select the appropriate type of service location.
 - **County**: This is an optional data field; if applicable, enter the county.
 - **Primary Phone***: This is a mandatory data field enter the Recipient's phone number that is associated with the service address.
 - **Secondary Phone**: This is an optional data field, if applicable enter a secondary phone.
 - **Set Address as Primary**: Click the Set as Primary switch to set the current address as the primary address. The designated Primary Address will automatically be selected when scheduling new visits.
- vii. Click **Save** update the service address, click **Reset** to clear all data, or click **Close** to discard all changes and exit the details screen.

9.10.4. Switching a Recipient's Primary Service Address

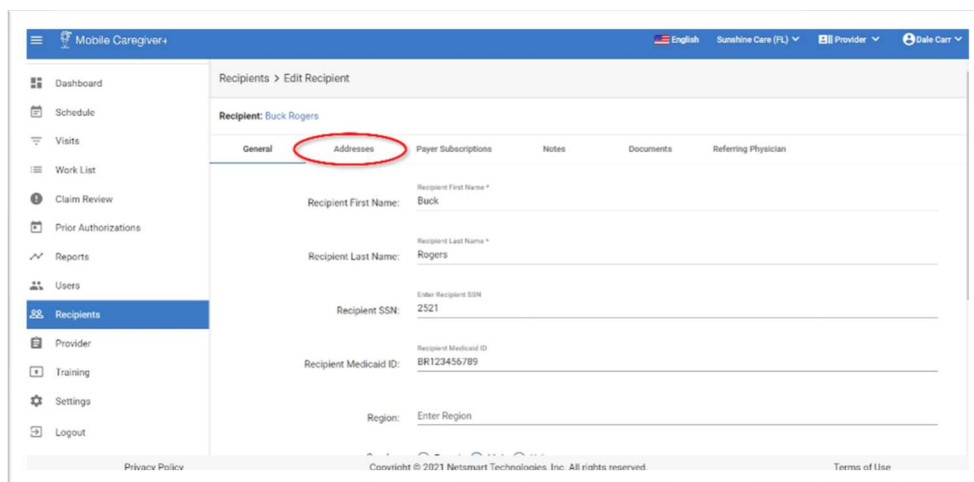
The system will automatically enter the primary address as the start and end addresses for visit that are being added for a Recipient.

To switch (set) the primary service address for a Recipient:

- i. From the Main Menu, click **Recipients**.
- ii. Locate and click on the Actions icon, , for the Recipient whose profile you want to edit.
- iii. From the shortcut submenu, click **Edit**.

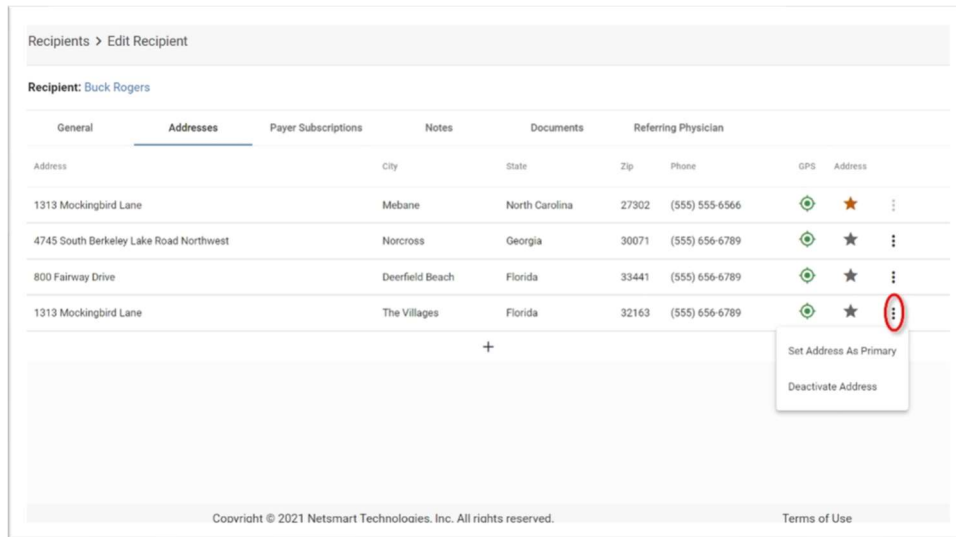


- iv. From the Edit Recipient screen, click **Addresses**.



Note: The system will automatically display the General tab of the Edit Recipient screen.

- v. To change a Recipients Primary service address, click on the Actions icon, ⋮, for the address that you want set as the new default address.
- vi. From the shortcut submenu, click **Set Address As Primary**.



Note: The system will automatically display a list of active service addresses in the Recipient's Mobile Caregiver+ profile.

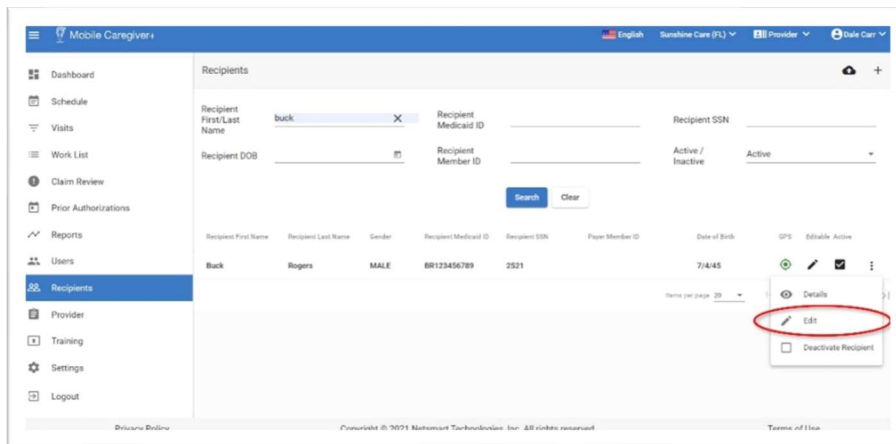
The system will display a green confirmation message, indicating that the service address has been updated.

9.10.5. Deactivating a Service Address from a Recipient's Mobile Caregiver+ Profile

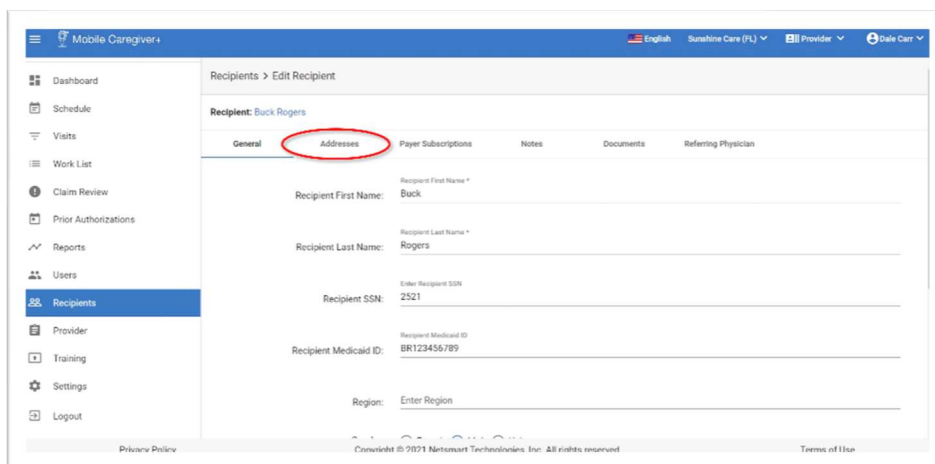
The Mobile Caregiver+ Provider Portal allows Providers to edit or deactivate outdated service addresses from Recipients' profiles.

To deactivate a service address from a Recipient's Mobile Caregiver+ profile:

- i. From the Main Menu, click **Recipients**.
- ii. Locate and click on the Actions icon, ⋮, for the Recipient whose profile you want to edit.
- iii. From the shortcut submenu, click **Edit**.

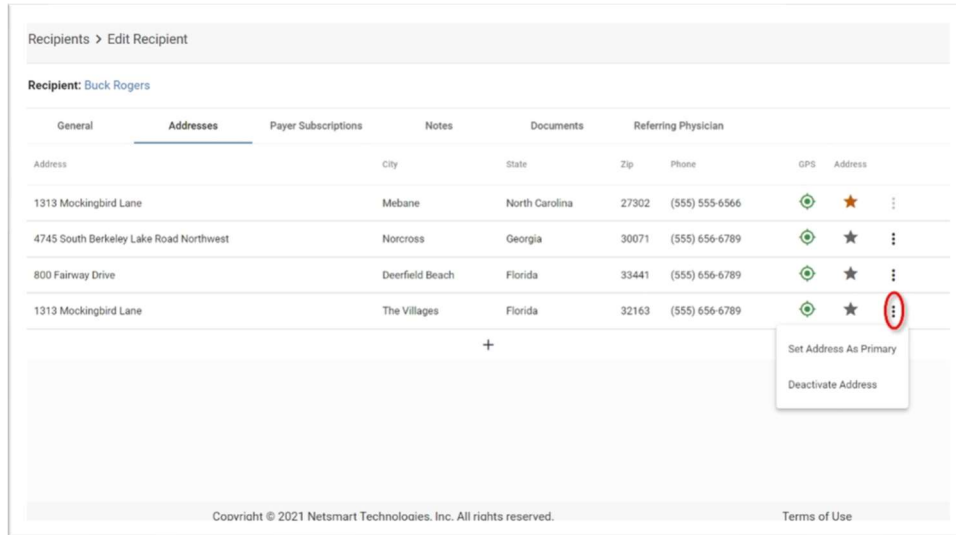


- iv. From the Edit Recipient screen, click **Addresses**.



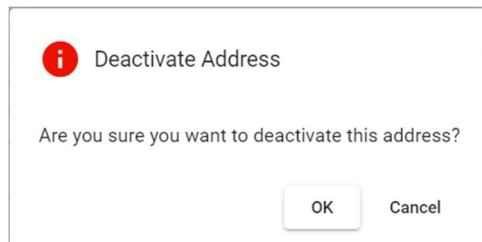
Note: The system will automatically display the General tab of the Edit Recipient screen.

- v. To deactivate an outdated service address, click on the Actions icon, ⋮, for the address that you want to deactivate.
- vi. From the shortcut submenu, click **Deactivate Address**.



Note: The system will a list of active service addresses in the Recipient's Mobile Caregiver+ profile.

- vii. From the Deactivate Address confirmation dialog box, click **OK** to deactivate the service address.



Note: The system will display a green confirmation message, indicating that the service address has been updated.

9.10.6. Adding New Payer Subscriptions


Warning: *Providers must contact Netsmart Client Support.*

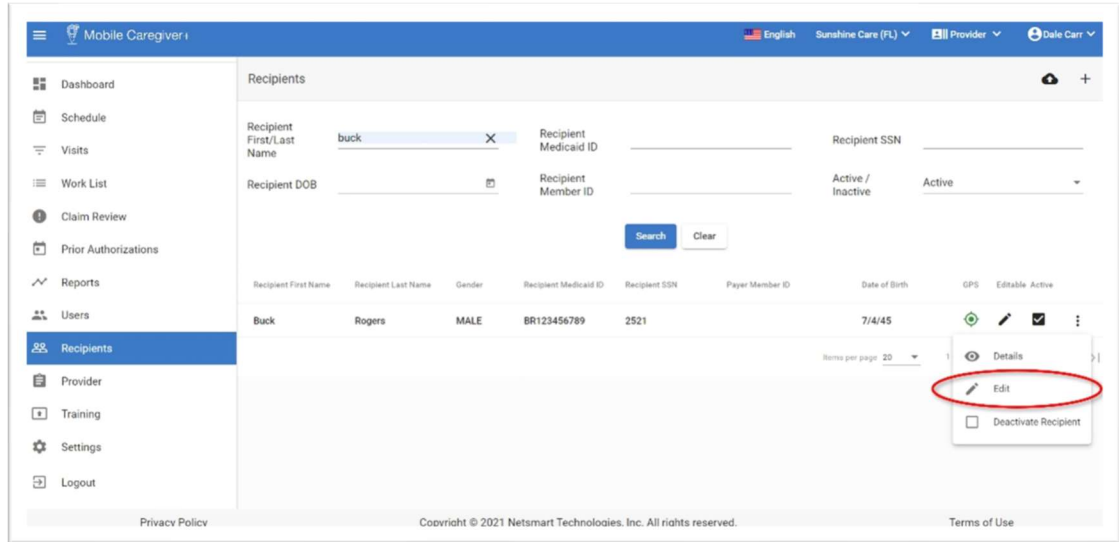
Depending on the Payer, a Recipient may be actively enrolled in multiple waiver programs offered by a single Payer. The Mobile Caregiver+ Claims Console's Payer Subscriptions tab allows Providers to add multiple Plan/Program for a Recipient's Mobile Caregiver+ EVV profile.

Disclaimer: *This option will NOT be available for Recipients whose MCG+ profile data are "auto-loaded" to the Mobile Caregiver+ Provider Portal via "inbound data feeds from a Payer."*

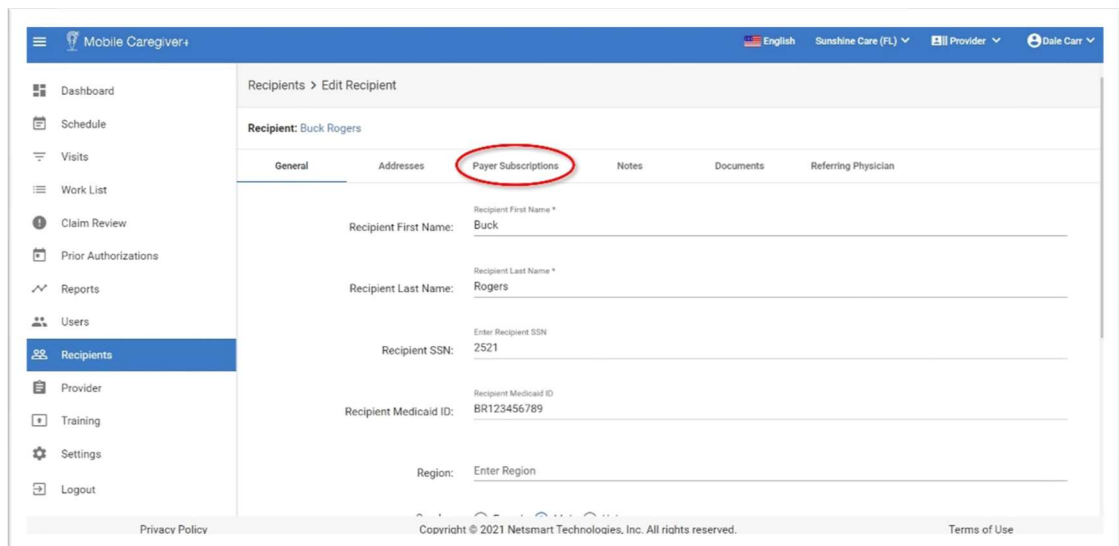
The Payer Subscriptions tab displays a list of all Payers the Recipient is enrolled with.

To Add a new Payer Subscription to a Recipient's Mobile Caregiver+ profile:

- i. From the Main Menu, click **Recipients**.
- ii. Find the Recipient and click on the Actions icon, , for the Recipient whose profile you want to edit.
- iii. From the shortcut submenu, click **Edit**.



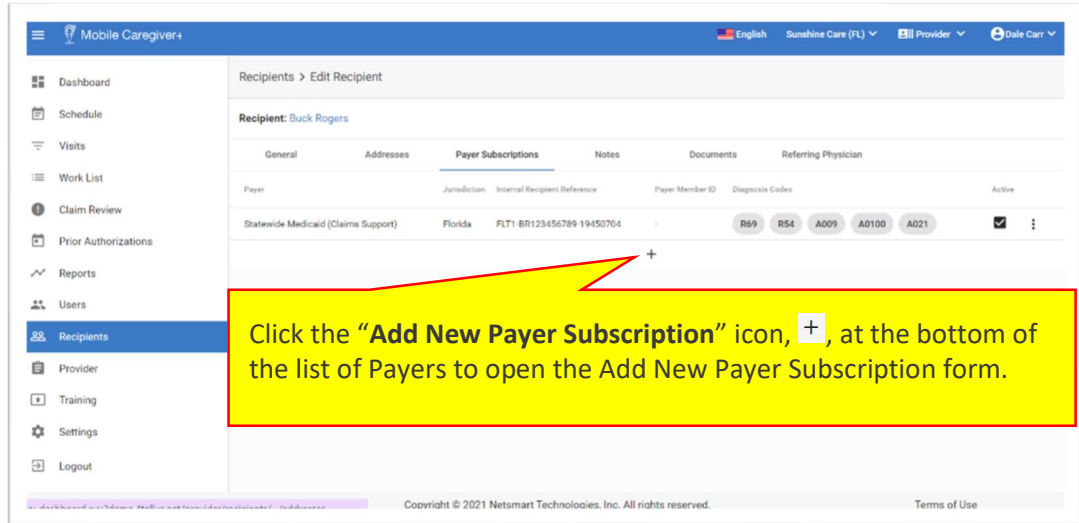
- iv. Click on the **Payer Subscriptions** tab.



Note: The system will automatically display the General tab of the Edit Recipient screen.

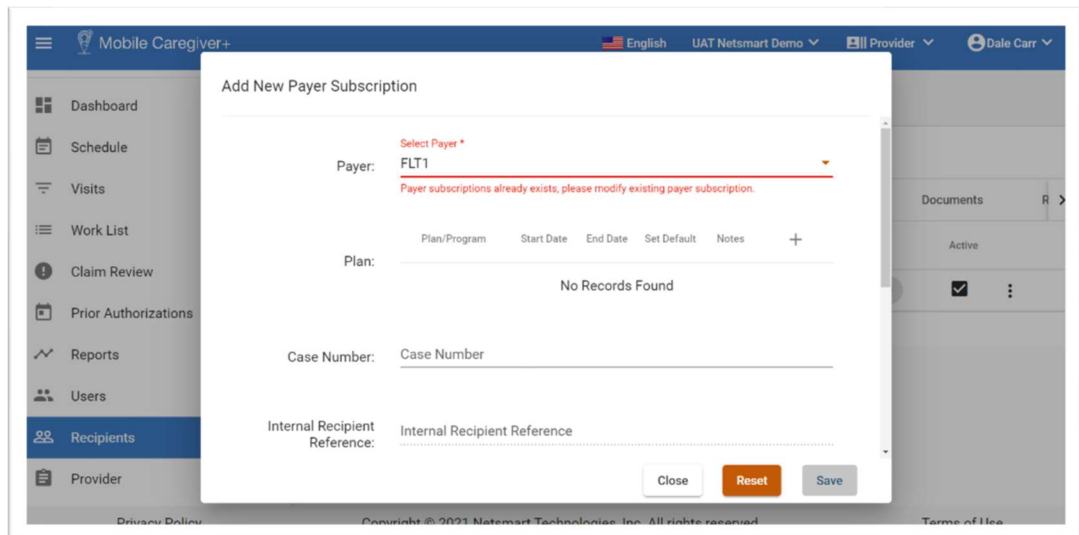


- v. From the subscription tab, click on a Payer’s record to view the details.



Note: The system will display a list of all Payers that the Recipient is enrolled with.

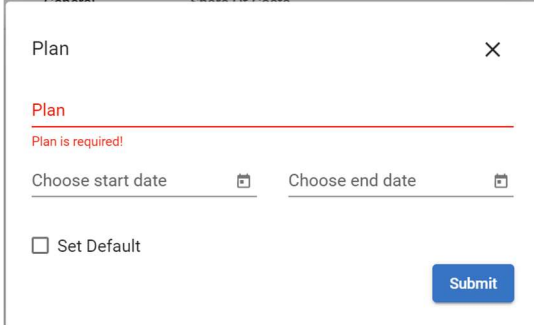
- vi. Click the “Add New Payer Subscription” icon, +, at the bottom of the list of Payers to open the Add New Payer Subscription form.



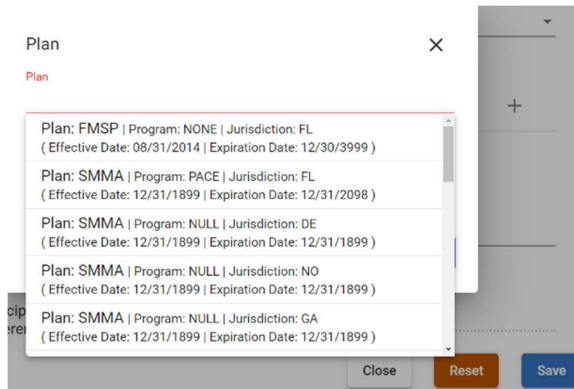
- vii. Click in the **Payer** field to select a Payer.
- viii. Click the **Select Plan/Program** icon, +, to select a Plan/Program in which the Recipient is enrolled.



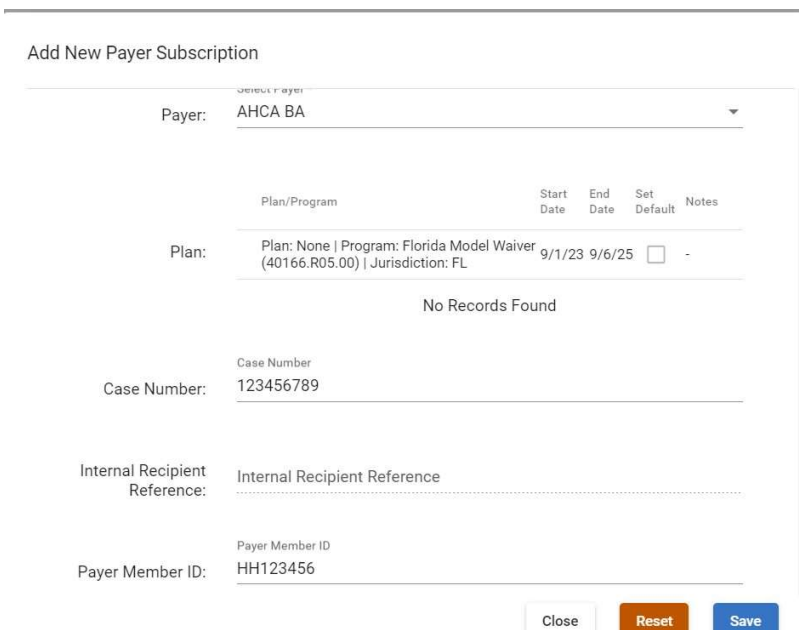
- ix. Click in the **Plan** field to select the Recipient’s subscription Plan for the selected Payer.



- x. From the list, select Plan/Program in which the Recipient is enrolled.



- xi. Enter any other optional subscription data i.e., **Case Number, Payer Member ID, etc.**



Add New Payer Subscription

Payer: AHCA BA

Plan/Program	Start Date	End Date	Set Default	Notes
Plan: None Program: Florida Model Waiver (40166.R05.00) Jurisdiction: FL	9/1/23	9/6/25	<input type="checkbox"/>	-

No Records Found

Case Number: 123456789

Internal Recipient Reference: Internal Recipient Reference

Payer Member ID: HH123456

Close Reset Save

- xii. Scroll down to the bottom of the Add New Payer Subscription form and enter the Recipients Primary Billing Diagnosis and any secondary codes.

Note: The system will retain the billing sequence of Recipients' Diagnosis Codes as displayed in the Recipient's Mobile Caregiver+ profile; the Diagnosis Codes will be populated into rendered service records in the same order as they appear in the Recipient's Mobile Caregiver+ profile


- xiii. Click **Save** when you finish making your entries, or, to clear your entries, click **Reset**.

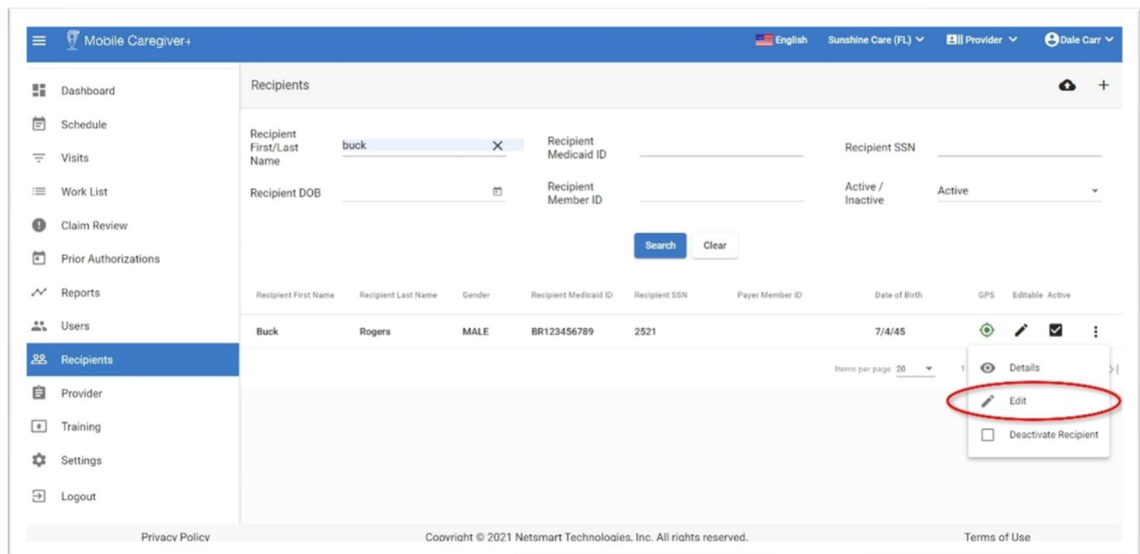
9.10.7. Adding Programs/Plans to Existing Payer Subscriptions

Depending on the Payer, some Recipient may be enrolled in multiple Programs/Plans with a single Payer. The Payer will upload all subscription data for Recipients that are enrolled in multiple Programs/Plans to the Mobile Caregiver+ Provider Portal. The Mobile Caregiver+ Provider Portal allows Provider Admins to select and configure a Recipient’s Mobile Caregiver+ EVV profile with multiple Plans/Programs enrollments for a single Payer.

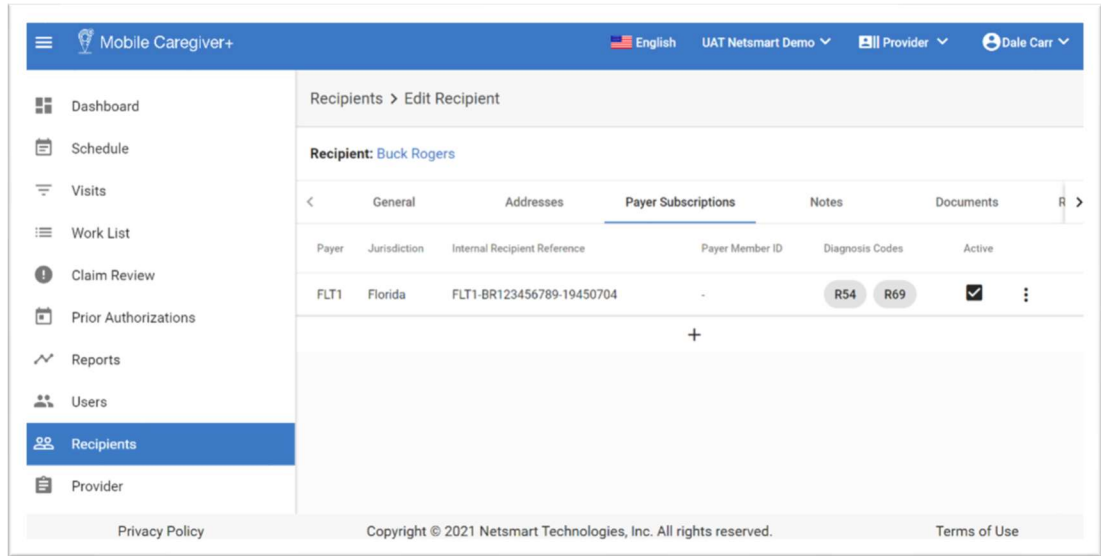
To add a Plan/Program to an existing Payer Subscription:

To edit an existing Payer Subscription Plan:

- i. From the Main Menu, click **Recipients**.
- ii. Locate and click on the Actions icon, , for the Recipient whose profile you want to edit.
- iii. From the shortcut submenu, click **Edit**.

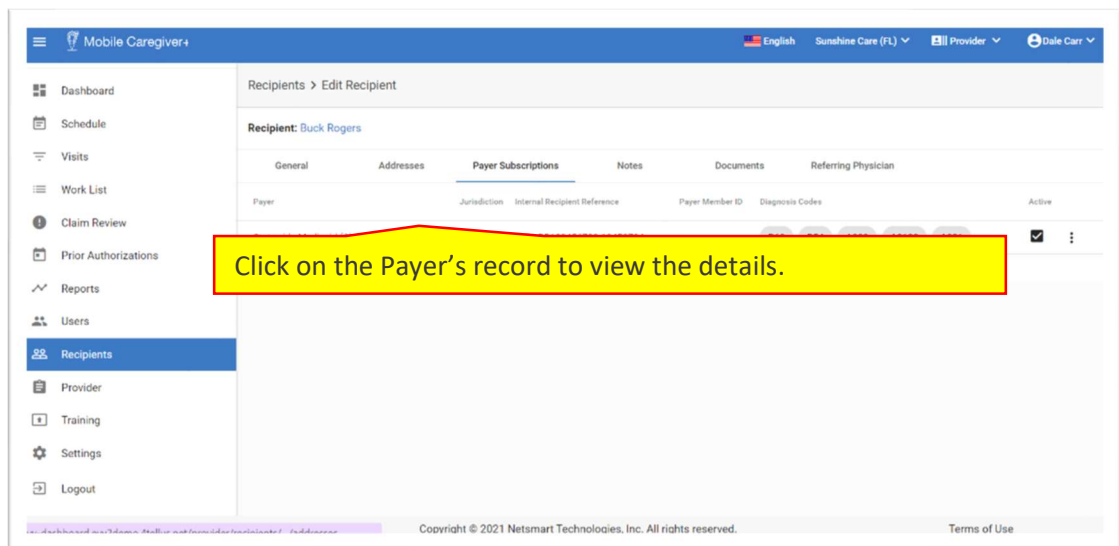


- iv. From the Edit Recipient screen, click on the **Payer Subscriptions** tab.

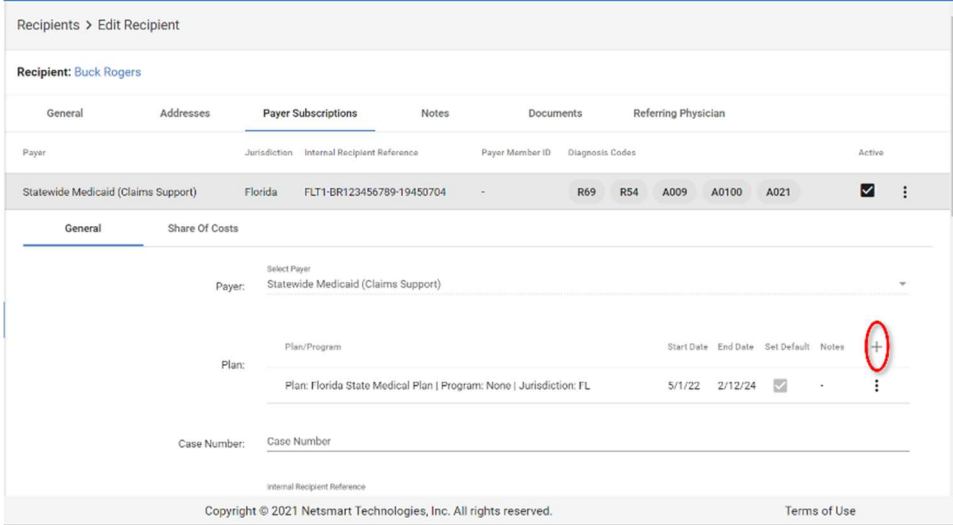


Note: The system will automatically display the General tab of the Edit Recipient screen.

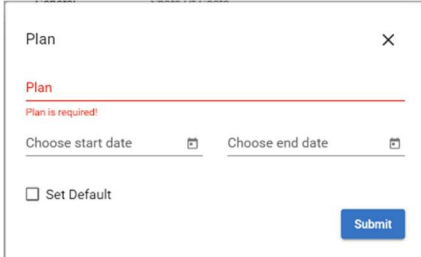
- v. From the subscription tab, click on a Payer's record to view the details.



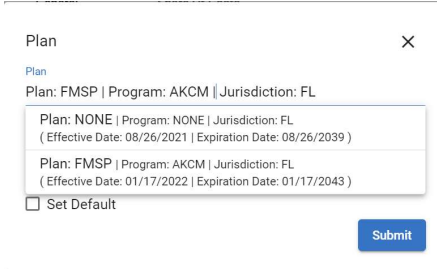
- vi. Click on the Select Plan/Program icon, **+**, to select a Plan/Program that is offered by the selected Payer (Providers can add multiple Plans/Programs that a Recipient is enrolled in with the selected Payer).



vii. Click in the **Plan** field to select a Plan.



viii. From the list, select the Plan/Program you want to add to the Recipient's Mobile Caregiver+ EVV profile.



ix. Enter the start date and end date for the Plan.


x. Click the blue **Submit** command.

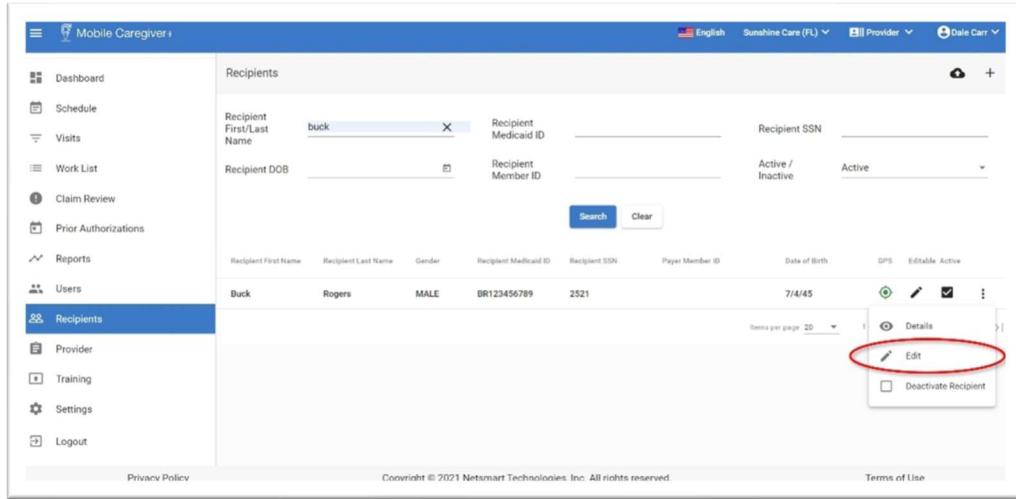
xi. Repeat steps 6 through 10 to add any additional Plan/Program that the Recipient is enrolled in with the selected Payer subscription.

9.10.8. Editing Existing Payer Subscriptions

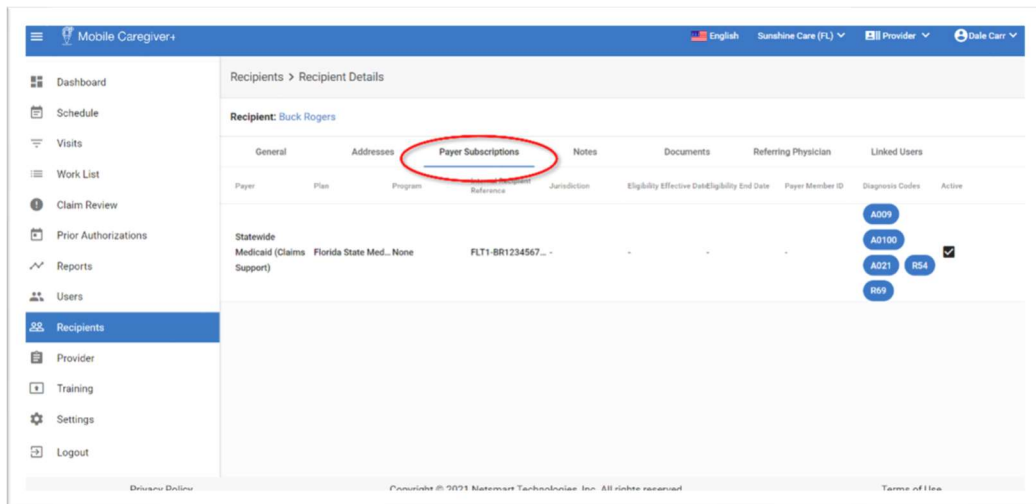
Warning: Provider must contact Netsmart Client Support.

To edit an existing Payer Subscription Plan:

- i. From the Main Menu, click **Recipients**.
- ii. Locate and click on the Actions icon, , for the Recipient whose profile you want to edit.
- iii. From the shortcut submenu, click **Edit**.



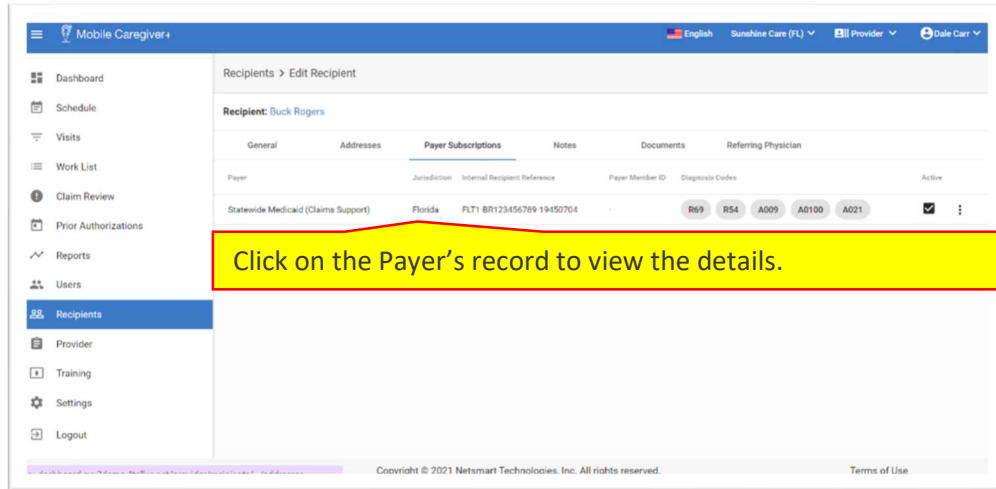
- iv. From the Edit Recipient screen, click on the **Payer Subscriptions** tab.



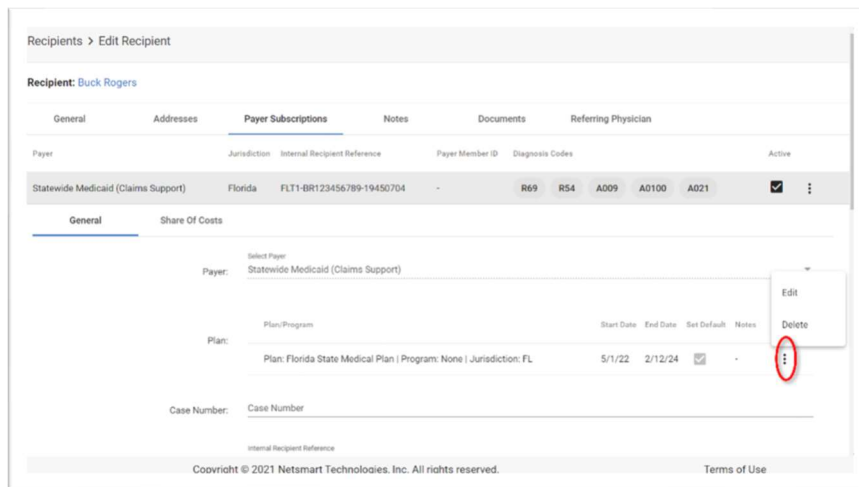
Note: The system will automatically display the General tab of the Edit Recipient screen.

- v. From the subscription tab, click Payer's record to view the details.





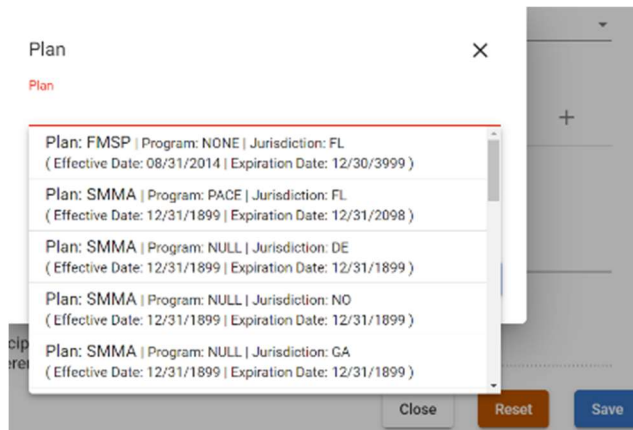
- vi. From the General tab of the Plan details, click on the Actions icon, ⋮, for the existing Plan you want to edit.
- vii. From the shortcut submenu, click **Edit**.



- viii. Click in the **Plan** field to select a different Plan.



- ix. From the list, select the Plan.

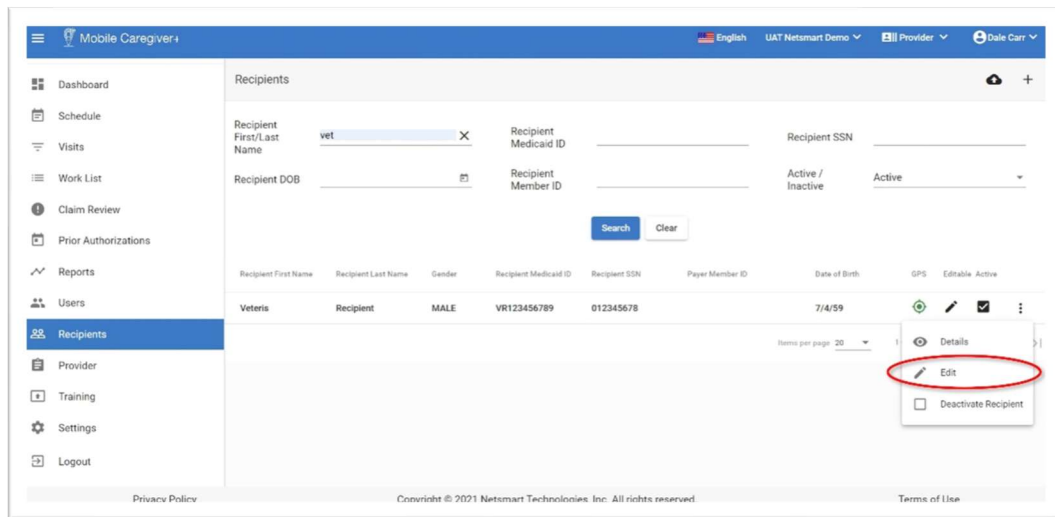


- x. You can edit the start date and/or end dates for the Plan.
- xi. Click the blue **Submit** command.

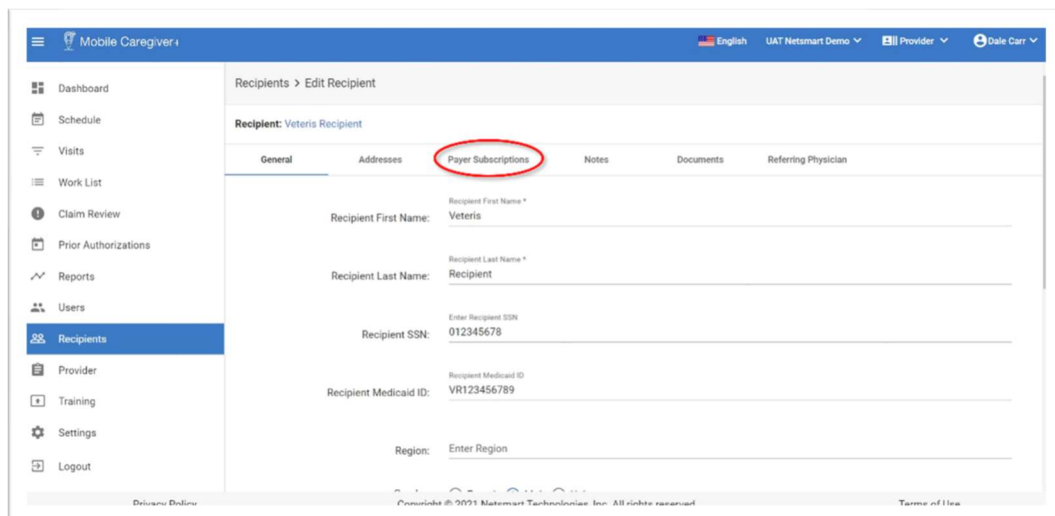
9.10.9. Updating a Recipient's Recipient Diagnosis Code(s)

To edit a Recipient's Diagnosis Codes:

- i. From the Main Menu, click **Recipients**.
- ii. Find the Recipient and click on the Actions icon, ⋮, for the Recipient whose profile you want to edit.
- iii. From the shortcut submenu, click **Edit**.

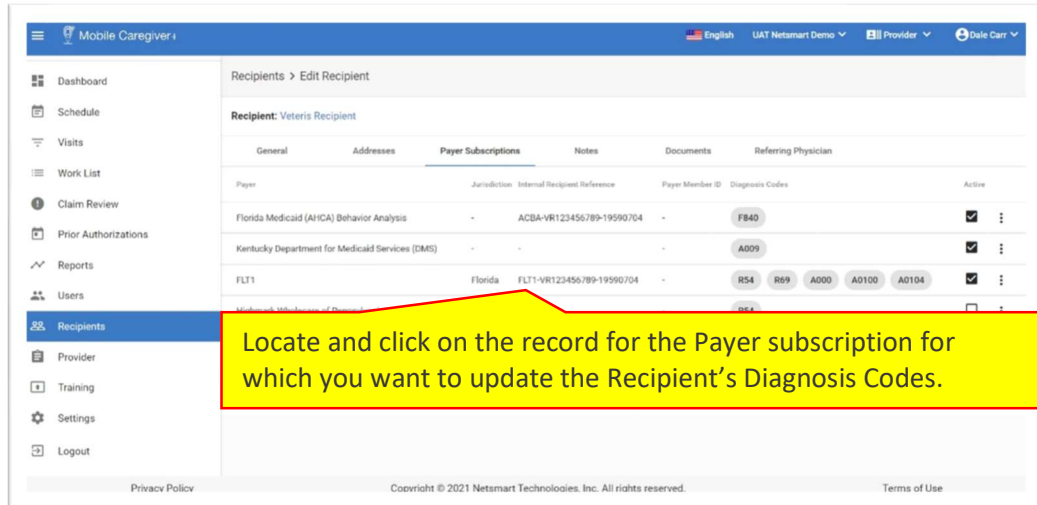


- iv. From the Edit Recipient screen, click on the **Payer Subscription** tab.

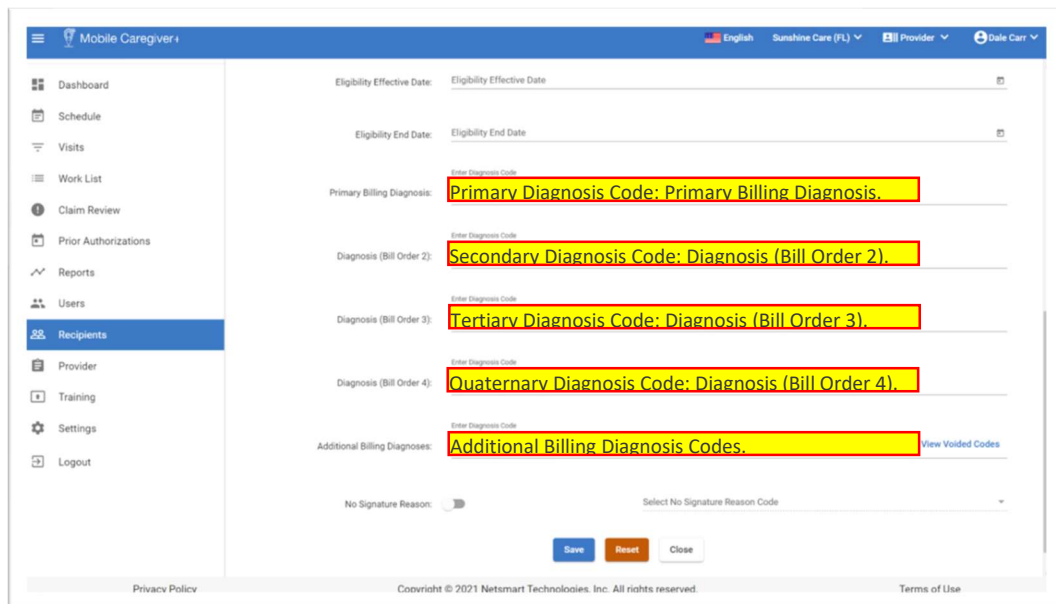


Note: The system will automatically display the General tab of the Edit Recipient screen.

- v. Locate and click on the record for the Payer subscription for which you want update the Recipient's Diagnosis Codes.



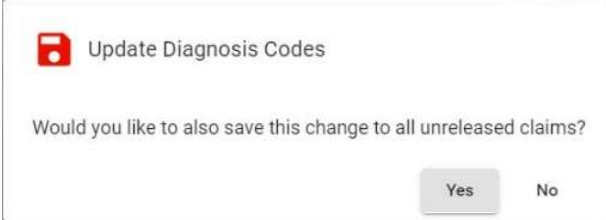
- vi. Enter the Recipients Primary Billing Diagnosis and any secondary codes.
- vii. Use the Additional Billing Diagnosis code field if you need to enter more than four Diagnosis Codes.



Note: The system will retain the billing sequence of Recipients' Diagnosis Codes as listed in the Recipient's Mobile Caregiver+ profile; the Diagnosis Codes will be populated into rendered service records in the same order as they appear in the Recipient's Mobile Caregiver+ profile.



viii. Click **Save** when you finish making your entries, or, click **Reset** to clear the changes you have made.



Update Diagnosis Codes

Would you like to also save this change to all unreleased claims?


Yes No

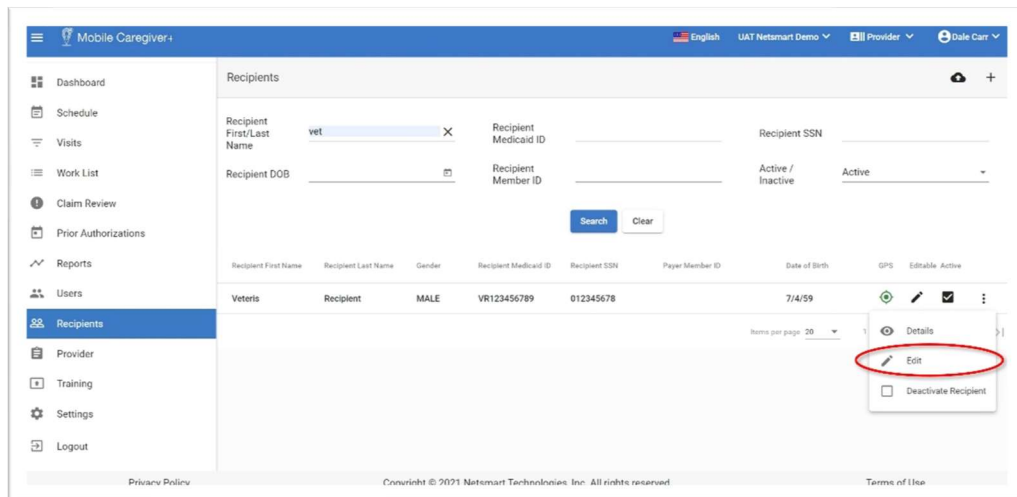
Note: The system will prompt you to save the change(s) “to all unreleased claims.” Clicking “Yes” will automatically update the Diagnosis Code(s) for all unreleased service records that are currently in the Work List.

9.10.10. Viewing a Recipient's Voided Diagnosis Codes

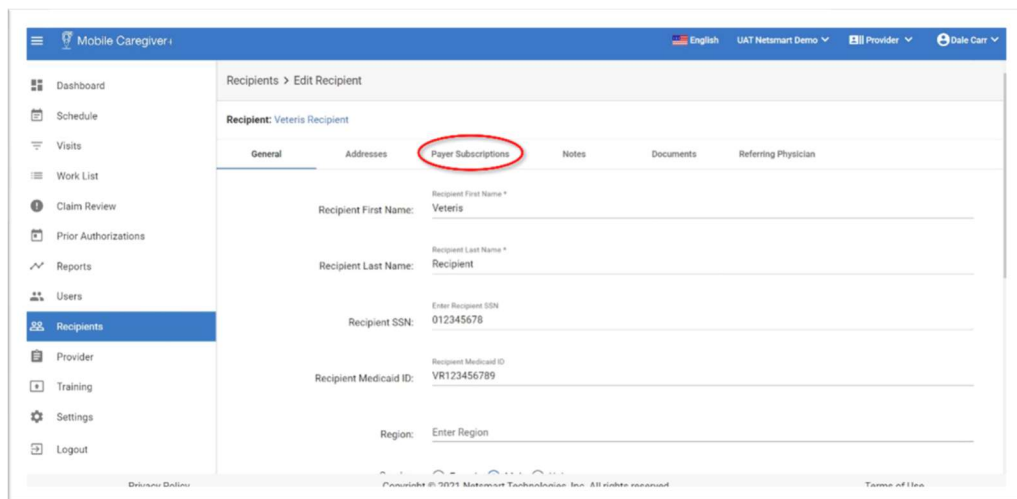
The Mobile Caregiver+ Provider Portal will automatically void and will not allow Providers to add any invalid and/or non-ICD10 Diagnosis Codes to Recipients' Mobile Caregiver+ EVV profiles.

To view Diagnosis Codes that have been voided for a Recipient:

- i. From the Main Menu, click **Recipients**.
- ii. Find the Recipient and click on the Actions icon, , for the Recipient whose voided Diagnosis Codes you want to view.
- iii. From the shortcut submenu, click **Edit**.

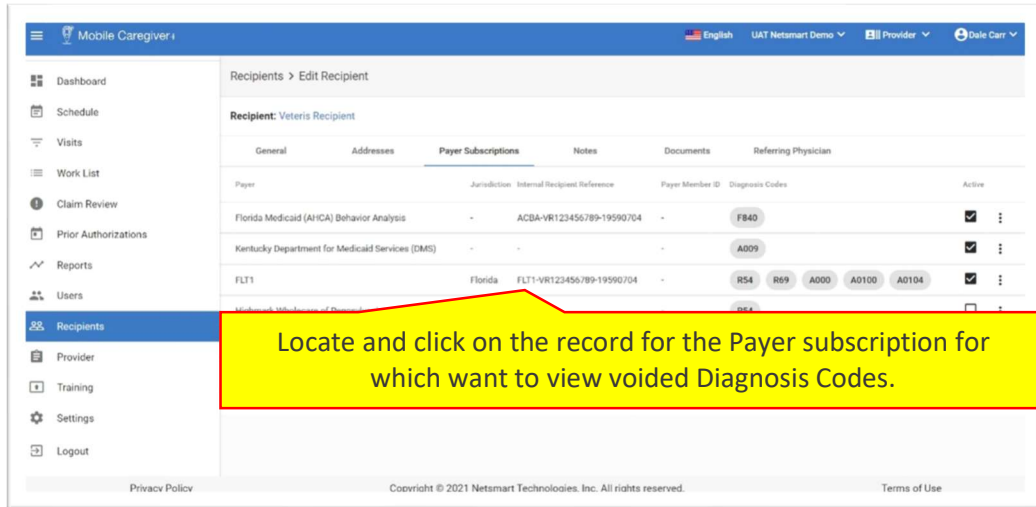


- iv. From the Edit Recipient screen, click on the **Payer Subscription** tab.

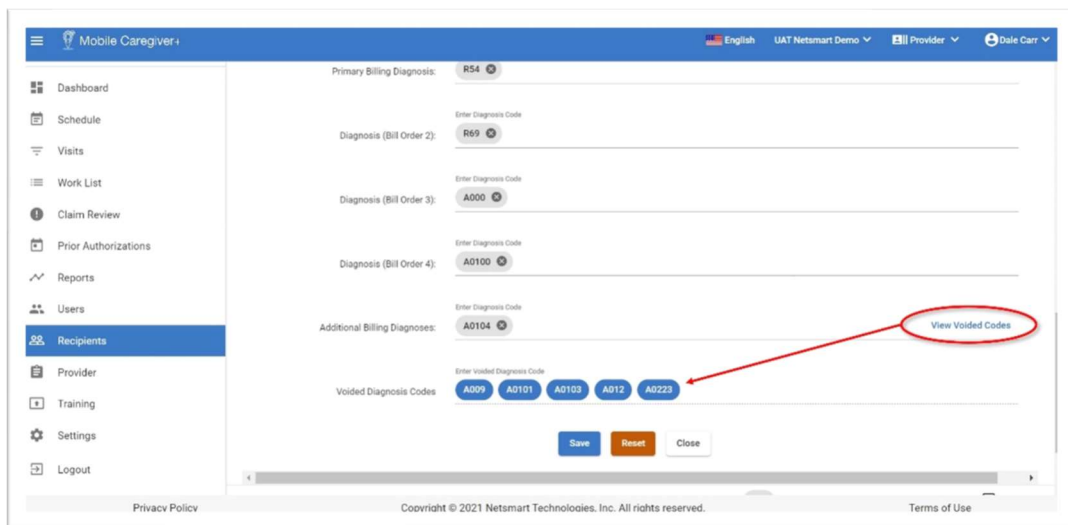


Note: The system will automatically display the General tab of the Edit Recipient screen.

- v. Click on the **Payer Subscriptions** tab.
- vi. Locate and click on the record for the Payer subscription for which you want to view voided Diagnosis Codes.



- vii. Click on the **View Voided Codes** command to view a list of invalid Diagnosis Codes that have been voided from the Recipient's MCG+ EVV profile.




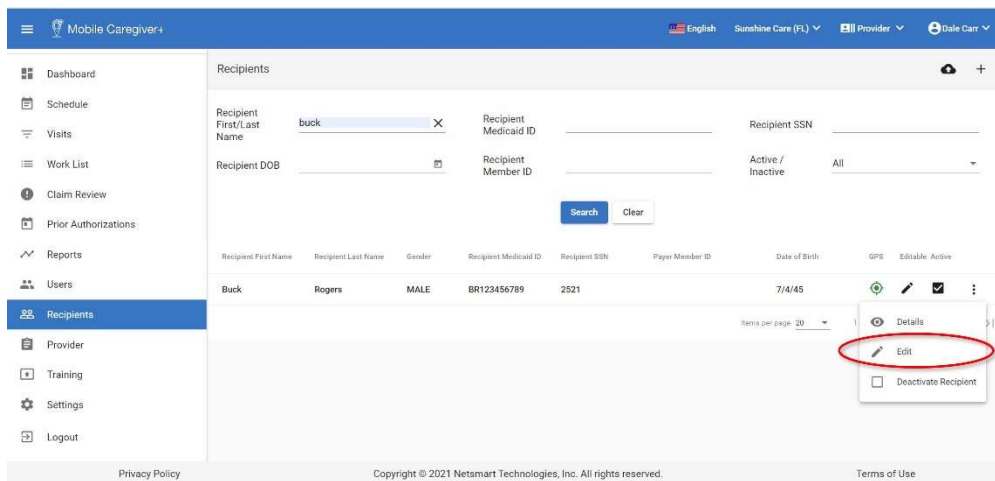
9.10.11. Deactivating a Recipient's Payer Subscription

Warning: Provider must contact Netsmart Client Support.

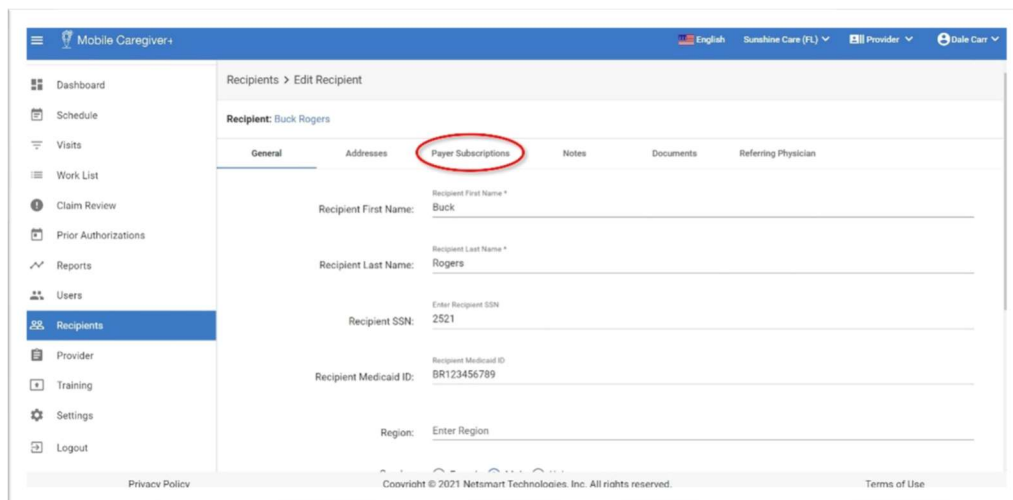
In situations where Providers are no longer authorized to bill Payers for services for Recipients (for example, they fail to recertify), Provider can deactivate Recipients' Payer Subscriptions.

To deactivate a Recipient's Payer Subscription:

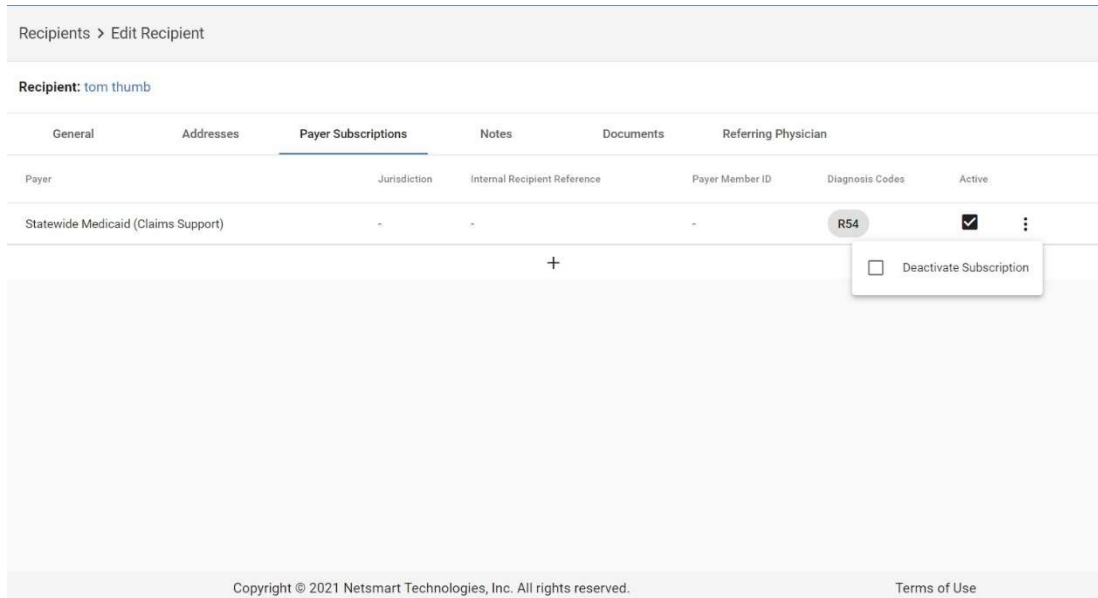
- i. From the Main Menu, click on **Recipients**.
- ii. Locate, and click on the Actions icon, , for Recipient whose Payer Subscription you want to deactivate.
- iii. From the shortcut submenu, click **Edit**.



- iv. From the Edit Recipient screen, click on the **Payer Subscriptions** tab.



- v. From the Payer Subscriptions tab, located and click on the Actions icon , ⋮, for the Payer whose Subscription you want to deactivate.
- vi. Click in the **Deactivate Subscription** checkbox to deactivate the Recipient’s subscription for the selected Payer.




Note: The system will display a green confirmation message in the lower-right corner of the screen, indicating that the subscription was successfully deactivated.

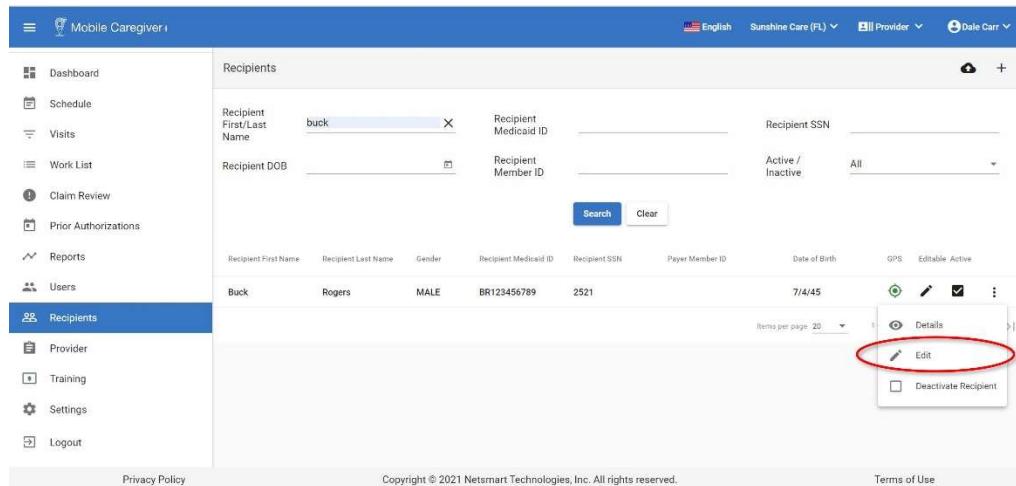
The system will display a checkmark in the Deactivate Subscription checkbox for any Recipient whose subscription has been deactivated.

9.10.12. Reactivating a Recipient's Payer Subscription

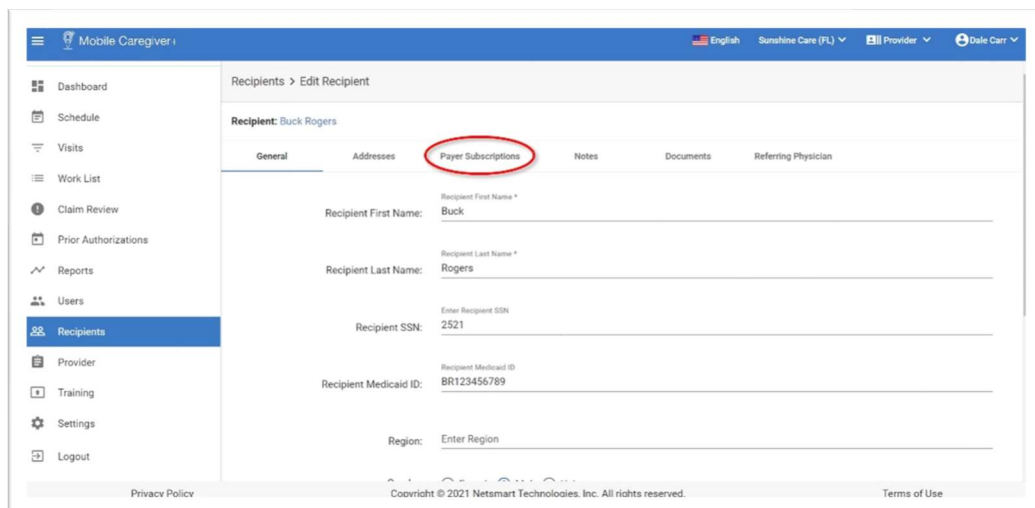
Warning: Provider must contact Netsmart Client Support.

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:

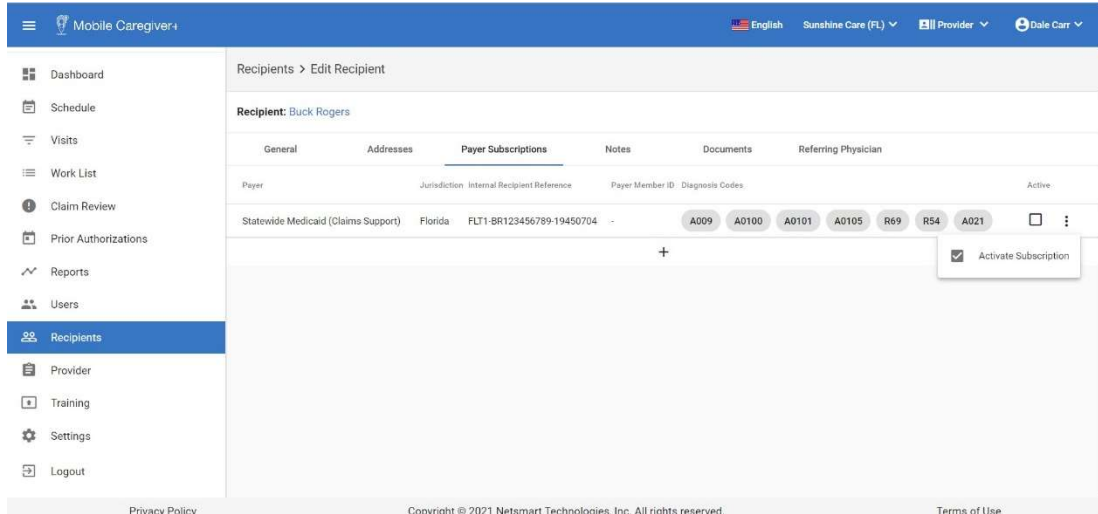
- i. From the Main Menu, click on **Recipients**.
- ii. Locate, and click on the Actions icon, , for Recipient whose Payer Subscription you want to reactivate.
- iii. From the shortcut submenu, click **Edit**.



- iv. From the Edit Recipient screen, click on the **Payer Subscriptions** tab.



- v. From the Payer Subscriptions tab, click on the Actions icon , ⋮, for whose Payer whose Subscription you want to reactivate.
- vi. Click in the **Deactivate Subscription** checkbox to deactivate the Recipient’s subscription for the selected Payer -



The system will display a green confirmation message in the lower-right corner of the screen, indicating that the subscription was successfully deactivated.


The system will display a checkmark in the Deactivate Subscription checkbox for any Recipient whose subscription has been deactivated.

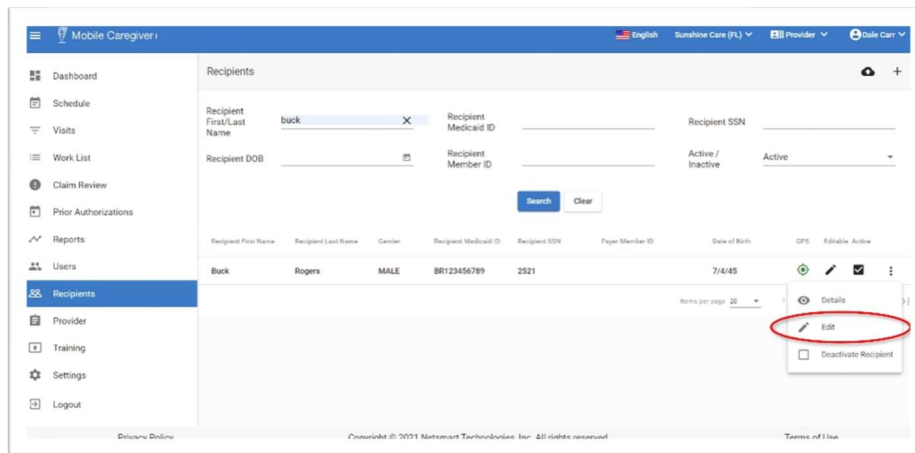


9.10.13. Adding Notes to Recipients' MCG+ Profiles

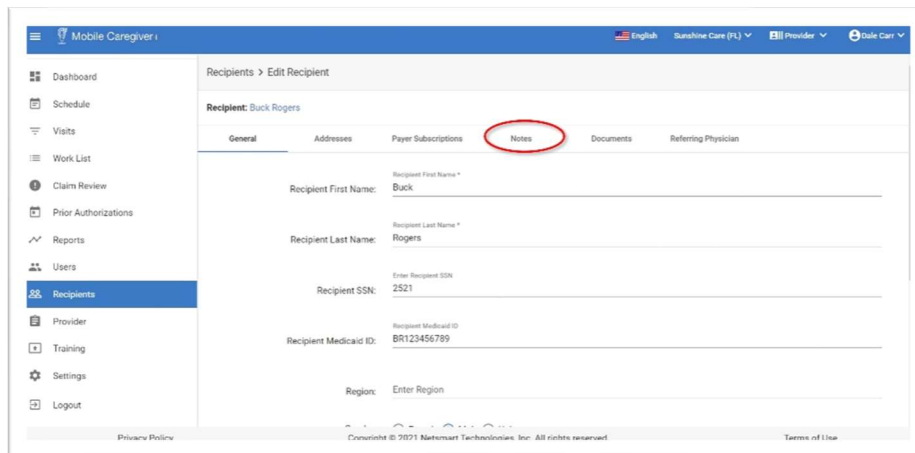
Provider Admins have can add and manage notes in Recipients' Mobile Caregiver+ EVV profiles. Caregivers have access rights to download and view documents stored in Recipients' Mobile Caregiver+ profiles via the mobile application.

To add a note to a Recipient's Mobile Caregiver+ profile:

- i. From the Main Menu, click **Recipients**.
- ii. Locate and click on the Actions icon, , of the Mobile Caregiver+ Recipient profile to which you want to add a note.
- iii. From the shortcut submenu, click **Edit**.

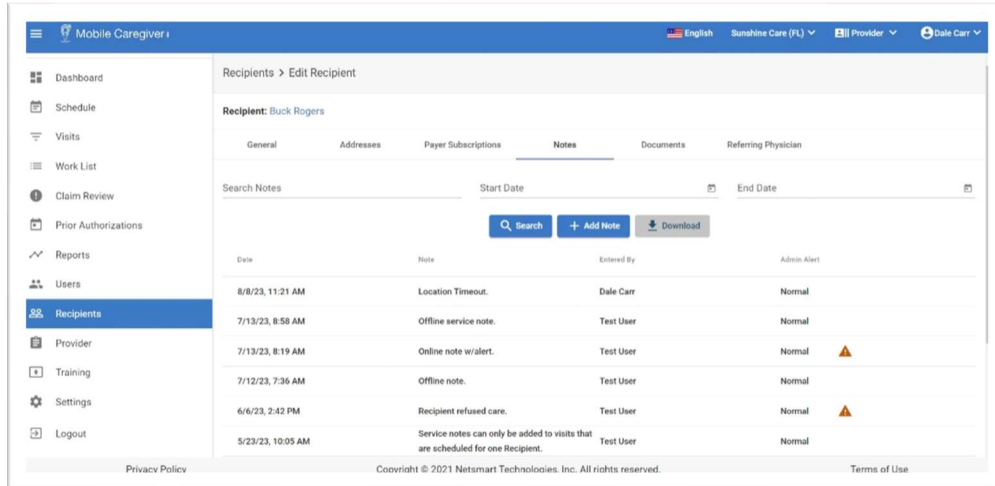


- iv. Click on the **Notes** tab.




Note: The system will automatically display the General tab of the Edit Recipient screen.

- v. To add a new note, click on the blue **Add Note** command.

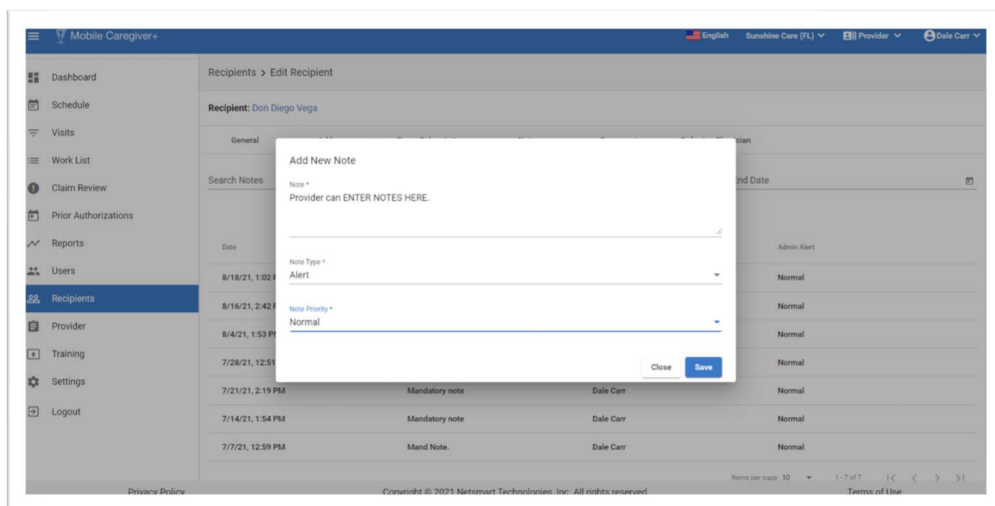


Notes: The system will display a list of notes that have been added to the Recipient's Mobile Caregiver+ profile.

Notes displaying a yellow triangle, , are Caregiver notes, that were sent as alerts, from the Mobile Caregiver+ Mobile Application.

*Providers can search or filter for note entries by keyword(s) and date range. Providers can enter keyword(s) in the **Search Notes** field and/or enter a **Start Date** and **End Date** to filter the list. Providers can sort the list by clicking any of the column headings.*

- vi. Enter the new note using the **Add New Note** dialog box.



- **Note***: Type the note in the Note field. This is a mandatory field (you must enter at least one character).
- **Note Type***: Select the Note Type. This is a mandatory field.



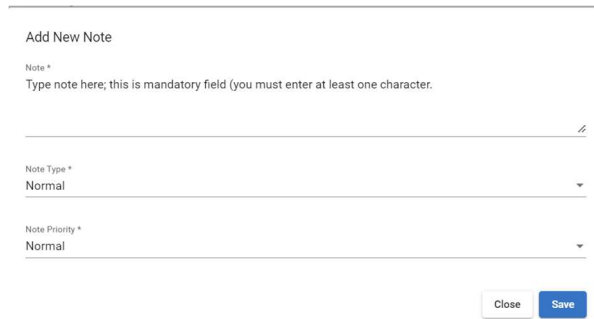
A screenshot of a dropdown menu for the 'Note Type' field. The menu is open, showing a list of options: 'None' (highlighted in blue), 'Alert', and 'Normal'.

- **Note Priority***: Select the Note Priority. This is a mandatory field.



A screenshot of a dropdown menu for the 'Note Priority' field. The menu is open, showing a list of options: 'None' (highlighted in blue), 'Bottom', 'High', 'Low', and 'Normal'.

- vii. Click the blue **Save** command to add the new note to the Recipient's Mobile Caregiver+ profile.




A screenshot of the 'Add New Note' form. The form contains the following fields and controls:

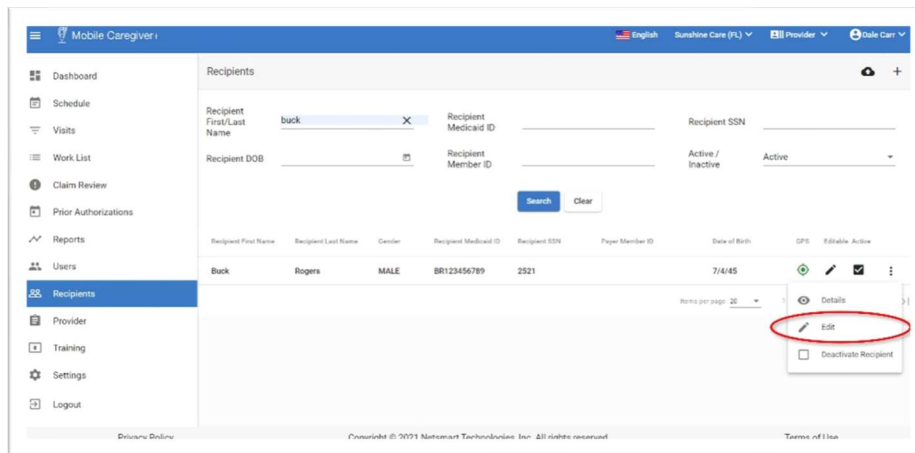
- Note ***: A text input field with a placeholder text: "Type note here; this is mandatory field (you must enter at least one character)." and a clear icon (X) on the right.
- Note Type ***: A dropdown menu with 'Normal' selected.
- Note Priority ***: A dropdown menu with 'Normal' selected.
- At the bottom right, there are two buttons: 'Close' and 'Save'.

9.10.14. Viewing Notes in a Recipients' MCG+ Profiles

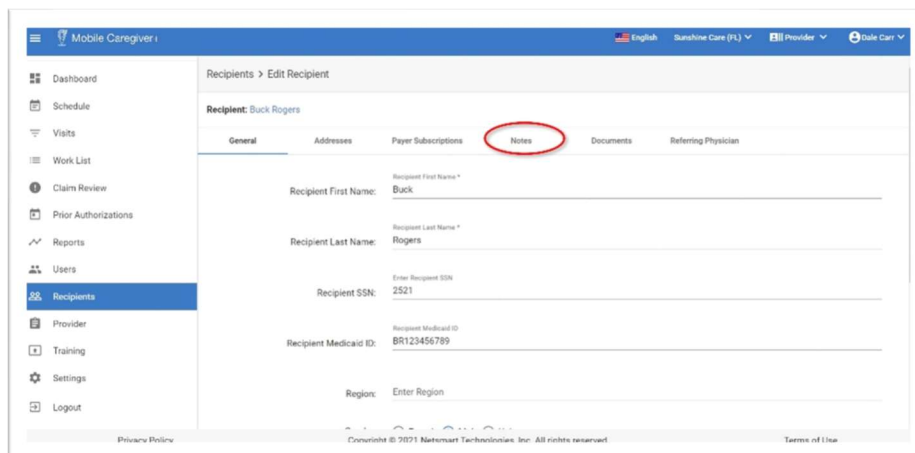
Provider Admins have can add and manage notes in Recipients' Mobile Caregiver+ EVV profiles. Caregivers have access rights to download and view documents stored in Recipients' Mobile Caregiver+ profiles via the mobile application.

To add a note to a Recipient's Mobile Caregiver+ profile:

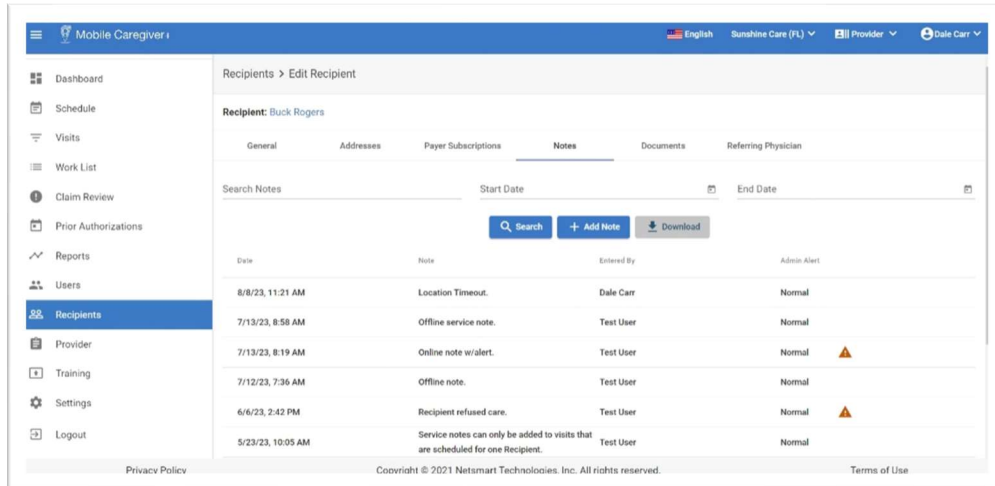
- i. From the Main Menu, click **Recipients**.
- ii. Locate and click on the Actions icon, , of the Mobile Caregiver+ Recipient profile to which you want to add a note.
- iii. From the shortcut submenu, click **Edit**.




- iv. To view the notes in a Recipient's Mobile Caregiver+ profile, click on the **Notes** tab.



Note: The system will automatically display the General tab of the Edit Recipient screen.



Notes: The system will display a list of notes that have been added to the Recipient's Mobile Caregiver+ profile.


Notes displaying a yellow triangle, , are Caregiver notes, sent as alerts, from the Mobile Caregiver+ Mobile Application.

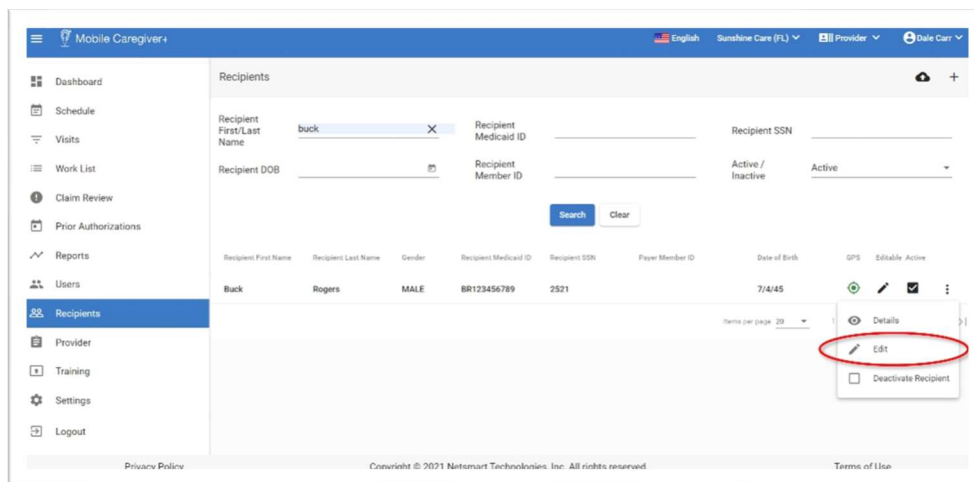
*Providers can search or filter for note entries by keyword(s) and date range. Providers can enter keyword(s) in the **Search Notes** field and/or enter a **Start Date** and **End Date** to filter the list. Providers can sort the list by clicking any of the column headings.*

9.10.15. Adding Documents to Recipients' MCG+ Profiles

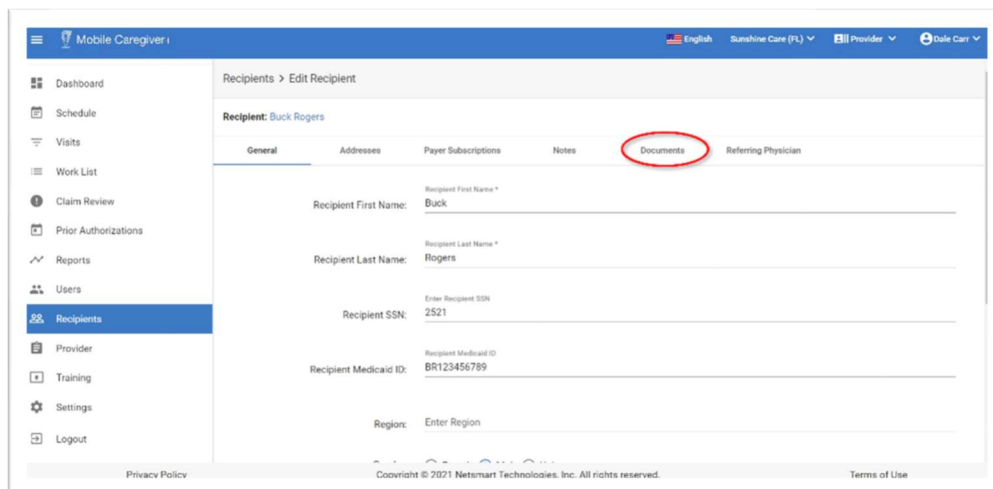
Providers can add documents to, and manage documents in, Recipients' Mobile Caregiver+ profiles. Caregivers have access rights to download and view documents stored in Recipients' Mobile Caregiver+ profiles via the mobile application.

To add a new document to a Recipient's Mobile Caregiver+ profile:

- i. From the Main Menu, click **Recipients**.
- ii. Find the Recipient and click on the Actions icon, , for the Recipient whose documents you want to manage or view.
- iii. From the shortcut submenu, click **Edit**.

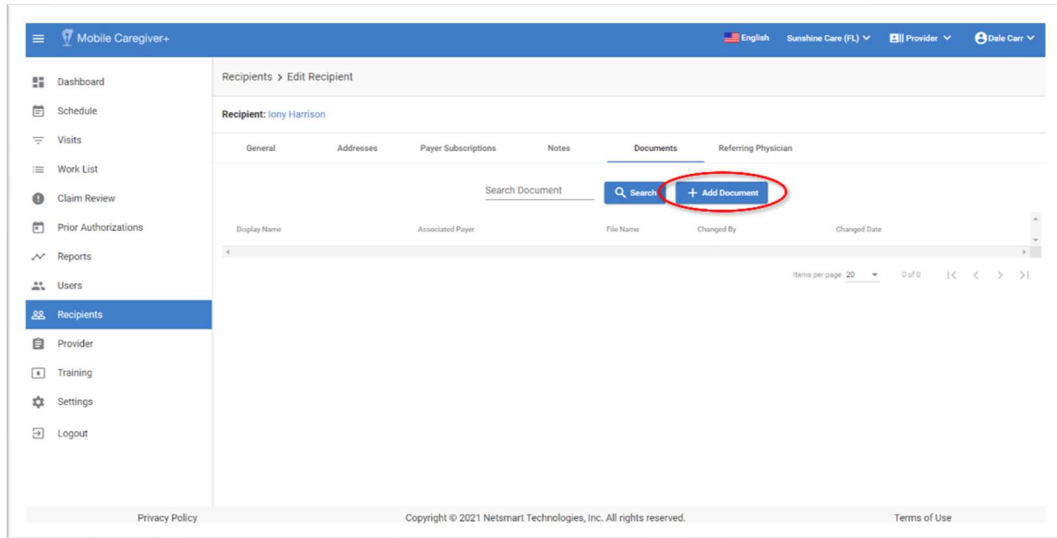


- iv. Click on the **Documents** tab.



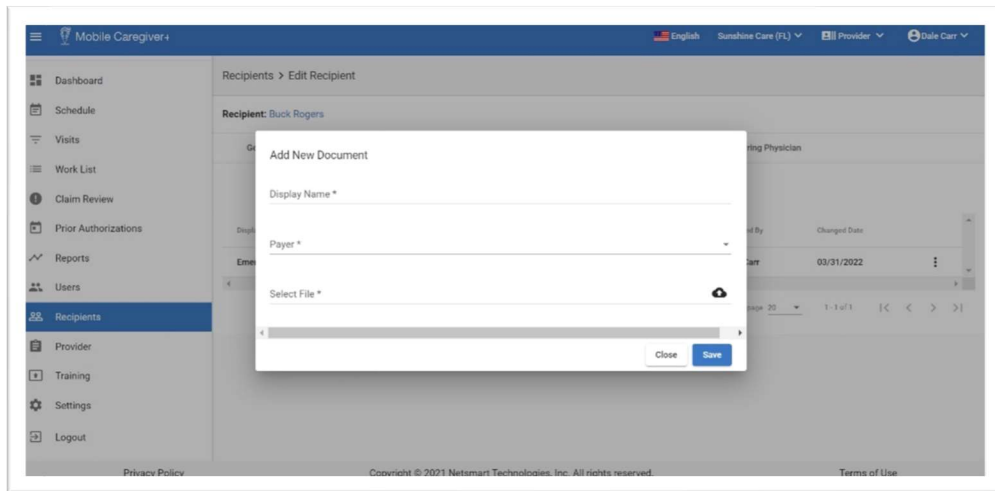
Note: The system will automatically display the General tab of the Edit Recipient screen.

- v. Click on the blue **Add Document** command to add a new document to the Recipient’s Mobile Caregiver+ profile.

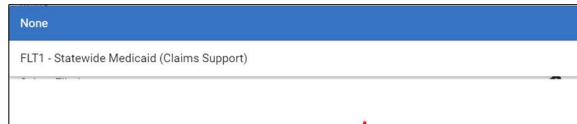



*Note: The system will display a list of documents that have been added to the Recipient’s Mobile Caregiver+ profile. Providers can search/filter documents by keyword(s). Provide can enter keyword(s) in the Search Document field and click the blue **Search** command. Provider can sort the list by clicking any of the column headings.*

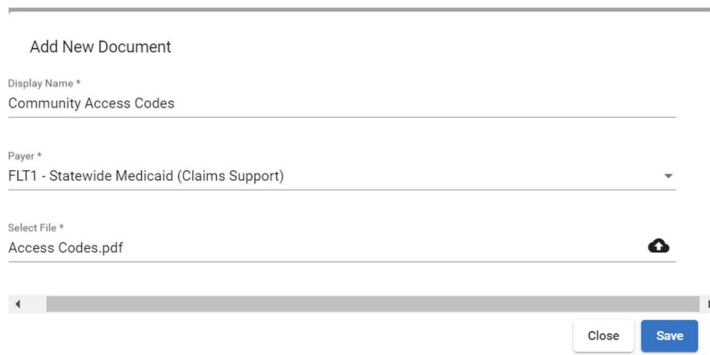
- vi. Add the new note using the **Add New Document** dialog box.



- **Display Name***: Type the name that will be displayed for the document in the Mobile Caregiver+ Provider Portal.
- **Payer***: Select the Payer that the Recipient is enrolled with. This is a mandatory field.




- **Select File***: Click on the upload icon, , in the Select File field to locate and select the file to be uploaded to the Recipient's Mobile Caregiver+ profile.
- vii. Click the blue **Save** command to add the new document to the Recipient's Mobile Caregiver+ profile.

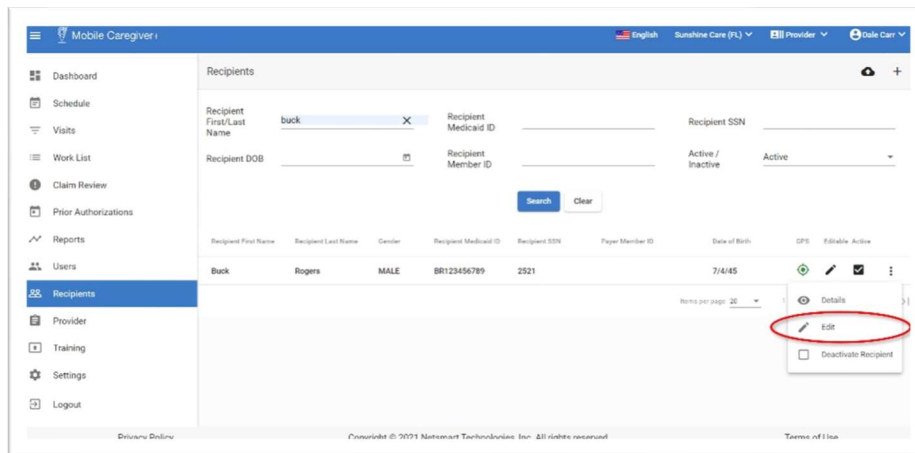


9.10.16. Managing Documents in Recipients' MCG+ Profiles

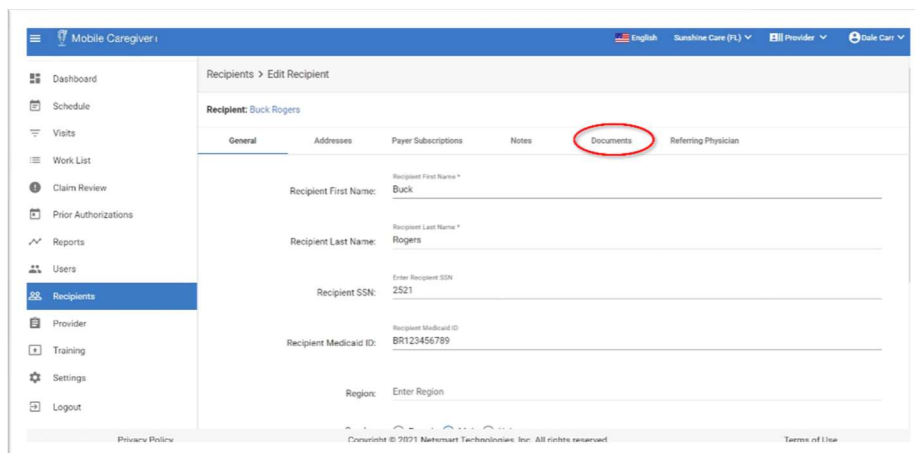
Providers can add documents to, and manage documents in, Recipients' Mobile Caregiver+ profiles. Caregivers have access rights to download and view documents stored in Recipients' Mobile Caregiver+ profiles via the mobile application.

To manage or view documents in a Recipient's Mobile Caregiver+ profile:

- i. From the Main Menu, click **Recipients**.
- ii. Find the Recipient and click on the Actions icon, , for the Recipient whose documents you want to manage or view.
- iii. From the shortcut submenu, click **Edit**.



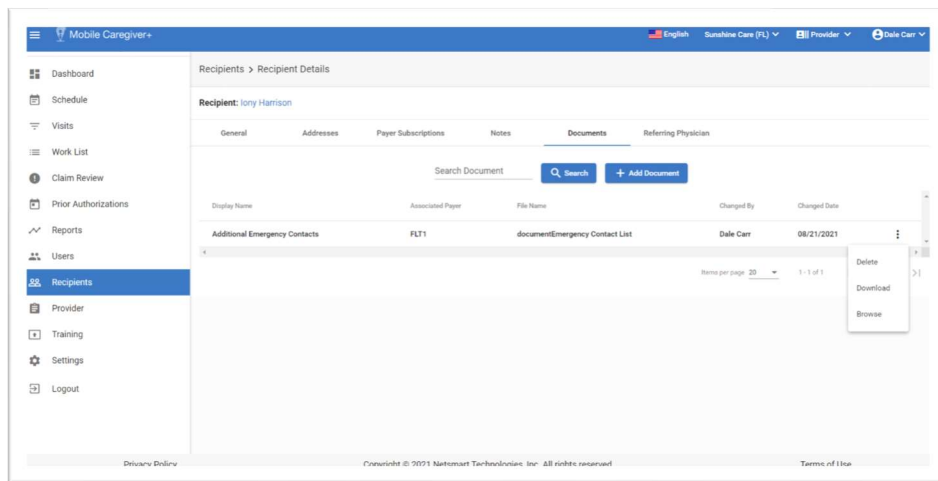
- iv. Click on the **Documents** tab.



Note: The system will automatically display the General tab of the Edit Recipient screen.

*Providers can search/filter for note entries by keyword(s). Providers can enter keyword(s) in the Search Notes field and click the blue **Search** command. Providers can sort the list by clicking any of the column headings.*

- v. Click on the blue Actions icon, , next to the document you want to manage.



Note: the system will display a list of documents that have been added to the Recipient's Mobile Caregiver+ profile.

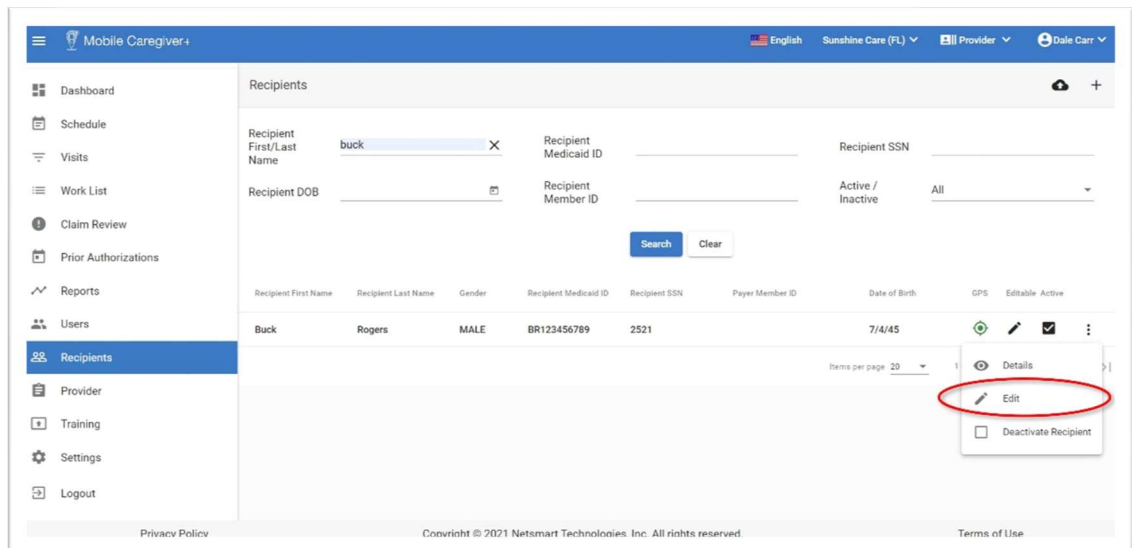
- vi. From the shortcut submenu, Providers can select one of the following management options:
 - **Delete** – To delete the document.
 - **Download** – To download the document.
 - **Browser** – To view the details for the document.

9.10.17. Adding a New Referring Physician to a Recipient's MCG+ Profile

Providers can add referring physician data for Recipients that require Referring Physicians for designated services; the Referring Physicians tab allows Providers to add new Mobile Caregiver+ Referring Physician profiles to the Mobile Caregiver+ Provider Portal, as well as select and link Recipients to existing Mobile Caregiver+ Referring Physicians profiles.

To add a new Mobile Caregiver+ Referring Physician profile to the Mobile Caregiver+ Provider Portal:

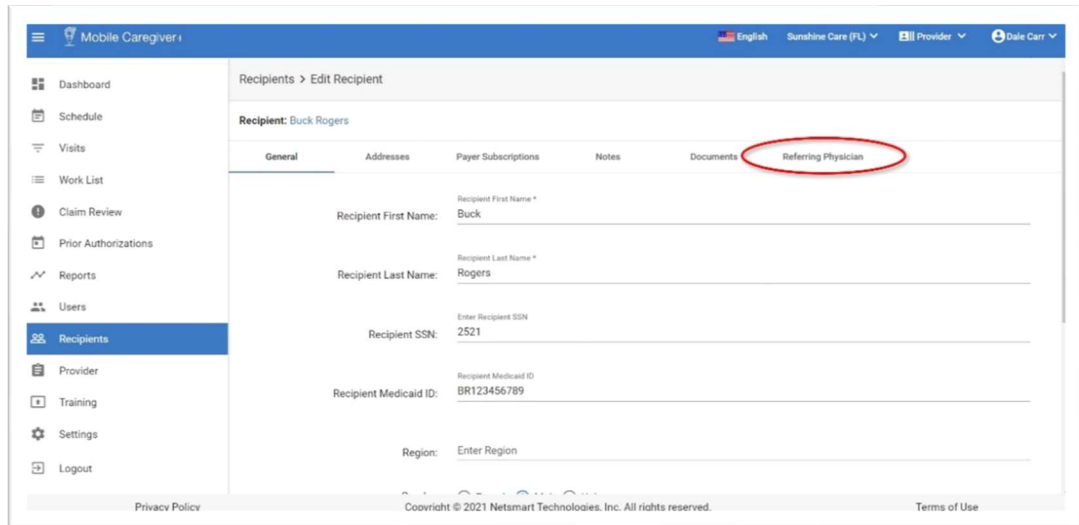
- i. From the Main Menu, click **Recipients**.
- ii. Locate the Mobile Caregiver+ Recipient profile to which you want to add a Referring Physician.
- iii. Click on the Actions icon, ⋮.



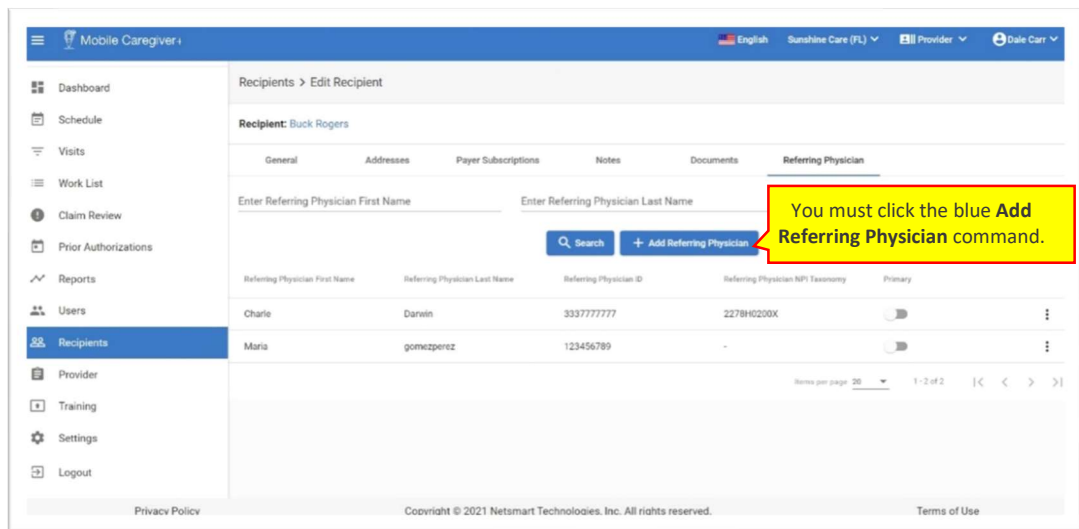
- iv. From the shortcut submenu, click **Edit**.

Note: The system will automatically display the General tab of the Edit Recipient screen.

- v. Click on the **Referring Physician** tab.



- vi. To add a new Referring Physician to a Recipient's Mobile Caregiver+ profile, you must click the blue **Add Referring Physician** command.



When adding new Referring Physicians to the Mobile Caregiver+ Provider Portal, the system requires that Providers first search for any existing records. If there is an existing Mobile Caregiver+ Referring Physician profile record, Providers can simply link Recipients to existing Mobile Caregiver+ Referring Physician profiles.

- vii. To search for an existing Mobile Caregiver+ Referring Physician profile, enter the Referring Physician's partial or full first and/or last name.

viii. Click the blue **Search** Command.

Link Referring Physician
×

Enter Referring Physician First Name

Enter Referring Physician Last Name

Enter Referring Physician ID

ix. Review the search result to see if there is an existing Mobile Caregiver+ Referring Physician profile; if there is an existing record, ensure that the profile data is accurate.

Link Referring Physician
×

Enter Referring Physician First Name

Enter Referring Physician Last Name

Enter Referring Physician ID

i **Referring Physician/s found based on the search parameters**
 Select Referring Physician to be linked with the Recipient

Referring Physician First Name	Referring Physician Last Name	Referring Physician ID	Referring Physician NPI Taxonomy	
Example	Physician	876543211	-	<input type="button" value="Link Physician"/>
Example	Three Physician	555555555	-	<input type="button" value="Link Physician"/>
Example	Two Physician	666666666	-	<input type="button" value="Link Physician"/>

Warning

Be sure to confirm that the Referring Physician's information is accurate before linking a Recipient to an existing Mobile Caregiver+ Referring Physician profile.

Note: The system will automatically display a table listing all Referring Physicians that have already been linked to the Recipient's Mobile Caregiver+ profile.

*If there is an accurate existing Mobile Caregiver+ Referring Physician profile, you can simply click on the **Link Physician** command to link the Recipient to the Referring Physician.*

If there is no existing record for the Referring Physician, they system will automatically display the Link Referring dialog box to allow the User to enter a new Mobile Caregiver+ Referring Physician profile (please skip to step xi).



- x. If there is an existing Mobile Caregiver+ Referring Physician profile that is inaccurate, click on the **Add Different Referring Physician** command.
- xi. Enter the Referring Physician Mobile Caregiver+ profile data in the **Link Referring Physician** form.

Link Referring Physician
×

Change Search Criteria

i

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

Referring Physician First Name *

Referring Physician First Name can only contain letters and/or spaces if more than one name.

Referring Physician Last Name *

Referring Physician Last Name can only contain letters and/or spaces if more than one name.

Referring Physician ID *

Referring Physician ID must be numeric 9 or 10 digits in length.

Referring Physician NPI Taxonomy

Referring Physician NPI Taxonomy should be alphanumeric and no more than 25 characters

Set Referring Physician as Primary

Save
Cancel

- xii. You can click-on (activate) the **Set Referring Physician as Primary** switch to designate this record as the primary Referring Physician.
- xiii. Click the blue **Save** command.

Link Referring Physician
×

Change Search Criteria

i

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

Referring Physician First Name *

Mobile_CaregiverPlus

Referring Physician Last Name *

Referring_Physician

Referring Physician ID *

123456789

Referring Physician NPI Taxonomy

NPI12345678

Set Referring Physician as Primary

Save
Cancel

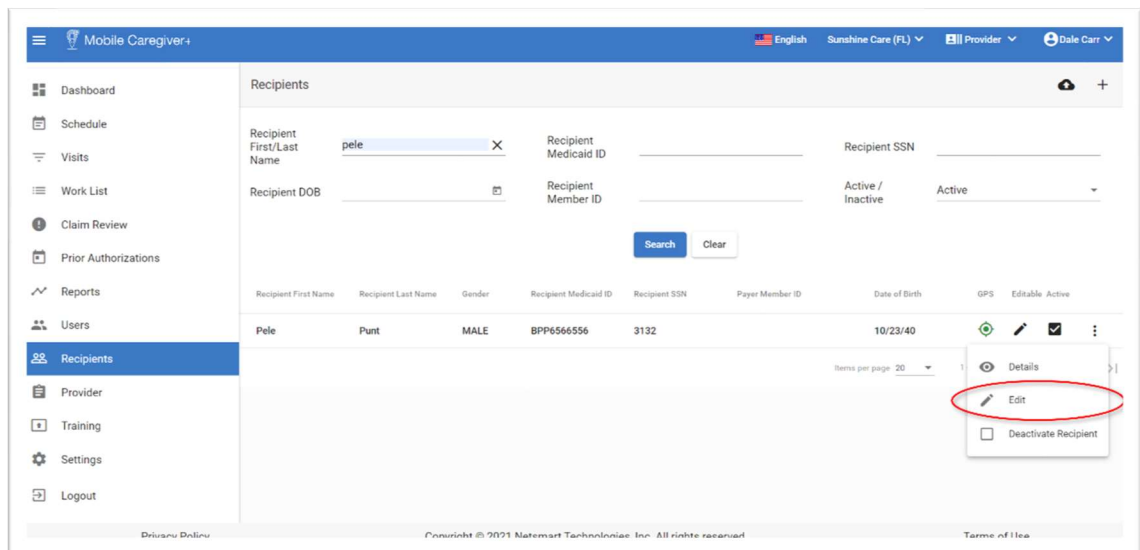


9.10.18. Linking a Recipient to an Existing MCG+ Referring Physician Profile

Providers can add referring physician data for Recipients that require Referring Physicians for designated services; the Referring Physicians tab allows Providers to add new Mobile Caregiver+ Referring Physician profiles to the Mobile Caregiver+ Provider Portal, as well as select and link Recipients to existing Mobile Caregiver+ Referring Physicians profiles.

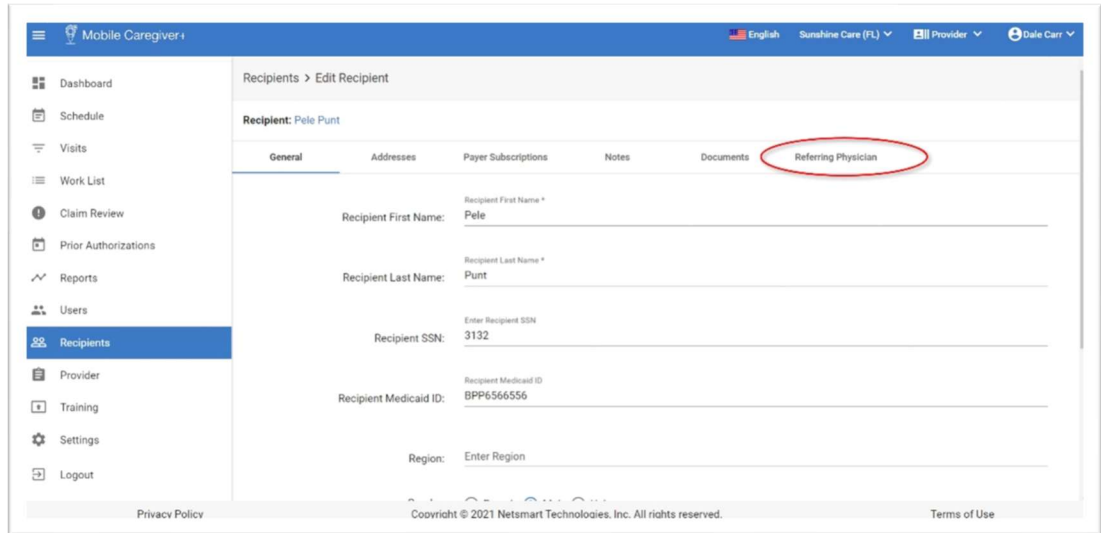
To link a Recipient to an existing Mobile Caregiver+ Referring Physician Profile:

- i. From the Main Menu, click on **Recipients**.
- ii. Locate the Mobile Caregiver+ Recipient profile to which you want to link to an existing Mobile Caregiver+ Referring Physician profile.
- iii. Click on the Actions icon, ⋮.
- iv. From the shortcut submenu, click **Edit**.

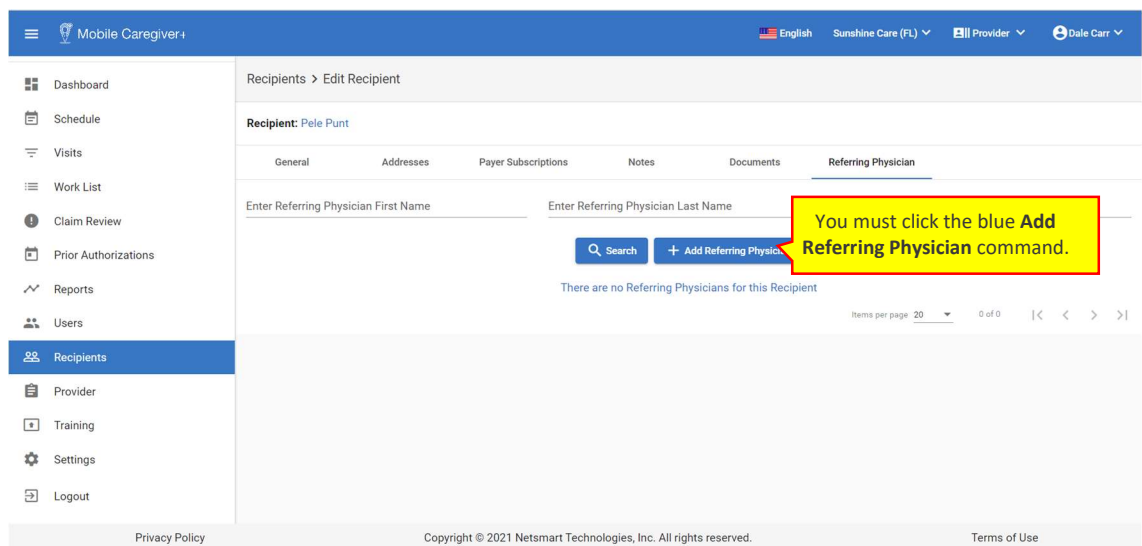


Note: The system will automatically display the General tab of the Edit Recipient screen.

- v. Click on the **Referring Physician** tab.



- vi. To link a Recipient to an existing Mobile Caregiver+ Referring Physician profile, you must click the blue **Add Referring Physician** command.



Note: The system will automatically display a table listing all Referring Physicians that have already been linked to the Recipient's Mobile Caregiver+ profile.

- vii. Enter the Referring Physician's partial or full first and/or last name to search for an existing Mobile Caregiver+ Referring Physician profile.
- viii. Click the blue **Search** Command.



Link Referring Physician ×

Enter Referring Physician First Name Enter Referring Physician Last Name Enter Referring Physician ID

[Search](#)

- ix. Review the search result to see if there is an existing Mobile Caregiver+ Referring Physician profile; ensure that the profile data is accurate.

Link Referring Physician ×

Enter Referring Physician First Name Enter Referring Physician Last Name Enter Referring Physician ID

[Change Search Criteria](#) [Add Different Referring Physician](#)

Referring Physician/s found based on the search parameters
Select Referring Physician to be linked with the Recipient

Referring Physician First Name	Referring Physician Last Name	Referring Physician ID	Referring Physician NPI Taxonomy	
Example	Physician	876543211	-	Link Physician
Example	Three Physician	555555555	-	Link Physician
Example	Two Physician	666666666	-	Link Physician

Warning

Be sure to confirm that the Referring Physician's information is accurate before linking a Recipient to an existing Mobile Caregiver+ Referring Physician profile.

- x. If there is an accurate existing Mobile Caregiver+ Referring Physician profile, click on the **Link Physician** command.



Link Referring Physician ✕

Enter Referring Physician First Name

Enter Referring Physician Last Name

Enter Referring Physician ID

Change Search Criteria
Add Different Referring Physician

i
Referring Physician/s found based on the search parameters
 Select Referring Physician to be linked with the Recipient

Referring Physician First Name	Referring Physician Last Name	Referring Physician ID	Referring Physician NPI Taxonomy	
Example	Physician	876543211	-	Linked
Example	Three Physician	555555555	-	Linked
Example	Two Physician	666666666	-	Link Physician
Example	Physician	888888888	-	Link Physician

Items per page 20
1 - 4 of 4
|< < > >|

Note: The system will link the Referring Physician to the Recipient and the link status will change from Link Physician to Linked.




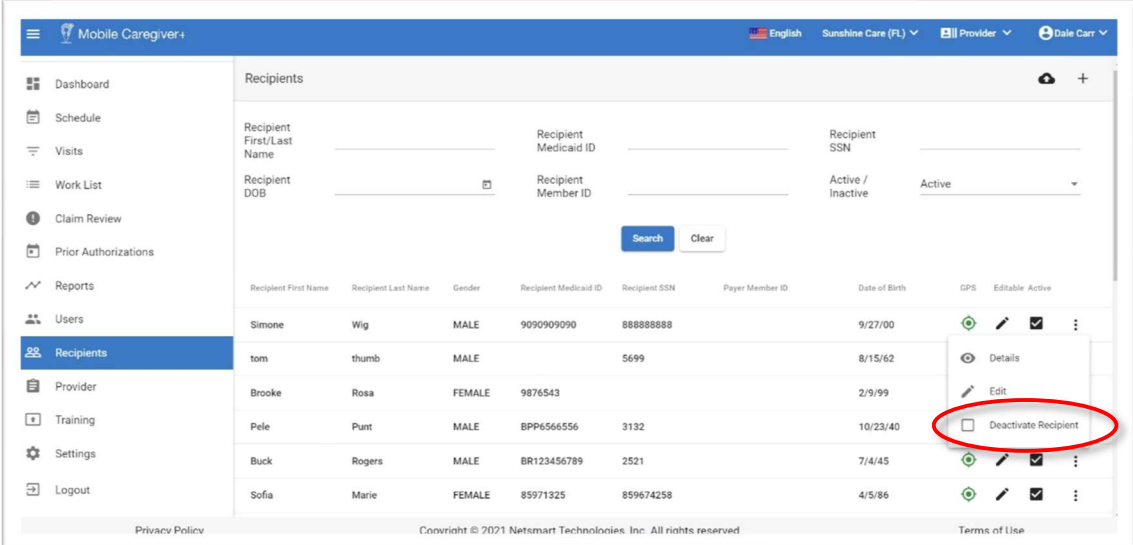
9.11. Deactivating a Recipient's MCG+ Profile

When Recipients are added to the Mobile Caregiver+ System they automatically have the status Active. Providers can deactivate Recipients who they no longer provide services for, who are no longer eligible for services.

Deactivating a Recipient does not remove the Recipient's MCG+ profile from Netsmart EVV System; it simply deactivates the Recipient's Mobile Caregiver+ MCG+ profile. Inactive Recipients will no longer appear in the Active Recipients List and cannot be scheduled in new Visits.

To deactivate a Recipient:

1. From the Main Menu, click **Recipients**.
2. Locate and click on the Actions icon, , for the Recipient whose Mobile Caregiver+ profile you want to deactivate.
3. From the shortcut submenu, click **Deactivate Recipient** checkbox.



The screenshot shows the 'Recipients' page in the Mobile Caregiver+ system. A table lists recipients with columns for First Name, Last Name, Gender, Medicaid ID, SSN, Payer Member ID, Date of Birth, GPS, and Editable Active. The recipient 'tom thumb' is selected, and a context menu is open over it. The 'Deactivate Recipient' option, represented by a checkbox, is circled in red.


Recipient First Name	Recipient Last Name	Gender	Recipient Medicaid ID	Recipient SSN	Payer Member ID	Date of Birth	GPS	Editable	Active
Simone	Wig	MALE	9090909090	888888888		9/27/00			<input checked="" type="checkbox"/>
tom	thumb	MALE		5699		8/15/62			<input type="checkbox"/>
Brooke	Rosa	FEMALE	9876543			2/9/99			<input checked="" type="checkbox"/>
Pele	Punt	MALE	BPP656556	3132		10/23/40			<input checked="" type="checkbox"/>
Buck	Rogers	MALE	BR123456789	2521		7/4/45			<input checked="" type="checkbox"/>
Sofia	Marie	FEMALE	85971325	859674258		4/5/86			<input checked="" type="checkbox"/>

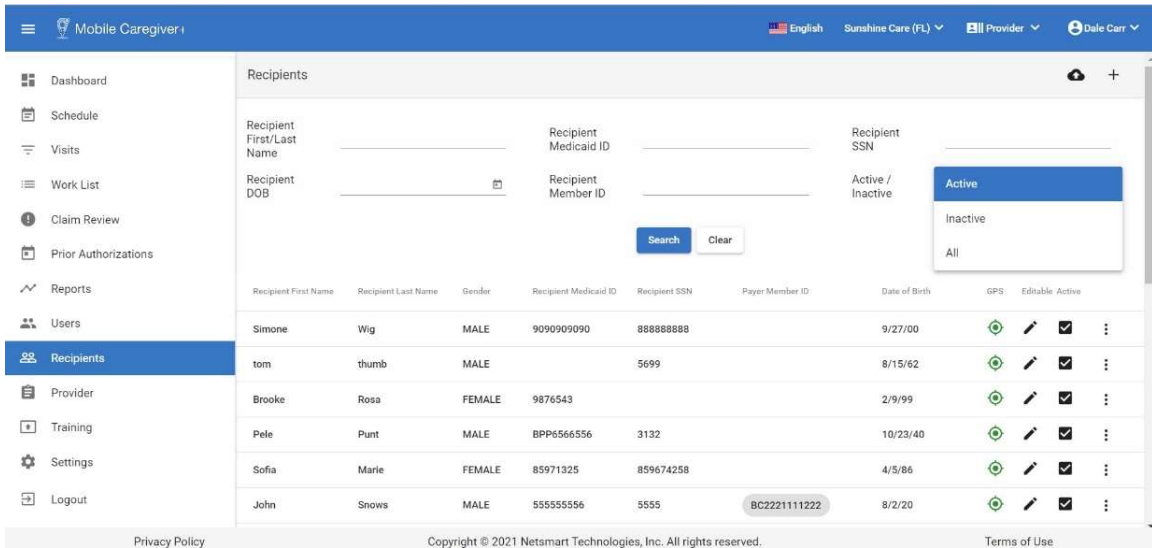
The system will display a green confirmation message in the lower-right corner of screen, indicating the Recipient is now inactive. Inactive Recipients will not appear in the Active Recipients List and cannot be scheduled for visits.

9.12. Activating an Inactive Recipient's MCG+ Profile













Inactive Recipients will not appear in the Active Recipients List.

To activate an inactive Recipient:

1. From the Main Menu, click **Recipients**.
2. From the header, click in the **Active/Inactive** field and select either **Inactive** or **All**.
3. Click the blue **Search** command to view a list of Inactive or All Recipients that have been enrolled with the active Provider Agency.
4. From the list, locate and click on the Actions icon, , for the Recipient whose Mobile Caregiver+ Profile you want to activate.
5. From the shortcut submenu, click **Activate**.



The screenshot displays the 'Recipients' management page in the Mobile Caregiver+ provider portal. The top navigation bar includes 'Mobile Caregiver+', 'English', 'Sunshine Care (FL)', 'Provider', and 'Dale Carr'. The left sidebar contains a menu with 'Recipients' selected. The main content area features a search form with fields for Recipient First/Last Name, Recipient Medicaid ID, Recipient SSN, Recipient Member ID, and Recipient DOB. A dropdown menu is open, showing 'Active', 'Inactive', and 'All' options. Below the search form is a table of recipients with columns for Recipient First Name, Recipient Last Name, Gender, Recipient Medicaid ID, Recipient SSN, Payer/Member ID, Date of Birth, GPS, Editable, and Active. The 'Active' column shows a green checkmark for each recipient. The 'Recipients' menu item is highlighted in the left sidebar.

Recipient First Name	Recipient Last Name	Gender	Recipient Medicaid ID	Recipient SSN	Payer/Member ID	Date of Birth	GPS	Editable	Active
Simone	Wig	MALE	9090909090	888888888		9/27/00			<input checked="" type="checkbox"/>
tom	thumb	MALE		5699		8/15/62			<input checked="" type="checkbox"/>
Brooke	Rosa	FEMALE	9876543			2/9/99			<input checked="" type="checkbox"/>
Pele	Punt	MALE	BPP6566556	3132		10/23/40			<input checked="" type="checkbox"/>
Sofia	Marie	FEMALE	85971325	859674258		4/5/86			<input checked="" type="checkbox"/>
John	Snows	MALE	555555556	5555	BC222111222	8/2/20			<input checked="" type="checkbox"/>

The system will display a green confirmation message in the lower-right corner of screen, indicating the Recipient is now active.



10. Managing Provider Agencies

- [Viewing Your Mobile Caregiver+ Provider Agency Details](#)
- [Updating Your Mobile Caregiver+ Provider Agency Details](#)
- [Managing Payers](#)
- [Searching for a Payer](#)
- [Assigning Preconfigured Tasks to a Payer Service Code](#)
- [Manually Adding a New Task for a Payer Service Code](#)
- [Deactivating Tasks for a Payer](#)
- [Adding Medicaid ID at the Payer / Plan / Program Level](#)
- [Editing Payer / Plan / Program Level Provider Medicaid ID](#)
- [Deleting Provider Medicaid ID at the Payer / Plan / Program Level](#)
- [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](#)
- [Deleting a Payer Override Rate](#)

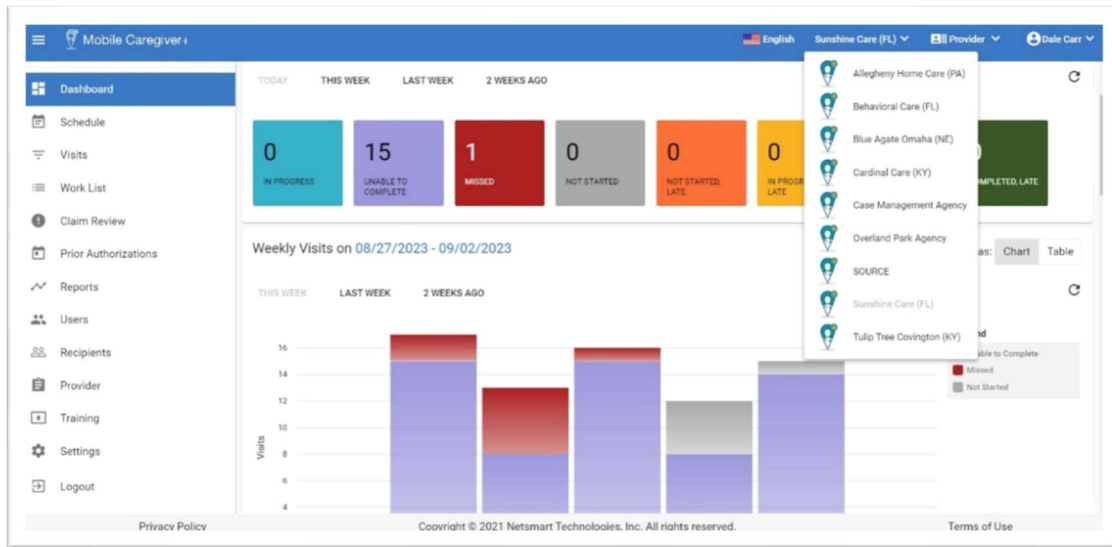
In most cases, Provider Agencies and Payers (including Service Codes and payment rates) are uploaded to the Mobile Caregiver+ Provider Portal and you will rarely have to perform the functions discussed in this section. Also, not all Provider agencies have access rights to edit their Provider settings; the Payer will determine whether Providers can edit their Provider settings, as well as the settings they can modify. Contact Netsmart Customer Support if you have questions before changing any Provider settings.



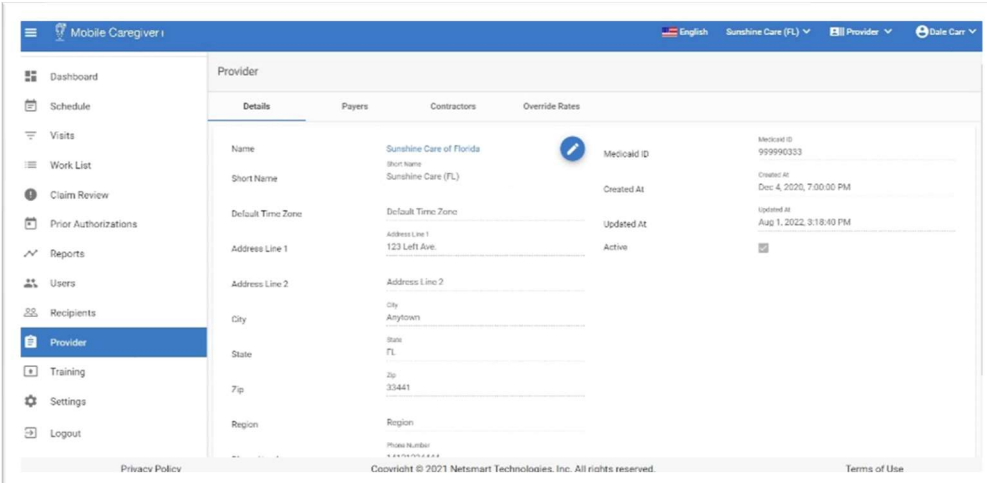
10.1. Viewing Your Mobile Caregiver+ Provider Agency Details

To view the Mobile Caregiver+ Details for a Provider Agency:

1. If your account is linked to multiple locations, click on the agency's name in the Task Bar to see a drop-down list of all agencies.




2. From the list, select the agency/location you want to view the Provider details for. The system will display the Provider Details tab. If your account is linked to multiple locations, click the agency name in the Navigation Bar to see a drop-down list of all agencies.
3. From the Main Menu, click **Provider**; the system will automatically display the Provider Details tab.



The screenshot shows the 'Provider' details page in Mobile Caregiver+. The page is titled 'Provider' and has tabs for 'Details', 'Payers', 'Contractors', and 'Override Rates'. The 'Details' tab is active, showing the following information for 'Sunshine Care of Florida':

Name	Sunshine Care of Florida	Medicaid ID	999990333
Short Name	Sunshine Care (FL)	Created At	Dec 4, 2020, 7:00:00 PM
Default Time Zone	Default Time Zone	Updated At	Aug 1, 2022, 3:18:40 PM
Address Line 1	123 Left Ave.	Active	<input type="checkbox"/>
Address Line 2	Address Line 2		
City	Anytown		
State	FL		
Zip	33441		
Region	Region		

The left sidebar contains navigation options like Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, Provider, Training, Settings, and Logout.

Name	Sunshine Care of Florida		Medicaid ID	999990333
Short Name	Short Name Sunshine Care (FL)		Created At	Dec 4, 2020, 7:00:00 PM
Default Time Zone	Default Time Zone		Updated At	Aug 1, 2022, 3:18:40 PM
Address Line 1	Address Line 1 123 Left Ave.		Active	<input checked="" type="checkbox"/>
Address Line 2	Address Line 2			
City	City Anytown			
State	State FL			
Zip	Zip 33441			
Region	Region			
Phone Number	Phone Number 14121234444			
Email	Email sunshine@crFL.com			
EIN	EIN 999990332			

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

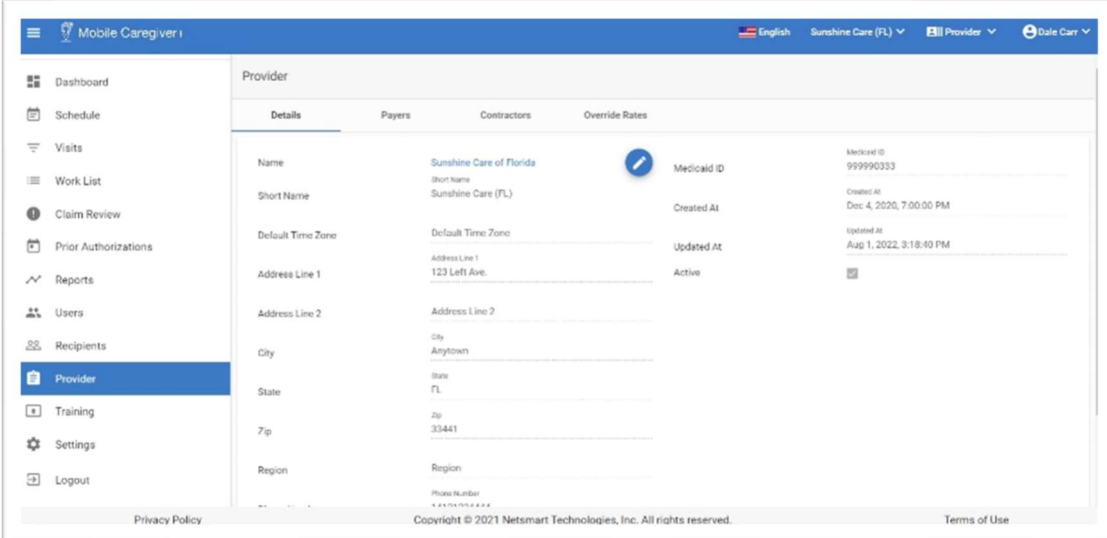
The system will display the Details for the selected agency.



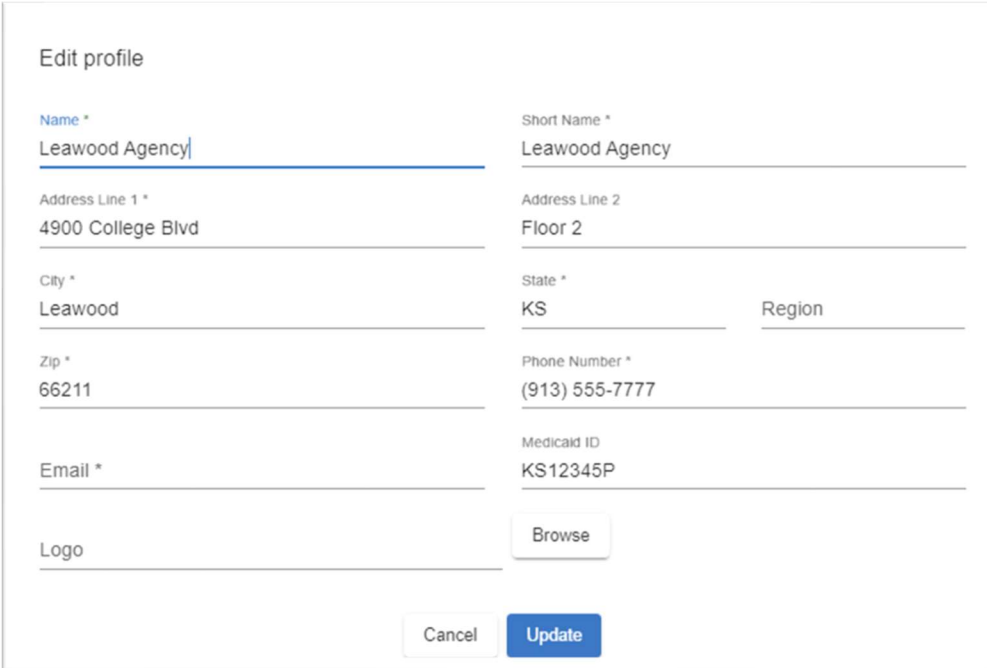
10.2. Updating Your Mobile Caregiver+ Provider Agency Details

To update a Provider Agency's details:

1. From the Main Menu, click **Provider**; the system will automatically display the Provider Details tab.



2. Click the edit icon, , located in the top-center portion of the screen.



User can edit permissible values in their Provider profiles.

3. Click **Update** to save any changes. The system will return to the initial Provider Details screen.

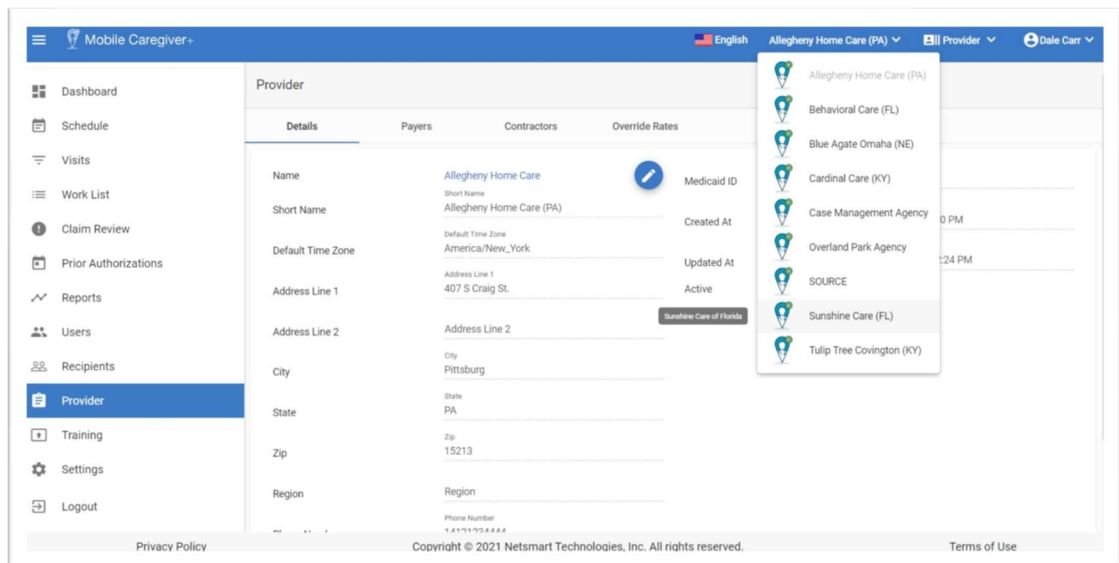
10.3. Managing Payers

Note: Not all agencies are authorized to add, link, or delete Payers. Please contact Netsmart Client Support before changing any Payer settings for your agency.

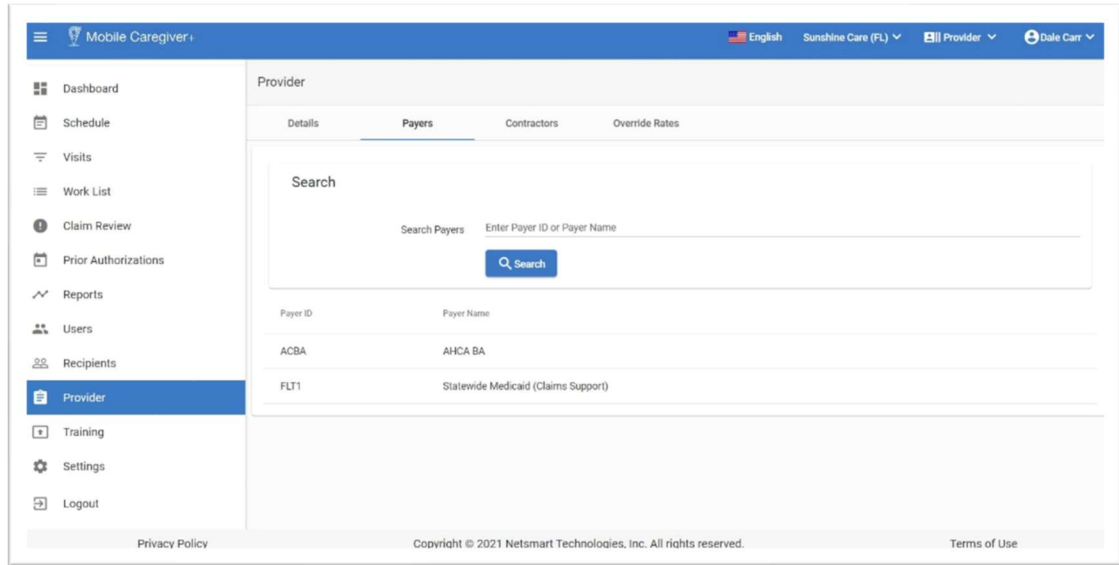
10.3.1. Searching for a Payer

To search for a Payer:

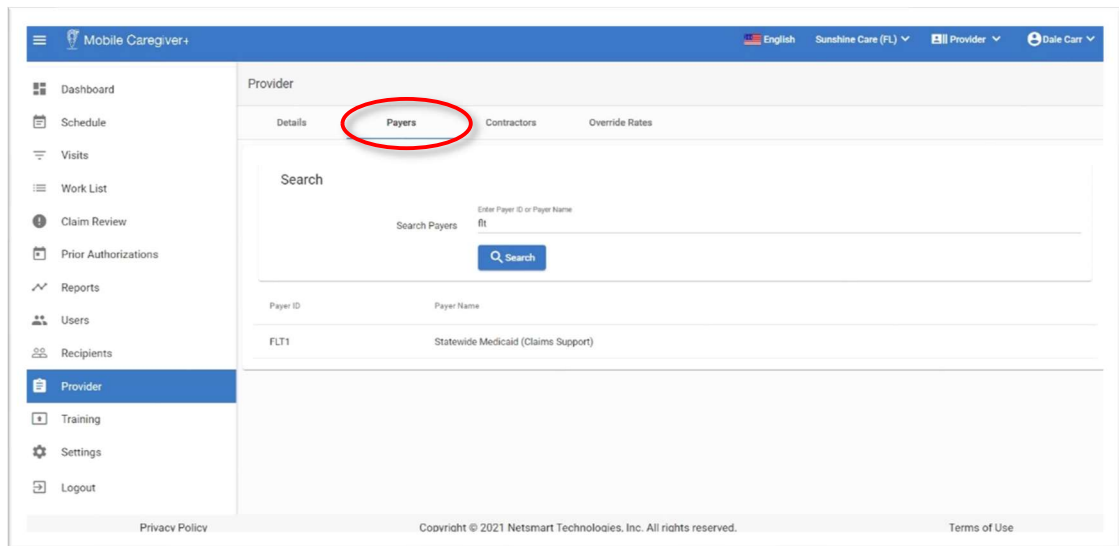
- i. If your account is linked to multiple locations, click on active agency name to see a drop-down list of all agencies.
- ii. From the list, select the agency/location whose Payer(s) you want to view.



- iii. From the Main Menu, click **Provider**.



- iv. Click the **Payers** tab to see the Payer(s) associated with the agency.
- v. Enter all or part of the Payer’s name in the Search Payer field.



- vi. Click the blue **Search** command. The system will display a list of Payer(s) that match the search parameter.

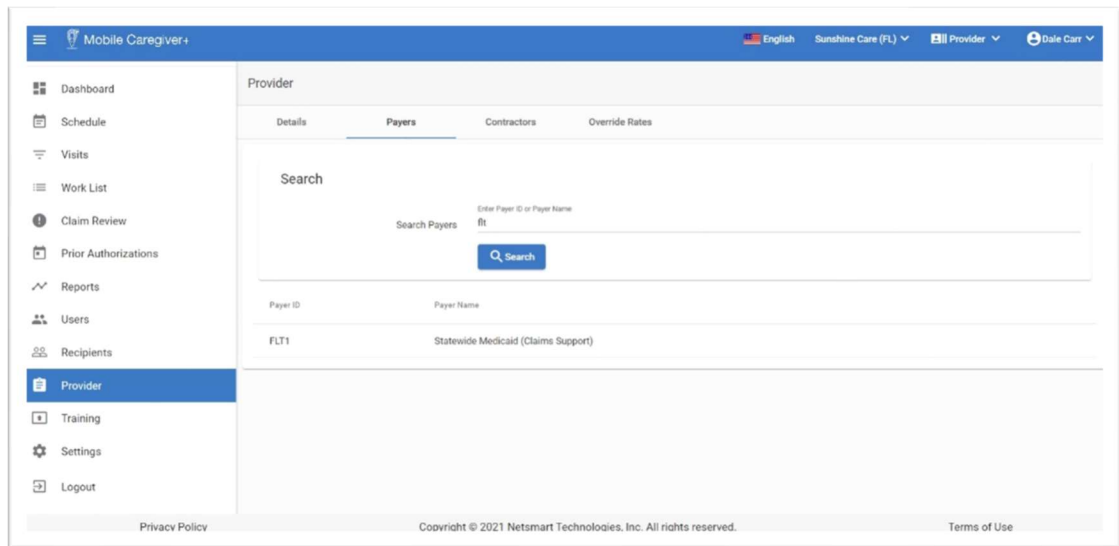
10.3.2. Assigning Preconfigured Tasks to a Payer Service Code

Depending on the Payer and Program Recipients are enrolled in, some Payers will automatically upload Tasks (also known as Plan of Care Activities or Daily Living activities) to the Provider Portal; some Payers allow Providers to add and manage Tasks. All Tasks should be configured as part of the setup process before Providers begin adding/scheduling visits in their Mobile Caregiver+ Provider Portals.

Note: Providers can have the option of selecting tasks from a preconfigured list or adding custom tasks for services.

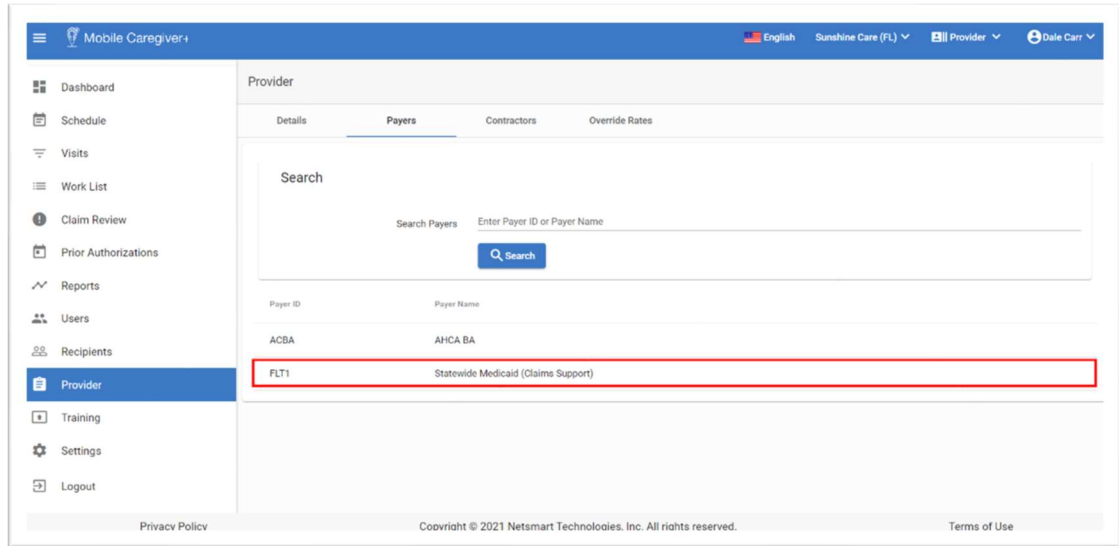
To assign preconfigured Tasks to a Service Code:

- i. From the Main Menu, click the **Provider**.
- ii. Click the **Payers** tab.

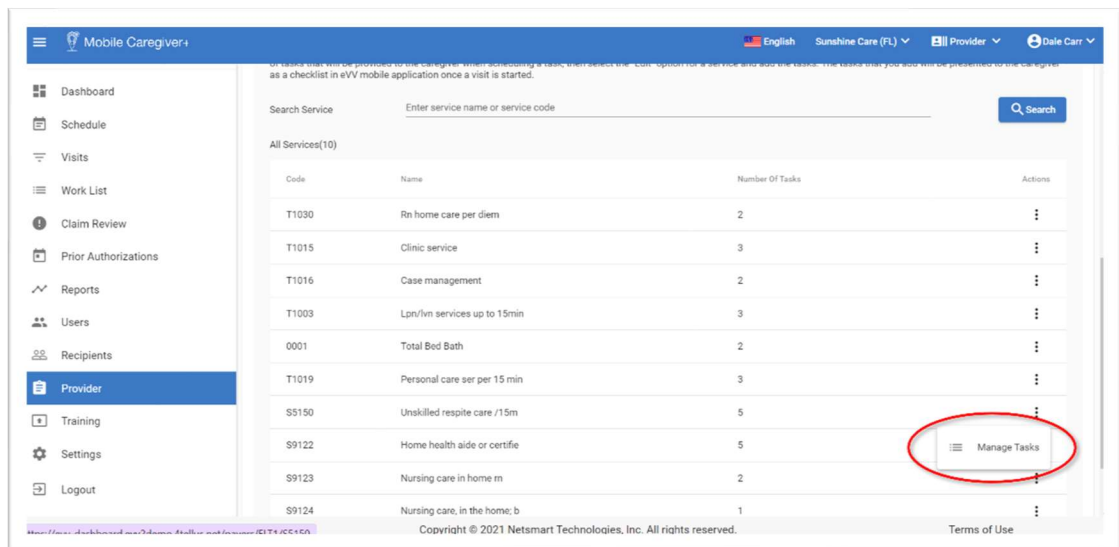


- iii. Locate and click on the record for the Payer whose Service Code you want to configure.

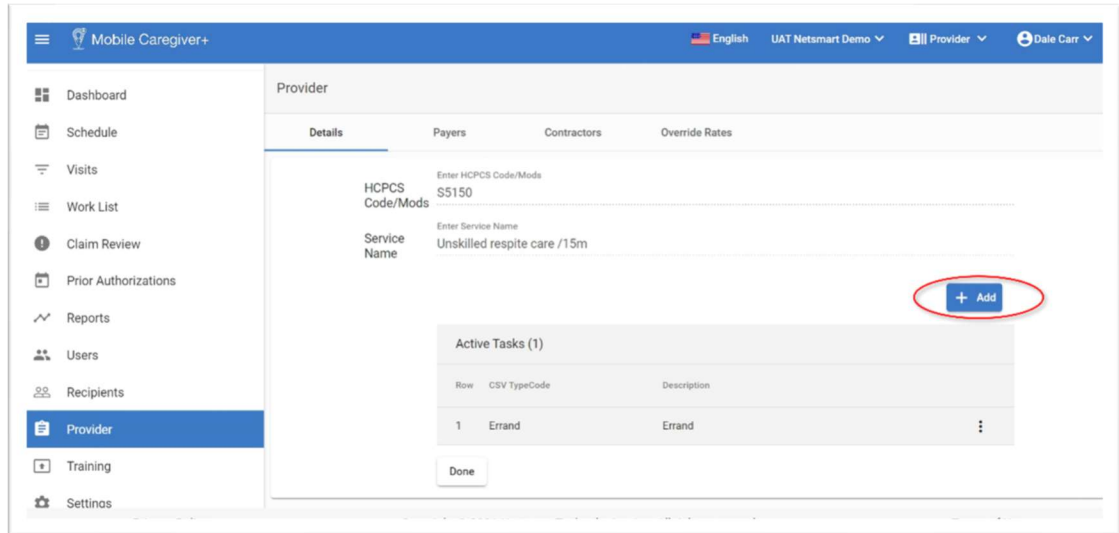




- iv. Scroll down in the **Payer's Details** to view the list of Service Codes that are configured for the Payer.
- v. Click the Actions icon, ⋮, of the Service Code to which you want to assign one or more preconfigured Task(s).
- vi. From the shortcut, click **Manage Tasks**.



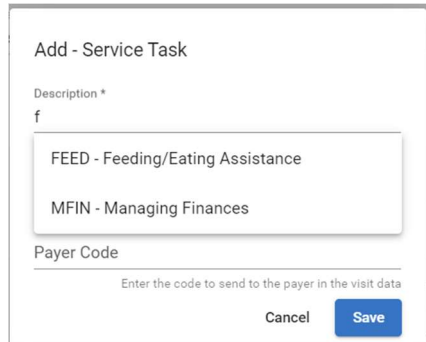
- vii. Click the Add New Task icon, .



Note: The system will display a list of all active tasks that have been added to the Service Code.

viii. Start typing the description of the Task in the **Description** field.

Note: The you must type in the same description used by the Payer.



*Note: The system will display the **Add – Service Task** dialog box.*

- ix. The system will display a list of preconfigured Tasks with matching descriptions.
- x. From the list, select the Task that you want to add to the Service Code.
- xi. Click the blue **Save** command to assign the Task to the Service Code.
- xii. Repeat steps vii through x to add additional preconfigured Tasks.
- xiii. Click **Done** after assigning all preconfigured Tasks.

HCPCS Code/Mods Enter HCPCS Code/Mods
 S5150

Service Name Enter Service Name
 Unskilled respite care /15m

+ Add

Active Tasks (5)		
Row	CSV TypeCode	Description
1	CTLL	Custom Task for Lunch & Learn
2	DINN	Prepare Dinner
3	FEED	Feeding/Eating Assistance
4	PCAR	Personal Care - General
5	TSOC	Transport/Attendance (Social)

Done

Note: The new Task will now be displayed with the Service Code on the Add New Visit form. The system does not automatically assign Tasks to previously scheduled visits. For Previously scheduled visits, Provider Admins must edit an upcoming visit and select any additional Tasks that are configured after visits are scheduled.

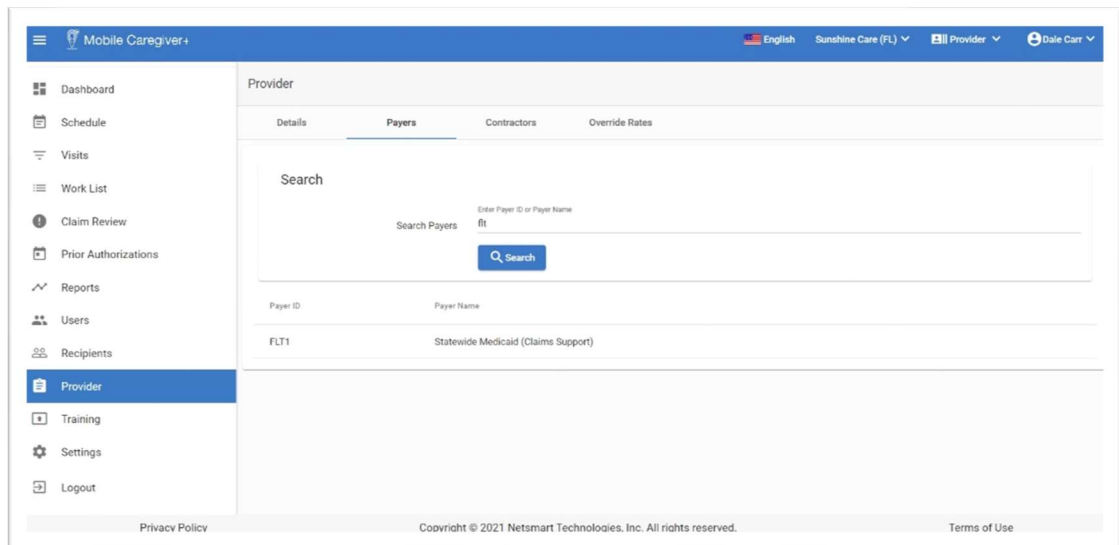


10.3.3. Manually Adding a New Task for a Payer Service Code

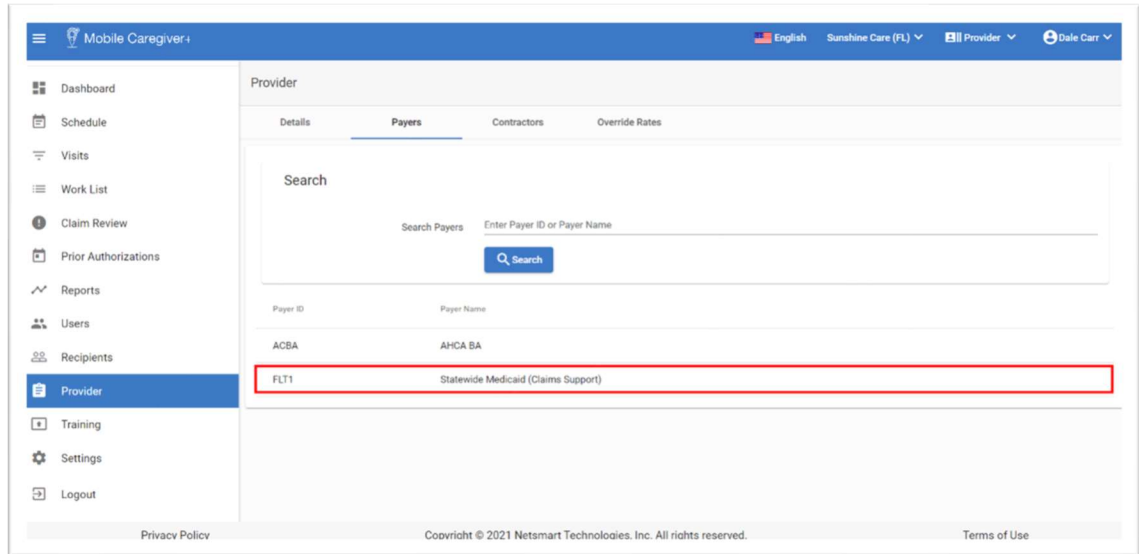
Depending on the Payer and Program a Recipient is enrolled in, some Payers will automatically upload Tasks (also known as Plan of Care Activities or Daily Living activities) to the Provider Portal; some Payers allow Providers to add and manage Tasks. All Tasks should be configured as part of the setup process before Providers begin adding/scheduling visits in their Mobile Caregiver+ Provider Portals.


To manually create and add custom Tasks to a Service Code:

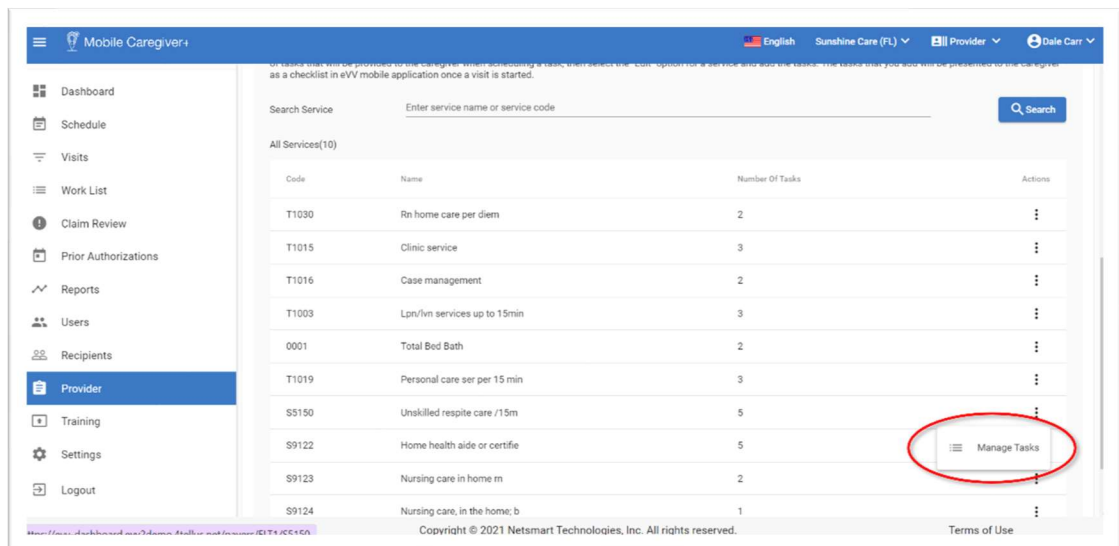
- i. From the Main Menu, click **Provider**.
- ii. Click the **Payers** tab.



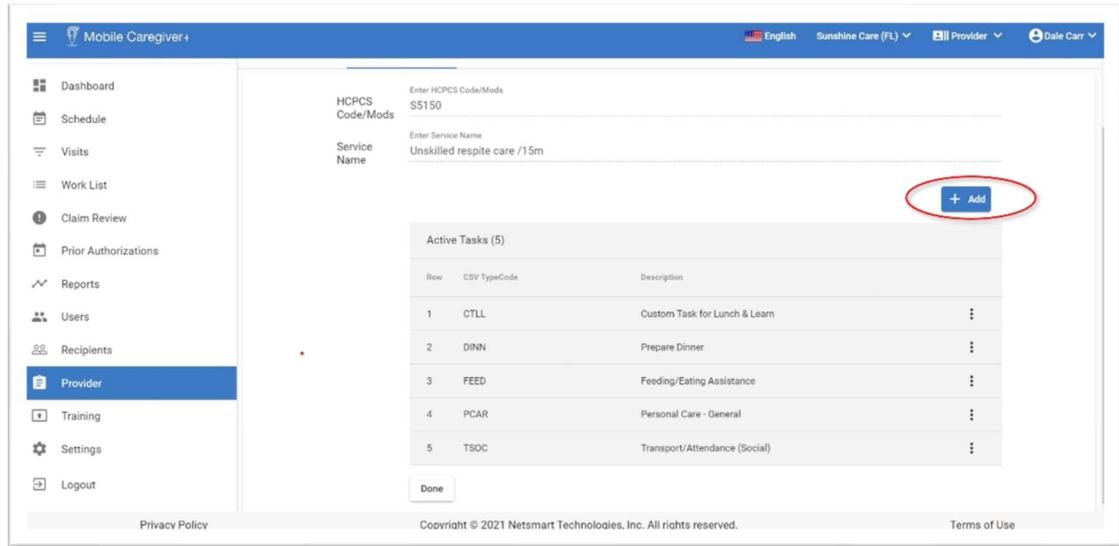
- iii. Locate and click on the Payer's record to view the details.



- iv. Scroll down in the **Payer's Details** to view the list of Service Codes that are configured for the Payer.
- v. Click the Actions icon, , of the Service Code you want to add a new Task to.
- vi. From the shortcut, click **Manage Tasks**.



- vii. Click the Add New Task icon,  Add.



Note: The system will display a list of all active tasks that have been added to the Service Code.

- viii. Enter a description for the new Task in the **Description** field.
- ix. Enter an alphanumeric CSV Code for the Task in the **CSV TypeCode** field.
Note: The CSV Code can only contain alphanumeric characters.
- x. Optional field: Enter the Payer code in the **Payer Code** field.

Add - Service Task

Description *
New Test Task

CSV TypeCode *
NT123

Payer Code

Cancel **Save**

*Note: The system will display the **Add – Service Task** dialog box.*

- xi. Click the blue **Save** command to add the custom Task to the list of Tasks.
Note: The new task will be added to the bottom of the list and automatically set as active.
- xii. Repeat steps vii through xi to add additional Tasks.



HCPCS Code/Mods Enter HCPCS Code/Mods
 S5150

Service Name Enter Service Name
 Unskilled respite care /15m

[+ Add](#)

Active Tasks (5)		
Row	CSV TypeCode	Description
1	CTLL	Custom Task for Lunch & Learn
2	DINN	Prepare Dinner
3	FEED	Feeding/Eating Assistance
4	PCAR	Personal Care - General
5	TSOC	Transport/Attendance (Social)

[Done](#)

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Note: The new Task will now be displayed with the Service Code on the Add New Visit form. The system does not automatically assign Tasks to previously scheduled visits. For Previously scheduled visits, Provider Admins must edit an upcoming visit and select any additional Tasks that are configured after visits are scheduled.

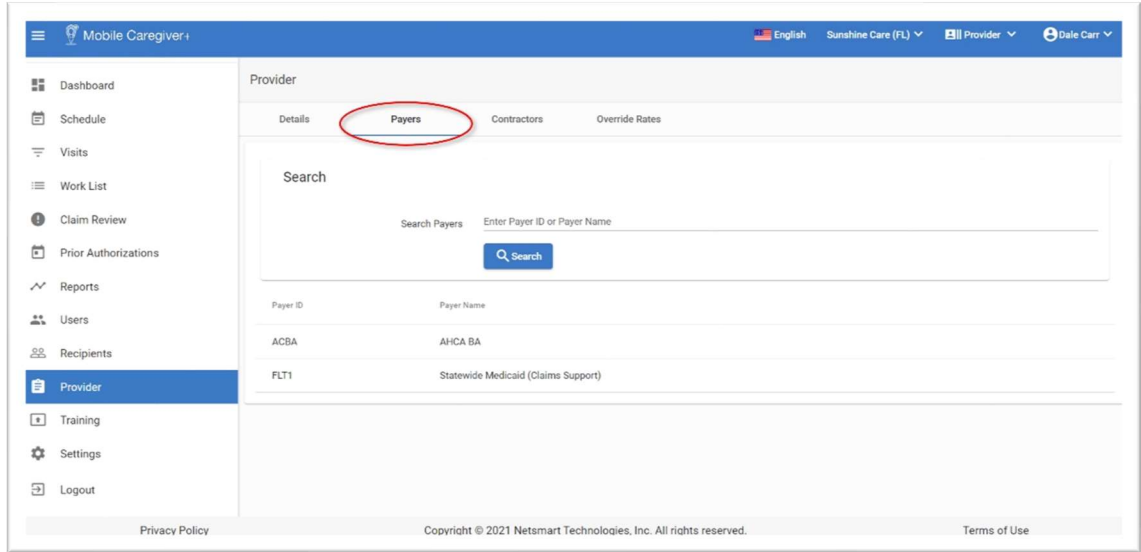
xiii. Click **Done** to exit the Manage Tasks form.



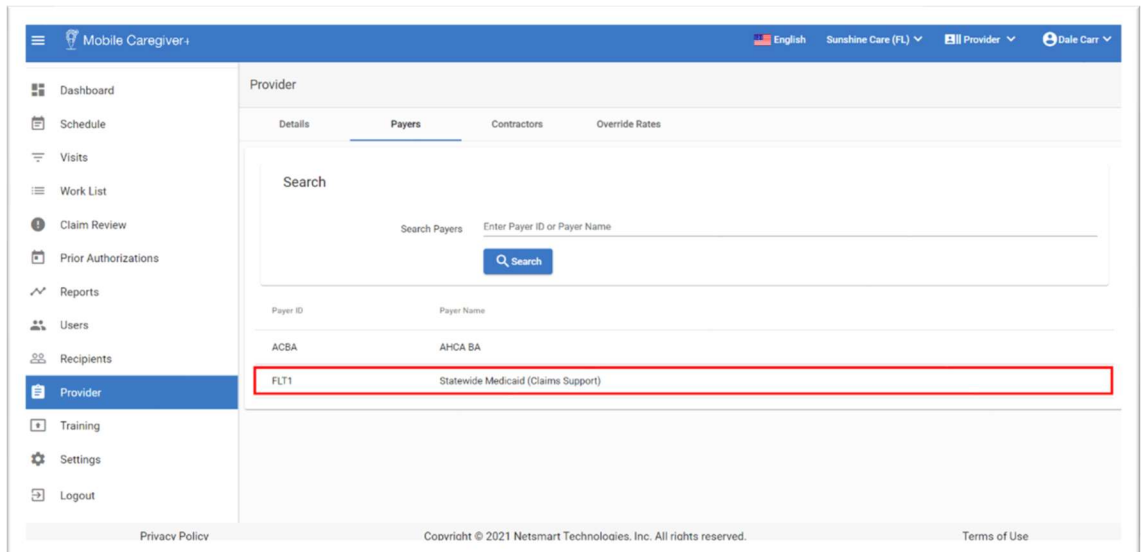
10.3.4. Deactivating Tasks for a Payer Service Code

To deactivate a task:

- i. From the Main Menu, click **Provider**.
- ii. Click the **Payers** tab.



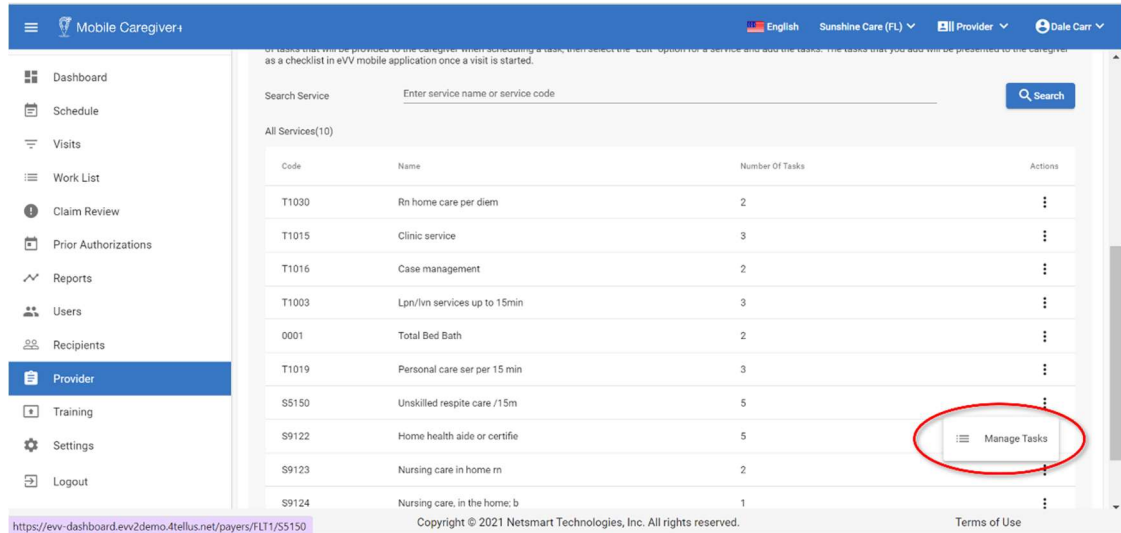
- iii. Locate and click on the Payer's record to view the details.



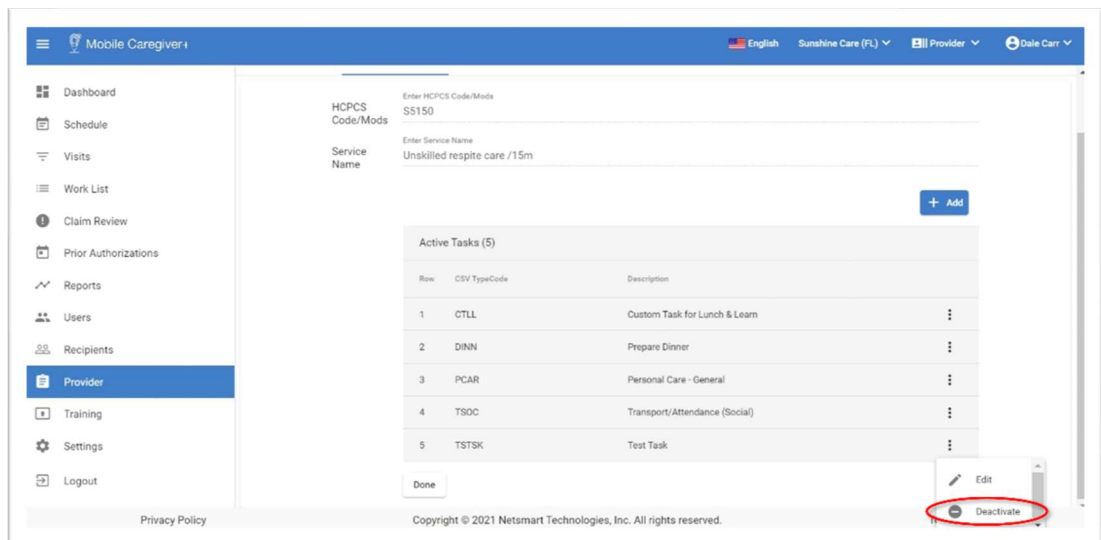
- iv. Scroll down in the **Payer's Details** to view the list of Service Codes that are configured for the Payer.



- v. Click the Actions icon, ⋮, for the Service Code you want to deactivate Tasks from.
- vi. From the shortcut, select **Manage Tasks**.



- vii. From the Active Tasks list, locate and click on the Actions icon, ⋮, for the Task you want to Deactivate.
- viii. From the shortcut submenu, click **Deactivate**.



Note: The system will display a green confirmation message in the lower-right corner of the screen, indicating that the Task was successfully deactivated and removed from the Active Tasks list.

- ix. Click **Done** to exit the Manage Tasks form.

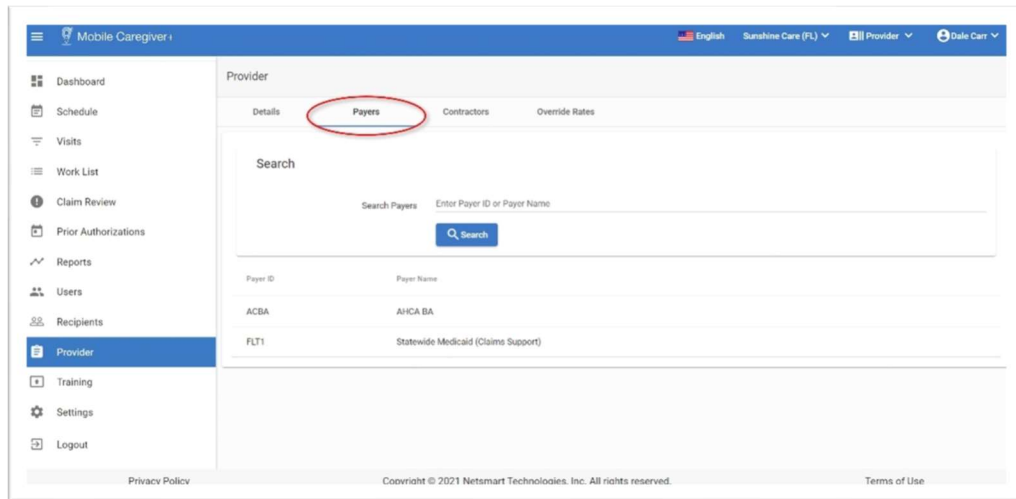


10.3.5. Adding Medicaid ID at the Payer Plan/Program Level

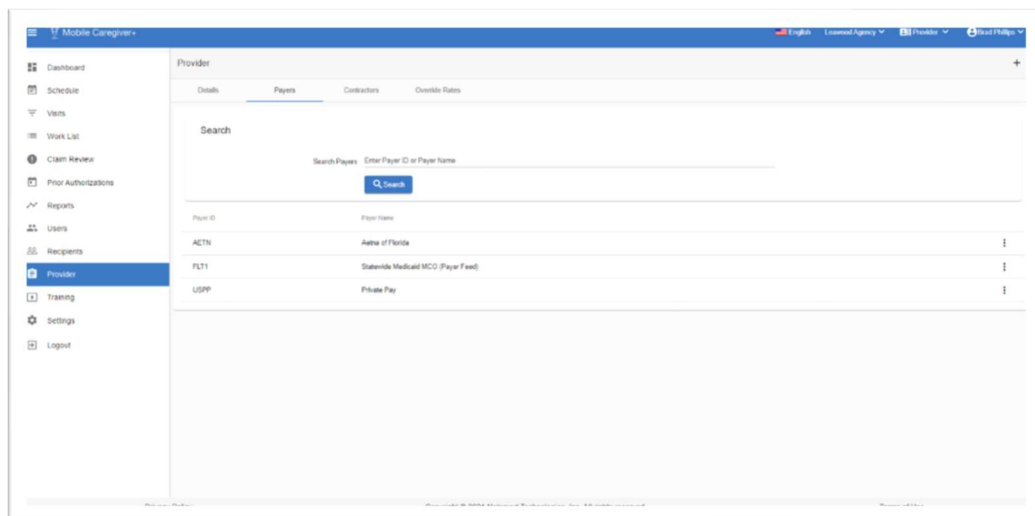
Depending on the Payer, the system allows Providers to enter a Provider Medicaid ID that is associated with a Payer, Plan, and Program. This is an override to the Medicaid ID associated with the Provider.

To add a Provider Medicaid ID that is associated with a Payer/Plan/Program:

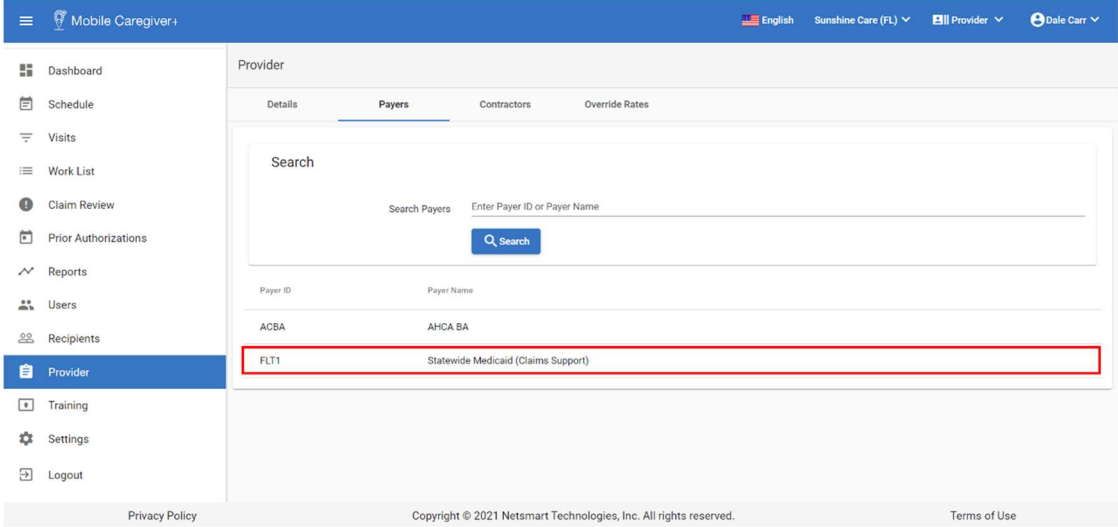
- i. From the Main Menu, click **Provider**.
- ii. Click the **Payers** tab to see the Payer(s) associated with the agency.
- iii. Enter all or part of the Payer's name in the **Search Payer** field.



- iv. Click the blue **Search** command. The system will display a list of Payer(s) that match the search parameter.

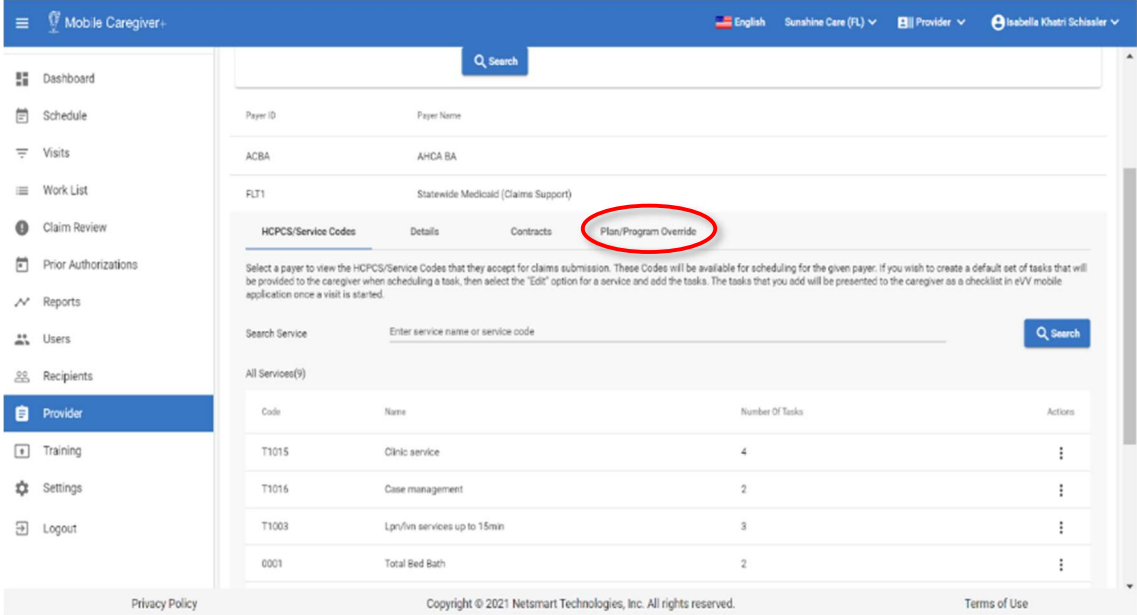


- v. Select the Payer for which you will enter a Provider Medicaid ID. The system will expand the Payer's information.



The screenshot shows the Mobile Caregiver+ interface. On the left is a navigation menu with 'Provider' selected. The main content area is titled 'Provider' and has tabs for 'Details', 'Payers', 'Contractors', and 'Override Rates'. The 'Payers' tab is active, showing a search bar and a table of payers. The 'FLT1' payer, labeled 'Statewide Medicaid (Claims Support)', is highlighted with a red rectangular box.

- vi. Click the Plan/Program Override tab.

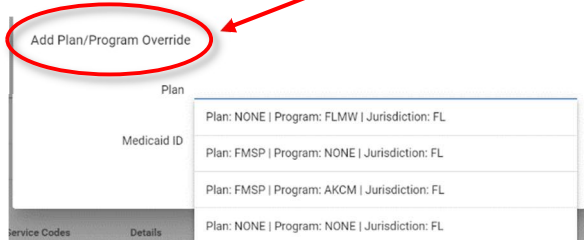
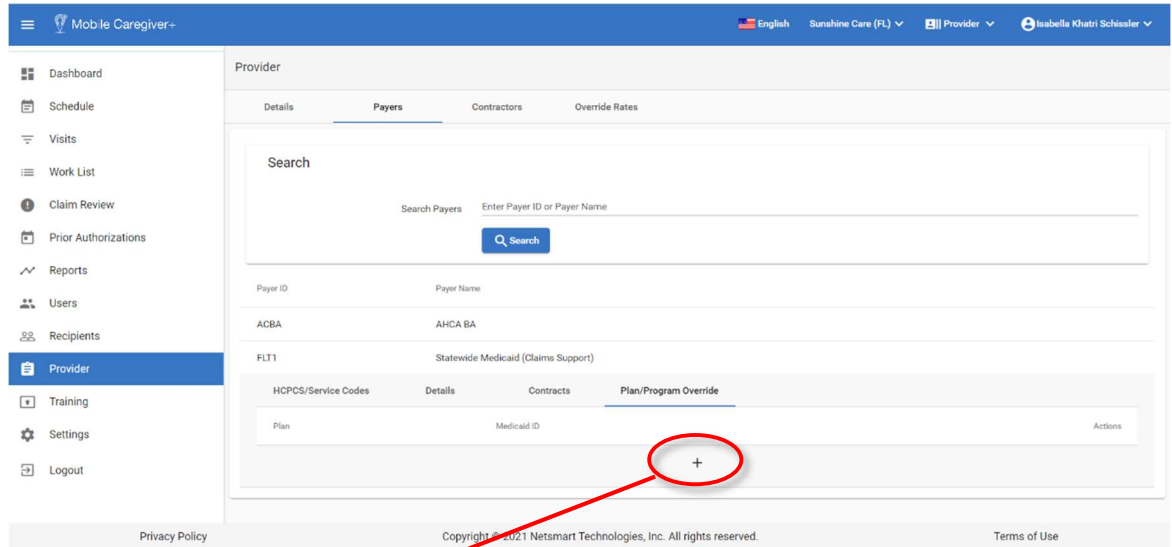


This screenshot shows the 'Plan/Program Override' tab selected for the 'FLT1' payer. The 'Plan/Program Override' tab is circled in red. Below the tabs, there is a search bar for services and a table of services. The table lists various service codes and their corresponding names and task counts.

Code	Name	Number Of Tasks	Actions
T1015	Clinic service	4	⋮
T1016	Case management	2	⋮
T1003	Lpn/rn services up to 15min	3	⋮
0001	Total Bed Bath	2	⋮

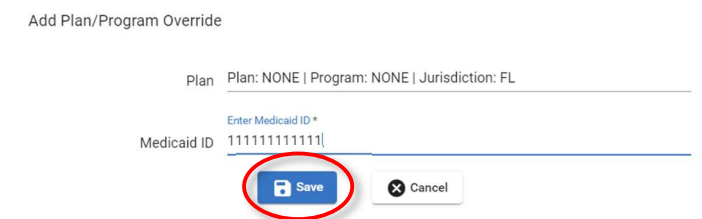
- vii. Click the add (+) button to open the Add Plan/Program Override dialog box.





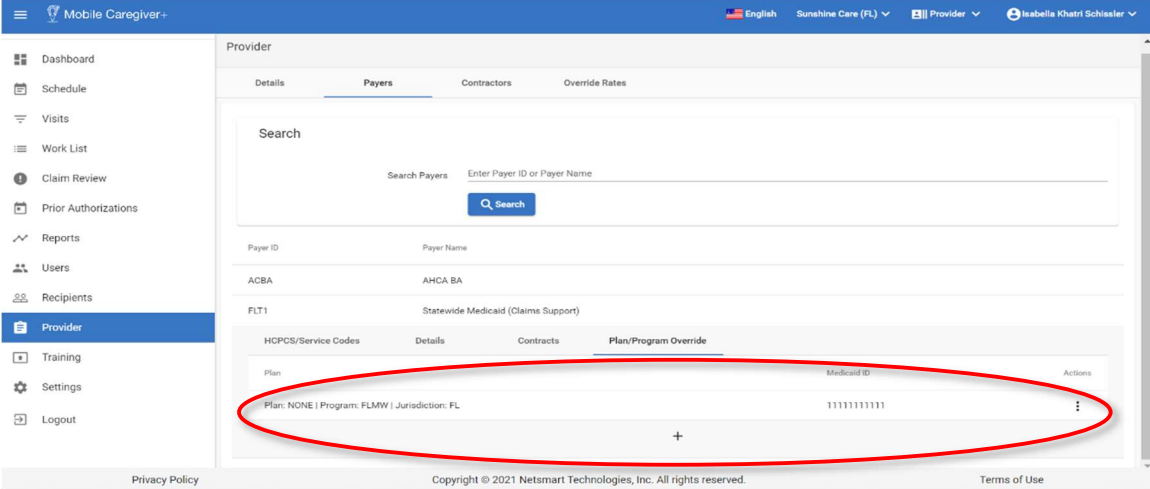
- viii. From the Add Plan/Program Override dialog box, click in the **Plan** field to select the Plan/Program or program with which the Provider’s Medicaid ID is associated.
- ix. Type the Provider’s Medicaid ID that is associated with the Plan/Program, in the respective field.

*Note: The Provider **Medicaid ID** field is required. If this field is left blank, the User will not be able to save changes.*



- x. Click **Save** to save the edits. Click **Cancel**, to discard any entries made and close out of the Add Plan/Program Override dialog box.





The screenshot shows the 'Provider' portal with the 'Payers' tab selected. A search bar is present at the top of the payer list. Below it, a table lists payer details including Payer ID, Payer Name, ACBA, AHCA BA, and FLT1. The 'Plan/Program Override' section is highlighted with a red oval, showing a table with columns for Plan, Medicaid ID, and Actions. The data row shows 'Plan: NONE | Program: FLMW | Jurisdiction: FL' and a 'Medicaid ID' of '111111111111'.

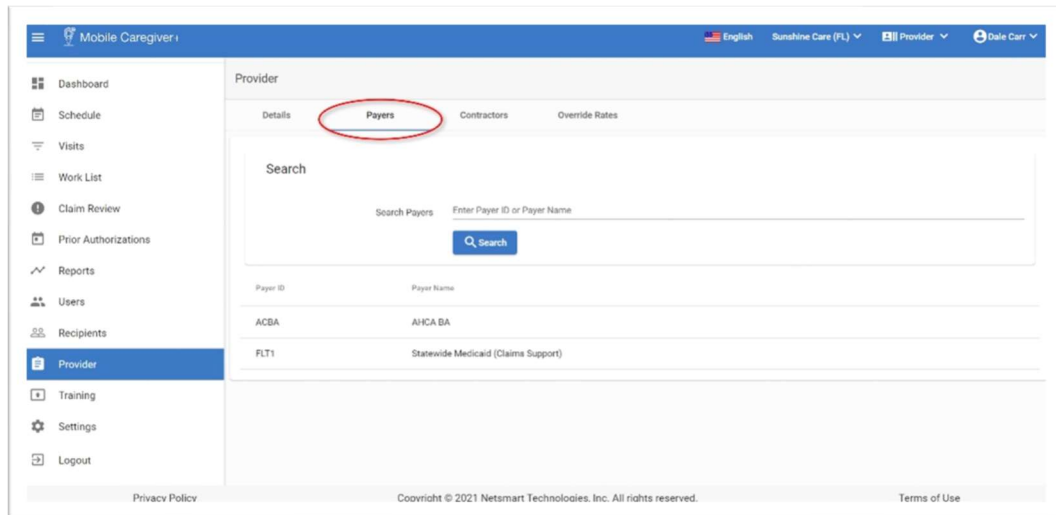
The Plan/Program section will be added to the screen, and the section will display the Plan(s)/Program(s) with a Medicaid ID override set up for the selected Payer.



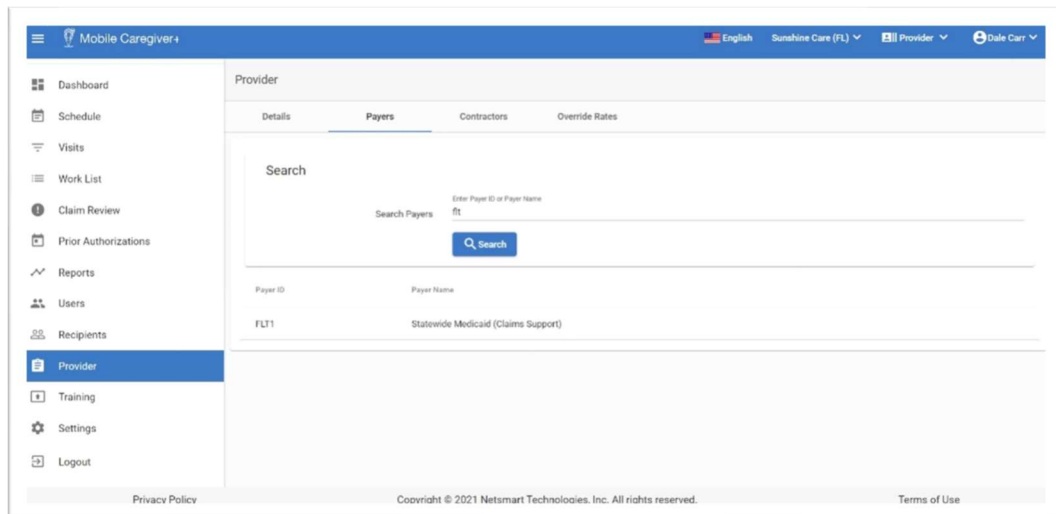
10.3.6. Editing Payer Plan/Program Level Provider Medicaid ID

To edit a Provider Medicaid ID at the Payer / Plan / Program level:

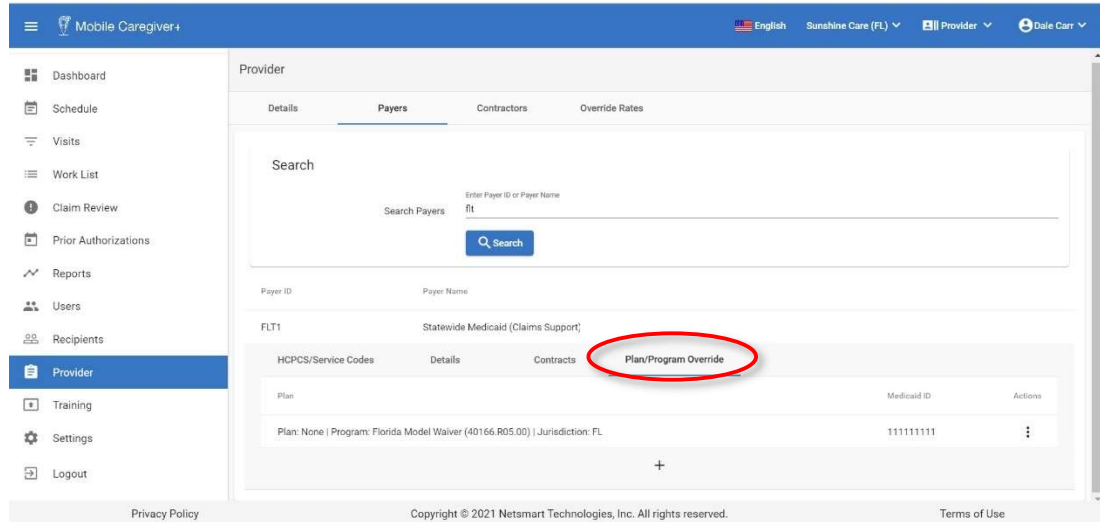
- i. From the Main Menu, click **Provider**.
- ii. Click the **Payers** tab to see the Payer(s) associated with the agency.
- iii. Enter all or part of the Payer's name in the Search Payer field.



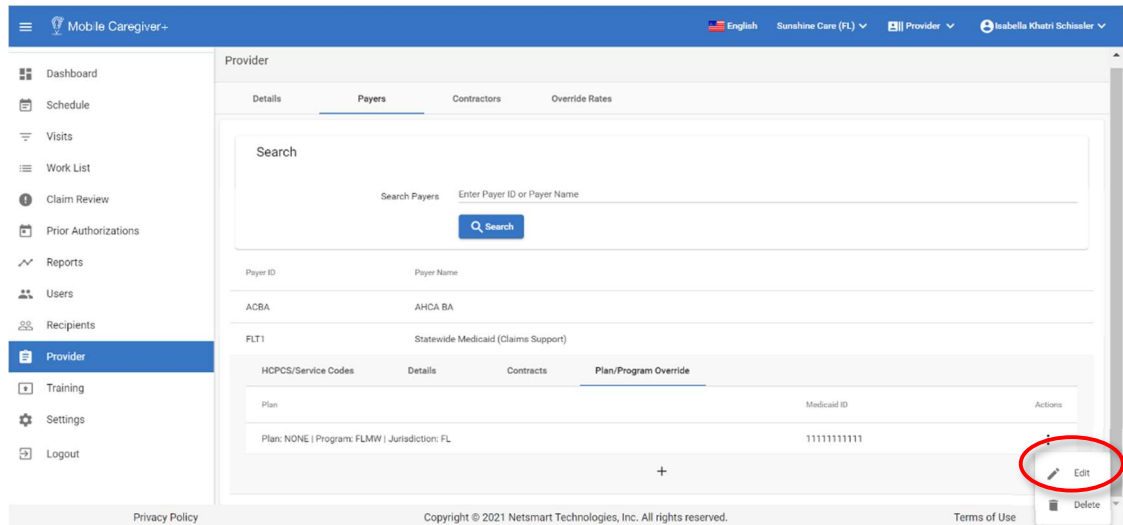
- iv. Click the blue **Search** command. The system will display a list of Payer(s) that match the search parameter.
- v. Select the Payer in which you will enter a Provider Medicaid ID. The system will expand the Payer's information.



- vi. Click the **Plan/Program Override** tab. The system will display the Plan / Program name with the associated Medicaid ID.



- vii. Find the Plan that needs to be edited.
- viii. Click the actions icon, located to the right of the Plan line.
- ix. From the submenu, click **Edit**.



- x. Edit the Plan and/or the Medicaid ID.



Edit Plan/Program Override

Plan Plan: NONE | Program: NONE | Jurisdiction: FL

Enter Medicaid ID *

Medicaid ID 22

The Edit Plan/Program Override dialog box will appear.

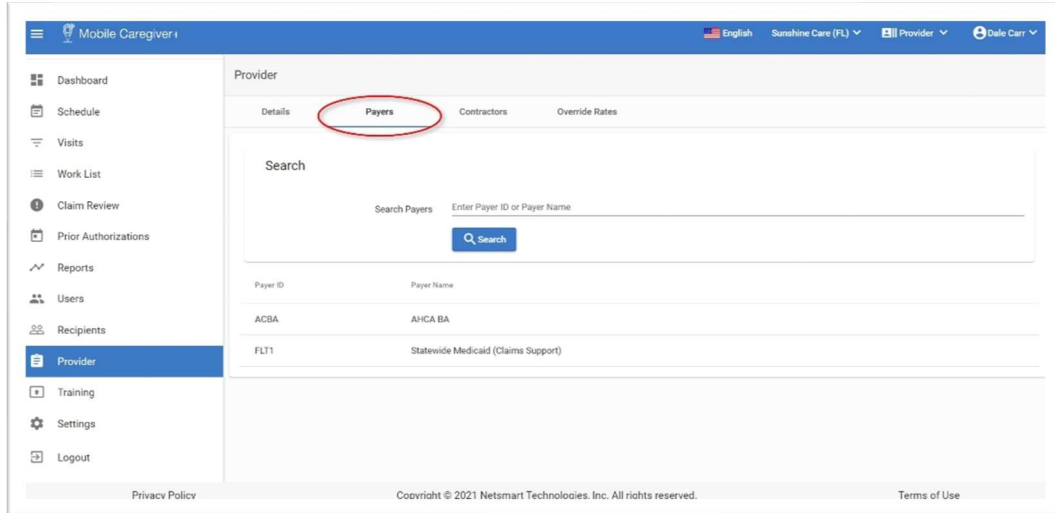
- xii. Click **Cancel** to discard any entries and close the Edit Plan/Program Override dialog box.
- xii. Click **Save** to save the changes.

Note: The updated record will be displayed in the Plan/Program list.

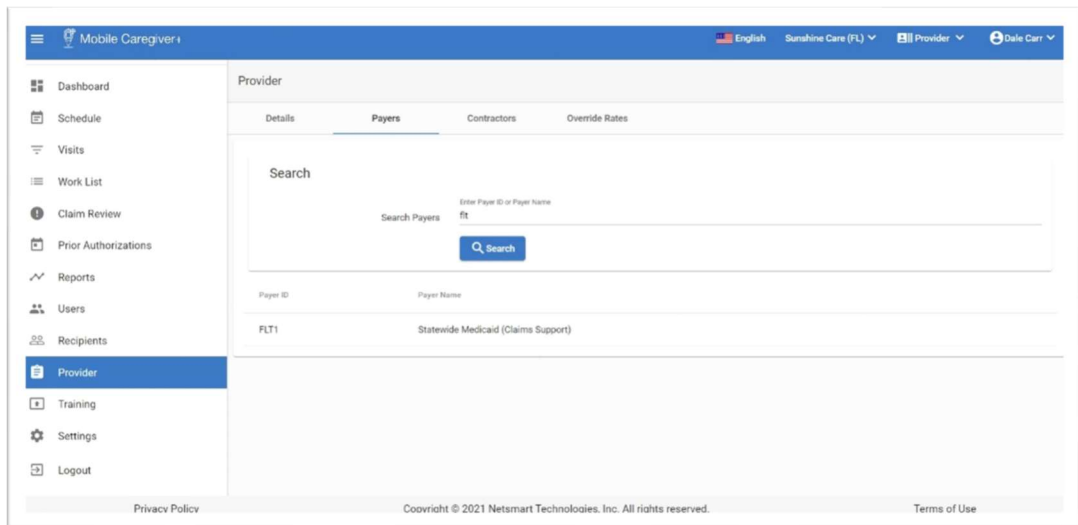
10.3.7. Deleting Provider Medicaid ID at the Payer Plan/Program Level

To delete a Provider Medicaid ID at the Payer Plan/Program level:

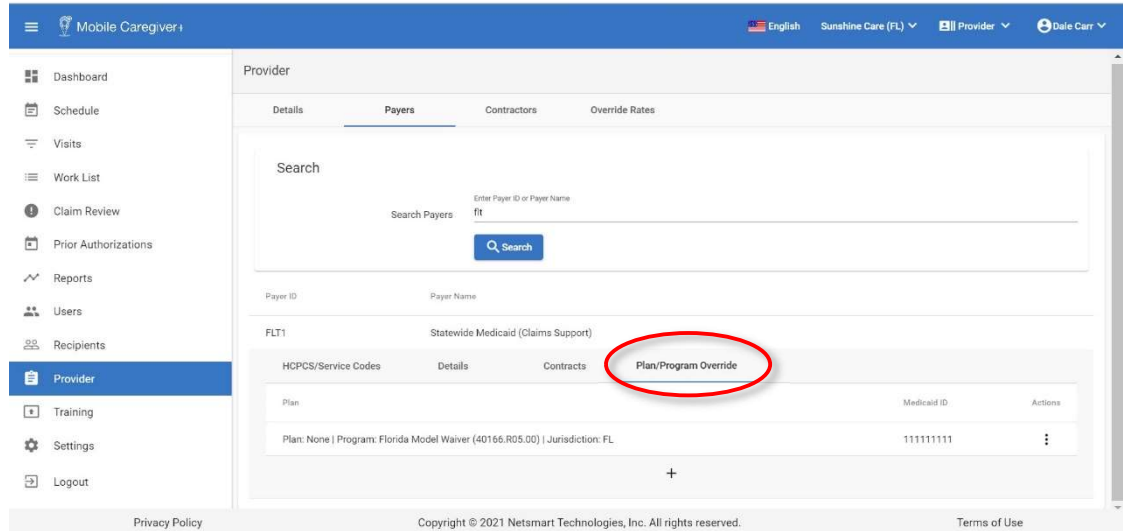
- i. From the Main Menu, click **Provider**.
- ii. Click the **Payers** tab to see the Payer(s) associated with the agency.



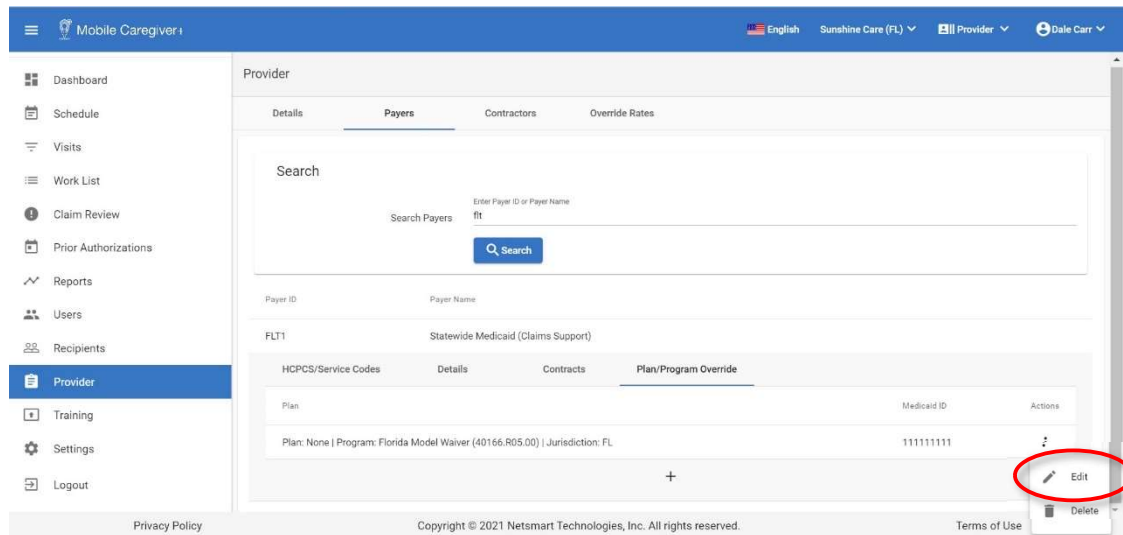
- iii. Enter all or part of the Payer's name in the Search Payer field.
- iv. Click the blue **Search** command. The system will display a list of Payer(s) that match the search parameter.
- v. Select the Payer in which you will enter a Provider Medicaid ID. The system will expand the Payer's information.



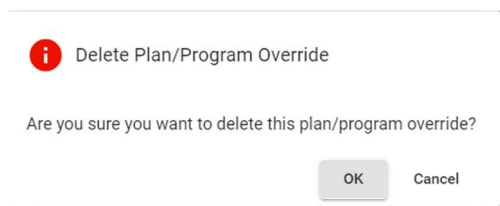
- vi. Click the **Plan/Program Override** tab. The system will display the Plan / Program name with the Medicaid ID associated.



- vii. Find the Plan that needs to be edited.



- viii. Click the actions icon, located to the right of the Plan line.
- ix. From the submenu, click **Delete**.



Note: A confirmation dialog will appear to verify deleting the override.



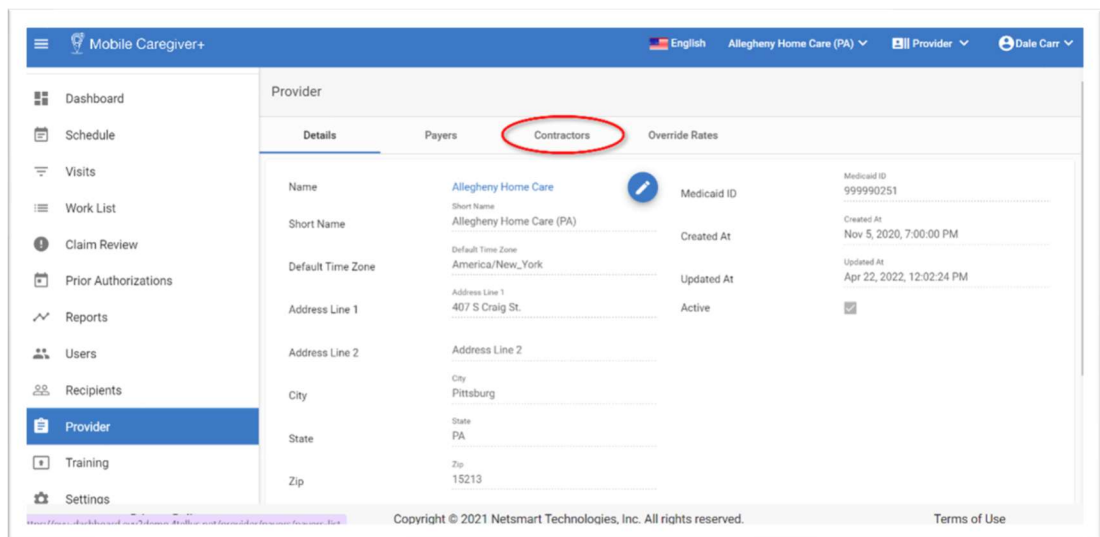
x. Click **OK**.

10.4. Managing Contractors

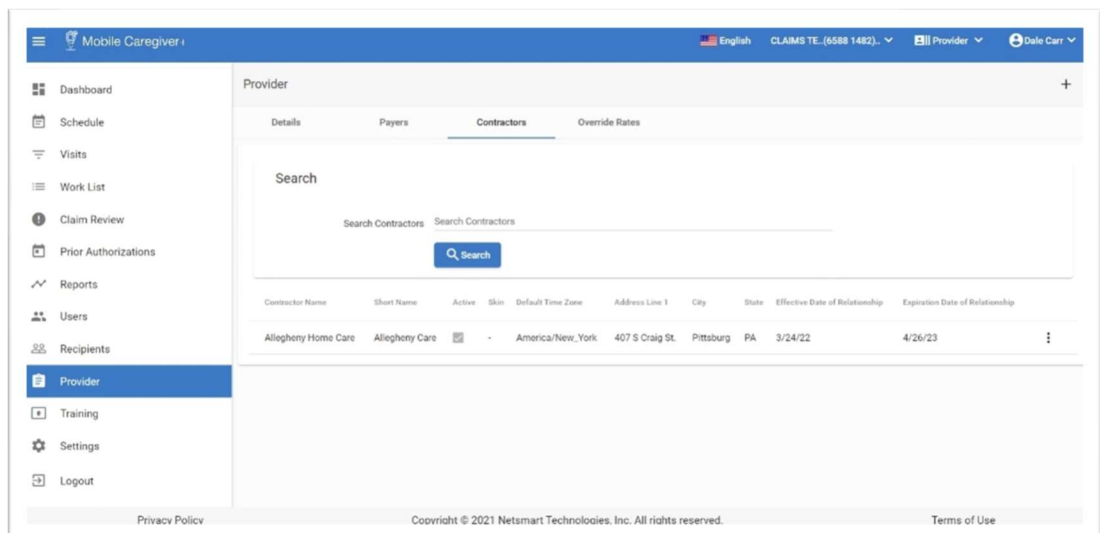
10.4.1. Searching for a Contractor

To find a Contractor:

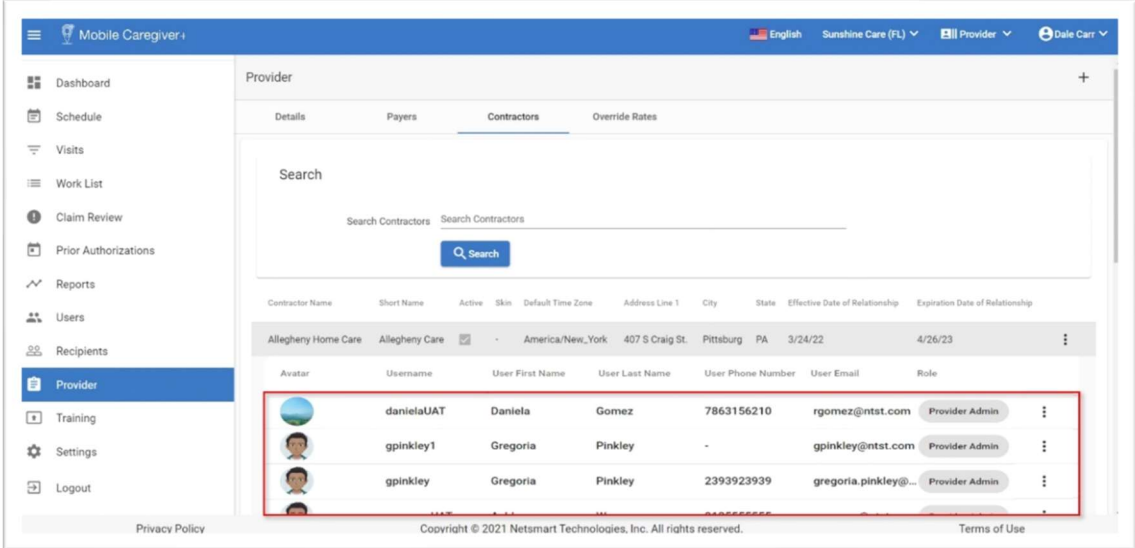
- i. From the Main Menu, click **Provider**.
- ii. Click on the **Contractors** tab.



- iii. Enter all or part of the Contractor's name in the Search Contractor field.
- iv. Click the blue **Search** command.



- v. Click on a Contractor's records to see the list of registered Mobile Caregiver+ User accounts.



The screenshot shows the 'Provider' section of the Mobile Caregiver+ portal. The 'Contractors' tab is selected, displaying a search bar and a table of contractor records. The first contractor, 'Allegheny Home Care', is expanded to show a list of registered user accounts. A red box highlights this list of users.

Contractor Name	Short Name	Active	Skin	Default Time Zone	Address Line 1	City	State	Effective Date of Relationship	Expiration Date of Relationship
Allegheny Home Care	Allegheny Care	<input checked="" type="checkbox"/>	-	America/New_York	407 S Craig St.	Pittsburg	PA	3/24/22	4/26/23

Avatar	Username	User First Name	User Last Name	User Phone Number	User Email	Role
	danielaUAT	Daniela	Gomez	7863156210	rgomez@ntst.com	Provider Admin
	gpinkley1	Gregoria	Pinkley	-	gpinkley@ntst.com	Provider Admin
	gpinkley	Gregoria	Pinkley	2393923939	gregoria.pinkley@...	Provider Admin



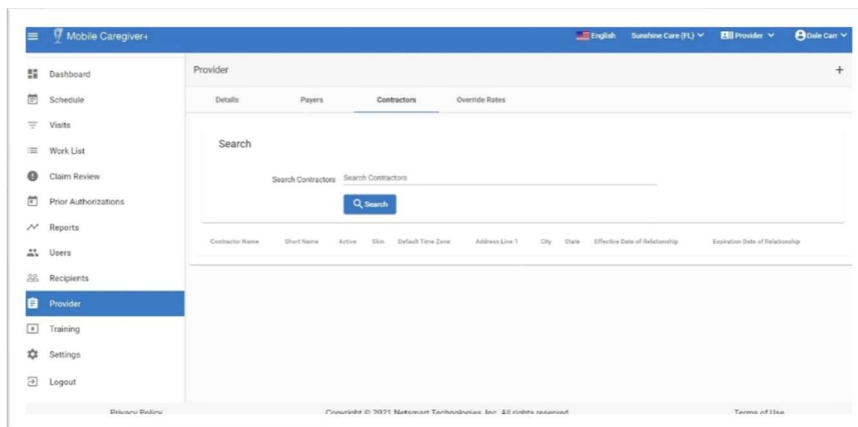
10.4.2. Linking a Provider to a Contractor

Netsmart 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 schedule visits for them.

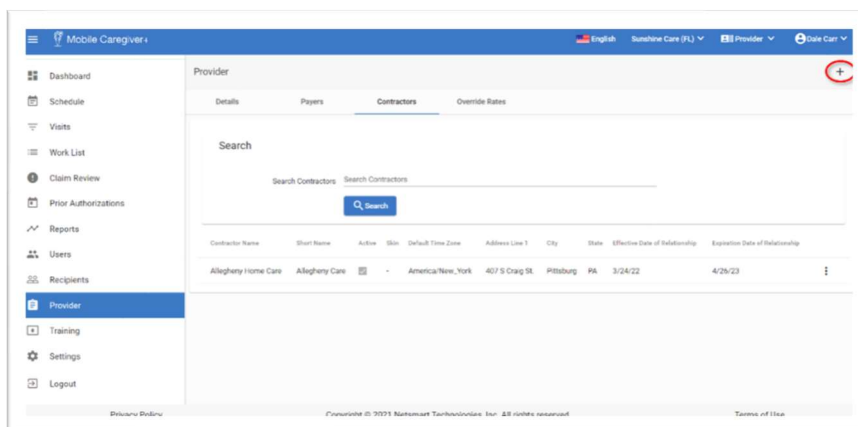
Note: You can only link to Contractors (Providers) that already exist in the Mobile Caregiver+ System.

To link your agency with a Contractor:

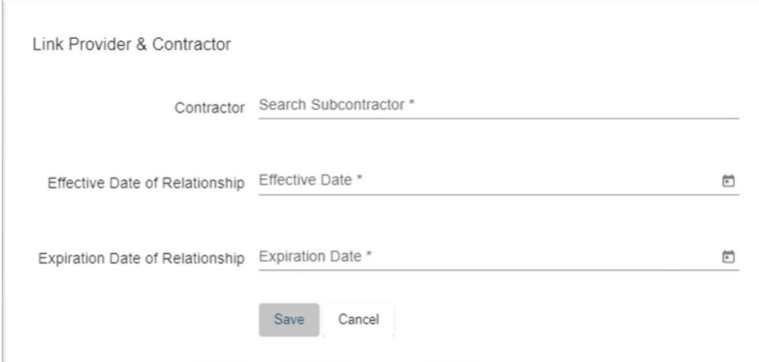
- i. If your account is linked to multiple locations, click the agency name in the Navigation Bar to select the agency/location you want to link to a Payer.
- ii. From the Main Menu, click **Provider**.
- iii. Click on the **Contractors** tab.



- iv. Click the Add icon, **+**, located in the upper-right corner of the screen.





- v. Click in the **Contractor** field, search for, and select a contractor from the list.



Link Provider & Contractor

Contractor

Effective Date of Relationship 

Expiration Date of Relationship 

- vi. Manually type in or click the calendar icon and select the **Effective Date of Relationship** and enter the effective start date.
- vii. Manually type in or click the calendar icon and select the **Expiration Date of Relationship** and enter the expiration date.

Note: Contractors will be able to add Users. They will have access to your Recipients and will be able to schedule visits for them during this period only.

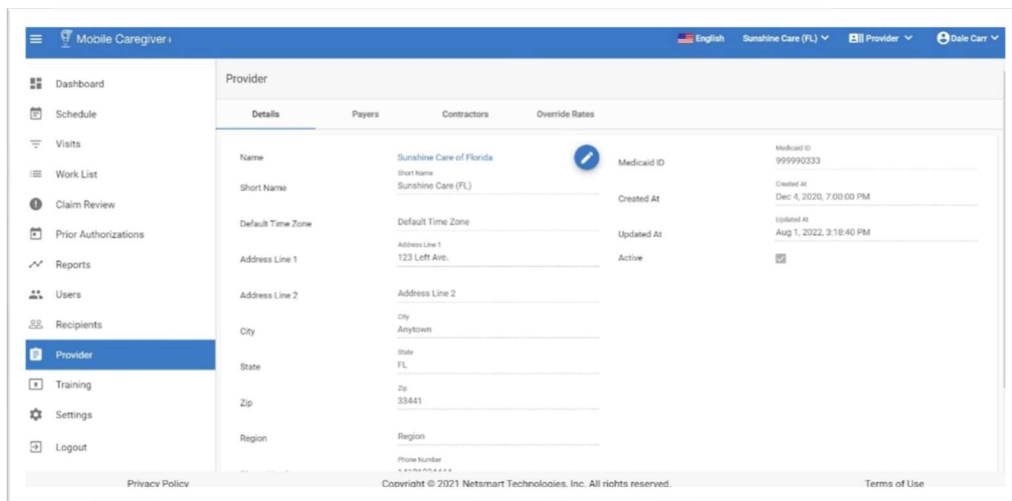
- viii. Click the blue **Save** command to link the contractor to your agency.

10.4.3. Deleting a Contractor

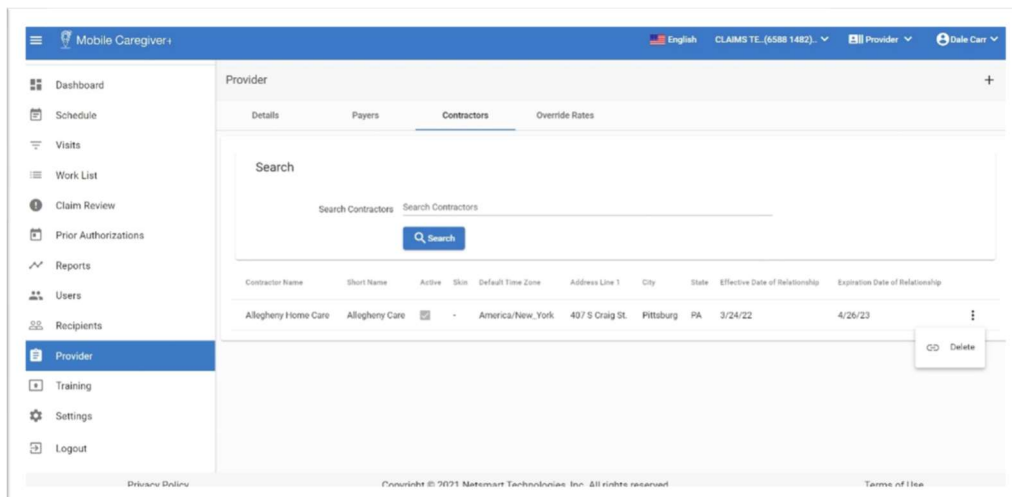
You can delete a Contractor at any time; when you do, they will no longer have access to your Recipients and can no longer schedule visits for them.

To delete a Contractor:

- i. If your account is linked to multiple locations, click the agency name in the Navigation Bar to select the agency/location you want to link to a Payer.
- ii. From the Main Menu, click **Provider**.



- iii. Click on the **Contractors** tab.
- iv. Click Actions icon, ⋮, for the Contractor you want to delete.
- v. From the shortcut submenu, click **Delete**.



10.5. Managing Payer Override Rates

In order to accurately bill Payers, Netsmart allows Provider Agencies to add custom billing rates for rendered services, Override Rates, to the Mobile Caregiver+ Provider Portal.

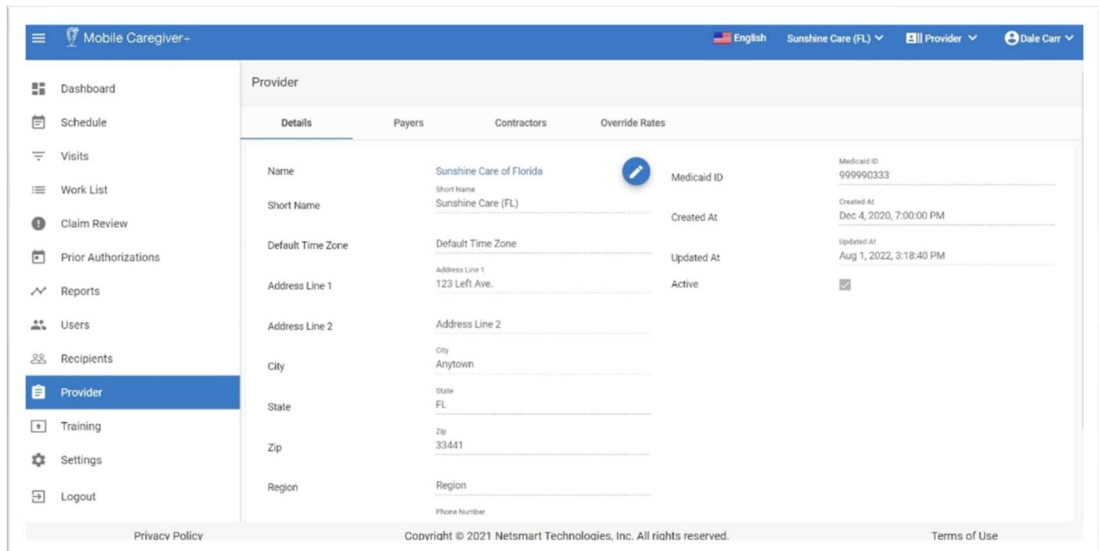
Warning: Providers must ensure that the effective date range for any custom Override Rate being added does not overlap with the effective date range for any existing Override Rate entry for the same Procedure Code + Modifiers – The system will not allow Providers to add overlapping Override Rates.

10.5.1. Searching for a Specific Payer Override Rate

The Netsmart Mobile Caregiver+ Provider Portal will not allow Providers to enter Override with overlapping effective dates. It is recommended that Providers search for existing Override Rate entries before adding a new Override Rate entry.

To search for an existing Override Rate:

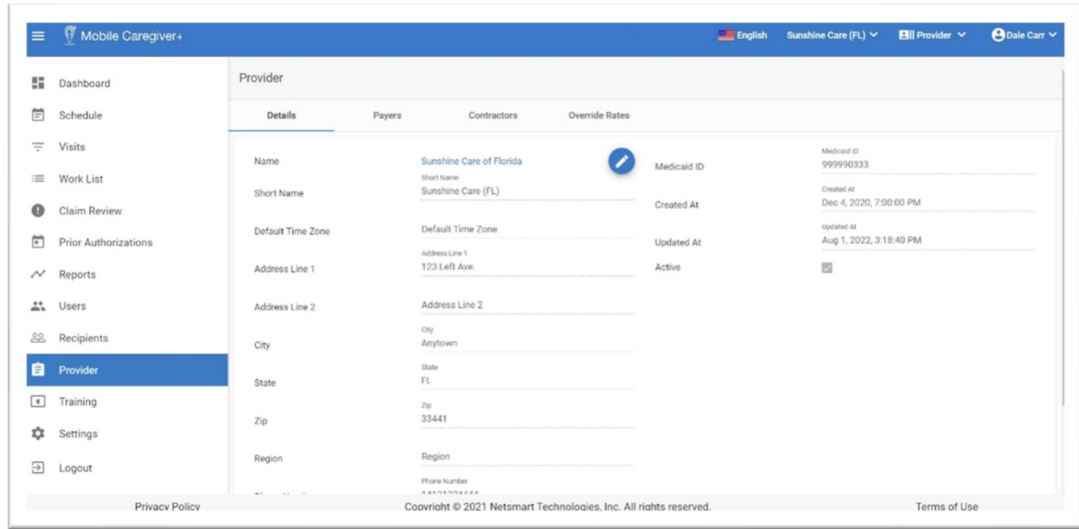
- i. From the Main Menu, click **Provider**.



The screenshot shows the 'Provider' details page in the Mobile Caregiver+ Provider Portal. The page is titled 'Provider' and has a navigation menu on the left with options: Dashboard, Schedule, Visits, Work List, Claim Review, Prior Authorizations, Reports, Users, Recipients, **Provider** (selected), Training, Settings, and Logout. The main content area is divided into four tabs: Details, Payers, Contractors, and Override Rates. The 'Details' tab is active, showing the following information for 'Sunshine Care of Florida':

Name	Sunshine Care of Florida	Medicaid ID	999990333
Short Name	Sunshine Care (FL)	Created At	Dec 4, 2020, 7:00:00 PM
Default Time Zone	Default Time Zone	Updated At	Aug 1, 2022, 3:18:40 PM
Address Line 1	123 Left Ave.	Active	<input checked="" type="checkbox"/>
Address Line 2	Address Line 2		
City	Anytown		
State	FL		
Zip	33441		
Region	Region		
	Phone Number		

At the bottom of the page, there are links for 'Privacy Policy', 'Copyright © 2021 Netsmart Technologies, Inc. All rights reserved.', and 'Terms of Use'.



- ii. Click in the **Payer** field and select the Payer you are adding the custom rate for.
- iii. Click in the **Procedure Code + Modifiers** to select the Service Code, including any applicable Modifier(s).

Note: By default, the system will not display Override Rates that are inactive based on the start/end dates. In order to search for inactive Override Rates, Providers must click in the Active/Inactive field and select either Inactive or All.

- iv. Enter any other optional filter parameters.
- v. Click the blue **Search** command.

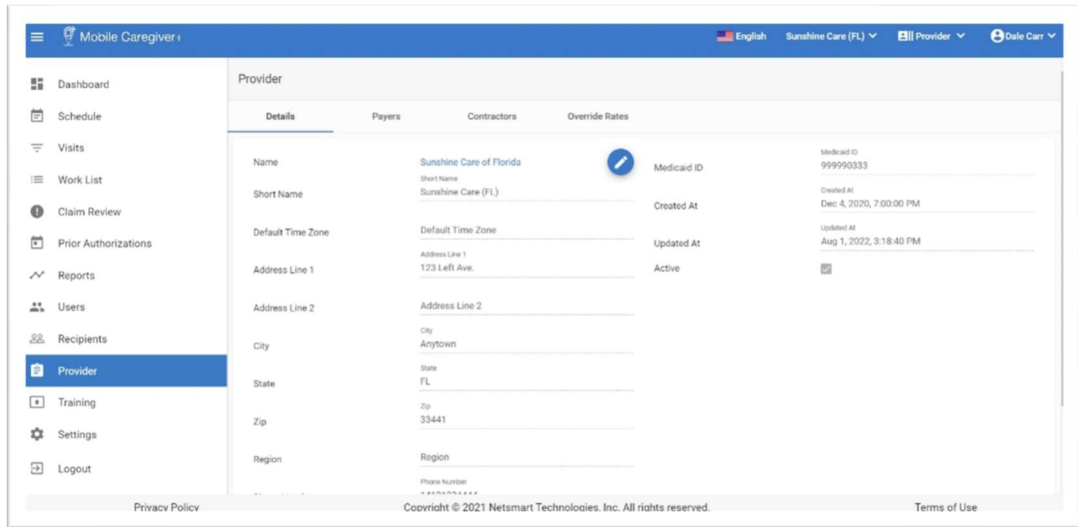
Note: You may have to scroll down to see the complete list of results.

10.5.2. Adding a Payer Override Rate

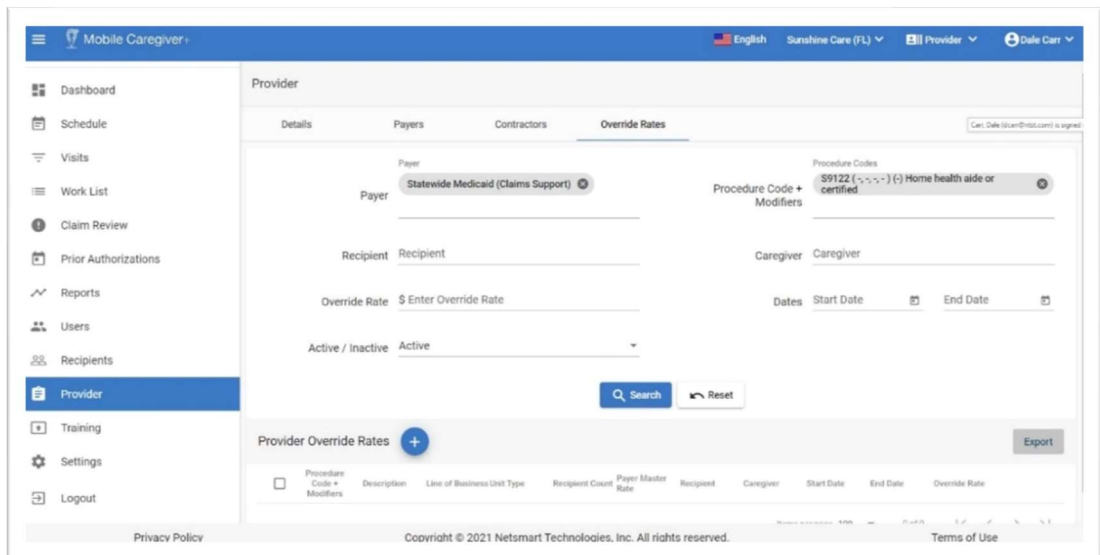
The Netsmart Mobile Caregiver+ Provider Portal will not allow Providers to enter overlapping Override Entries. It is recommended that Providers search for existing Override Rate entries before adding a new Override Rate entry.

To add an override rate:

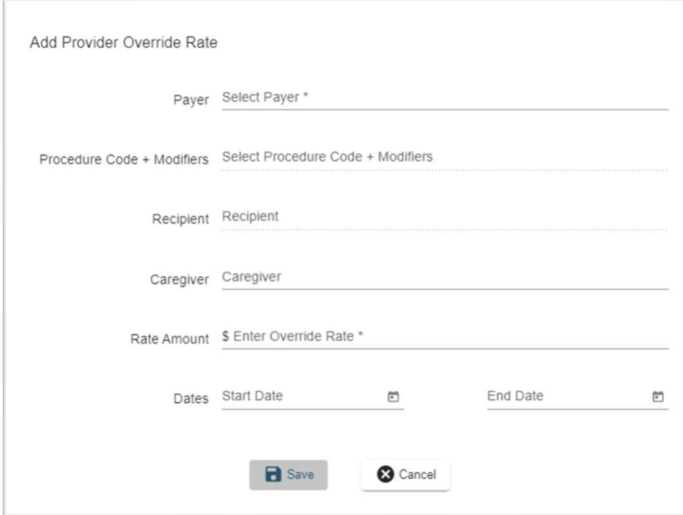
- i. If your account is linked to multiple locations, click the agency name in the Navigation Bar to select the agency/location you want to link to a Payer.
- ii. From the Main Menu, click **Provider**.



- iii. Click on the **Override Rates** tab.



- iv. Click the “**Add Provider Override Rates**” icon, , located at bottom left corner of the screen.



- v. Click the **Payer** field and select the Payer whose rates you want to Override.
- vi. Click the **Procedure Code + Modifiers** field to select the service for which you want to add an override rate.
- vii. If applicable, enter the **Recipient** and/or **Caregiver** that the custom rate applies to.
- viii. Click in the **Rate Amount** field and enter the new rate.

Note: The Override rate being entered must either be equal to, or less than, the maximum rate set by the Payer – The custom rate cannot be greater than the maximum rate set by the Payer.

- ix. Manually type in or click the calendar to enter the **Start Date** (effective) for the Override rate.
- x. Manually type in, or click the calendar, to enter the **End Date** for the Override Rate.

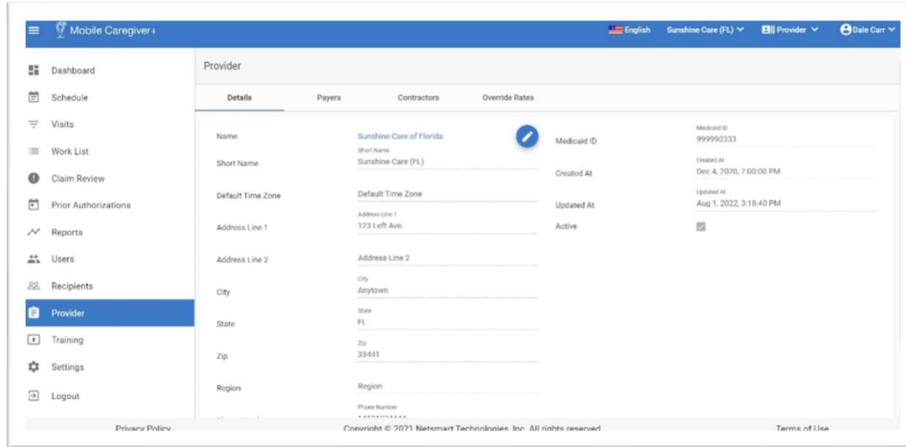
*Note: Providers must ensure that the effective date range for any custom Override Rate being added does not overlap with the effective date range for any existing Override Rate entry for the same **Procedure Code + Modifiers** – The system will not allow Providers to add overlapping Override Rates for the same Service Sode.*

- xi. Click the blue **Save** command.

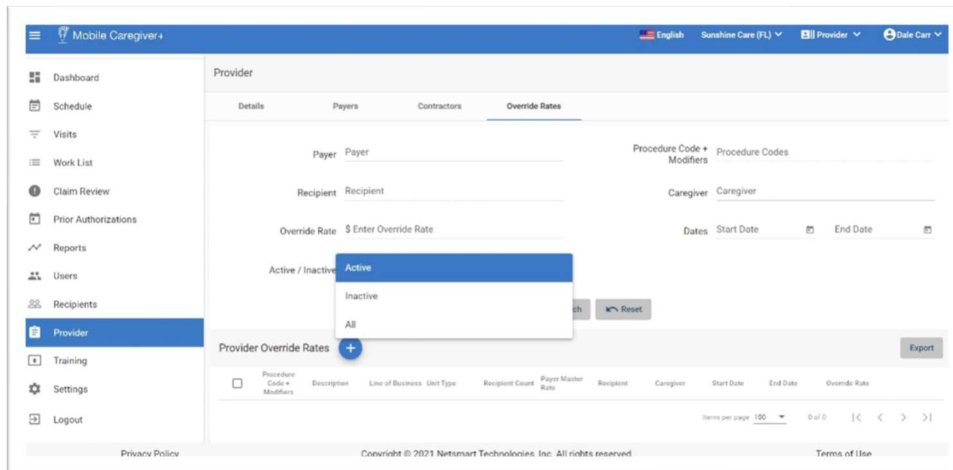
10.5.3. Updating a Payer Override Rate

To update a Payer Override Rate:

- i. From the Main Menu, click **Provider**.



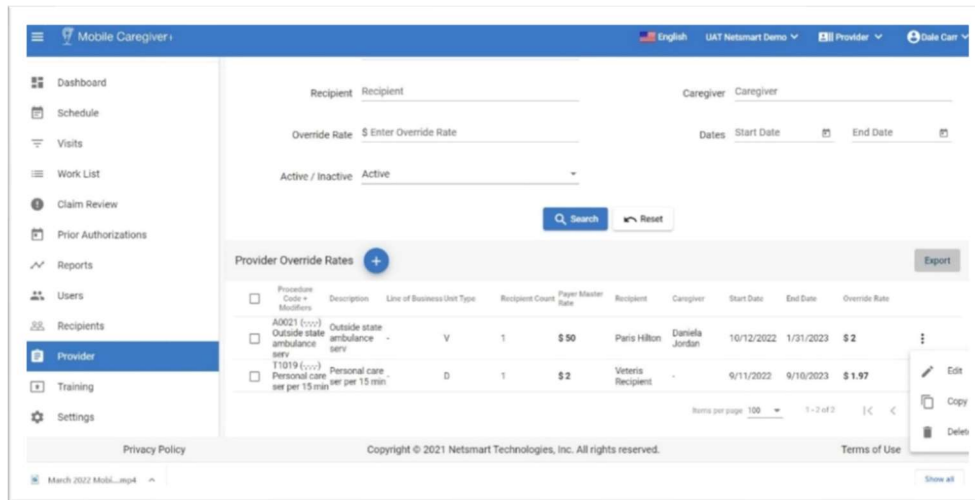
- ii. Click on the **Override Rates** tab.
- iii. Use the field in the header to Search for the override rate you want to update. Select the Payer and any other optional filter parameters.



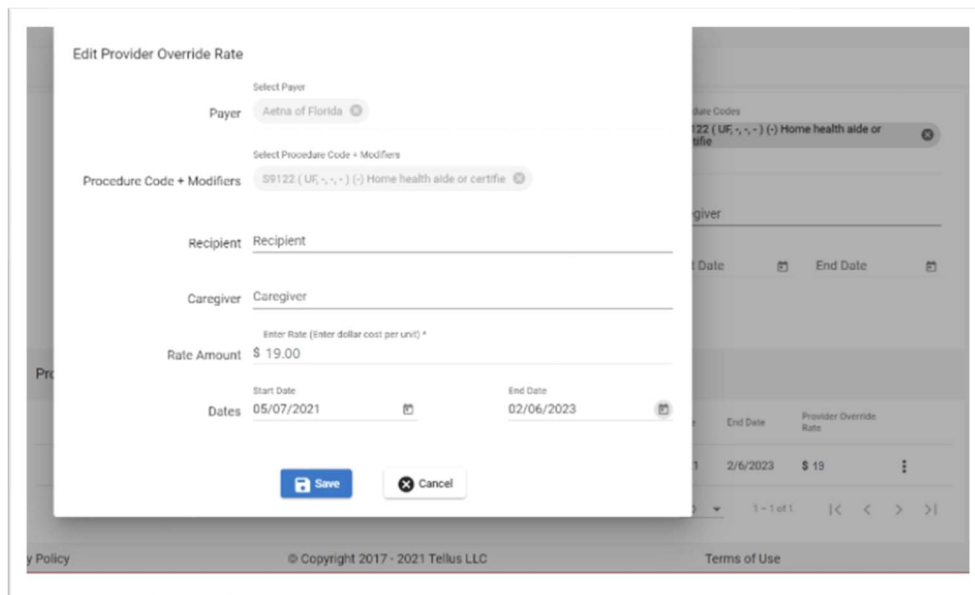
*Note: By default, the system will not display Override Rates that are inactive based on the start/end dates. In order to search for and edit inactive Override Rates, Providers must click in the **Active/Inactive** field and select either **Inactive** or **All**.*

- iv. Click the blue **Search** command.

- v. Click on the Actions icon, ⋮, on the right side of the Override rate you want to edit.
- vi. From the shortcut submenu, click **Edit**.



- vii. Make changes as needed.



- viii. Click the blue **Save** command to save the changes.

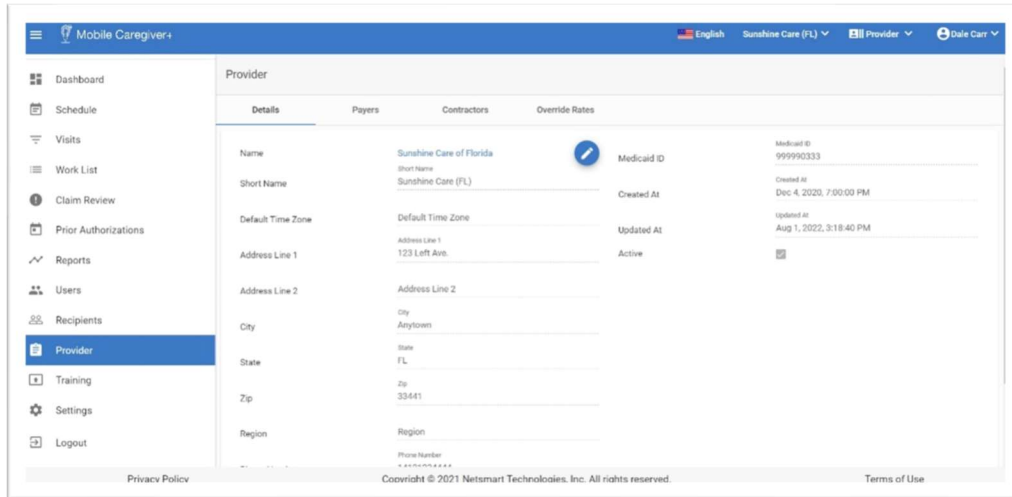
*Note: Providers must ensure that the effective date range for any custom Override Rate being added does not overlap with the effective date range for any existing Override Rate entry for the same **Procedure Code + Modifiers**.*



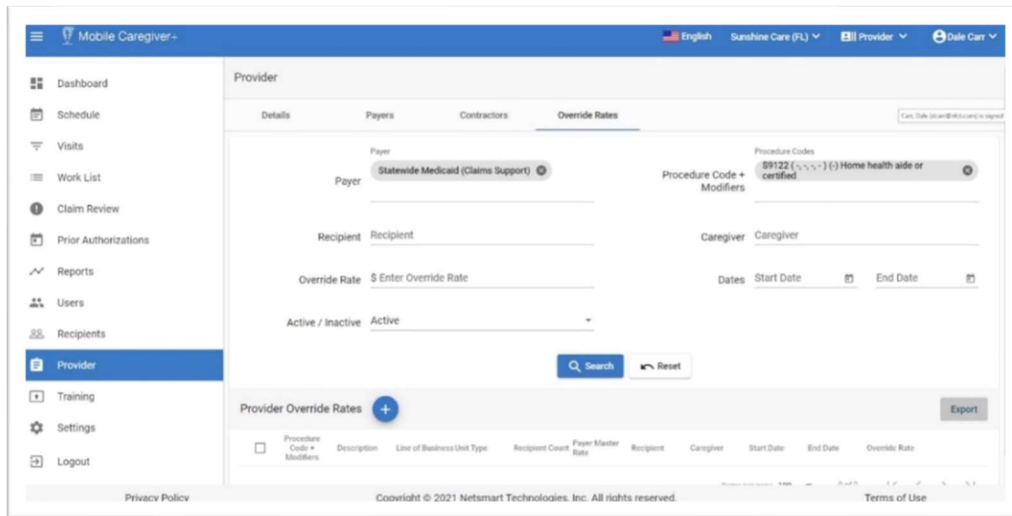
10.5.4. Deleting a Payer Override Rate

To delete a Payer Override Rate:

- i. If your account is linked to multiple locations, click the agency name in the Navigation Bar to select the agency/location you want to link to a Payer.
- ii. From the Main Menu, click **Provider**.



- iii. Click on the **Override Rates** tab.



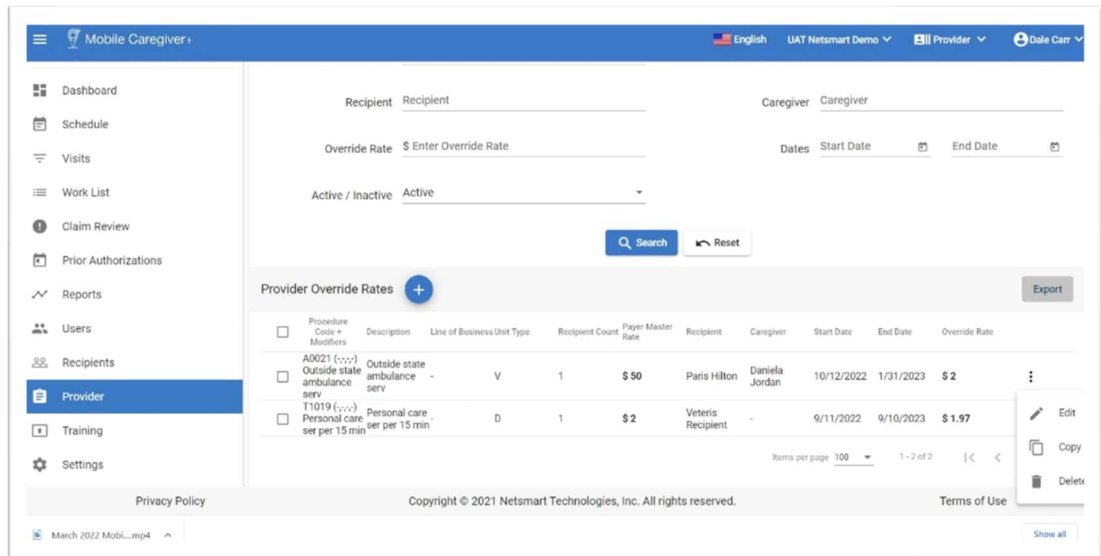
- iv. Use the field in the header to Search for the override rate you want to delete. Select the Payer and any other optional filter parameters.


Note: By default, the system will not display Override Rates that are inactive based on the start/end dates. In order to search for inactive Override Rates,

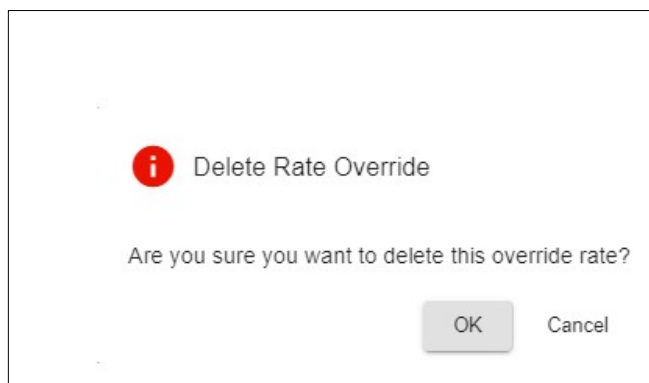


Providers must click in the **Active/Inactive** field and select either **Inactive** or **All**.

- v. Click the blue **Search** command.



- vi. Click on the Actions icon, , on the right side of the Override rate you want to edit.
- vii. From the shortcut submenu, click **Delete**.



- viii. Click **OK** to confirm and delete the Override Rate.

11. Reporting

- Generating a Report
- Exporting a Report
- Mobile Caregiver+ Provider Portal Report List
- Missed Visit Report
- Recipient List Report
- Time Log Report
- User Role Report
- Visit Detail Report
- Visit Detail Report (Virginia Only)
- Visit Report
- Visit Service Reconciliation Report

The Mobile Caregiver+ delivery solutions offer the functionality you need to support your Electronic Visit Verification (EVV) requirements. This powerful technology enables Netsmart clients to verify Provider visits for personal or home-based services. The data collected during personal and home health services enables care Providers to record details of field visits using a mobile phone or special-purpose device. Caregivers record their visit using an app or voice call, including accurate location information, the type of service provided, and the duration of the service.

The Mobile Caregiver+ EVV Solution offers real-time analytic data to enable Providers to review and assess EVV activities.

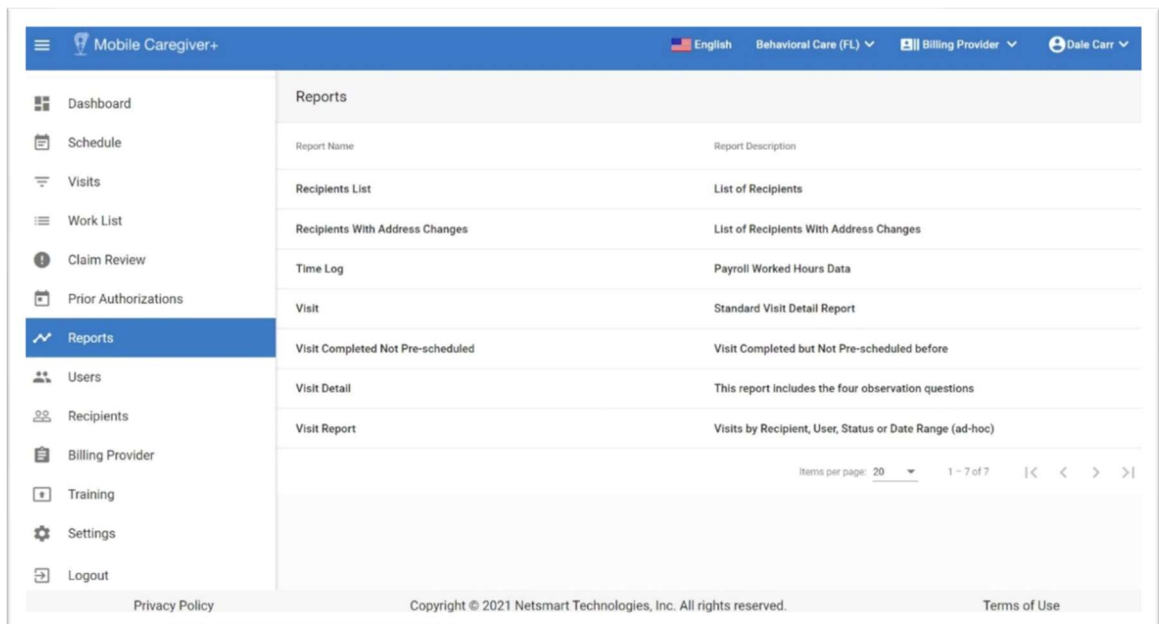
11.1. Generating a Report

The Provider Portal offers several reports, including, but not limited to, the Time Log report that gives you a list of hours worked by a Caregiver, and the Visit Report that lets you see a list of completed tasks for Recipients.

The Time Log report is used as an example in the following instructions, demonstrating 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. From the Main Menu, click **Reports**.



2. Click on the name of the report you want to generate.

Reports > Time Log

Export Zoom in Zoom out

Filter Parameters

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

All None Invert

Preview Report – Current Day's EVV Activity

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		


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Note: The system will generate the Time Log Report based on the current days EVV activity.

3. Configure filter parameters – Use the fields located to the left of the sample report to configure custom filter parameters for your report.
 - 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 drop-down 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 select one or more Recipients to include in the report.




Reports > Time Log

Start Date
 

End Date
 

Recipient

Available: 44
Selected: 4




- Aaron Becker
- Mary Doe
- fernando durand
- Bradley Marte
- Jimmy Marley
- Bob Hammond
- Nikita Buslov
- Chris Fernican
- Beres Brown
- Fred Flintstone

All
 None
 Invert

=

Caregiver

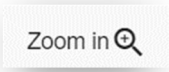
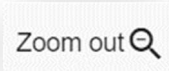
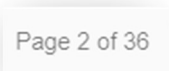




Available: 39
Selected: 0



- Click **All** at the bottom of the list to add all data elements that appear on the Available tab.
- Click **None** to clear all selections.
- Click on individual elements on the Available tab to select and unselect elements that will be included in the report. The total number of selections will be displayed on the Selected tab.
- Click **Invert** to “flip-flop” between selected and unselected items.



4. Scroll down and click the blue **Apply** command to generate the report.
5. 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](#).

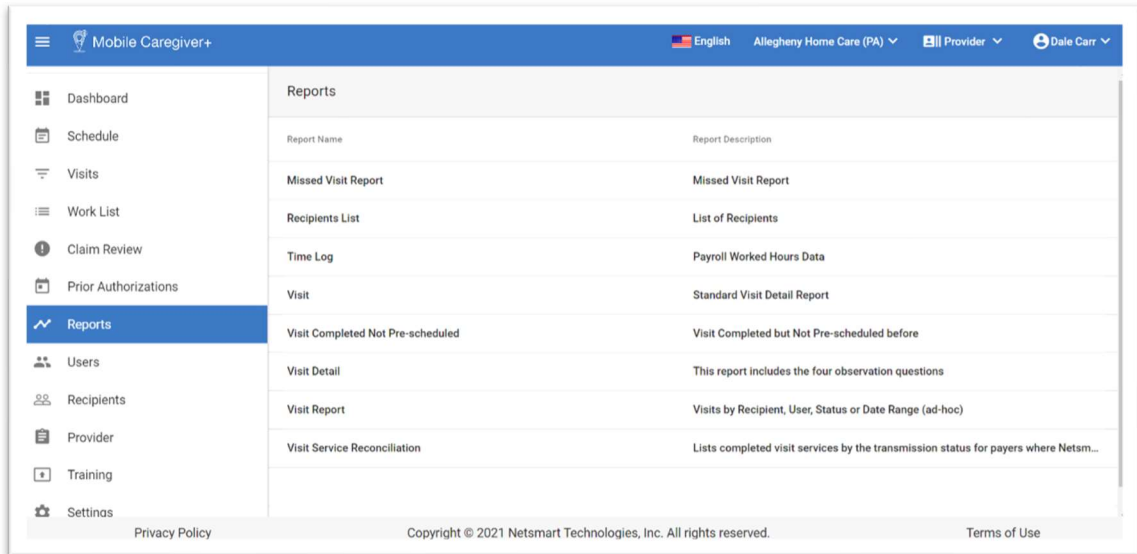
Button	Description
	Zoom in to enlarge report.
	Zoom out to reduce size of report.
	See the number of the page displayed as well as the total number of pages in the report.
	Return to the first page of the report.
	Move back one page.
	Move forward one page.
	Move to last page of the report.



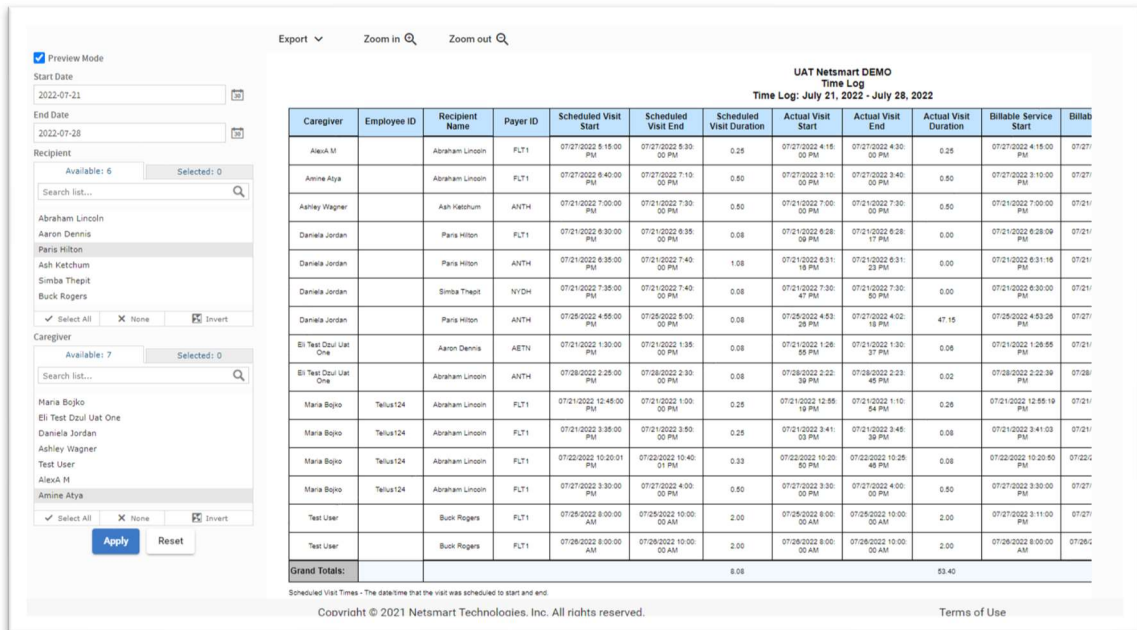
11.2. Exporting a Report

To generate one of the standardized reports:

1. From the Main Menu click **Reports**.



2. Click on the name of the report you want to generate.
3. Use the filters to select the data you want included in your report, and then click **Apply**.





4. Click the **Export** drop-down arrow and select the format for your report.

Reports > Time Log

Preview Mode

Start Date: 2022-07-21

End Date: 2022-07-28

Recipient: Available: 6 Selected: 0

Caregiver: Available: 7 Selected: 0

Export Zoom in Zoom out

PDF
Excel (Paginated)
XLSX (Paginated)

UAT Netsmart DEMO
Time Log
Time Log: July 21, 2022 - July 28, 2022

Employee ID	Recipient Name	Payer ID	Scheduled Visit Start	Scheduled Visit End	Scheduled Visit Duration	Actual Visit Start	Actual Visit End	Actual Visit Duration	Billable Service Start	Bill		
	Abraham Lincoln	FLT1	07/27/2022 8:15:00 PM	07/27/2022 8:30:00 PM	0.25	07/27/2022 4:15:00 PM	07/27/2022 4:30:00 PM	0.25	07/27/2022 4:15:00 PM	07/27/2022 4:30:00 PM		
	Abraham Lincoln	FLT1	07/27/2022 8:40:00 PM	07/27/2022 7:10:00 PM	0.50	07/27/2022 3:10:00 PM	07/27/2022 3:40:00 PM	0.50	07/27/2022 3:10:00 PM	07/27/2022 3:40:00 PM		
	Ashley Wagner	Ash Ketchum	ANTH	07/21/2022 7:00:00 PM	07/21/2022 7:30:00 PM	0.50	07/21/2022 7:00:00 PM	07/21/2022 7:30:00 PM	0.50	07/21/2022 7:00:00 PM	07/21/2022 7:30:00 PM	
	Dameka Jordan	Paris Hilton	FLT1	07/21/2022 8:30:00 PM	07/21/2022 8:35:00 PM	0.08	07/21/2022 8:28:06 PM	07/21/2022 8:28:17 PM	0.00	07/21/2022 8:28:06 PM	07/21/2022 8:28:06 PM	
	Dameka Jordan	Paris Hilton	ANTH	07/21/2022 8:35:00 PM	07/21/2022 7:40:00 PM	1.08	07/21/2022 8:31:18 PM	07/21/2022 8:31:23 PM	0.00	07/21/2022 8:31:18 PM	07/21/2022 8:31:18 PM	
	Dameka Jordan	Simba Thepit	NYDH	07/21/2022 7:35:00 PM	07/21/2022 7:40:00 PM	0.08	07/21/2022 7:30:47 PM	07/21/2022 7:30:50 PM	0.00	07/21/2022 8:30:00 PM	07/21/2022 8:30:00 PM	
	Dameka Jordan	Paris Hilton	ANTH	07/25/2022 4:55:00 PM	07/25/2022 5:00:00 PM	0.08	07/25/2022 4:53:28 PM	07/27/2022 4:02:18 PM	47.15	07/25/2022 4:53:28 PM	07/27/2022 4:02:18 PM	
	Eli Test Dzul Uat One	Aaron Dennis	AETN	07/21/2022 1:30:00 PM	07/21/2022 1:35:00 PM	0.08	07/21/2022 1:28:37 PM	07/21/2022 1:30:37 PM	0.08	07/21/2022 1:28:55 PM	07/21/2022 1:30:37 PM	
	Eli Test Dzul Uat One	Abraham Lincoln	ANTH	07/28/2022 2:25:00 PM	07/28/2022 2:30:00 PM	0.08	07/28/2022 2:22:39 PM	07/28/2022 2:23:45 PM	0.02	07/28/2022 2:22:39 PM	07/28/2022 2:23:45 PM	
	Maria Bojko	Tellus124	Abraham Lincoln	FLT1	07/21/2022 12:45:00 PM	07/21/2022 1:00:00 PM	0.25	07/21/2022 12:55:19 PM	07/21/2022 1:10:54 PM	0.28	07/21/2022 12:55:19 PM	07/21/2022 1:10:54 PM
	Maria Bojko	Tellus124	Abraham Lincoln	FLT1	07/21/2022 3:35:00 PM	07/21/2022 3:50:00 PM	0.25	07/21/2022 3:41:03 PM	07/21/2022 3:45:39 PM	0.08	07/21/2022 3:41:03 PM	07/21/2022 3:45:39 PM
	Maria Bojko	Tellus124	Abraham Lincoln	FLT1	07/22/2022 10:20:01 AM	07/22/2022 10:40:00 PM	0.33	07/22/2022 10:20:50 PM	07/22/2022 10:25:49 PM	0.08	07/22/2022 10:20:50 PM	07/22/2022 10:25:49 PM
	Maria Bojko	Tellus124	Abraham Lincoln	FLT1	07/27/2022 3:30:00 PM	07/27/2022 4:00:00 PM	0.50	07/27/2022 3:30:00 PM	07/27/2022 4:00:00 PM	0.50	07/27/2022 3:30:00 PM	07/27/2022 4:00:00 PM
	Test User	Buck Rogers	FLT1	07/28/2022 8:00:00 AM	07/28/2022 10:00:00 AM	2.00	07/28/2022 8:00:00 AM	07/28/2022 10:00:00 AM	2.00	07/27/2022 3:11:00 PM	07/27/2022 3:11:00 PM	
	Test User	Buck Rogers	FLT1	07/28/2022 8:00:00 AM	07/28/2022 10:00:00 AM	2.00	07/28/2022 8:00:00 AM	07/28/2022 10:00:00 AM	2.00	07/28/2022 8:00:00 AM	07/28/2022 8:00:00 AM	

5. Click on the download indicator to open the report.

Mobile Caregiver+

English UAT Netsmart Demo Provider Dale Carr

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

Reports > Time Log

Preview Mode

Start Date: 2022-07-21

End Date: 2022-07-28

Recipient: Available: 6 Selected: 0

Caregiver: Available: 7 Selected: 0

Export Zoom in Zoom out

UAT Netsmart DEMO
Time Log
Time Log: July 21, 2022 - July 28, 2022

Caregiver	Employee ID	Recipient Name	Payer ID	Scheduled Visit Start	Scheduled Visit End	Scheduled Visit Duration	Actual Visit Start	Actual Visit End	Actual Visit Duration	Billable Service Start	Bill	
Alexa M		Abraham Lincoln	FLT1	07/27/2022 8:15:00 PM	07/27/2022 8:30:00 PM	0.25	07/27/2022 4:15:00 PM	07/27/2022 4:30:00 PM	0.25	07/27/2022 4:15:00 PM	07/27/2022 4:30:00 PM	
Amine Alya		Abraham Lincoln	FLT1	07/27/2022 8:40:00 PM	07/27/2022 7:10:00 PM	0.50	07/27/2022 3:10:00 PM	07/27/2022 3:40:00 PM	0.50	07/27/2022 3:10:00 PM	07/27/2022 3:40:00 PM	
Ashley Wagner		Ash Ketchum	ANTH	07/21/2022 7:00:00 PM	07/21/2022 7:30:00 PM	0.50	07/21/2022 7:00:00 PM	07/21/2022 7:30:00 PM	0.50	07/21/2022 7:00:00 PM	07/21/2022 7:30:00 PM	
Dameka Jordan		Paris Hilton	FLT1	07/21/2022 8:30:00 PM	07/21/2022 8:35:00 PM	0.08	07/21/2022 8:28:06 PM	07/21/2022 8:28:17 PM	0.00	07/21/2022 8:28:06 PM	07/21/2022 8:28:06 PM	
Dameka Jordan		Paris Hilton	ANTH	07/21/2022 8:35:00 PM	07/21/2022 7:40:00 PM	1.08	07/21/2022 8:31:18 PM	07/21/2022 8:31:23 PM	0.00	07/21/2022 8:31:18 PM	07/21/2022 8:31:18 PM	
Dameka Jordan		Simba Thepit	NYDH	07/21/2022 7:35:00 PM	07/21/2022 7:40:00 PM	0.08	07/21/2022 7:30:47 PM	07/21/2022 7:30:50 PM	0.00	07/21/2022 8:30:00 PM	07/21/2022 8:30:00 PM	
Dameka Jordan		Paris Hilton	ANTH	07/25/2022 4:55:00 PM	07/25/2022 5:00:00 PM	0.08	07/25/2022 4:53:28 PM	07/27/2022 4:02:18 PM	47.15	07/25/2022 4:53:28 PM	07/27/2022 4:02:18 PM	
Eli Test Dzul Uat One		Aaron Dennis	AETN	07/21/2022 1:30:00 PM	07/21/2022 1:35:00 PM	0.08	07/21/2022 1:28:37 PM	07/21/2022 1:30:37 PM	0.08	07/21/2022 1:28:55 PM	07/21/2022 1:30:37 PM	
Eli Test Dzul Uat One		Abraham Lincoln	ANTH	07/28/2022 2:25:00 PM	07/28/2022 2:30:00 PM	0.08	07/28/2022 2:22:39 PM	07/28/2022 2:23:45 PM	0.02	07/28/2022 2:22:39 PM	07/28/2022 2:23:45 PM	
Maria Bojko		Tellus124	Abraham Lincoln	FLT1	07/21/2022 12:45:00 PM	07/21/2022 1:00:00 PM	0.25	07/21/2022 12:55:19 PM	07/21/2022 1:10:54 PM	0.28	07/21/2022 12:55:19 PM	07/21/2022 1:10:54 PM
Maria Bojko		Tellus124	Abraham Lincoln	FLT1	07/21/2022 3:35:00 PM	07/21/2022 3:50:00 PM	0.25	07/21/2022 3:41:03 PM	07/21/2022 3:45:39 PM	0.08	07/21/2022 3:41:03 PM	07/21/2022 3:45:39 PM
Maria Bojko		Tellus124	Abraham Lincoln	FLT1	07/22/2022 10:20:01 AM	07/22/2022 10:40:00 PM	0.33	07/22/2022 10:20:50 PM	07/22/2022 10:25:49 PM	0.08	07/22/2022 10:20:50 PM	07/22/2022 10:25:49 PM
Maria Bojko		Tellus124	Abraham Lincoln	FLT1	07/27/2022 3:30:00 PM	07/27/2022 4:00:00 PM	0.50	07/27/2022 3:30:00 PM	07/27/2022 4:00:00 PM	0.50	07/27/2022 3:30:00 PM	07/27/2022 4:00:00 PM
Test User		Buck Rogers	FLT1	07/28/2022 8:00:00 AM	07/28/2022 10:00:00 AM	2.00	07/28/2022 8:00:00 AM	07/28/2022 10:00:00 AM	2.00	07/27/2022 3:11:00 PM	07/27/2022 3:11:00 PM	
Test User		Buck Rogers	FLT1	07/28/2022 8:00:00 AM	07/28/2022 10:00:00 AM	2.00	07/28/2022 8:00:00 AM	07/28/2022 10:00:00 AM	2.00	07/28/2022 8:00:00 AM	07/28/2022 8:00:00 AM	

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payroll_report (2).pdf

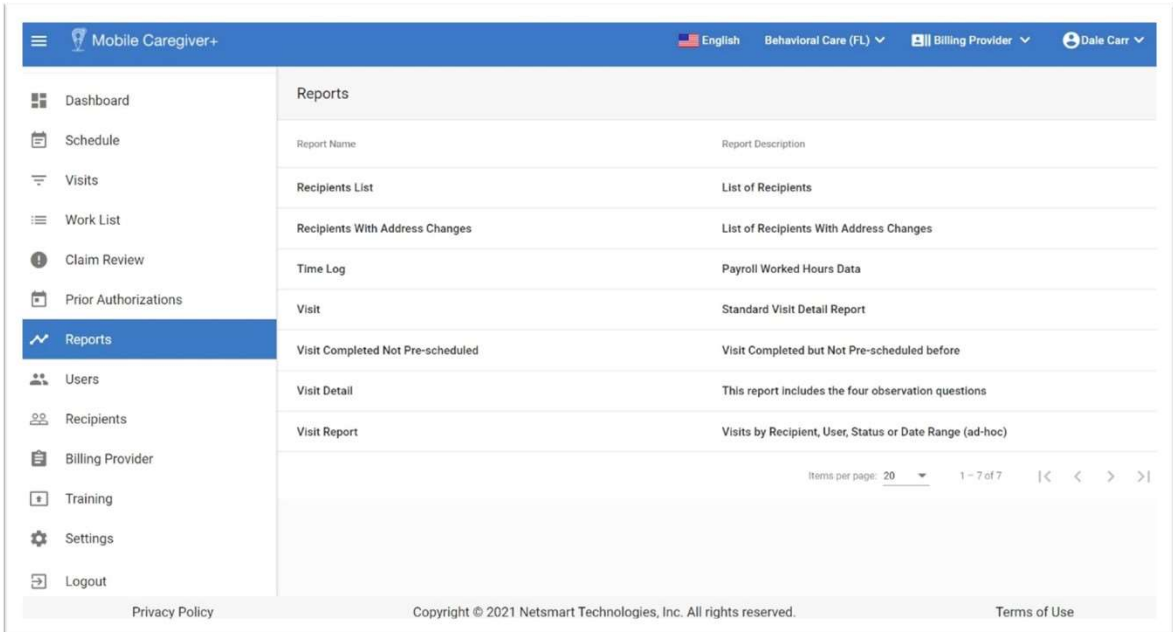
Show all



11.3. Mobile Caregiver+ Provider Portal Report List

The Mobile Caregiver+ EVV Solution offers a variety of real-time analytic reports to enable Provider to review and assess EVV activities.

1. From the Main Menu, Providers can click on **Reports** to view the Mobile Caregiver+ Reports List. Depending on their objectives, Providers can select, customize, run, and export reports.



The screenshot displays the 'Reports' section of the Mobile Caregiver+ Provider Portal. The interface includes a top navigation bar with the user's name 'Dale Carr' and various settings. A left sidebar menu lists navigation options, with 'Reports' highlighted. The main content area is titled 'Reports' and contains a table of available reports.

Report Name	Report Description
Recipients List	List of Recipients
Recipients With Address Changes	List of Recipients With Address Changes
Time Log	Payroll Worked Hours Data
Visit	Standard Visit Detail Report
Visit Completed Not Pre-scheduled	Visit Completed but Not Pre-scheduled before
Visit Detail	This report includes the four observation questions
Visit Report	Visits by Recipient, User, Status or Date Range (ad-hoc)

At the bottom of the report list, there is a pagination control showing 'Items per page: 20' and '1 - 7 of 7'.



11.3.2. Missed Visit Report

Providers can use the Missed Visit Report to view analytic data for canceled visits, including the reasons for canceling visits and actions taken.

The Missed Visit Report allows Providers to view analytics for canceled visits to identify the most commonly selected reasons and actions taken for canceled visits. This information provides insights related to potential causes of "non-adherence" to treatment plans, including but not limited to identifying Caregivers and/or Recipients with high numbers of canceled visits.

By default, the Missed Visit Report displays analytic data for visits that were canceled for the current day.

The report will the display following data for each visit: Recipient Last Name, Recipient First Name, Recipient Medicaid ID, Recipient Member ID, Recipient DOB, Recipient Diagnosis Code, Payer, Service Code, Visit ID, Caregiver, Scheduled Start, Scheduled End, Missed Visit Reason Code, Missed Visit Reasons Notes, Missed Visit Action, Missed Visit Action Notes.

Providers can customize the default report using the controls on the left to select the following parameters:

- The Start Date and End Date for Missed visits.
- Caregiver(s).
- Recipient(s).
- Missed Visit Reason(s).
- Missed Visit Action(s).

MISSED VISITS REPORT
Date Range: March 1, 2022 - June 21, 2022
Report Date: 06/21/22

Record Count	Recipient Last Name	Recipient First Name	Recipient Medicaid ID	Recipient Member ID	Recipient DOB	Recipient Diagnoses	Payer	Service Code	Visit ID	Caregiver	Scheduled Start	Scheduled End	Missed Visit Reason	Missed Visit Reason Notes	Missed Visit Action	Missed Visit Action Notes
1	Abala	Catherine	111110006		03/31/1985		FLT1	99122	0429269733	Dani Carr	06/10/2022 12:00:00 PM	06/10/2022 1:20:00 PM	OTHR	training	SCHD	training
2	Berry	Della	111110006		10/07/1989		FLT1	99122	2464288079	Dani Carr	04/10/2022 11:00:00 AM	04/10/2022 12:00:00 PM	MCAN	Recipient refused care	SCHD	schholu
3	Marie	Daphia	85871325	987654321	04/05/1986		FLT1	99122	0155891313	Isabella Khari Scheller	04/09/2022 8:00:00 PM	04/09/2022 8:00:00 PM	MCAN	Recipient did not need services this day	SCHD	Reached back for April 4 at same time.
4	Berry	Della	111110006		10/07/1989		FLT1	99122	2248973869	Dani Carr	05/05/2022 11:00:00 AM	05/05/2022 12:00:00 PM	OTHR	arrv prt	OTHR	arrv prt
5	Berry	Della	111110006		10/07/1989		FLT1	99122	2023811133	Dani Carr	06/10/2022 11:00:00 AM	06/10/2022 12:00:00 PM	OTHR	Provider Portal Training	OTHR	Provider Portal Training
6	Berry	Della	111110006		10/07/1989		FLT1	99122	0641207304	Dani Carr	04/08/2022 11:00:00 AM	04/08/2022 12:00:00 PM	MCAN	Provider Portal Training	OTHR	Provider Portal Training



11.3.3. Recipient List Report

Providers can use the Recipient List Report to view demographic data for all active Recipients that are enrolled with an agency. This is a census report that can be used to view and audit the count and accuracy of the MCG+ profiles for Recipients that are enrolled with a Provider Agency.

The Recipient List Report will display the following data for each record: Recipient Name, Date of Birth, Gender, Recipient Address, Recipient Phone Number, Emergency Contact Name, Emergency Contact Phone.

Providers can customize the default report using the controls on the left to select the following parameters:

- Recipient(s).
- Gender.

Recipient List

Account Name	R.Count	Recipient Name	Date of birth	Gender	Recipient Address	Recipient Phone Number	Emergency Contact Name	Emergency Contact Phone
Sunshine Care of Florida								
	1	Anna Adeniji	Oct 3, 1983	FEMALE				
	2	Anna Adeniji	Oct 3, 1983	FEMALE	3651 FAU Boulevard Boca Raton FL 33431	(305) 745-4040	Adele Smith	3087845454
	3	Betsy Roethlisberger	Nov 15, 1951	FEMALE				
	4	Betsy Roethlisberger	Nov 15, 1951	FEMALE				
	5	Buck Rogers	Jul 4, 1945	MALE	800 Fairway Drive Deerfield Beach FL 33441	(561) 856-8789	Wilma Deering	15556506789
	6	Cadence Alualu	Mar 31, 1955	FEMALE				



11.3.4. Time Log Report

Provider can use the Time Log Report to view scheduled, actual, and billable time log data reported by Caregiver for completed visits.

By default, the Time Log Report displays the time reported time log for visit completed in the current day by scheduled, actual, and billable date and time.

The report will display the following data for each completed visit: Caregiver, Employee ID, Recipient Name, Payer ID, Scheduled Start, Scheduled End, Scheduled Hours, Actual Start Time, Actual End Time, Actual Hours, Billable Start Time, Billable End Time, Billable Hours, Billable-Actual Service Duration.

Providers can customize the default report using the controls on the left to select the following parameters:

- The Start Date and End Date for completed visits.
- Recipient(s).
- Caregiver(s).

UAT Netsmart DEMO
Time Log
Time Log: July 27, 2022 - July 27, 2022

Caregiver	Employee ID	Recipient Name	Payer ID	Scheduled Visit Start	Scheduled Visit End	Scheduled Visit Duration	Actual Visit Start	Actual Visit End	Actual Visit Duration	Billable Service Start	Billable Service End	Billable Service Duration	Billable-Actual Service Duration
AlexA M		Abraham Lincoln	FLT1	07/27/2022 5:15:00 PM	07/27/2022 5:30:00 PM	0.25	07/27/2022 4:15:00 PM	07/27/2022 4:30:00 PM	0.25	07/27/2022 4:15:00 PM	07/27/2022 4:30:00 PM	0.25	0.00
Amine Aya		Abraham Lincoln	FLT1	07/27/2022 6:40:00 PM	07/27/2022 7:10:00 PM	0.50	07/27/2022 3:10:00 PM	07/27/2022 3:40:00 PM	0.50	07/27/2022 3:10:00 PM	07/27/2022 3:40:00 PM	0.50	0.00
Maria Bojko	Tellus124	Abraham Lincoln	FLT1	07/27/2022 3:30:00 PM	07/27/2022 4:00:00 PM	0.50	07/27/2022 3:30:00 PM	07/27/2022 4:00:00 PM	0.50	07/27/2022 3:30:00 PM	07/27/2022 4:00:00 PM	0.50	0.00
Grand Totals:						1.25			1.25			1.25	0.00

Scheduled Visit Times - The date/time that the visit was scheduled to start and end.
Actual Visit Times - The date/time that the EVV solution captured for visit check-in & check-out.
Billable Times - The date/time that is to be submitted on the claim, may be adjusted by the billing provider.



11.3.6. Visit Detail Report

The Visit Report allows Providers to view and print a page-per-day report for a selected Caregiver and Recipient specific to the service delivered. The report will display all service details for individually completed visits, including: Provider (agency name), Caregiver, first-last name), Recipient (first-last name), HCPCS/Mods (scheduled services), Completed Tasks, Actual Start Time (actual date and time visit started), Actual End Time, (actual date and time visit ended), Duration (calculated field), Scheduled Start Time (date and time), Scheduled End Time (date and time), Start Verification Type (technology used to record visit start location), End Verification Type (technology used to record visit end location), Start Address, End Address, Start Variance (calculated measure-distance away from scheduled location where visit started), End Variance (calculated measure-distance away from scheduled location where visit ended), Start Address Type (type dwelling or structure), End Address Type (type dwelling or structure), Additional Note (visit notes), Signature (copy of Recipient’s and Caregiver’s signature or reason selected for not collecting signature).

This report can be printed to add additional signatures.

Provider must configure and select the following report parameters to filter and display the Visit Reports for specific visits:

- The Start Date and End Date for the completed visits.
- Caregiver.
- Recipient.

Reports > Visit

Start Date

End Date

Caregiver

Recipient

Export Zoom in Zoom out

Run Date: 6/21/2022

Visit

Provider: Sunshine Care of Florida


Date Range: 6/1/2022 - 6/21/2022

Visit ID: 3118583346

Status:	COMPLETED	Actual Start Time:	6/11/22 7:00:00 AM
Caregiver:	Test User	Actual End Time:	6/11/22 9:00:00 AM
Recipient:	Don Diego Vega	Duration:	02:00:00
HCPCS Code/Mod(s):	S9122		
Completed Tasks:	Laundry, Supervision		

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Mobile Caregiver+ Provider Portal User Guide



Calculated Measures:



- Duration: Obtained by subtracting the Actual Start Time from the Actual End Time.
Formula: Actual End Time – Actual Start Time.
- Start Variance: Obtained by subtracting the distance of the Actual Start Location from the Scheduled Start Location.
Distance (Miles) of Actual Start location From Scheduled Start Location.


11.3.7. Visit Detail Report (Virginia Only)


The Visit Report allows Providers to view and print a page-per-day report for a selected Caregiver and Recipient specific to the service delivered. The report will display all service details for individually completed visits, including: Provider (agency name), Caregiver, first-last name), Recipient (first-last name), HCPCS/Mods (scheduled services), Completed Tasks, Actual Start Time (actual date and time visit started), Actual End Time, (actual date and time visit ended), Duration (calculated field), Scheduled Start Time (date and time), Scheduled End Time (date and time), Start Verification Type (technology used to record visit start location), End Verification Type (technology used to record visit end location), 4 DMAS Health Survey Questions, Start Address, End Address, Start Variance (calculated measure-distance away from scheduled location where visit started), End Variance (calculated measure-distance away from scheduled location where visit ended), Start Address Type (type dwelling or structure), End Address Type (type dwelling or structure), Additional Note (visit notes), Signature (copy of Recipient's and Caregiver's signature or reason selected for not collecting signature). Provider must configure and select the following report parameters to filter and display the Visit Reports for specific visits:

- The Start Date and End Date for completed visits.
- Recipient.
- Caregiver.

Reports > Visit Detail Report (Virginia Only)

Export ▼ Zoom in  Zoom out 

Start Date: 2022-07-01 

End Time: 2022-07-27 

Caregiver: Test User ▼

Recipient: Buck Rogers ▼

Apply **Reset**

Run Date: 7/27/2022

Virginia Visit

Provider: UAT Netsmart DEMO

Date Range: 7/1/2022 7/27/2022

Visit ID: 1812137825

Status:	COMPLETED	Actual Start Time:	7/25/22 8:00:00 AM
Caregiver:	Test User	Actual End Time:	7/25/22 10:00:00 AM
Recipient:	Buck Rogers	Duration:	02:00:00
HCPCS Code/Mod(s):	T1019		
Completed Tasks:	Other:Transportation (General)		

Scheduled Start Time:	7/25/22 8:00:00 AM	Scheduled End Time:	7/25/22 10:00:00 AM
Start Verification Type:	PC	End Verification Type:	PC
Start Address:	777 Glades Road , Boca Raton, FL, 33431	End Address:	777 Glades Road , Boca Raton, FL, 33431
Start Variance (Miles):	716.46	End Variance (Miles):	716.46
Start Address Type:		End Address Type:	

Did you observe any change in the individual's physical condition?

Did you observe any change in the individual's emotional condition?

Was there any change in the individual's daily activities?

Calculated Measures:

- Duration: Obtained by subtracting the Actual Start Time from the Actual End Time.
Formula: Actual End Time – Actual Start Time.
- Start Variance: Obtained by measuring the distance of the Actual Start Location from the Scheduled Start Location.
Distance (Miles) of Actual Start location From Scheduled Start Location.



11.3.8. Visit Report

The Visit Report displays scheduling and actual recorded service details for all scheduled visits. Providers can use this report to actively track and review scheduled and reported EVV activity for all scheduled visits, including the current visit status, the time a visit was started or ended, the location where a visit started or ended, etc.

Providers can use the Visit Report to audit service delivery (adherence to treatment plans).

Providers can review the reported Start Verification Method and End Verified Method data to audit the usage of compliant EVV devices for completed visits; this information can be used to identify Caregivers who may require additional training, coaching, or other corrective actions to increase EVV usage for completing scheduled visits.

By default, the Visit Report displays a list of scheduled visits for the current day. The report will display the following data for each scheduled visit: Visit ID, Caregiver, Recipient Name, Service/HCPCS Code, Scheduled Tasks, Completed Tasks, Recipient Address, Visit Start Date, Visit End Date, Actual Start Date, Actual End Date, Start Verified Method, Start Verification Method, End Verified Method, Duration, Billable Start Time, Billable End Time, Status, Start GPS Variance, End GPS Variance.

Providers can customize the default report using the controls on the left to select the following parameters:

- The Start Date and End Date for scheduled visits.
- Recipient(s).
- Caregiver(s).
- Status(es).



Mobile Caregiver+ Reports > Visit Report

Export Zoom in Zoom out

9/26/2023 8:15 AM

Visit Services Report
 User: NET SMART USMO
 Date Range: June 1, 2023 - June 30, 2023

Record Count	Visit ID	Caregiver	Recipient Name	Service/HCPCS Code	Included Tasks	Completed Tasks	Recipient Address	Visit Start Date	Visit End Date	Actual Start Date	Actual End Date	Start Method	End Method	Duration	Billable Start Time	Billable End Time	Status	Start GPS Variance	End GPS Variance
1	145144288	DANIELA SCHNEZ	SHARON HEFT	A0021			145144288 145144288	Jan 14, 2023 8:00 AM	Jan 14, 2023 8:00 AM	Jan 14, 2023 8:00 AM	Jan 14, 2023 8:00 AM	GPS	GPS	00:00:00	Jan 14, 2023 8:00 AM	Jan 14, 2023 8:00 AM	Completed	11.8	11.8
2	145144289	DANIELA SCHNEZ	SHARON HEFT	A0021	Hand with change socks		145144289 145144289	Jan 15, 2023 8:00 AM	Jan 15, 2023 8:00 AM	Jan 15, 2023 8:00 AM	Jan 15, 2023 8:00 AM	GPS	GPS	00:00:00	Jan 15, 2023 8:00 AM	Jan 15, 2023 8:00 AM	Completed	11.4	11.4
3	145144290	MICHAEL RAOH	DAVE TESTA	A0024			145144290 145144290	Jan 15, 2023 8:00 AM	Jan 15, 2023 8:00 AM	Jan 15, 2023 8:00 AM	Jan 15, 2023 8:00 AM	NON	NON	00:00:00	Jan 15, 2023 8:00 AM	Jan 15, 2023 8:00 AM	Completed	11.4	11.4
4	145144291	MICHAEL RAOH	DAVE TESTA	A0024			145144291 145144291	Jan 16, 2023 8:00 AM	Jan 16, 2023 8:00 AM	Jan 16, 2023 8:00 AM	Jan 16, 2023 8:00 AM	NON	NON	00:00:00	Jan 16, 2023 8:00 AM	Jan 16, 2023 8:00 AM	Completed	11.4	11.4
5	145144292	MICHAEL RAOH	DAVE TESTA	A0024			145144292 145144292	Jan 17, 2023 8:00 AM	Jan 17, 2023 8:00 AM	Jan 17, 2023 8:00 AM	Jan 17, 2023 8:00 AM	NON	NON	00:00:00	Jan 17, 2023 8:00 AM	Jan 17, 2023 8:00 AM	Completed	11.4	11.4
6	145144293	DANIELA SCHNEZ	SHARON HEFT	A0021	Hand with change socks		145144293 145144293	Jan 18, 2023 8:00 AM	Jan 18, 2023 8:00 AM	Jan 18, 2023 8:00 AM	Jan 18, 2023 8:00 AM	GPS	GPS	00:00:00	Jan 18, 2023 8:00 AM	Jan 18, 2023 8:00 AM	Completed	11.2	11.2
7	145144294	MICHAEL RAOH	DAVE TESTA	A0024			145144294 145144294	Jan 19, 2023 8:00 AM	Jan 19, 2023 8:00 AM	Jan 19, 2023 8:00 AM	Jan 19, 2023 8:00 AM	GPS	GPS	00:00:00	Jan 19, 2023 8:00 AM	Jan 19, 2023 8:00 AM	Completed	11.4	11.4
8	145144295	DANIELA SCHNEZ	SHARON HEFT	A0021	Hand with change socks		145144295 145144295	Jan 20, 2023 8:00 AM	Jan 20, 2023 8:00 AM	Jan 20, 2023 8:00 AM	Jan 20, 2023 8:00 AM	GPS	GPS	00:00:00	Jan 20, 2023 8:00 AM	Jan 20, 2023 8:00 AM	Completed	11.8	11.8
9	145144296	MICHAEL RAOH	DAVE TESTA	A0024			145144296 145144296	Jan 21, 2023 8:00 AM	Jan 21, 2023 8:00 AM	Jan 21, 2023 8:00 AM	Jan 21, 2023 8:00 AM	GPS	GPS	00:00:00	Jan 21, 2023 8:00 AM	Jan 21, 2023 8:00 AM	Completed	11.8	11.8
10	145144297	MICHAEL RAOH	DAVE TESTA	A0024			145144297 145144297	Jan 22, 2023 8:00 AM	Jan 22, 2023 8:00 AM	Jan 22, 2023 8:00 AM	Jan 22, 2023 8:00 AM	NON	NON	00:00:00	Jan 22, 2023 8:00 AM	Jan 22, 2023 8:00 AM	Completed	11.8	11.8
11	145144298	MICHAEL RAOH	DAVE TESTA	A0024			145144298 145144298	Jan 23, 2023 8:00 AM	Jan 23, 2023 8:00 AM	Jan 23, 2023 8:00 AM	Jan 23, 2023 8:00 AM	GPS	GPS	00:00:00	Jan 23, 2023 8:00 AM	Jan 23, 2023 8:00 AM	Completed	11.8	11.8
12	145144299	MICHAEL RAOH	DAVE TESTA	A0024			145144299 145144299	Jan 24, 2023 8:00 AM	Jan 24, 2023 8:00 AM	Jan 24, 2023 8:00 AM	Jan 24, 2023 8:00 AM	GPS	GPS	00:00:00	Jan 24, 2023 8:00 AM	Jan 24, 2023 8:00 AM	Completed	11.8	11.8

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Calculated Measures:

- Duration: Obtained by subtracting the Billable End Time from the Billable Start Time.
- Formula: Billable End Time – Billable Start Time.
- Start GPS Variance: Obtained by measuring the distance of the Actual Start Location from the Scheduled Start Location.
Distance (Miles) of Actual Start location From Scheduled Start Location.
- End GPS Variance: Obtained by subtracting the distance of the Actual End Location from the Scheduled End Location.
Distance (Miles) of Actual End location From Scheduled End Location.



11.3.9. Visit Service Reconciliation Report

The Visit Service Reconciliation Report allows Providers to view the current transmission statuses, scheduling details, and recorded visit data for completed visits that will be exported to third-party aggregators. This report can be used to view status information for visits that have been submitted to a third-party aggregator.

By default, the Visit Reconciliation Report displays rendered service records for visits completed in the current day by transmission status.

Warning: *The Visit Reconciliation Report is intended for Providers that have Stand Alone subscriptions to the Mobile Caregiver+ Provider Portal, where Providers use the Mobile Caregiver+ Provider Portal to schedule and complete EVV visits to be exported to a third-party aggregator.*

The report will display the following data for each completed visit: Recipient Name, Recipient Medicaid ID, Recipient Payer Member ID, Caregiver, Caregiver CareRecords ID, Payer, Visit ID, Scheduled Visit Start Address, Scheduled Visit Start Time, Scheduled Visit End Time, Billable Service Duration, HCPCS Code, Modifier 1, Modifier 2, Modifier 3, Modifier 4, Completed Tasks, Transmission Status.

Providers can customize the default report using the controls on the left to select the following parameters:

- Payer.
- The Start Date and End Date for completed visits.
- Transmission Status.

Visit Service Reconciliation
DATE: 7/27/2022 10:20:00
Data Range: July 1, 2022 - July 28, 2022

Record Count	Recipient Name	Recipient Medicaid ID	Recipient Payer Member ID	Caregiver	Caregiver CareRecords ID	Payer	Visit ID	Scheduled Visit Start Address	Scheduled Visit Start Time	Scheduled Visit End Time	Actual Service Start Time	Actual Service End Time	Billable Service Start Time	Billable Service End Time	Billable Service Duration	HCPCS Code	Modifier 1	Modifier 2	Modifier 3	Modifier 4	Completed Tasks	Transmission Status
1	PROVIDER PAYER	123456789		JOHN DOE		Private Care of Healthcare Member	123456789	123 Main Street Anytown, NY 12345	07/27/2022 10:00:00	07/27/2022 11:00:00	07/27/2022 10:00:00	07/27/2022 10:55:00	07/27/2022 10:00:00	07/27/2022 10:55:00	55 minutes	91010						FIELD
2	JOHN DOE	123456789		JOHN DOE		Private Care of Healthcare Member	123456789	123 Main Street Anytown, NY 12345	07/27/2022 10:00:00	07/27/2022 11:00:00	07/27/2022 10:00:00	07/27/2022 10:55:00	07/27/2022 10:00:00	07/27/2022 10:55:00	55 minutes	91010						FIELD
3	JANE SMITH	123456789		JANE SMITH		Private Care of Healthcare Member	123456789	123 Main Street Anytown, NY 12345	07/27/2022 10:00:00	07/27/2022 11:00:00	07/27/2022 10:00:00	07/27/2022 10:55:00	07/27/2022 10:00:00	07/27/2022 10:55:00	55 minutes	91010						FIELD



12. Training

[Signing-up for Training](#)

[Accessing Netsmart Mobile Caregiver+ Training Resources](#)

[Viewing Mobile Caregiver+ User Guides](#)

[Viewing Mobile Caregiver+ Video Tutorial](#)

Netsmart provides online Mobile Caregiver+ Training Resources including user guides for Mobile Caregiver+ applications, topic-related video tutorials, full-length recorded webinars, ongoing live webinars, and client support.

Note: Online Mobile Caregiver+ user guides and full-length webinars are available in English or Spanish.

Users can access limited training resources, i.e., sign up to attend training webinars, watch full-length recordings of previous webinars, and/or sign up to attend interactive Questions and Answers workshops, by visiting our Mobile Caregiver+ website, mobilecaregiverplus.com, and clicking on the tile labeled [Training Webinars](#).

In order to access additional training Resources, including user guides for Mobile Caregiver+ applications, topic-related video tutorials, full-length recorded webinars, ongoing live webinars, and client support web page, Users must obtain and use MCG+ login credential log in to the secure website, [Go to Training](#), using the Mobile Caregiver+ User ID and Password.



12.1. Signing up for Training

Once the Provider Agency is registered, it is time to get started! Providers can navigate to the Mobile Caregiver+ Training Resources web page to register for live and recorded training webinars.

1. Open your Internet browser and navigate to the website mobilecaregiverplus.com.
2. Click on the link labeled "**Training Webinars.**"

EVV AGGREGATOR AND STATUS

Select a state/payer for access to registration, client resources, including training webinars, user guides and state-specific information

Color	Description
Green	States that Netsmart is currently doing business with as an aggregator
Blue	States doing business with other aggregators, but Netsmart can provide a connection to the aggregator
Grey	States that are undedicated or have a closed model

TRAINING AND IMPORTANT LINKS

Visit this page for links to all your client resources, including training webinars, user guides, and state-specific information.

Training Webinars

VIEW WEBINARS

Georgia DCH

VIEW PAGE

Kentucky CHFS

VIEW PAGE

Nebraska DHHS

VIEW PAGE

Montana DPHHS

VIEW PAGE

Anthem HealthKeepers Plus Virginia

VIEW PAGE

Pennsylvania Highmark Wholecare

VIEW PAGE

Florida AHCA HH

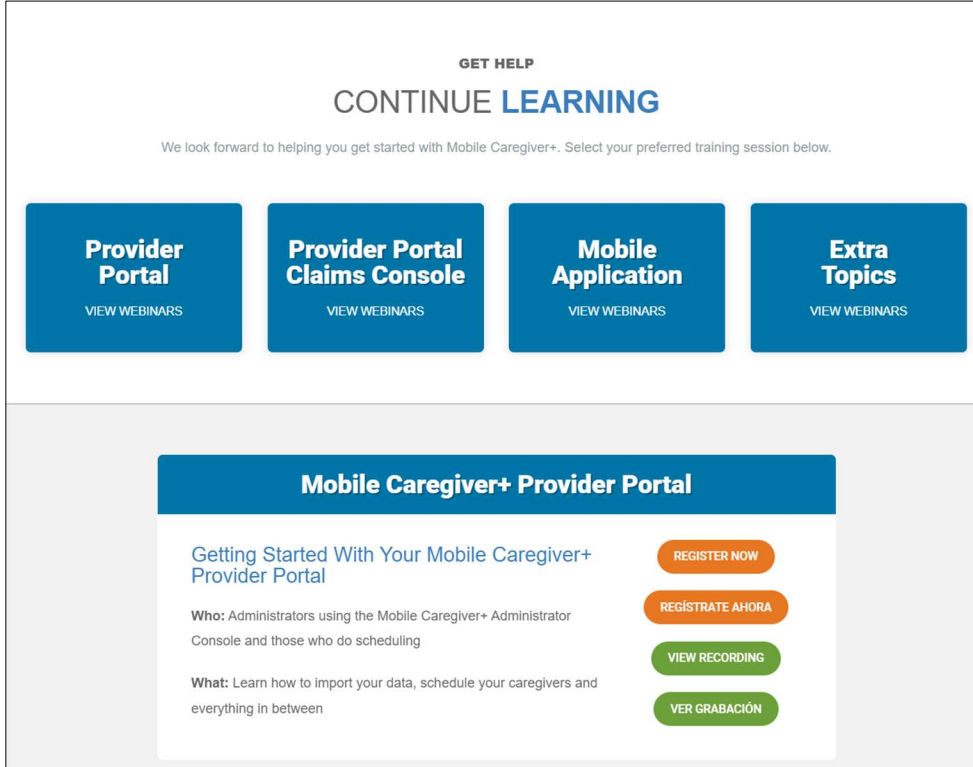
VIEW PAGE

Support

VIEW PAGE



3. Select the Mobile Caregiver+ application for which you want to register for training. You can either scroll down to the section for the application or click on one of the four labeled tiles representing each application.



GET HELP

CONTINUE LEARNING

We look forward to helping you get started with Mobile Caregiver+. Select your preferred training session below.

Provider Portal

VIEW WEBINARS

Provider Portal Claims Console

VIEW WEBINARS

Mobile Application

VIEW WEBINARS

Extra Topics

VIEW WEBINARS

Mobile Caregiver+ Provider Portal

Getting Started With Your Mobile Caregiver+ Provider Portal

Who: Administrators using the Mobile Caregiver+ Administrator Console and those who do scheduling

What: Learn how to import your data, schedule your caregivers and everything in between

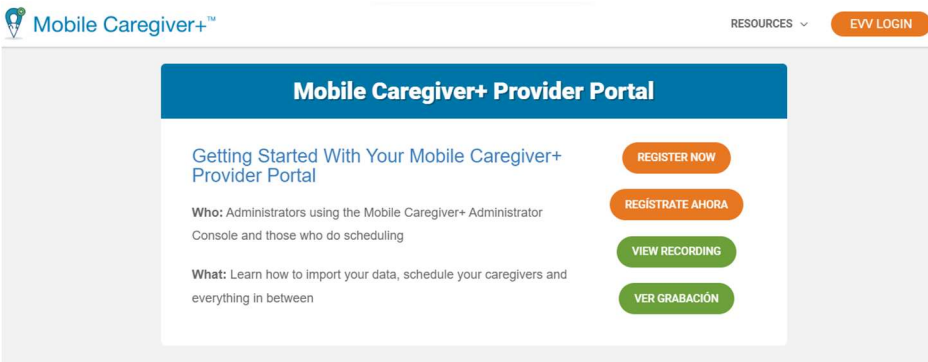
REGISTER NOW


REGISTRATE AHORA

VIEW RECORDING

VER GRABACIÓN

4. To register for a LIVE training session, click on “**Register Now.**”
5. To view a previously recorded training session, click on “**View Recording**” and fill out all of the *required fields on the form and click “**Register.**”
6. To view a previously recorded training session in Spanish click “**Ver Grabacion**” and fill out and fill out all of the *required fields on the form and click “**Register**” and the recorded training session will be prompted.



 Mobile Caregiver+™
RESOURCES ▾
EVV LOGIN

Mobile Caregiver+ Provider Portal

Getting Started With Your Mobile Caregiver+ Provider Portal

Who: Administrators using the Mobile Caregiver+ Administrator Console and those who do scheduling

What: Learn how to import your data, schedule your caregivers and everything in between

REGISTER NOW


REGISTRATE AHORA

VIEW RECORDING

VER GRABACIÓN


7. You can either fill out the registration form for the upcoming webinar or click on the name of the upcoming session to view additional scheduled webinars.

This webinar is offered several times. Select the date and time that works best for you.


Wed, Jan 5, 2022 3:00 PM - 4:30 PM EST 

[Show in My Time Zone](#)

This session is targeted to Agency Employees/Owners, Fiscal Agents and other System Administrators that will be using the Netsmart Administrator Console and Scheduler (Portal).
Attendees will learn how to access and log in to the Administrator Console and Scheduler, navigate the Dashboard, create a Schedule, view real-time Visit Data, add Users, Message users, add Recipients, and how to log out of the Administrator Console.




*Required field

First Name*	Last Name*
<input type="text"/>	<input type="text"/>
Email Address*	Street Address
<input type="text"/>	<input type="text"/>
City	State/Province*
<input type="text"/>	Choose One... 
Phone Number*	Organization*
<input type="text"/>	<input type="text"/>
Job Title*	
<input type="text"/>	


Florida providers Only: Which of the following MCO's are you contracted with: UHC, AETNA, SIMPLY/ANTHEM, IHCS, COMMUNITY CARE PLAN, MAGELLAN. *if you are not in Florida type N/A**

Please indicate whether you are part of an Agency, Independent Provider, or PDS*

Choose One... 

Please list any applicable program(s) your company participates in

By clicking this button, you submit your information to the webinar organizer, who will use it to communicate with you regarding this event and their other services.



8. The Provider User must fill out all of the *Required fields on the LIVE Webinar registration form and click on “**Register**” at the bottom of the page. Once registered, the Provider User will receive an email confirmation.



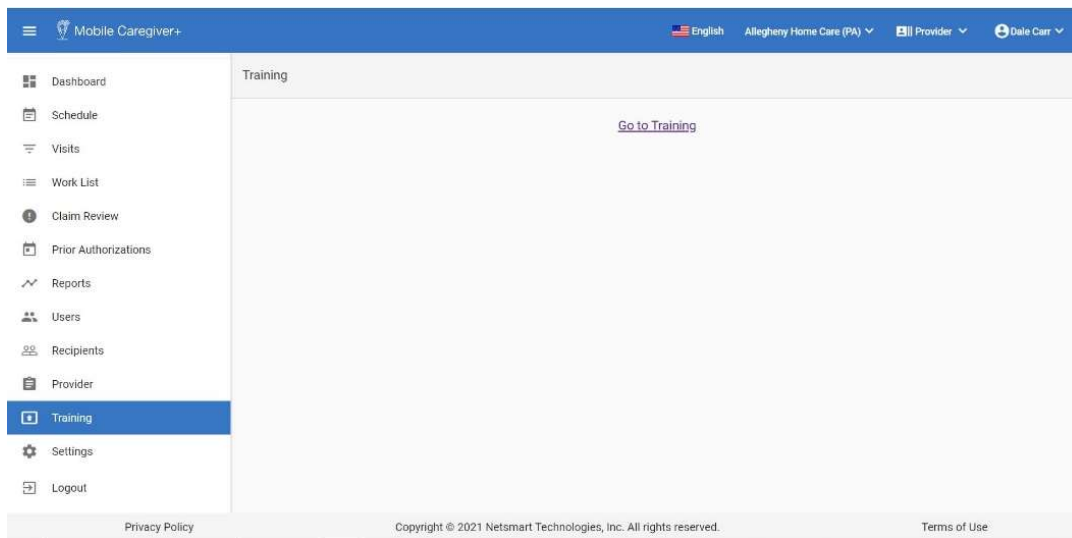
12.2. Accessing Netsmart Mobile Caregiver+ Training Resources

Netsmart provides online Mobile Caregiver+ Training Resources, including user guides for Mobile Caregiver+ applications, topic-related video tutorials, full-length recorded webinars, ongoing live webinars, and client support.

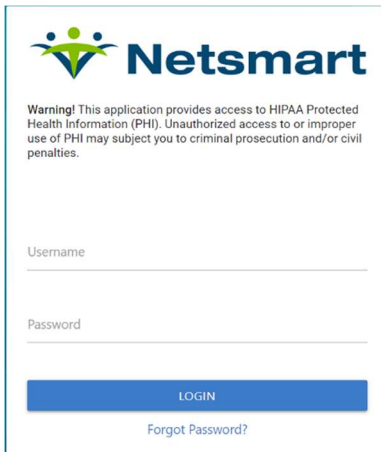
Note: Online Mobile Caregiver+ user guides and full-length webinars are available in English or Spanish.

To access our online Mobile Caregiver+ Training Resources web page:

1. From the Main Menu, click on **Training**.



2. From the Main Window, click on the hyperlink labeled **Go to Training**.
3. From the Netsmart MCG+ login screen, enter your Mobile Caregiver+ User ID and Password.

A screenshot of the Netsmart login screen. At the top is the Netsmart logo, which consists of a stylized green and blue figure above the word 'Netsmart'. Below the logo is a warning message: 'Warning! This application provides access to HIPAA Protected Health Information (PHI). Unauthorized access to or improper use of PHI may subject you to criminal prosecution and/or civil penalties.' Underneath the warning are two input fields: 'Username' and 'Password'. At the bottom of the form is a blue 'LOGIN' button and a link for 'Forgot Password?'.

4. From the Training Resources web page, you can click on one of the following tiles to access the respective training resource:
- **User Guides**, to view the online Mobile Caregiver+ user guides.
 - **Video Tutorials** to view the online Mobile Caregiver+ topic-related video tutorials.
 - **FAQ & Quick Reference Guide** to view the online Mobile Caregiver+ quick reference guides.
 - **Training Webinars** to sign up for live training webinars or to watch full-length recorded webinars.

TRAINING RESOURCES

GETTING STARTED

LEARN HOW TO USE MOBILE CAREGIVER+

We Look Forward To Helping You Get Started With Mobile Caregiver+.

Our comprehensive, cloud-based solutions work to simplify, streamline and quickly and easily verify care delivery tasks and process claim data right at the point of care. That means agencies, caregivers and patients can focus their time and attention on what matters most — improved care delivery with better outcomes, greater efficiency and cost reduction.



EVV TRAINING

TOOLS FOR YOUR SUCCESS

User Guides

VIEW

Video Tutorials

VIEW

Updates And Enhancements

COMING SOON

Training Webinars

VIEW

FAQ & Quick Reference Guide

VIEW

Support Desk

VIEW

OPEN SUPPORT TICKET

12.2.1. Viewing Mobile Caregiver+ User Guides

- From the Training Resources web page, click User Guides tile to view the online Mobile Caregiver+ user guides.



- From the User Guides list, click on the guide you want to view.



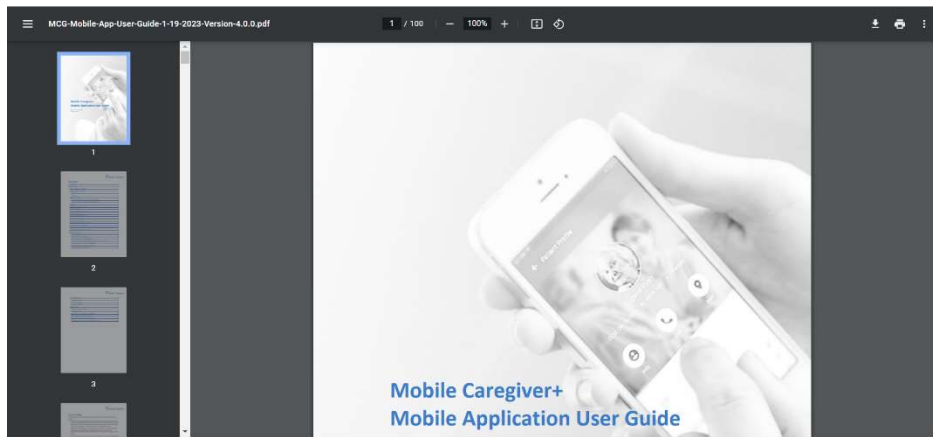


EVV SUPPORT
RESOURCE **DOWNLOAD**

These User Guides provide step-by-step instructions on how to set up and use Mobile Caregiver+. Remember, we're always here to help. So, if you still have questions after reviewing this material, just give us a call or email evvsupport@ntst.com.

<p>Provider Admin Portal DOWNLOAD PDF</p>	<p>Claims Console DOWNLOAD PDF</p>	<p>Mobile Application DOWNLOAD PDF</p>
<p>Portal De Un Proveedor DOWNLOAD PDF</p>	<p>Consola De Reclamos DOWNLOAD PDF</p>	<p>La Aplicación De Mobile Caregiver+ DOWNLOAD PDF</p>

Note: The system will display a downloadable PDF version of the selected user guide in your web browser.



12.2.2. Viewing Mobile Caregiver+ Video Tutorials

- i. From the Training Resources web page, click on the link labeled **Video Tutorial** to register for and watched short DIY videos.



- ii. From the list, select the video training resource that you want to view.

[GET HELP](#)

CONTINUE **LEARNING**

We look forward to helping you get started with Mobile Caregiver+. Select your preferred training session below.

Admin Console

[VIEW VIDEOS](#)

Claims Console

[VIEW VIDEOS](#)

Mobile Application

[VIEW VIDEOS](#)

Special Topics

[VIEW VIDEOS](#)

Updates And Enhancements

[VIEW VIDEOS](#)

Provider Portal

<p>Layout And Navigation</p> <p>Demonstrates basic layout and navigation for the Mobile Caregiver+ Provider Portal.</p>	<p>WATCH VIDEO</p> <p>14m 48 seconds</p>
<p>Manually Adding New Users</p> <p>Demonstrates how to manually add a new user to the Mobile Caregiver+ system.</p>	<p>WATCH VIDEO</p> <p>6m 20 seconds</p>
<p>Set Up: Add Recipients</p> <p>Demonstrates how to manually upload, edit, and interact with a recipient in the Mobile Caregiver+ system.</p>	<p>WATCH VIDEO</p> <p>7m 30 seconds</p>
<p>Set Up: Add Tasks</p> <p>Demonstrates how to manage/add tasks, also known as ADL's activities of daily living, or plan of care, for billable services codes.</p>	<p>WATCH VIDEO</p> <p>7m 56 seconds</p>
<p>Scheduling Recurring Visits</p>	



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