# CDAC MOBILE APPLICATION CHECK-IN AND CHECK-OUT GUIDE

OVERVIEW

The CareBridge mobile application is available to Caregivers and can be downloaded from the App Store or the Google Play store. If you need help with downloading the app, please refer to the Mobile Application Download and Login Guide in the CareBridge Resource Library. The instructions below will tell you how to Check-In and Check-Out of appointments within the mobile application.

Figure 1. Creating a visit
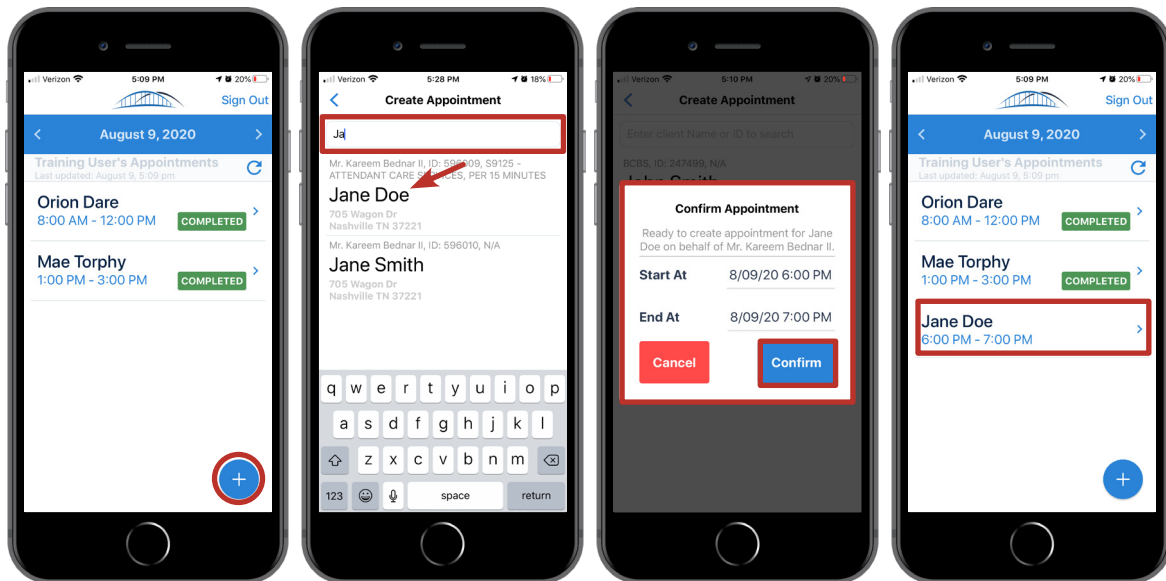
CHECKING INTO A VISIT

After logging in, you will need to create an appointment for the member you are serving.

1. Click on the **+** find the Member's name and Service Code.
2. Click on the **Member's name**.
3. Enter the start and end time of the appointment.
4. Click **OK** to confirm the appointment.
5. Now you will be able to see the Member on the list.
6. Click on the Member's name and on the next screen, click **NEXT**.
7. Now you can click **CHECK IN** and check into that appointment.
8. Begin the visit activities and return to the Mobile App to **CHECK OUT** at the end of the visit.

Figure 2. Checking into a visit
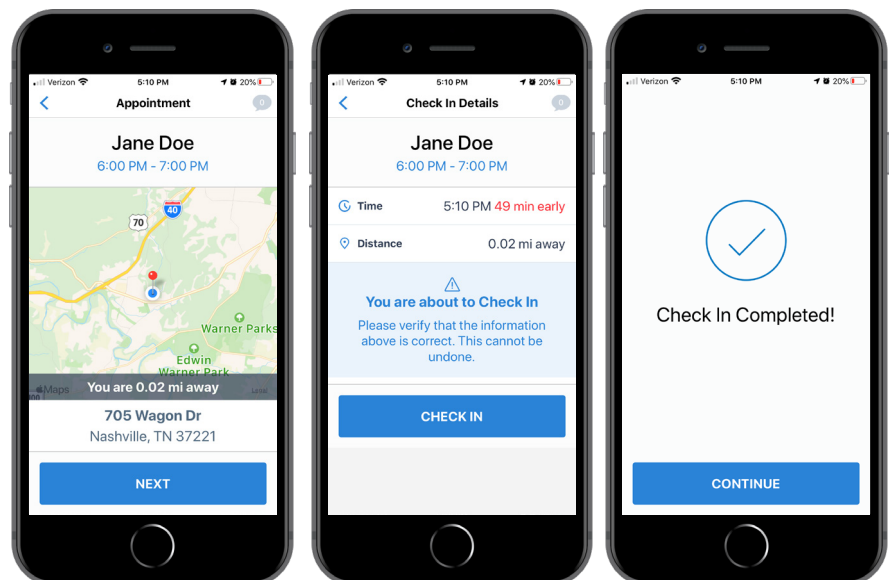
DISCUSSIONS (FIGURE 3)

When checking into the appointment, there is a **speech bubble icon** in the top right. If there is a **number** there, it means there is a Discussion. Discussions are messages from the MCO about the Member. If it is **blue**, it means there is at least one unread comment. You can click on the **icon** to view Discussions. A **blue dot** shows which Discussions have unread comments. You may open and read comments in an existing Discussion by clicking on it.
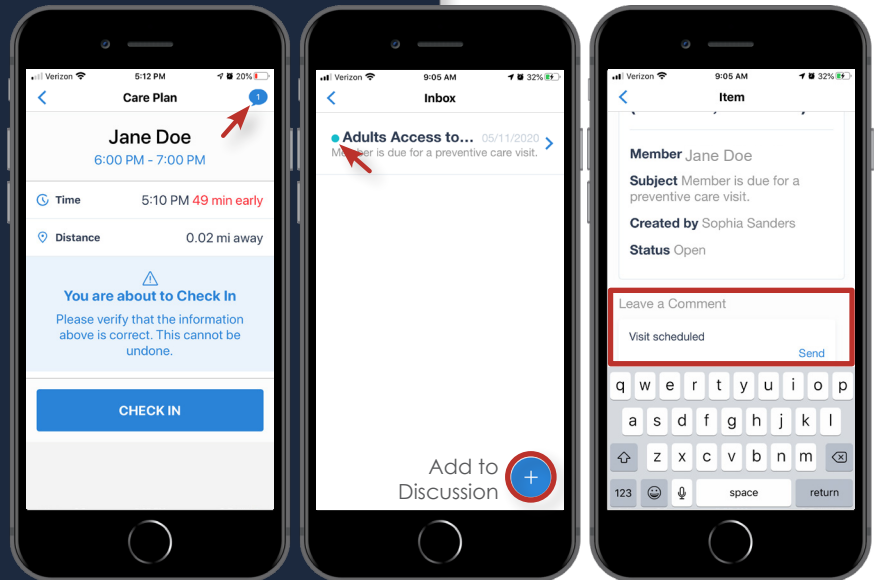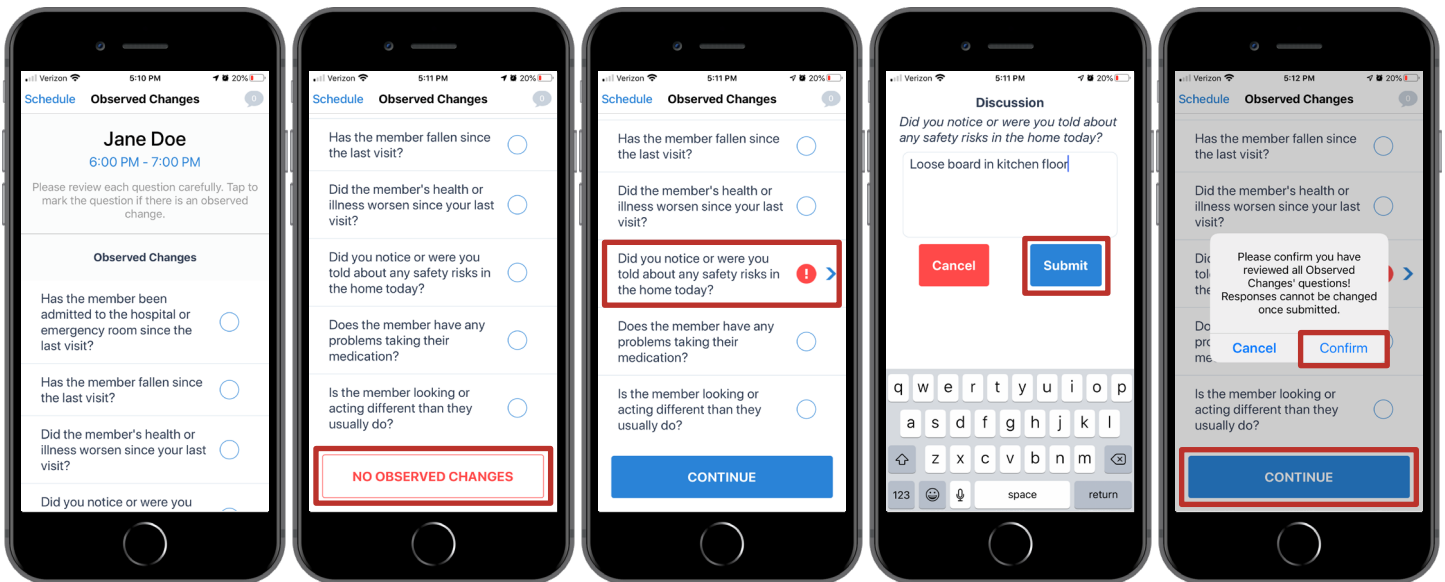
Figure 3. Discussions

OBSERVED CHANGES

Figure 4. Observed Changes

Once you have Checked-In and clicked on **CONTINUE**, the 'Observed Changes' questions list will appear (Figure 4). At this time, begin working the visit and assisting the member. Once you have finished your visit, you will go back to the Mobile App and continue the documenting process. If you noticed any changes in the Member's health since the last visit, you can document them in 'Observed Changes'. If there are no changes, just click **NO OBSERVED CHANGES** then **Confirm**. You must review each question and check any that apply (where the answer is "Yes"), click on the **> sign** to add comments and **Submit**. After you have reviewed all the questions, click **CONTINUE**. You will be asked to confirm that you have reviewed all the Observed Changes questions.

Note: You must report any urgent issues to the MCO immediately just as you would without EVV.

CARE PLAN

After Observed Changes, you will see the Member's 'Care Plan' (Figure 5). The Care Plan activities should be completed at the end of the visit before the Caregiver checks out. To record that you completed activities in the Care Plan, you
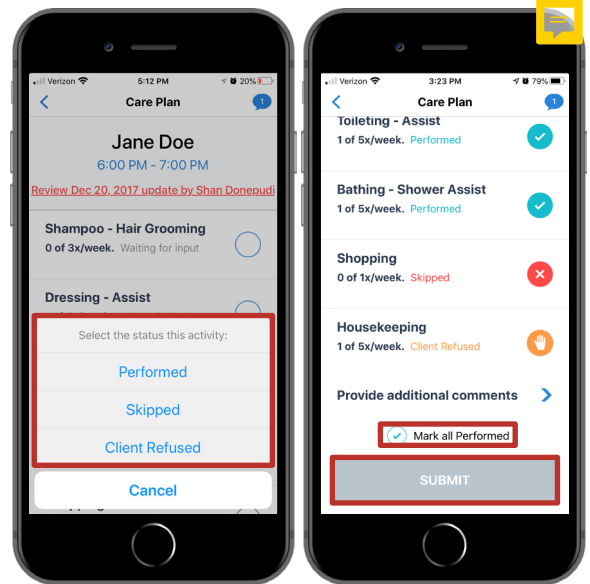
1. **Mark all Performed** ~OR~
2. Choose each task individually and mark them as
   a. **Performed**,
   b. **Skipped**, ~OR~
   c. **Member Refused**

After recording the Care Plan activities, click **SUBMIT**.

If you choose to mark the tasks individually, you will need to mark *each* of them before being able to **SUBMIT** and continue. You can always update any individual responses before clicking **SUBMIT**. You can also see the frequency for each task and track how many tasks have been completed.

Figure 5. Care Plan

CHECKING OUT OF A VISIT

After completing the Care Plan, you will see the Check-Out screen along with the completed Care Plan tasks and Observed Changes questions (Figure 6).
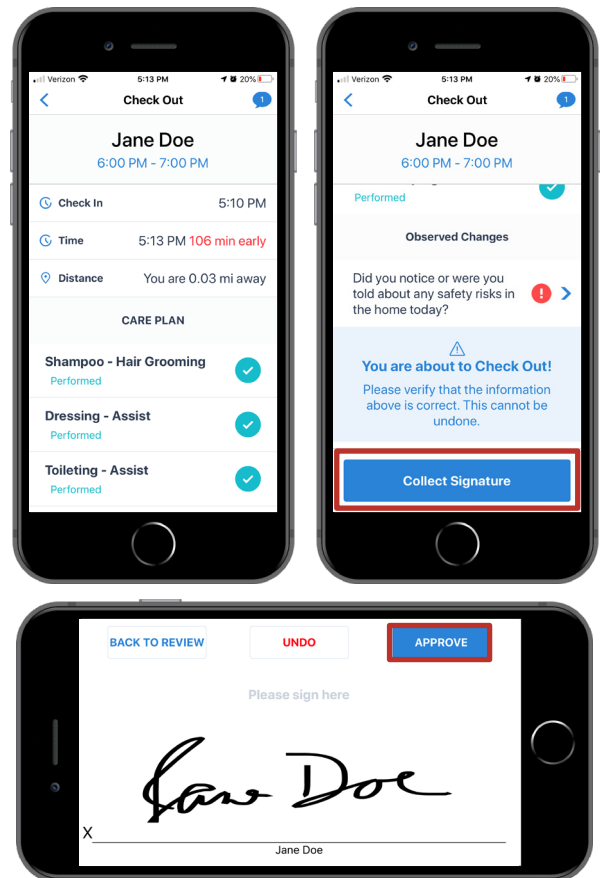
1. Review to make sure everything is right.
2. Click the **Collect Signature** button.
3. After the Member signs, click **APPROVE**.

If a Member can't sign, you can click on the **APPROVE** button and provide a reason for not collecting the signature. Now you have completed the visit and will return to the appointment screen. .

Figure 6. Checking out

MANUAL ENTRY

A manual entry must be completed if you need to fix or add visit information. Manual entries can be used to fix or add dates of service, Check-In and Check-Out times. If you forgot to Check-In and Check-Out of a visit you will have to create the visit when you remember, then follow the steps below to make the needed corrections.

To complete a manual entry:

1. Find the visit you need to fix.

   a. After you login to the mobile app, click the **< arrow** along the date bar at the top of the screen (Figure 7).

   b. Now you will see a list of past appointments.

2. Click on the visit you need to correct.

3. Click the **pencil icon** to the right of the Check-In or Check-Out time.

4. Click on the date and time.

5. The **Pick a date** box will appear.

6. Select the correct date of service and/or fix the time.

7. Click **Confirm**.

8. If you want to leave a note, you can tap in the **Notes** box and write any detail you feel is necessary.

9. Click **Send** at the top right corner of the screen.

10. Select the **reason** why the manual entry was needed The Manual Entry reason is required for visit to bill (Figure 8).

11. You have now completed your manual entry and can sign out of the Mobile App by clicking **Sign Out** at the top right corner of the screen.
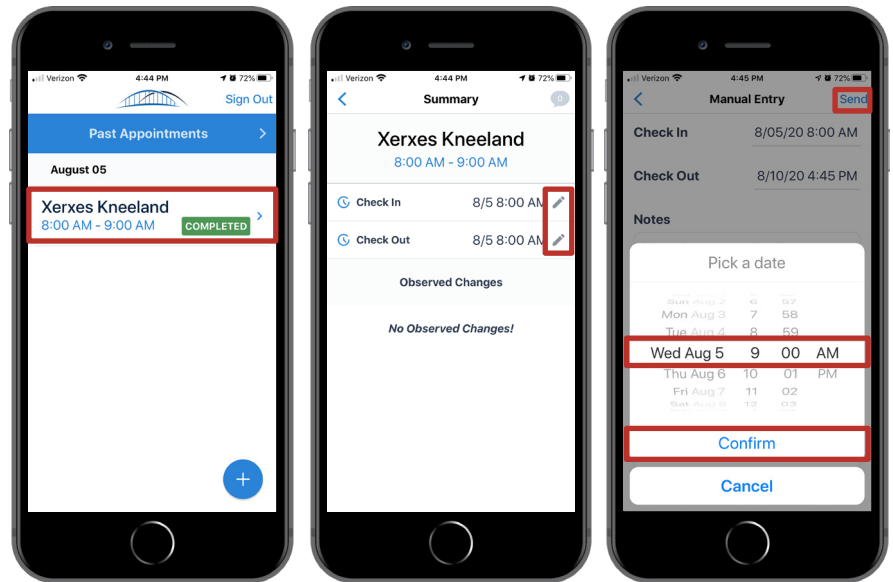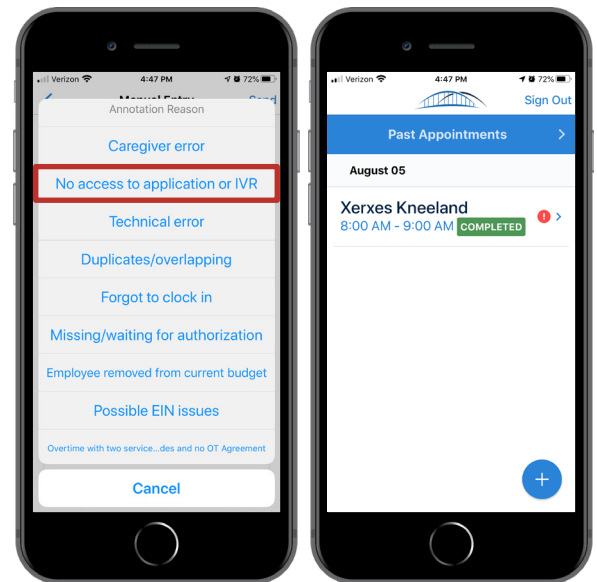

Figure 7. Manual Entry 1-7

Figure 8. Manual Entry 10-11

BILLING VISITS

Completed visits will automatically be billed from the Mobile App. Each time you login to the mobile application, it is good practice to check and make sure there were no billing errors on your visits. To do this, after you login click on the **< arrow** in the date bar at the top of the screen (Figure 9). This will take you to past appointments. If there are pre-billing issues, you will see an exclamation point in a red circle on the right side of the screen in the completed visit. If you see this:

Figure 9. Billing visits

1. Click on the **visit**.

2. Read the billing error reason.

3. If you are able to correct the issue, make the correction.

4. If you are not able to correct the issues, call the MCO.

Pre-billing error reasons:

- **Visit hours exceed max authorized units.**
  - To fix this you can change the times worked to come within the authorized units or call the MCO if an authorization change is needed.

- **Member is not eligible for services during visit time.**
  - Call the MCO to resolve.

- **Visit date is outside authorization dates.**
  - Call the MCO to resolve.

It is important to check for billing errors and correct them. Billing errors that are not fixed may impact your paycheck.

STILL NEED HELP?

If this guide does not answer your questions, please contact the CareBridge Support Center at (844) 343-3653.

The CareBridge Support is available Monday – Friday from 7 AM to 5 PM Central Standard Time.