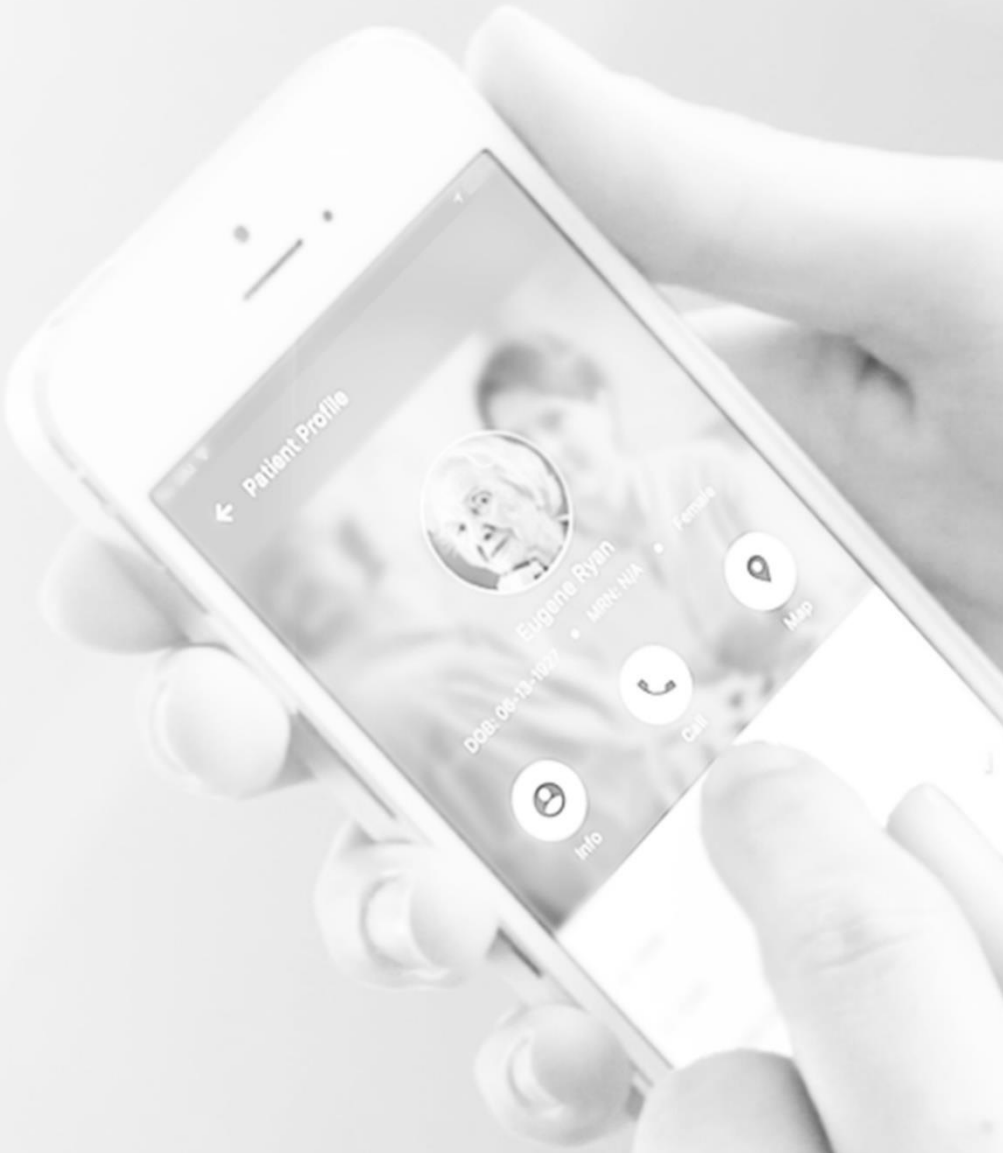

Mobile Caregiver+ Admin User Guide

Date: March 29, 2021

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Getting Started

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General Requirements

You are here: *Mobile Caregiver+ Administrator User Guide* > *Getting Started* > General Requirements

Each provider must designate at least one Mobile Caregiver+ System Administrator during the registration process. Depending on the Payer and Program, System administrators may be responsible for one or more of the following:

- Creating and managing Mobile Caregiver+ User accounts.
- Creating and managing Mobile Caregiver+ Recipient accounts.
- Managing Tasks for billable services.
- Scheduling, monitoring, and managing visits
- Running reports.

All Users must have registered Mobile Caregiver+ User accounts in order to login to the Mobile Caregiver+ Administrator Console.

The Administrator Console and the Netsmart Mobile Care+ app are compatible with the following:

EVV Hardware and Software Requirements	
Supported PC Operating Systems	• Windows OS (32 or 64 bit) Version 7 or higher • Mac OS Version X (10) or higher
Supported Mobile Operating Systems	• iOS Version 9 or higher • Android Version Lollipop (5.0) or higher
Supported PC & Mac Browsers	• Microsoft Edge Version 16 or higher • Google Chrome Version 4 or higher • Apple Safari Version 10 (Mac)/4 (Windows) or higher • Mozilla Firefox Version 57 or higher
Supported Mobile Browsers:	• Google Chrome Version 4 or higher on Android • Apple Safari Version 10 (Mac)/4 (Windows) or higher

EVV Hardware and Software Requirements	
Mobile Device Requirements	• 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

If the Mobile Care+ app is to operate on an MDM-managed solution, then the MDM solution must be configured to allow the following app access. If Optional, then EVV will still be possible. If required, then EVV will not work effectively without the privilege.

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 WiFi network)	For internet access.
WiFi Data	Required (unless user accesses internet only mobile network)	For internet access.

Access	Required/Optional	Reason
File Storage	Required	For local encrypted storage of working data.

Related Topics

- *Logging In*
- *Administrator Console Overview*
- *Viewing the Main Menu*
- *Changing Refresh Settings*
- *Commonly Used Icons and Controls*
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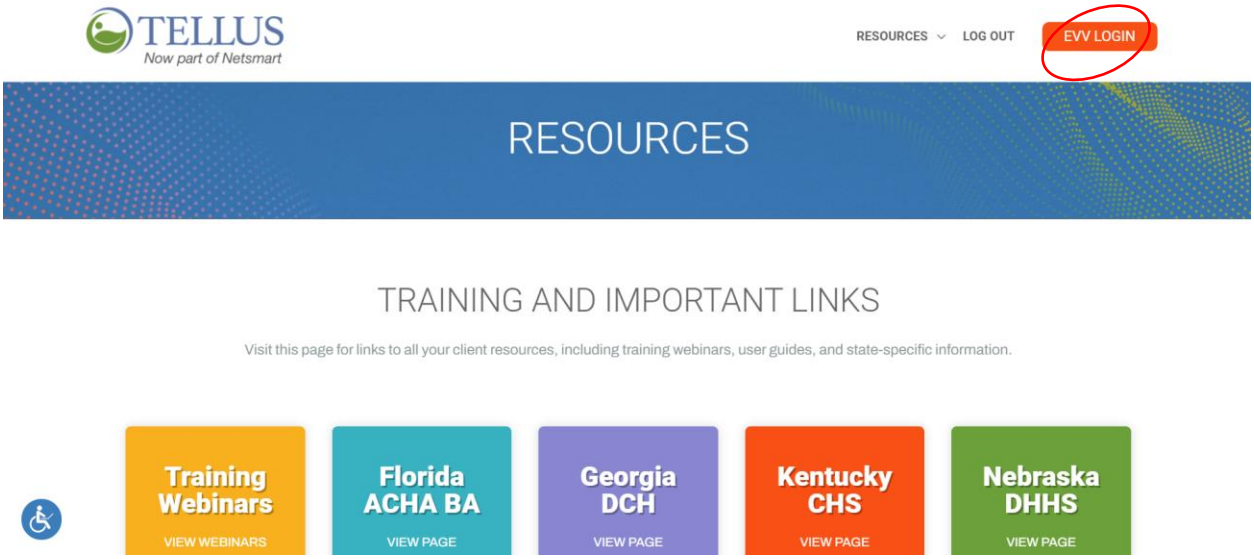
Logging In

You are here: *Mobile Caregiver+ Administrator User Guide* > *Getting Started* > Logging In

The Mobile Caregiver+ Administrator Console is a web-based application.

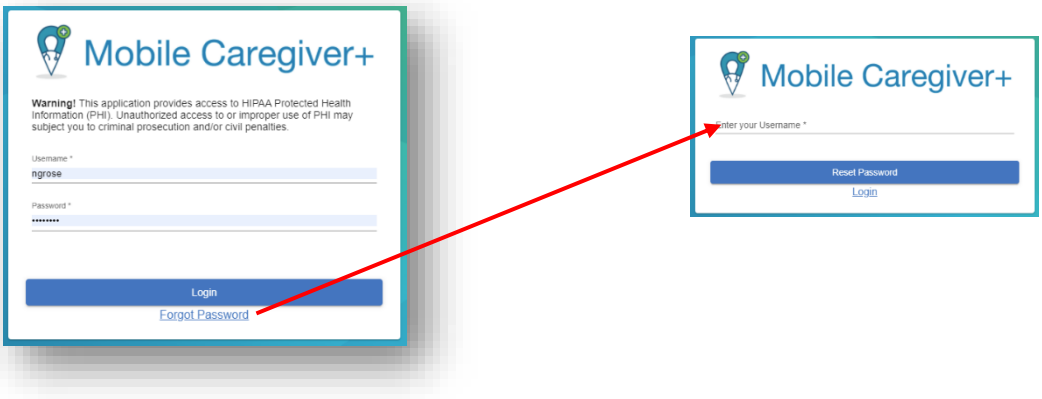
Open your web browser, best practice recommendation is that Providers use Google Chrome.

Type https://4tellus.com/resources in the address bar of your browser and press the Enter key.



Click the EVV LOGIN link located in the upper right-hand corner of the screen.

The Mobile Caregiver+ Login dialogue box opens.



Enter your Mobile Caregiver+ **Username** and **Password**.

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

Click ***Login***.

The Mobile Caregiver+ Console opens to the Dashboard view.

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

If you are new to Netsmart and have been assigned the role of ***Caregiver****, you will receive an email providing instructions on how to access the Mobile Care+ app. You will have 36 hours to activate your account; after that time, the invitation expires.*
In either case, if you do not find the email in your inbox, check your junk and spam folders for the email from the Mobile Caregiver+ System.

Related Topics

- *General Requirements*
- *Administrator Console Overview*
- *Viewing the Main Menu*
- *Changing Refresh Settings*
- *Commonly Used Icons and Controls*
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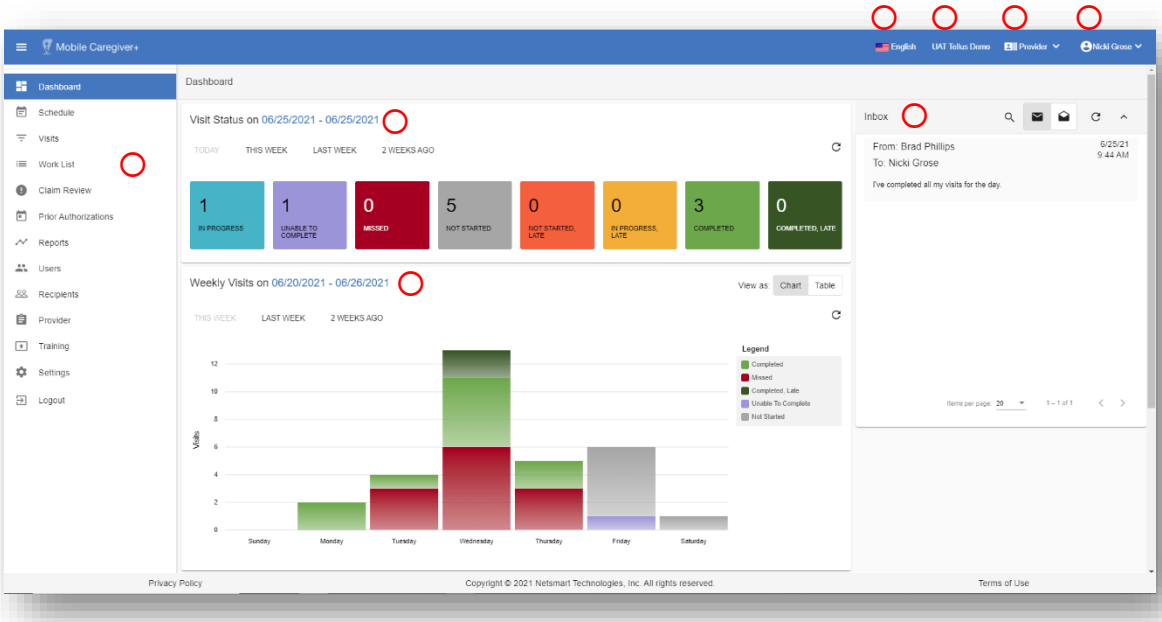
Administrator Console Overview: Viewing the Dashboard

You are here: *Mobile Caregiver+ Administrator User Guide* > *Getting Started* > Administrator Console Overview

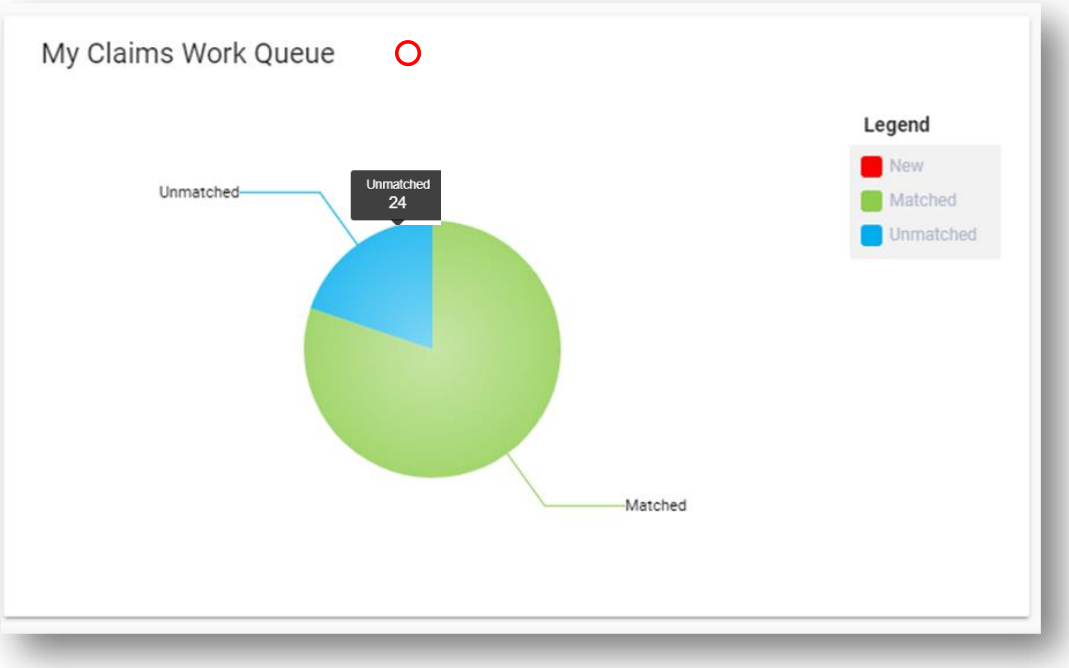
The Mobile Caregiver+ Administrator Console displays a snapshot overview of near real-time and/or real-time EVV analytic data in Dashboard; for more information about the data displayed in the Dashboard, please refer the numbered items described in the table below the screen shots.

More detailed information on how to use each section of the Dashboard is in *Using the Dashboard*.

The following Screen shots depict sections of the Dashboard and are shown in the order they appear in, from top to bottom:

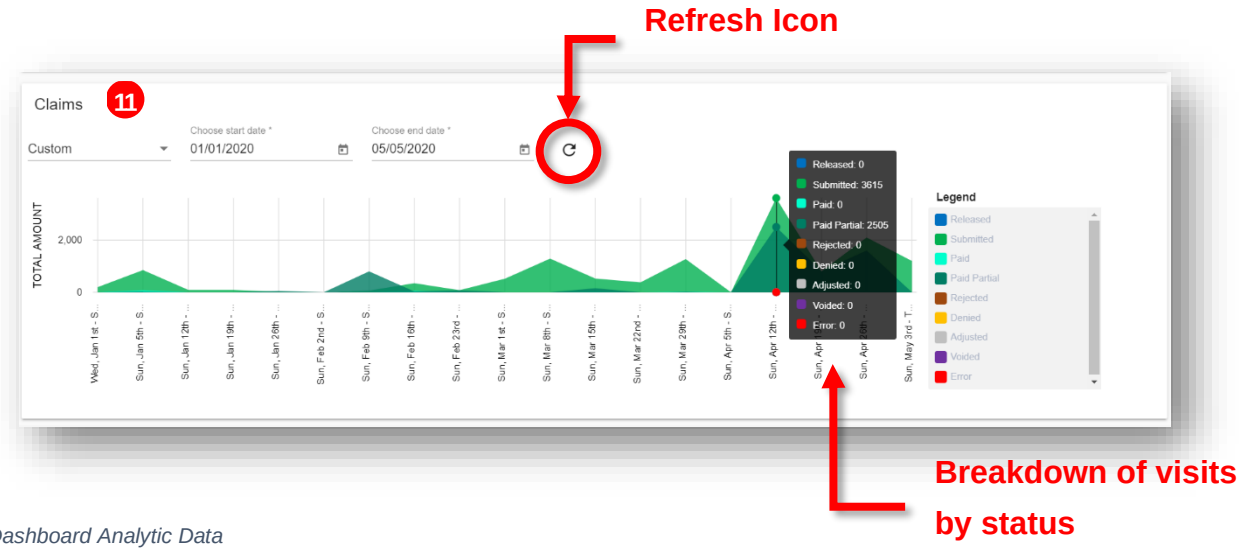


Dashboard Analytic Data



Dashboard Analytic Data

Dashboard Analytic Data



Dashboard Analytic Data

Dashboard Item	Description
☐	**Main Menu button:** 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.
☐	**Language icon**: Allows Users to select the display language for the Admin Console.
☐	**Agency name:** Displays the name of the active agency/location. Users can click on the current active agency to switch locations.
☐	**User Role:** Displays the assigned User-role of the active User; the system will display Caregiver if a Caregiver logs into the Admin Console.
☐	**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 to **Log Out** of the Admin Console.
☐	**Visit Status:** A report which 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 contains hyperlinks which provides direct access to the corresponding visits in the **Visits List**. Users can choose between a chart or table display.
☐	**Weekly Visits*:*** A report which displays daily EVV visit information for one of three weekly time ranges, **This Week**, **Last Week,** or **2**

Dashboard Item	Description
	Weeks Ago; the colored stack chart contains hyperlinks, which provides direct access to the corresponding visits in the **Visits** List. Users can choose between a chart or table display.
☐	**Inbox**: The *Inbox* displays HIPPA 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.
☐	**My Claims Work Queue**: A report which displays analytic data for completed visit by statuses, New, Matched, and Unmatched; the chart contains hyperlinks which provides direct access to the Work List. Users can choose between a chart or table display.
☐	**Released Claims Pending Submission:** A report which displays the total estimated payment amount for all Unsubmitted billable service records that have been released to Claims Reviews; the display contains a hyperlink which provides direct access to Claims Review.
11	**Claims**: 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. Report contains a hyperlink which provides direct access to Claims Review.

Related Topics

- *General Requirements*
- *Logging In*

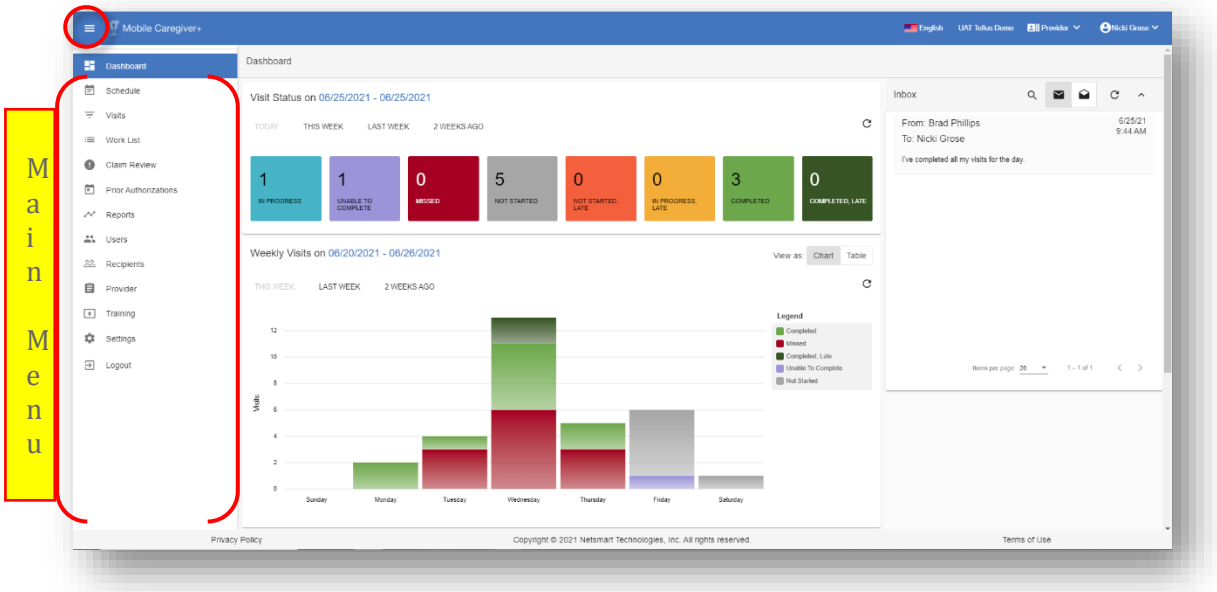
- Viewing the Main Menu
- Changing Refresh Settings
- Commonly Used Icons and Controls
- Logging Out
- Terminology
- Acronyms

Viewing the Main Menu

You are here: Mobile Caregiver+ Administrator User Guide > Getting Started > Viewing the Main Menu

The **Main Menu** provides access to all the features and functions of the Mobile Caregiver+ Administrator Console.

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



*Note: The **Claim Review**, **Work List**, and **Prior Authorizations** menu options are used for claim processing and are discussed in the Mobile Caregiver+ Claims User Guide, which is available from the Training menu option.*

Menu Item	Description
Dashboard	Displays real-time and near-real-time overview of EVV data analytics for scheduled visits.
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 EVV portal. The Schedule menu option allows providers to view existing schedule, check for availability and add new visits.
Visits	Displays a list chart, which depicts all scheduled visits in a Provider's Mobile Caregiver+ Portal. Providers can use the fields in the header to filter the list and to add new visits to the EVV portal. The Visits menu option allows providers to effectively search for and manage scheduled visits, such as, manually completing missed visits, rescheduling visits, cancelling visits, etc.
Work List	Displays a list chart, which depicts records for billable services that have been rendered. Providers will use the Work List to locate, review, process, remediate, and release billable services for claims submission.
Claim Review	Displays a list chart, which depicts status and remittance data for all billable service records that have been released from the Work List. Providers will use the Claims Review menu option to obtain status and remittance data for released service records. as well as

Menu Item	Description
	to adjust. to void. and to add Third Party Liability, EOB entries for Paid and Partially Paid claims.
Prior Authorizations	Displays a list chart, which depicts all Prior Authorizations which have been added to a Provider's Mobile Caregiver+ Portal. Providers can use the Prior Authorization menu function to locate, and to review Prior Authorizations in their Provider EVV Portals. Depending on the Payer and Program, some Providers may be able to add new Prior Authorizations to, and/or edit existing Prior Authorizations in their Provider Portals..
Reports	Displays a list of Provider Reports that are 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+ Portal. Depending on the Payer and Program. Providers may have full, or limited capability to manage User settings/properties in their Provider Portal.
Recipients	Allows Providers to locate, add, edit, and manage Recipients in their Mobile Caregiver+ Portal. Depending on the Payer and Program. Providers may have full, or limited capability to manage Recipient setting/properties in their Provider Portals.
Providers	Allows Providers to review, and to make permissible changes to the configuration settings for their agencies. Depending on the Payers and Programs. Providers may be able to do one or more of the following: Edit their agencies' Profiles demographic data.

Menu Item	Description
	Manage tasks. Edit Contractors' data. Update override rates for billable services.
Settings	Allows Providers to configure the auto refresh timer for the Dashboard, Users, and Schedule screens. Providers can enter the amount of time the system will wait before refreshing, updating data in the Dashboard, Users, and Schedule screens.
Training	Provides access to the Mobile Caregiver+ Training Resources web page. Providers can access online User Guides, Training Videos, sign up for live EVV training Webinars, as well as open online help desk support tickets.
Logout	allows Providers to exit the Mobile Caregiver+ Administrator Console.

Related Topics

- *General Requirements*
- *Logging In*
- *Administrator Console Overview*
- *Changing Refresh Settings*
- *Commonly Used Icons and Controls*
- *Logging Out*
- *Terminology*
- *Acronyms*

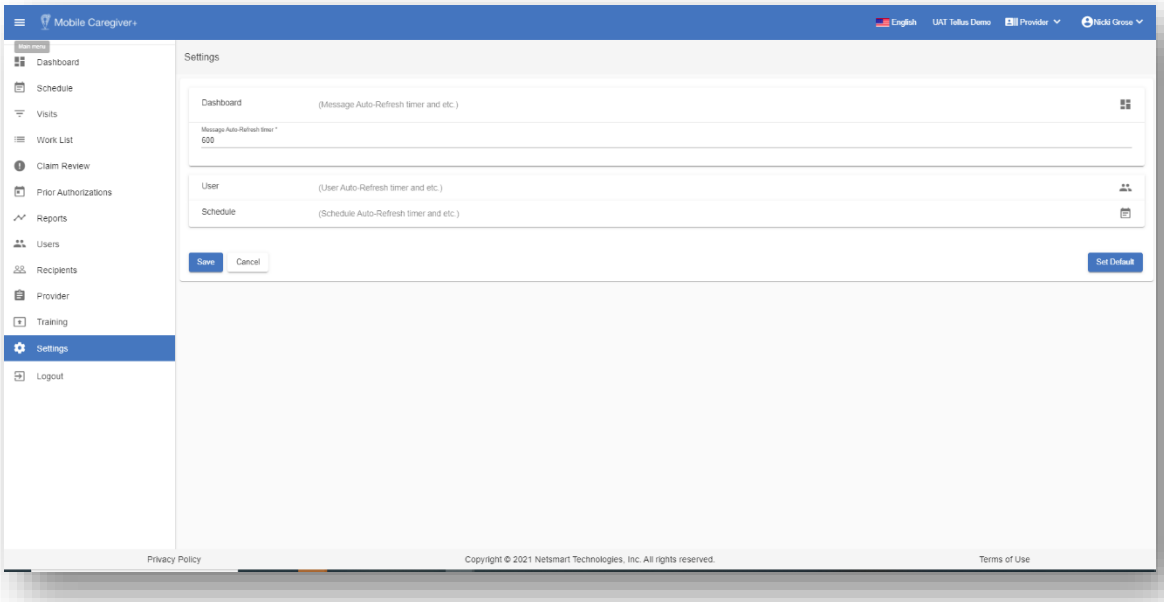
Configuring Auto-Refresh Timers

You are here: *Mobile Caregiver+ Administrator User Guide* > *Getting Started* > Configuring Auto-Refresh Timers

The **Settings** option Allows Providers to configure the auto refresh timers for the **Dashboard**, **Users**, and **Schedule** screens. Provider can enter the time, in seconds, that will wait to update EVV data on the respective screens. To do so:

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click **Settings**.



Click the name of the screen, **Dashboard**, **User**, or **Schedule,** to set the Auto-Refresh timer.

Enter Auto-Refresh rate (the time value will be in Seconds) – The refresh rate time must be set to a minimum of 300 seconds.

Note: Users can click the blue ***Set Default*** command to set the refresh rate to 600 Seconds (10 Minutes) for all 3 screens.

Click ***Save***.

Related Topics

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

Commonly Used Icons and Controls

You are here: Mobile Caregiver+ Administrator User Guide > Getting Started > Commonly Used Icons and Controls

Conventional Icons Used this Document.

Icon	Description
	Main Menu: Click the Main Menu icon – sometimes called the "hamburger icon" – to expand the menu to see the full list of options; click it again to collapse the menu so that only icons display.
	View Only: Indicates that an object is read-only, Users cannot, or has limited capability to modify object's properties/settings.
	Edit: Indicates an object is editable, Users can modify object's properties/settings.
	Actions: Click the Actions icon to view a list of available submenu options (shortcuts).
	Search: Allows Users to perform Keyword searches. Click on the Search icon to open a search field.
	Reload: Refreshes the active screen/sub-screen with the most current EVV data. Some screens have multiple Reload icons, which are used to refresh individual subsections. Refresh times for the Dashboard, Users, and Schedule can be set using the Settings option.

Conventional Icons Used this Document.

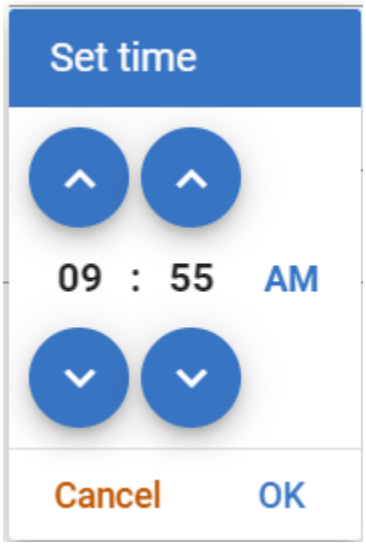
Icon	Description
	Clock: Allows Users to enter and/or edit values in time data fields. Click the Clock icon to enter/edit field values. See *Selecting Times using the Clock Icon* for detailed instructions on setting time using this icon.
	Calendar View: Displays a list chart calendar, which depicts all scheduled visits in a Provider's Mobile Caregiver+ Portal. Providers can customize the calendar, review scheduled visits, and add new visits to the EVV portal. See *Selecting Dates using the Calendar Icon* for detailed instructions on setting time using this icon.
	Schedule View: Displays a bar chart calendar, which depicts all scheduled visits in a Provider's Mobile Caregiver+ Portal – Each scheduled visit is represented by a colored bar. Providers can customize the calendar, review scheduled visits, and add new visits to the EVV portal. Click the Schedule
	Today: Click the Today icon to display scheduled EVV visit data for the current day.
	Day: Configures the Schedule calendar to display a daily calendar planner, which will depict schedule visits for one day. Use the arrows at the top of the screen to move forward and backward between days.
	Week: Configures the Schedule calendar to display a weekly calendar planner, which will depict schedule visits for one week. Use the arrows at the top of the screen to move forward and backward between weeks.
	Month: Configures the Schedule calendar to display a monthly calendar planner, which will depict schedule visits for one Month. Use the arrows at the top of the screen to move forward and backward between months.

Configuring Time entries using the Clock Icon

You are here: *Mobile Caregiver+ Administrator User Guide* > *Getting Started* > Configuring Time entries using the Clock Icon

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

1. Click the clock icon, to open the **Set time** dialogue box.



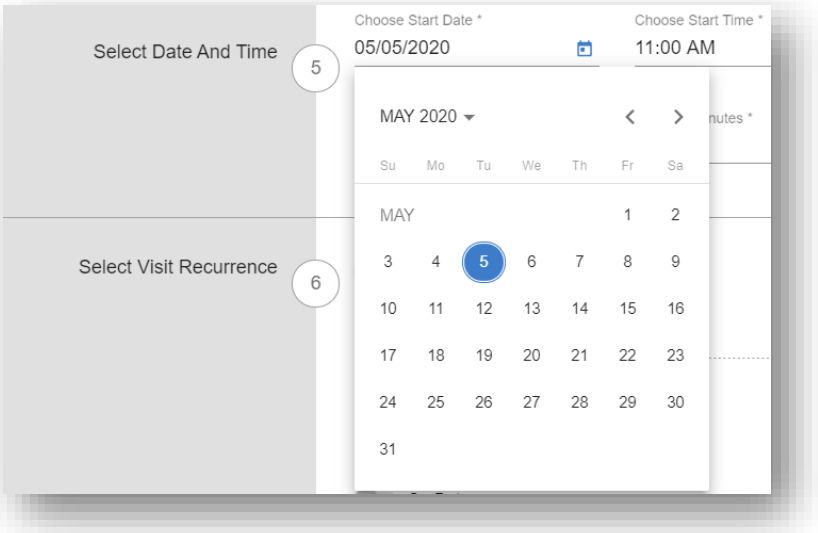
2. Use the up and down arrows to enter/set the time .
3. Click **AM** or **PM** to toggle between morning and afternoon.
4. Click ***OK*** to complete the entry and close the Set time dialogue box.

Configuring Date entries using the Calendar Icon

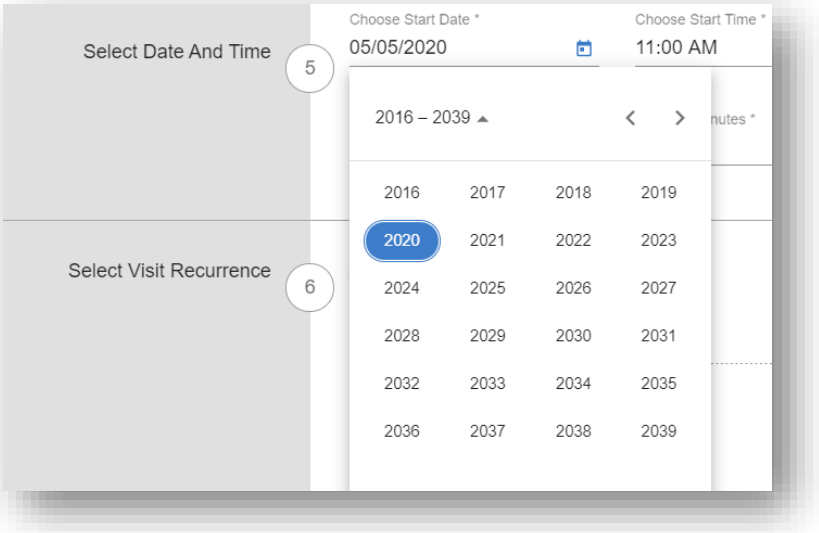
You are here: *Mobile Caregiver+ Administrator User Guide* > *Getting Started* > Configuring Date entries using he Calendar Icon

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 dialogue box; it defaults to the current year, month, and day.

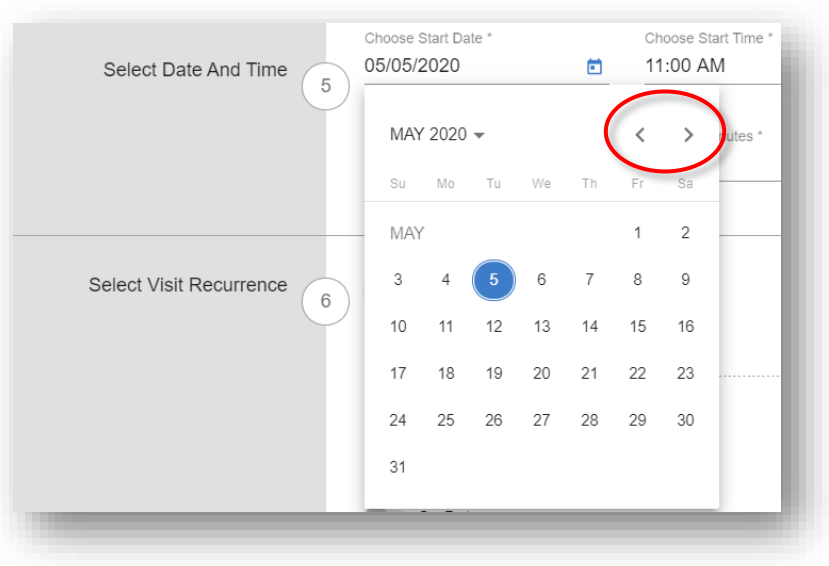


2. To change the year, click the current month and year being a list of years.



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

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



5. Click ***OK*** complete the entry and close the edit Calendar dialogue box.

Related Topics

- *General Requirements*
- *Logging In*
- *Administrator Console Overview*
- *Viewing the Main Menu*
- *Changing Refresh Settings*
- *Logging Out*
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- *Acronyms*

Logging Out

You are here: *Mobile Caregiver+ Administrator User Guide* > *Getting Started* > Logging Out

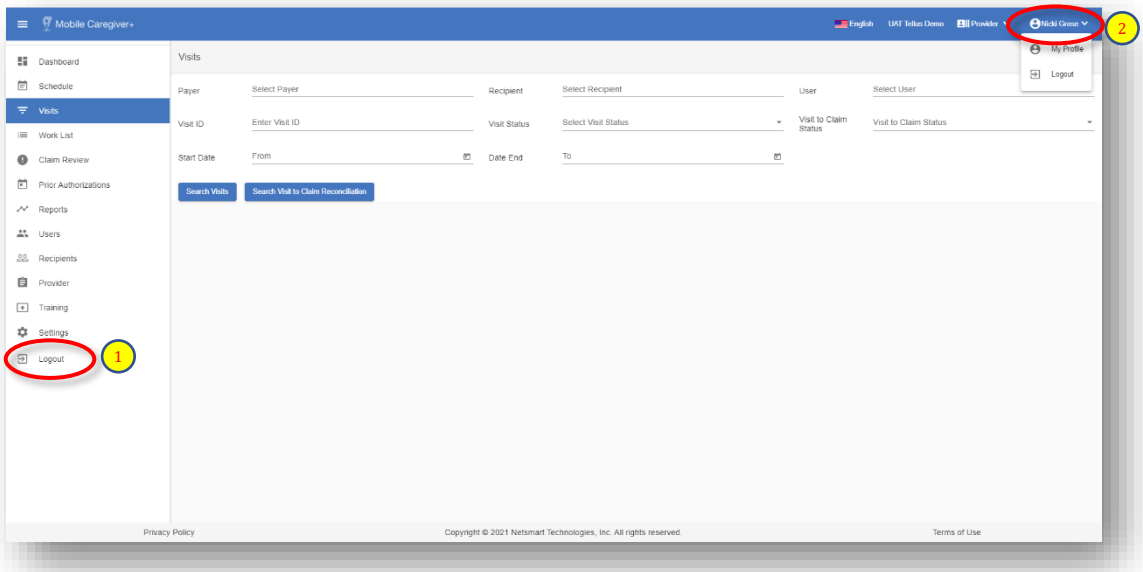
If you are not actively using the system, it is a best practice to log out. Logging out helps to ensure the security and protection of your organization's information, as well as the information for your Recipients and Caregivers. The system will automatically logout the active User after 30 minutes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

There are two ways to logout. Either way will log the active User out of the Mobile Caregiver+ Administrator Console and returned to the login page.

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information), then, click ***Logout***.

Or

From the Navigation bar, click on your name, then click ***Logout.***



Related Topics

- *General Requirements*
- *Logging In*
- *Administrator Console Overview*
- *Viewing the Main Menu*
- *Changing Refresh Settings*
- *Commonly Used Icons and Controls*
- *Acronyms*

Terminology

You are here: *Mobile Caregiver+ Administrator User Guide* > *Getting Started* > Terminology

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

- **Administrator (Admin):** A Mobile Caregiver+ User Role that grant a User full access to all available features and functions of the Mobile Caregiver+ Portal. The Fiscal Agent and Fiscal Intermediary roles also grant Users the same access privileges as an Administrator. Users that are assigned the role of Administrator, Fiscal Agent, or Fiscal Intermediary will have access to data for all recipients in the provider agency. Depending on the Payer and Program, Administrators may have rights to Manage some, or all, object in an agency's EVV portal.

  Note: Multiple User roles can be assigned to a single User account. For example, if a User works in the Office as an Administrator and assist in providing coverage for Caregivers, the User will have to be assigned both the Administrator Role and the Caregiver Role.
- **Biller:** A Mobile Caregiver+ User role that grants a User limited access to the claims processing features and functions of the Mobile Caregiver+ Portal. The Biller Role can be assigned to contractors to allow them to effectively process claims, while limiting access to PHI and other confidential data.
- **Provider Viewer:** A Mobile Caregiver+ User Role that grants a User limited access to scheduling and Recipient data in the Mobile Caregiver+ Portal; Provider Viewers can view, but are not allowed to edit, scheduled visit data and Recipient data. Users that are assigned the role of Provider Viewers will have access to view data for all Recipients in the provider agency.
- **Caregiver:** A limited Mobile Caregiver+ User Role that allow Users to download, install, and login to the Mobile Care+ app to complete scheduled visit.
- **Healthcare Common Procedure Coding System (HCPCS codes):** A standardized healthcare coding system that is used primarily to identify services provided also known as: Service Description, Billing Codes, Procedure Codes, Revenue Codes. (See also Service Codes). The HCPCS code, also known as the Service, or Procedure code can be made up of a combination of letter and numbers.

- **Service Code:** A code, which can be a combination of letters and numbers, that represents a healthcare service (see also HCPCS codes). Payer assign Service Codes to represent billable healthcare services.
- **Modifier:** (Supplement to the *HCPCS Codes*/*Service Codes*) A two digit code used to supplement or adjust care description concerning a service or procedure provided by a Caregiver. Modifier can be used by Payers to authorize non-standard services, such as, Telehealth visits or group therapy; not all service codes have modifiers.
- **Agency:** A business which employs one or individuals to render care also known as*:* Traditional Home Health Agency, Fiscal Management Agency (FMA), or Fiscal Intermediary.
- **Payer:** Payer refers to the health plan or organization that remits payments to Caregivers/Provider and/or Agencies for the services that are rendered to insured Recipients.
- **Prior Authorization/Service Authorization:** A decision/approval by a health insurer or plan that a health care service is necessary. Health plans authorize care for a Recipient for a specified period, for specified units (billable time increment for a service), or for a specified number of visits.
- **Recipient:** An individual receiving services/care is also known as: Client, Participant, Individual, Family Member (child, parent, spouse, etc.) PDS Employer, Beneficiary, Member, etc.
- **Schedule:** A plan for rendering services, which includes pre-planned visits. Visit 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 planed schedule for rendering one or more service(es), which includes planned dates, times, and place for a Caregiver to provide services to a Recipient.

Related Topics

- *General Requirements*
- *Logging In*
- *Administrator Console Overview*
- *Viewing the Main Menu*
- *Changing Refresh Settings*
- *Commonly Used Icons and Controls*
- *Logging Out*
- *Acronyms*

Acronyms

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

Related Topics

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

Using the Dashboard

You are here: *Mobile Caregiver+ Administrator User Guide* > Using the Dashboard

Click a topic below:

Accessing the Dashboard

Viewing *the* Visit Status R*eport*

Viewing the Weekly Visits Report

Viewing the Inbox

Viewing The My Claims Work Queue Report

Viewing the Released Claims Pending Submission Report

Viewing the Claims Report

Accessing the Dashboard

You are here: *Mobile Caregiver+ Administrator User Guide* > *Monitoring Caregivers and Visits* > Administrator Dashboard: Accessing Visit Status Detail

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

To access the Dashboard:

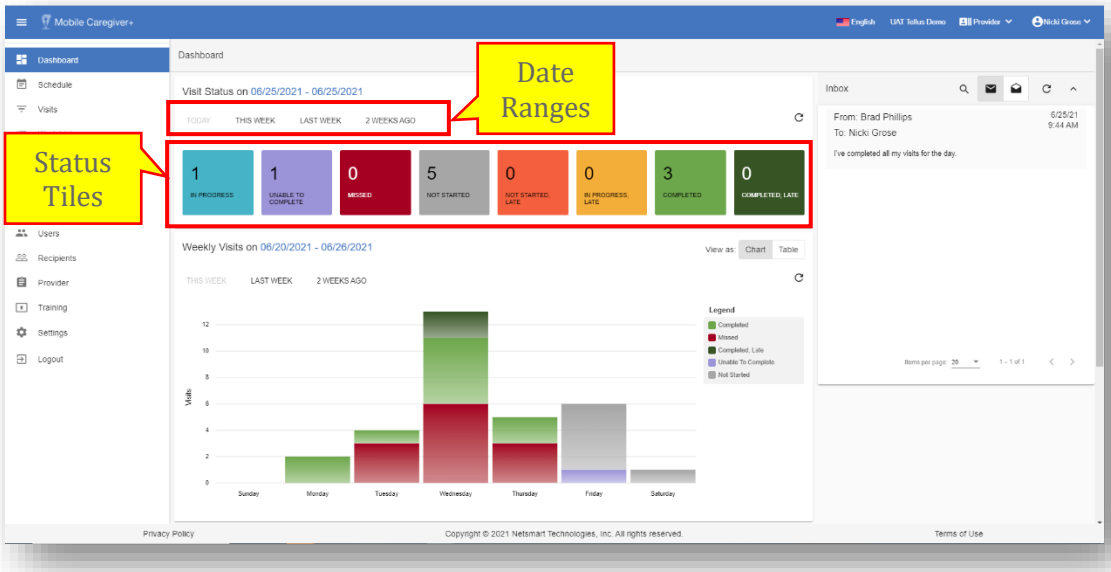
1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Dashboard** option.

Reviewing the Visit Status Report

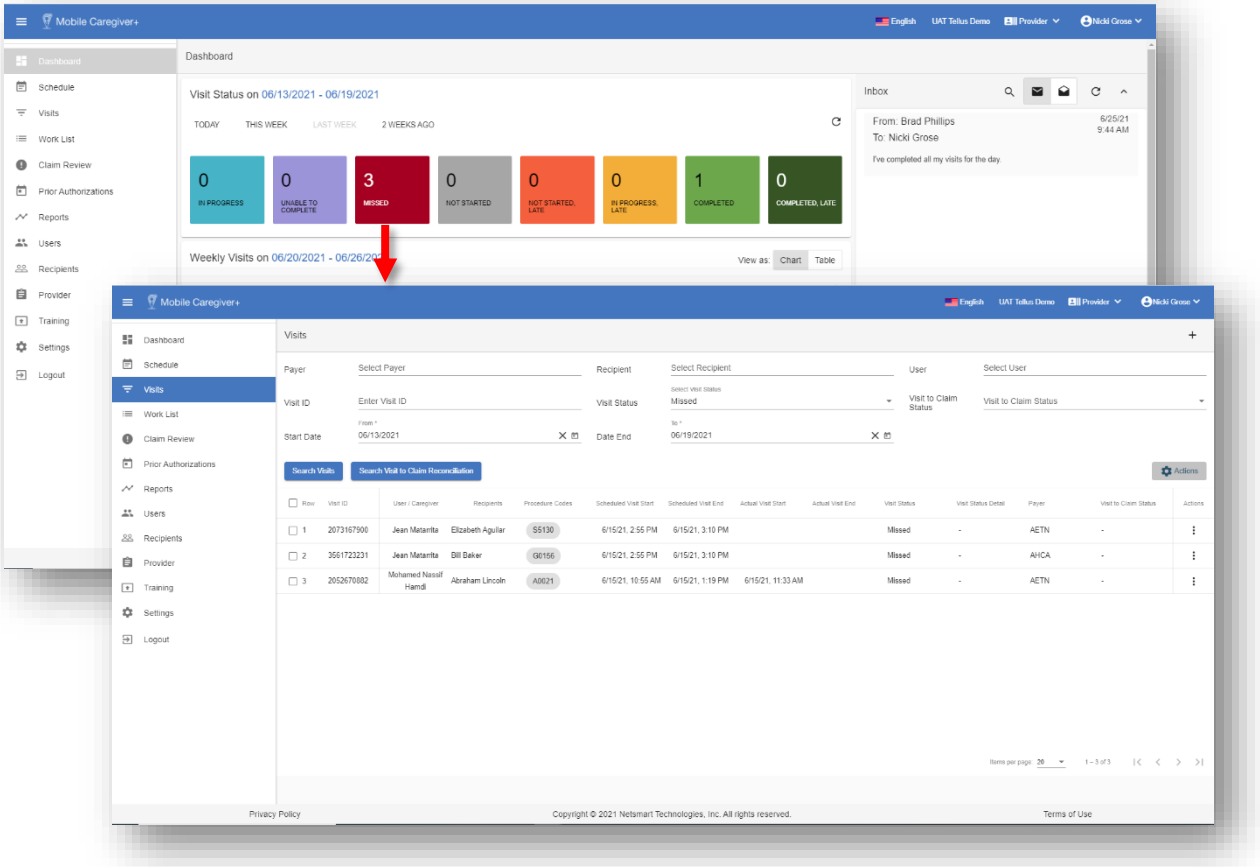
The Visit Status Report displays near real-time to real-time overview analytic status data for scheduled visits. There are 8 colored tiles that display summary data for each type of visit status. Providers can select one of four date ranges, ***TODAY***, ***THIS WEEK, LAST WEEK,*** or ***2 WEEKS AGO,*** to view summary status data for all visits scheduled for the selected period. The example below shows visit statuses for visit scheduled for **Today**.

Visit Status Report



The “reload” icon, ↻, allows Users to refresh the Visit Status chart with current real-time data.

Users can click on any of the 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.



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

Related topics:

- *Accessing Weekly Visits Detail*
- *Viewing Inbox Alerts*
- *Viewing Claims Information*

Reviewing the Weekly Visits Report

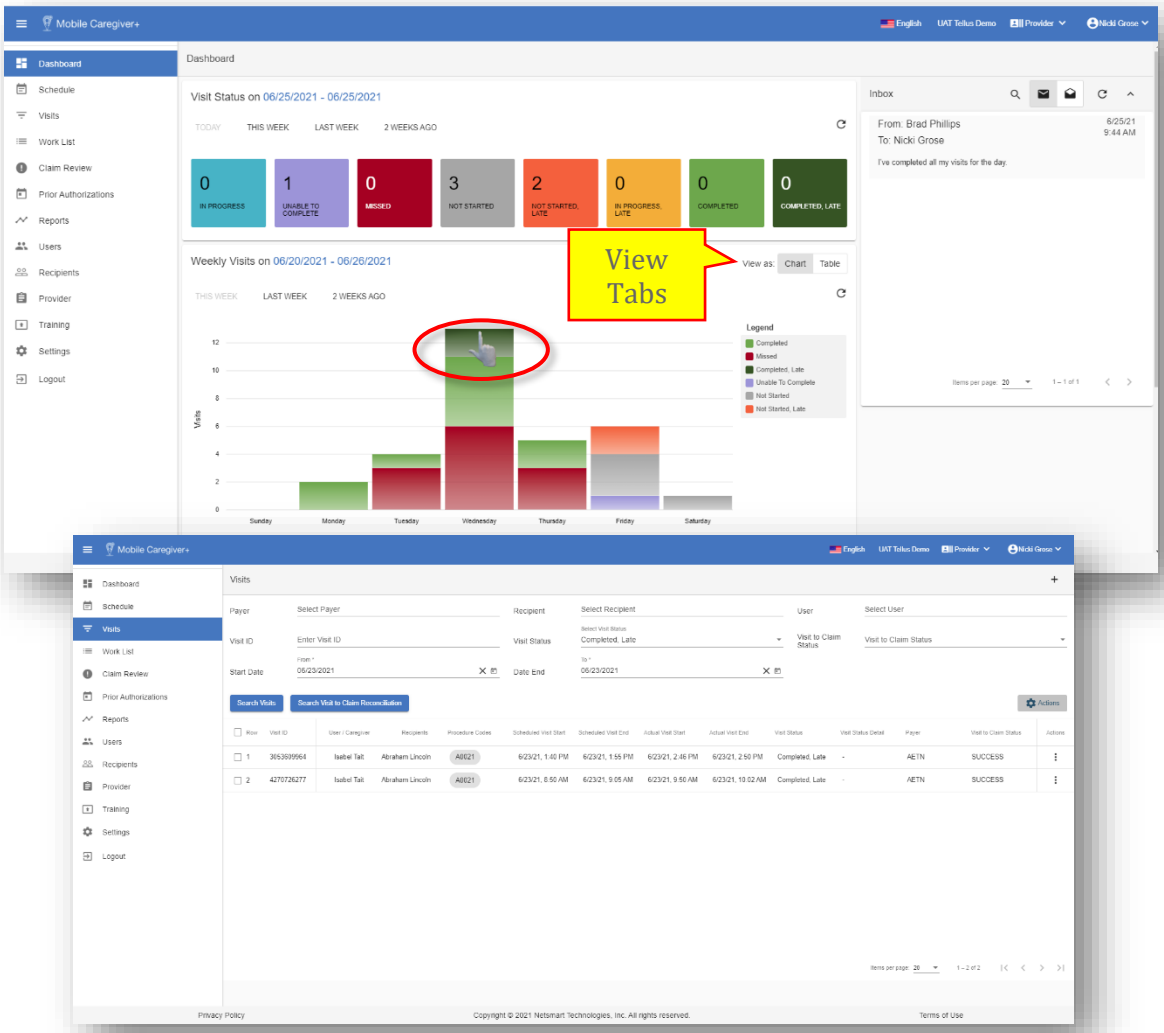
You are here: *Mobile Caregiver+ Administrator User Guide* > *Monitoring Caregivers and Visits* > Administrator Dashboard: Accessing Weekly Visit Detail

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.

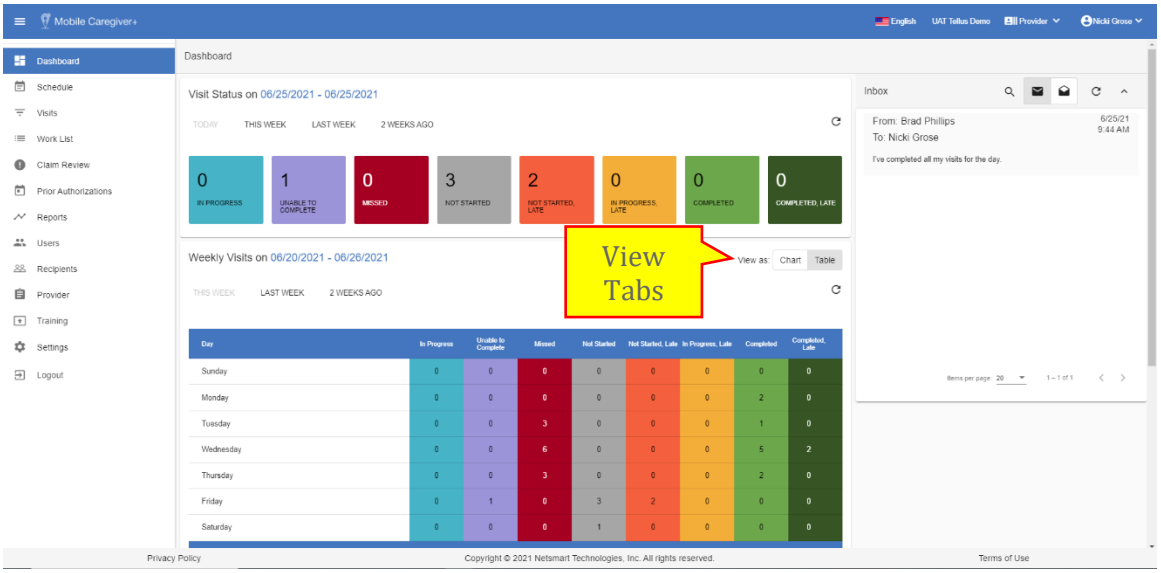
Users can click on a colored stack to view the list of the corresponding visits in the Visits screen. The example below shows the list of corresponding ***Not Started, Late*** visits for Thursday of ***THIS WEEK*** that will be displayed in the ***Visits*** screen. Users may have to scroll down to view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

Weekly Visits Chart Report



The Table report depicts a list chart which displays the total number of visits by status for each day of the selected week.

Weekly Visits Table Report



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

Related topics:

- *Accessing Visit Status Detail*
- *Viewing Inbox Alerts*
- *Viewing Claims Information*

Reviewing the Inbox

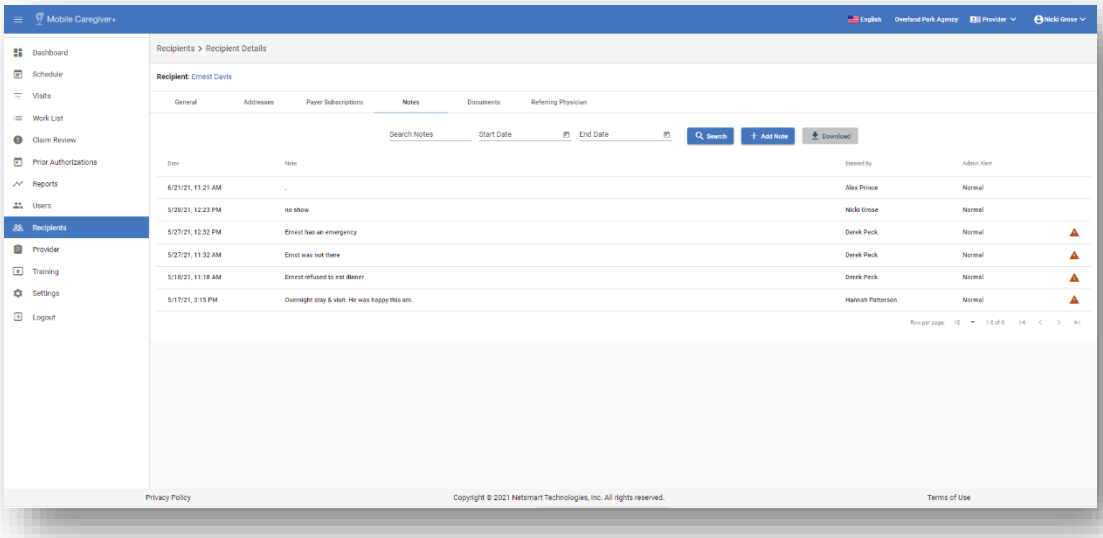
You are here: *Mobile Caregiver+ Administrator User Guide* > *Monitoring Caregivers and Visits* > Administrator Dashboard: Viewing Inbox Alerts

The **Inbox** displays the following HIPPA compliant data:

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

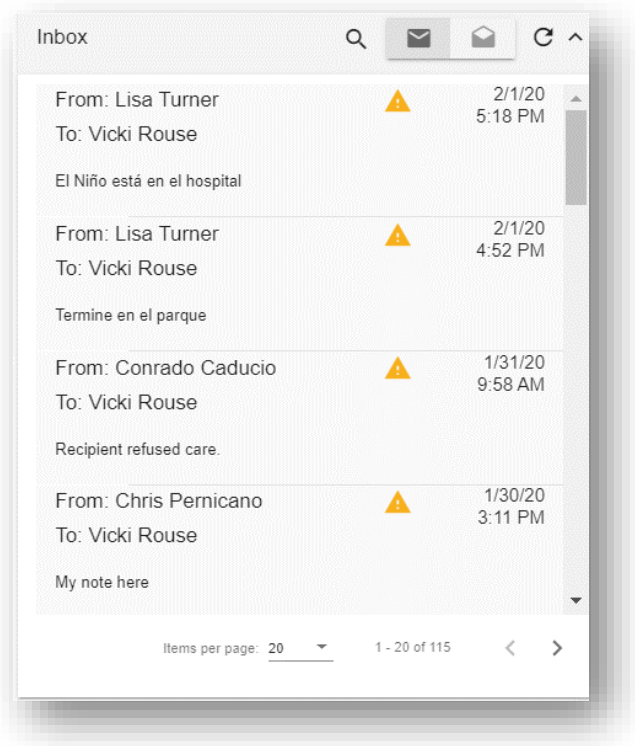
When Caregivers enter notes in scheduled visit and check-of the ***Alert My Administrator*** option, the note will appear the **Inbox** on the Administrator Dashboard. Administrators can click a note to read the full text.

Inbox

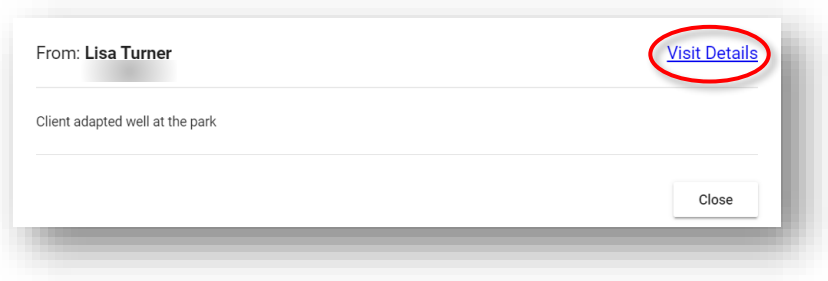


Data displayed on the **Dashboard,** including the **Inbox,** automatically refreshes every 600 seconds by default. Users can change how frequently the **Inbox** refreshes by using the ***Settings*** menu option to configure the Message Auto-Refresh Timer. Users can manually refresh the **Inbox** data 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.

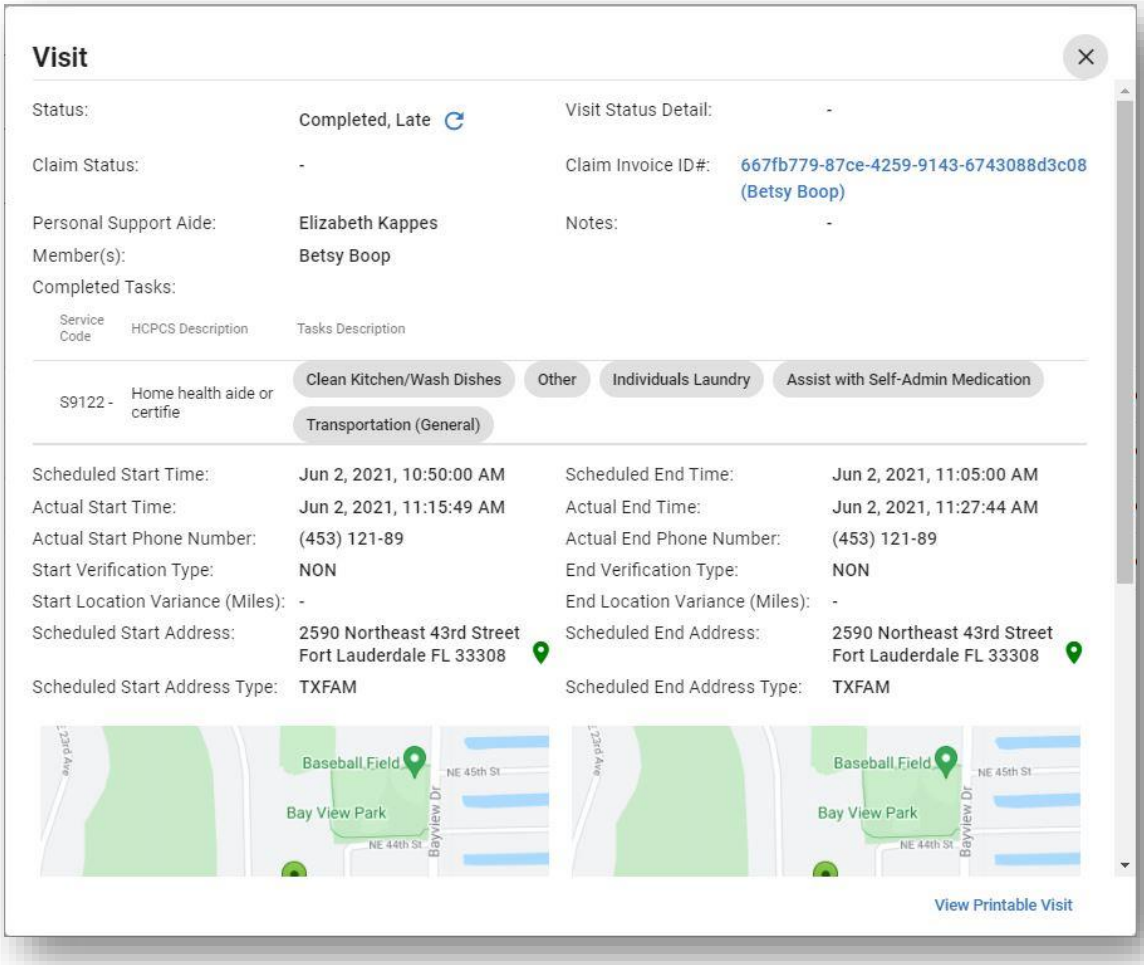


Note: A yellow triangle with an exclamation mark, , *indicates that the corresponding message is a note, an alert, that was sent by a Caregiver. Click a message to open it.*



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 Details



The Visit Details form displays scheduling details for all scheduled visits; the form also displays actual visit data for completed visits.

Related topics:

- *Accessing Visit Status Detail*
- *Accessing Weekly Visits Detail*
- *Viewing Claims Information*

Reviewing the My Claims Work Queue Report

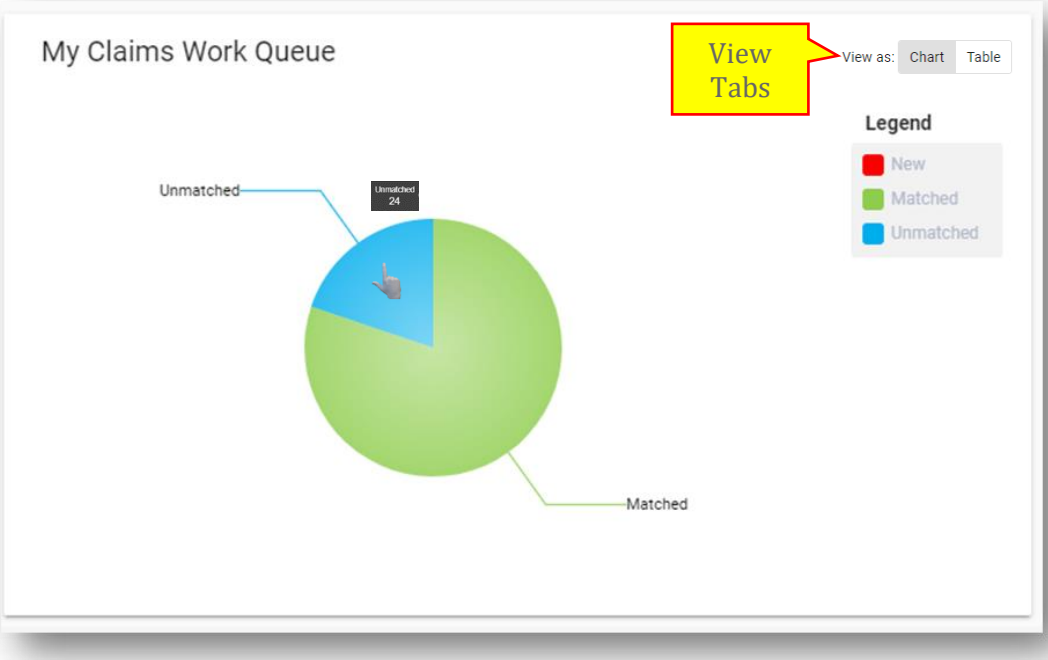
You are here: *Mobile Caregiver+ Administrator User Guide* > *Monitoring Caregivers and Visits* > Administrator Dashboard: Viewing My Claims Work Queue

This feature is only available for Providers that are have Mobile Caregiver+ Claims subscriptions.

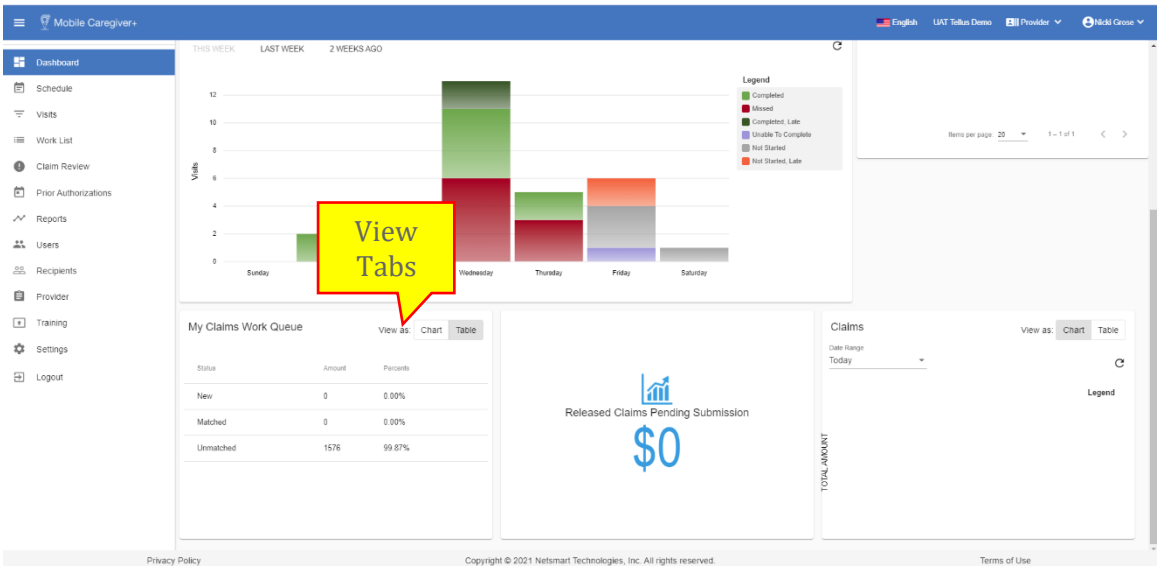
The My Claims Work Queue report displays screening, pre-adjudication, results for billable service records in the Work List. Users can configure the system to display a Pie Chart or a Table of New, Matched, and Unmatched service records in the Work List.

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

My Claims Work Queue Chart Report



My Claims Work Queue Table Report



Reviewing the Released Claims Pending Submission Report

This feature is only available for Providers that have Mobile Caregiver+ Claims subscriptions.

The Release Claims Pending Submission Report displays the grand-total estimated payment amount for matched services that have been released for claims submission.

- Click on the total estimated payment amount displayed to view the corresponding list of released claims in **Claims Review.**

Released Claims Pending Submission Report

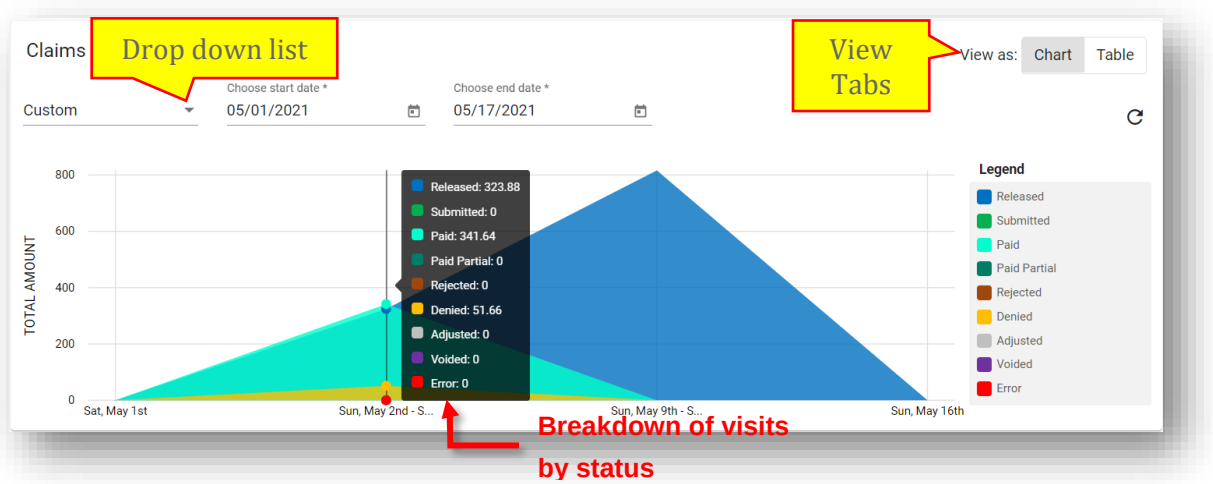
Reviewing the Claims Report

This feature is only available for Providers that are have Mobile Caregiver+ Claims subscriptions.

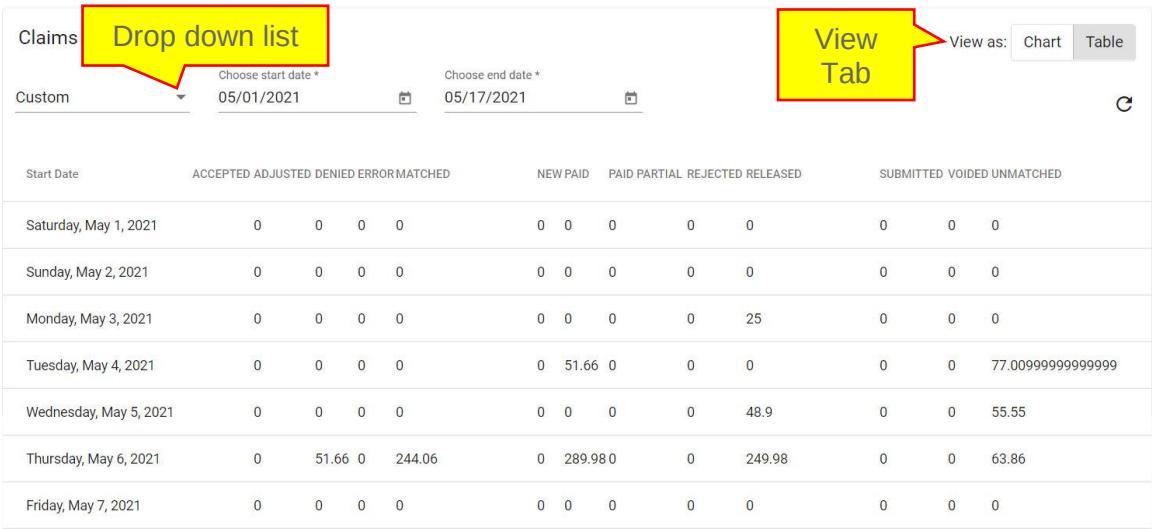
- The Claims section of the Dashboard displays status and remittance data for all billable services that have been released from the **Work List.** Users can configure the system to display a Pie Chart or a Table depicting all billable service records that have been released from the Work List i.e.,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

Claims Chart Report



Claims Table Report



Start Date	ACCEPTED	ADJUSTED	DENIED	ERROR	MATCHED	NEW	PAID	PAID PARTIAL	REJECTED	RELEASED	SUBMITTED	VOIDED	UNMATCHED
Saturday, May 1, 2021	0	0	0	0	0	0	0	0	0	0	0	0	0
Sunday, May 2, 2021	0	0	0	0	0	0	0	0	0	0	0	0	0
Monday, May 3, 2021	0	0	0	0	0	0	0	0	25	0	0	0	0
Tuesday, May 4, 2021	0	0	0	0	0	51.66	0	0	0	0	0	77.00999999999999	
Wednesday, May 5, 2021	0	0	0	0	0	0	0	0	48.9	0	0	55.55	
Thursday, May 6, 2021	0	51.66	0	244.06	0	289.98	0	0	249.98	0	0	63.86	
Friday, May 7, 2021	0	0	0	0	0	0	0	0	0	0	0	0	

Related topics:

- *Accessing Visit Status Detail*
- *Accessing Weekly Visits Detail*
- *Viewing Inbox Alerts*

Scheduling

You are here: *Mobile Caregiver+ Administrator User Guide* > Scheduling Visits

Click a topic below:

- Viewing the Schedule
  - Scheduler View: Overview
  - Calendar View: Overview
  - General Navigation for Scheduler or Calendar View
- Adding or Scheduling a Visit
  - Adding a Visit: Entries
    - Select Recipients
    - Select Caregiver
    - Select Services
    - Select Visit Locations
    - Select Date and Time
    - Select Visit Recurrence

Viewing the Schedule Calendar

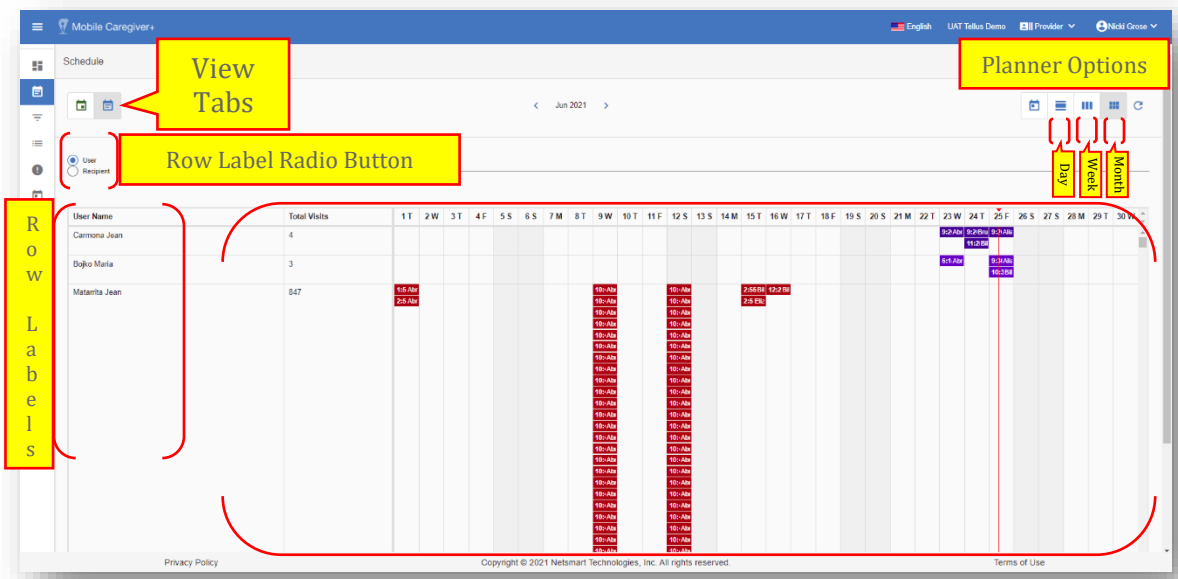
You are here: *Mobile Caregiver+ Administrator User Guide* > *Scheduling* > Viewing the Schedule

The Schedule Calendar displays a calendar chart, which depicts all scheduled visits in a Provider's Mobile Caregiver+ Portal. The Schedule menu option allows providers to view existing scheduled visits, check for availability, and to 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. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).
2. Select the **Schedule** option**.**

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.

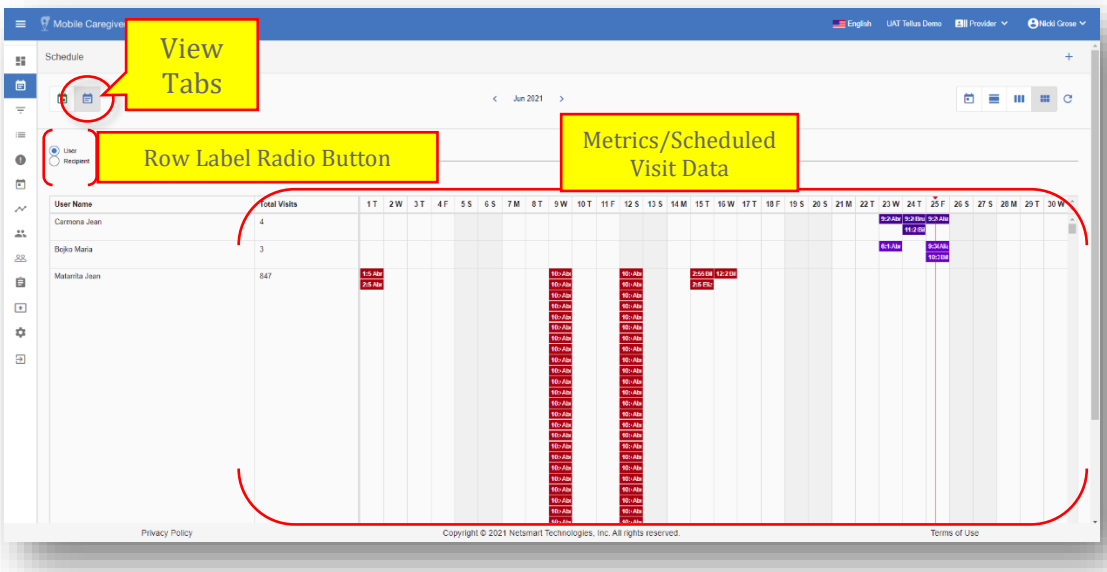


There are two views for the Schedule: *Schedule View* and *Calendar View*. Each is described in the sections that follow. Navigation is similar for both and is described in *General Navigation for Scheduler or Calendar View*.

Schedule View

You are here: *Mobile Caregiver+ Administrator User Guide* > *Scheduling* > *Viewing the Schedule* > Schedule View:

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



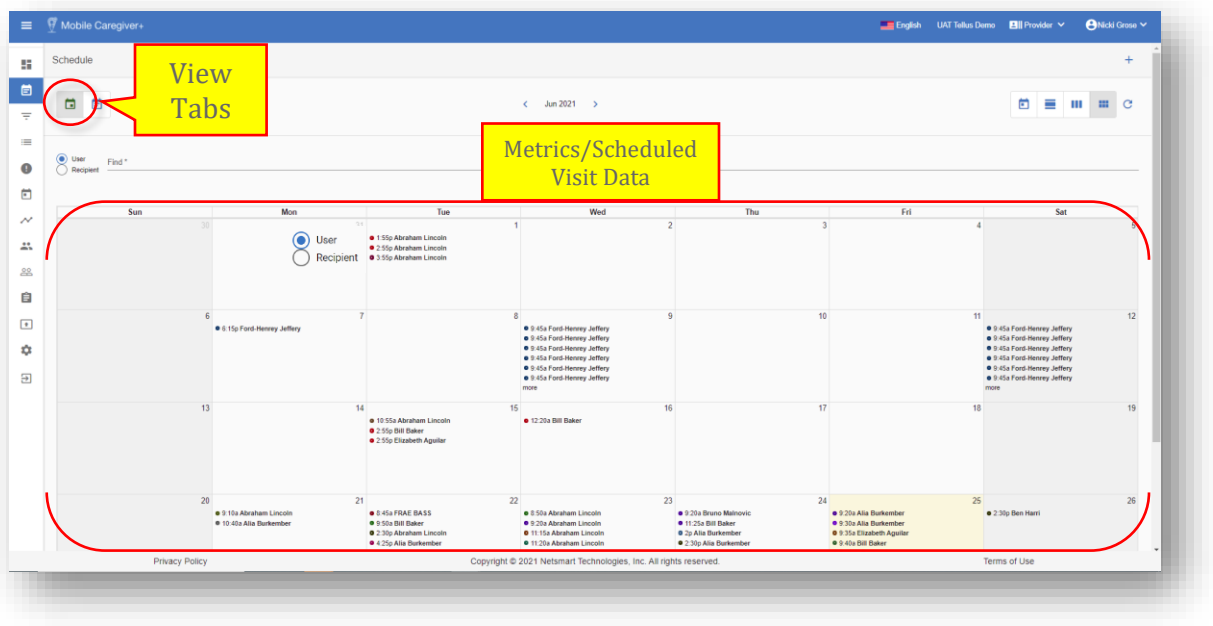
The **Scheduler view** chart displays the following:

- **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 scheduled Caregiver in the **Name** column; if **Recipient** is selected the Recipient names will be displayed as the row labels.
- **Find**: This 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, calendar period.
- **Time:** The time the visit will start; a colored bar indicates how long the visit is scheduled for.

Calendar View

You are here: *Mobile Caregiver+ Administrator User Guide* > *Scheduling* > *Viewing the Schedule* > Calendar View:

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



Calendar View displays all scheduled visits for Users or Recipients within the selected calendar period. The **Calendar view** chart displays:

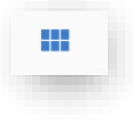
- The User/Recipient name and the start time is displayed for each scheduled visit that appears in the list.
- The days are displayed as column headers for the list.

You can use the **Next** and **Previous** buttons at the top of the page to change the time period. See *General Navigation for Scheduler or Calendar View*.

General Navigation for Scheduler or Calendar View

You are here: *Mobile Caregiver+ Administrator User Guide* > *Scheduling* > *Viewing the Schedule* > General Navigation

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

Icon	Description
Today	Reset the calendar to the default view, displaying scheduled visit for current day.
Day	Configures the Schedule Calendar to display daily planner, , displaying scheduled visit for one day.
Week	Configures the Schedule Calendar to display weekly planner, , displaying scheduled visit for one week.
 Month	Configures the Schedule Calendar to display Monthly planner, displaying scheduled visit for one month.

Icon	Description
Next	Allows Users to scroll forward between months, weeks, or days, depending on the selected planner. If the User selected Month, the system will display scheduling data for monthly time intervals; if the User selected Week, the system will display scheduling data for weekly time intervals; if the User selected Day, the system will display scheduling data for daily time intervals.
Previous	Allows Users to scroll backward between months, weeks, or days, depending on the selected planner. If the User selected Month, the system will display scheduling data for monthly time intervals; if the User selected Week, the system will display scheduling data for weekly time intervals; if the User selected Day, the system will display scheduling data for daily time intervals.
Reload	Reloads, refreshes, the page with the most recent schedule data.
Add new visit	Allows Users to schedule, add new visits, the agency's Mobile Caregiver+ Portal.

Users can add a visit directly from the **Schedule** page by clicking the "add visit "icon, + in the upper right corner of the screen.

Related Topic

- *Adding or Scheduling a Visit*

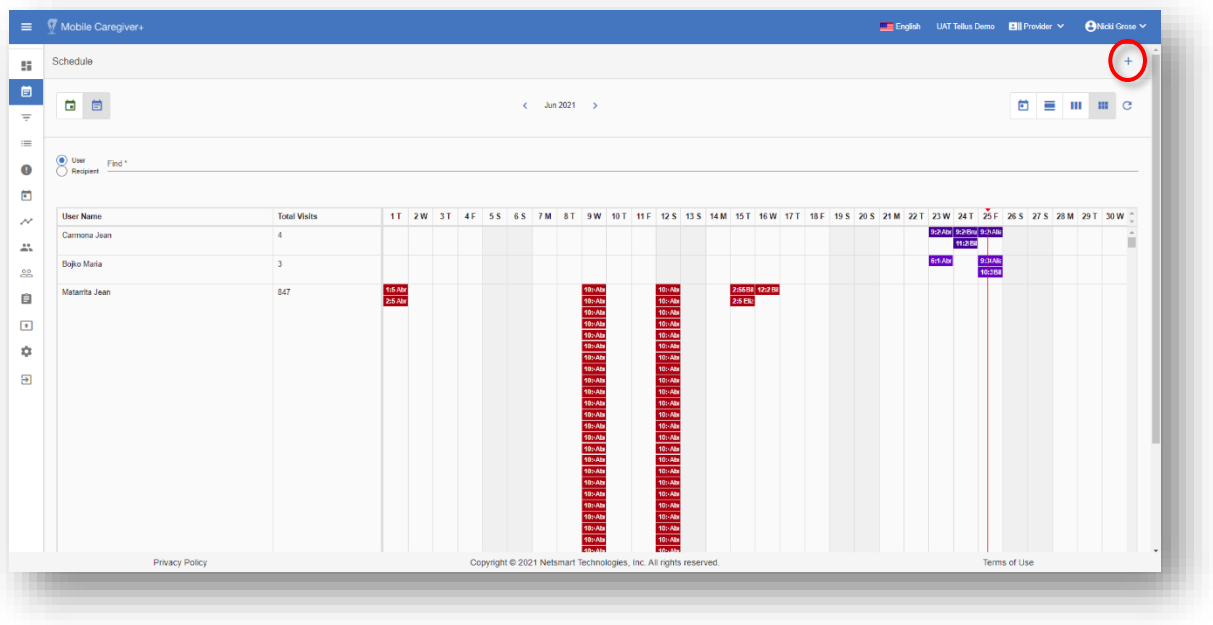
Adding/Scheduling Visits

You are here: *Mobile Caregiver+ Administrator User Guide* > *Scheduling* > Adding/Scheduling a Visit

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 6 sections. Users can use the **Add New Visit** form to schedule single (one-time) or recurring visits.

To schedule new visits:

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



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

From the **Add New Visit** form, follow the directions below, *Adding a Visit: Entries,* to configure the visit options for each section.

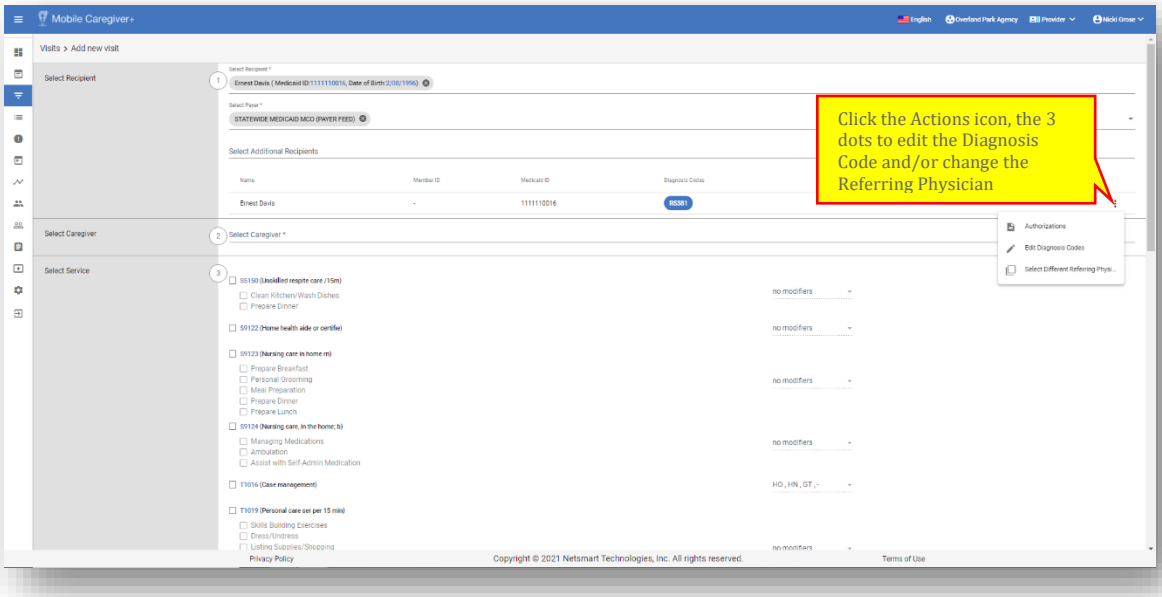
Click ***Save*** when you finish making your entries.

Adding a Visit: Entries

You are here: *Mobile Caregiver+ Administrator User Guide* > *Scheduling* >*Adding or Scheduling a Visit* > Adding a Visit: Entries

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

Section 1 - Select Recipient(s)



1. Make the following entries and selections:

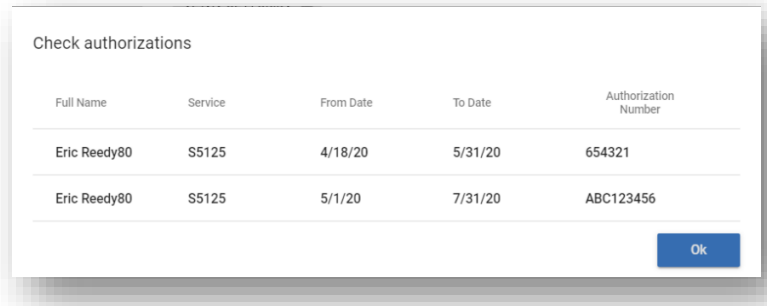
- **Select Recipient**: Use the dropdown list to select the Recipient who is being scheduled to receive service(s).
- **Select Payer*:*** This field is automatically populated with the default Payer that has been configured for the selected Recipient.
- **Select Additional Recipients**: Users can use the drop-down list to select additional Recipients, for example, if the visit is for siblings, a group of children, or spouses that are seen at the same time.

  The system will automatically fill in the Diagnosis Code(s) and/or Referring Physician for the selected the Recipient.

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

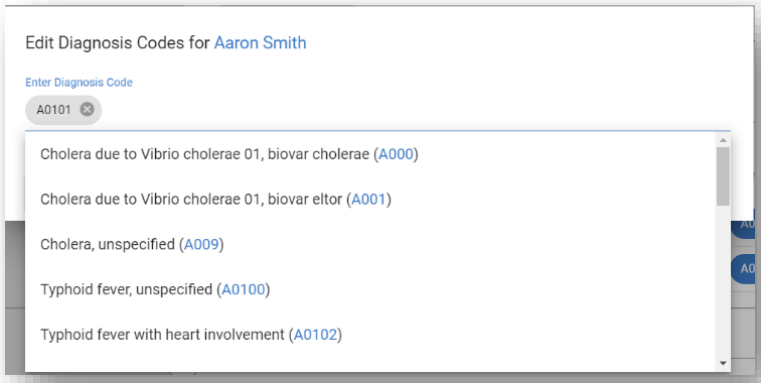
2. Click **Actions** icon, ⁝, located to the right and of the right of the Recipient's name to select one of the following options:

– **Authorizations**: Displays a list of all authorization that are currently loaded in the Mobile Caregiver+ system for the selected Recipient.



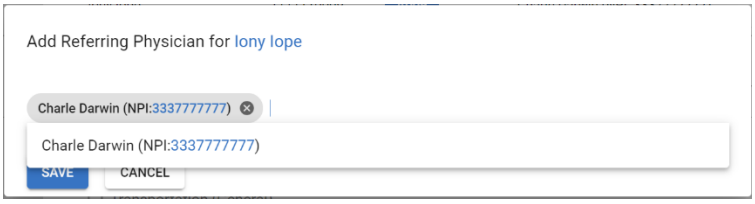
– **Edit Diagnosis Codes**: Allows Users to add/update the Diagnosis Codes for the selected Recipient.

Note: It is dependent on the Payer and Program, whether Providers are able 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.

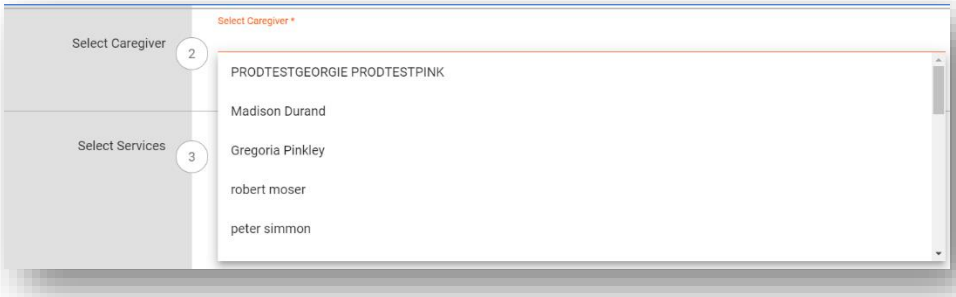


– **Select a Different Referring Physician**: Allows Users to change default Referring Physicians.

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



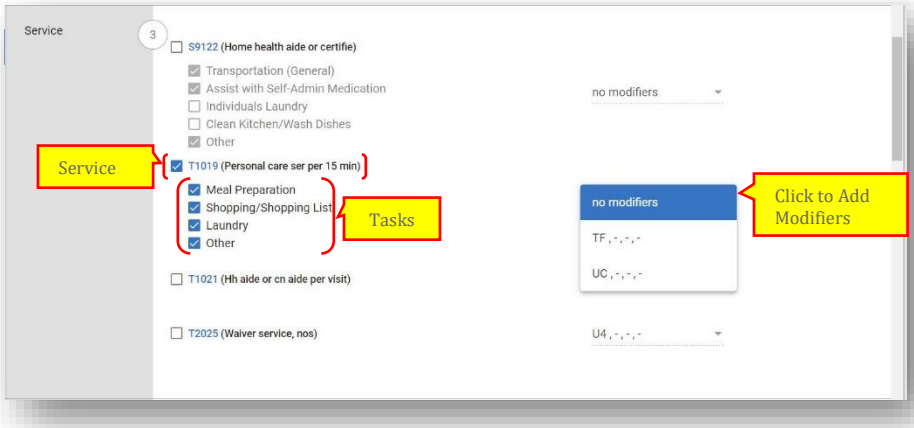
Section 2 - Select Caregiver



1. Click the Select Caregiver field and use the dropdown list to select the Caregiver who will perform the visit to complete the assigned service(s) and task(s).

Section 3 - Select Services

The system will display a list of all billable service codes for the Payer. Depending on the Payer and program, some Provider may be allowed to schedule multiple services in a single visit. Payers can also set prerequisite license/certification requirements for services.

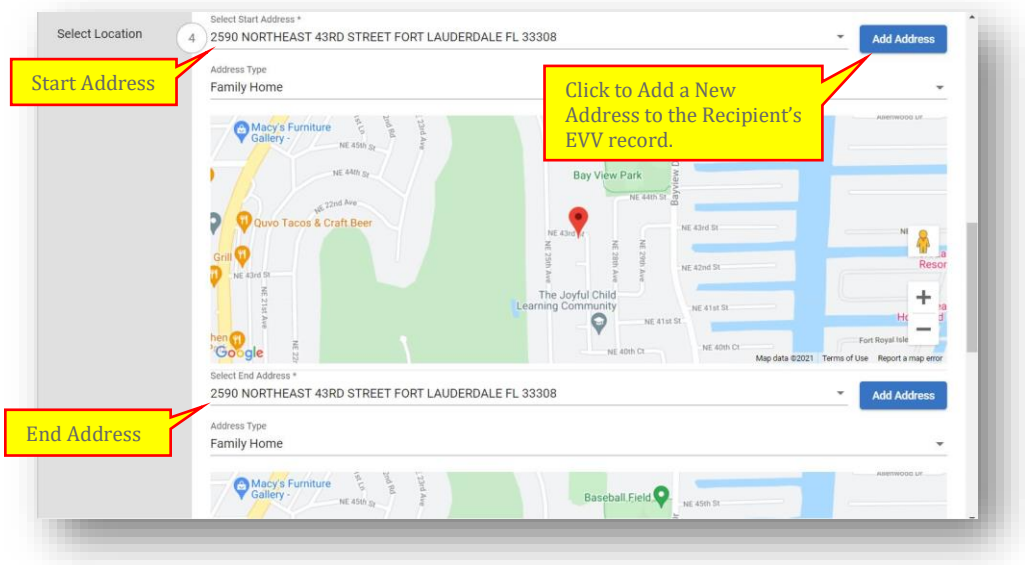


1. Select the service(s) that are being assigned by placing a checkmark in the checkbox next to the respective service code(s).

- Select any Task(s) that are being assigned by placing a checkmark in the respective checkbox. Uncheck any Task(s) that are not being assigned.
- Click in the Modifiers field to select any modifiers that are listed in the **Prior Authorization**.

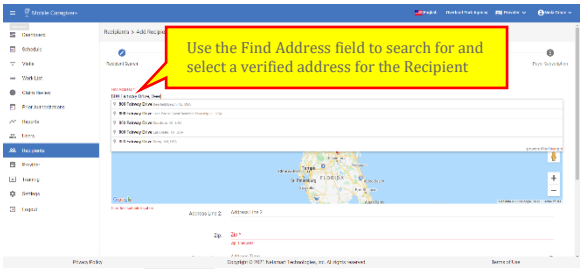
Section 4 - Select Visit Locations

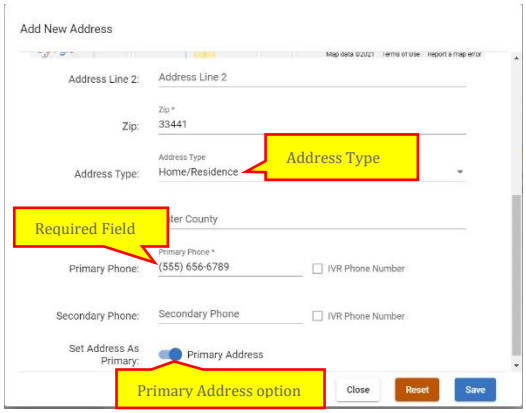
The 21st Century Cures Act stipulates that EVV visit data must include the location where the Caregiver will start rendering billable services, and the location where billable services end; by default, the Mobile Caregiver+ System will automatically load the Recipient's designated primary address as the Start Address and End Address for billable services. 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.



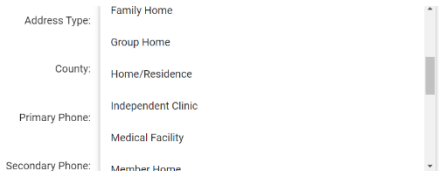
2. **Select Start Address** and **Select End Address**: Both fields are automatically populated with the Recipient's primary address; if this is the correct address where the visit a will start and end, no further actions are required. Users can replace the either the Start Address, End Address, or both.

– To add a new address for the Recipient, click on the **Add Address** command, Add Address.



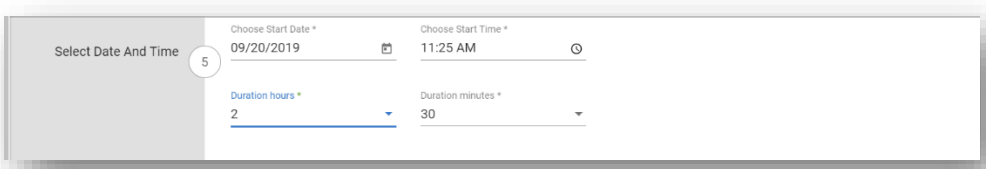


- **Find Address**: Start typing the new address in the **Find Address** field -- the system will display a list of verified addresses that match the data being entered.
- From the list, select the correct address to be added to the Recipient's EVV record.
- **Address Type**: Click in the **Address Type** field to select the type (descriptive designation) for the service address.



- **Primary Phone:** Enter the Recipient's phone number.
- **Set Address as Primary**: Place in checkmark in the checkbox to designate the new address as the Recipient's Primary Address.

Section 4 - Select Date and Time



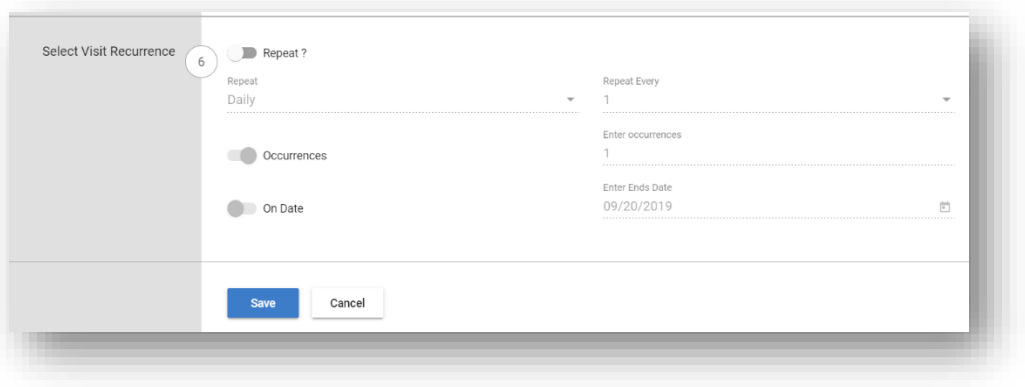
– **Choose Start Date:** Manually type-in, or click on the calendar icon, , to enter the date the visit will start on.

– **Choose Start Time:** Click on the clock icon, , to enter the start time for the visit. The time is limited to 5-minute increments.

Note: In order 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):

- **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.
- **Duration minutes:** Enter the total number of minutes in the in the time need 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.

Select Visit Recurrence

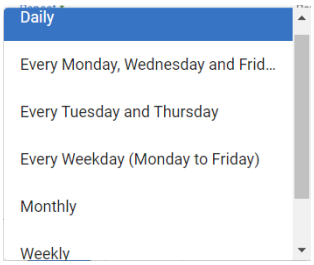


Users can configure recurring visit by activating and completing section 6. In order to scheduling a visit as a recurring/repeating visit, the visit data being scheduled must be identical, such as:

- Recurring visits must start and end at the same location.
- 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.

1. **Is Repeat?:** Activate the Recurrence/repeat option by clicking on the **IS Repeat?**, , switch. The **IS Repeat?** switch will slide to the right and changes from white to a blue when activated.

2. **Repeat:** Use Repeat field to configure/set the recurring visit pattern/frequency.



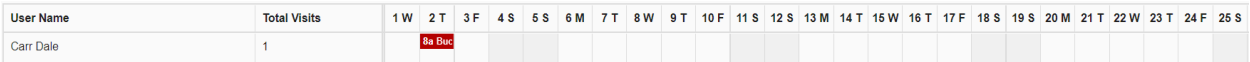
- **Daily** – Select the **Daily** option to schedule a recurring visit for each day of the week.

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

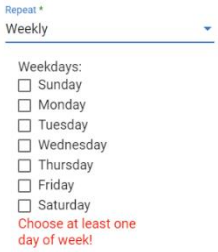
- **Every Tuesday and Thursday** – Select the preconfigured **Tuesday and Thursday** option to schedule 2 visits per week, on the respective days.

- **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.

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



- **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.

3. **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 interval selected for the **Repeat** option – Users can select a numeric value to configure the recurring visits to skip 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
Every Monday, Wednesday, Friday	3	Mondays, Wednesdays, and Fridays every 3rd 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
Yearly	1	Every year
Yearly	2	Every other year
Yearly	3	Every third year

After configuring all recurrence options, User must select one of two expiration options for the recurring visit:

4. **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

5. **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 visit can be scheduled up to 1 year, 52 weeks, from the **Start Date** entered in section 5.
6. *Note: Users can either choose the **Occurrences** or **On Date** expiration option; Users cannot choose both.*

   *Note: Users must click **Save** after configuring all scheduling parameters.*

Related Topic

- *Viewing the Schedule*

Managing Visits

You are here: *Mobile Caregiver+ Administrator User Guide* > Managing Visits

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

Click a topic below:

- Accessing the Visits *List*
  - Viewing Visits
  - Changing the Number of Visits Displayed Per Page
  - Searching for a Specific Visit
- Viewing Visit Details
- Completing a Visit
- Canceling a Missed or Late Visit
- Updating a Visit
- Printing Visit Detail
- Deleting a Visit

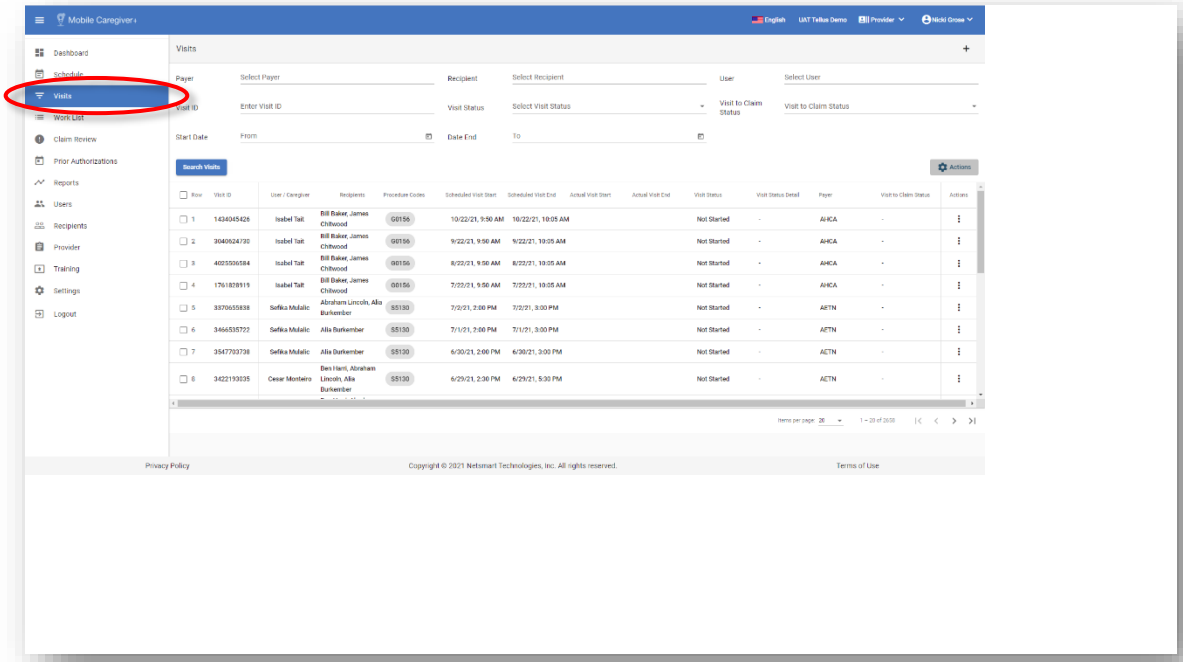
Accessing the Visits List

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Visits* > Accessing the Visits List

To access Visits list:

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

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



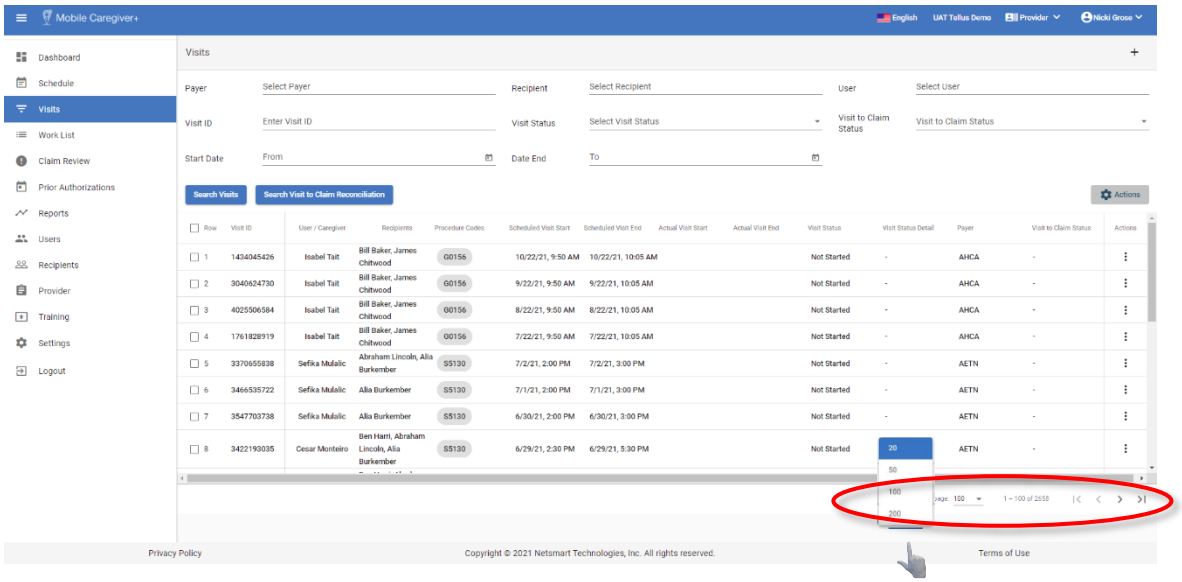
Changing the Number of Visits Displayed Per Page

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing the Visits List* > Changing the Number of Recipients Displayed Per Page

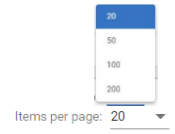
By default, the **Visits** list will display 20 records at-a-time on the screen; to change the number of visits, records, that are displayed on each page:

1. Scroll to the bottom of the screen.

   Click the **Items per page** dropdown list arrow and select the number of records the to be displayed per screen.



When there are multiple pages visit, use the navigation arrows (icons) to scroll back and forth 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 visit.
1 – 20 of 854	Navigate to the first page of visits.

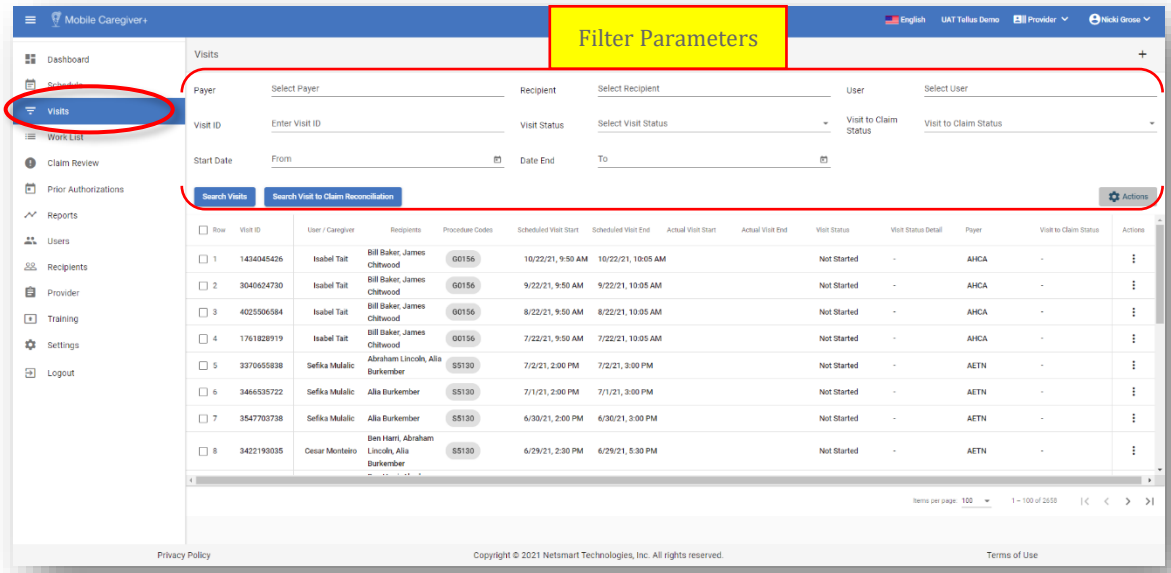
Icon	Description
1 – 20 of 854 <	Navigates back to the previous page of visits.
1 – 20 of 854 >	Navigates forward to the next page of visits
1 – 20 of 854 >|	Navigates to the last page of visits.

Managing the Visits List

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Visits* > Filtering the Visits List.

To filter the Visits List:

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).
2. Click **Visits** to open the Visits List.



3. Users can filter the **Visits** list chart 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. Users must select a payer in order to use the **Search Visit to Claim Reconciliation** function.
Recipient	The Recipient field has a list of all active recipients that are enrolled with the active agency. Users can filter the Visits

Field Name	Filter Description
	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 linked to the active agency. Users can select a User (Caregiver) to filter the Visits list to only display visits that are scheduled for the selected User.
Visit ID	The Visit ID field allows Users to search for a specific visit. Users can enter a Visit ID to filter the Visit list to display a specific visit.
Visit Status	The Visit Status field display a list of visit statuses for scheduled visits i.e., **IN PROGRESS, UNALBLE 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 Status 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 in order to filter the Visits list by a 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 in order to filter the Visits list by a date range.

Field Name	Filter Description
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 claims status information for completed visit – The Visit to Claims Reconciliation can be used to view the current status of billable service in the Work List and in Claims Review. Users must select a Payer in order to use the Visit to Claims Reconciliation function.

4. Click ***Search Visits*** after selecting all filter parameters.

Related topics:

- *Adding or Scheduling a Visit*
- *Viewing Visit Details*
- *Completing a Visit*
- *Canceling a Missed or Late Visit*
- *Managing Scheduled Visits*
- *Printing Visit Details*
- *Deleting Note Started Visit*

Viewing Visit Status Details

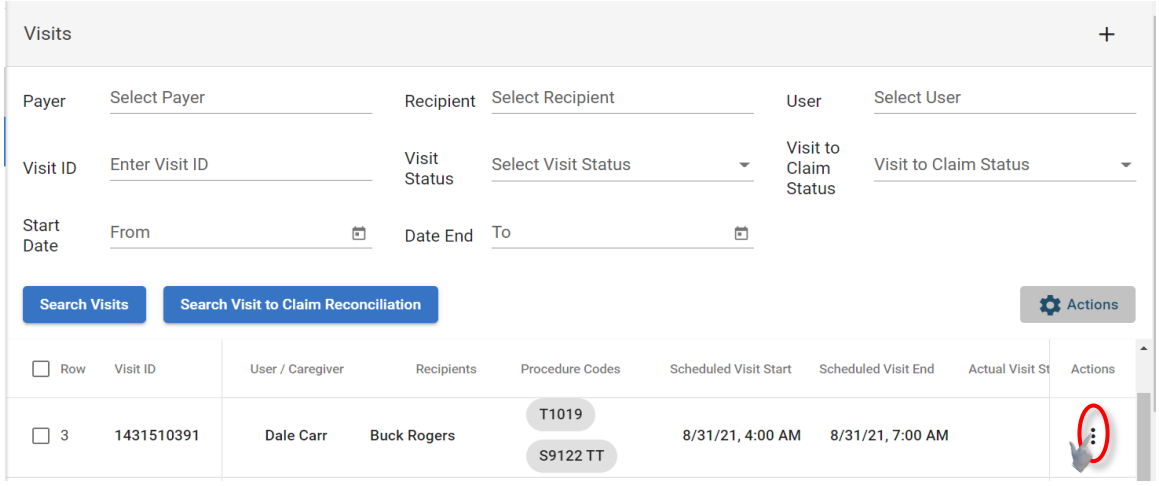
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Visits* > Viewing Visit Details

The **Visit Status Detail** screen displays scheduling, status, and reported EVV visit data for scheduled visits. Users can use the Visit Status Details screen to view the following:

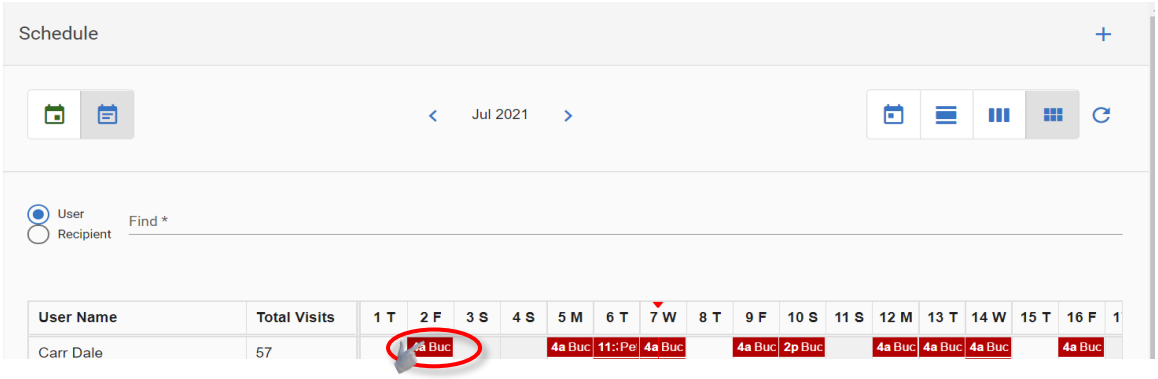
- Details, i.e., Recipient, Caregiver, Scheduled Start/End Time, Services, etc. for scheduled visits.
- Status information, i.e. Completed, Unable To Complete, In Progress, etc. for scheduled visits.
- Actual reported data for Completed/Complete Late visits, i.e. Actual Visit Start/End, Start/End Verification Type, Start/End Location Variance, etc.

There two ways to access **Visit Status Detail** screen:

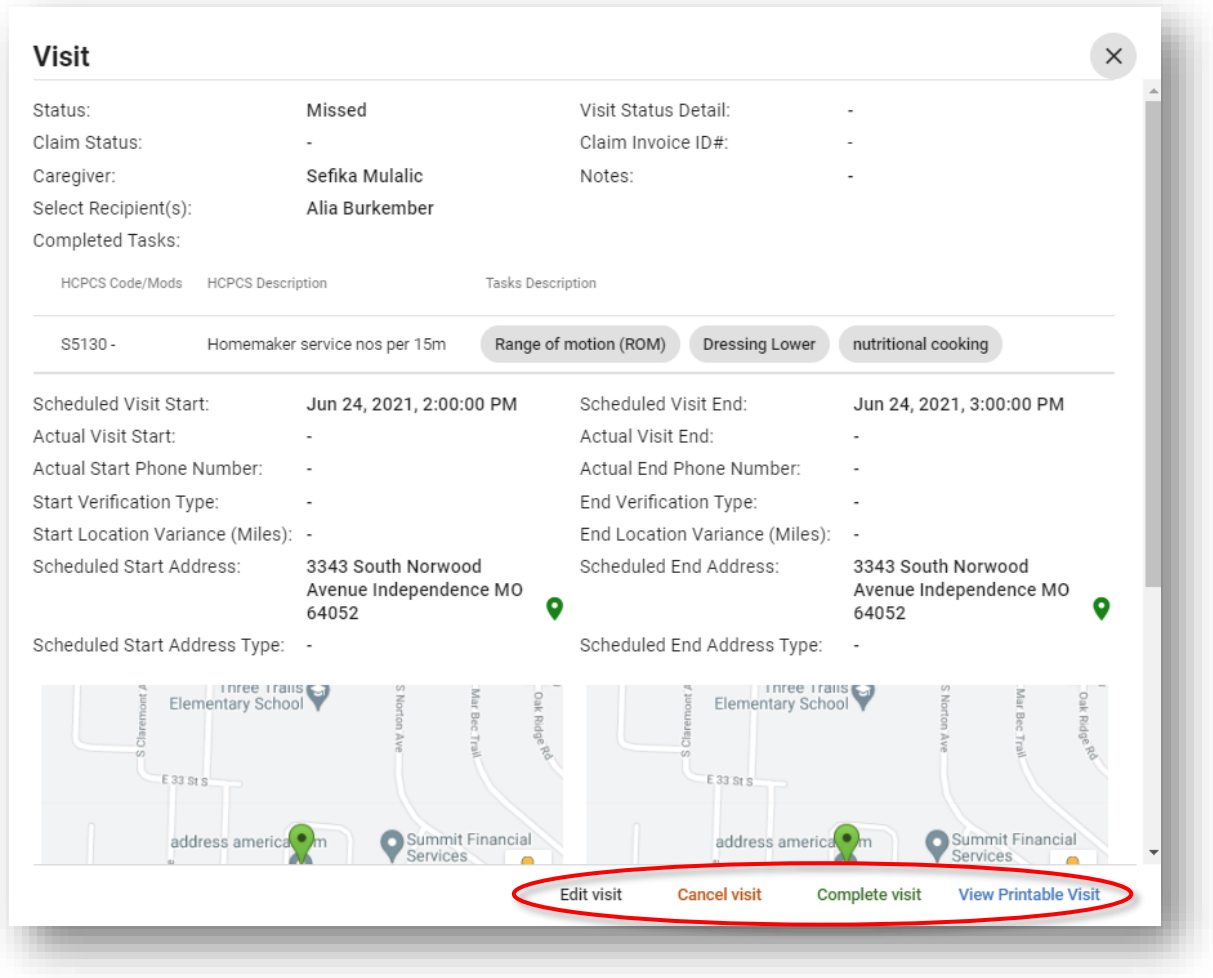
- From the **Main Menu,** click **Visits,** locate and click on the **Actions** icon, ⋮, for the visit.



- From the **Main Menu,** click **Schedule,** located and click on the bar chart` icon, 4a Buc, representing the visit.



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



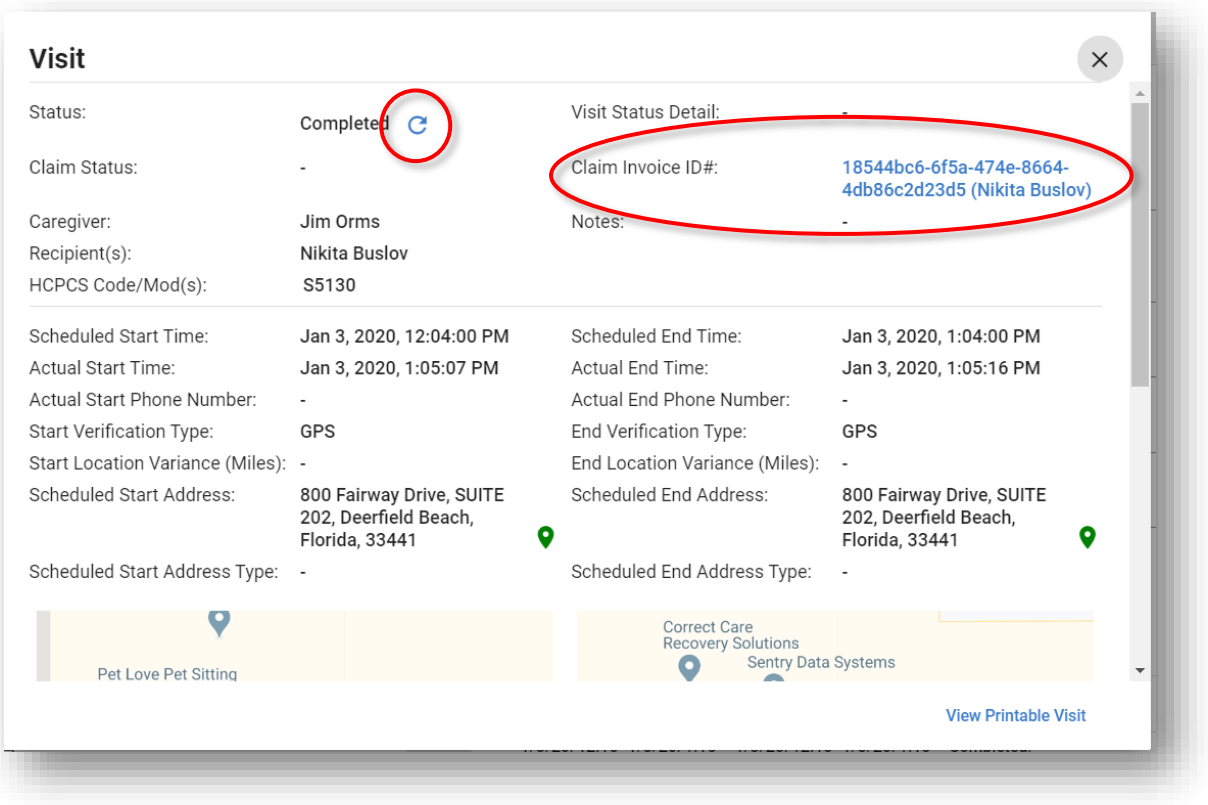
The system will display the available User options in the lower right corner of the Visit Status Detail screen. Depending on the Status of the visit User will have the following options:

Status	User Options
In Progress	Users will only be given the **Complete visit** option for any 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 the **Edit visit, Cancel visit, and Complete visit** options for any visits that have a **Missed** status.

Status	User Options
Not Started	Users will only have access to the **Edit Visit** and **Cancel visit** options for any visits that have a **Not Started** status.
Not Started, Late	Like the MISSED visits options, Users will have access to the **Edit visit, Cancel visit, and Complete visit** options for any visits that have a **Not Started, Late** status.
In Progress, Late	Users will only be given the **Complete visit** option for any visits that have an **In Progress, Late** status.
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 View Printable Visit option for all visits in the **Visit Status Detail** screen, regardless of the visit status.

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



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

Related topics:

- *Adding or Scheduling a Visit*
- *Viewing Visit Details*
- *Completing a Visit*
- *Canceling a Missed or Late Visit*
- *Managing Scheduled Visits*
- *Printing Visit Details*
- *Deleting Not Started Visit*

Completing a Visit

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Visits* > Completing a Visit

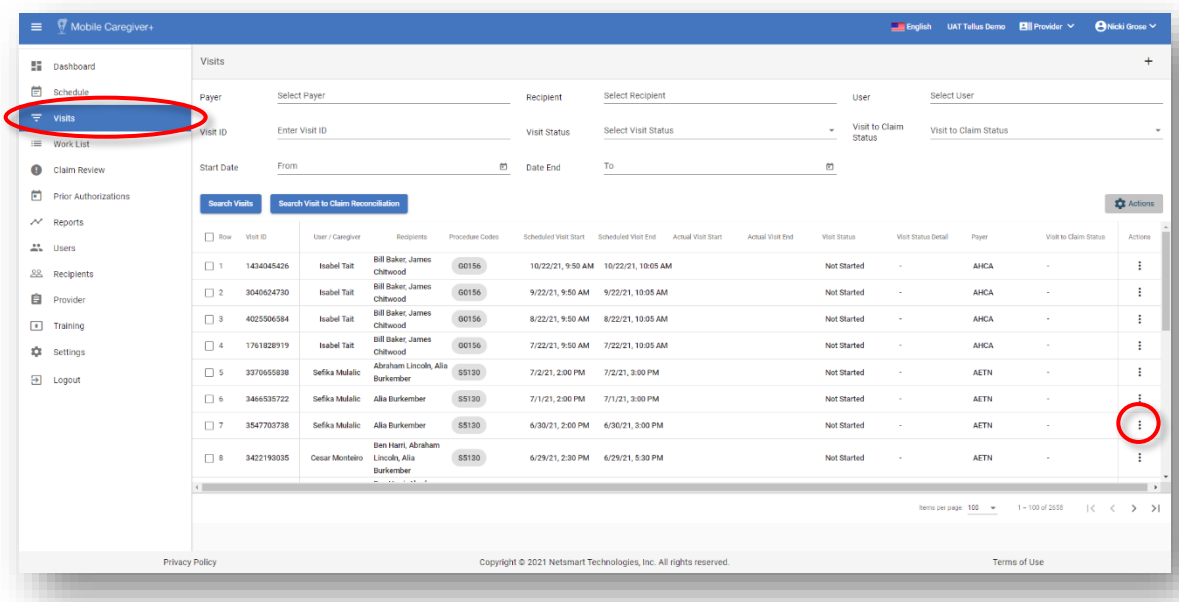
If a Caregiver does not complete a visit using their Netsmart Mobile Care+ app for some reason – the Caregiver forgot to check out, for example – you can complete the visit manually in the Mobile Caregiver+ Administrator Console. You will need to provide a reason for completing the visit manually.

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

To complete a visit using the Administrator Console:

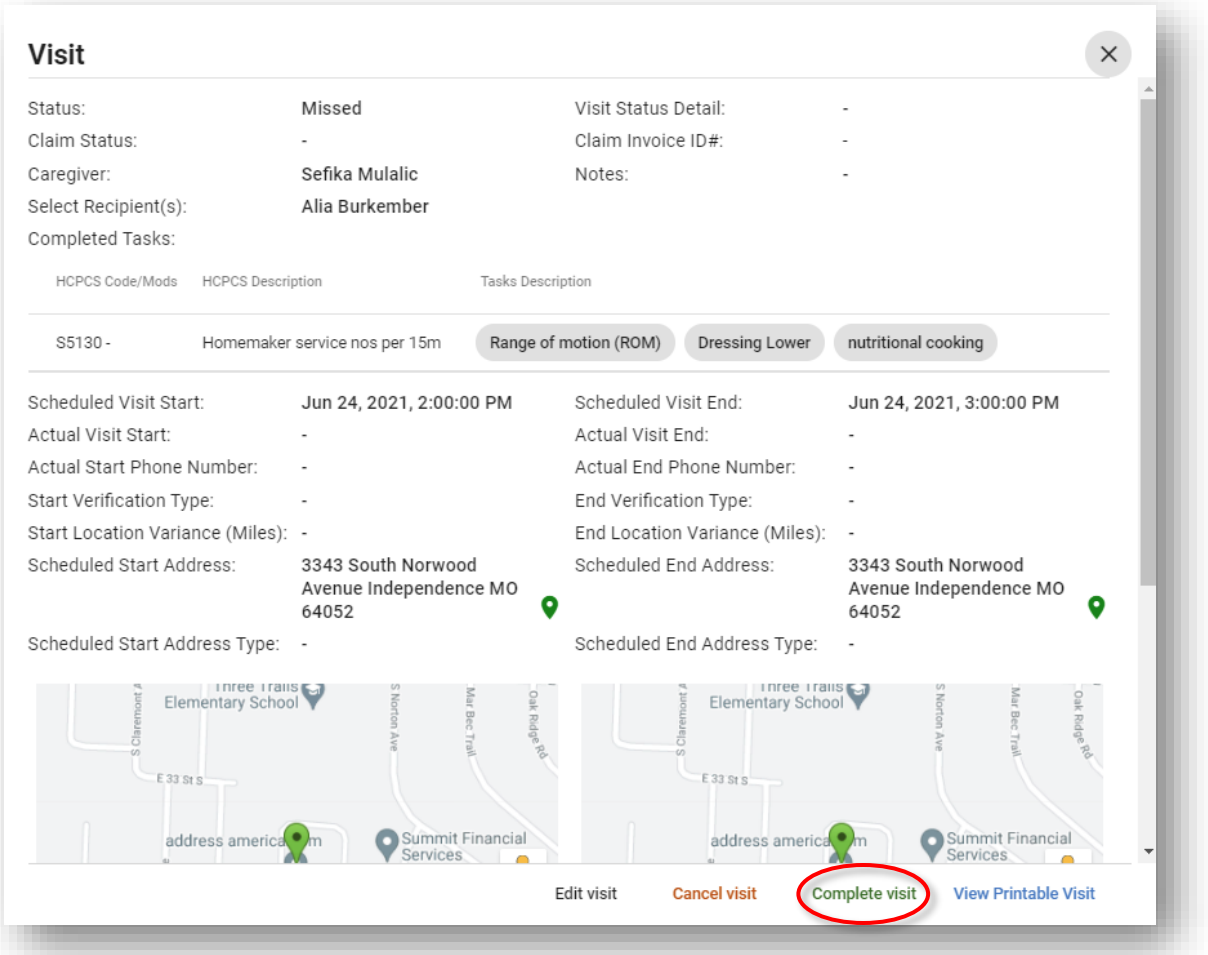
1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click **Visits**.



Find the visit you want to complete.

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

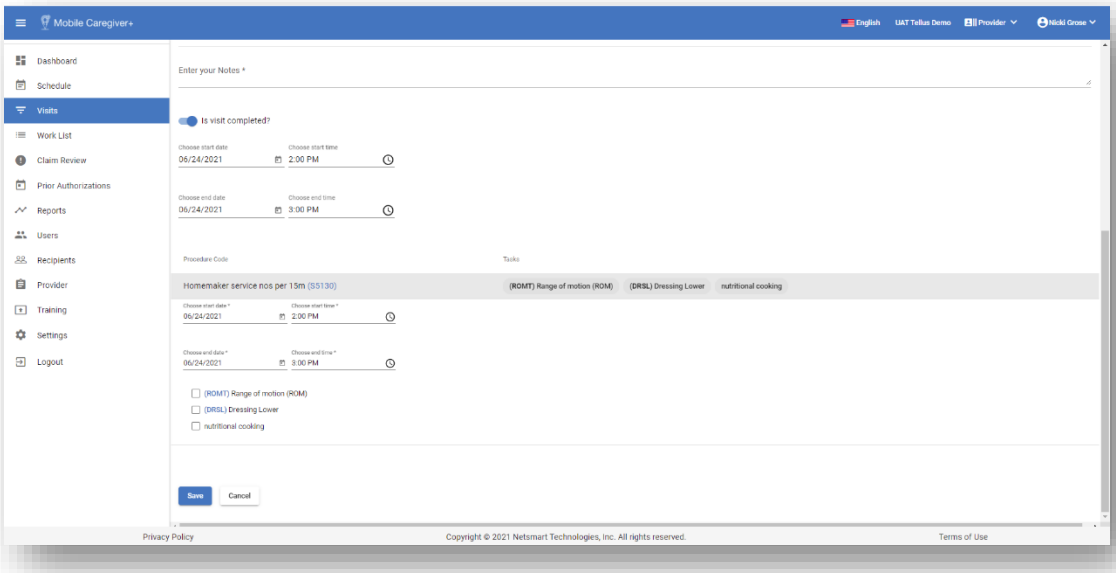


At the bottom of the **Visit** page, click ***Complete visit***.

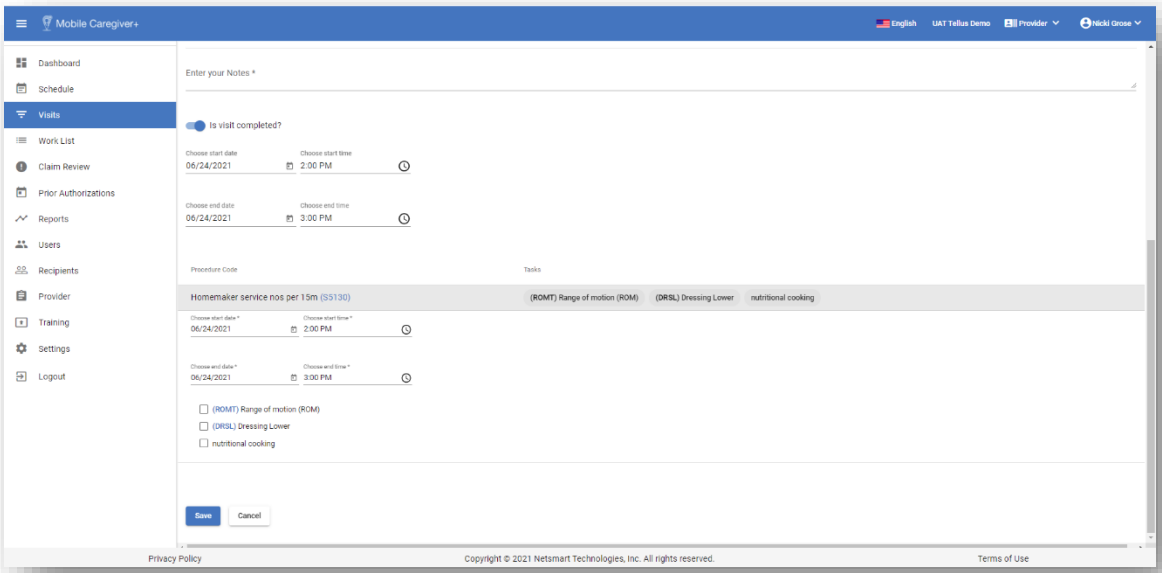
Note: See [Accessing Schedule Detail from the Administrator Console]() and [Viewing the Menu]() for additional information.

Scroll to the bottom of the page. All of the following entries are required:

- **Enter your note**: Enter notes about the visit.
- **Choose Start Date*:*** The date the visit was scheduled displays here. If it is different, click the *calendar icon* at right to select the correct start date.
- **Choose Start Time**: The time the visit was scheduled displays here. If it is different, click the *clock icon* at right to select the correct start time.
- **Is visit completed?** If the visit is complete slide the toggle to the right. Blue indicates that the visit is completed and all services and tasks display.



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



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

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

Related topics:

- *Adding or Scheduling a Visit*
- *Searching for and Viewing Visits*
- *Viewing Visit Details*
- *Canceling a Missed or Late Visit*
- *Updating a Visit*
- *Printing Visit Detail*
- *Deleting a Visit*

Canceling a Missed or Late Visit

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Visits* > Canceling a Missed or Late Visit

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

To cancel a visit:

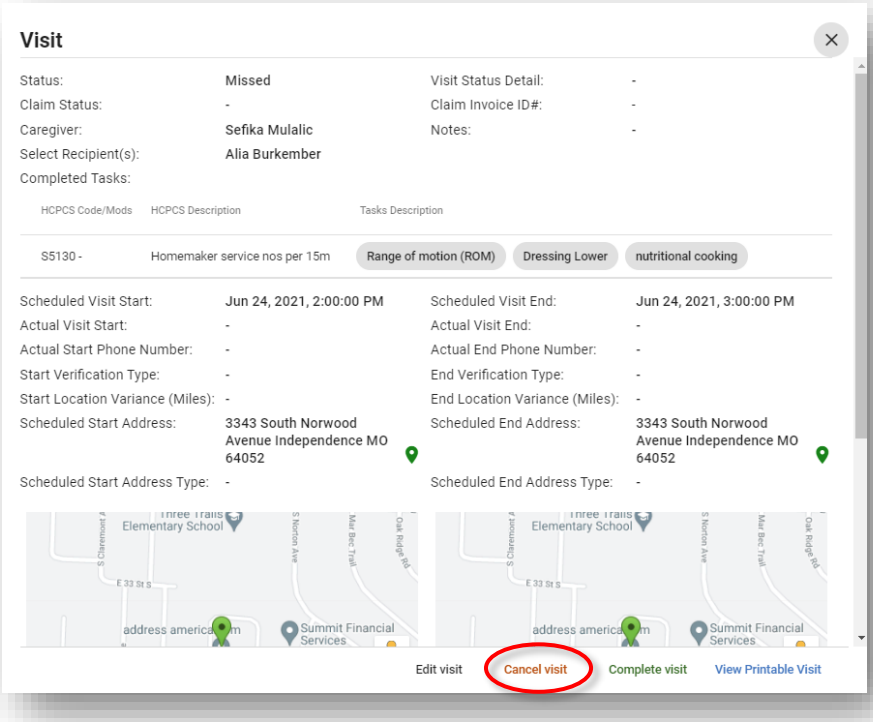
1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click **Visits**.

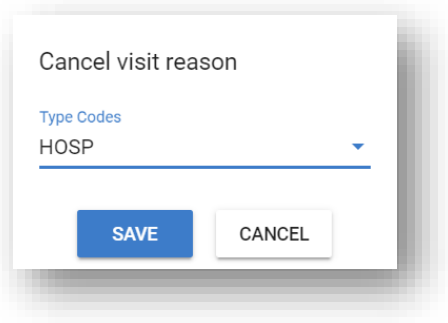
Find the visit you want to cancel.

When you see the visit that you want to cancel in the search results, click the submenu icon (vertical dots) to view details about the visit.

Click ***Cancel visit***.

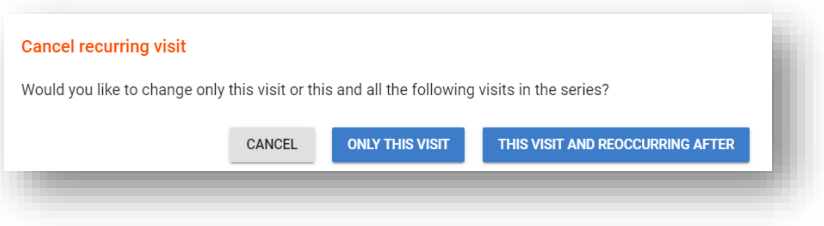


When the ***Cancel Visit*** page opens, use the drop-down list to select the reason the visit is being cancelled.



Click ***Save***.

If the visit is a recurring visit, you will have the option to cancel just the visit you selected, or all visits.



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

Related topics:

- *Adding or Scheduling a Visit*
- *Searching for and Viewing Visits*
- *Viewing Visit Details*
- *Completing a Visit*
- *Updating a Visit*
- *Printing Visit Detail*
- *Deleting a Visit*

Updating a Visit

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Visits* > Updating a Visit

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

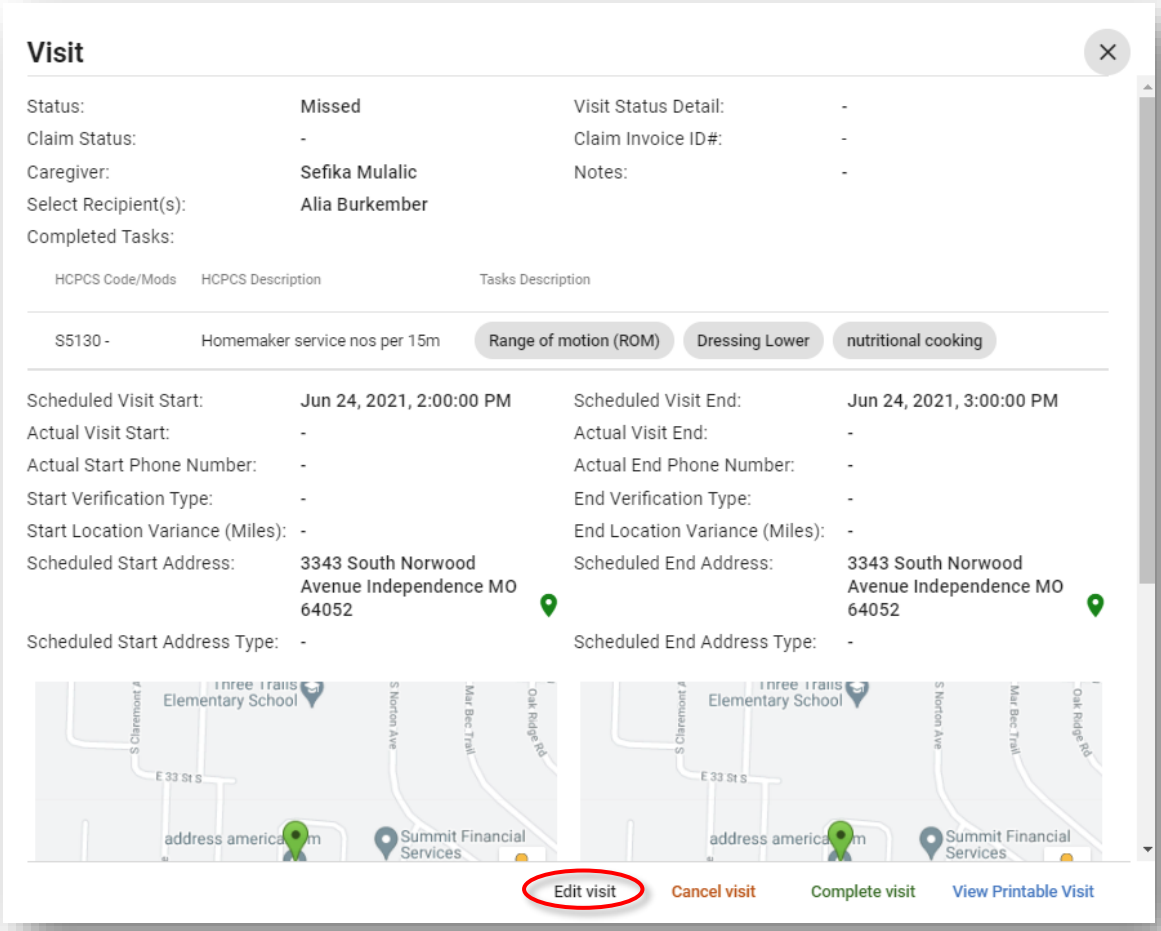
You can update a visit on the **Visit detail** page.

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

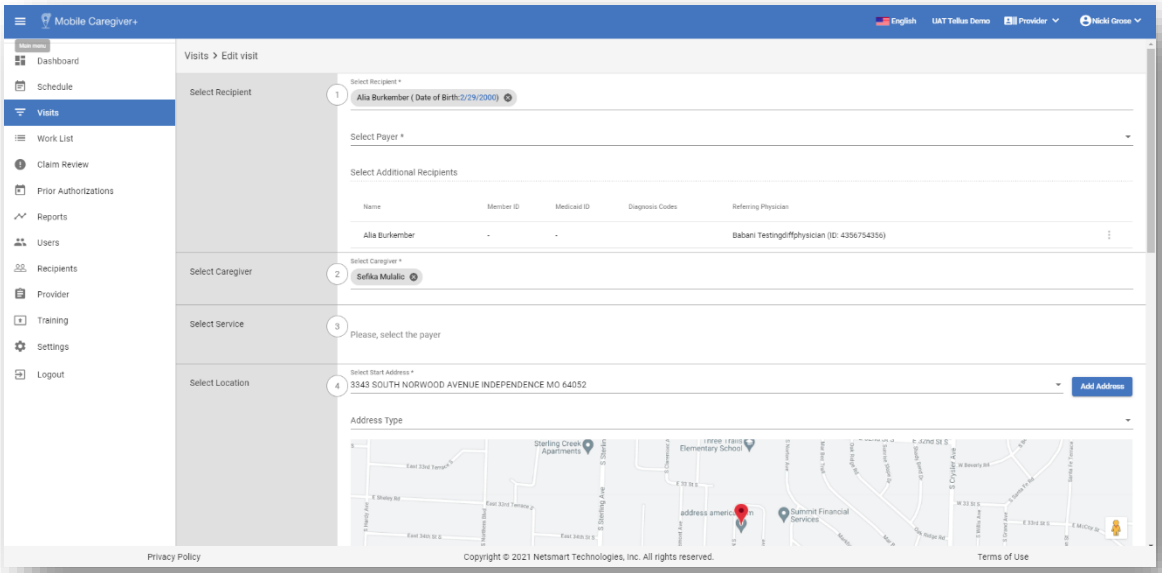
Click **Visits**.

2. *Search for the visit* you want to update.

Click the submenu icon (vertical dots) to open a page that shows visit details.



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



Make entries and selections just as you did when you *added a new visit*.

When your additions, deletions, and updates are complete, click ***Update*** to save the changes to the visit.

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

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

- ***ONLY TO THIS VISIT***: Changes will be applied to the visit date and time selected in the Select Date and Time section.
- ***THIS VISIT AND REOCCURRING AFTER***: Changes will be applied to this visit and all future visits.

The system will compare changes to other scheduled visits. If there are errors – for example, if the changes you made cause visits to overlap for a Caregiver – an error message displays and gives you two options:

- ***MAKE CORRECTIONS:*** Click this button to return to the **Edit visits** page to make additional corrections. For example, there may be a missing diagnosis, or incorrect service code. Click ***Update*** when you finish.

– ***SAVE VISIT WITHOUT CORRECTIONS:*** Save changes as you entered them, without making additional changes.

Related topics:

- *Adding or Scheduling a Visit*
- *Searching for and Viewing Visits*
- *Viewing Visit Details*
- *Completing a Visit*
- *Canceling a Missed or Late Visit*
- *Printing Visit Detail*
- *Deleting a Visit*

Printing Visit Detail

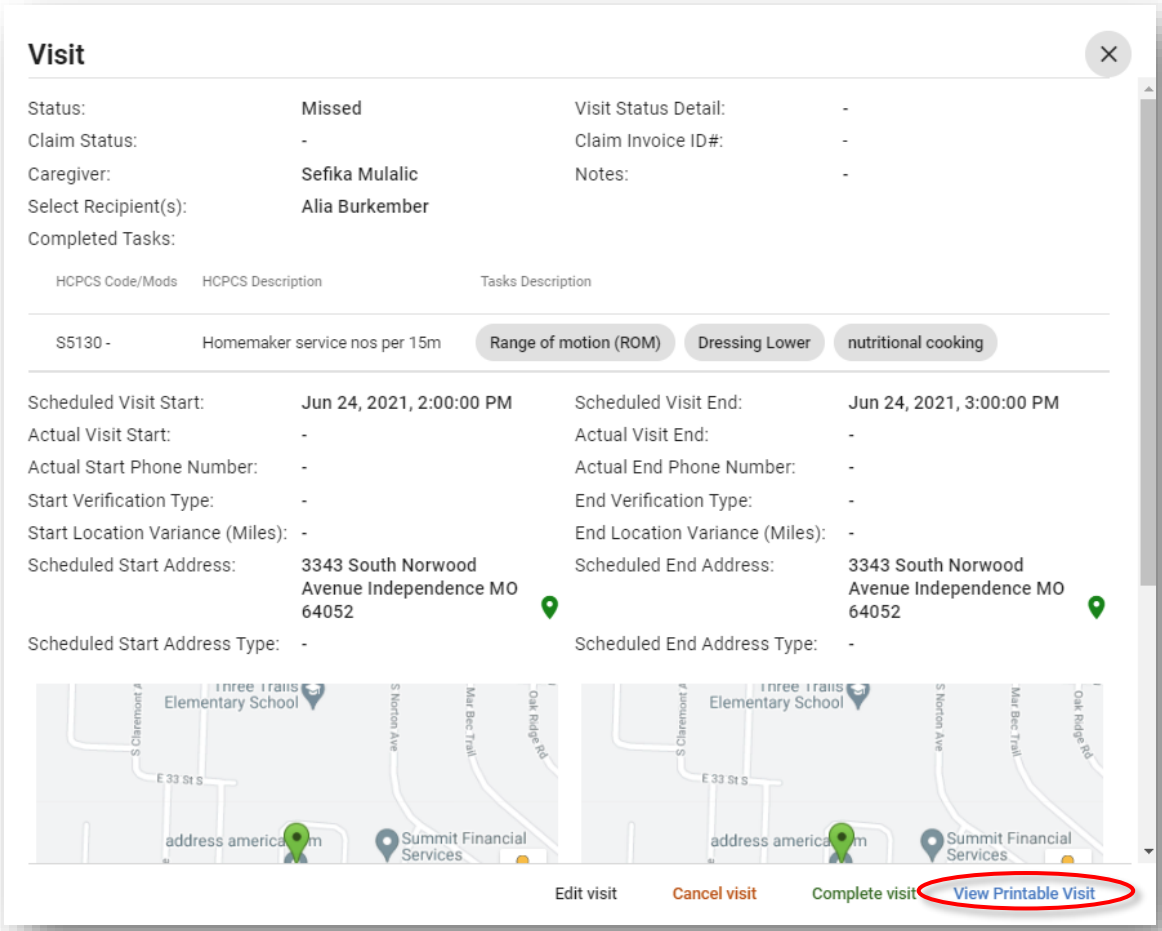
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Visits* > Printing Visit Detail

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

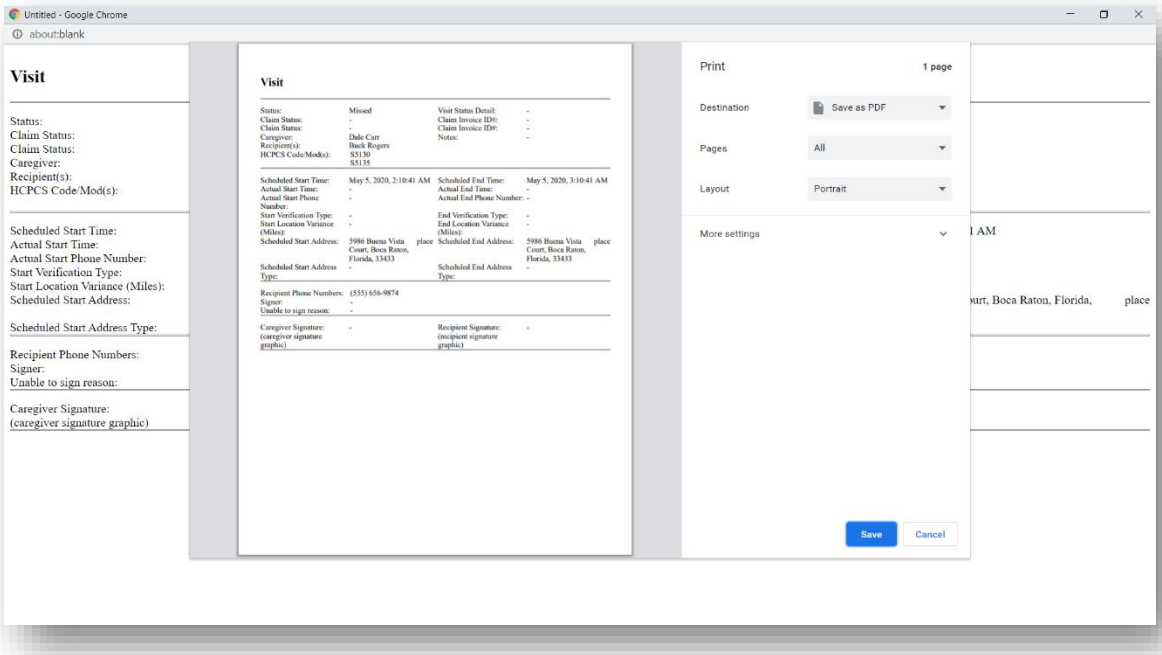
1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click **Visits**.

Find the visit you want to print.



Click ***View Printable Visit***.



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

Related topics:

- *Adding or Scheduling a Visit*
- *Searching for and Viewing Visits*
- *Viewing Visit Details*
- *Completing a Visit*
- *Canceling a Missed or Late Visit*
- *Updating a Visit*
- *Deleting a Visit*

Deleting a Visit

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Visits* > Deleting a Visit

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

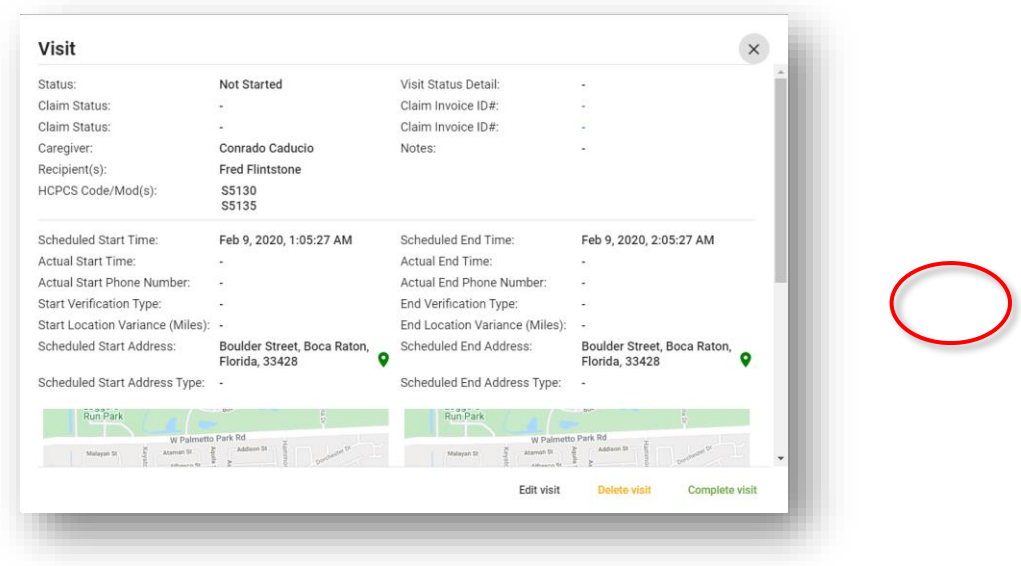
To delete a visit:

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click **Visits**.

Find the visit you want to delete.

When you see the visit that you want to delete in the search results, click the submenu icon (vertical dots) to view details about the visit.



Click ***Delete visit***.

Related topics:

- *Adding or Scheduling a Visit*
- *Searching for and Viewing Visits*
- *Viewing Visit Details*
- *Completing a Visit*
- *Canceling a Missed or Late Visit*
- *Updating a Visit*
- *Printing Visit Detail*

Managing Users

You are here: *Mobile Caregiver+ Administrator User Guide* > Managing Users

Click a topic below:

- Viewing Users
- Changing the Number of Users Displayed per Page
- Searching for a Specific User

Viewing User Detail

Adding a New User

Inviting an Existing User to your Agency

Importing a Group of New Users

- Completing the New User Spreadsheet
- Importing the New User Spreadsheet

Sending a Message to a User

Resetting User Passwords

Unlinking and Removing Users from Mobile Caregiver+ and Reassigning Tasks

Updating User Detail

Editing User Roles

Viewing Users

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > Viewing Users

In this topic you will find instructions for:

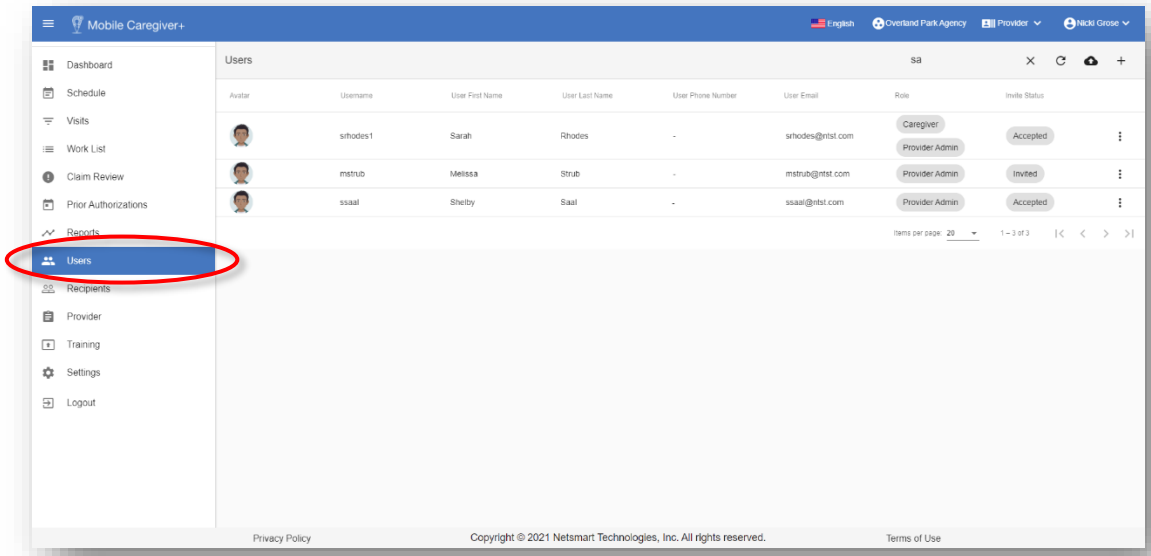
- *Viewing Users*
- *Changing the Number of Users Displayed per Page*
- *Searching for a Specific User*

Viewing Users

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > *Viewing Users* > Viewing Users

To view users:

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



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

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

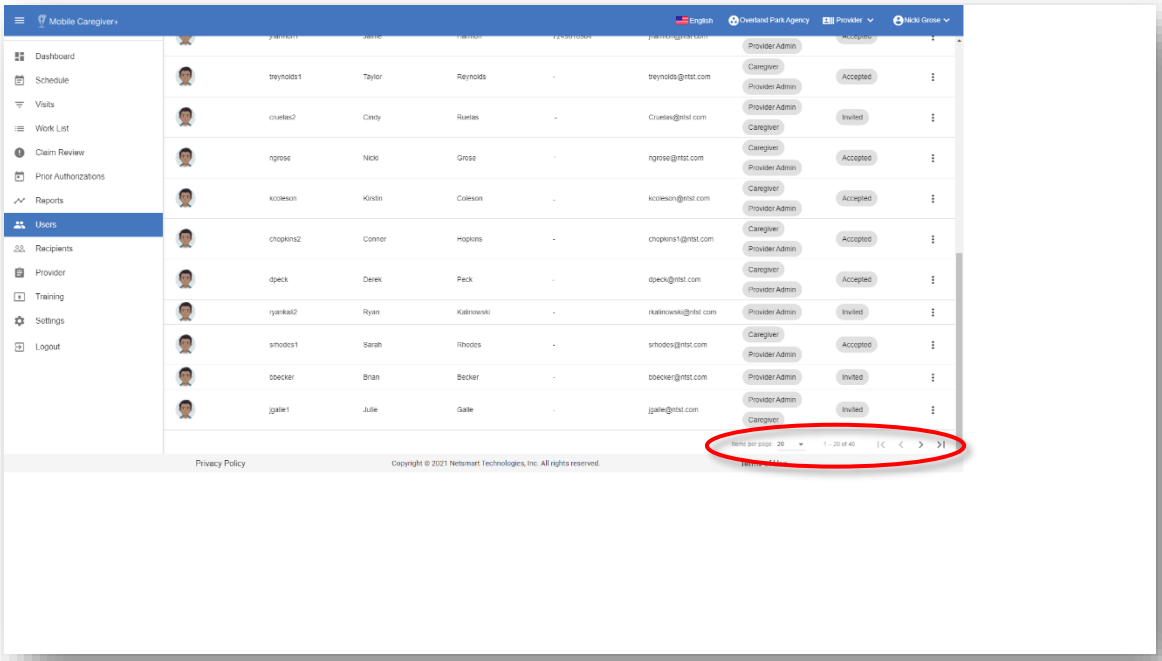
- *Edit User Roles*

Changing the Number of Users Displayed per Page

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > *Viewing Users* > Changing the Number of Users Displayed per Page

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

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



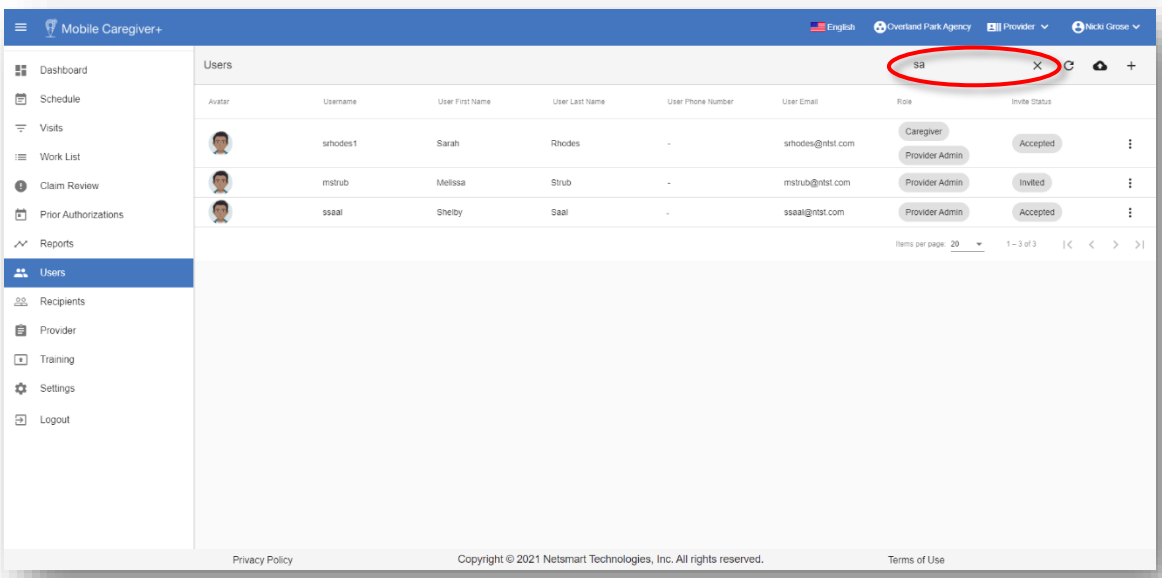
5. If the number of Users exceeds the space available on your screen, scroll to the bottom of the list. You can then click the left and right arrows at the bottom of the page to view additional Users.

Searching for a Specific User

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > *Viewing Users* > Searching for a Specific User

To search for a specific User:

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

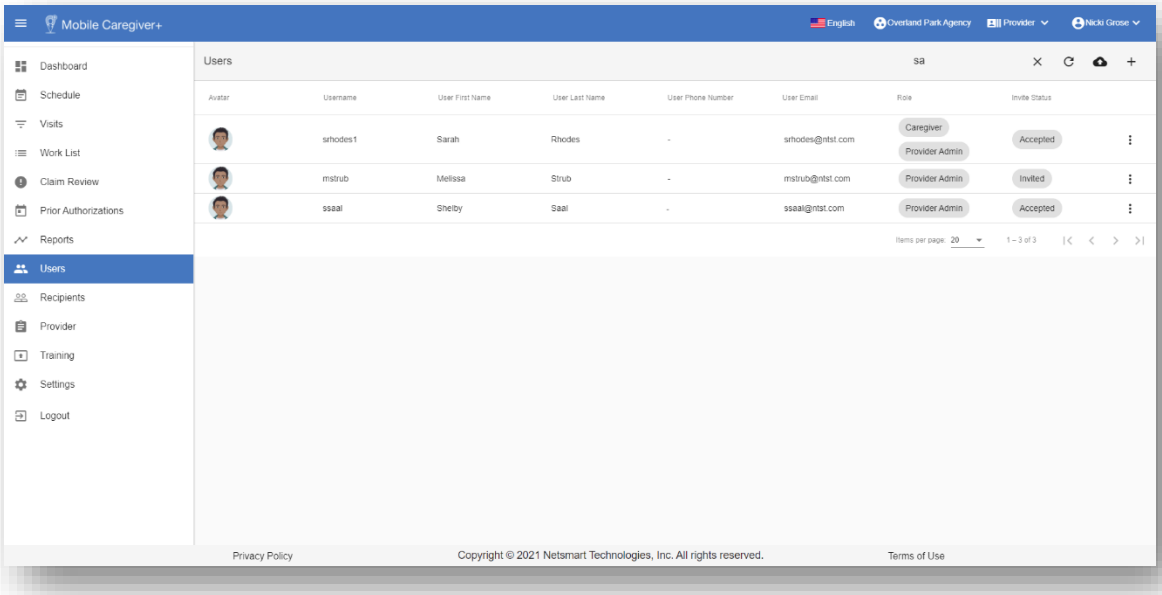


5. You can sort the results by clicking the title of the column for **Username**, **User First Name**, **User Last Name**, **Phone Number**, or **Email**; click the same column title again to reverse the order.

Related Topics

- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Updating User Detail*
- *Editing User Roles*
- *Unlinking and Removing Users from Mobile Caregiver+ and Reassigning Tasks*

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



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

Related Topics:

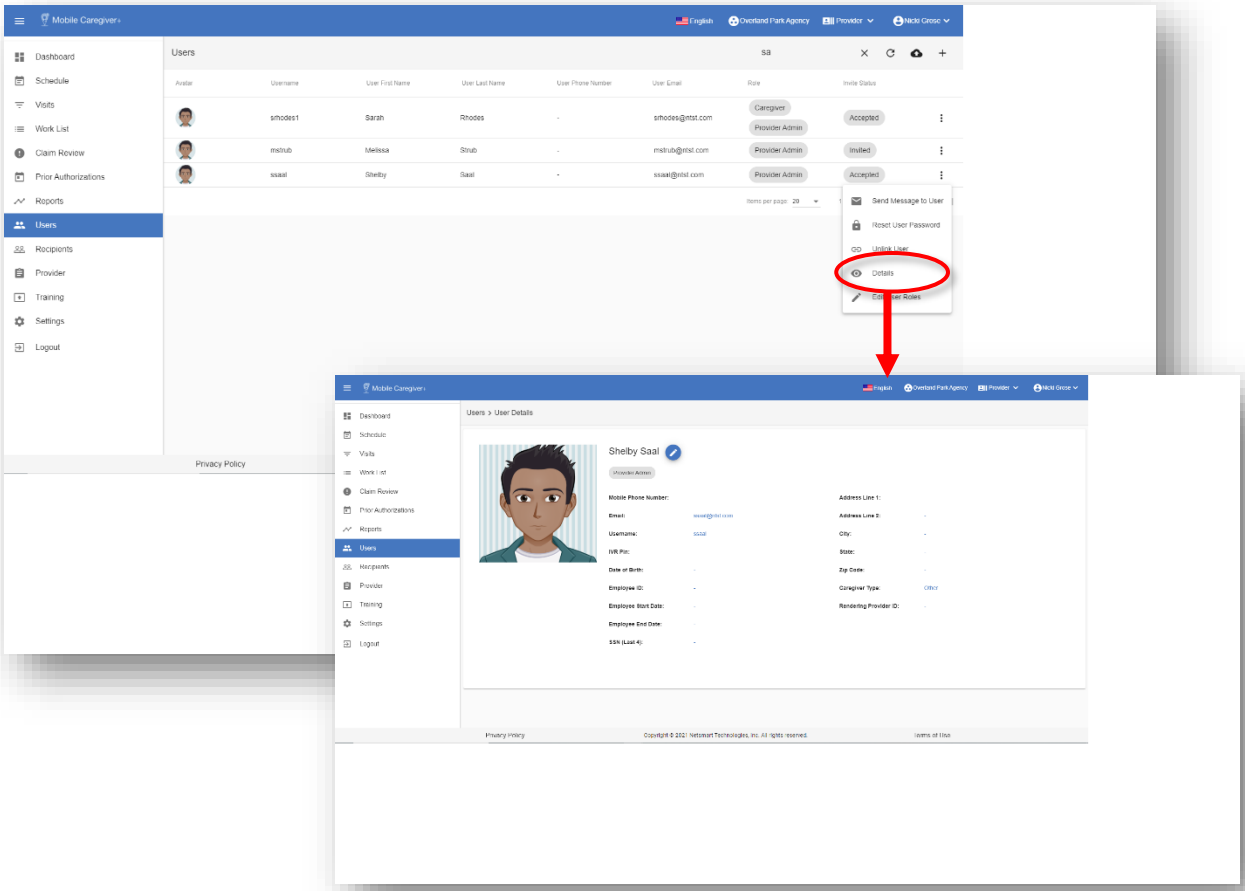
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking and Removing Users from Mobile Caregiver+ and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Viewing User Detail

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > *Viewing Users* > Searching for a User

To view detail for a specific User:

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



Related Topics:

- *Viewing Users*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking and Removing Users from Mobile Caregiver+ and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Adding a New User

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > Adding a New User

Note: Users can self-register using the Mobile Care+ app. If they have self-registered, you can invite them to your agency; if they have not you can add them following the instructions below.

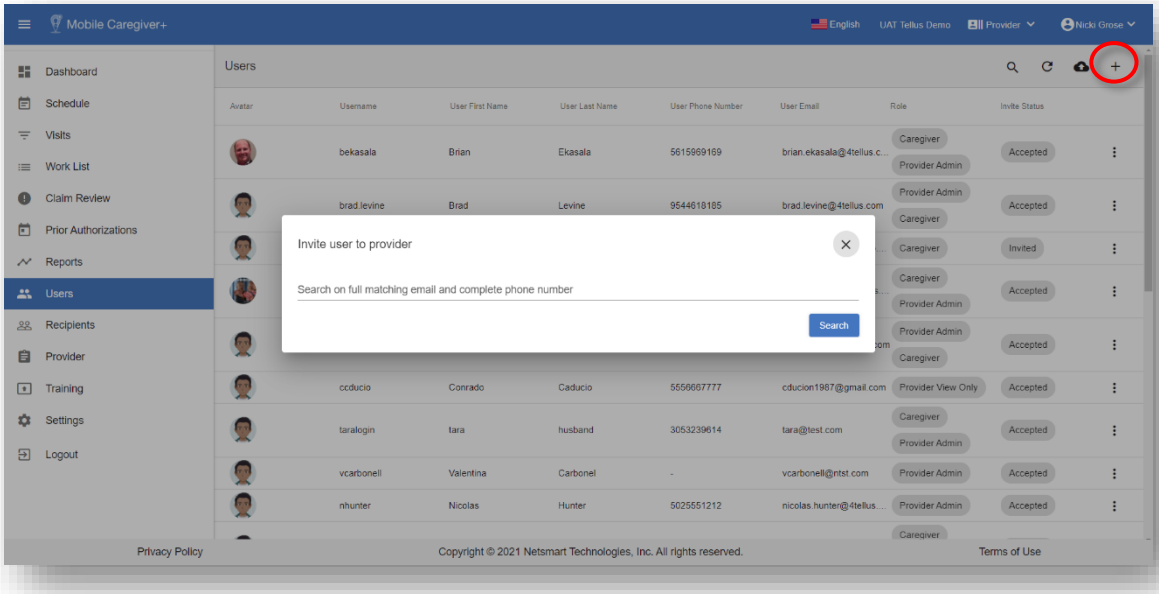
When you add a User to Mobile Caregiver+, you are "inviting" them to join your provider agency. Users can be administrators, Caregivers, or Users who have view only privileges (they should be able to view but not edit information using the Administrator Console). There are two ways to add Users: you can add individual Users, or you can *import a group of Users*.

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

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Users** option to see the Users page.

Click the "Add User" icon (plus sign) in the upper right corner of the screen to open the Invite user to provider dialogue box.

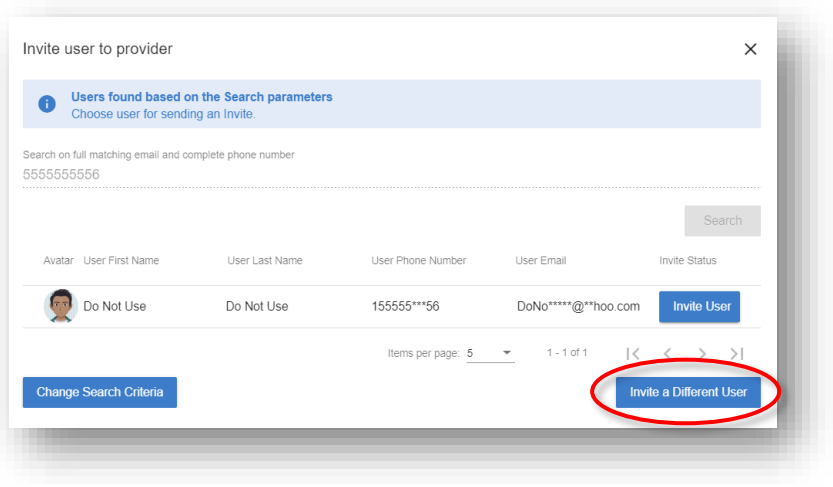


You must search for an existing User, even if you know the User is not in the system and invite them to join your organization. To do so enter a User email address or phone number.

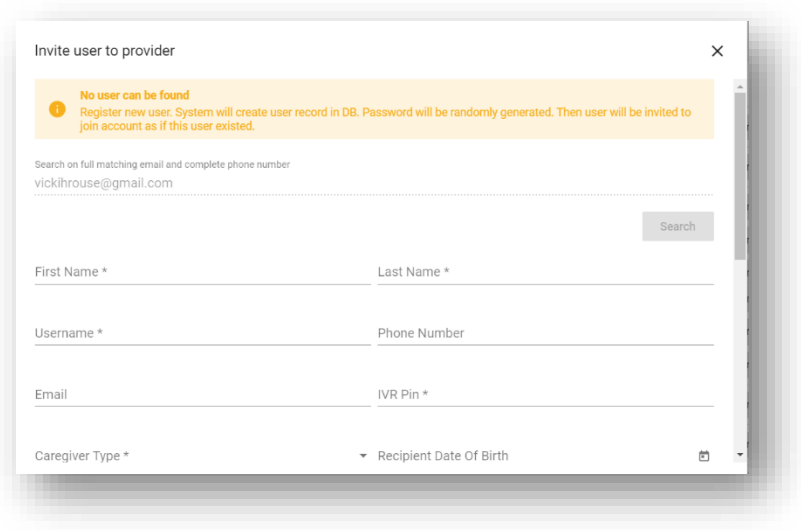
Click ***Search***.

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

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



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



Make the following required entries:

- **First name:** Enter the new User's first name.
- **Last name:** Enter the new User's last name.
- **Username:** Enter the new User's preferred Username. This is Username that will be used to log into Mobile Caregiver+.
- **Mobile Phone Number** (required if you do not enter an **Email** address)**:** Enter the new User's phone number. This can also be used for notification and password reset purposes. Only numeric characters can be entered; i.e., 0-9. It is not necessary to add parentheses or hyphens; the phone number is formatted automatically as numbers are entered.
- **Email** (required if you do not enter **Mobile Phone Number**)**:** Enter the new User's valid email address. This can be used for notification and password reset purposes.
- **Caregiver Type**: If you are setting up a Caregiver, select the type of Caregiver they are. Use the dropdown list to see available types; you can select only one.
- **Rendering Provider ID**: If you are setting up a Caregiver, enter the 9-digit Medicaid ID for the Caregiver. You must enter a Rendering Provider ID or you will need to enter it for every visit you schedule for this Caregiver.
- **Roles**: Use the dropdown list to see available roles and then check one or more of the following:
    - **Admin** — This role allows the User to view and edit information in the Administrator Console. There is no need to select any other role; Administrators have access to everything in the system.

- **Billing** — This role allows the User to access Claims functions only: Visits, Work List, Claim Review, and Prior Authorizations. This role can be combined with any other role, except Monitor.
- **Caregiver** — This role allows the User to view only the information and schedules for the Recipients for whom they provide care. If a User is assigned the Caregiver *only*, that User will only have access to information on their Mobile Care+ app; they will not have access to the Administrator Console.
- **Monitor** — This role allows the User to only view information. Users assigned the Monitor role cannot make any changes using the Administrator Console. This role can be combined with Caregiver only.

Complete other fields if you know the information; you can always come back and *Edit User Details*.

Click ***Invite New User*** to add the new User.

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

An email will be sent to the User to join Mobile Caregiver+ system. The user will have 36 hours to activate the invite before expiring.

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

Related Topics:

- *Viewing Users*
- *Viewing User Detail*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking and Removing Users from Mobile Caregiver+ and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Inviting an Existing User to your Agency

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > Inviting an Existing User to your Agency

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

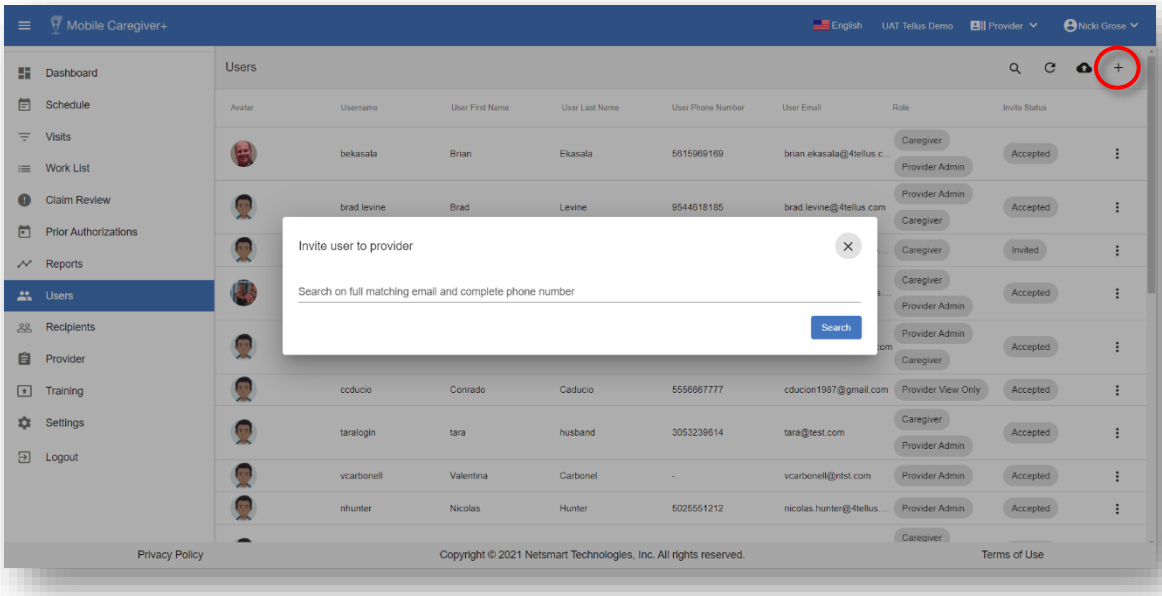
If a user works for more than one agency and that User already exists in Mobile Caregiver+, you can "invite" them to join your agency.

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

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Users** option to see the Users page.

Click the "Add User" icon (+) in the upper right corner of the screen to open the Invite user to provider dialogue box.

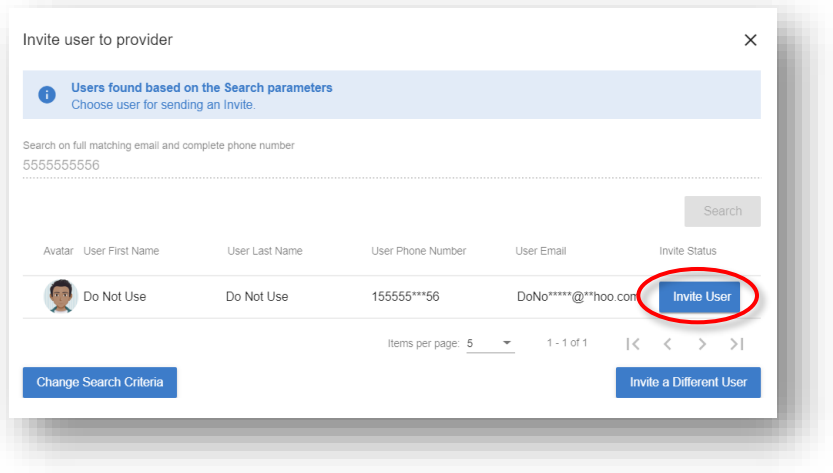


You must search for an existing User, even if you know the User is not in the system, and invite them to join your organization. To do so enter a User email address or phone number.

Click ***Search***.

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

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



Click ***Invite User***.

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

Related Topics:

- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking and Removing Users from Mobile Caregiver+ and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Importing a Group of New Users

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > Importing a Group of New Users

You can use the User Upload Template Excel (.csv format) spreadsheet to import a group of Users into Mobile Caregiver+. To do so you will *complete* and *import* the spreadsheet; instructions follow. Please contact Netsmart to request the CSV User Upload Template

Completing the New User Spreadsheet

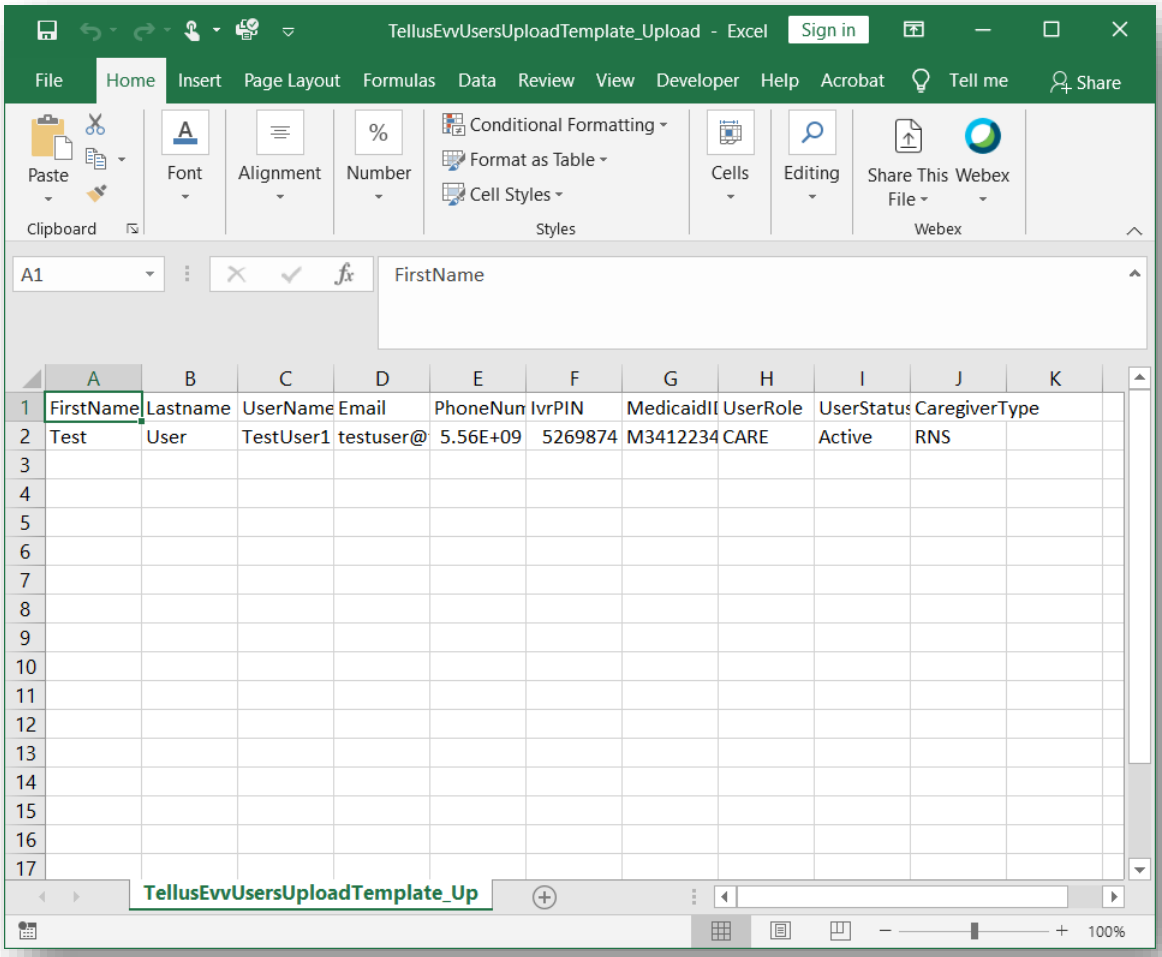
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > *Importing a Group of New Users* > Completing the New User Spreadsheet

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

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

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

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



Importing the New User Spreadsheet

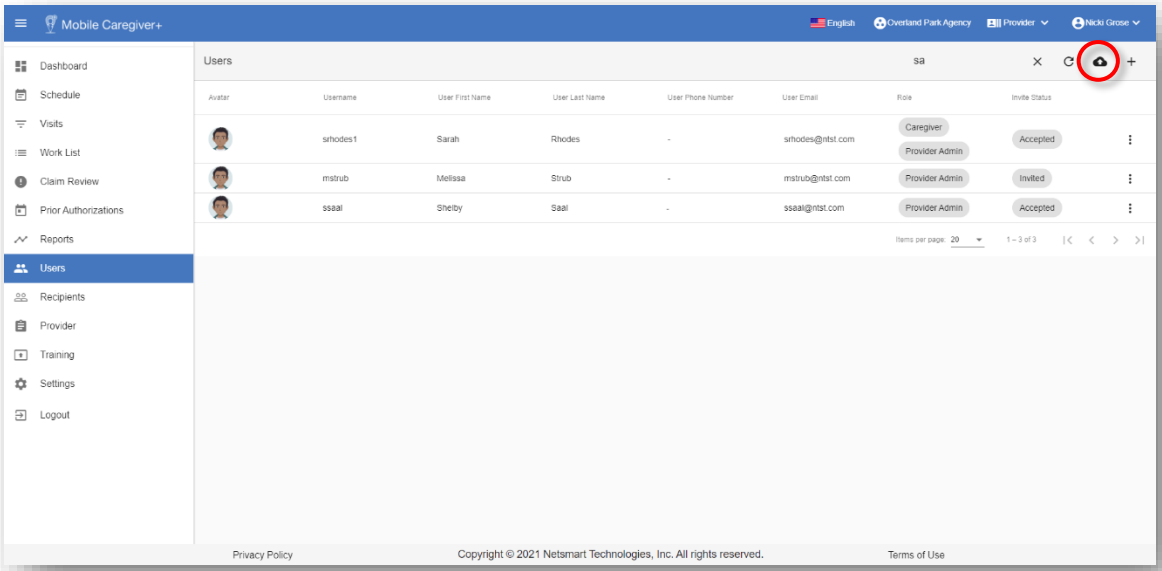
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > *Importing a Group of New Users* > Importing the New User Spreadsheet

To import the spreadsheet:

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Users** option to see the **Users** page

Click the “cloud” icon in the upper right corner of the page.


Mobile Caregiver+
English
Overland Park Agency
Provider
Nicki Grose
Dashboard
Schedule
Visits
Work List
Claim Review
Prior Authorizations
Reports
Users
Recipients
Provider
Training
Settings
Logout
Users
sa
Avatar
Username
User First Name
User Last Name
User Phone Number
User Email
Role
Invite Status
srhodes1
Sarah
Rhodes
srhodes@ntst.com
Caregiver
Provider Admin
Accepted
mstrub
Melissa
Strub
mstrub@ntst.com
Provider Admin
Invited
ssaal
Shelby
Saal
ssaal@ntst.com
Provider Admin
Accepted
Items per page: 20
1 – 3 of 3
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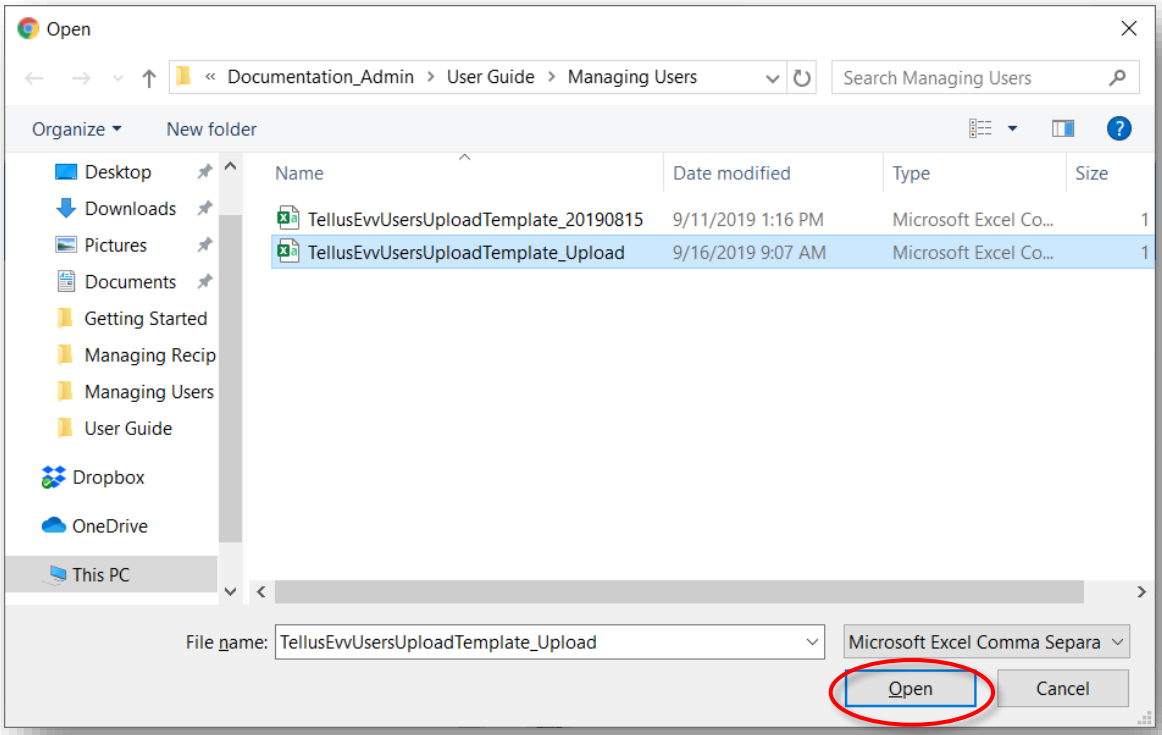
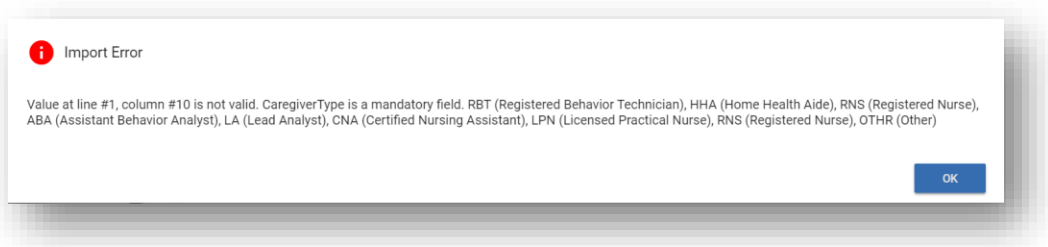
Terms of Use

Find and select the file you want to upload.

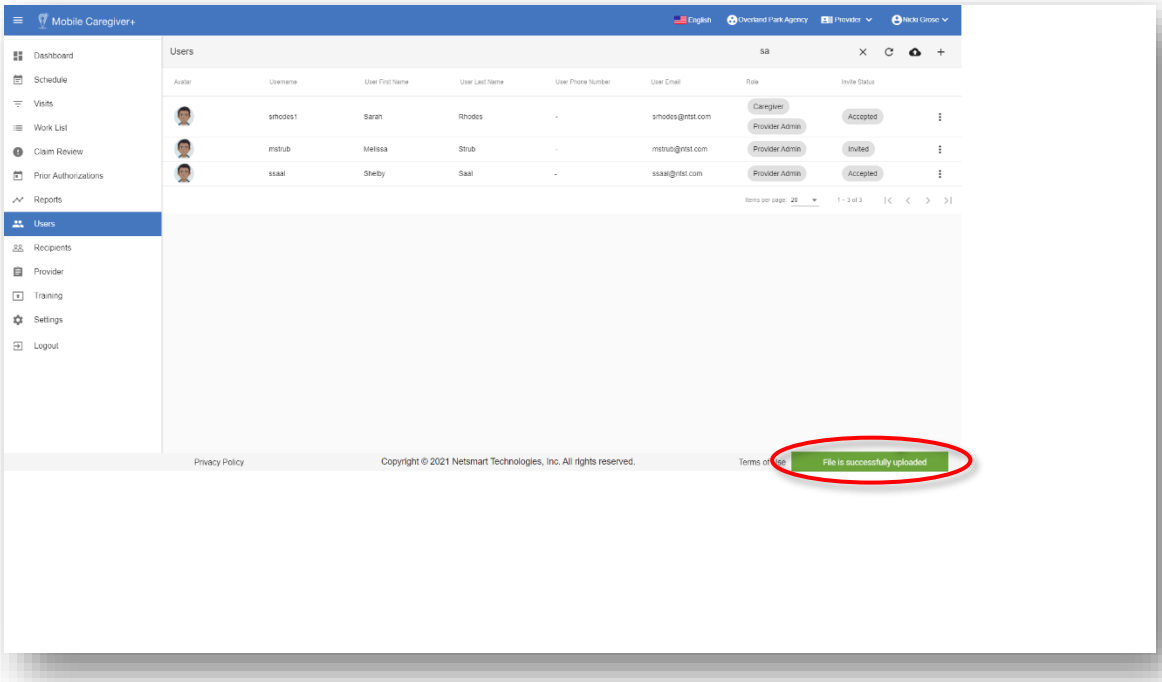


Click ***Open***.

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



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



Related Topics:

- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking and Removing Users from Mobile Caregiver+ and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Sending a Message to a User

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > Sending a Message to a User

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

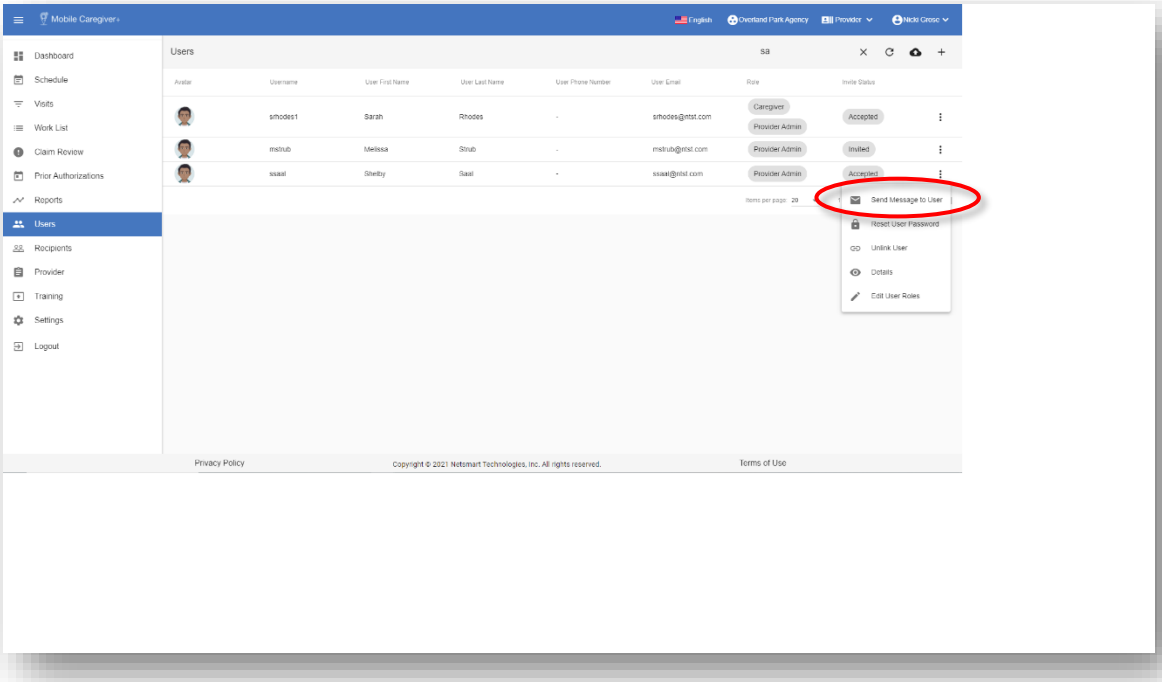
1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Users** option to see the Users page.

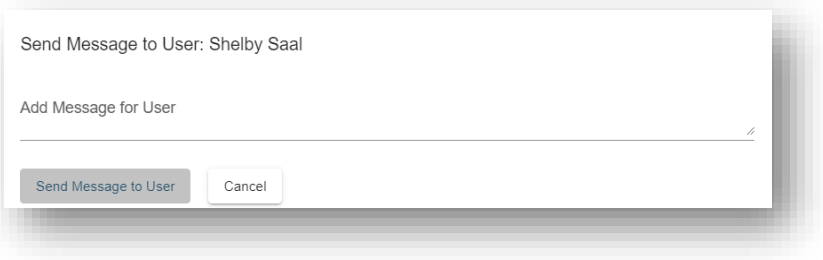
Find the User you want to send the message to.

Click the submenu icon (vertical dots) on the far right for the User you want to send the message to.

Select ***Send Message***.



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



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

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

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

Related Topics:

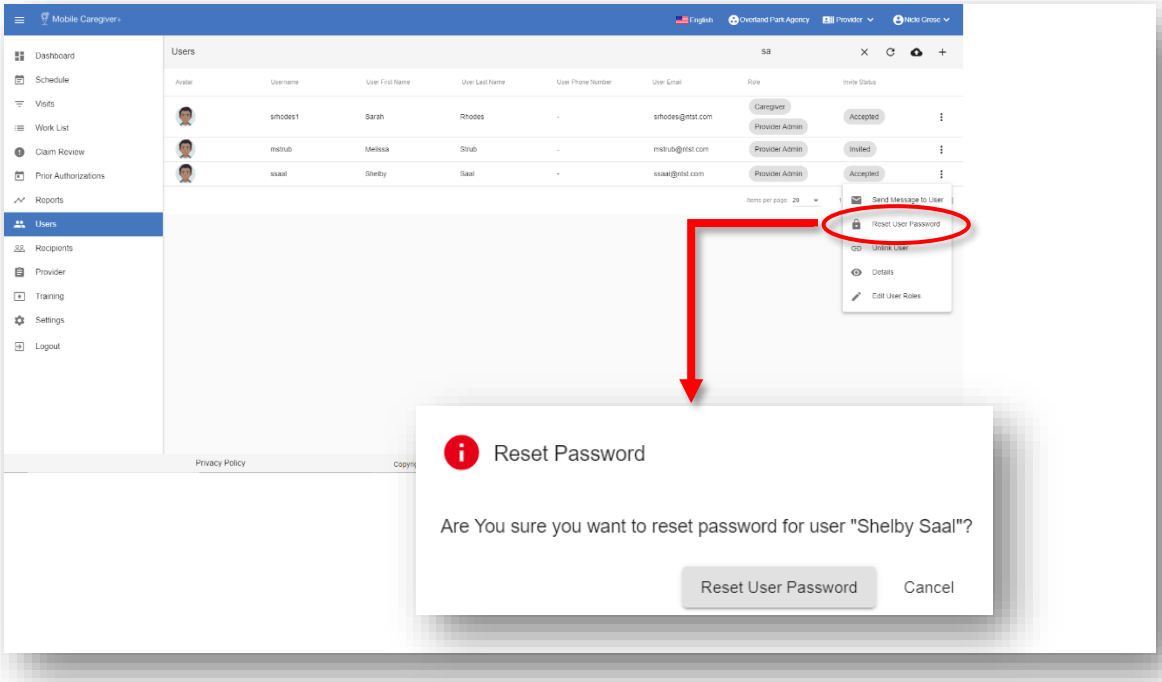
- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Resetting User Passwords*
- *Unlinking and Removing Users from Mobile Caregiver+ and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Resetting User Passwords

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > Resetting User Passwords

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

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



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

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

Related Topics:

- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Unlinking and Removing Users from Mobile Caregiver+ and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Unlinking and Removing Users from Mobile Caregiver+ and Reassigning Tasks

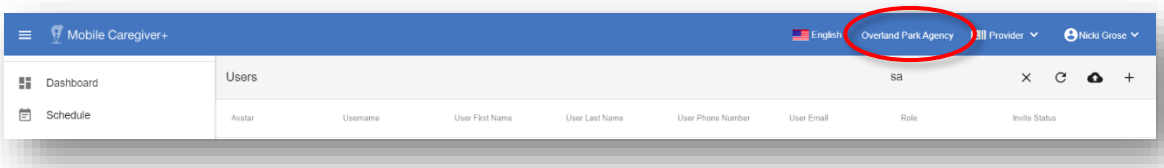
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > Unlinking and Removing Users from Mobile Caregiver+ and Reassigning Tasks

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

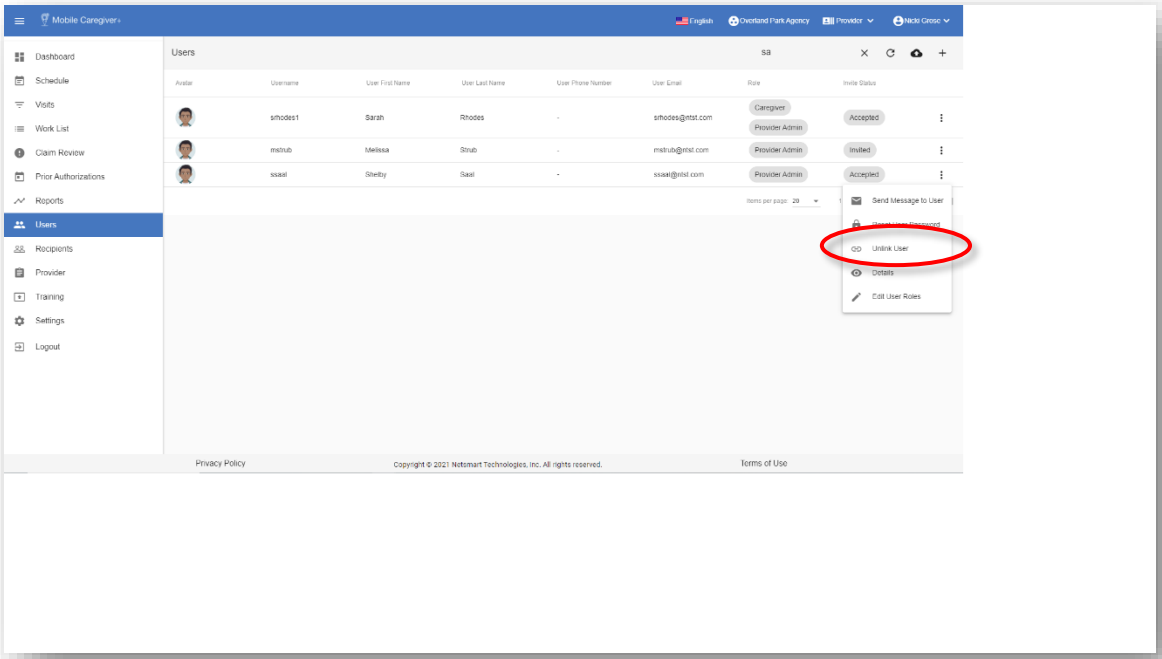
Note: Administrators cannot unlink/remove themselves; removing a User with the role Admin must be done by a different Administrator.

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

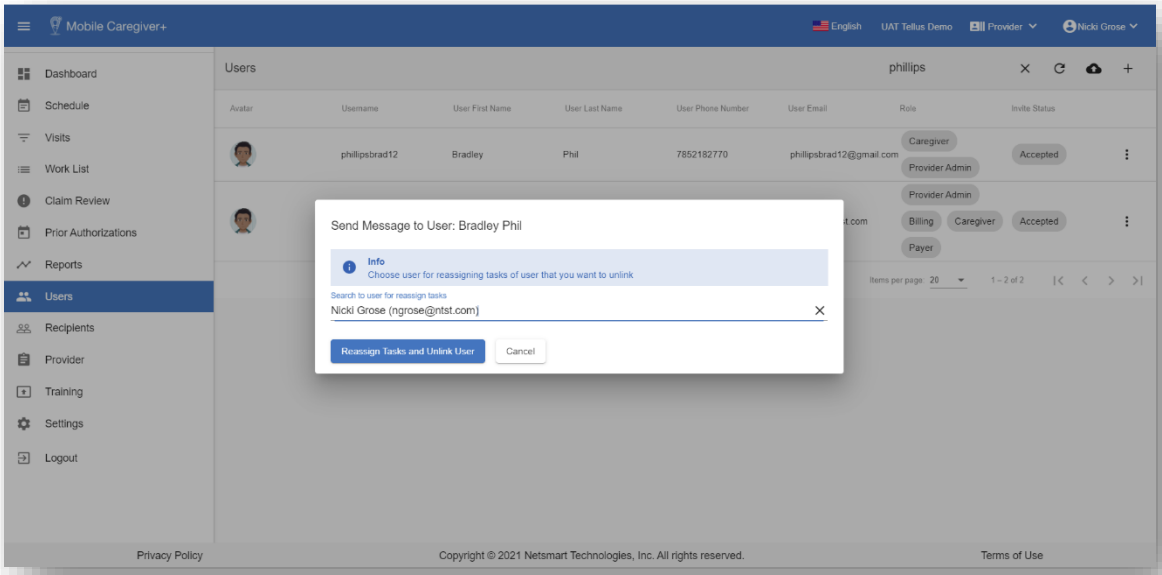
1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).
2. Click the Users option to see the Users page.
3. If your agency has multiple locations, click your agency name in the banner and select the correct location.



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



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



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

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

Related Topics:

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

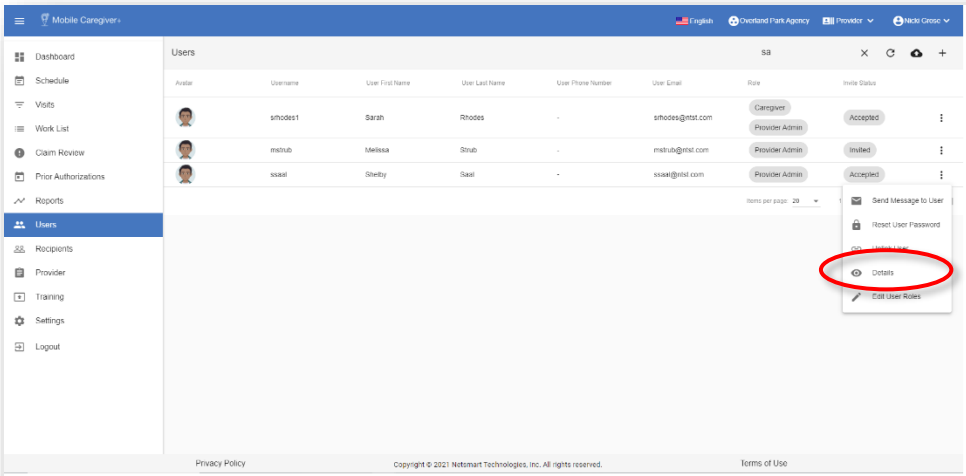
Updating User Detail

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > Updating User Detail

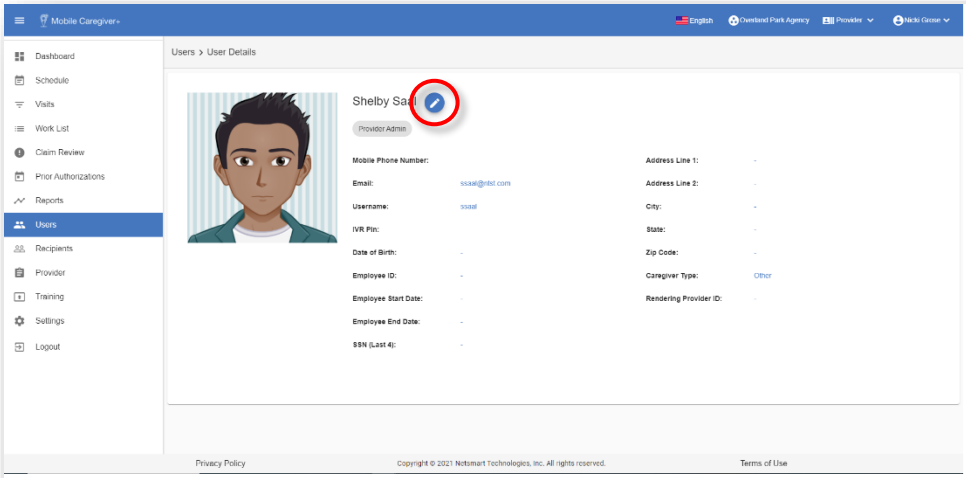
You can update User from the **Users** page.

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

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

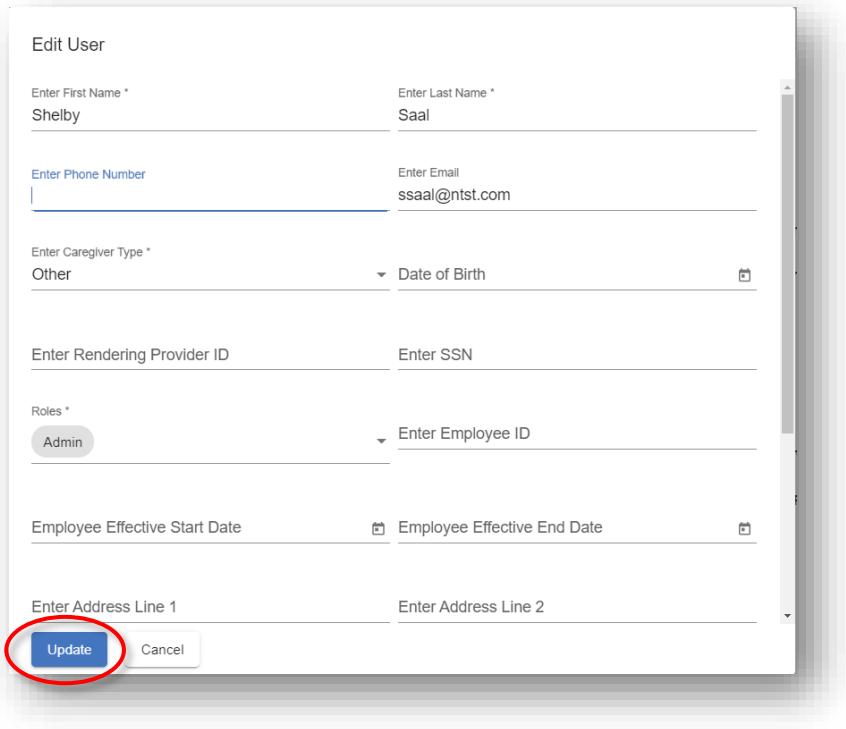


6. When the User Detail screen opens, click the “pencil” icon to open the fields for editing.



Make entries and changes as needed. Scroll down to see additional fields.

Click ***Update***.



Related Topics:

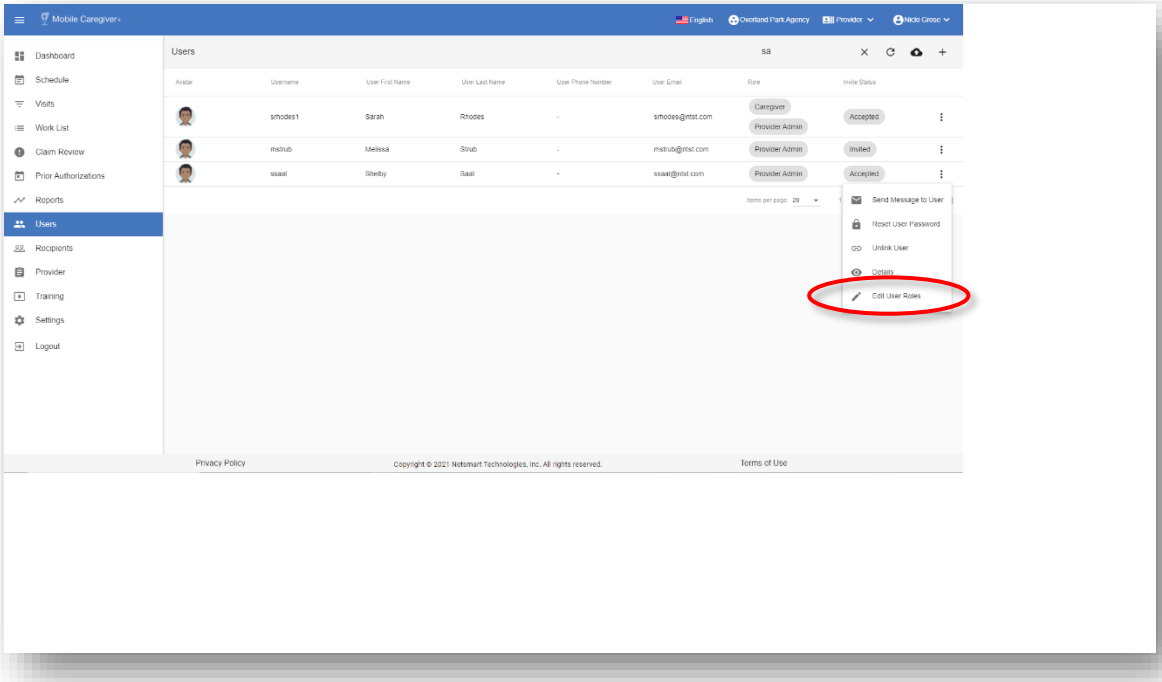
- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Editing User Roles*

Editing User Roles

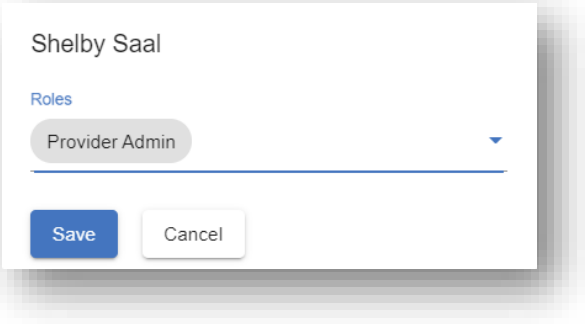
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Users* > Editing User Roles

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

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

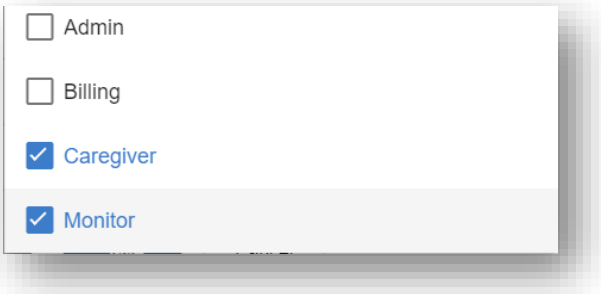


6. When the pop-up dialogue opens, use the drop-down menu to see available roles.



7. Add (check) or remove (uncheck) roles that are appropriate for the User. You can select more than one role for a User. The choices are:

- **Admin** — This role allows the User to view and edit information in the Administrator Console. There is no need to select any other role; Administrators have access to everything in the system.
- **Billing** — This role allows the User to access Claims functions only: Visits, Work List, Claim Review, and Prior Authorizations. This role can be combined with any other role, except Monitor.
- **Caregiver** — This role allows the User to view only the information and schedules for the Recipients for whom they provide care. If a User is assigned the Caregiver only, that User will only have access to information on their Netsmart Mobile Care+ app; they will not have access to the Administrator Console.
- **Monitor** — This role allows the User to only view information. Users assigned the Monitor role cannot make any changes using the Administrator Console. This role can be combined with Caregiver only.



8. Click ***Save***.

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

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

Related Topics:

- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking and Removing Users from Mobile Caregiver+ and Reassigning Tasks*
- *Updating User Detail*

Managing Recipients

You are here: *Mobile Caregiver+ Administrator User Guide* > Managing Recipients

Click a topic below:

- Searching for and Viewing Recipients
  - Viewing Recipients
  - Changing the Number of Recipients Displayed Per Page
  - Searching for a Specific Recipient
- Adding a New Recipient
  - Adding a Recipient: Entries
    - Adding Recipient Information
    - Entering Emergency Contact Information
    - Entering a Recipient Address
    - Entering Payer Subscription Information
- Importing a Group of New Recipients
  - Completing the Spreadsheet
  - Importing the Spreadsheet
- Editing a Recipient
  - Updating General Recipient Information
  - Updating Addresses
    - Updating an Address
    - Adding a New Address
    - Setting an Address as Primary
    - Deleting an Address
  - Updating Payer Subscriptions
    - Adding a New Payer
    - Deleting a Payer
  - Entering Notes
  - Entering a Referring Physician
- Uploading Documents for a Recipient
  - Managing Uploaded Document

Deactivating a Recipient

Activating an Inactive Recipient

Searching for and Viewing Recipients

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > Searching for and Viewing Recipients

In this topic you will find instructions for:

- *Viewing Recipients*
- *Changing the Number of Recipients Displayed per Page*
- *Searching for a Specific Recipient*

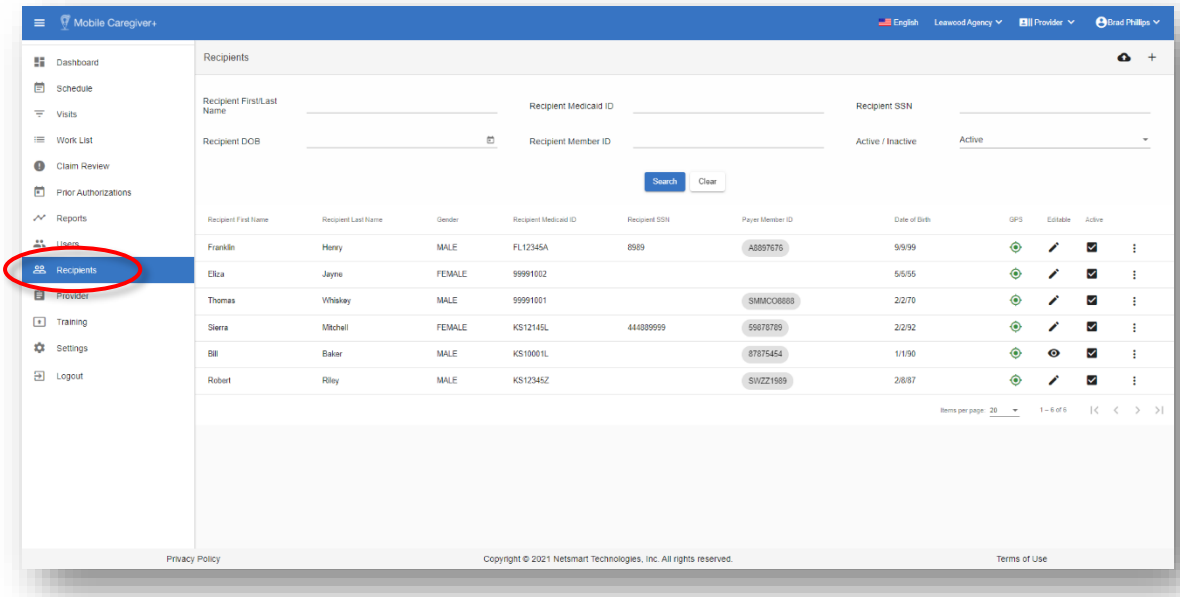
Viewing Recipients

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Searching for and Viewing Recipients* > Viewing Recipients

To view recipients:

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the Recipients option.



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

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

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

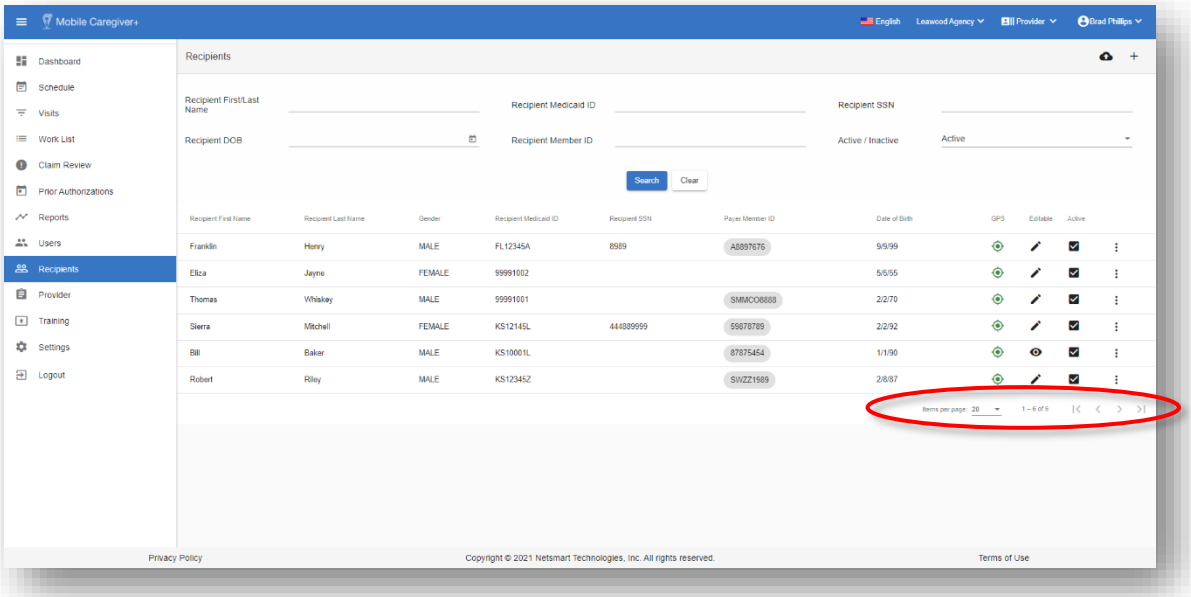
Changing the Number of Recipients Displayed Per Page

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Searching for a viewing Recipients* > Changing the Number of Recipients Displayed Per Page

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

1. Scroll to the bottom of the page.

Click the **Items per page** dropdown arrow and make a selection*:* 20, 50 or 100 Recipients per page.



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

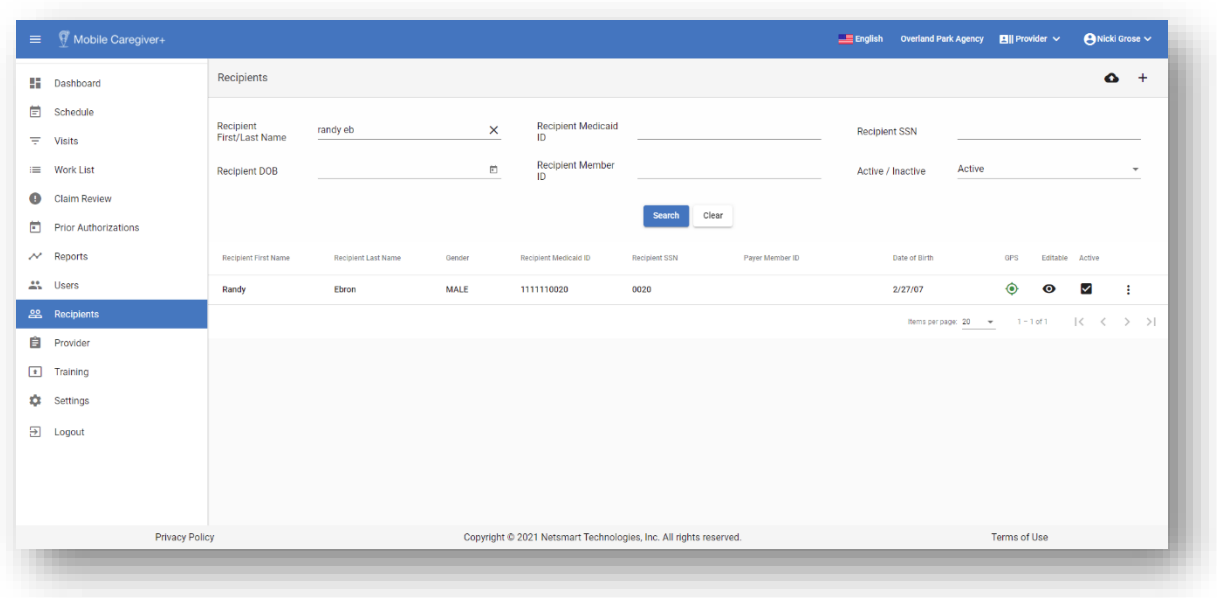
Searching for a Specific Recipient

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Searching for a viewing Recipients* > Searching for a Specific Recipient

To search for a specific Recipient:

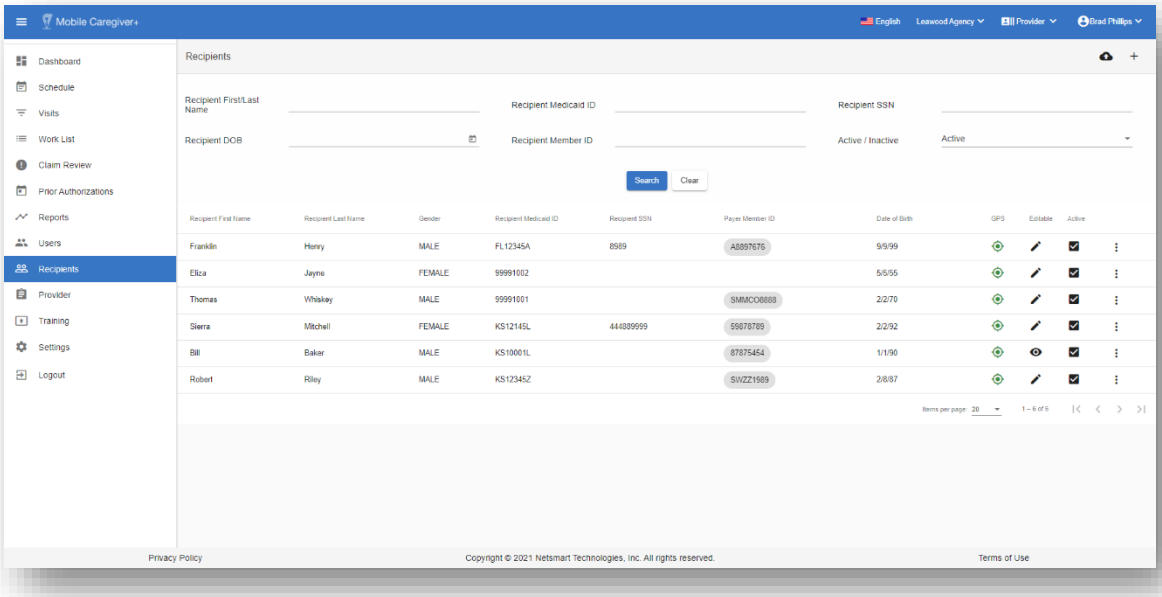
1. Make an entry in any or all of the fields at the top of the page – **Recipient Name/Last Name**, **Recipient Medicaid ID**, **Recipient DOB**, **Recipient Member ID,** and/or **Active/Inactive** – to narrow the list of Recipients displayed and then click ***Search***.

   Click "X" in any field to remove the search criteria.



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

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



Related Topics

- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Adding a New Recipient

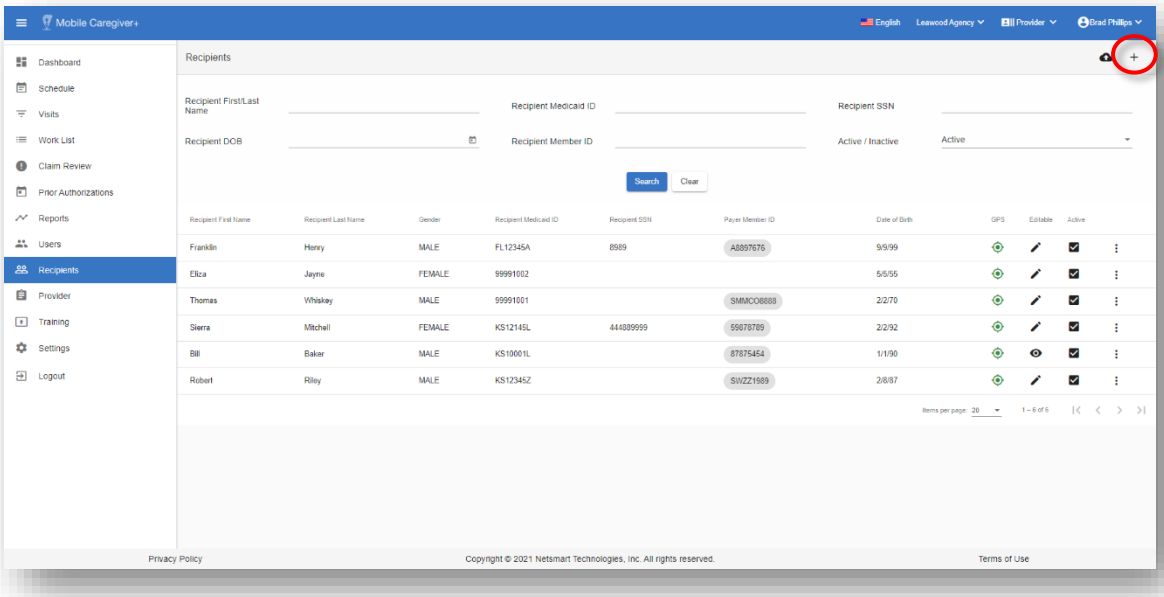
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > Adding a New Recipient

Recipients are the people to whom your Caregivers will provide services. There are two ways to add Recipients: you can add individual Recipients or you can *import a group of Recipients*.

Note: When you add Recipients to the Mobile Caregiver+ system they automatically have the status Active; you can inactivate Recipients that you no longer provide services for, who are no longer eligible for services, or who were entered under the wrong agency. See Deactivating a Recipient.

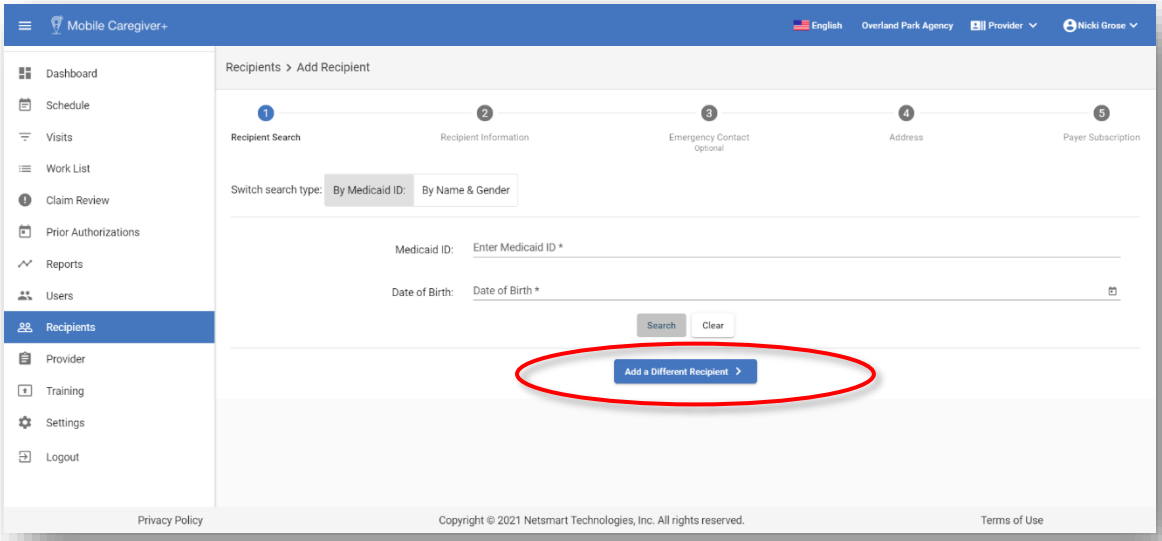
To add an individual Recipient, follow these steps:

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

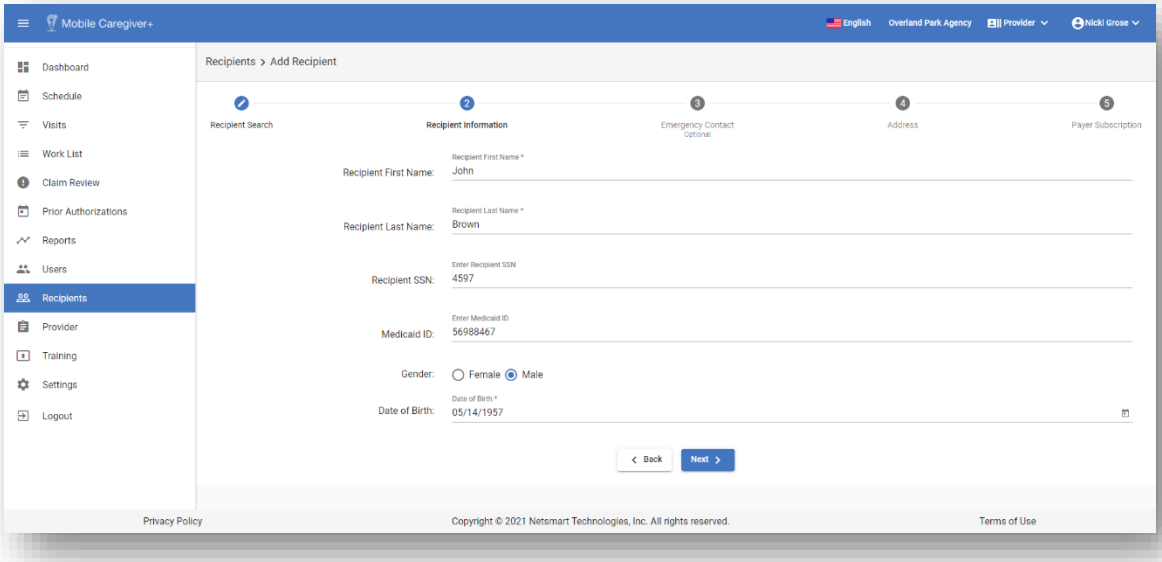


OPTIONAL: When the Recipient Search window opens search to see if the Recipient exists in the system.

- Click **By Medicaid ID** to search by Medicaid ID and date of birth.
- Click **By Name & Gender** to search by name and date of birth.



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



Complete the information following the numbered steps on the screen. Instructions follow in *Adding a Recipient: Entries*.

Click ***Save*** when you finish making your entries.

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

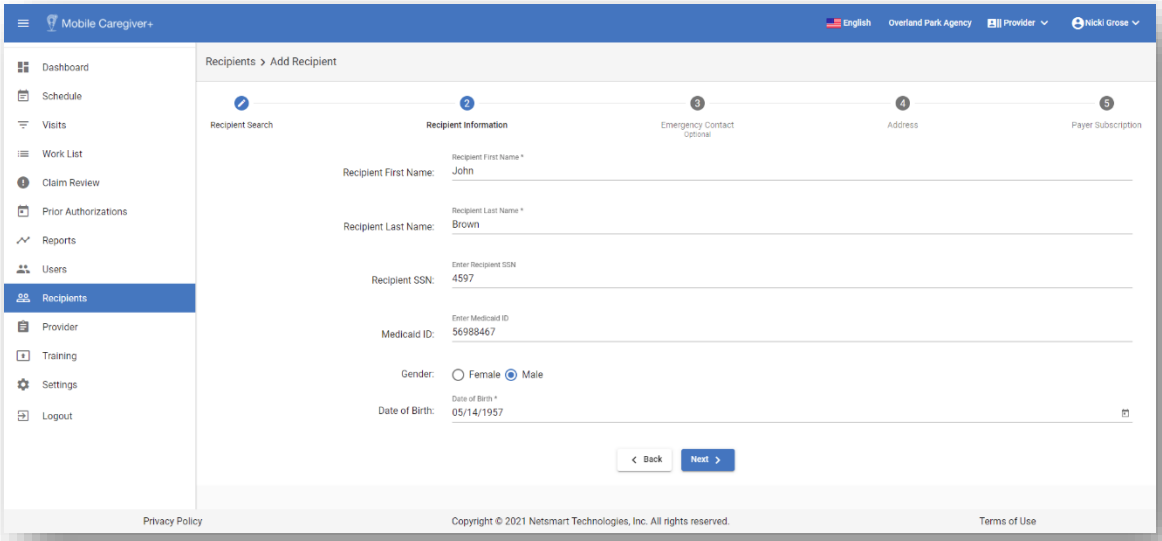
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Adding a New Recipient* > Adding a Recipient: Entries

Adding Recipient Information

1. Complete all required fields (as noted by an *****) and as many of the optional fields as possible. You will need to scroll down to see all fields.

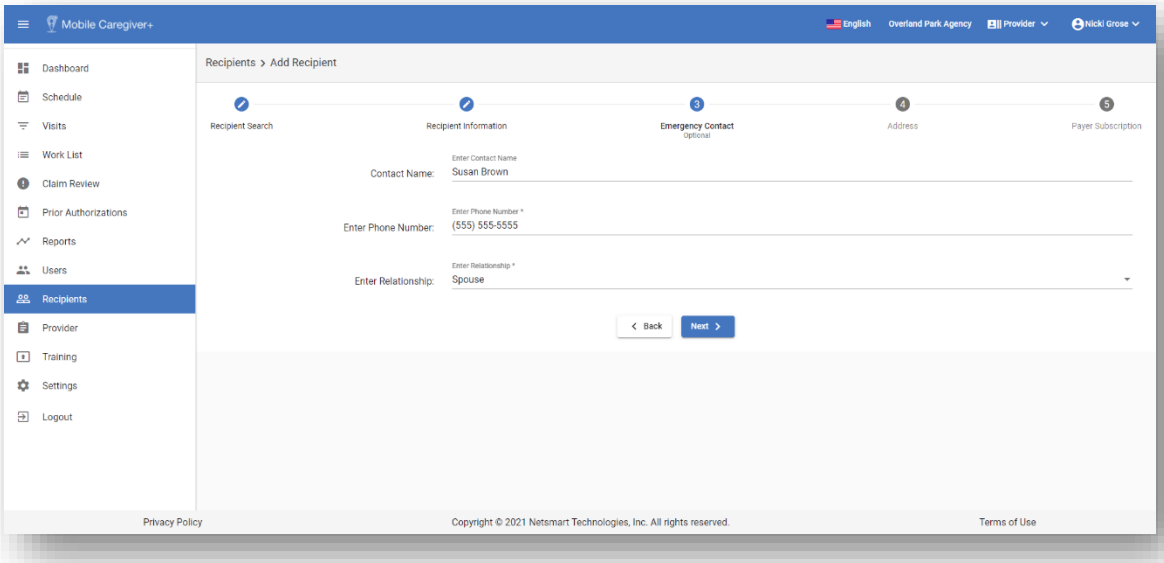
- **Recipient First name*:** Enter the new Recipient's first name.
- **Recipient Last name*:** Enter the new Recipient's last name.
- **SSN (Last 4):** Enter the last 4 digits of the new Recipient's social security number.
- **Gender:** Select the gender using the radio buttons. The default selection is male.
- **Date of Birth*:** Enter the new Recipient's date of birth by typing the date by clicking the *calendar icon* and selecting a date from the calendar.

2. Click ***Next*** to move to the next step: Emergency Contact Information.



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

Entering Emergency Contact Information



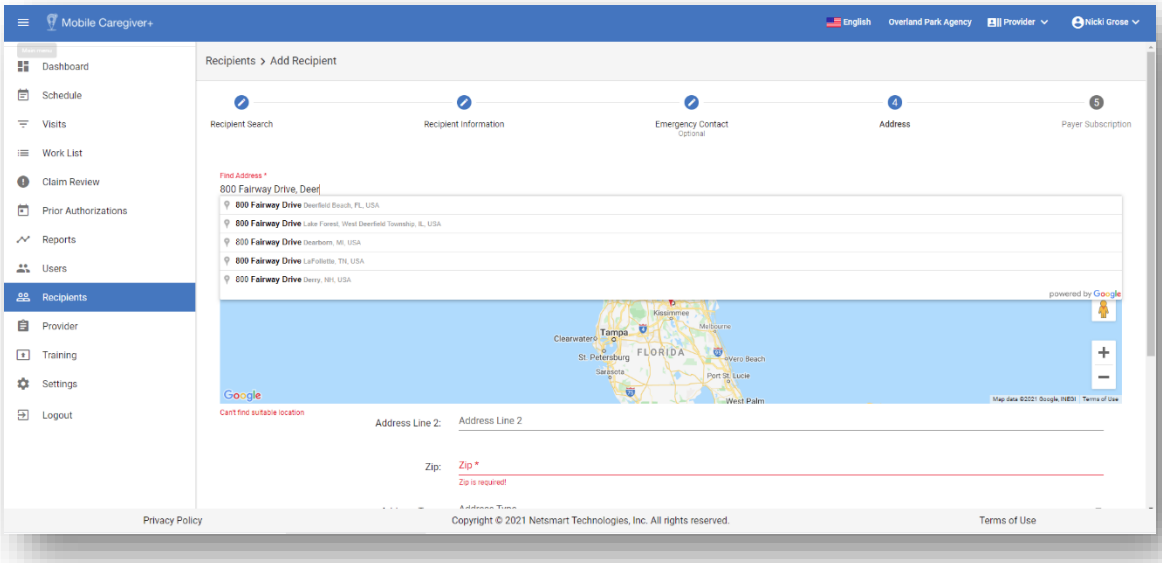
1. Enter the following contact information.

- **Contact Name:** Enter an Emergency Contact Name for the Recipient.
- **Enter Phone Number:** Enter the Emergency Contact's Phone Number.
- **Enter Relationship:** Use the dropdown list to select the Emergency Contact's relationship to the Recipient. Choose **None**, **Child**, **Friend**, **Other**, **Parent**, **Sibling**, **Spouse,** or **Unknown**.

Click ***Next*** to move to the next step: **Address**.

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

Entering a Recipient Address



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

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

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

   If your agency uses IVR instead of the Netsmart Mobile Care+ app, check the **IVR Phone Number** box.
4. If the Recipient has an alternate phone number, enter it in the **Secondary Phone** field.

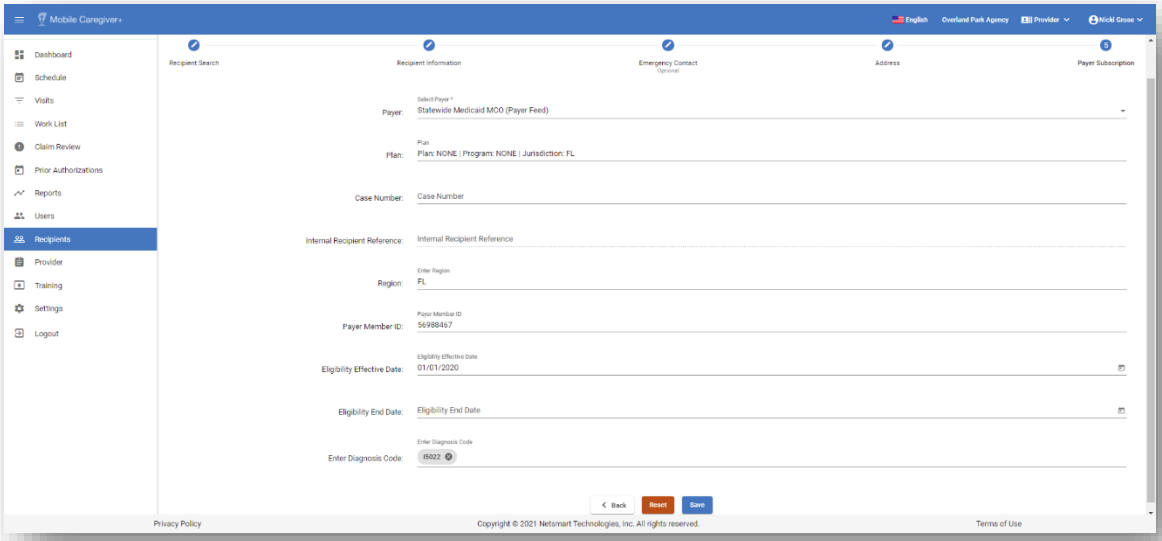
If your agency uses IVR instead of the Netsmart Mobile Care+ app, check the **IVR Phone Number** box.

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

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

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

Entering Payer Subscription Information



1. Enter the following Payer Subscription information.

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

- **Authorization Effective Date:** Enter the date that the prior authorization become effective.
- **Authorization End Date:** Enter the date that the prior authorizations ends.
- **Diagnosis Code:** Enter at least one diagnosis code.

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

   At this step you can also chose to:

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

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

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

Note: If your agency requires a Referring Physician, you can link one to a Recipient by Editing a Recipient *and* Entering a Referring Physician.

Related topics:

- *Searching for and Viewing Recipients*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Importing a Group of New Recipients

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > Importing a Group of New Recipients

When you received the email with your logon credentials during the onboarding process for Mobile Caregiver+, you should have received the Mobile Caregiver+ Recipient Upload Template spreadsheet and Mobile Caregiver+ Recipients Upload Instructions. You can use it to import a group of Recipients into Mobile Caregiver+. To do so you will *complete* and *import* the spreadsheet; instructions follow.

Completing the Spreadsheet

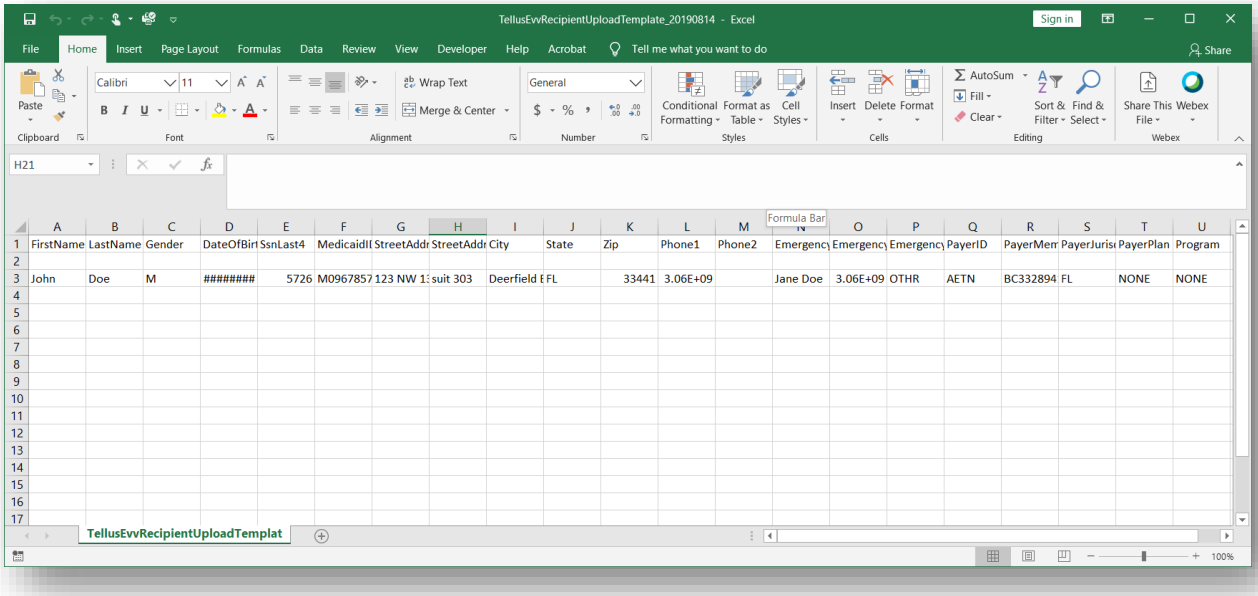
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Importing a Group of New Recipients* > Completing the Spreadsheet

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

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

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

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



Importing the Spreadsheet

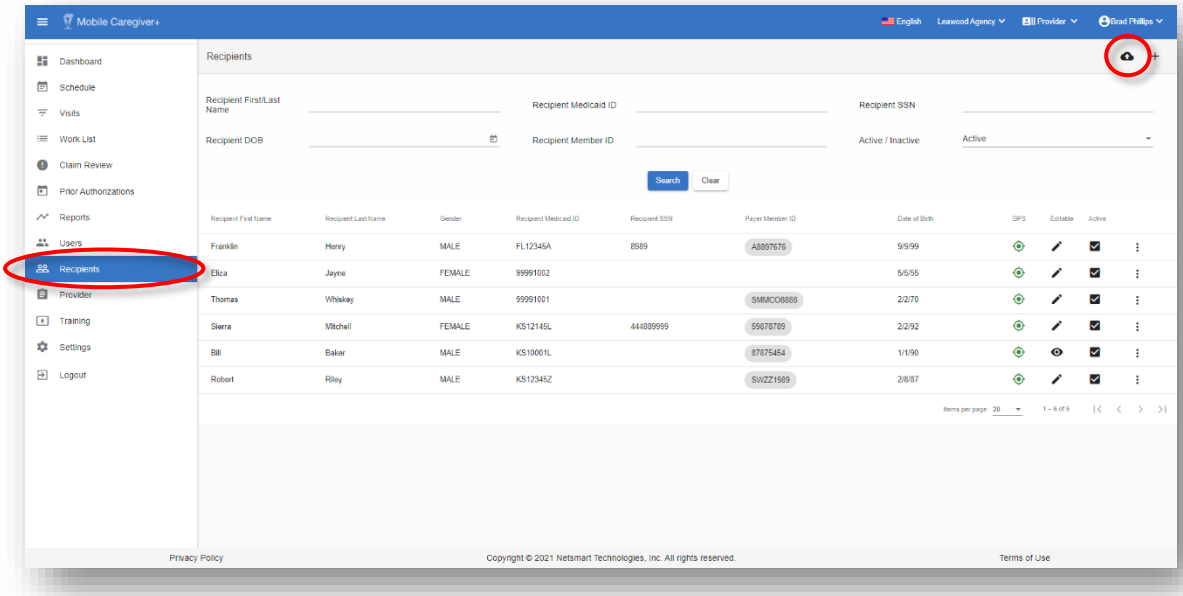
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Importing a Group of New Recipients* > Importing the Spreadsheet

To import the spreadsheet:

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

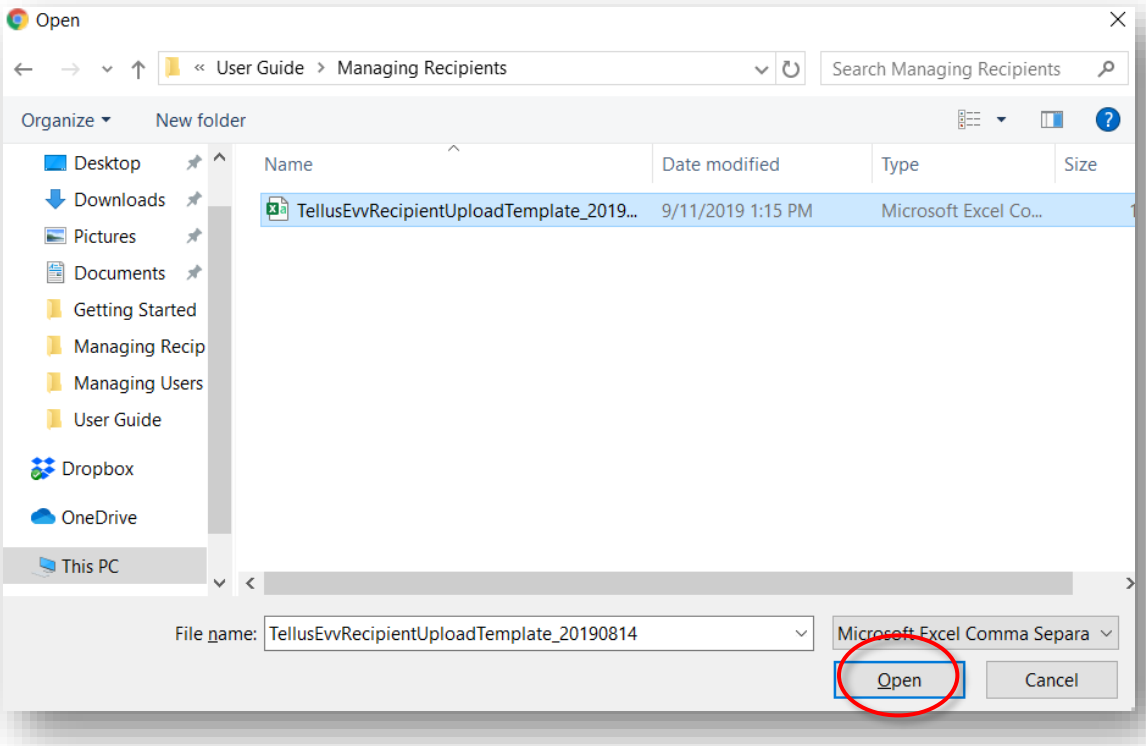
Click the **Recipients** option to see the Recipients page.

Click the “cloud” icon in the upper right corner of the page.

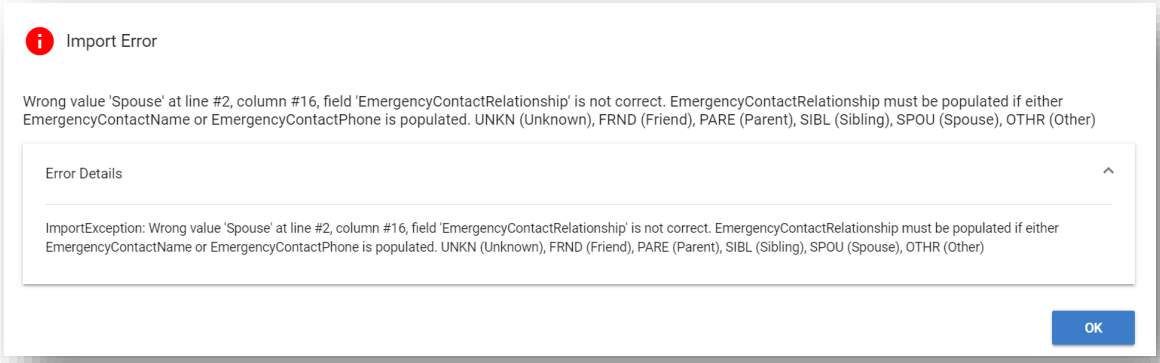


Find and select the file you want to upload.

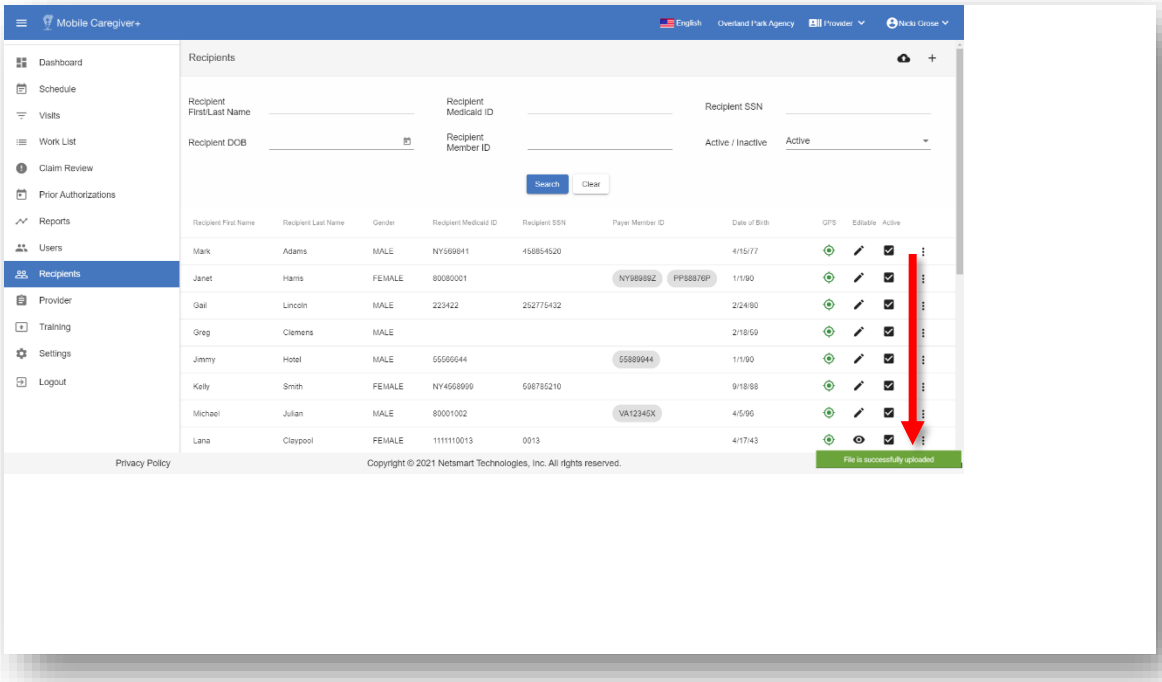
Click ***Open***.



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



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



Related topics:

- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Editing a Recipient

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > Editing a Recipient

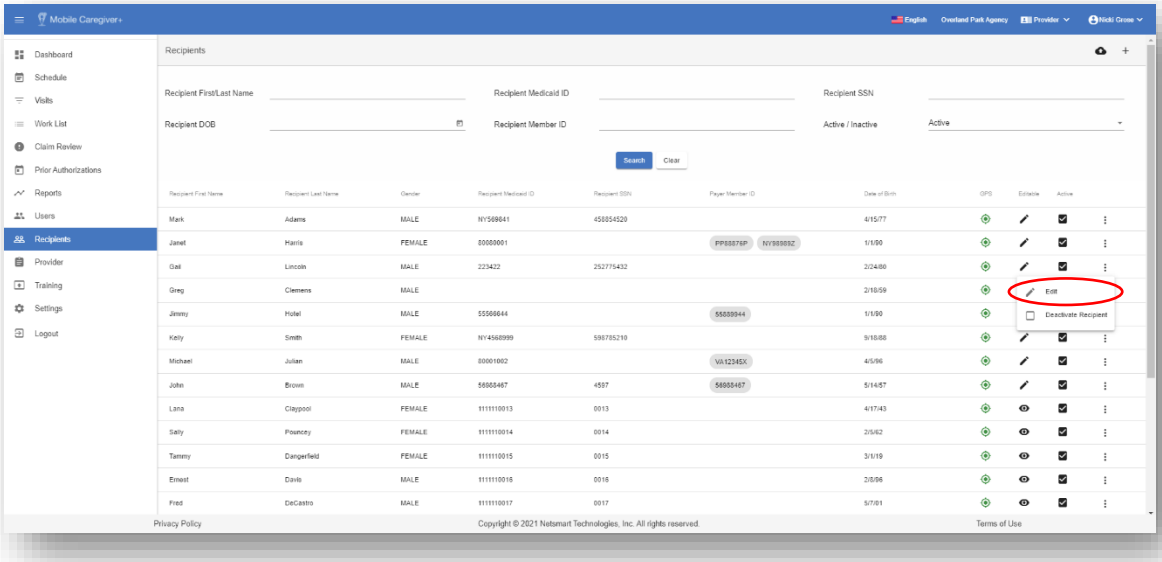
To update information for a Recipient:

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click **Recipients** to see the Recipients page.

Find the Recipient whose information you want to change.

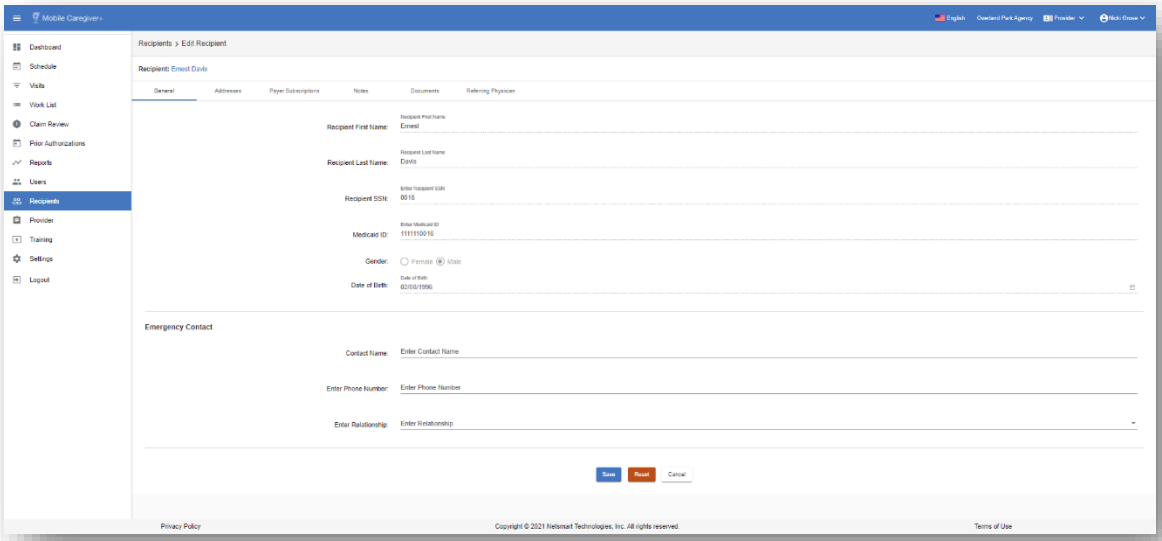
Click the submenu icon (vertical dots) and select ***Edit***.



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

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

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



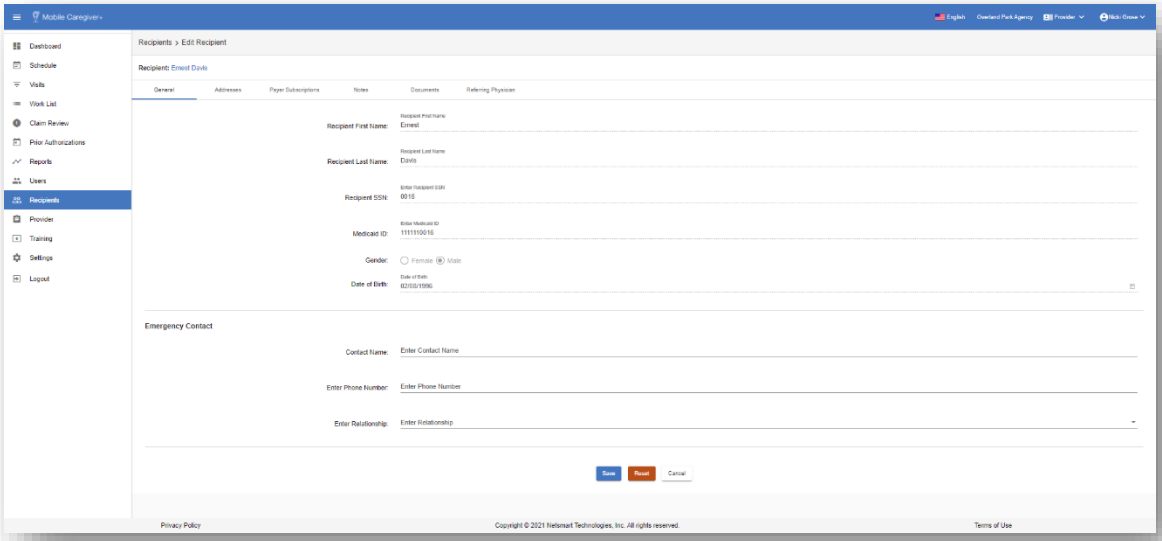
Updating General Recipient Information

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Editing a Recipient* > Updating General Recipient Information

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

1. Update information on this page as needed. If you need help with what to enter in each field, see *Adding Recipient Information* and *Entering Emergency Contact Information*.

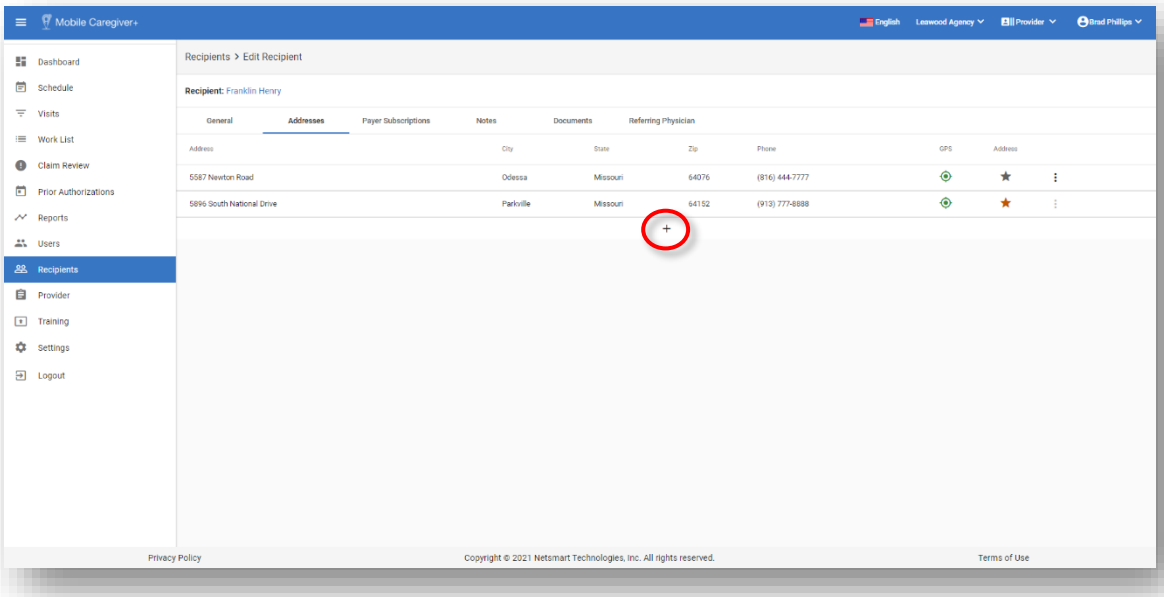
Scroll to the bottom of the page and click ***Save*** when you are finished updating, click ***Reset*** to clear your entries.



Updating Addresses

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Editing a Recipient* > Updating Addresses

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



On this page you can:

- *Update an address*
- *Add a new address*
- *Delete an address*
- *Set an address as the primary address*

Updating an Address

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Editing a Recipient* > *Updating Addresses* > Updating an Address

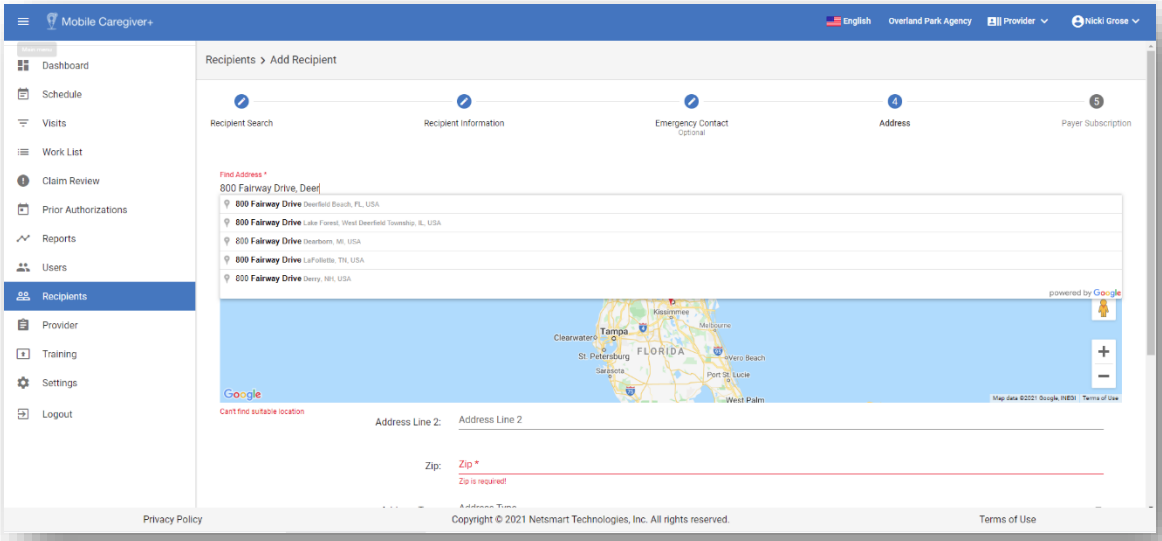
You cannot update an address, but you can *delete an address* and *add a new address*. Instructions are in the sections that follow.

Adding a New Address

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Editing a Recipient* > *Updating Addresses* > Adding a New Address

To add a new address:

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



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

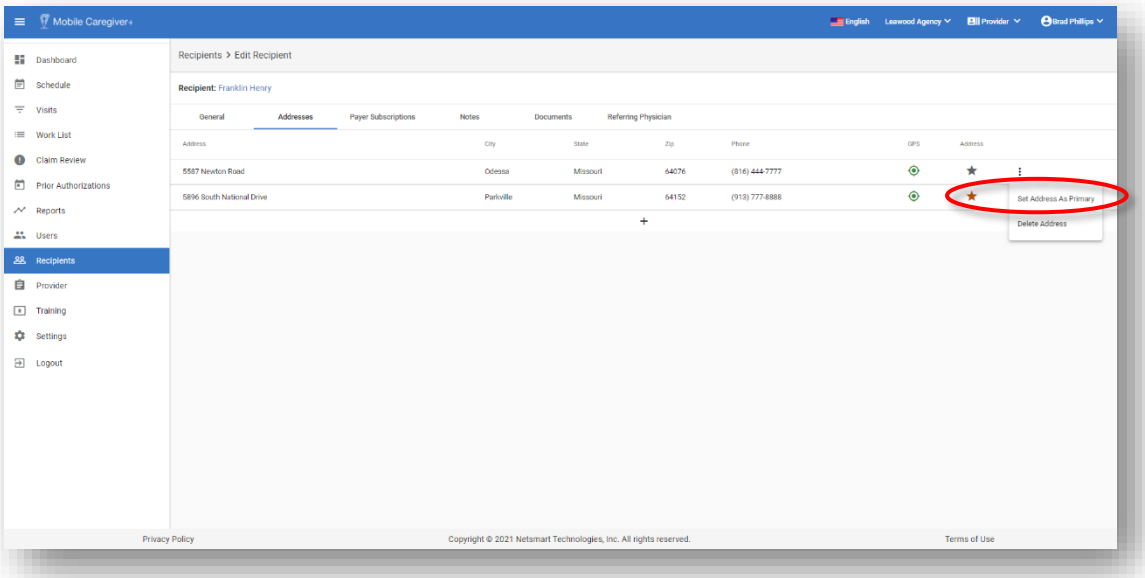
Setting an Address as Primary

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Editing a Recipient* > *Updating Addresses* > Setting an Address as Primary

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

1. Click the (vertical dots) for the address you want to set as primary.

Select **Set Address as Primary**.



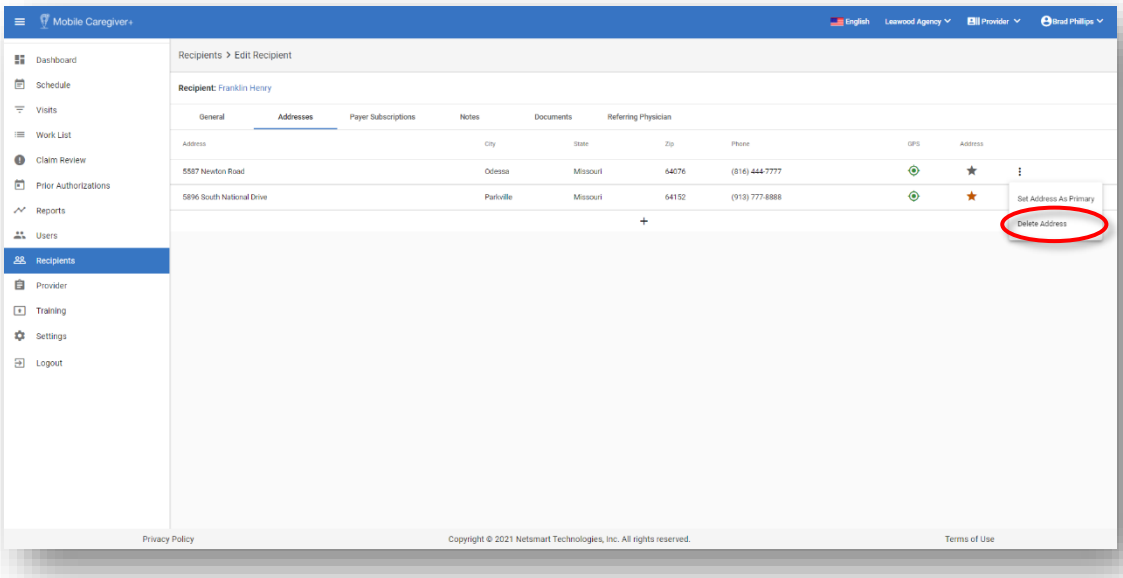
Deleting an Address

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Editing a Recipient* > *Updating Addresses* > Setting an Address as Primary

To delete an address:

1. Click the (vertical dots) for the address you want to delete.

Select **Delete Address**.



Related topics:

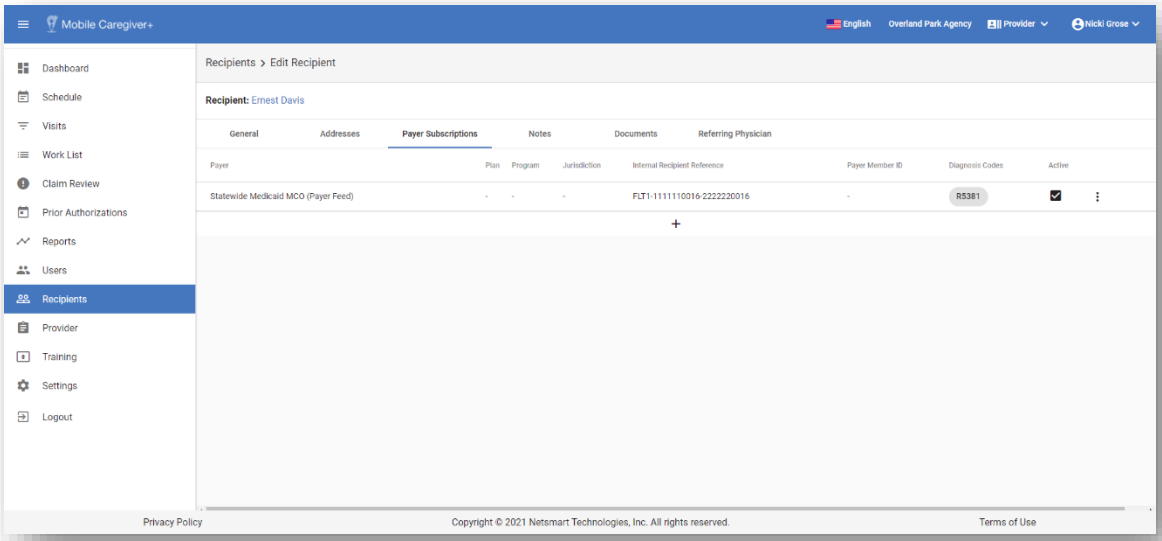
- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*

Updating Payer Subscriptions (User to contact Netsmart customer service)

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Editing a Recipient* > Updating Payer Subscriptions

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

- *Add a new payer*
- *Delete a payer*



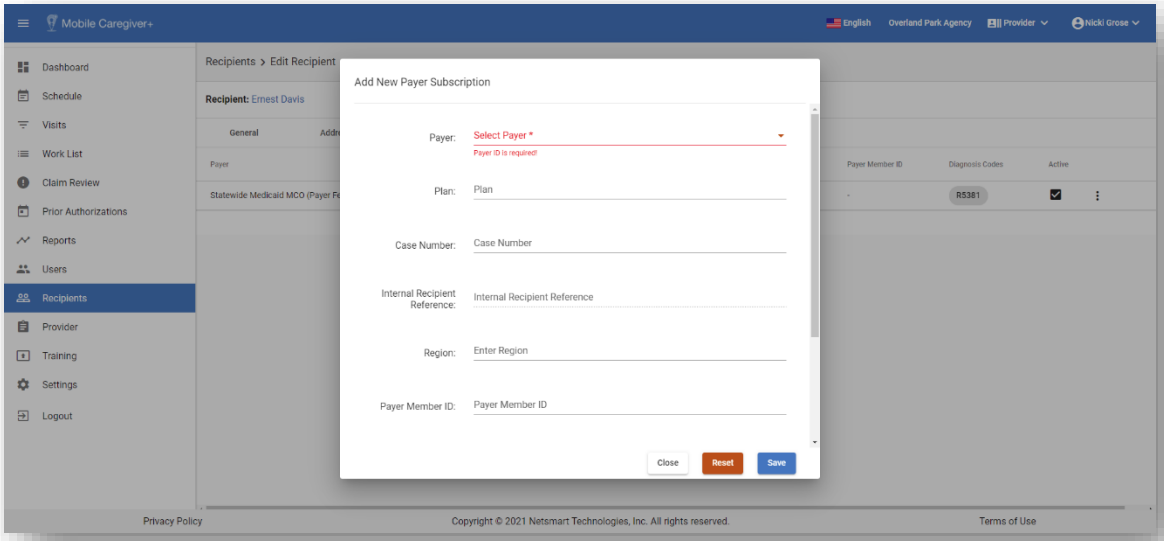
Adding a New Payer (User to contact Netsmart customer service)

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Editing a Recipient* > *Updating Payer Subscriptions* > Adding a New Payer

To add a new Payer:

1. Click the “add new payer” icon (plus sign) at the bottom of the list of Payers to open the Add New Payer page. (If you need help with what to enter in payer fields for a Recipient, see *Entering Payer Subscription Information*.)

Be sure to click ***Save*** when you finish making your entries, or, to clear your entries, click ***Reset***.



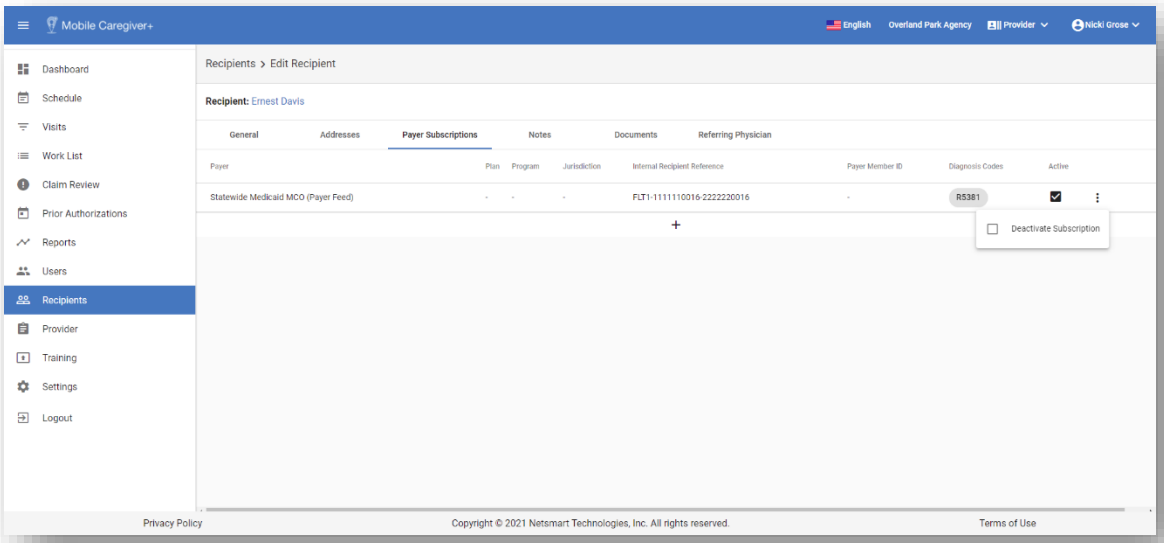
Deleting a Payer (User to contact Netsmart customer service)

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Editing a Recipient* > *Updating Payer Subscriptions* > Deleting a New Payer

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

1. Click the submenu (vertical dots) for the payer you want to delete.

Click **Delete Payer Subscription**.



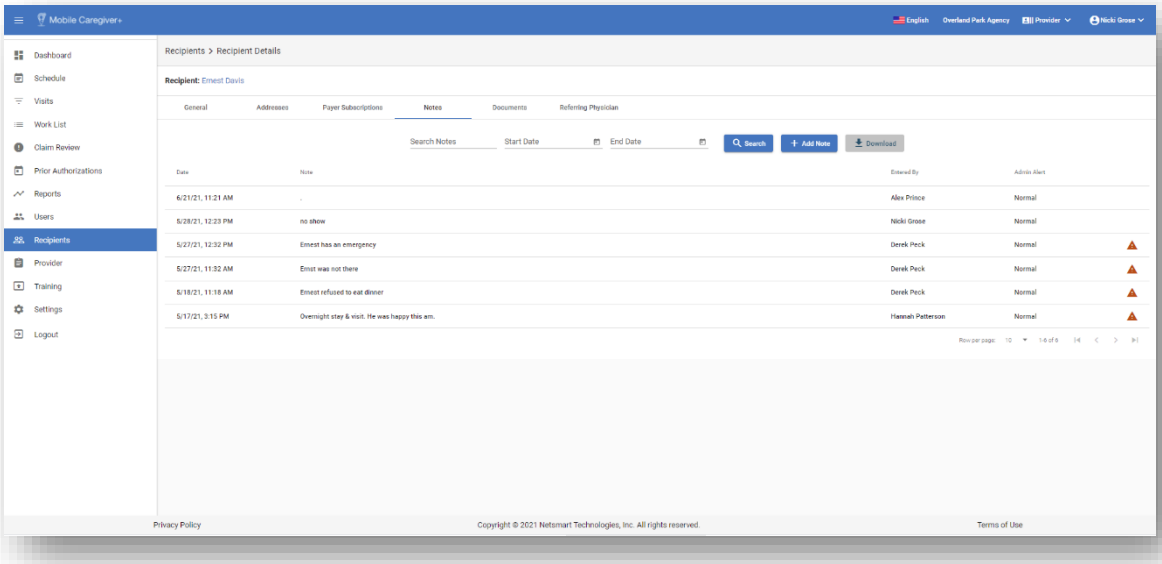
Entering Notes

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Editing a Recipient* > Entering Notes

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

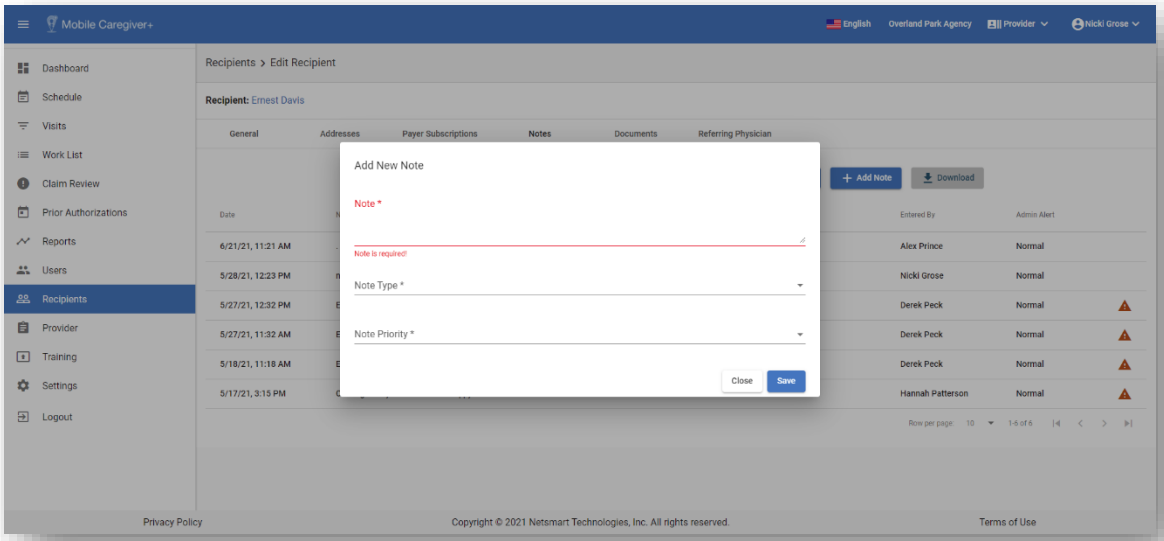
Note: Notes with a yellow triangle shown, like the one shown below, indicate the note was marked as "Alert My Administrator" when the Caregiver sent it from their Netsmart Mobile Care+ app or was marked as "Alert" Note Type when it was entered in the Administrator Console.

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



You can also add a note:

1. Click ***+ Add Note***.



Enter your **Note** text.

Choose a **Note Type** (None, Alert, Normal).

If you select “Alert,” a yellow triangle, like the one shown below will appear to the right of the note.

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

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

Click ***Save***.

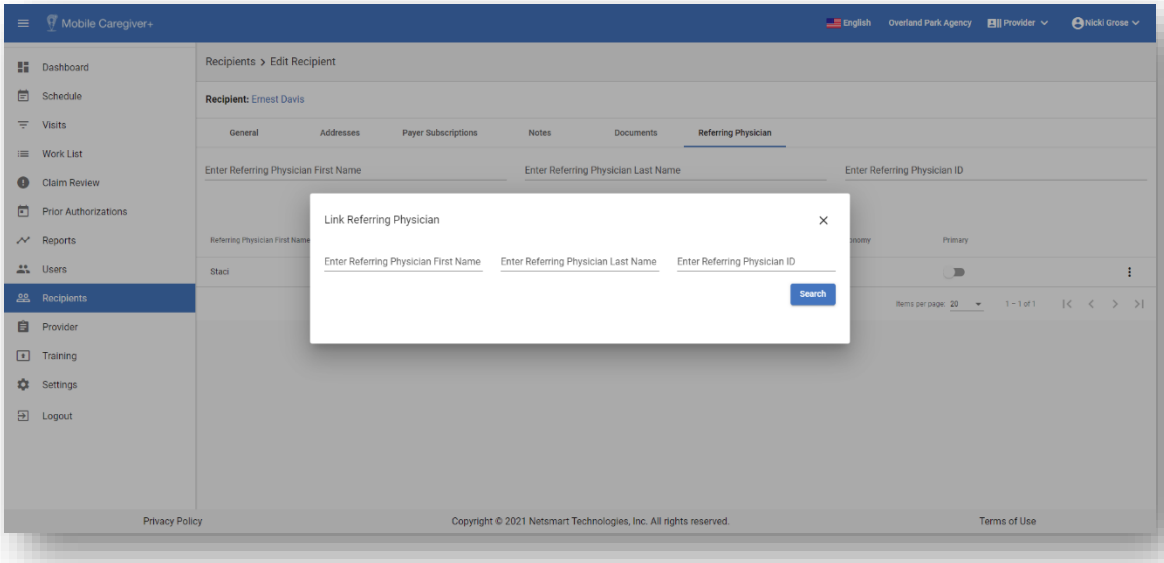
Entering a Referring Physician

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > *Editing a Recipient* > Entering a Referring Physician

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

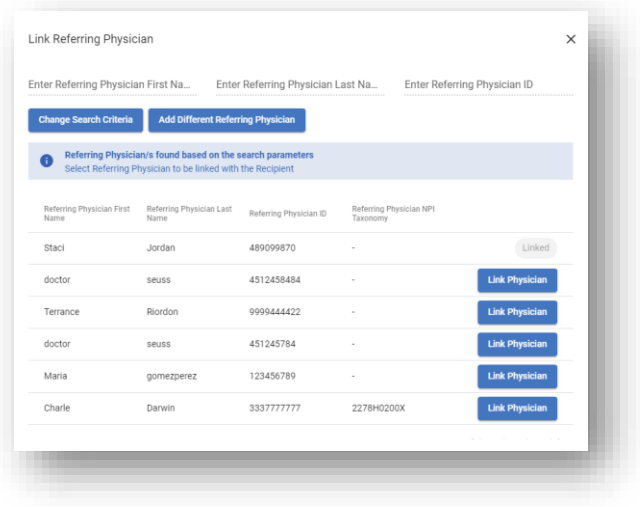
To add a Referring Physician:

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



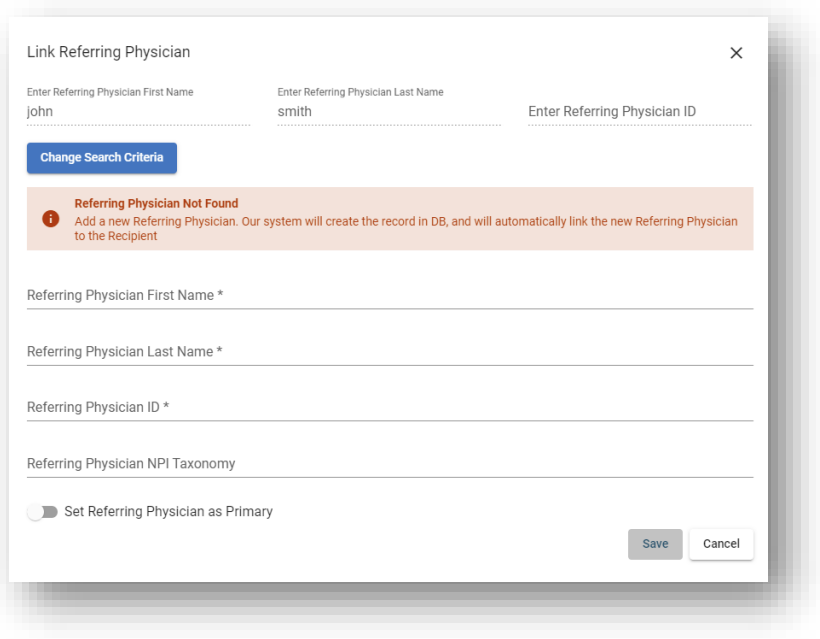
Enter all or part of a Referring Physician's name and then click ***Search***.

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



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

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



Enter the Referring Physician's first and last name and 10-digit NPI in the appropriate fields.

Click ***Save***.

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

Related topics:

- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Uploading Documents for a Recipient

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > Uploading Documents for a Recipient

You can upload documents like progress notes or dietary instructions for a Recipient.

Documents must be in PDF, .BMP, .JPEG format and maximum file size is 1Mb.

To upload a document:

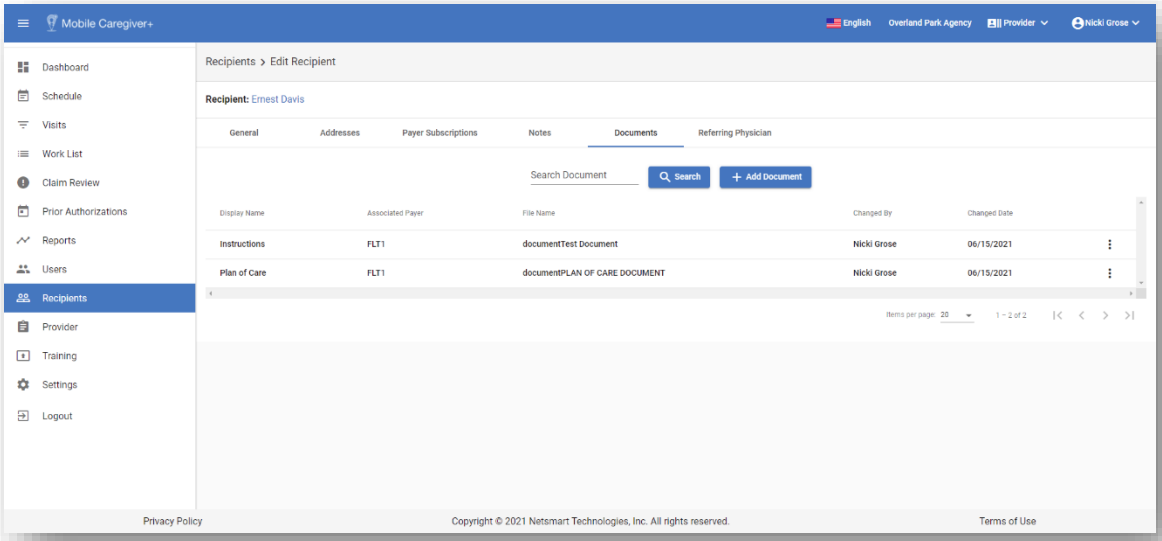
1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click Recipients to see the **Recipients** page.

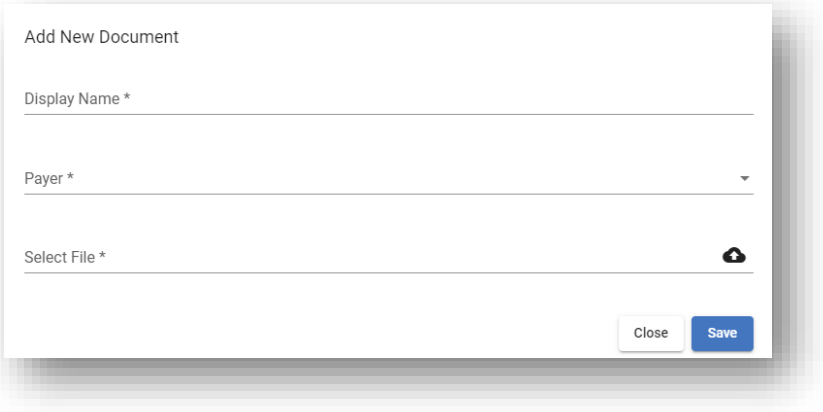
Find the Recipient for whom you want to upload documents.

Click the submenu icon (vertical dots) and select ***Edit***.

Click the **Documents** tab.



Click ***+ Add Document***.



In the Add New Document dialogue enter a **Document Name**.

Use the dropdown list to select a **Payer**.

Click the “cloud” icon next to the **Select File** field to search for and select the file you want to upload.

When you return to the Add New Document dialogue, click ***Save***.

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

Related topics:

- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*

Managing Uploaded Document

You can delete or download documents for a Recipient.

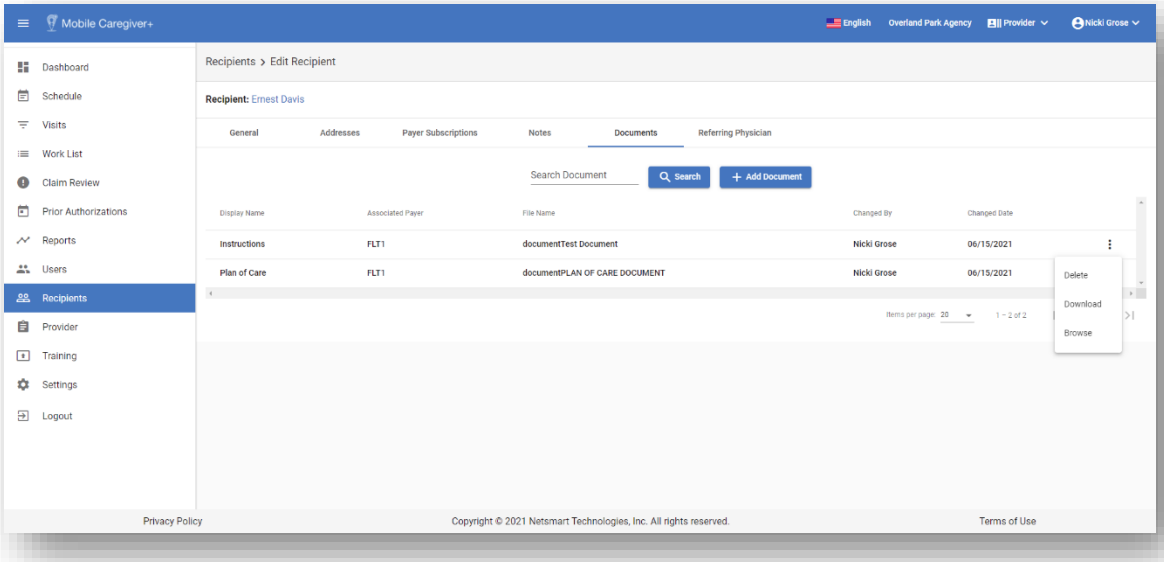
1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click Recipients to see the **Recipients** page.

Find the Recipient for whom you want to delete or download a document.

Click the submenu icon (vertical dots) and select ***Edit***.

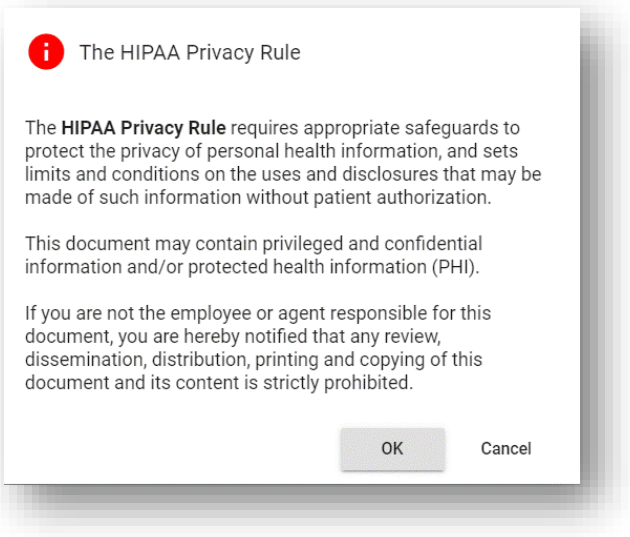
Click the **Documents** tab.



Find the document you want to work with and click the submenu icon (vertical dots).

Choose one of the following:

- ***Delete*** allows you to remove the document.
- ***Download*** allows you to download the document. The following HIPAA Privacy Rule screen will open; click ***OK*** to continue.



Related topics:

- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Deactivating a Recipient

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > Deactivating a Recipient

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

Deactivating a Recipient does not remove them from Mobile Caregiver+; it simply hides the record from view. You can *activate inactive Recipients* at any time.

To deactivate a Recipient:

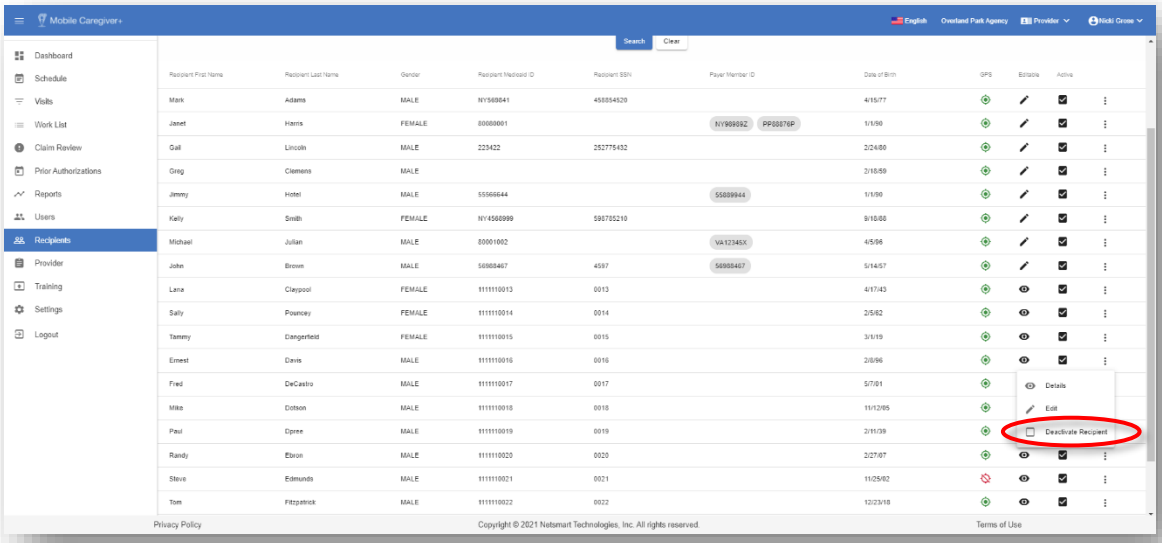
1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click **Recipients** to see the Recipients page.

Find the Recipient you want to deactivate.

Click the submenu icon (vertical dots) and click the ***Deactivate Recipient*** option.

The Recipient no longer appears in your Recipients list.



Related topics:

- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Activating an Inactive Recipient*

Activating an Inactive Recipient

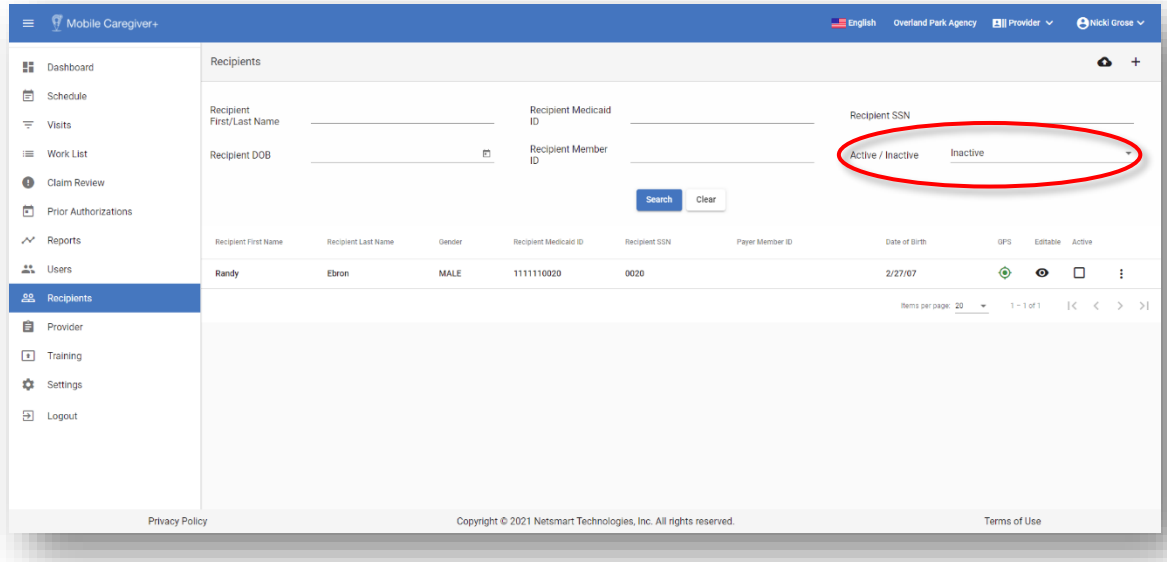
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Recipients* > Activating an Inactive Recipient

To activate an inactive Recipient:

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click **Recipients** to see the Recipients page.

Find the Recipient you want to activate; be sure to select Inactive in the **Active/Inactive** field.



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

Related topics:

- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*

Managing Provider Agencies

You are here: *Mobile Caregiver+ Administrator User Guide* > Managing Provider Agencies

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

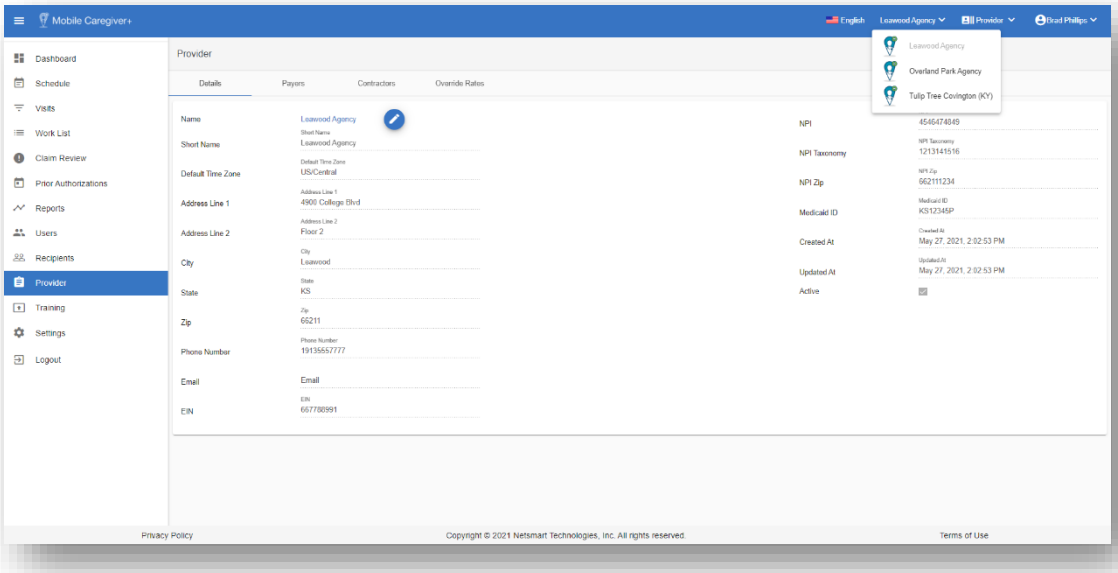
Click a topic below:

- Searching for a Provider Agency
- Updating Provider Agency Details
- Managing Payers
  - Searching for a Payer
  - Assigning Tasks to a Payer Service Code
  - Manually Adding a New Task for a Payer Service Code
  - Deleting Manually Added Tasks for a Payer
  - Linking a Payer to a Provider
  - Deleting Payers
- Managing Contractors
  - Searching for a Contractor
  - Linking a Provider to a Contractor
  - Deleting a Contractor
- Managing Payer Override Rates
  - Searching for a Specific Payer Override Rate
  - Adding a Payer Override Rate
  - Updating a Payer Override Rate
  - Restoring a Payer Override Rate
  - Deleting a Payer Override Rate

Searching for a Provider Agency

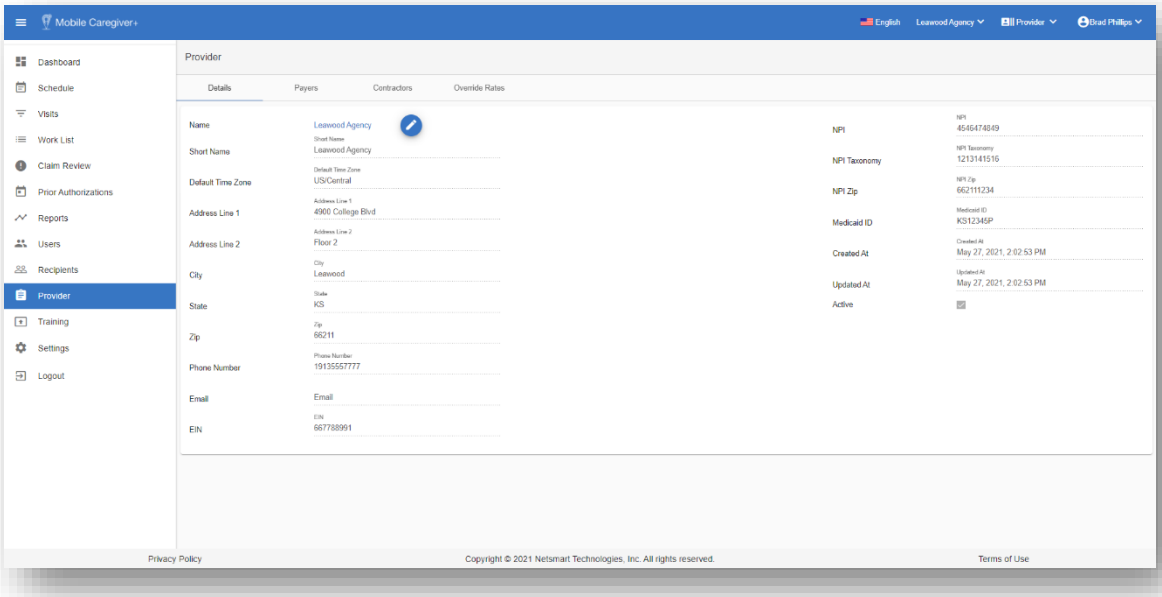
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > Searching for a Provider

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



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

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



Related Topics

- *Updating Provider Agency Details*
- *Managing Payers*
- *Managing Contractors*
- *Overriding Payer Rates*

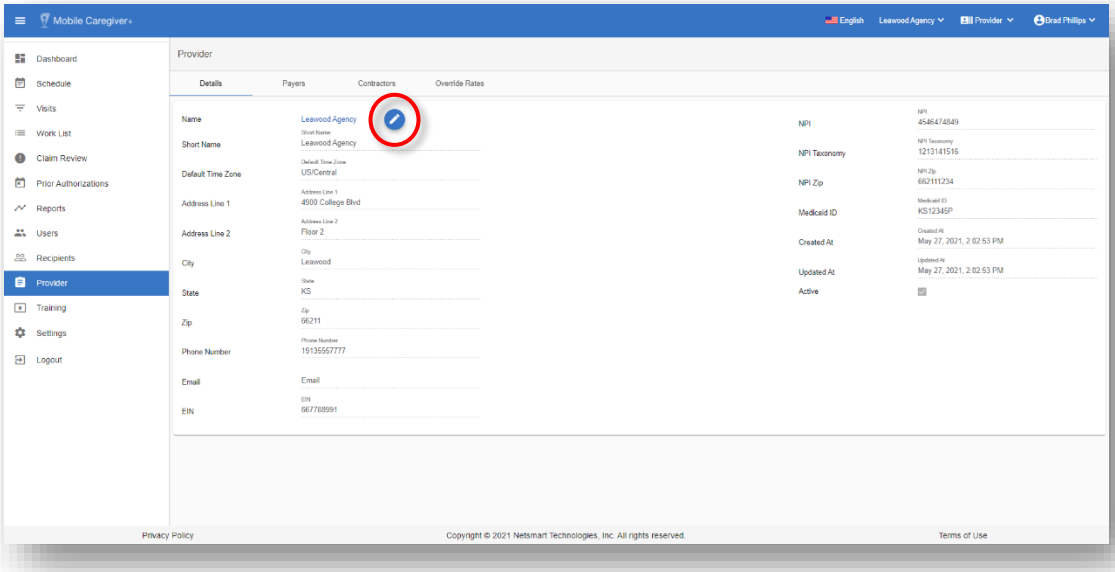
Updating Provider Agency Details

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > Updating Provider Agency Details

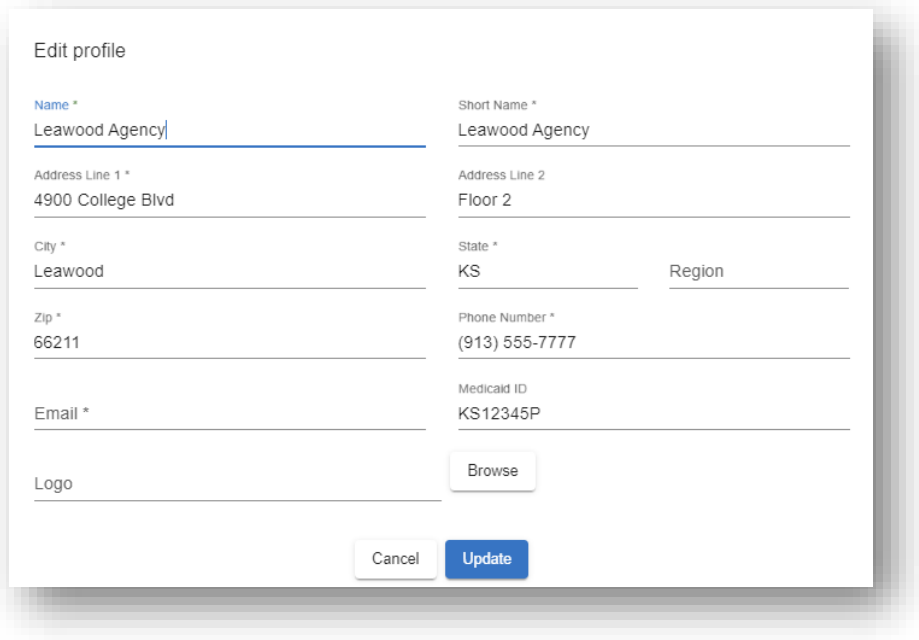
To update a Provider Agency's details:

1. If your Provider Agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Provider** option; the page opens to the **Details** tab.



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



Enter new information as needed.

Click ***Update*** to save your entries; click ***Cancel*** if you do not want to save your changes.

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

Related Topics

- *Searching for a Provider Agency*
- *Managing Payers*
- *Managing Contractors*
- *Overriding Payer Rates*

Managing Payers

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > Managing Payers

In his section you will find information about:

- *Searching for a Payer*
- *Activating and Deactivating Tasks for a Payer*
- *Manually Adding a New Task for a Payer*
- *Deleting Manually Added Tasks for a Payer*
- *Linking Provider to Payers*
- *Deleting Payers*

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

Note: Contracts are not currently used.

Searching for a Payer

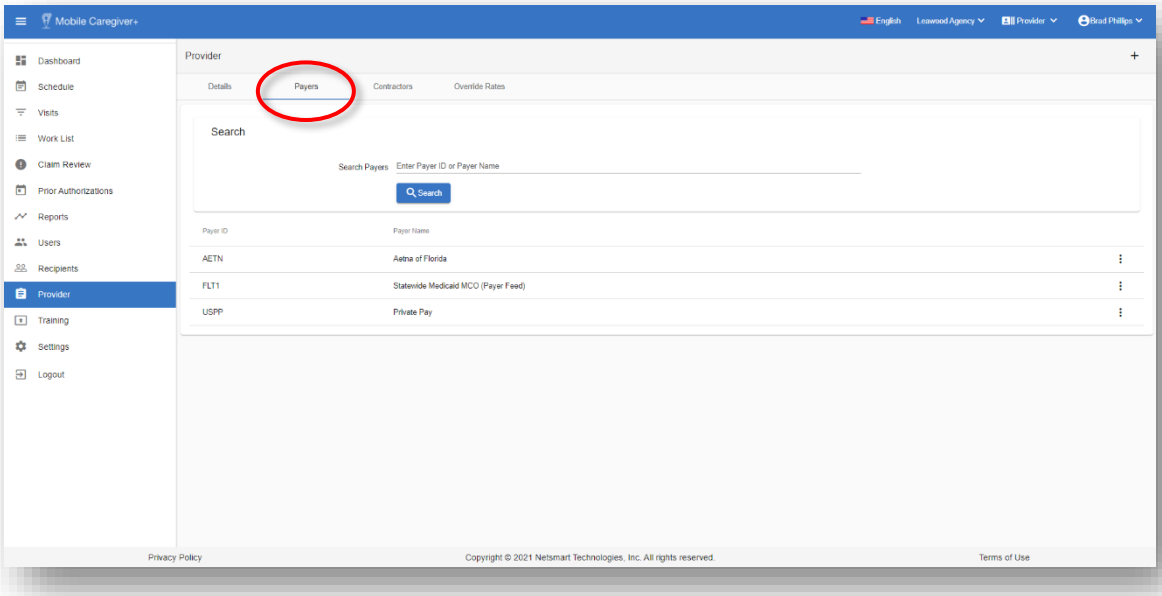
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Payers* > Searching for a Payer

To search for a Payer:

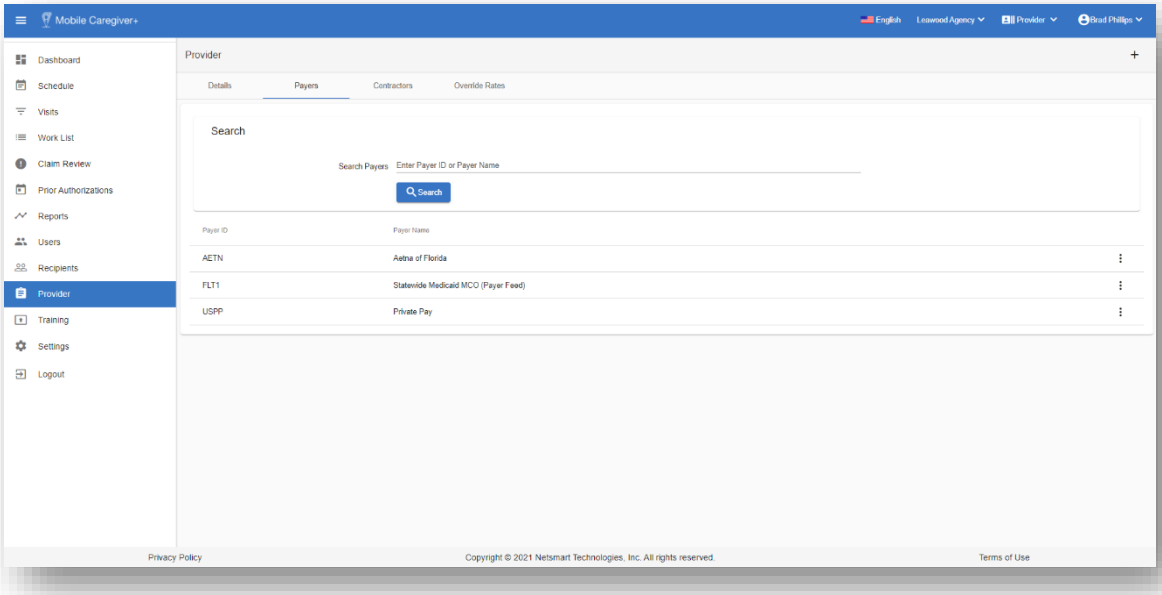
1. If your Provider Agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Provider** option.

3. Click the **Payers** tab to see the Payers associated with the Provider.



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



5. Click ***Search***.

Assigning Tasks to a Payer Service Code

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Payers* > Assigning a Task to a Payer Service Code

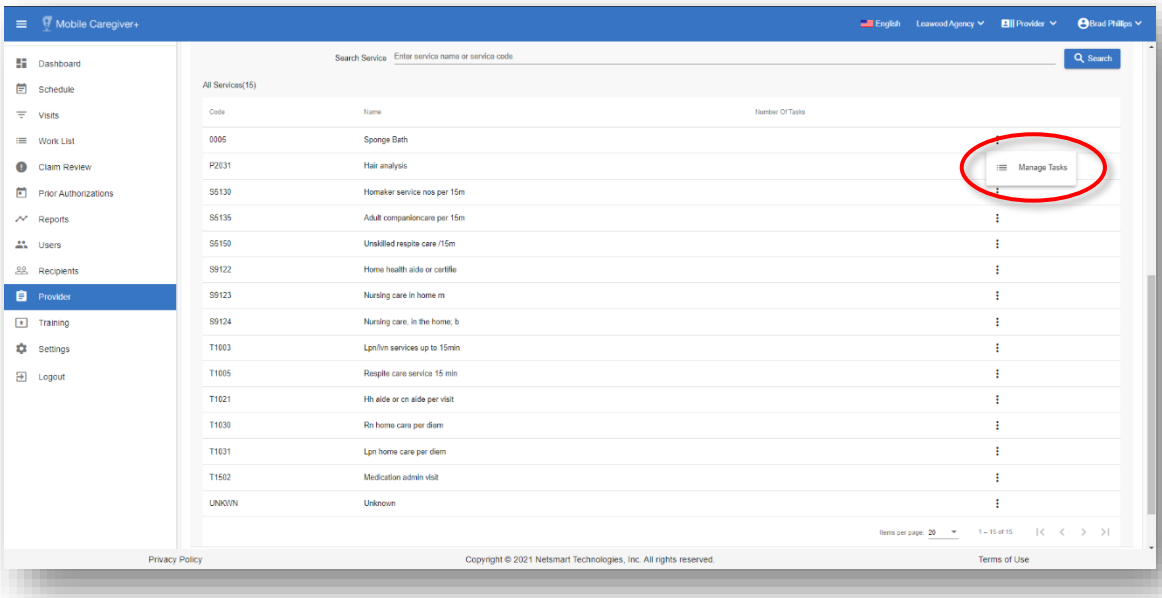
Tasks are part of the Provider/Payer information that is uploaded to the Mobile Caregiver+ system. Generally, you will not have to change this information, but on occasion a Payer may allow new services or discontinue others.

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

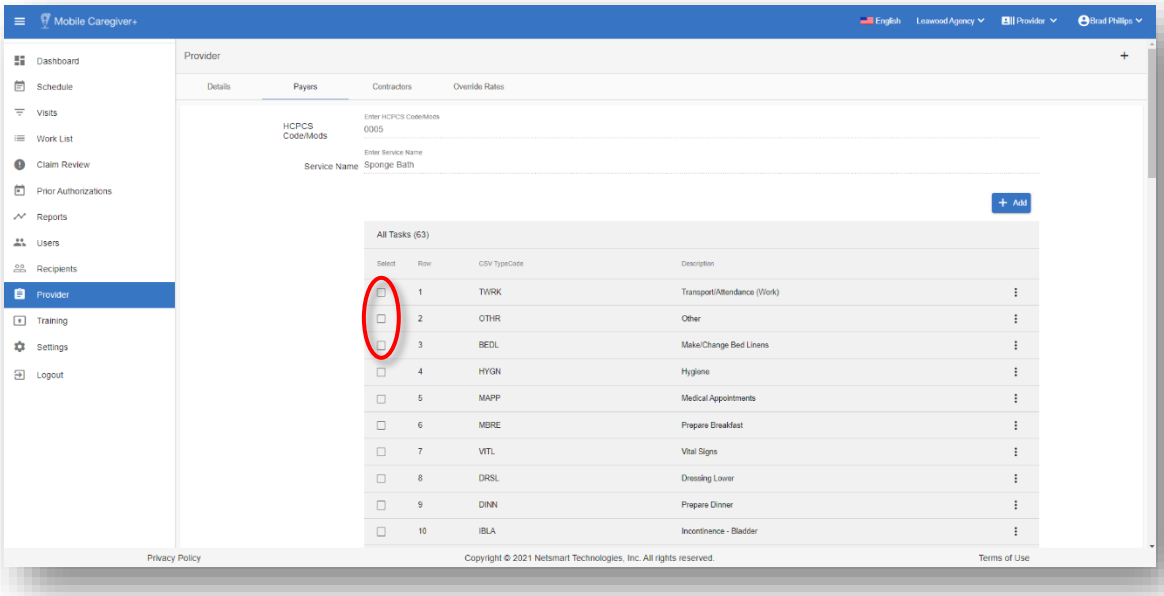
1. If your Provider Agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Provider** option.

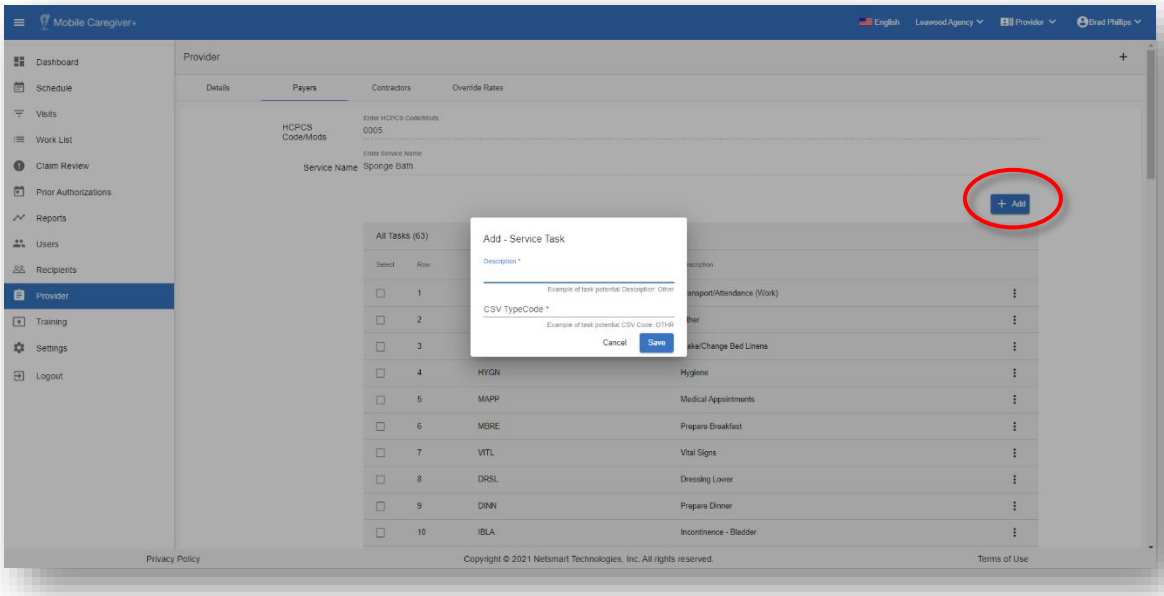
3. Click the **Payers** tab.
4. *Find the Payer* you want to whose tasks you need to change.
5. Find the task you want to update.
6. Click the submenu (vertical dots) and select **Manage Tasks.**



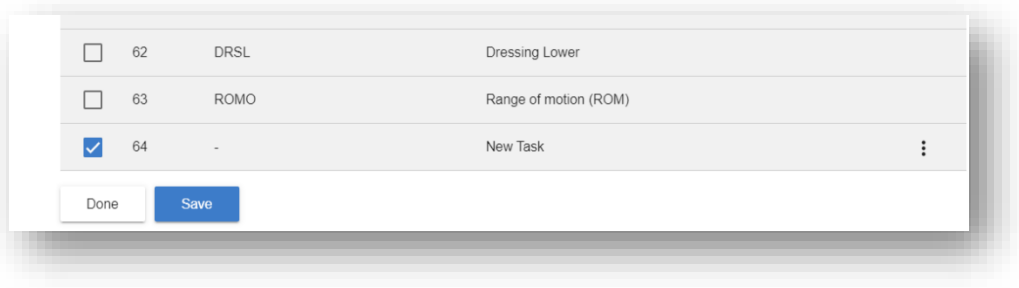
7. When the task page opens, check the tasks that the Payer allows to be provided to Recipients; uncheck those that the Payer does not allow.



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



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



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

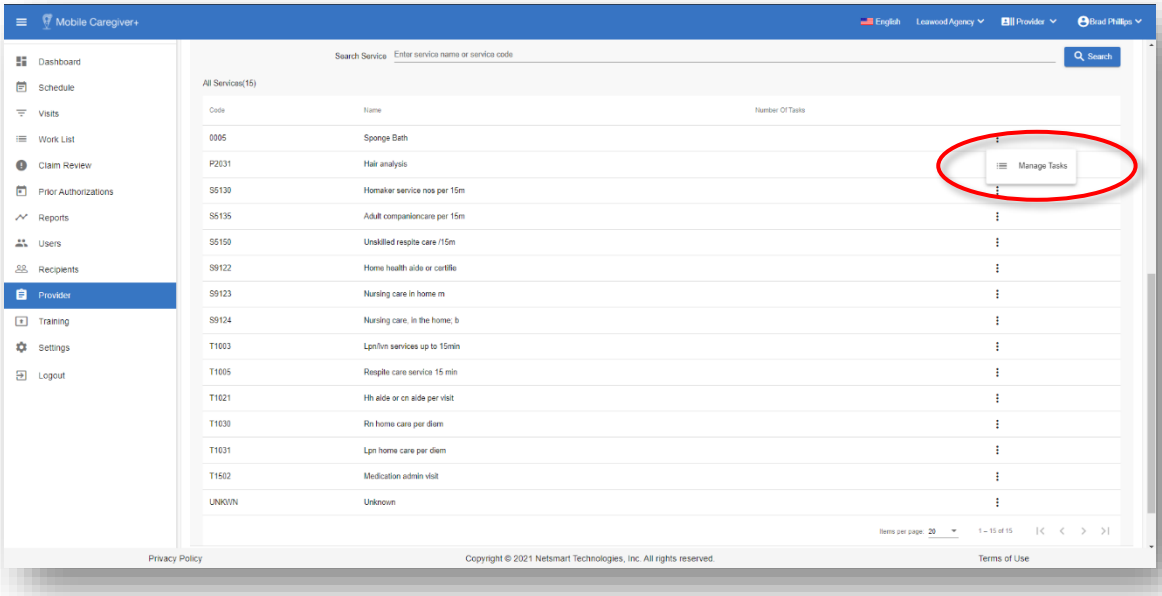
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Payers* > Manually Adding a New Task for a Payer Service Code

To add a new task:

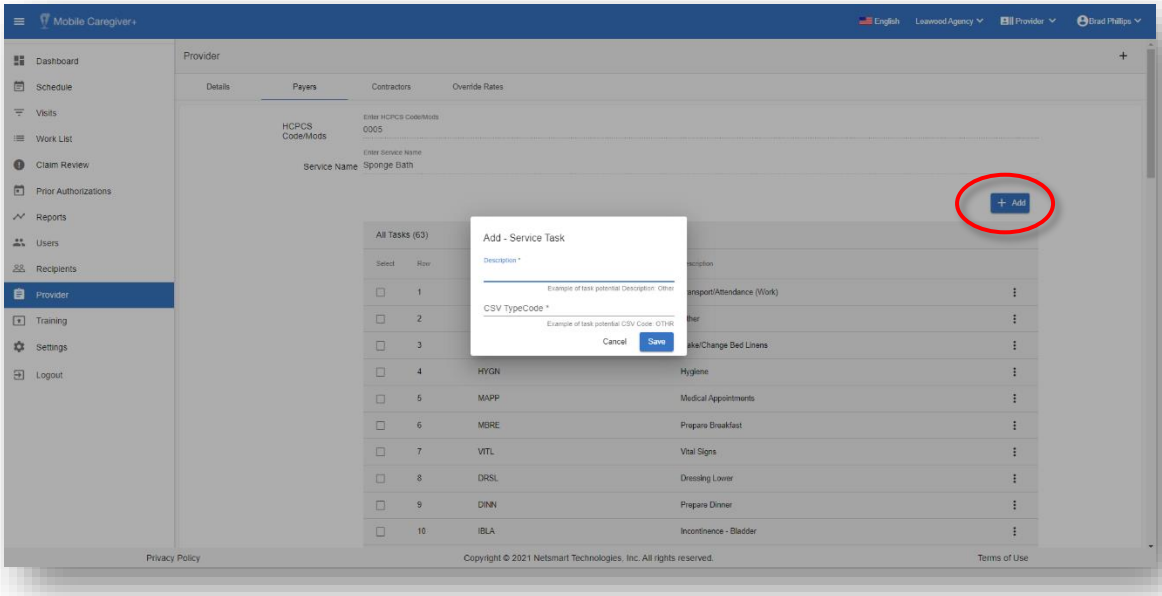
1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Provider** option.

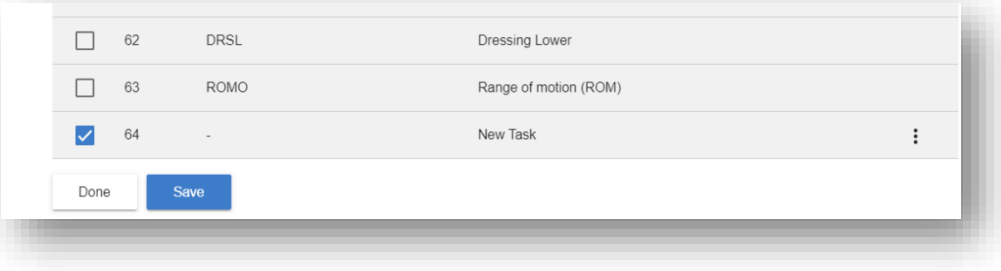
3. Click the **Payers** tab.
4. *Find the Payer* that you want to add a task to.
5. Find the task you want to add the task to.
6. Click the submenu (vertical dots) and select **Manage Tasks.**



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



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


62
DRSL
Dressing Lower
63
ROMO
Range of motion (ROM)
64
-
New Task
Done
Save

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

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > Deleting Manually Added Tasks for a Payer

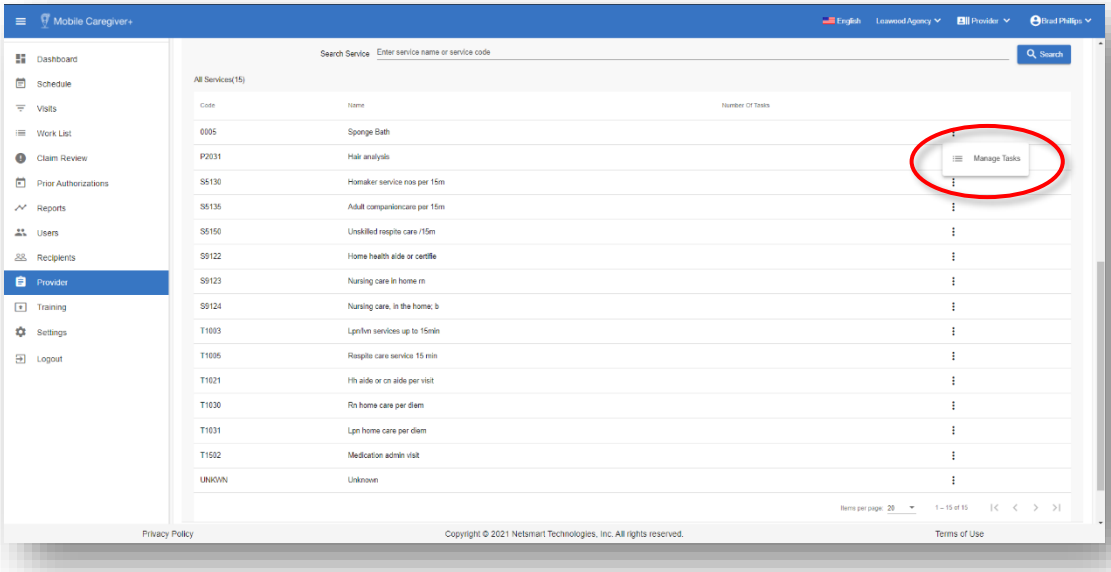
Note: You can only delete tasks that have been entered through the Provider option on the Mobile Caregiver+ Administrator console. Tasks that are uploaded with Provider and Payer information cannot be deleted.

To delete a task:

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

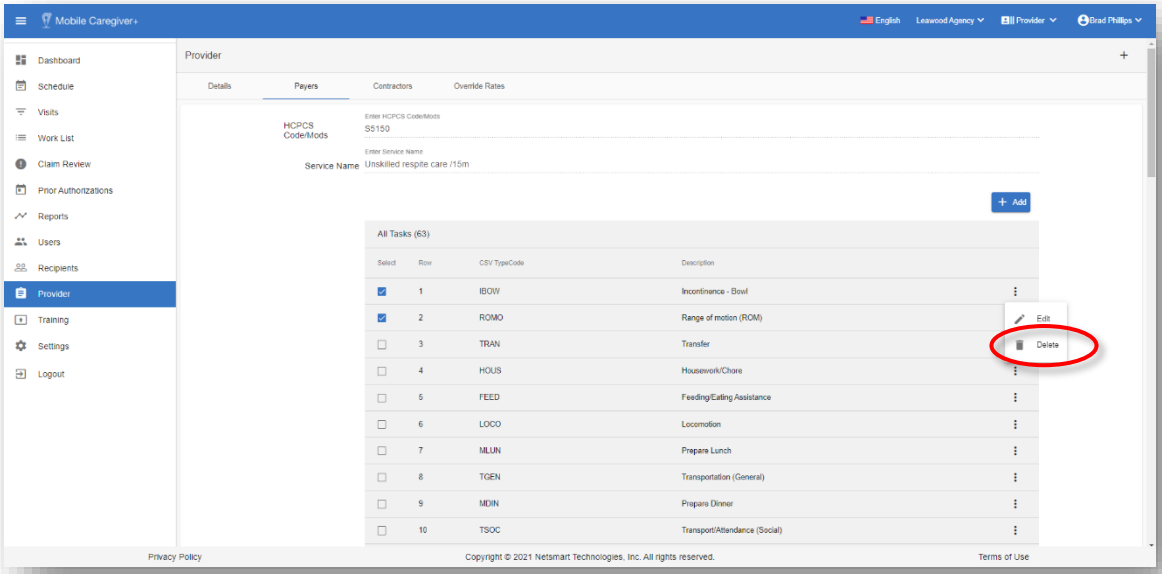
Click the **Provider** option.

3. Click the **Payers** tab.
4. *Find the Payer* that you want to delete the task form.
5. Find the task you want to delete the task from.
6. Click the submenu (vertical dots) and select **Manage Tasks.**



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

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



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

Linking a Payer to a Provider

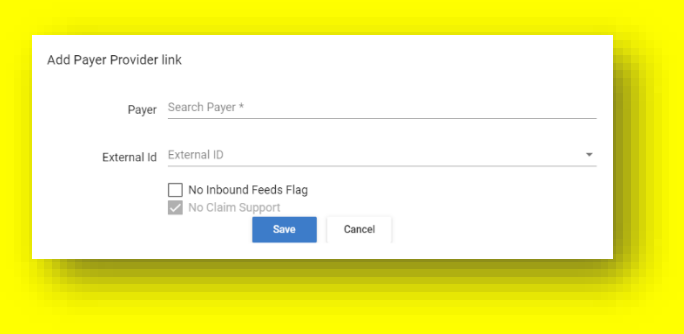
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Payers* > Linking a Payer to a Provider

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

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

Click the **Provider** option.

3. Click the **Payers** tab.
4. *Find the Payer* you want to link.
5. Click the "add payer" icon (plus sign) in the upper right corner of the page.



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

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

8. Click ***Save***.

Deleting Payers

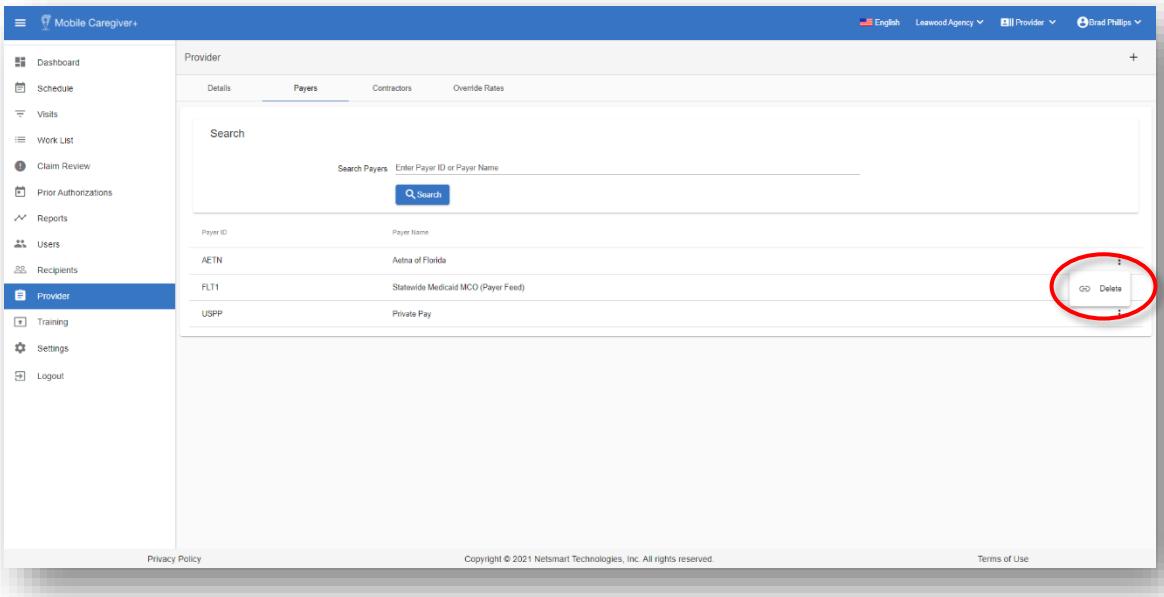
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Payers* > Deleting Payers

Note: Not all agencies are authorized to delete payers.

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

Click the **Provider** option.

5. Click the **Payers** tab.
6. *Find the Payer* you want to delete.
7. Click Payers tab, click submenu (vertical dots), select **Delete**.



Related Topics

- *Searching for a Provider Agency*
- *Updating Provider Agency Details*
- *Managing Contractors*
- *Overriding Payer Rates*

Managing Contractors

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > Managing Contractors

In his section you will find information about:

- *Searching for a Contractor*
- *Linking a Provider to Contractors*
- *Deleting a Contractor*

Searching for a Contractor

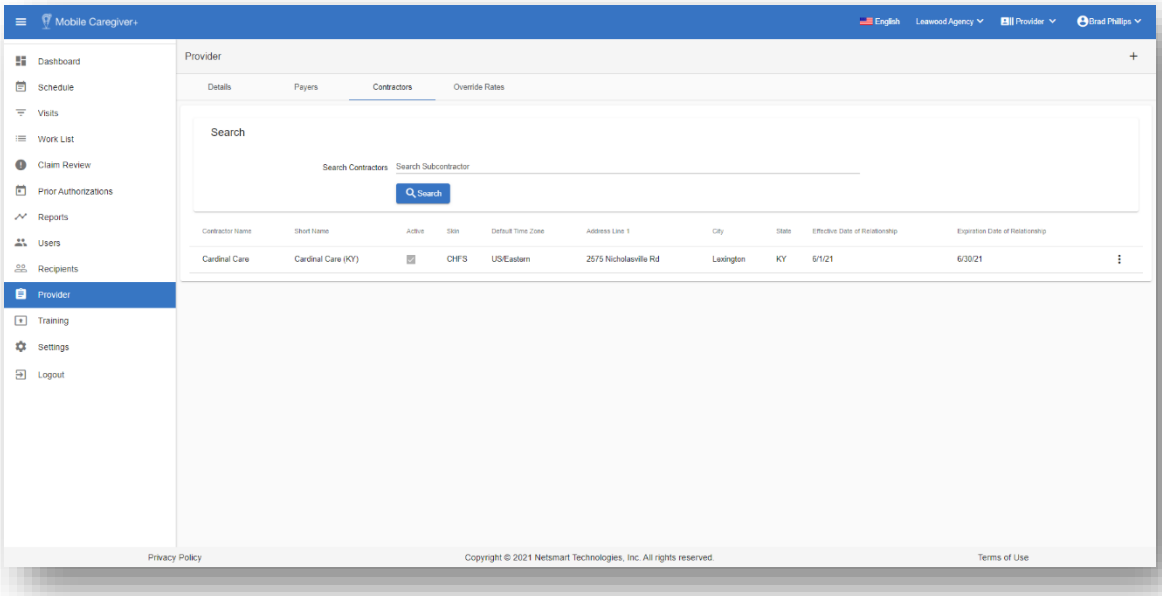
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Contractors* > Searching for a Contractor

To find a Contractor:

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

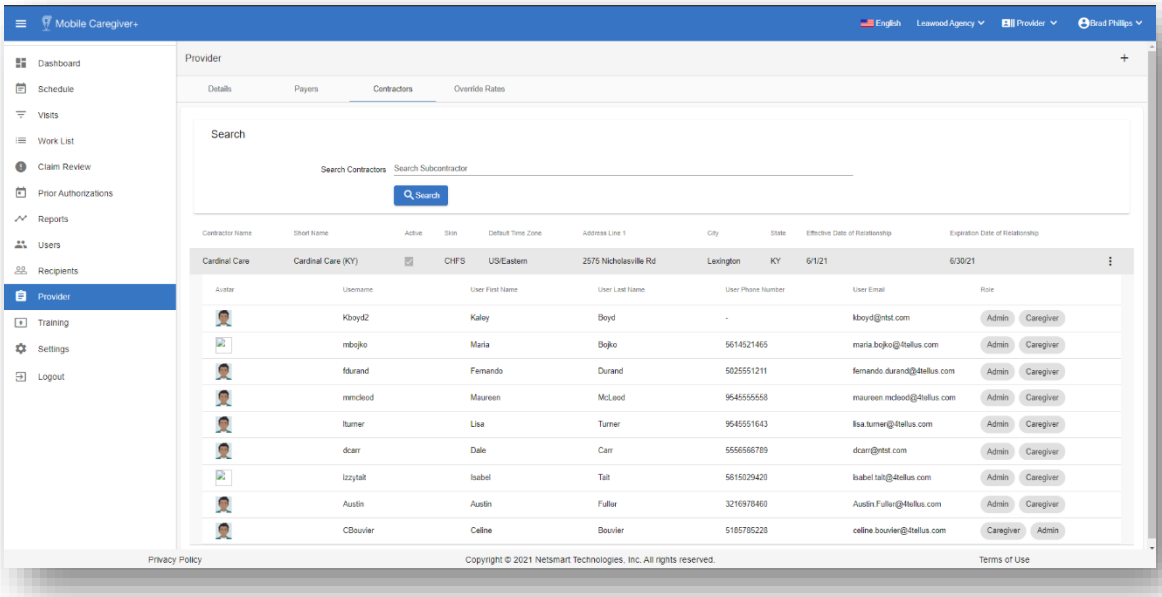
Click the **Provider** option.

3. Click the **Contractors** tab to see the Contractors associated with the Provider.

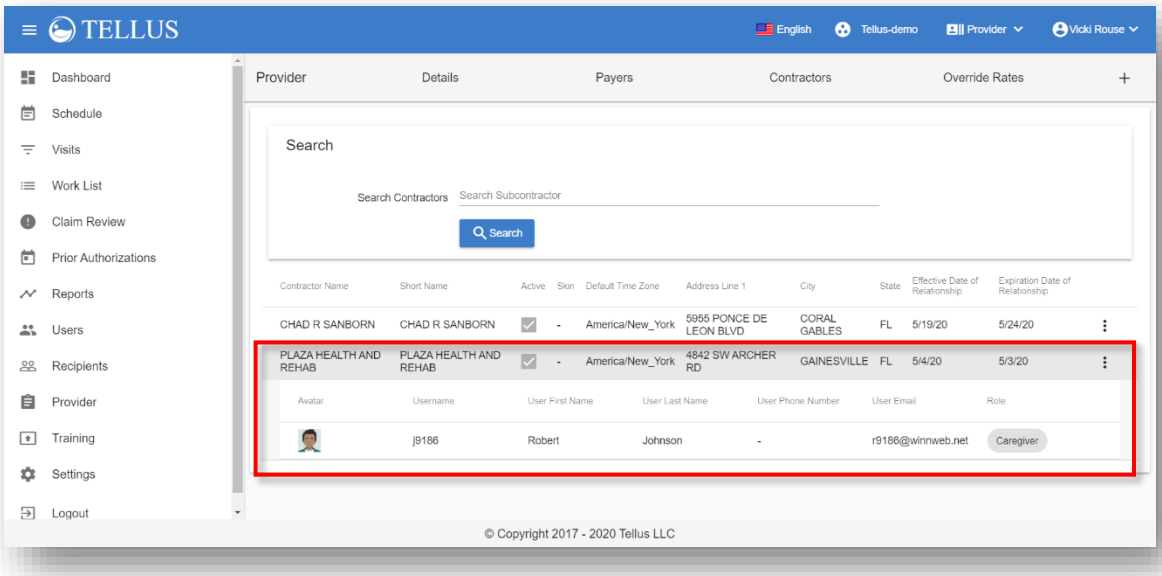


4. Enter all or part of the Contractor name in the **Search Contractor** field.

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



6. Click a line to see Contractor details.



Linking a Provider to a Contractor

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Contractors* > 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 will be able to schedule visits for them.

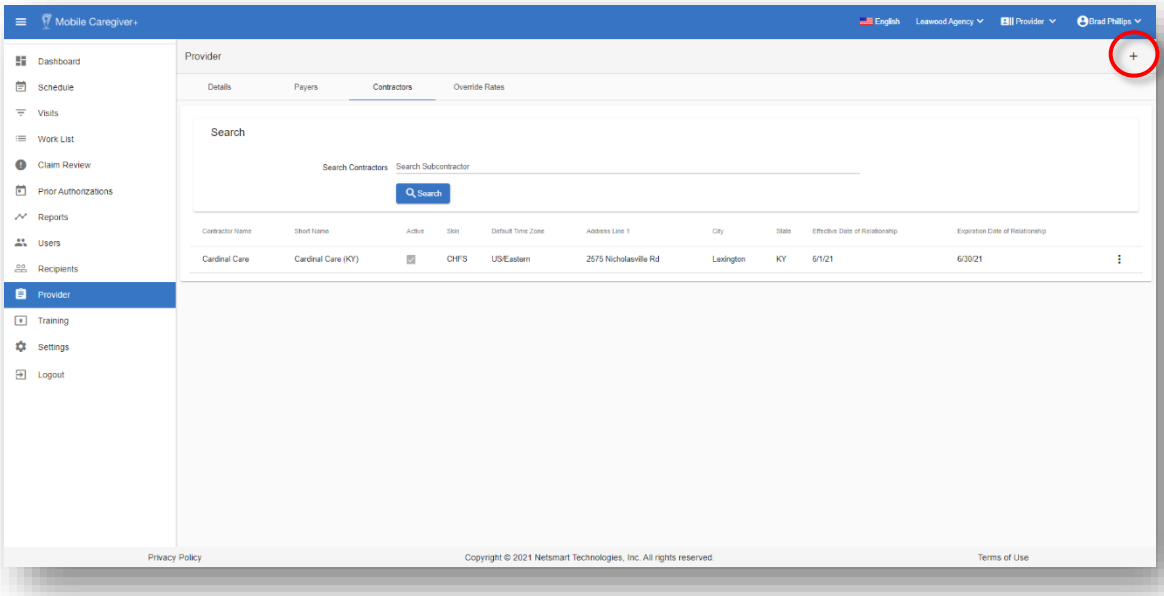
Note: You can only link to Contractors (Providers) that already exist in the Mobile Caregiver+ system.

To link your agency with a Contractor:

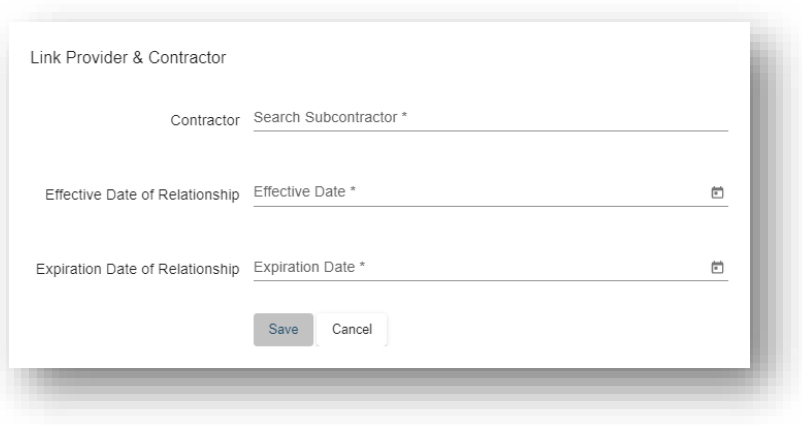
1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Provider** option.

3. Click the **Contractors** tab.
4. Click the “plus sign” in the top right corner of the page.



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

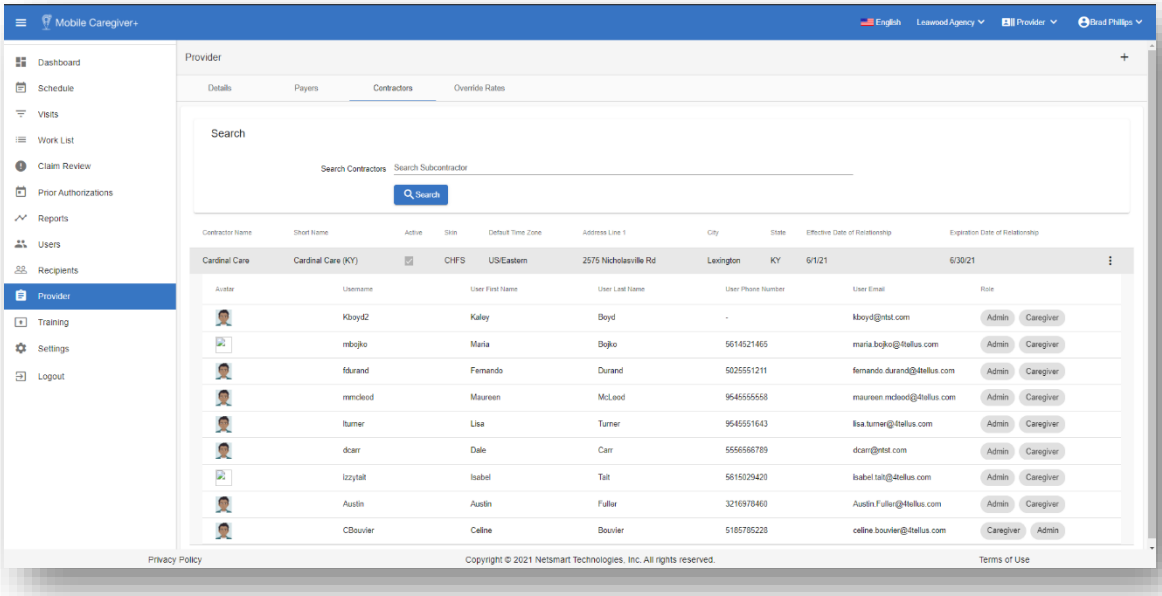


5. Enter the duration of the contract; click the *calendar icon* in the **Effective Date of Relationship** and **Expiration Date of Relationship** fields and select the appropriate dates.

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

6. Click ***Save***.

   The Provider is added to the list of Contractors.



Related Topics

- *Searching for a Provider*
- *Updating Provider Details*
- *Managing Payers*
- *Adding Provider Override Rates*

Deleting a Contractor

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Contractors* > Deleting a Contractor

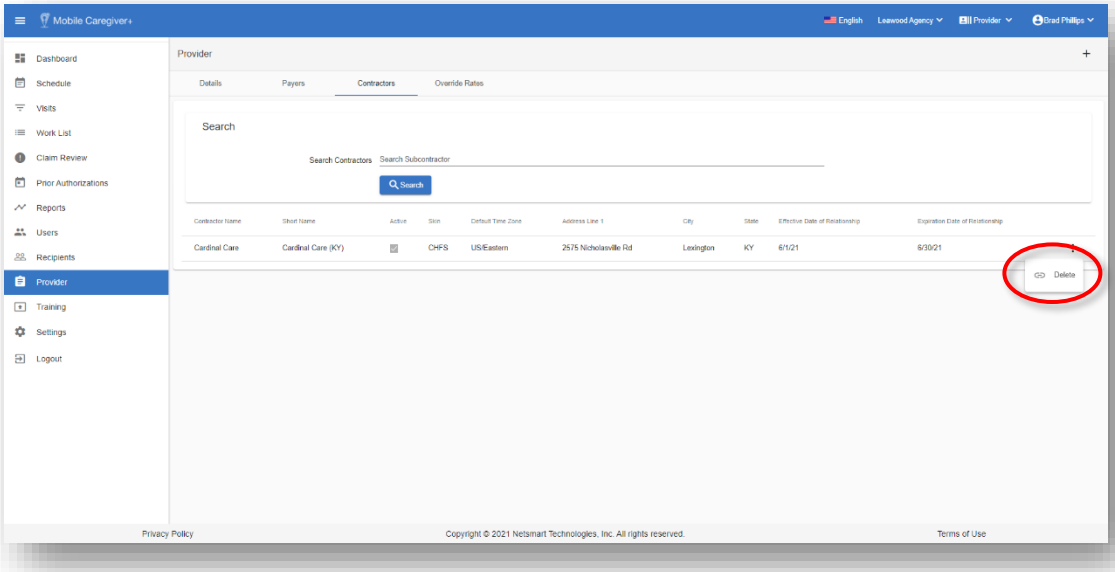
You can delete a Contractor at any time; when you do, they will no longer have access to your Recipients and can no longer schedule visits for them.

To delete a Contractor

1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
8. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Provider** option.

9. Click the **Contractors** tab.
10. Click submenu (vertical dots) to the right of the Contractor you want to remove and then select ***Delete.***



Related Topics

- *Searching for a Provider Agency*
- *Updating Provider Agency Details*
- *Managing Payers*
- *Updating Provider Details*
- *Overriding Payer Rates*

Managing Payer Override Rates

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > Managing Payer Override Rates

In his section you will find information about:

- *Searching for a Specific Payer Override Rate*
- *Adding a Payer Override Rate*
- *Updating a Payer Override Rate*
- *Restoring a Payer Override Rate*
- *Deleting a Payer Override Rate*

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

Searching for a Specific Payer Override Rate

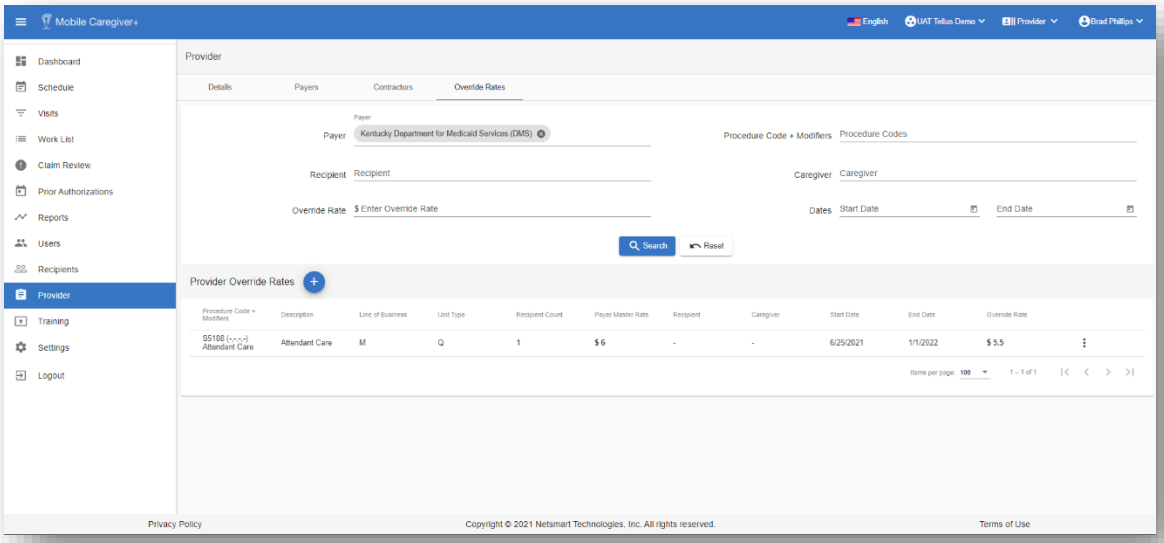
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Payer Override Rates* > Searching for a Specific Payer Override Rate

To find a Payer Override Rate:

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

Click the **Provider** option.

3. Click the **Override Rates** tab.



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

6. Click ***Search***.
7. You may have to scroll down to see the entire list of results.

Adding a Payer Override Rate

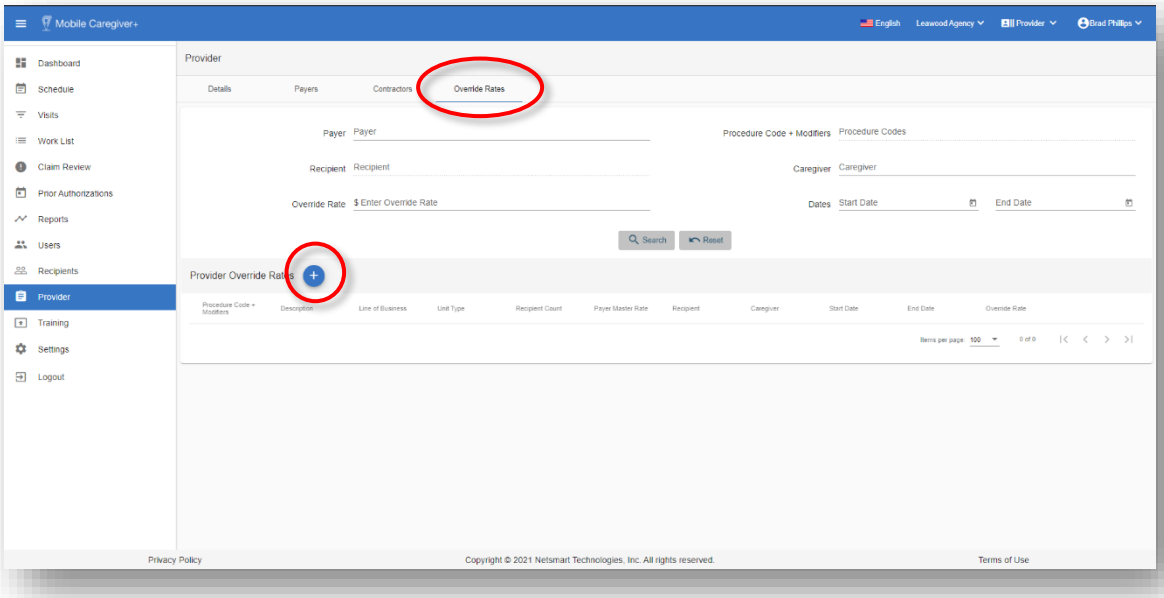
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Payer Override Rates* > Adding a Payer Override Rate

To add an override rate:

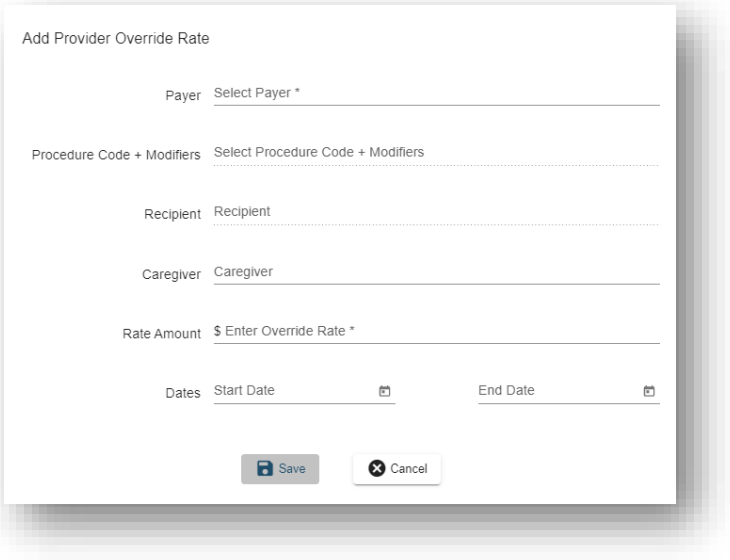
1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Provider** option.

3. Click the **Override Rates** tab.



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



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

Updating a Payer Override Rate

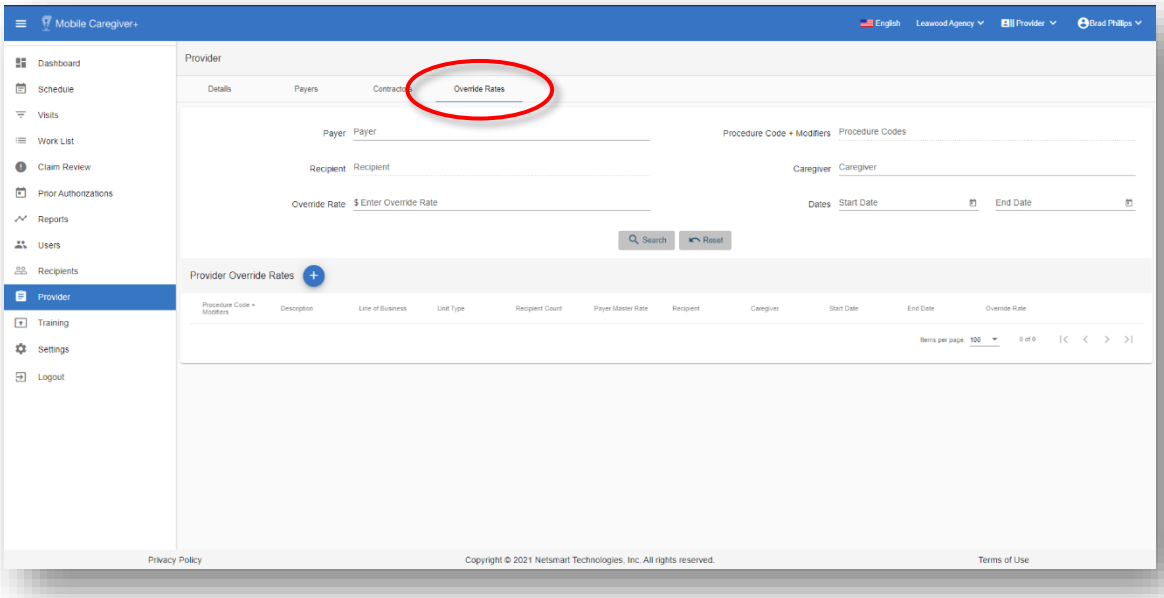
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Payer Override Rates* > Updating a Payer Override Rate

To update a Payer Override Rate:

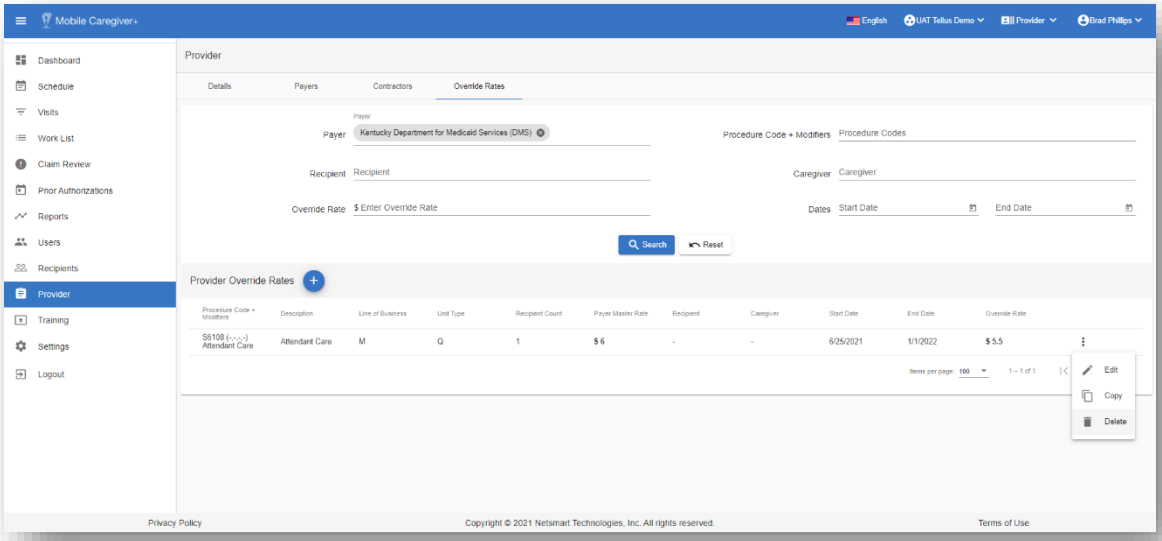
1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Provider** option.

3. Click the **Override Rates** tab.



4. *Search for the override rate* you want to update.
5. When results display, click the line for the override rate you want to update.



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

Restoring a Payer Override Rate

You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Payer Override Rates* > Restoring a Payer Override Rate

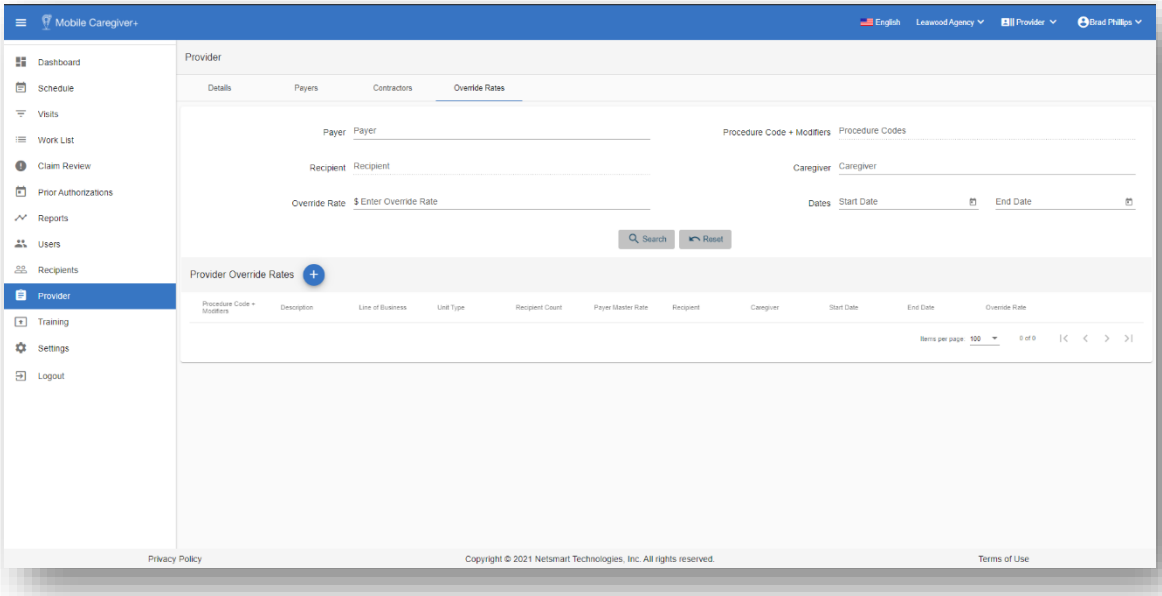
Override rates have a start and end date and are only applied to claims for visits that occur during that time. After the end date, the override rate expires, and Mobile Caregiver+ applies the original billing rate to the service.

You can restore an expired override rate:

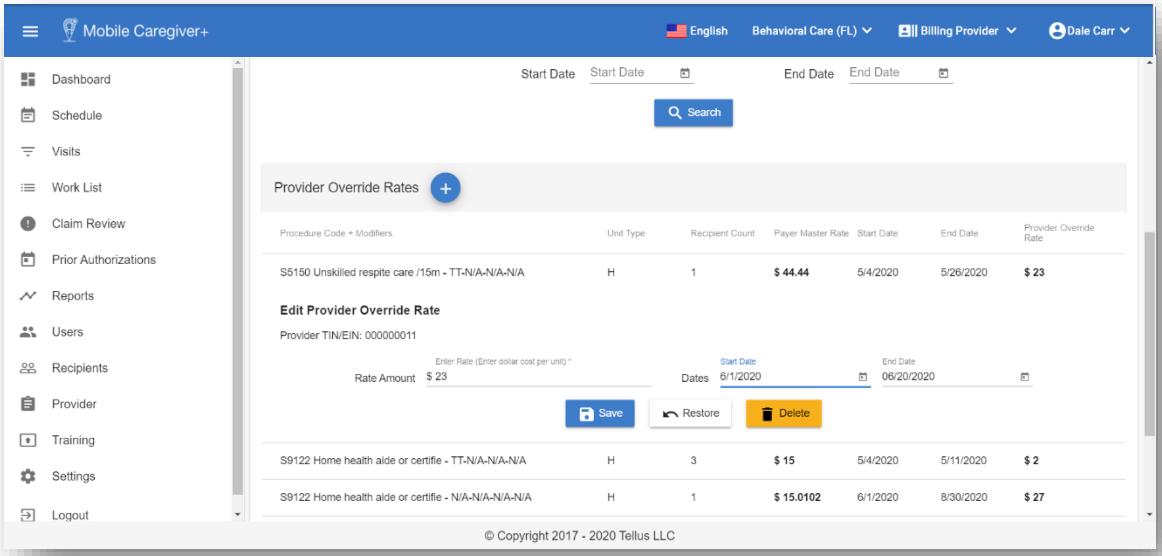
1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Provider** option.

3. Click the **Override Rates** tab.



4. *Search for the override rate* you want to restore.
5. When results display, click the line for the override rate you want to restore.



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

Deleting a Payer Override Rate

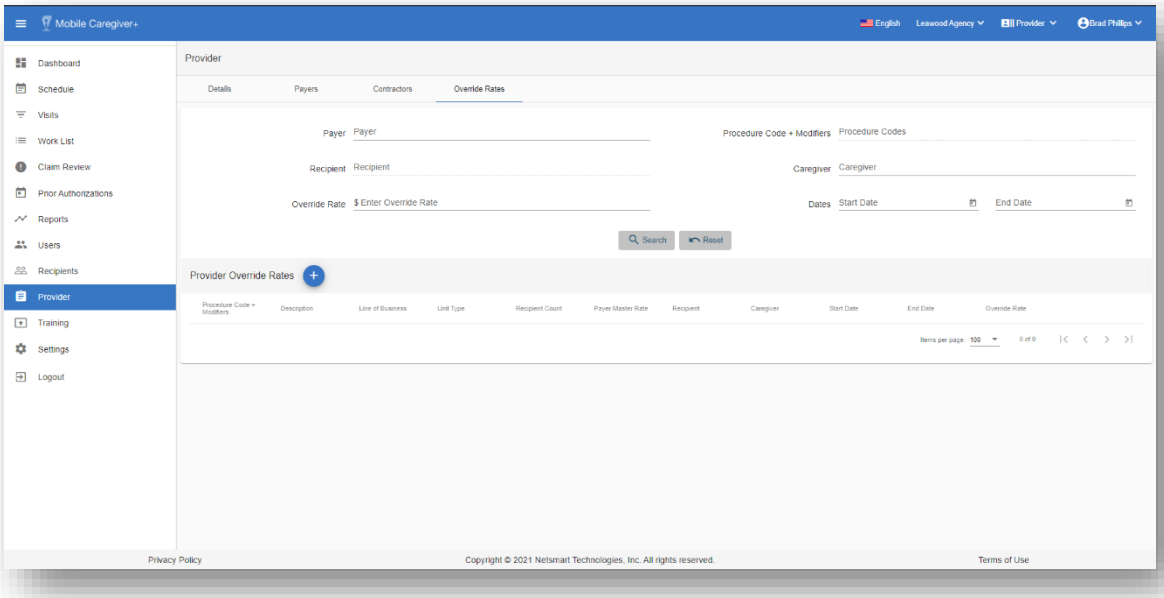
You are here: *Mobile Caregiver+ Administrator User Guide* > *Managing Provider Agencies* > *Managing Payer Override Rates* > Deleting a Payer Override Rate

To delete a Payer Override Rate:

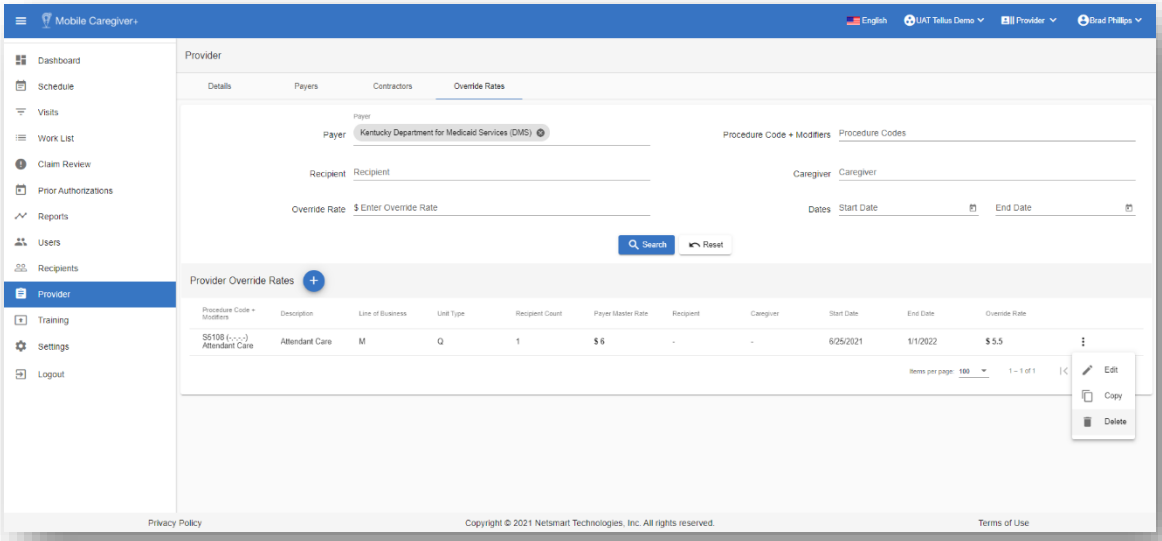
1. If your Provider agency has multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

Click the **Provider** option.

3. Click the **Override Rates** tab.



4. *Search for the override rate* you want to delete.
5. When results display, click the line for the override rate you want to delete.



6. Click ***Delete***.

Related Topics

- *Searching for a Provider*
- *Searching for a Provider Agency*
- *Updating Provider Agency Details*
- *Managing Payers*
- *Managing Contractors*

Reporting

You are here: *Mobile Caregiver+ Administrator User Guide* > Reporting

Click a topic below:

Generating a Report

Exporting a Report

Generating a Report

You are here: *Mobile Caregiver+ Administrator User Guide* > *Reporting* > Generating a Report

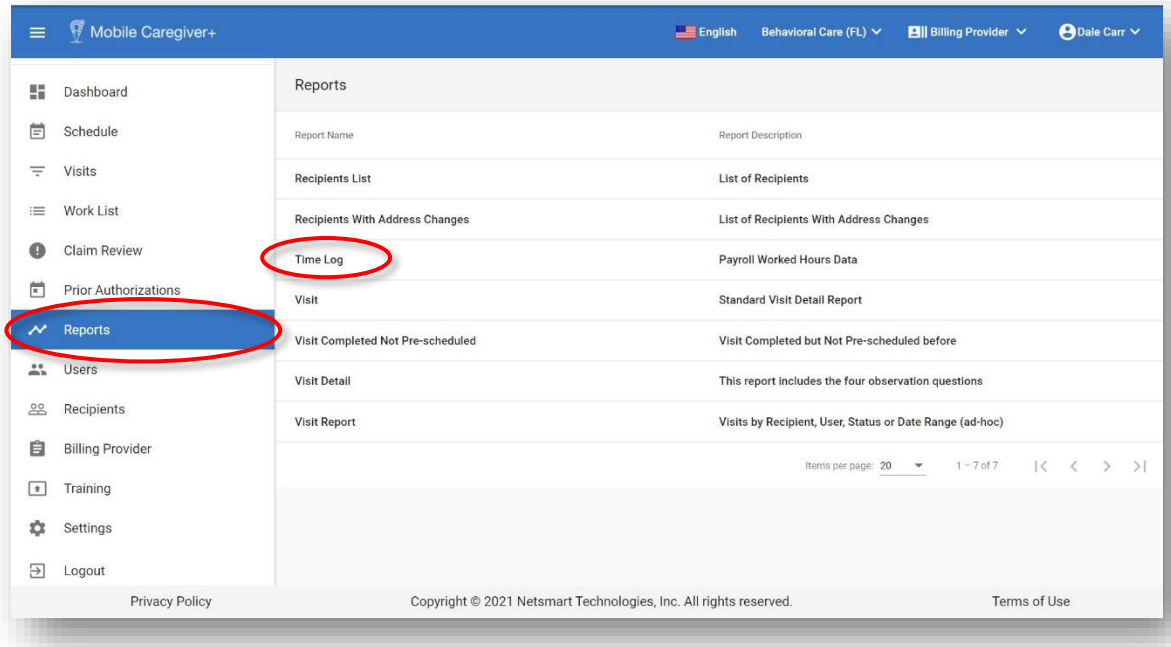
The Administrator Console offers several reports, including the Time Log report that gives you a list of hours worked by Caregiver, and the Visit Report that lets you see a list of completed tasks for Recipients (tasks are not shown in Visit Detail).

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

To generate one of the standardized reports:

1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

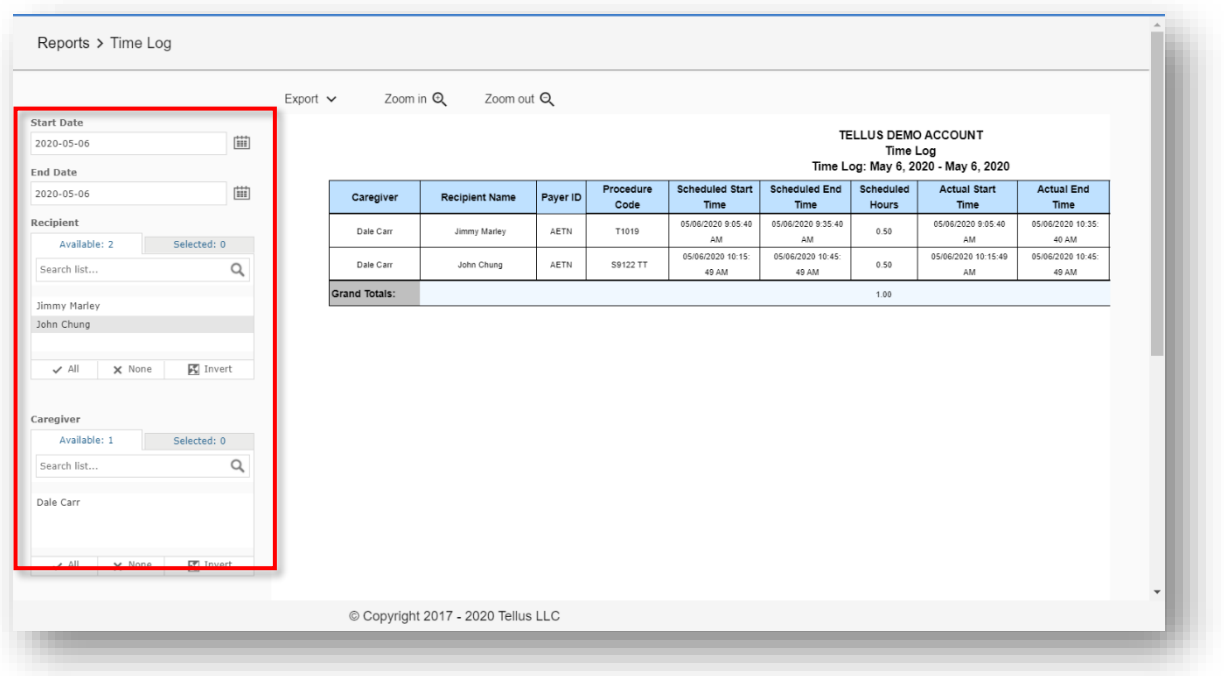
11. Click **Reports**.



12. Click the name of the report you want to generate.

13. When the report displays, you will see filters on the left side of the page.

    You may need to scroll down to see all filters.

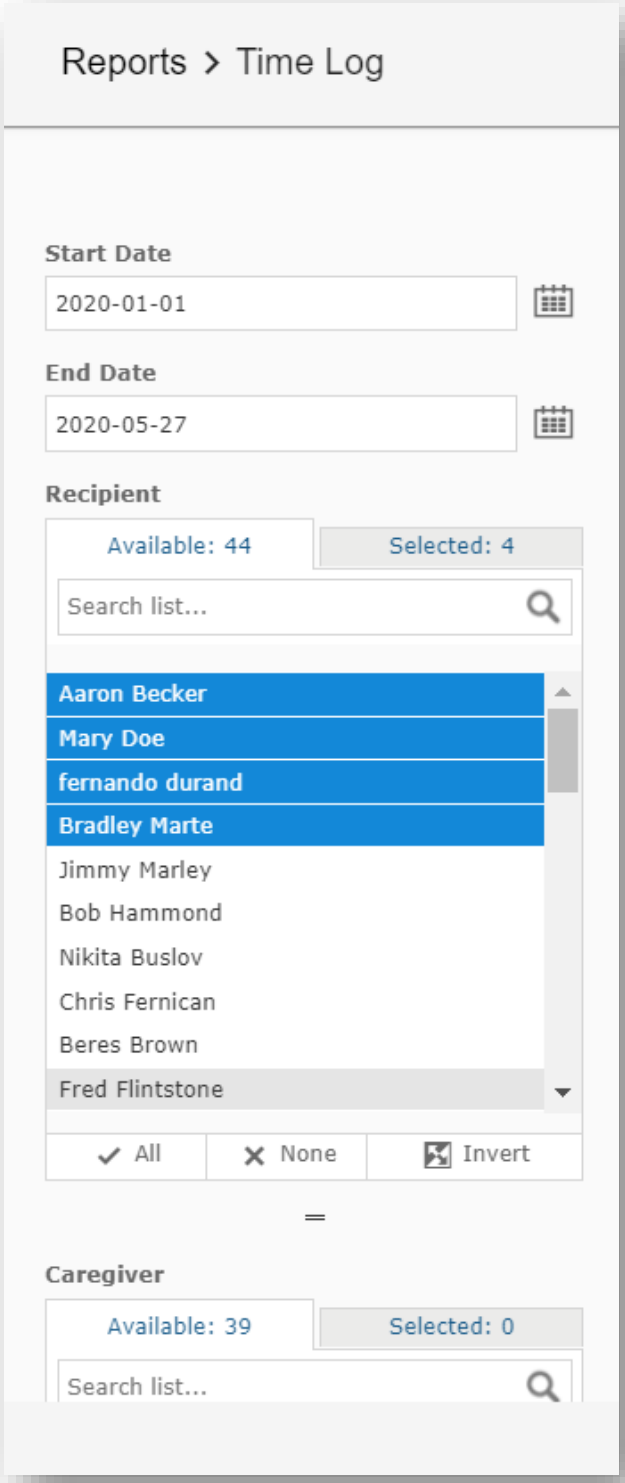


14. Make your entries and selections for any or all of the available filters.

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

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

15. After making all your entries and selections, click ***Apply***.



16. 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	Zoom in to enlarge report.
Zoom out	Zoom out to reduce size of report.
Page 2 of 36	See the number of the page displayed as well as the total number of pages in the report.
	Return to the first page of the report.
	Move back one page.
	Move forward one page.
	Move to last page of the report.

Related Topic

- *Exporting a Report*

Exporting a Report

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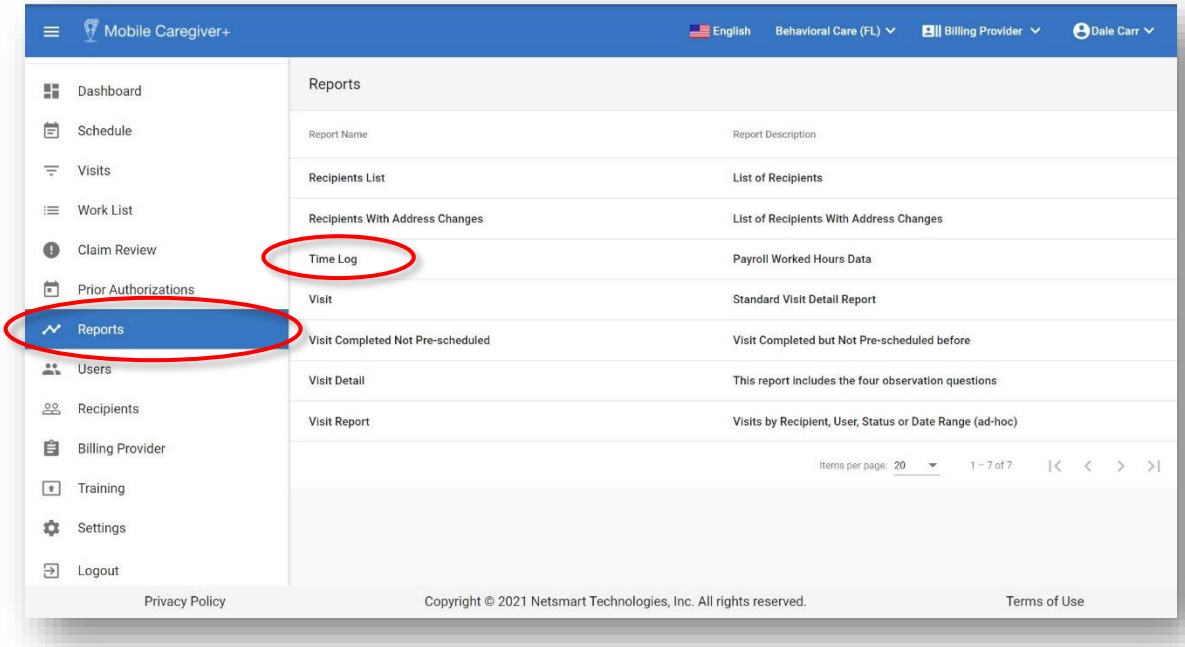
To generate one of the standardized reports:

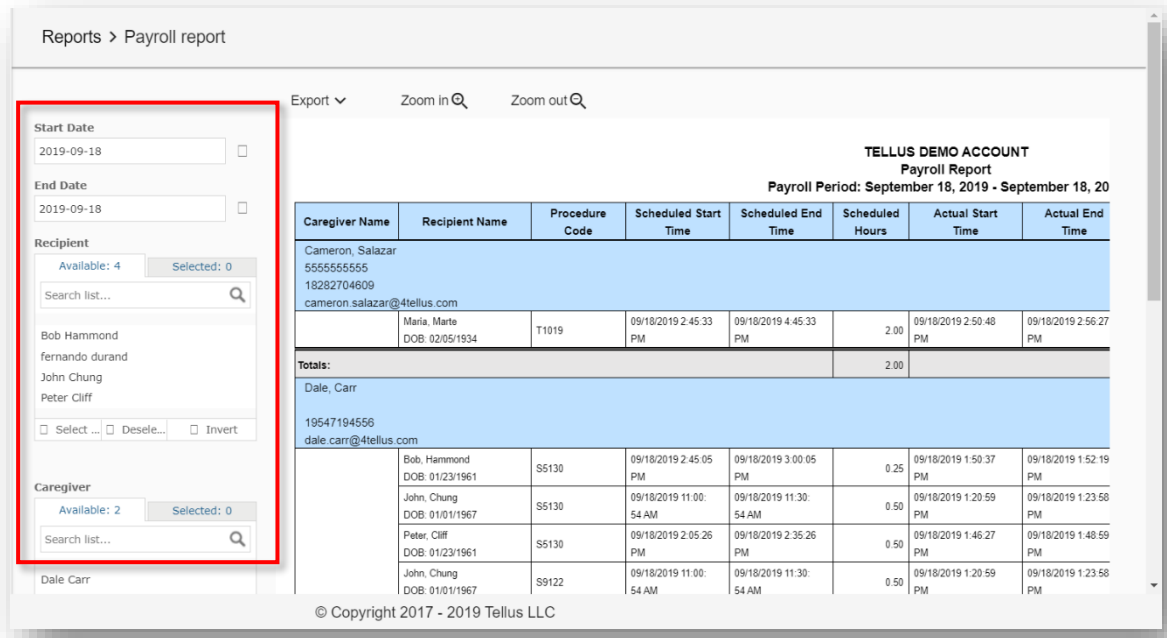
1. Expand the **Main Menu.** (See *Viewing the Main Menu* for more information).

17. Click **Reports**.

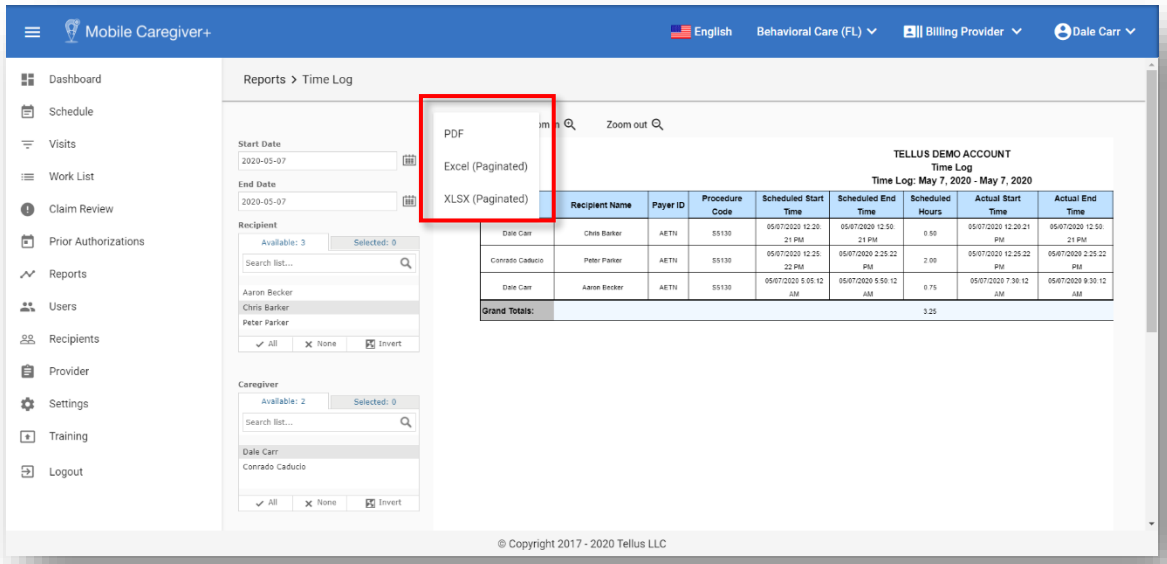
18. Click the name of the report you want to generate.



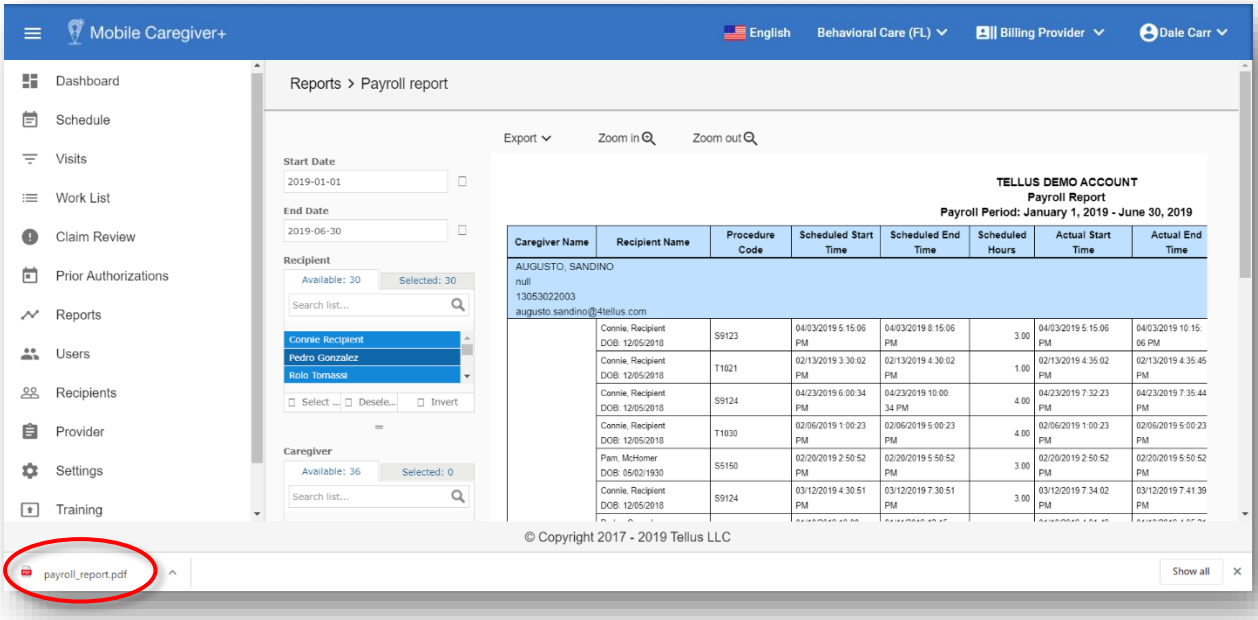
19. Use the filters to *select the data* you want included on your report and then click ***Apply***.



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



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



22. Click the download indicator to open the report.

Related Topic

- *Generating a Report*