

WELCOME!

We Specialize in Self-Directed Care
We provide a variety of options for those who self direct their care and services.

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Medicaid Medicare Private Insurance Supporting

If you are internal user, please click [here](#).

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The Consumer Direct Care Network Portal, or CDCN Portal, allows Service Facilitators and External Case Managers to see a participant's service activity and an overview of participant authorizations. They can see when services were performed and how funds/units have been used over time.

Agencies can control which participants service facilitators and external case managers can see in the Portal by managing caseloads.

This guide is about creating case loads, assigning participants and service facilitators to case loads, and managing case load membership.

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Note on Terminology:

Portal roles may be abbreviated in this guide as:

ECM, External Case Manager

SF, Service Facilitator

EOR, Employer of Record

My Dashboard

Case loads can be managed upon logging in to the Portal. My Dashboard shows a list of current case loads, the ability to add or delete case loads, and access to information about participants and service facilitators.

My Dashboard: Overview

Search

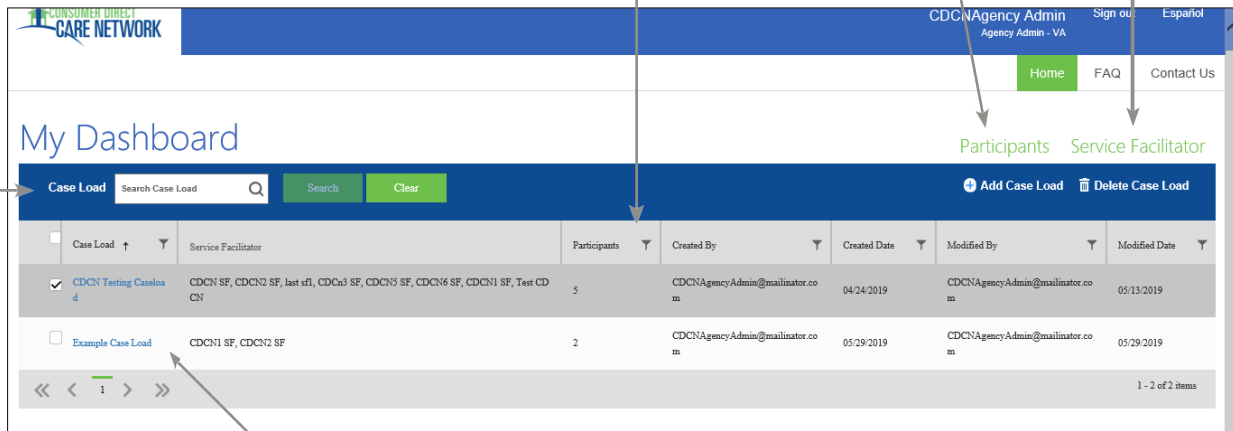
Find a case load by name.

Sort

Sort columns with a filter to quickly find Case Loads.

Participants and Service Facilitators

These links open screens where Participants and Service Facilitators can be found and reviewed. See page 6.



Selecting a Case Load

Case loads can be selected for deletion.

View a Case Load

Click the case load name to see all participants and service facilitators in it and to make changes to membership.

Add and Delete Case Load

A new case load can be created any time. To delete a case load, it must be selected.

Adding a Case Load

See also *Editing a Case Load*, on page 5.

Steps to create a case load:

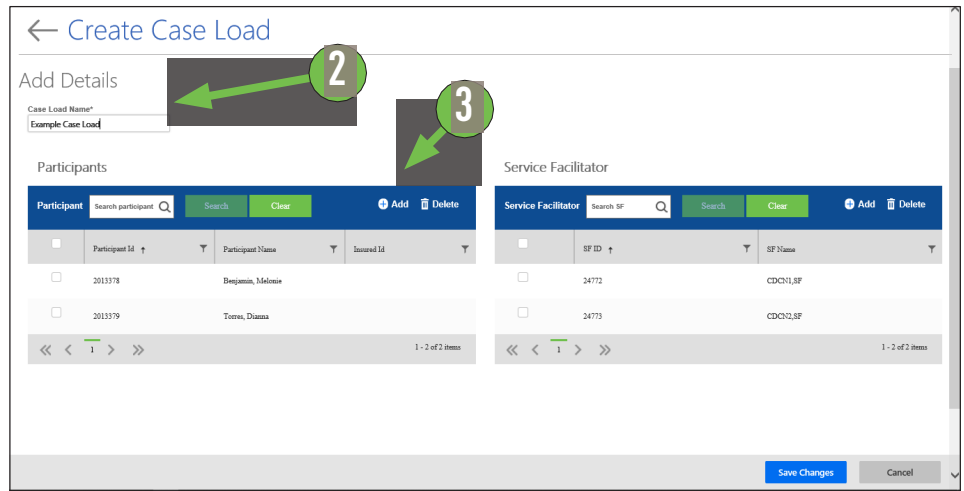
1 **Dashboard.** This opens a Create Case Load window.



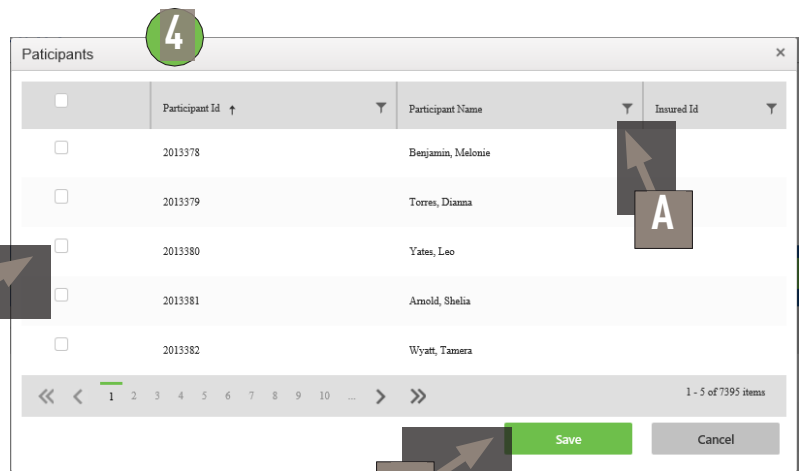
2 Enter a name for the Case Load.

3 Click the **Add** button in the participants list to find participants to include in the case load.

4 Select participants to add to the case load:



- A.** Filter to fine tune the list by Name or Insured ID (Medicaid ID).
- B.** Checkmark the participant to add.
- C.** Repeat A & B for all participants to be added to the case load.
- D.** Click the **Save** button.



The next step is to choose and add service facilitators to the case load. This step is on the next page.

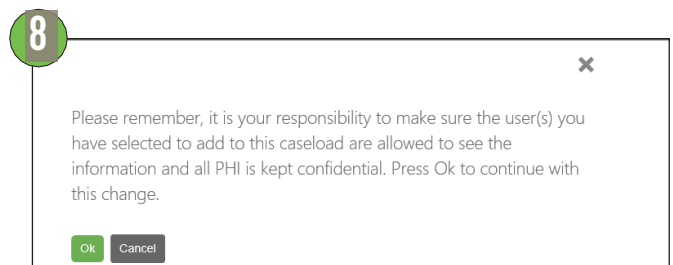
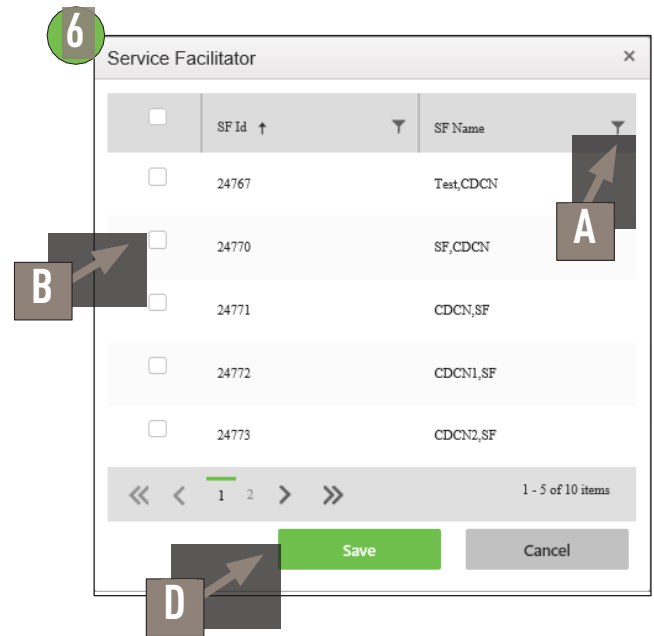
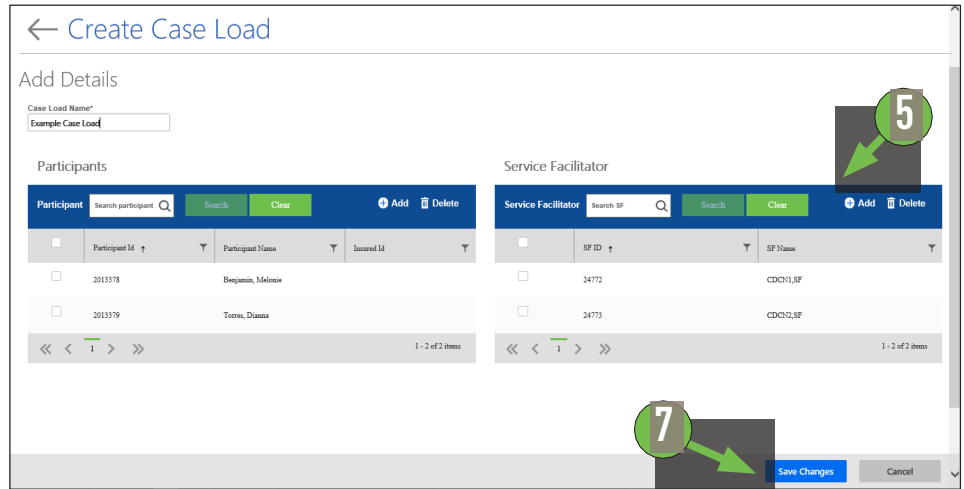
Creating a Case Load, cont.

- 5 Click the **Add** button in the service facilitators list. This shows a list of service facilitators.

- 6 Select service facilitators:
 - A. Filter to fine tune the list by Name or SF ID.
 - B. Checkmark the service facilitator to add.
 - C. Repeat A & B for all service facilitators to be added to the case load.
 - D. Click the **Save** button.

- 7 After participants and service facilitators have been added to the case load, click **Save Changes**.

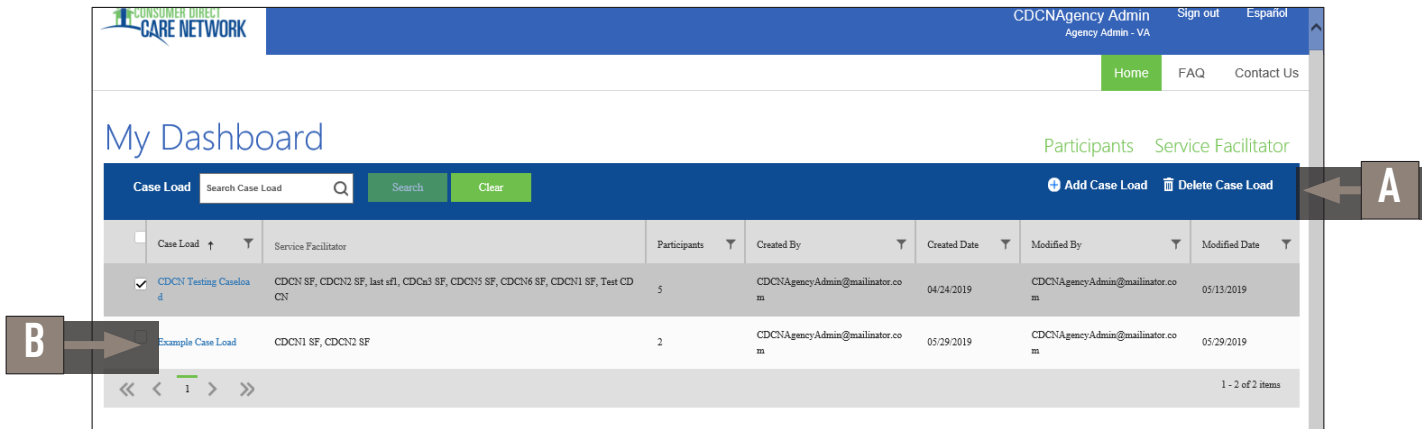
- 8 A reminder pops up that it is your responsibility to make sure the users (service facilitators) are allowed to see Protected Health Information. Click **OK** if you wish to continue with changes made.



Editing a Case Load

You can add or remove people to a current case load. You can also delete an entire case load.

To make changes to a case load, first find the Case Load from **My Dashboard**. Filter and sort can speed things up.



To Delete a Case Load:

In the My Dashboard window, checkmark the case load you wish to delete. Then click the Delete Case Load button ^(A).

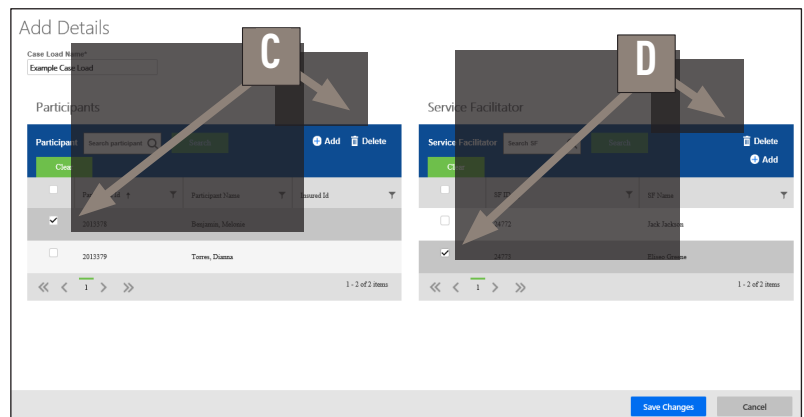
To Add Participants or Service Facilitators to a Case Load:

In the My Dashboard window, click the name of the case load ^(B) you wish to change. Then add people using the steps on pages 3 & 4. click **Save Changes** when done.

To Remove Participants or Service Facilitators to a Case Load:

In the My Dashboard window, click the name of the case load from the My Dashboard window ^(B). This opens the case load. Checkmark the participant(s) to remove and click **Delete** ^(C). Checkmark the service facilitator(s) to remove and click **Delete** ^(D).

Then click **Save Changes**.



My Participant Dashboard

Information about participants can be seen by clicking the **Participants** link from the Portal home (My Dashboard).

My Participant Dashboard: Overview

This dashboard contains information about participants. Once a participant is chosen, you can see additional details about them. This includes the employees who work with them, the employer of record, and spending/utilization reports.

Filter
Filtering lets you fine tune results from the Participant list, such as looking for a participant by their Insured ID (**Medicaid ID**).

Search
Find a participant by name CDCN ID.

Sort
You can sort any column by clicking its title.

My Participant Dashboard

Search Participant ID/Name [Search] [Clear]

Participant Id ↑	Participant	Insured Id	Case Load	Service Facilitator
2013378	Benjamin, Melonie		Example Case Load	CDCN1,SF, CDCN2,SF
2013379	Torres, Dianna		Example Case Load	CDCN1,SF, CDCN2,SF
2013386	Kirk, Simone			
2013387	Hayes, Lucinda			

« < 1 2 3 4 5 6 7 8 9 10 ... > » 1 - 10 of 7400 items

See More Results
Navigate back and forward through results here.

View Participant Details
Click the participant's name to view their information.

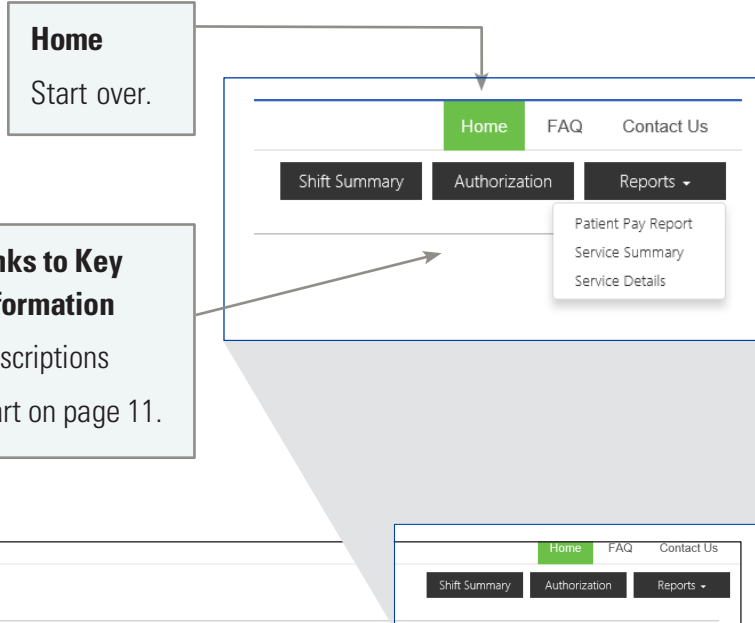
Case Load and Service Facilitators
Clicking these shows details about a case load or service facilitator.

Participant Details

Participant Details: Overview

Once a Participant is chosen from **My Participant Dashboard**, you'll see information about them, including Demographics and Contact Data. You will also see a list of employees, and can open their shift details and rates of pay.

The upper right area of the window leads to key information like **Authorizations, Reports, and Shift Summaries**.



General Information
Such as name, CDCN ID, Birthdate, Insured ID.

Demographics
Such as address, phone number, email address.

Employee List
A list of Employees who perform services for the participant. Click their name to see details. Shift Details and Pay Rate are available (see page 5).

← Participant Details

General Information

Name Henry, Karim	Insured Id test	Participant Id 2013373
Birth Date Apr 23, 1993	Social Security Number	Agency CDCNAgency
FIPS Code		

Demographics and Contact Data

Email ID	Cell Phone 2027742691	Address 1
Address 2	Zip	Gender M
City	State	

Employee List

Name ↑	Shift Details	Rates
Ashley, Cliff		
Shelia Arroyo		

Employer of Record List

Name ↑	FEIN	Start Date	End Date
Ayers, Stella	2004643	Jan 04, 2019	Dec 31, 2078

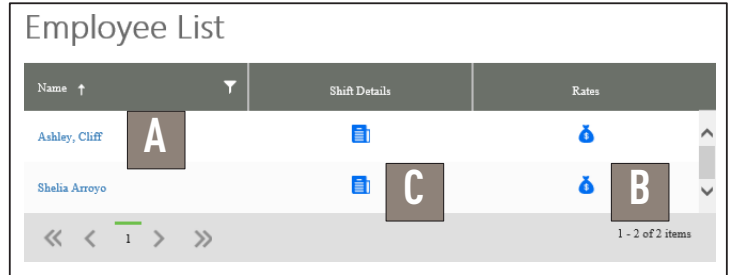
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Employee of Record (EOR) List
A historical list of EORs known by Consumer Direct. Click their name for EOR details (page 6).

Participant Details, Employee Info

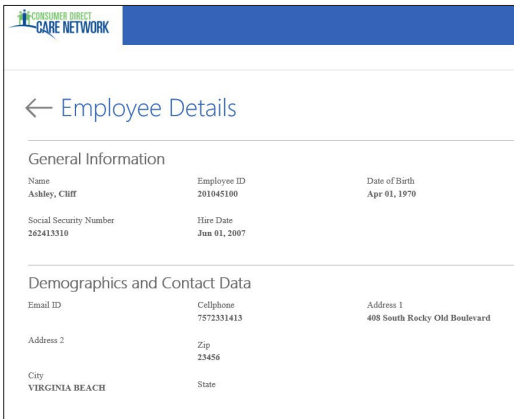
Information about Employees

At the bottom of each participant's detail page is a list of employees. Clicking their name shows information about the employee.



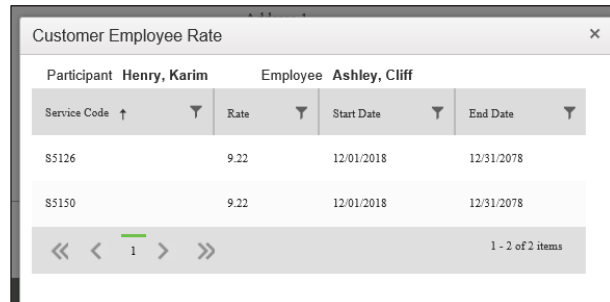
Employee Details (A)

This includes details such as Hire Date, Date of Birth, and Address.



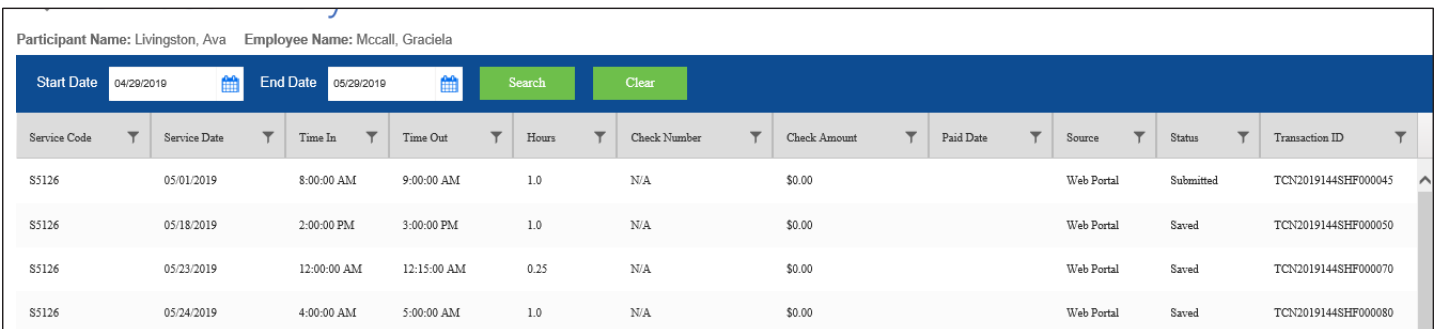
Employee Rate (B)

Shows the Employee's pay rates by Service Code.



Shift Summary (C)

Shifts performed by the employee for the participant are listed one by one. Each includes both the date and time of service. Change the date range to view past shifts (up to a 30-day span).



Participant Details, Employer Info

Information about Employers

At the bottom of each participant's detail page is a list of employers of record. Click the employer's name to see more information about them.

Employer of Record List

Name ↑	FEIN	Start Date	End Date
Ayers , Stella	2004643	Jan 04, 2019	Dec 31, 2078

« < 1 > » 1 - 1 of 1 items

Employer Details

Employer Details shows more about the employer, such as address, name, Employer ID and FEIN Number.

← Employer Details

General Information

Name	Employee ID
Ayers , Stella	2004643
FEIN	Social Security Number
2004643	335167207

Demographics and Contact Data

Email ID	Cell Phone	Address 1
	5408488028	629 South White Old Boulevard
Address 2	ZIP	
	24450	
City	State	
LEXINGTON	Virginia	

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Service Facilitators

Click the **Service Facilitators** link from the Portal home (My Dashboard) to see more information about them. Or click the service facilitator's name in the My Participant Dashboard.

Service Facilitators

The Service Facilitators screen lists all service facilitators, the case loads they belong to, and how many participants the SF can see in the Portal. Note that you can filter and sort some columns just like in My Dashboard.

Service Facilitator
See more about the service facilitator.

Case Loads
Open a Case Load for editing.

Service Facilitators

Service Facilitator

Search
Clear

Service Facilitators ↑	Case Loads	Participants Count
CDCN,SF	CDCN Testing Caseload ,testuat ,tets ,test ,testuat1234	16
CDCN1,SF	CDCN Testing Caseload ,testuat ,tets ,test ,testuat1234 ,Example Case Load	18
CDCN2,SF	CDCN Testing Caseload ,Example Case Load	7
CDCn3,SF	CDCN Testing Caseload	5
CDCN5,SF	Testing Caseload ,CDCN Testing Caseload ,testfinaltest	15

« < 1 2 > »
1 - 5 of 10 items

Service Facilitator Details

The Service Facilitator Details screen shows General Information, Demographics, and Contact Data about the service facilitator.

This includes email address, phone number, and address, if known.

← Service Facilitator Details

General Information

Name Cameron,Steve	Agency TestAgency
------------------------------	-----------------------------

Demographics and Contact Data

Email ID SFCDM@mailinator.com	Cell Phone	Address 1 608 East Fabien Street
Address 2	Zip 23320	
City CHESAPEAKE	State Virginia	

Reports, Summaries, and Authorizations

This section covers information that can be found from the top right corner of the Participant Detail screen.

Shift Summary:

Shows services performed for a participant by date and time. It starts with shifts from the past 30-days, but any date range up to 30-days can be chosen.

Authorization

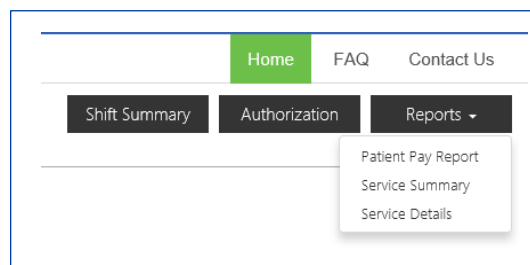
Lists all authorizations and agreements by service code. Displays units/funds available and utilized.

Service Summary

An overview of each authorized service, units/funds used to date, and remaining units/funds available.

Service Details

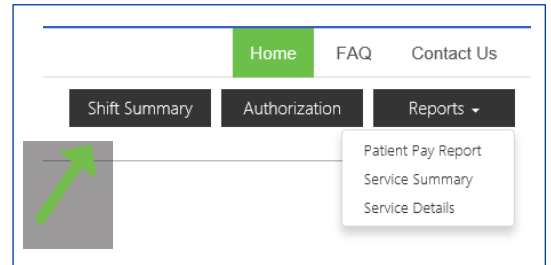
Lists services performed for the Participant in the past month. Includes Service Code, Date of Service, and pay details.



Shift Summary

Shift Summaries are found by clicking the Shift Summary button in the top right corner of a Participant Detail screen. This opens a Shift Summary screen.

This summary shows all services performed for a participant by Service, Date, and Time. It starts with shifts from the past 30-days, but any date range up to 30-days can be chosen.



Back Arrow
Returns to the Participant Detail screen.

Search
Search for any date range up to 30 days at a time.

Filter
Fields can be filtered to find specific shifts.

Fields
Includes Employee information, details about their service and pay.

Navigate Results
Use the navigation tools to see more results.

← Shift Summary

Participant Name: Livingston, Ava

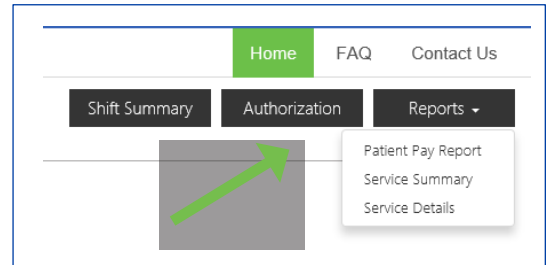
Start Date: 04/29/2019 End Date: 05/29/2019 Search Clear

Employee Name	Employee ID	Service Code	Service Date	Time In	Time Out	Hours	Check Number	Check Amount	Paid Date	Source	Status
Rhodes, Cornell	2021514	SS126	05/09/2019	12:00:00 AM	12:05:00 AM	0.08	N/A	\$0.00		Web Portal	Saved
Rhodes, Cornell	2021514	SS126	05/10/2019	12:00:00 AM	12:15:00 AM	0.25	N/A	\$0.00		Web Portal	Saved
Rhodes, Cornell	2021514	SS126	05/01/2019	8:00:00 AM	9:00:00 AM	1.0	N/A	\$0.00		Web Portal	Saved
Rhodes, Cornell	2021514	SS126	05/01/2019	9:00:00 AM	10:00:00 AM	1.0	N/A	\$0.00		Web Portal	Saved
Mccall, Graciela	2055158	SS126	05/01/2019	8:00:00 AM	9:00:00 AM	1.0	N/A	\$0.00		Web Portal	Submitted

1 - 5 of 14 items

Authorizations & Agreements

Learn more about a participant's authorization(s). Clicking the Authorization button in the top right corner of a Participant Detail screen opens the **Authorizations Dashboard**.



Click an authorization to open Agreement Details. This shows more information and an overview of unused units/funds by service code.

Authorizations Dashboard and Agreement Details

Authorizations are listed one by one. Each shows the participant's name, provider, and the date range of the authorization. Fields can be filtered to help find authorizations when there are many to choose from. **Tip:** Filter the Status column to show only active authorizations.

Expand an Auth
Click the arrow to show more details about the Authorization.

View Auth Details
Click the Auth's ACN to see details about the Authorization.

Service Summary
Selecting a Service fills in the blue Service Summary bar. This summarizes available units/funds.

Authorizations Dashboard

Search: Client ID/Name/Agreement No. [Q] Start Date [MMDD/YYYY] [📅] End Date [MMDD/YYYY] [📅] Search [🔍] Clear [🗑️]

>	ACN	Agreement No.	Client ID	Client Name	Date of Birth	Provider	Start Date	End Date	Status										
▼	ACN2019071AU7000070	006863	2013373	Henry, Karim	04/23/1993	VADMASNORTH	04/23/2019	04/24/2019	Active										
<table border="1"> <thead> <tr> <th>Service Code</th> <th>Start Date</th> <th>End Date</th> <th>Authorization no.</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>S5150</td> <td>04/23/2019</td> <td>04/24/2019</td> <td></td> <td>Active</td> </tr> </tbody> </table>										Service Code	Start Date	End Date	Authorization no.	Status	S5150	04/23/2019	04/24/2019		Active
Service Code	Start Date	End Date	Authorization no.	Status															
S5150	04/23/2019	04/24/2019		Active															
>	ACN2019114AU7000001		2013373	Henry, Karim	04/23/1993	VADMASNORTH			Inactive										

Navigation: << < 1 > >> 1 - 2 of 2 items

Agreement Details

Authorization Summary

Client Name: Ava Alanna Livingston | Client ID: 2020336 | DOB: 01/01/1989

Provider: VADMASNORTH | Program: LTB | Sub Account: FEAMCDDMSRCCROS

Agreement No.: 006866 | Diagnosis Code: V61.03 | Start Date: 05/01/2019

Status: Active | External Case Manager | End Date: 12/31/2019

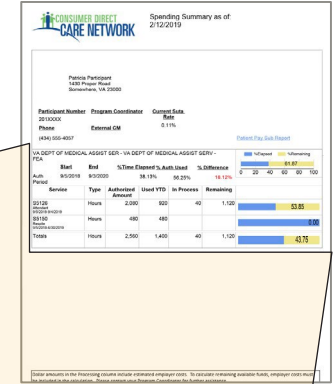
Service Summary

Service	S5126	Budget Amount	500000	Reserved Amount		Remaining Amount	500000	Spent Amount		Refresh		
Service/History	Description	Start Date	End Date	Authorization no.	Status	Hours	Bill Units	Unit Range	Range Units	Budget Amount	Amount Range	PM/PM
S5126	Attendant	05/01/2019	12/31/2019		Active	500000	500000	Daily	2040.82	0		No

Summary Report

A Participant's Summary Report shows each service within an authorization, the amount of services used to date, and remaining funds/units within each service. Values are provided in units/funds as well as percentages.

% Time Elapsed
How much of the authorization period has passed as a percentage. 50% means half-way through the Authorization.



Participant Number	Program Coordinator	Current Suta Rate
201XXXX	External CM	0.11%
Phone	(434) 555-4057	

[Patient Pay Sub Report](#)

Auth Period	Start	End	%Time Elapsed	% Auth Used	% Difference
9/5/2018	9/5/2018	9/3/2020	38.13%	56.25%	18.12%

Service	Type	Authorized Amount	Used YTD	In Process	Remaining
S5126 Attendant 9/5/2018-9/4/2019	Hours	2,080	920	40	1,120
S5150 Respite 9/5/2018-6/30/2019	Hours	480	480		
Totals	Hours	2,560	1,400	40	1,120

Services
Services are listed one by one.

Authorized Amount/Used YTD
The total funds/units in the authorization and the amount used during the Auth Period.

In Process
Committed funds not yet paid.

Graph
A quick way to view the Authorization at a glance.

Detail Report

The Detail report lists each service performed for a participant in the past 30-days. To keep a running list of services, download it regularly.

Payroll and Admin Fees

These fees are in addition to employee pay.

Spending Detail: 4/29/2019 12:00:00 AM - 5/30/2019 12:00:00 AM

Employee	Service Code	Service Date	Pay Period	Pay Date	Pay Units	Pay Rate	Pay Total	Payroll Costs	ADMN Fee	Total Spent	Estimate
.ewis, Larry	S5150	5/16/2019	5/9/2019-5/22/2019	5/31/2019	6	\$9.22	\$55.32	\$0.00	\$0.00	\$61.02	Yes
.ewis, Larry	S5150	5/17/2019	5/9/2019-5/22/2019	5/31/2019	7.5	\$9.22	\$69.15	\$0.00	\$0.00	\$76.28	Yes
.ewis, Larry	S5150	5/18/2019	5/9/2019-5/22/2019	5/31/2019	9.5	\$9.22	\$87.59	\$0.00	\$0.00	\$96.62	Yes
					23		\$212.06	\$0.00	\$0.00	\$233.91	
					23		\$212.06	\$0.00	\$0.00	\$233.91	

Service Details

Includes the who, what, when, and how much of each service delivered.

Totals

The last line adds up each pay and financial column.

Total Spent

The final amount for all services performed in the past 30-days. It adds together the employee's pay, payroll costs, and administrative fees.