Provider Advantage User Manual

Guidelines for Providers

CASCADE CENTERS
INCORPORATED

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Your Success is Our Compass

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Provider Advantage User Manual

GUIDELINES FOR PROVIDERS

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Welcome to Provider Advantage

Provider Advantage is Cascade EAP's online system that gives affiliate providers an easy-to-use application for billing and tracking clients. This system allows users to access information 24 hours per day/7 days per week. Provider Advantage is used to:

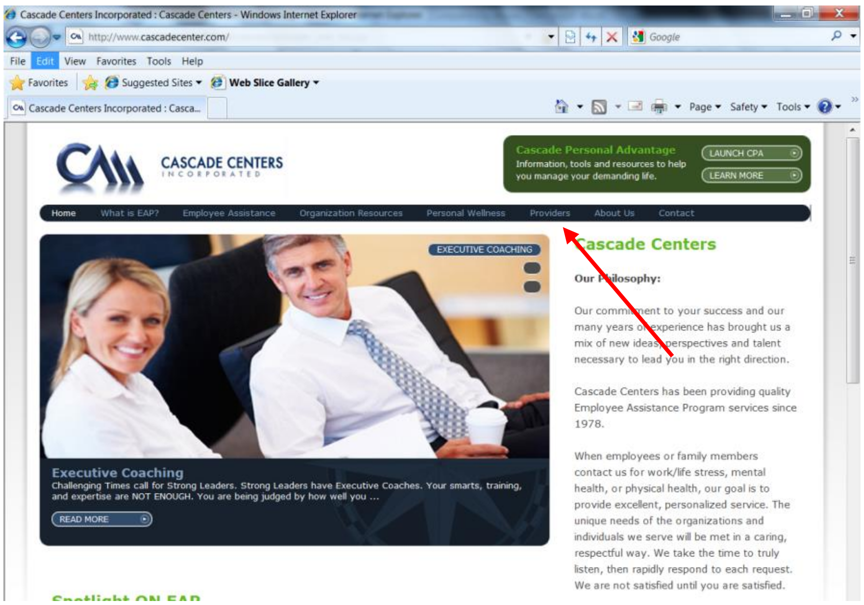
• **View referrals**	• **Submit dates of service for payment**
• **Request extensions**	• **Track paid cases**
• **Reduce paper and postage costs**	• **Reduce administrative time**
• **Submit inquiries to customer service**	• **Report GAF scores**

Provider Advantage is completely secure and is built with multiple layers of network security. Our system employs 128-bit secure socket layer encryption for all communications between the provider's computer and the portal. We also encrypt sensitive data that is stored in the database with 256-bit AES (Advance Encryption Standard).

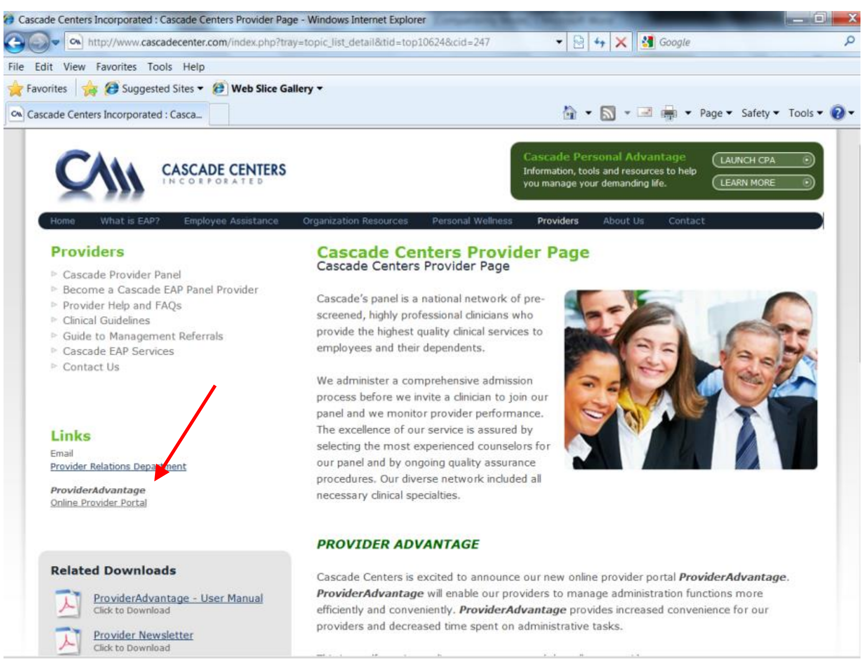
To Access Provider Advantage

1. Go to www.cascadecenter.com

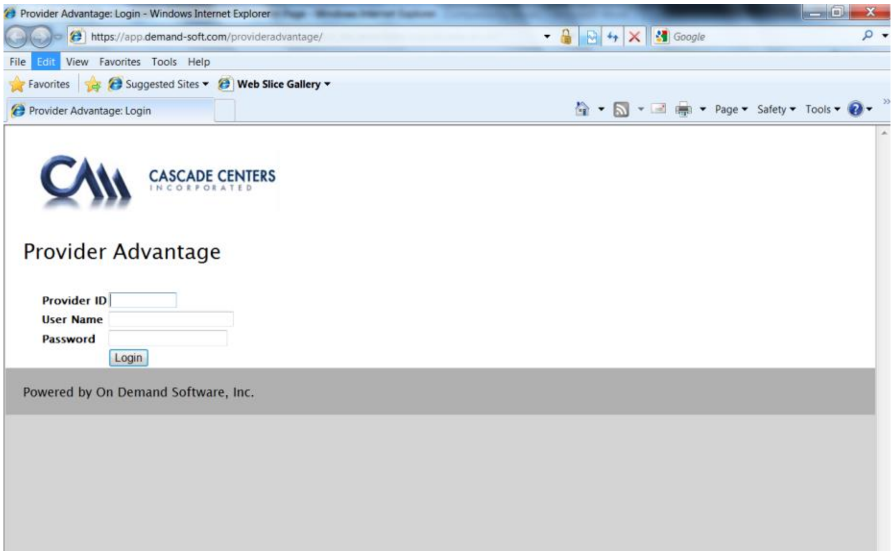
2. Click on the “Providers” button in the navigation bar.



3. Click on the “Online Provider Portal” link on the left side of the screen.



4. Use the ProviderID, User Name, and Password that Cascade provided. If you do not have this log in information contact Cascade. Passwords are case sensitive and can be changed under “My Profile” once logged in. If you have multiple locations, you will have one login and access all your clients in one list.



Once logged in you will see the Dashboard. The top navigation bar provides links to the different sections of Provider Advantage.

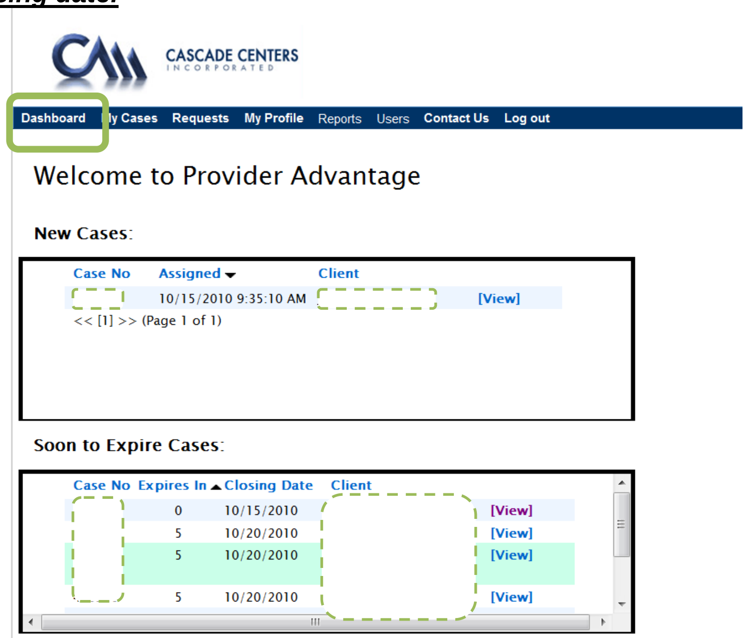
The navigation bar provides eight options:

- **Dashboard:** The main screen – lists “new” clients, cases closing within 15 days, and special announcements.
- **My Cases:** Lists all case assignments referred since 7/8/2010.
- **Request:** Tracks closing date extension requests.
- **My Profile:** Update password, mailing address (***location address changes must go through Cascade staff by calling the office***), and payment information.
- **Reports:** View payment reports, see which clients and dates of service were paid on a specific date.
- **Users:** Lists multiple users who have access to your profile – billing, office staff, etc.
- **Contact Us:** Mailing address, phone number, and email address to contact Cascade.
- **Log out:**

Dashboard

The main screen – This is the first screen that appears after logging in. You can view “new” clients (clients who do not have a first appointment date reported to Cascade EAP), special announcements, and cases closing within 15 days, and.

Cases in the Soon to Expire Cases box must either be submitted for payment or an extension requested before the closing date.



*Client and provider names have been removed for the purpose of this screen shot

My Cases

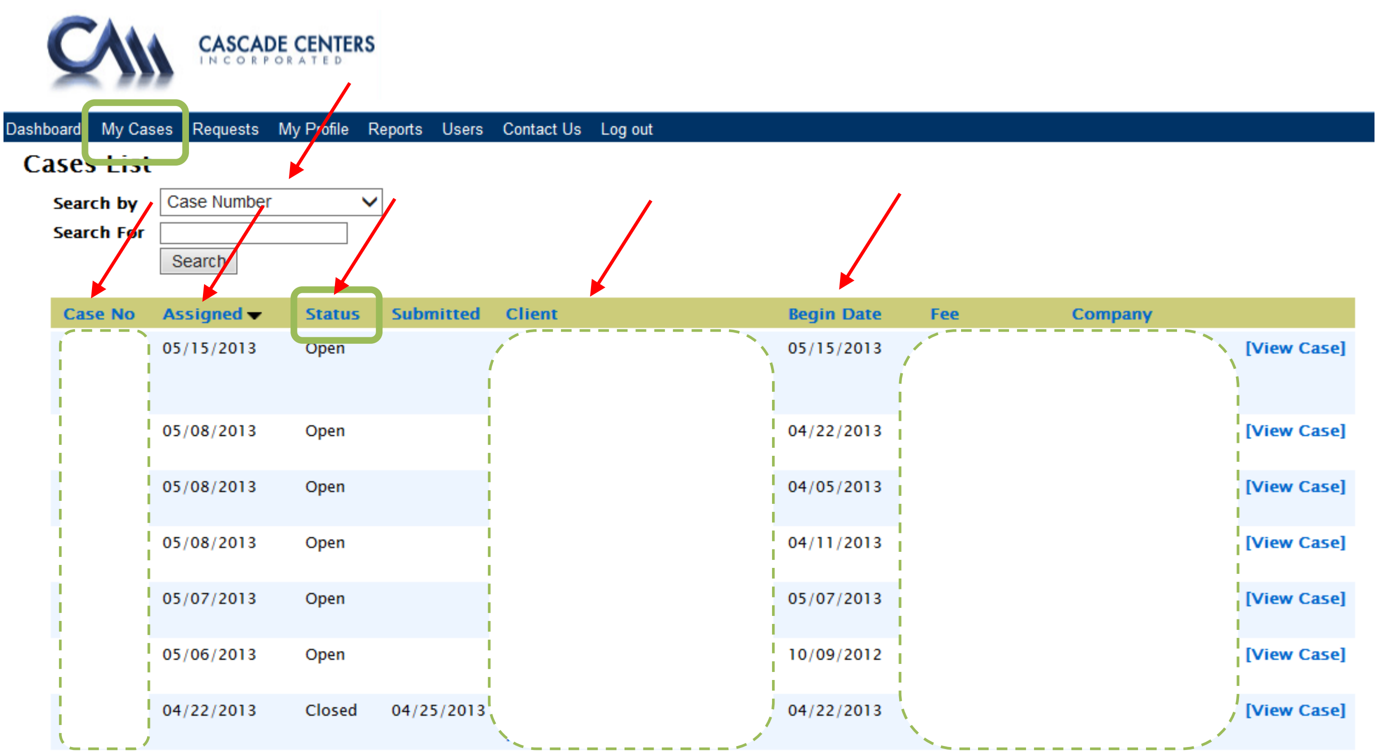
Cases are listed showing case number, date assigned to provider, status, employee/client name, and case begins date. If you have multiple cases, you can use the "Search by" box to search for a specific case by case number or client name. Columns can also be sorted by clicking the column header.

Case Status Definitions:

New: First appointment date not "reported" to Cascade by provider or client. Once the first session date has been "reported", the case will no longer be listed in the "New Cases" box on the Dashboard.

Open: First appointment date has been reported and sessions can be posted to case

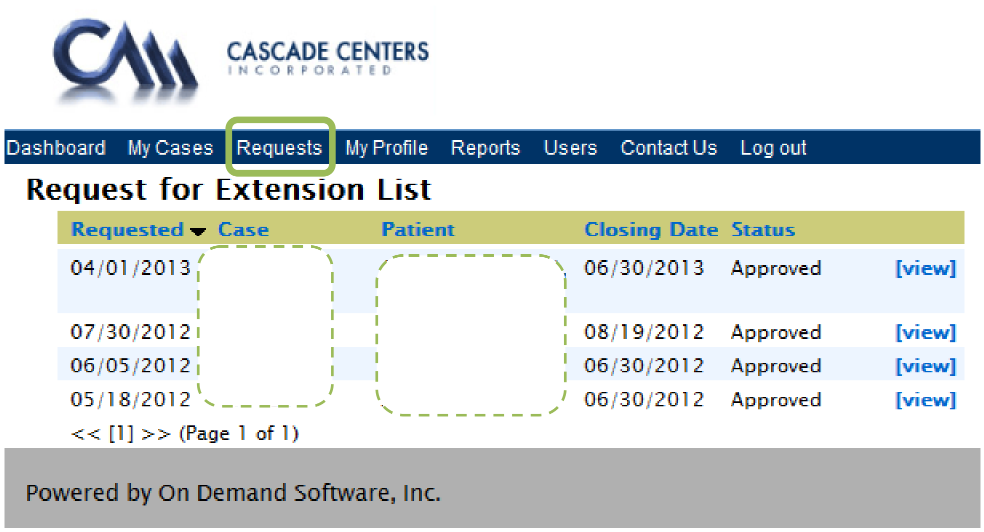
Closed: Sessions have been posted, submitted for payment, and case considered closed. **Call Cascade to re-open case if eligible prior to seeing client again.**



*Client names have been removed for the purpose of this screen shot

Requests

Requests screen lists all requests submitted through the portal to extend out the case's closing date. You can track the status of the request and notations regarding the approval/denial of the request. In addition, when requests are processed and completed, you will also receive an email notification.

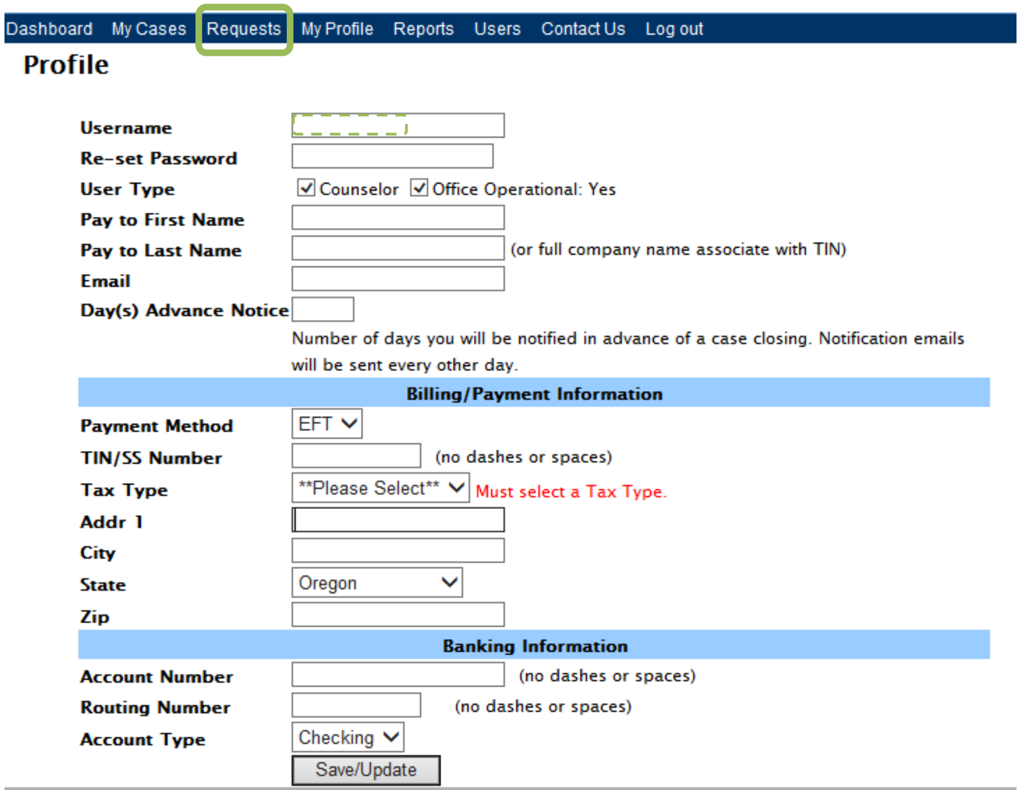


*Client names have been removed for the purpose of this screen shot

My Profile

Where you can update password, mailing address (***location*** address changes must go through Cascade staff by contacting our office direct), and payment information. Ensure all your information is correct and up to date. Once a change has been saved, a notification will be sent to Cascade.

If changing location address, contact Cascade EAP directly.



- Your password can be changed at any time by clicking in the password box, entering new password and clicking save. If you misplace your password you can contact Cascade and your password can be reset.

- Email address should be the address where you would like correspondence sent. This would be notification of: new clients; payments; cases nearing closing date; requests for license or liability insurance; etc.. Ensure your spam filter accepts emails from “demand-soft.com” and “cascadecenters.com”. Your email address will only be used for EAP correspondence.

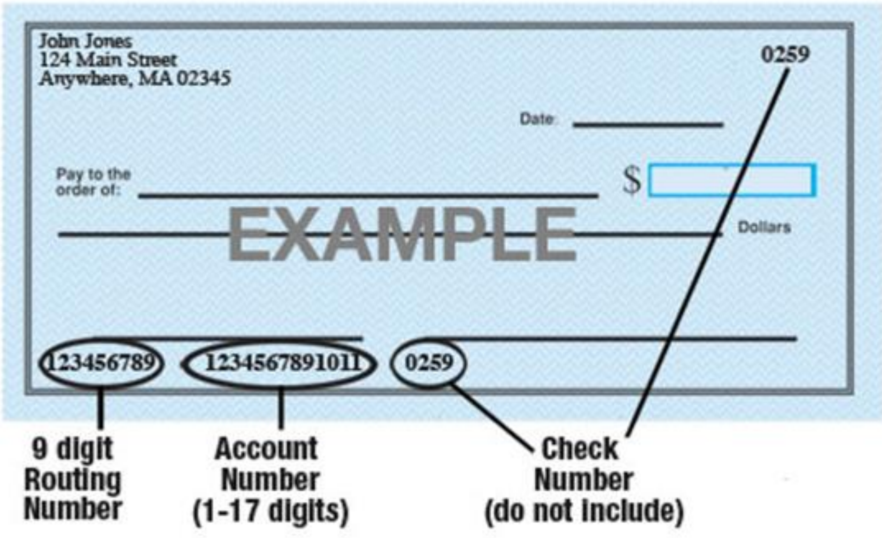
- Verify the “Pay to” information is accurate:

    - **If your tax identification number (TIN) is associated to you personally**, enter your First and Last names in the appropriate fields.

    - **If your TIN is associated with a group or company name**, enter the company name in the “Pay To Last Name” field and leave the “Pay To First Name” field empty.

    - **The “Pay to” information must match the information reported to the IRS for the TIN/SS provided.** If your TIN changes, a new W-9 must be sent to Cascade.

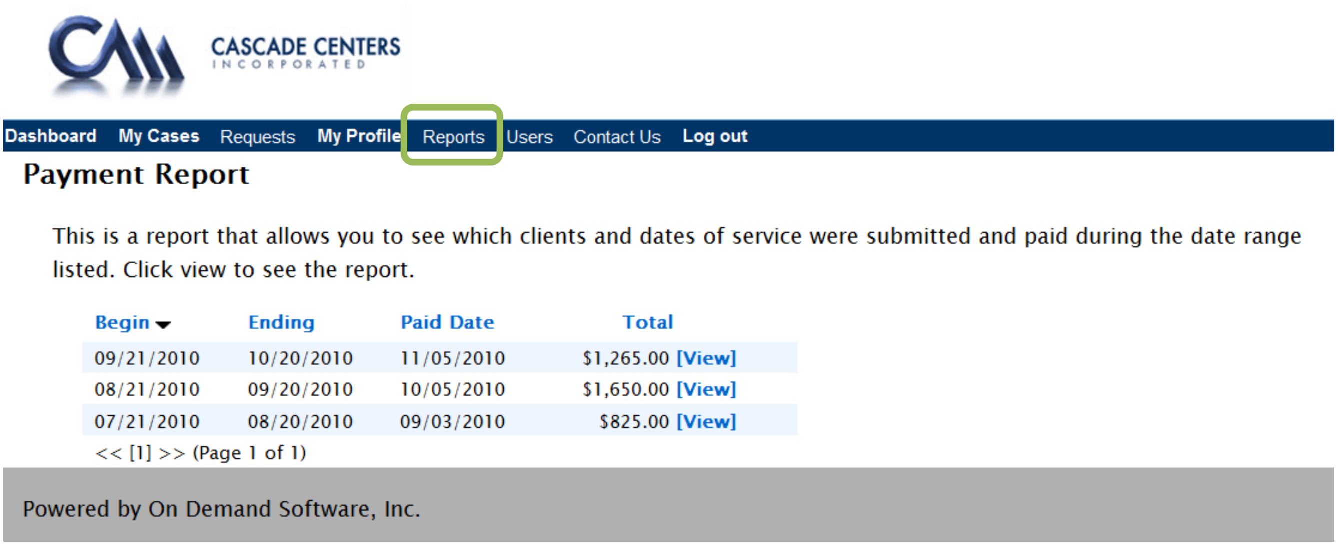
- Effective January 1, 2010 providers are only paid through direct deposit. Please supply your direct deposit information as listed on the bottom of a check for the account you would like money to be deposited. Payment will be made to the account listed in your profile as of the closing date of the batch (25th of the month). Changes to your billing information after the cutoff will be applied to future payments.



- If you have multiple locations, update the information for each location separately under the “Users” page. **<u>If your physical location changes, contact Cascade directly to have another location created for you in our database.</u>**

Reports

View payment reports and see which clients and dates of service were paid on a specific date.



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Dashboard My Cases Requests My Profile Reports Users Contact Us Log out

Payment Report

This is a report that allows you to see which clients and dates of service were submitted and paid during the date range listed. Click view to see the report.

Begin	Ending	Paid Date	Total
09/21/2010	10/20/2010	11/05/2010	$1,265.00 [View]
08/21/2010	09/20/2010	10/05/2010	$1,650.00 [View]
07/21/2010	08/20/2010	09/03/2010	$825.00 [View]

<< [1] >> (Page 1 of 1)

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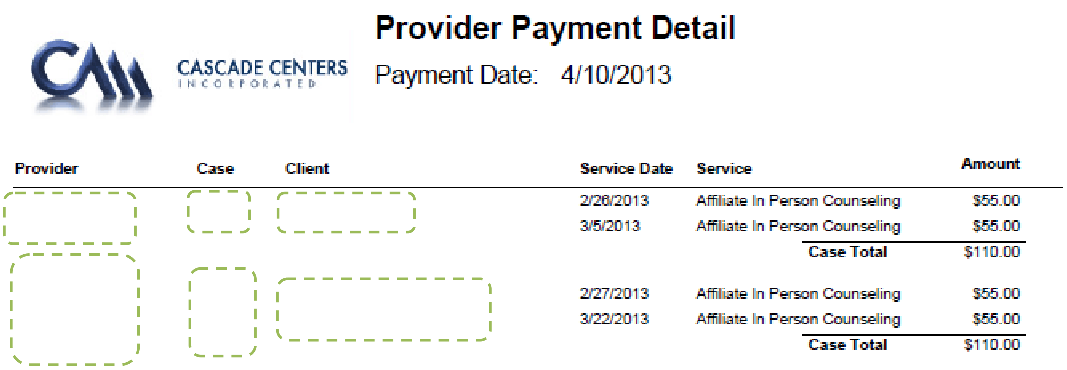
Click on “view” to view the details of a specific payment. The report is generated as a PDF. You must have Adobe Reader on your computer to be able to view the report. Adobe Reader is a free program that can be downloaded at **http://get.adobe.com/reader**.



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Provider Payment Detail

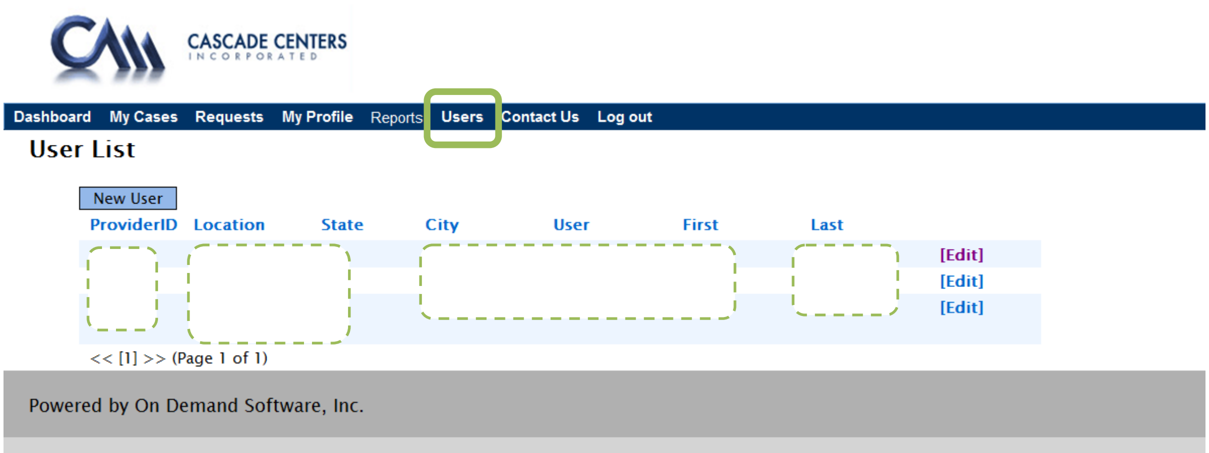
Payment Date: 4/10/2013

Provider	Case	Client	Service Date	Service	Amount
			2/26/2013	Affiliate In Person Counseling	$55.00
			3/5/2013	Affiliate In Person Counseling	$55.00
				Case Total	$110.00
			2/27/2013	Affiliate In Person Counseling	$55.00
			3/22/2013	Affiliate In Person Counseling	$55.00
				Case Total	$110.00

*EXAMPLE Payment Report. Client and provider names have been removed for the purpose of this screen shot

Users

Lists users who have access to your profile or if you have multiple locations, they are listed here. If you have additional people who need access to your cases (for instance a billing service or office staff) please contact Cascade for assistance. If you have multiple locations, they are listed here as well. Click on “view” to ensure the profile is complete for each location. Do not add new users without contacting Cascade EAP directly.



*Addresses and names have been removed for the purpose of this screen shot

Contact Us

Mailing address, phone number, and email address to contact Cascade. **If contacting Cascade after business hours or on the weekend, responses will be made on the next business day.** Business hours: 8:00 am – 5:00 pm Monday through Thursday and 8:00 am – 4:00 pm on Friday. All times are Pacific Standard Time.

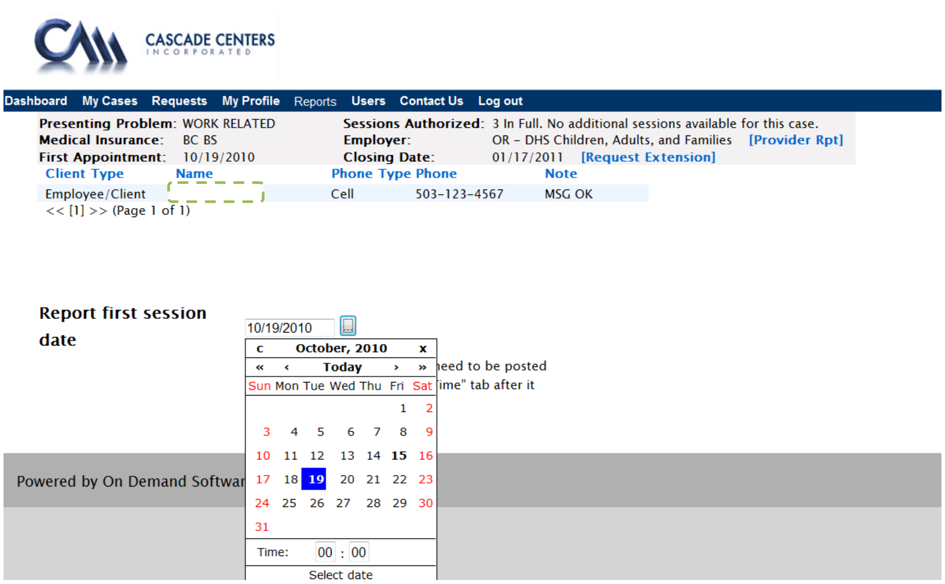
Log Out

Click “log out” when you complete your current session in Provider Advantage.

"New" Cases

New cases are those cases that do not have a first appointment date reported. Cascade will call you with the referral of a client and send you an email notification – client names will not be included in the email. Once you have contacted the client and scheduled an initial appointment, log in to Provider Advantage and report the first appointment date.

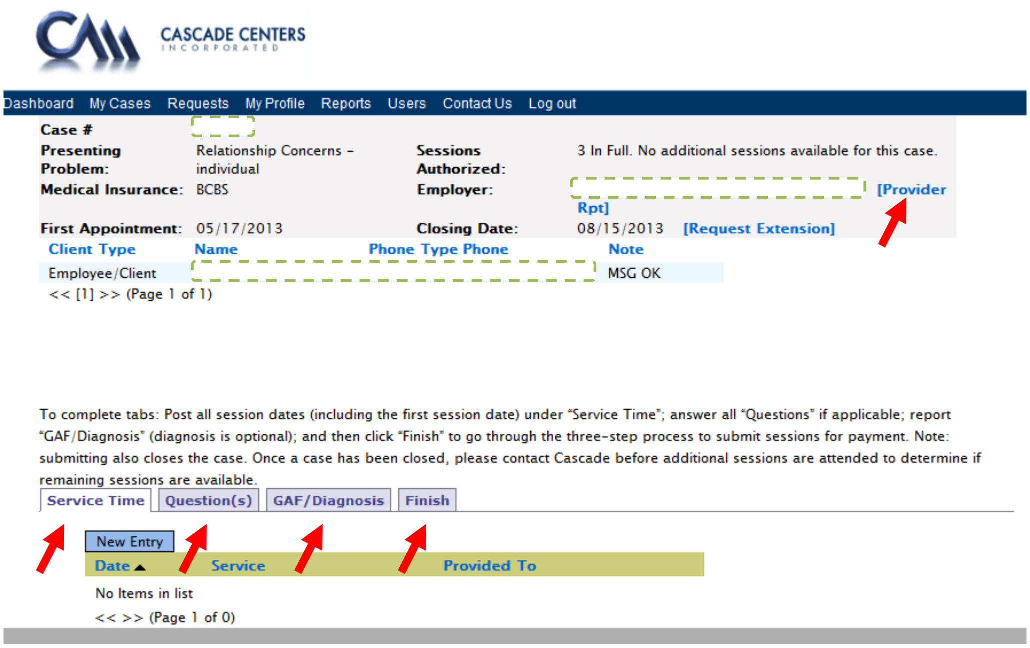
- Locate the client in your "My Cases" list
- Click on "View"
- You will get a prompt to "report" the first appointment date in the field provided. You can either use the field and enter in the format of mm/dd/yyyy or use the calendar link provided. Click on "today" in the calendar to bring it to the current month.
- Once the first appointment date has been "reported" and saved, this will report the first appointment date to Cascade, generate the case's closing date (which by default is 90 days from the first appointment date *__unless otherwise notified__*), and remove the case from our daily call back list.
- If the first appointment date changes once it has been reported, you must contact Cascade to have it changed manually in the case.
- **__NOTE__: reporting this initial appointment date is not posting a session to the case. All sessions will still need to be posted under the "Service Time" tab once they have been attended.**
- This case will now be considered "open."



*Client and provider names have been removed for the purpose of this screen shot

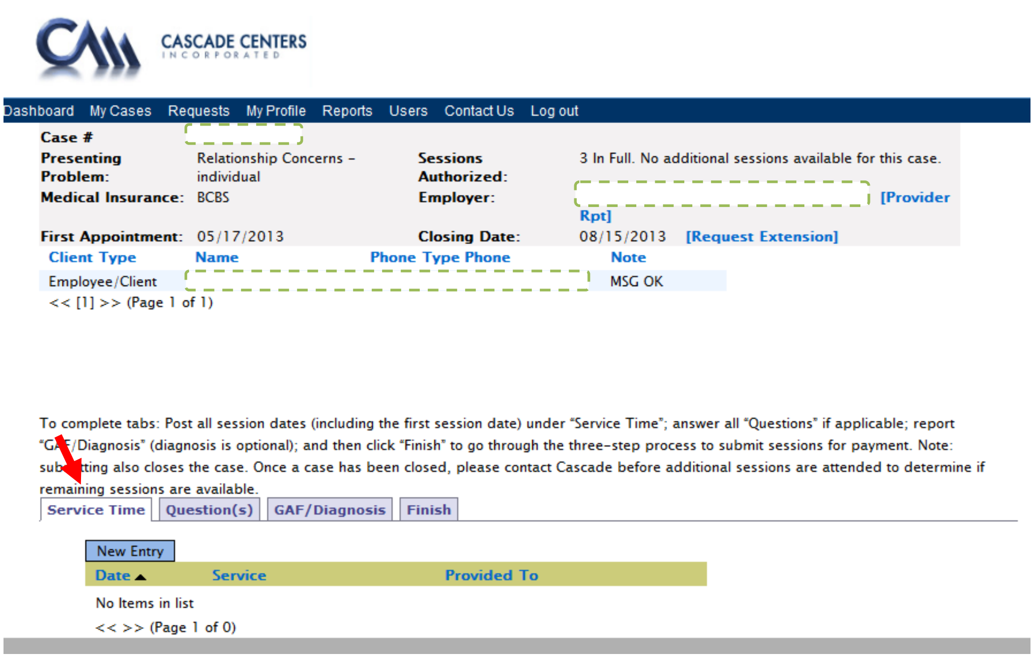
"Open" Cases

Open cases are cases that already have the first appointment date "reported" into their cases. The case is ready to post service time, update Questions (if applicable), report GAF/diagnosis, and submit the case for payment. If you have a billing person who will be posting and submitting sessions – you can print out the "Provider Report" to complete and give your billing person when you have completed the EAP sessions or the issue is resolved. This will provide your billing person all the information they will need.

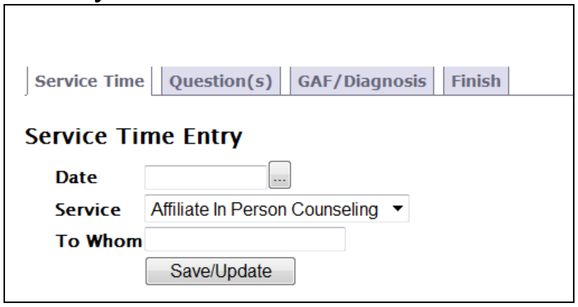


*Client and provider names have been removed for the purpose of this screen shot

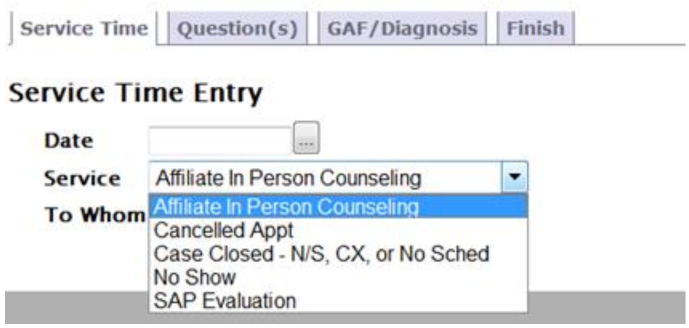
1. **<u>Service Time</u>:** enter **<u>each date</u>** of service for the case.
    - **If you are continuing to see the client do not complete the rest of the tabs until the sessions are exhausted, or the issue is resolved, and you are truly ready to close the case by submitting it for payment.**



- ******Click on "New Entry" and the service time window will open



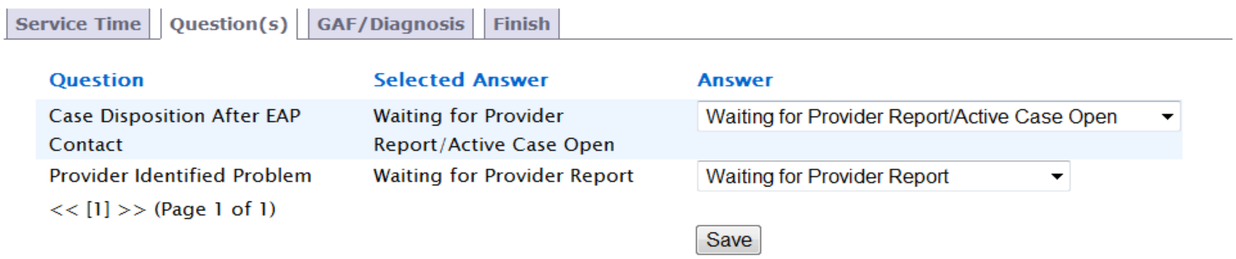
- Date: Enter the date in the format of **mm/dd/yyyy** or use the calendar provided.
- Service: Select the type of service you are posting – **default is "Affiliate In Person Counseling"** representing a standard session.
  - Cascade does not pay for "No Shows" or "Late Cancellations", but they are counted against the client's allotted sessions. If a client Late Cancels or No Shows and is aware of your internal practice policies – you can bill the client direct according to your policy.



- To Whom - Enter the name or names of all the clients who attended the session. This isn't necessarily who is listed in the case detail information above, please report the names of all clients who attended the specific session date you are posting.
- Click save******
- Repeat from ****** to ****** for every session you are wanting to submit for payment. As you post sessions, you will start to see them in a list on the Service Time tab.

ONLY PROCEED WITH COMPLETING THE REMAINING TABS WHEN YOU ARE READY TO CLOSE THE CASE AND SUBMIT FOR PAYMENT. IF YOU ARE CONTINUING TO SEE THE CLIENT, DO NOT COMPLETE THE REST OF THE TABS.

2. <u>Question(s):</u> Some of our contracted companies look for additional information when cases are closed. If applicable, you may see questions on this tab that will need to be updated. The default answers will be "Waiting for provider report/case open" and <u>you will be required to answer these questions and save the page</u>. The only time you would not be required to complete this tab is if the client was referred to a different provider. You will see a note that says: "Unable to view because the case has been re-assigned".



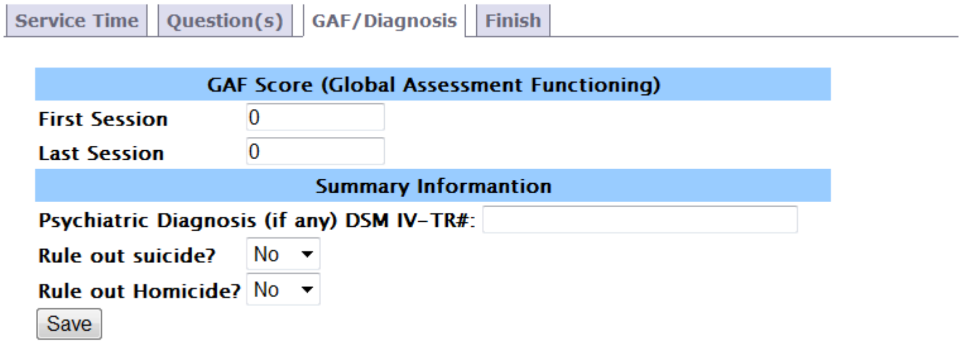
Question: "Case Disposition" - what happened when the case was closed:

- **"Cont'd with EAP Counselor"** – the client continues to see the same provider after allotted EAP sessions have been used.
- **"EAP Sessions Only" – issue was resolved within the allotted EAP sessions or the client did not use all the sessions when case closed. This is generally the most common answer.**
- **"EAP Sessions Then Referred to Other Resources"** – client referred to other resources in the community once some or all of the EAP sessions accessed.
- **"No Services Used – due to N/S, CX, or No Schedule" – only use this if the client never attended EAP sessions.** If client attended at least one session and then chose not to access the remaining allotted sessions, use "EAP sessions only".

Question: "Provider Identified Problem" – After seeing the client, what did you identify as the primary issue?

- If the client did not attend sessions, choose "Case Closed - N/S, CX, or No Sched".

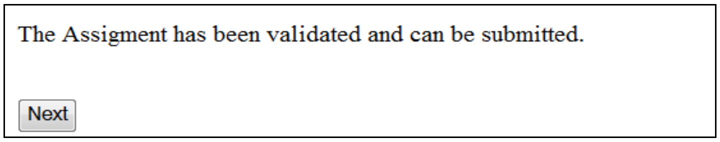
3. <u>GAF/Diagnosis:</u> complete all fields if you have seen the client for two or more sessions



- Report the two-digit first session and last session GAF (Global Assessment Functioning) scores for the case if more than one session is attended. If seeing a family or couples, report the score based on the situation and not on an individual person.
- Diagnosis is not required, but appreciated if you have a code.
- By default, the "Rule out suicide/homicide" questions state "no". Once you have ruled them out, change them to yes. If not ruled out, an email will be sent to our clinical director for follow up when the case is submitted.
- <u>You will be required to answer the GAF and suicide/homicide questions and then save the page</u>. The only time you would not be required to complete this tab is if the client was referred to a different provider. You will see a note that says: "Unable to view because the case has been re-assigned".

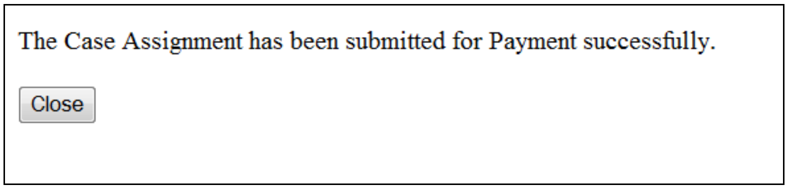
4. <u>Finish:</u> submit all sessions to Cascade for payment.

- **Verify dates of service under Service Time – are all of the session dates you want to bill for showing in the list? If not, enter the missing dates.**
- When you **click the "Finish" tab**, the system will validate the case and ensure all the required data is entered. If not, a comment will appear indicating any missing items. The missing items must be completed in order to submit the case.
  - If you posted service types that are not reimbursable (No Show or Late Cancellation) or didn't post any service time, you will be prompted that no payment will be sent.
    - **If this is accurate, you must continue the three-step Finish process in order to close the case.**
    - **If this is an error and you did provide counseling sessions, go back to the Service Time tab and enter in dates of service --- see page 13.**
- If the validation is successful there will be a message stating that the case may be submitted for payment – **click "next" to proceed**.



- The next screen is a verification screen to verify your billing information as entered in your profile. Changes can be made if necessary (Note any updates to location address must be reported to Cascade EAP directly, not through this form). Payment will be made to the account listed in your profile as of the closing date of the batch (25th of the month). Changes to your billing information after the cutoff will be applied to future payments. If there are no changes to be made **click on "submit for payment"** at the bottom of the window.

- The case has been submitted once you get the screen that states "The Case has been submitted successfully."



- **Once sessions have been submitted for payment the case status will change to "closed"**. Any remaining sessions on the referral will no longer be available through this assignment. If the remaining sessions are going to be used, **you must contact Cascade prior to seeing the client**. It is possible that after the case was closed, the availibility of the remaining sessions could be different. The client could have used their sessions with someone else; the company's contract year could have renewed and the client could be eligible for another referral; or the client's company could have terminated EAP services with Cascade.

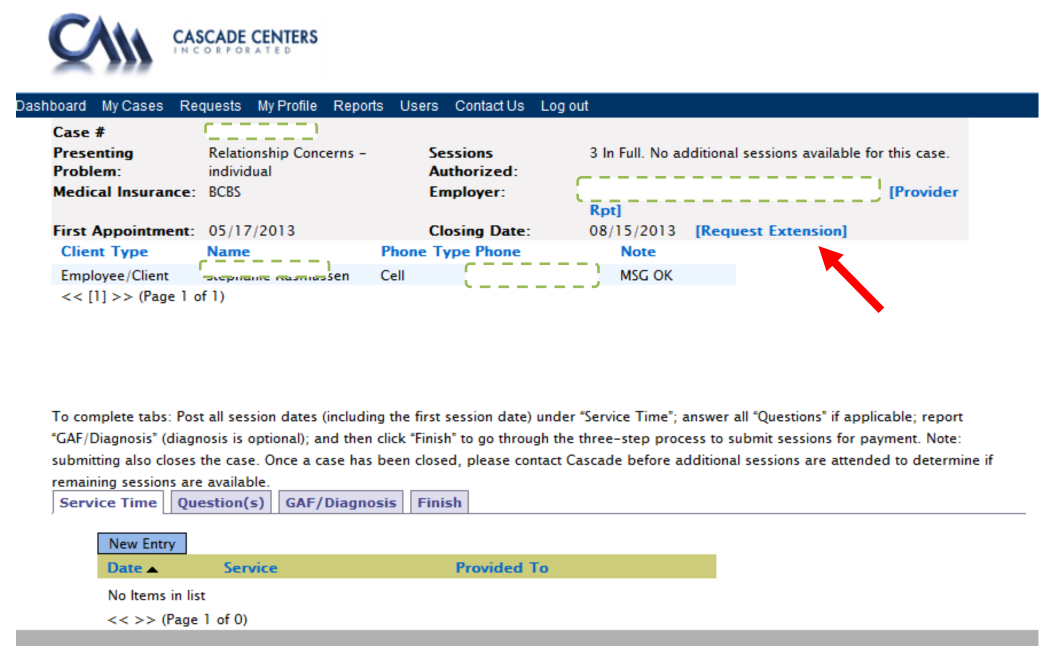
NOTE: If the clients did not attend any sessions – you still need to close out the case by submitting the case for payment. :

- Post the date of the initial appointment choosing "No Services Used – due to N/S, CX, or No Schedule".
- Enter "NA" for the name of the client you saw.
- You will still need to complete the rest of the tabs and submit through the three-step finish tab in order to "Close" the case.

Requesting Extensions

As the closing date on the assignment approaches, you will receive an email reminding you to submit your sessions for payment or to request to extend the closing date. **One of these two options must be done before the case's closing date.** You will also see the case listed on your Dashboard in the "Soon to Expire Cases" box. Extension requests can be made for 30, 60, 90 days. To request an extension on a case:

- With the case open, click on "Request Extension" in the information window



*Client information has been removed for the purpose of this screen shot

- The extension request window will pop up

- Use the drop down to determine the number of days you would like to extend and type in a brief description in the box provided.
- Click save
- You will receive an email notification when the status of the request changes.
- Track details of the request under the "Requests" option on the navigation bar.
- **Do not use this area to communicate with Cascade about anything other than to request closing date extensions. Use the Contact Us link or call our office for other problems or questions. If contacting Cascade after business hours or on the weekend, responses will be made on the next business day. Business hours: 8:00 am – 5:00 pm Monday through Thursday and 8:00 am – 4:00 pm on Friday. All times are Pacific Standard Time.**

Frequently Asked Questions

GUIDELINES FOR PROVIDERS

1. **Why can't I log in – I enter all my information, but when I hit "login" only my password disappears and I can't log in.**
   Any part of the log in information is typed incorrectly. Be sure it is exactly the same as the information provided by Cascade. Passwords are case sensitive. If you have changed your password and misplaced it, you must call Cascade and have it reset.

2. **I just logged in and cannot see my client on the list. Where is it?**
   The first page when you log in is the Dashboard and will only show "New" cases. New cases are cases that have not had the first appointment date "reported" to Cascade EAP yet by either the counselor or the client. Be sure you are looking at the "My Cases" list to see all cases. Only use the "Search by" box if you have many clients on the list.

   If you still do not see the client, it is possible that the initial case set up is missing information or has been referred to a different provider. **Contact Cascade via email or phone prior to seeing the client.** Otherwise, we cannot guarantee that the sessions are authorized through the EAP. A representative will review the case and determine if the assignment has been hidden, or other issues.

3. **Why do I have to report the first appointment date and also post it under service time? What is the difference and why do I have report it to you twice?**
   "Reporting" the first appointment date lets Cascade know the client has been assisted. Clients are guaranteed that they will be offered an appointment within 24-48 hours of their initial call. When the first appointment is reported to Cascade, the case is automatically removed from our call back list. All cases on the call back list that are over 24 hours old will have follow up calls from a Cascade staff member. Promptly reporting the first appointment date reduces follow up phone calls.

   Reporting the first appointment date also automatically generates the case closing date which is generally 90 days from the first appointment date (unless otherwise notified). The first appointment date cannot automatically be posted as a session under Service Time, because it is generally a date in the future, and not known if the client actually attended the session until after the date of the session.

4. **What happens if I report a first appointment date and then the client is able to get in sooner? How do I change the first appointment date?**
   Please contact Cascade by phone or email. We will adjust the date.

5. **I am trying to post service dates, but I get an error that states the session must fall within a specific time frame. What do I do?**
   Verify the date you are entering. Sessions prior to the "reported first appointment date" are not authorized, unless authorized by Cascade's Clinical Director. If the first session date on the assignment has changed or you have other questions, please contact Cascade direct.

6. **I am trying to submit more sessions on a case, but it says it is "closed." What do I do?**
   Once sessions have been submitted, the case is closed. You must contact Cascade before seeing the client again to access remaining sessions. If you do not contact Cascade prior to seeing the client again, we cannot guarantee the sessions will be covered.

7. **There is a tab that says "Questions" but there is nothing in there.**
   Not all client employers ask for questions to be answered.

8. **What happens if a client doesn't attend sessions and the case is still "open" in Provider Advantage?**
   The case will need to be closed. To do this:
   - Go into the case
   - Go to Service Time and create new entry
     - Post one entry using the date of the initial appointment date, change the drop down to "No Services Used – due to N/S, CX, or No Schedule", and enter NA under who was seen.
   - Check to see if there are Questions to answer for the company
     - If there are questions to answer, change them from "Waiting for Provider Report/Case Open" to "Case Closed - N/S, CX, or No Sched"
   - GAF/Diagnosis tab – no information is necessary here
   - Finish case / submit for payment through the three-step Finish tab.

9. **How do I know if I submitted my sessions to you / did you get them?**
   There are multiple ways to determine if a case has been submitted successfully.
   - Once you have clicked completely through the "Finish" process, a message will appear that states the case has been successfully submitted for payment.
   - The case will be listed as "closed" in the "My Cases" list.
   - Go to "Reports" and locate the report for the date range in which you submitted the sessions. View the report and check the payment details.

10. **I have submitted sessions for payment, when will I get paid?**
    Payments are made once a month. All sessions submitted through 11:59 PM on the 25^{th} will be paid around the 10^{th} of the following month. If the 10^{th} is on a weekend, it will be adjusted to the closest business day.

11. **I received an email notification stating I have been paid, how do I know who I got paid for?**
    Go to "Reports" in the navigation bar. Locate the period of time you submitted the case sessions and click "view". The report will break down the total payment by client.

12. **When I try to view Payment Report nothing happens.**
    The report is generated as a PDF in Adobe Reader. You must have Adobe Reader on your computer to be able to view the report. Adobe Reader is a free program that can be downloaded at **http://get.adobe.com/reader**.

13. **If a client No Shows or Late Cancels do you pay for the sessions?**
    Cascade does not pay for late cancellations or no shows, but it can be counted against the client's allotted EAP sessions. If the client is aware of your internal policies around late cancellations and no shows, you can bill the client directly as per your policy.

14. I have contacted your office and have not gotten a response. What do I do?
If contacting Cascade after business hours or on the weekend, responses will be made on the next business day. Business hours: 8:00 am – 5:00 pm Monday through Thursday and 8:00 am – 4:00 pm on Friday. All times are Pacific Standard Time.

15. I am trying to submit sessions but it states it is after the closing date. What do I do?
Daily email notifications are sent to providers starting 15 days before the closing date reminding providers to submit their cases or request an extension. If sessions still aren't submitted by the closing date you must contact Cascade. We will determine if you have used the one time exception that is offered to all providers.