

# AuthentiCare®

# Palco New Mexico

## User Guide

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Version 1.0

## Table of Contents

TABLE OF CONTENTS .....	2
DOCUMENT HISTORY.....	4
CHAPTER 1 - GETTING STARTED .....	5
1.1 ESTABLISHING A USER ACCOUNT .....	5
1.2 LOGGING INTO AUTHENTICARE .....	5
1.3 LOGGING OUT OF AUTHENTICARE.....	6
1.4 ADDING NEW AUTHENTICARE WEB USERS .....	7
1.5 DISABLING AN AUTHENTICARE WEB USER.....	9
1.6 CHANGING YOUR PASSWORD .....	10
CHAPTER 2 - NAVIGATING AUTHENTICARE .....	12
2.1 HOME PAGE .....	12
CHAPTER 3 - MANAGING WORKER INFORMATION .....	14
3.1 ADDING A WORKER.....	14
3.2 EDITING WORKERS .....	15
3.3 SUSPENDING / INACTIVATING / END-DATING WORKERS.....	15
CHAPTER 4 - MANAGING CLIENT INFORMATION.....	18
4.1 ADDING CLIENT INFORMATION.....	18
4.2 CLIENT ADDRESS AND PHONE NUMBER .....	19
CHAPTER 5 - CREATING WEB-BASED CLAIMS FOR PAYER REVIEW .....	21
CHAPTER 6 - REPORTS.....	23
6.1 REPORT MENU .....	23
6.2 REPORT DESCRIPTIONS .....	23
6.3 CREATING A REPORT .....	25
6.4 VIEWING REPORTS .....	26

6.5	DELETING A REPORT.....	26
6.6	USING REPORT TEMPLATES.....	27
6.7	SCHEDULING A REPORT .....	29

## Document History

This document is controlled through the Document Management Process.

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December 21, 2020	1.0	First Data	Initial Submission

## Chapter 1 - Getting Started

This chapter is designed to help you begin using AuthentiCare by walking through the provider registration process, adding new users, logging in, logging out, and changing your password.

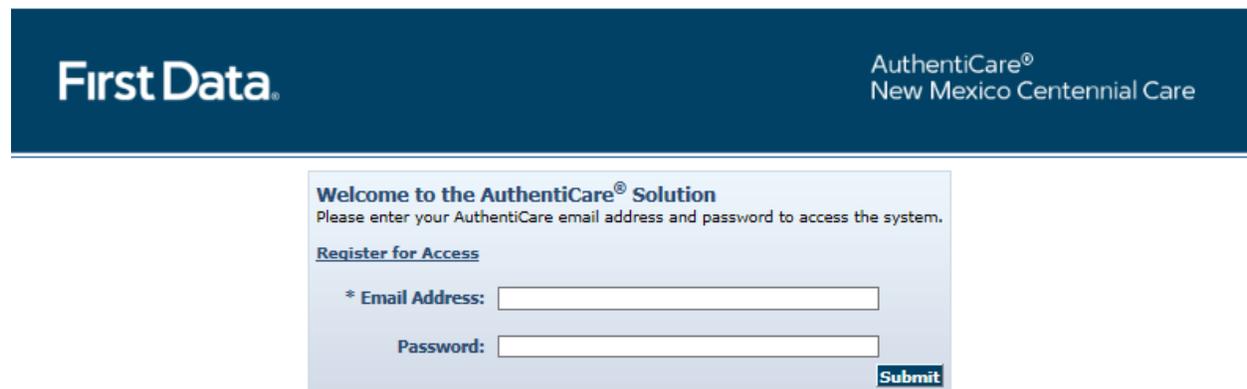
### 1.1 Establishing a User Account

To log into AuthentiCare, you must have a user account which consists of a username (email address) and a password. There are several ways that a user may obtain a username and password.

For all providers, an initial user account for an Administrator user is created by First Data and provided to a manager. Proceed to Section 1.2 for instructions on logging into AuthentiCare. After logging in, the Administrator user can create user accounts for other users for that provider.

### 1.2 Logging Into AuthentiCare

Navigate to the AuthentiCare website at <https://www.authenticare.com/palconm>



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[First Data Privacy Policy](#) [Download Acrobat Reader](#)

1. Enter your AuthentiCare email address and password.
2. Click Submit.

The *Home* page displays and varies in appearance based on the user's role. Your view of the Home page may be different from what is displayed in this User Guide as this is the Provider Administrator's view. From the *Home* page, you can access the functionality available in AuthentiCare.

**First Data®** AuthentiCare®  
Palco New Mexico

Home | Create | Reports | Dashboards | Visits | My Account | Custom Links | Logout Logged in as: alejandro\_palcom@acr.com

### Entities

Add New > [Client](#)  
[Worker](#)

Entity Type >

Search >

**Go!**

### Claims

Add New > [Claim \(Standard\)](#)  
Add New > [Claim \(Express\)](#)

Claim ID:

**Go! Clear**

Claim Status:

Claim Start:

Claim End:

Service:

Authorization ID:

Client:

Provider:

Worker:

Payer:

Procedure Code:

User Option:

Include Inactive Claims?

**Go! Clear**

### Services and Authorizations

Search Type:  Service  
 Authorization

Service:

Authorization ID:

Service Type:

Authorization Start:

Authorization End:

Client:

Provider:

Worker:

Payer:

Service Period:

Procedure Code:

**Go! Clear**

## 1.3 Logging Out of AuthentiCare

For security and privacy reasons, it is important for users to log off AuthentiCare when leaving the work station. After a 15 minute period of inactivity, AuthentiCare automatically logs the user off the system. Select Logout from the Main Menu.

## 1.4 Adding New AuthentiCare Web Users

A provider staff member with the NM\_Provider\_Admin role can create additional user accounts, including another user with the NM\_Provider\_Admin role.

Upon successful completion of logging in, the *Home* page displays.

1. Enter the name of your provider in the Entities Search box.

The screenshot shows a light blue box titled "Entities". Inside, there is a search bar. Above the search bar, it says "Add New > Client Worker" with "Client Worker" in blue and underlined. Below the search bar, there is a dropdown menu for "Entity Type" and a "Search >" label. A blue "Go!" button is located at the bottom right of the search area.

2. Click Go!

The *Provider Entity Settings* page displays with the information about the provider.

The screenshot shows the "Provider Entity Settings" page. It is divided into several sections:

- Provider Entity Settings:** Contains fields for ID (20155999), PIN (\*\*\*\*\*), First Name, Middle Name, Last Name, Company Name (Best Health Agency Inc), SSN, FID (111222333), Gender, Birth Date, Email, Begin Date (01/01/2020), End Date (12/31/2021), Language, Status, Entity Qualifier (Business), NPI (1477506781), Provider Services (Mi Via Homemaker/Direct Support, Mi Via In Home Living Supports, Mi Via Respite, DD Waiver Respite), Taxonomy Code, and Travel Time checkbox.
- Entity Addresses/Phones:** Contains an "Add Address" section with fields for Address Type (Work), Address Line 1, Address Line 2, City (Albuquerque), State (NM), and Zip (871025555). It also has a "Delete" button. Below it is an "Add Phone" section with fields for Phone Type (Work) and Phone Number ((501) 893-9756), with a "Delete" button.
- Registered Users:** Contains an "Add User" button and a table of registered users.
- Holidays / Days Off:** Contains a table for tracking days off.

User Name	Role	Registered On	Enabl
alejandro_palconm@acr.com	NM_Provider_Admin	12/09/2020	<input checked="" type="checkbox"/>
praveen02_palconm@acr.com	NM_Provider_Admin	12/03/2020	<input checked="" type="checkbox"/>

3. Click Add User.



The *Register* page displays.

The screenshot shows a web interface titled "Register". Below the title is a paragraph: "Use your assigned ID and PIN plus your e-mail address and a password you choose to register for access to the website." The form contains the following fields:

- \* Email Address:
- \* Password:
- \* Confirm Password:
- \* User Roles: A dropdown menu with "NM\_Provider\_Admin" selected.
- Rights: A list of permissions including "Add Claims", "Edit Claims", "View Claims", "Delete Claims", "Add Clients", "Edit Clients", "View Clients", "Add Workers", and "Edit Workers".

At the bottom right of the form are two buttons: "Register" and "Cancel".

There can be only one role per email address. When creating a new user account, one cannot use the same email address in existence for another account. If the person needs to be assigned to more than one role, each role will require its own distinct email address.

4. Enter an Email Address.

This email address serves as a User Name and is not used to contact the provider. It does not have to be a valid email address, but it must be in the format of an email address.

5. Enter a **Password**. The password must have at least one uppercase letter, at least one lower care letter, at least one number, at least one special character, and must be at least eight characters in length.

Special Characters of \* and + are not accepted in the AuthentiCare password format.

6. Re-enter the password in **Confirm Password**.

The *Register* page displays with the entered information.

7. Click Register.
8. You are returned to the *Home* page. A message in the top left hand corner informs you that the registration was completed successfully. The user you just registered displays in the Registered Users section of the *Provider Entity Settings* page specifying the email address, the role assigned and that he is enabled.

## 1.5 Disabling an AuthentiCare Web User

If an employee of the provider has left the company and that person had access to AuthentiCare as an agency Administrator, it is critical that the user account is disabled immediately. Because you can log in to AuthentiCare anywhere you can access the Internet, a former employee would still have access to your agency's information. Only users with the NM\_Provider\_Admin role can disable an account.

1. Navigate to the *Provider Entity Settings* page by entering the name of the provider or some portion of the name in the Entities Search > field and click Go!
2. The Provider Entity Settings page displays.
3. Uncheck the Enabled checkbox:



User Name	Role	Registered On	Enabled
<a href="#">alejandro_palconm@acr.com</a>	NM_Provider_Admin	12/09/2020	<input checked="" type="checkbox"/>
<a href="#">praveen02_palconm@acr.com</a>	NM_Provider_Admin	12/03/2020	<input type="checkbox"/>

4. Click Save.

You are returned to the *Home* page which displays a message that the provider agency's office staff member change was saved successfully. This user will no longer be able to log into AuthentiCare. All changes are done in real time from the time of the save.

## 1.6 Changing Your Password

There reasons why an AuthentiCare user would need to change their password are:

**Password Expiration:** The password expires every 60 days and a new one needs to be chosen. There is a password rotation of ten (10) passwords which means that you cannot use any of your previous ten passwords when creating a new password.

**Security:** Users may want to secure their password by creating a new one if they feel this information has been compromised.

**Account Lockout:** After three (3) failed attempts to log-in in a single session the account is automatically disabled. Users with an Administrator role can manage registrations and change the password for the locked out user.

### Password Change Reminder

A reminder to change a password will appear once a user logs in and the password is to be changed within the next five (5) days. Users will also receive a reminder each of the next 4 days after that as illustrated below with a 3-day reminder. A provider has the ability to select 'Yes' to change the password or 'No' to bypass. Once the number of days has expired, the user will be required to change their password in order to log in to AuthentiCare.



Follow the steps below to change your password:

1. Place the cursor over **My Account** in the main menu, and click on **Change Password**.



The *Change Password* page displays.

### Change Password

Please enter your existing password, then enter your new password and confirm to change your current password.

\* Existing Password:

\* New Password:

\* Confirm New Password:

**Submit**

2. Enter your Existing Password.
3. Enter a new password in the New Password and Confirm New Password fields.

The Password must have at least one uppercase letter, at least one lower case letter, at least one number, at least one special character, and be at least eight characters in length. Do not use \* or + in your password.

The password entered cannot be the same as any of the previous ten passwords you have used.

4. Click Submit.

The AuthentiCare *Home* page displays with a confirmation that you successfully changed your password.

[Home](#) | [Create](#) | [Reports](#) | [Scheduling](#) | [Dashboards](#) | [Visits](#) | [Administration](#) | [My Account](#) | [Custom Links](#) | [Logout](#)

Needs Attention:  
Password was updated successfully.

## Chapter 2 - Navigating AuthentiCare

AuthentiCare provides several “starting points” from which to navigate through the system. All users will see the *Home* page when first logging in to the system. From this point, the user can access all data and functionality allowed by the assigned role.

For providers with the role of Administrator, and roles of AdminAssistant, Payroll/Billing or Payroll/Billing/Human Resources, there are two additional navigation tools that are listed on the top tool bar, *Provider Dashboard*, *Worker Dashboard*, and *Exceptions Dashboard*. These are short cuts to data that is essential to daily operations.

### 2.1 Home Page

The *Home* page is the central location in AuthentiCare. From this page users can navigate to any of the other areas of the system.

The user name is displayed in the upper right-hand corner of the *Home* page. All actions taken by the user are tracked in AuthentiCare to maintain an accurate record of activity.

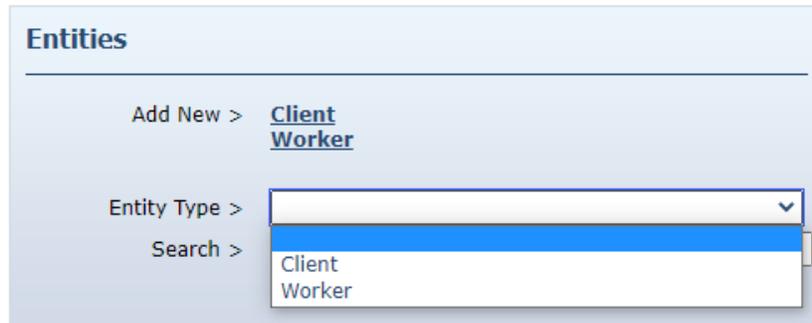
The Main Menu on the tool bar across the top of the page allows the user to navigate to different pages to perform different tasks. The options on the main menu differ depending on the user’s role and appear on every page in the system.

The *Home* page is divided into three sections:

The screenshot displays three distinct sections of the AuthentiCare interface:

- Entities:** Features a header with "Add New > [Client](#) [Worker](#)". Below this is a dropdown menu for "Entity Type" and a "Search" input field with a "Go!" button.
- Services and Authorizations:** Includes a "Search Type" section with radio buttons for "Service" and "Authorization" (selected). It contains multiple input fields for "Service", "Authorization ID", "Service Type", "Authorization Start", "Authorization End", "Client", "Provider", "Worker", "Payer", "Service Period", and "Procedure Code", each followed by a "Go!" and "Clear" button.
- Claims:** Features a header with "Add New > [Claim \(Standard\)](#) [Claim \(Express\)](#)". It includes a "Claim ID" input field with "Go!" and "Clear" buttons, a "Claim Status" dropdown, date pickers for "Claim Start" and "Claim End", and input fields for "Service", "Authorization ID", "Client", "Provider", "Worker", "Payer", "Procedure Code", and "User Option". A checkbox for "Include Inactive Claims?" is also present, along with "Go!" and "Clear" buttons.

Entities – There is an optional Entity Type to narrow the search. Users can choose from either Client or Worker.



The screenshot shows a web interface titled "Entities". It contains three main sections:

- Add New >**: This section has two links, [Client](#) and [Worker](#), both underlined.
- Entity Type >**: This section has a dropdown menu. The menu is currently open, showing two options: "Client" and "Worker".
- Search >**: This section has a search input field.

Services and Authorizations – This section of the Home page allows the user to perform detailed searches for existing services and authorizations by clicking on **Go!**

Claims – While most claims are created using the IVR phone system or the GPS enabled mobile device, designated roles can also create claims using the website. All claims, whether they were created using the IVR, mobile device or the website, can be viewed from the website. Users may perform detailed searches for existing claims from the Home page.

## Chapter 3 - Managing Worker Information

Worker information requires regular maintenance to add new workers, update current worker information and inactivate workers that no longer work for a provider agency.

### 3.1 Adding a Worker

Workers are vital to the AuthentiCare process. In order for the IVR system to document services provided by a worker, the worker must be in the system and have a system-generated ID number. This will enable accurate scheduling, use of the IVR and billing for services provided.

Prior to adding a new worker, it is recommended that a search be performed to determine if the worker has already been added.

Click **Create** in the menu bar and select **“New Worker”**.

**OR**

Click **Worker** adjacent to “Add New >” in the Entities section of the *Home* page.

**Worker Entity Settings**  
 \* Indicates a required field.

ID:  
 PIN:  
 \* First Name:   
 Middle Name:   
 \* Last Name:   
 Company Name:  
 SSN:  
 FID:  
 Gender:  
 Birth Date:   
 Email Address:   
 Begin Date:    
 End Date:    
 Language:   
 Status: Active  
 \* External Worker ID:   
 Worker Services:  (Dropdown menu: Mi Via Homemaker/Direct Support, Mi Via In Home Living Supports, Mi Via Respite, DD Waiver Respite)  
 \* Mobile Enabled:  Yes  No  
 Mobile Locked:  Yes  No  
 Password:   
 Worker Must Change Password:   
 Mobile phone number:   
 Device ID:   
 Office Phone:   
**Add Provider**

**Entity Addresses/Phones**  
**Add Address**  
**Add Phone**

**Holidays / Days Off**  
  
 Add Holiday   **Add** **Remove**  
 From Date To Date  
  **Add**

**Work Hours**  
 Choose if the entity will use the default business hours (Default), if the entity has the day off (Off) or if the entity has a custom hours (Custom).

	Default	Off	Custom	Start Time	End Time
Sun	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Mon	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Tue	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Wed	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Thu	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Fri	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Sat	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>

1. Enter the worker's First Name and Last Name.
2. Select the worker's Gender from the drop down box.
3. Enter the worker's Birth Date in mm/dd/yyyy format.
4. Select Language. Selecting either *English* or *Spanish* will determine the language the worker will hear when using the IVR. If *Other* is selected, the IVR language will default to *English*.
5. If the provider chooses, an External Worker ID can be entered. Many providers already have an ID number for their workers and want to capture that information here.
6. Select the Worker Services. Providers must select at least one service this worker may provide, but may select more than one if needed. To do so, hold down the Control key (Ctrl) on the keyboard while clicking the selections in the list.
7. Enter additional information in the appropriate fields if desired.

## 3.2 Editing Workers

Search for the worker you wish to edit.

The Worker Entities Settings page displays.

Verify, and if needed, update the appropriate fields such as **First Name, Last Name, Gender, Birth Date, Worker Services**, and scheduling information. Click **Save** at the bottom of the page to save the worker and return to the Home page.

A successful save message displays at the top of the page indicating the worker was saved successfully.

Needs Attention:  
Successfully saved Worker - test Worker1 (ID: [13365](#))

## 3.3 Suspending / Inactivating / End-Dating Workers

A worker cannot be deleted once there are any relationships created for the worker. In other words, if a worker has been scheduled for an event or if a claim has been created for which the worker provided the service, then the worker cannot be deleted from AuthentiCare. If the worker no longer works for the provider or simply will not be providing services any longer, there are three options for editing the worker file:

Change the worker's status to "Suspend". The worker cannot use the IVR but claims can be entered via the Web. All claims (pending and new) will show a critical exception that the worker is not eligible.

Change the worker's status to "Inactive". The worker can still use the IVR and have claims entered via the Web but all claims (pending and new) will show a critical exception that the worker is not eligible.

Populate the “**End Date**” field on the worker’s screen. The worker can still use the IVR and have claims entered via the Web. Claims with a Date of Service (DOS) prior to the end date will be processed normally. Claims with a DOS after the end date will generate a critical exception that the worker is not eligible.

At any time the “**End Date**” can be removed or the worker’s status changed back to active, making the worker again eligible to provide services and/or removing the “worker not eligible” critical exception from pending claims.

To suspend, inactivate, or end-date a worker, search for the worker. The *Worker Entities Settings* page displays:

### Worker Entity Settings

\* Indicates a required field.

ID: 13365  
PIN: \*\*\*\*\*

\* First Name:

Middle Name:

\* Last Name:

Company Name:

SSN:

FID:

Gender:

Birth Date:

Email Address:

Begin Date:

End Date:

Language:

Status:

\* Mobile App Mode:

---

External Worker ID:

\* Worker Services: 

- Personal Care - Consumer Delegated
- Personal Care - Consumer Directed
- Personal Care - Consumer Directed Visit
- Personal Care - Consumer Directed Training
- Consumer Directed Administrative Fee

---

\* Mobile Enabled:  Yes  No

\* Mobile Locked:  Yes  No

Password:

Worker Must Change Password:

Mobile phone number:

### Entity Addresses/Phones

Phone Type

---

### Holidays / Days Off

Add Holiday

From Date  To Date

---

### Work Hours

	Start Time	End Time	Def	Off	Cust
Sun	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mon	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tue	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wed	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Thu	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fri	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sat	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Change **Status** to Suspend or Inactive, or enter an End Date.

Click Save at the bottom of the page to save the worker and return to the *Home* page.

A successful save message displays at the top of the page indicating the worker was saved successfully.

Needs Attention:  
Successfully saved Worker - test Worker1 (ID: [13365](#))

If a worker is rehired, that worker should not be re-entered because the worker still exists in the system. Instead, the **Status** should be changed back to Active and/or the End Date removed.

## Chapter 4 - Managing Client Information

AuthentiCare users can search for clients in any of the following ways:

From the Entity section of the Homepage, enter the client's full last name in the Entities Search field on the Home page. Click **Go!**

OR

Enter the Client's Medicaid ID in the Entities Search field on the Home page. Click **Go!**

The client's Last Name search will complete only if a User enters four or more alphanumeric characters.

If fewer than 4 characters are entered the following message will display:

**Needs Attention:**  
No entities were found matching the search criteria. For Searching client full name, please provide 4 or more characters.

When the search is successful, the **Client Entity Settings** page displays. This page provides client information required for claim processing, scheduling, EVV mobile method and client's home phone landline.

### 4.1 Adding Client Information

You must have the client's **Medicaid ID** to import client information to the system.

1. From the **Home** Page, click on Add New > **Client** hyperlink.
2. The **Client Entity Settings** page will display.
3. Enter the client's New Mexico Medicaid ID.
4. Click **Search**.

The screenshot shows a web interface with two main panels. The left panel, titled "Client Entity Settings", contains various input fields: ID, PIN, First Name, Middle Name, Last Name, Company Name, SSN, FID, Gender (dropdown), Birth Date (MM/DD/YYYY), Email Address, Begin Date, End Date, Language, and Status (Active). Below these are Plan ID, Payer Assignment, Medicaid ID, Representative, and Effective Date. The right panel, titled "Entity Addresses/Phones", has two buttons: "Add Address" and "Add Phone". At the bottom, there are "Search" and "Cancel" buttons, with the "Search" button highlighted by a red rectangle.

The system will auto populate the fields with the client information. Review the information for accuracy and click on the **Save** button.

## 4.2 Client Address and Phone Number

Verify the **Phone Type** and **Phone Number** for the client. Providers can add additional address and telephone information for the client, but this does not update the system of record.

1. Click **Add**.
2. Choose Type.
3. Add the address and/or the telephone number.
4. Click **Save**.

The address is related to the GPS coordinates recorded in the Mobile App from the location of the mobile device. The number(s) listed is the one AuthentiCare will use to verify whether or not the Caregiver is calling from the Client's service location.

Click **Save** at the bottom of the page to save the Client information and to return to the Home page.

A successful save message displays at the top of the page indicating the Client information was saved successfully.

Needs Attention:  
Successfully saved Client - Echo Foxtrot (ID: [22222333333](#))

## Chapter 5 - Creating Web-Based Claims for Payer Review

Web claims must be created from the Create dropdown on the Main Menu.

### Standard Claim

**\* Client**

**\* Worker**

**\* Service**

**\* Provider**  
Best Health Agency Inc

**Mileage:**

**Travel Time:**

Show All Claims

---

Total Claims: **1**

Total Calculated Amount: **\$0.00**

Total Authorized Amount: **\$0.00**

Total Units: **0**

**Save**

**Delete All**

**Cancel**

Click here  more service(s)

Total Lines: 1 Total Claims: 1 Total Amount: \$0.00 Total Authorized: \$0.00

Delete | Add Lines Above | Add Lines Below | Move Up | Move Down

**Note:**

**Note Data**

Once a Provider enters a web claim with the Note and Reason, and saves the claim, the claim is marked with the Critical Exception "Payer Review Required".

Note Data displays the Reason and Notes explaining why the web claim was created. The Provider can no longer edit and save changes to the claim other than to inactivate it or to cancel the view of the claim.

Claim Search Results

<b>* Client</b>	<b>* Provider</b>	<b>* Worker</b>	<b>Payer Assignment</b>		
Test, client1	CMC Test Provider	Worker1, test	Current Payer For Client		
<b>* Service</b>	<b>Date</b>	<b>Time</b>	<b>Amount</b>	<b>Date</b>	<b>Time</b>
Personal Care - Consumer Directed Visit	02/08/2018	01:00 PM	00:30 ##:##	02/08/2018	01:30 PM
<b>Activity Codes:</b> 2 (ex: 3,5,8)					
<b>Reason Code:</b>					
<b>Mileage:</b>					
<b>Travel Time:</b>					
Total Lines: 1 Total Claims: 1 Total Amount: \$2.00 Total Authorized: \$2.00					

Claim ID:	<b>11826</b>
Filed On:	<b>Web</b>
Printer Friendly	
Show All Claims	
Total Claims:	<b>1</b>
Total Calculated Amount:	<b>\$2.00</b>
Total Authorized Amount:	<b>\$2.00</b>
Total Units:	<b>2</b>
Total Hours:	<b>00:30</b>
Scheduled Units:	<b>0</b>
Scheduled Hours:	<b>00:00</b>

**Critical Exceptions**

**Test, client1** Billing has not been confirmed for this claim.  
 This claim does not have a matching event.  
 Payer Review Required  
 EVV not used

**InActive**

**Cancel**

Note:

Note Data	
Date: 02/08/2018 03:13 PM	User: cmc@testprovider.com
Reason: Tablet not delivered	
Notes: Tablet is to be delivered on March 1.	

Audit Data
[View Audit Data]

## Chapter 6 - Reports

AuthentiCare reports provide valuable data about members, Care Workers and services. Users may access core reports and create ad hoc reports or report templates.

### 6.1 Report Menu

The AuthentiCare web portal Home page Main Menu Bar allows access to reports. The user will click Reports.



There are three sections of the Report Page:

**Report Templates:** Users can create templates for reports that are created on a regular basis. For example, if there is a need for a report on Late and Missed Visits at the end of each month for all members, a template can be created with the desired settings.

**Create Reports:** A variety of reports are available for creation and each can be filtered and sorted to create a unique report to fit the user's needs. Each report name is a hyperlink that allows you to enter your filter, sort criteria and run the report.

**View Reports:** Once a report is generated, it appears in the View Reports section of the page. Reports can be saved to the user's local drive for permanent storage and retrieval. If a report is needed later and has been deleted, it can simply be rerun for the same dates. Click a report name hyperlink from the list provided in the Create Reports section of the Report Page.

### 6.2 Report Descriptions

Report Name	Description
Authorizations	The Authorizations Report lists all authorizations in AuthentiCare for a given time period. The report can be filtered to include only authorizations for a Client or service. The Authorizations Report does not include the Claims associated with the authorizations. The Authorizations Report with Visit Detail is the same as the Authorizations Report however, in addition to the authorizations, any visits associated with those authorizations are displayed. This report provides information on the number of units remaining in the authorization based on the number of units for which there are visits.
Billing Invoice	The Billing Invoice report gives a list of visits for each service date, along with the billing status and amount. With this report, program providers have documented what was submitted each day. Program providers can then monitor the Remittance Advice to validate that each visit was adjudicated as expected.
Calendar	The Calendar Report lists all scheduled events for a selected time period. The report can be filtered to include only events related to a

Report Name	Description
	particular member, attendant or service. The report can be generated by the day, week or month.
Claim Data Listing	The AuthentiCare Visit Data Listing Report gives a provider the ability to download visits data as needed for use in the back-end systems. As with the other AuthentiCare reports, the provider must select report criteria on the criteria pages. The Visit Data Listing Report lists, by provider and worker, all services performed during a given time period and the total dollars billed.
Claim Details	The report provides most of the data elements shown in the visit record, displayed as one row for the client, with only the current payer.
Claim History	The Visit History Report lists the detail of changes made to a visit or group of visits for auditing purposes. For example, a visit was confirmed for billing and there is a need to know who confirmed it. The Visit History Report requires a filter for Visit Dates which include Current Day, Current Week, Current Month, Last Week, Last Month or Fixed Date Range.
Exception	Exceptions are used to readily identify visits that do not meet the business rules established for the program. Exceptions can be informational to alert the user that a criterion was not met (like the check in phone number not matching the authorized number) or can be critical, which prevent the visit from being exported for adjudication (for example, no authorization for service). The Exception Report is structured to identify exceptions for a single member or for multiple members with the same exception.
Late and Missed Visits	Provides information on late and missed visits and any selected reason codes. The report can be filtered to display information relating to a particular member, attendant, service or event.
Provider Activity	The provider activity reports show the EVV record associated with the beneficiary and matches it to the claim/encounter submission for the provider. This report shows any members that the program provider has authorization to provide services for or has visits. It provides most of the data elements shown in the client record. The report displays only one row for the client, with only the current payer.
Time and Attendance	The Time and Attendance Report is a useful tool for the providers who need to know the time billed by a selected worker for a specified time period. It can be used to identify workers who report an unusually high number of hours worked, which could be considered a risk for quality of care issues, or for providers to compare the revenue one worker generates with another's. The Time and Attendance Report has several filter criteria. Claim Type, Claim Dates and Exception are all required when running the report.
Unauthorized Phone Number	The Unauthorized Phone Number Report provides ready access to a list of calls that were made from a phone other than the phone number associated with the client. These calls result in a claim with an unauthorized phone number exception. This report serves as an administrative tool allowing the Provider to Identify workers making calls from outside the home, Identify phone numbers that have changed and need updating in AuthentiCare.

Report Name	Description
Worker By Provider	The AuthentiCare Visit Data Listing Report gives a provider the ability to download visits data as needed for use in the back-end systems. As with the other AuthentiCare reports, the provider must select report criteria on the criteria pages. The Visit Data Listing Report lists, by provider and worker, all services performed during a given time period and the total dollars billed.

## 6.3 Creating a Report

This example uses the Authorizations Report template. It displays the filter and sort criteria for the report which are unique for the chosen report.

1. Enter a **Report Name**. This automatically defaults to the name of the report selected, but this name should be changed to something more descriptive. For example, if the report is for a single member, the report name can be changed to include the member's name and the date range.
2. Enter a **Description**, if desired. This is most helpful in creating templates.
3. Choose a date range from the drop-down box for the **Dates** field. This field appears on this page for all of the reports, though it may appear as Visit Dates or Effective Dates depending on the report selected.



4. Enter any other filter criteria desired such as Member, Care Worker, Service or Provider. These criteria are similar for all reports. Entering one of these or a combination of these creates a unique report. If no information is added, the report includes all information for the period selected.
5. Select **Sort** criteria as desired. These are similar for all reports. AuthentiCare allows selection of up to three sort items. For example, the program provider/FMSA may choose to have the report sorted first by Member, Client, then by Service, then by Date. In this example, the Sort fields would be populated as shown below.
6. Choose the **Report Type(s)** to indicate the format in which the report will be displayed. You can choose as many format types as needed. If you do not choose, the report will automatically default to PDF except for the two list reports (Visits Data Listing and Remittance Data Listing), which default to Excel.
7. Click **Run Report**.

The system returns to the **Report** page. The report appears in the View Reports section of the page with a submitted time and status. The Status will be one of the following:

- Queued: the report is in line for processing
- In Progress: the report is being created
- Completed: the report is ready for viewing

It usually takes a few minutes for a report status to change from Queued to Completed. There is an interim status of In Progress. To view the updated report status, you may need to refresh your browser. This updates the page and displays the latest report status.

## 6.4 Viewing Reports

Instead of creating the same report at the end of each week, month or quarter, program providers/FMSAs can save time by viewing the completed reports. Click one of the icons under the report name to generate the report in the desired format. These icons do not appear until the status of the report is **Completed**. The icons are:



Adobe (PDF)



Excel (XLS)



Comma delimited (CSV)



Extensible Markup Language (XML)

Click **Open** if you wish to open the report in a new window or click **Save** to save the report to a storage location such as your hard drive or a network drive. You will not see this if you choose the PDF option to view your report.

## 6.5 Deleting a Report

Reports are automatically deleted three days after they are created. Click the checkbox to the left of the name of the report you wish to delete sooner.

Report Templates		[Delete Selected Templates]
<input type="checkbox"/>	<a href="#">Authorizations Report</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	<a href="#">Authorizations Report - July 2019</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	<a href="#">Claim Data Listing Report</a>	<a href="#">Schedule</a>

View Reports			[Refresh]	[Delete Selected Reports]
<input type="checkbox"/>	Name	Submit Time	Status	
<input type="checkbox"/>	Claim Data Listing Report	7/7/2019 3:57 PM	Queued	
<input type="checkbox"/>	Claim Details Report - Week 1 July	7/7/2019 3:52 PM	Completed	

Clicking the checkbox next to **Name** populates a checkmark in the checkboxes for all of the reports listed in the View Reports section.

View Reports		
	[Refresh]	[Delete Selected Reports]
<input checked="" type="checkbox"/> Name	Submit Time	Status
<input checked="" type="checkbox"/> Claim Data Listing Report	7/7/2019 3:57 PM	Completed
<input checked="" type="checkbox"/> Claim Details Report - Week 1 July	7/7/2019 3:52 PM	Completed

Click **Delete Selected Reports** if you want to permanently remove the report(s) selected.

## 6.6 Using Report Templates

Templates are the fastest way to create reusable reports. For example, if you needed to look at a specific report every day, you should create a template. Templates remain in the Report Template area until deleted.

### Creating Report Templates

**Calendar Report**  
\* Indicates a required field.

\* Report Name:

Description:

---

\* Effective Dates:

Event:

Authorization:

Payer:

Client:

Provider:

Primary Worker:

Service:

Include Edited Events Only

Sort 1:

Sort 2:

Sort 3:

---

ReportType(s):  PDF  Excel  CSV  XML

**Save As Template** **Run Report** **Cancel**

1. Click on a report name from the list provided in the **Create Reports** section of the **Report** page. The **Calendar Report** page for the report displays. This page is where you enter the filter and sort criteria for the report.
2. Enter a unique **Report Name**. This automatically defaults to the name of the report selected, but this name could be changed to something more descriptive.
3. Choose a date range from the drop-down box for the **Effective Dates**. This varies based on the type of report.
4. Enter any other filter criteria. This varies based on the type of report.
5. Select **Sort** criteria as desired.
6. Select the Report Type(s).
7. Click Save as Template.

The Report page displays and the template just created is included in the Report Templates section.

## Running a Report from a Template

Click the **Run Report** icon adjacent to the name of the template.

The system returns to the **Report** page. The report application in the View Reports section of the page with a submitted time and status of **Queued**.

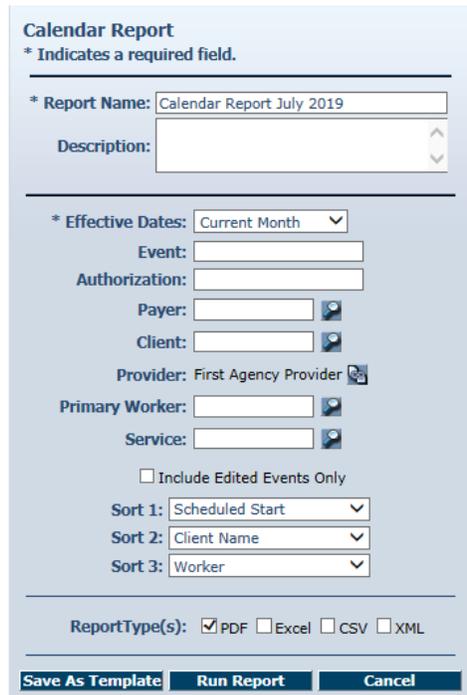


**Report Templates** [Delete Selected Templates]

<input type="checkbox"/>	<a href="#">Authorizations Report</a>	<a href="#">Schedule</a> 
<input type="checkbox"/>	<a href="#">Authorizations Report - July 2019</a>	<a href="#">Schedule</a> 
<input type="checkbox"/>	<a href="#">Calendar Report July 2019</a>	<a href="#">Schedule</a> 

## Editing a Report Template

1. Click the hyperlink on the name of the report. The **Calendar Report** page displays.



**Calendar Report**  
\* Indicates a required field.

\* Report Name:   
Description:

\* Effective Dates:

Event:   
Authorization:   
Payer:    
Client:    
Provider:    
Primary Worker:    
Service:  

Include Edited Events Only

Sort 1:   
Sort 2:   
Sort 3:

ReportType(s):  PDF  Excel  CSV  XML

[Save As Template](#) [Run Report](#) [Cancel](#)

2. Edit the **Calendar Report** page as desired.



3. Click **Save as Template**.

## Deleting a Report Template

1. Click the checkbox to the left of the name of the report template you wish to delete.
2. Click **Delete Selected Templates** if you want to permanently remove the report template.

The **Report** page displays. In this example, the **Description** was modified and it now displays under the name of the Report Template.



After the delete function, the page displays, and the deleted calendar report template is no longer listed.

## 6.7 Scheduling a Report

AuthentiCare provides users with a standard report criteria (template) page to select content and sorting of the data requested in a report. Instead of running as a report immediately from the Reports page, the user can select Save as Template. This choice accesses a Reports Scheduler feature in AuthentiCare whereby a program provider/FMSA is able to:

3. For any report, filter for content, sort as needed, then select a standard file format for the output as available: Excel, CSV, XML or PDF
4. Save the template
5. Once saved, select **Schedule**

## Schedule Report

**Schedule: Provider Activity Report**

Schedule Type:

Start Date:  Time:

End Date:

Monthly:  Day of the Month   The

Recurring Weekday:  Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Disabled:

Email:  Send Email when report completes

Email Addresses (semicolon delimited list):

6. Select **Schedule Type** to choose a daily or monthly schedule for the report to run.
7. Specify a regular **Time** in the scheduler for the report to run.
8. Select the **Recurring Weekdays** or the **Day of the Month** for the report to run.
9. Specify Email Addresses to receive an automated email alert once the report has completed running and the file is ready for pickup and viewing.

Scheduled Export files for the user are available under View Reports on the **Reports** page. The user clicks on a file icon and the file opens in a browser tab. The file can be saved from there.