Facility Services Web Portal

User's Guide

Modivcare Solutions, LLC
Version 1.2.0
Updated 8/15/2012

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Document Revision History

Version	Date	Description of Changes
1.0.0	02/04/2011	Beta release of FSW
1.0.1	04/27/2011	1.0.1 beta updates
1.0.3	09/01/2011	Minor revisions; Assistance Type, Usual Level of Service, Escort field and Preschedule days settings
1.0.5	01/05/2012	Minor revisions and re-branding to portal
1.1.0	04/07/2012	Added configurable fields
1.1.1	04/12/2012	Added Medical Necessity Form
1.1.2	05/31/2012	Updates for using Medical Necessity Form
1.2.0	08/23/2012	Added auto-fill capabilities

Contents

Overview of the Modivcare Facility Services Web Portal

Modivcare is a transportation management company, with operations centers nationwide, managing over 2 million transports per month. Modivcare coordinates requests for non-emergency medical transportation (NEMT) on behalf of Medicaid and Medicare members and the health care facilities, medical groups, and hospitals serving those members.

The Modivcare Facility Services Web (FSW) portal supports transportation requests by healthcare facilities on behalf of their clients. The goal of this portal is to provide a system to request and manage trip requests online—without the need to call the call center.

The Facility Services Web lets you:

- Enter a single trip or standing order request for review and approval by a Modivcare Facility Representative
- Look up and view trip requests
- Modify or update pending requests
- Withdraw pending requests
- Manage Facility Services Web user accounts

The secure login function, data encryption, and other security features are designed to protect your clients and your organization. The Modivcare Facility Services Web portal meets all requirements of the Health Insurance Portability and Accountability Act of 1996 (HIPAA) regarding Protected Health Information (PHI) to ensure the privacy and security of your data.

About this Guide

This guide explains how to use the Facility Services Web portal to enter, modify, and view requests for trip reservations and standing orders. It explains

- System requirements

- Processes to request reservations or standing orders

- Important terms and concepts

Tips for Using the Facility Services Web

This guide assumes that you are familiar with basic computer and Internet concepts, but here are some tips that will help you enter and review your trip requests more efficiently.

Moving between Fields

One way to move the cursor from one field to another is to use your mouse. Another method that you may find faster is to use the TAB key on your keyboard.

Using Shortcut Keys

Rather than clicking menu items or icons, use your keyboard to open drop down lists. Press the ALT + DOWN ARROW keys to open drop-down lists, and then use the UP ARROW and DOWN ARROW to move through the list.

Using Auto Complete

To select entries from a list, you can enter the first letter or first few characters. The system automatically completes the field with the first selection that matches your criteria. For example, if you enter "N" in the relationship field, the system fills in "Neighbor," which is the first possible match. You can use the down arrow to see the other possible matches, such as Nephew, Niece, and Nurse.

Using Auto Fill

Some fields will automatically be filled with data about you, the rider, or the request you entered previously.

- When a new request is entered, trip details and trip leg fields will be filled in automatically with information about the Rider or Facility that is known by Modivcare.

- After a request is entered, some data about you will be stored and reused when you enter the next request.

- After you enter a request, you can enter another request for the same user and reuse information about that user and request to complete the next request. Or, you can enter a request for a different member and reuse the information you entered about the trip date, facility, and other details.

Entering Formatted Fields

Some fields, such as member IDs, phone numbers, and dates, are formatted so you only need to enter the numbers or letters. Fields for phone numbers will show the dashes and date fields will show the slashes between the entries. You do not need to enter any dashes, slashes, or other separators. For example, you can enter 3015554420 in a phone number field and the system formats your entry as 301-555-4420.

Entering Dates and Using the Calendar

To enter dates, you can enter the date directly into the text box, which is formatted as __/__/___ _ so you don't need to enter any separators. Just remember to add zeros if the day or month is a single digit. For example, you can enter June 5, 2012 as 06052012.

Another way to enter a date is to use the calendar. The calendar opens automatically when you use the TAB key or click to enter a date. Click on the date in the calendar or click the arrows at the top of the calendar to scroll through the months and years if necessary.

Getting Help

If you need help with a request, have a question about a request or reservation, need to request an urgent trip, or need to cancel an existing reservation, contact your Modivcare Facility Representative.

If you need technical assistance, select **Contact Support** on the **Help** menu. Use the e-mail form to contact Modivcare Customer Support. Support hours are Monday through Friday 8:30 AM to 5:00 PM Eastern time. Please allow up to four business hours for a return call or e-mail.

Getting Started

This section explains what you need to access the portal and how to login using your user information. To get started using Modivcare's Facility Services Web, you will need Internet access and your user information.

System Requirements

To access the Facility Services Web portal, you must have a PC with an Internet connection and a supported web browser. The portal supports the following web browsers:

- Microsoft Internet Explorer (IE) Version 6 or higher with 128-bit Secure Sockets Layer (SSL) encryption installed and enabled.
- Mozilla Firefox Version 2.0 or higher with 128-bit Secure Sockets Layer (SSL) encryption installed and enabled.

For best results, the most current version of IE or Firefox with the latest security updates should be used.

The remainder of this document assumes you are using Microsoft Internet Explorer (IE) to access the portal. All instructions are based on IE, however, Firefox will work in a similar manner.

Accessing the Facility Services Web portal

To access the Facility Services Web portal, establish your Internet connection and open your browser. In the Address line of your browser, enter the Internet address http://facility.Modivcare.com/ and then press ENTER or select the 'GO' action.

TIP! You can save the Facility Services Login page as a Favorite web location. On the Favorites menu in your browser, select the Add to Favorites option.

The Login page also provides notices of scheduled maintenance or system updates.

Logging in to the Facility Services Web portal

To log in to Facility Services, you will need the User Name and Password that you received from Modivcare when you signed up for the portal or from your system administrator or manager.

NOTE: Do not use another person's User Name and Password. Make sure you are using your own User Name and Password.

To log in to the Facility Services Web portal:

1. Enter your **User Name**.

2. Enter your **Password**. Your password is case sensitive.

3. Press ENTER or click **Login**.

The first time you log in to the Facility Services Web portal, you must change your password and answer at least one "challenge" question that will be used to verify your identity if you forget your password.

Changing Your Password

The first time you log in to the system, you are required to change your password. This is a security feature designed to protect you, your facility, and your clients.
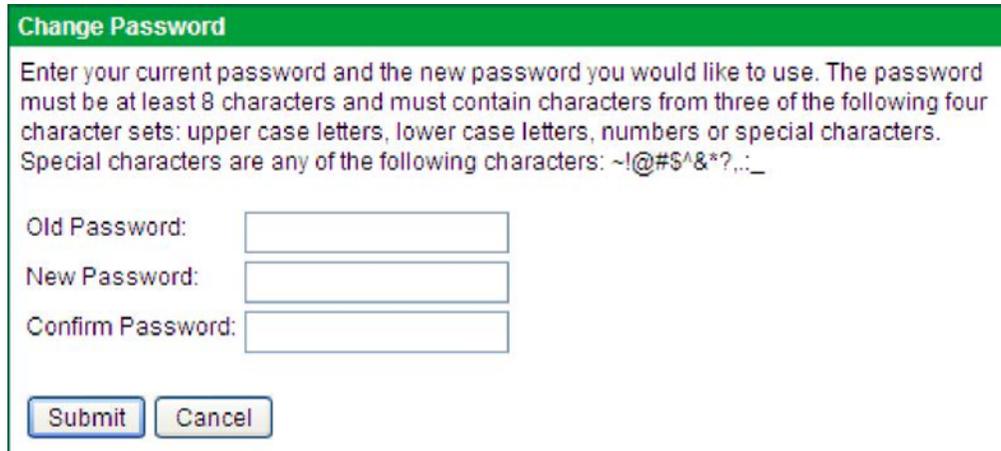
Change Password

Enter your current password and the new password you would like to use. The password must be at least 8 characters and must contain characters from three of the following four character sets: upper case letters, lower case letters, numbers or special characters. Special characters are any of the following characters: ~!@#$^&*?,.:_

Old Password:

New Password:

Confirm Password:

[Submit] [Cancel]

1. Enter your current password in the **Current Password** field. This is the password you just used to log in to the Facility Services Web portal.

2. Enter a new password in the New Password and then in the **Confirm Password** fields. Your new password must follow these rules:
   ı It may not be the same as your current password or any of your previous 5 passwords.

   ı It must be at least 8 characters long.

   ı It must contain characters from 3 of the following 4 groups:

      o Uppercase letters **A-Z**

      o Lowercase letters **a-z**

      o Numbers **0-9**

      o Special characters **~ ! @ # $ ^ & * ? , . : _**

3. Tab to the **Submit** button and press ENTER, or click **Submit**.

Submitting Your Challenge Questions

Challenge questions are a security feature used to validate your identity when you need to reset your password. These questions are designed so the answers are easy for you to remember, but hard for someone else to guess.

To submit your challenge questions:

1. Enter the answer to at least four of the challenge questions. Questions you answer are selected at random to use as the challenge questions if you forget your password.

2. Click **Submit** to save your answers.

You can change or update your security questions at any time.

The Facility Services Home Page

The Home page provides you with a snapshot of the current trip requests, and includes notifications and news of scheduled updates, maintenance, and system changes.

Navigating the Portal

From the **Home** page, use the menu at the top of the page to open the reservation request forms, view existing requests, and manage your Facility Services account. The menu is accessible from every page in the portal.

NEW RESERVATION opens the form to enter a new trip request.

NEW STANDING ORDER opens the form to enter a new standing order request.

MY REQUESTS opens the My Requests page where you can search for trip requests by date, status, or member.

MY REPORTS opens the Reports page. Reporting will be added in the future, but no reports are available at this time.

MY PROFILE provides links to change your password and challenge questions.

ADMIN opens the User Management page where master facility users can add and manage user accounts. This option is available only to users with administrative permissions.

HELP provides access to this User's Guide and information about how to contact Modivcare for additional support. The Help menu also include the **Forms and FAQ** link to the Modivcare Facility Resource Site, which provides state-specific forms and information.

LOGOUT logs you out of the Facility Services Web and returns to the Login page. You should always log out of the portal when you are not working in the system. As a security measure, you are automatically logged out after a period of inactivity.

Dashboard

The Dashboard summarizes the trip requests that you can manage by date and status. The display shows requests up to the next 90 days starting with the current date. The trips you can see depend on the permission levels set up at your facility.

Date of Service	Pending	Rejected	Approved	Denied
12/29/2010	0	0	6	0
12/30/2010	0	1	8	0
12/31/2010	0	0	0	0
1/3/2011	0	0	7	0
1/4/2011	1	0	0	0
1/5/2011	3	Click to open on My Requests page		0
1/6/2011	1	1	8	1
1/7/2011	4	0	1	0
1/10/2011	3	0	0	0
1/11/2011	4	0	0	0

1 2 3   Page Numbers

The list shows 10 days per page. Click the page numbers at the bottom of the list to view additional dates.

Click any of the underlined numbers under Pending, Rejected, Approved, or Denied to open the My Requests page and view the requests for the selected date and status.

Modivcare Facility Services Updates

Notices of scheduled maintenance and system updates are displayed at the bottom of the **Home** page, and the link to **View All News and Updates** lets you review current and previous notices.

Entering New Requests

To request a trip for a client, you will enter a new reservation or a new standing order. Select **NEW RESERVATION** from the menu to enter a new request for a single trip.

Selecting the Member

Before you can enter or modify any request or reservation, you need to select the correct member. When you select **NEW RESERVATION**, the **Find Member** dialog opens. All three fields are required to select the member requesting a trip.

1. Enter the **Member ID**. You do not need to enter any dashes or other separators used in the ID number.

2. Enter the **Member Last Name**. You do not need to capitalize the name, but it must be spelled correctly.

3. Select the member's **Insurance Type** from the list.

4. Click **Search**.

If the member is found, the Request a Reservation page opens and displays the member information at the top of the request form.

If there is no match to the criteria you entered, verify your entries, and then retry your search. If you are unable to locate the member record, call your Modivcare Facility Representative to submit your trip request.

Entering the Trip Details

The Request a Reservation page displays the Member ID, Name, Date of Birth, Gender, and Insurance Type in the Member section at the top of the form. Take a moment to verify that you have selected the correct member before completing the request.

Member						
Member ID	First Name	Middle Name	Last Name	Date of Birth	Gender	Insurance Type
004-62-9762	CANDACE	L	DAVIS	11/23/1983	F	ACME Health Plans

Requested By

*Name	Relationship	*Contact Phone Number
Perry Pennington	<NONE>	405-691-9004

Notification E-Mail:
perryp@facility.com

Fax Number
___-___-____

Reservation

*Date of Service

Level of Service

*Level of Service

National Provider Information

*National Provider Identifier
1083617055

*National Provider Name
OKC Rehabilitation Center

Escorts

Number of PCAs	Number of Adult Escorts	Number of Child Escorts	Number of Child Car Seats
0	0	0	0

Patient Condition

*Nature of Appointment
rehab

Patient Condition

*Treatment Type
Cardiac Rehab

Procedure Code(s)

Additional Information for ACME Health Plans

Does the building have a ramp?
Select Item

Where is the ramp located?
Select Location

Preferred Transportation Provider

Preferred Transportation Provider
Sooner Transit

Comments

Additional Comments

[Continue]

As you enter the trip information, the system processes certain fields to determine if additional information is needed. During these times, you will see the Please Wait processing message.

Complete the fields on the first page of the reservation request.

When you enter a new request, some fields in the trip details may be filled in automatically with information that Modivcare has one file about the facility you are associated with and the member requiring transportation. These fields include:

- Contact Phone Number (phone number for your facility)
- National Provider Identifier and Name (for your facility)
- Level of Service (member's usual level of service)
- Requested Transportation Provider (member's preferred transportation provider)
- Pick Up Address and Phone Number (member's residence address)
- Drop Off Address and Phone Number (for your facility)

As you work in FSW, some information may be stored after you enter a request and then reused during your session. This information may be different from the information that was prefilled from the facility or member data. For example, the phone number for your facility may be prefilled, but you may change it to your direct number. This information is not saved if you log out or disconnect from the FSW portal. Additional fields that may be prefilled in a request based on information that you enter include:

- Requested By fields (Name, Relationship, Contact Phone Number, Notification E-mail, Fax Number)
- National Provider Identifier and Name
- Treatment Type
- Trip Leg A Drop Off Address, Phone Number, Physician

Depending on the member's location and insurance type, additional fields may be displayed and required. These fields are usually located in the Additional Information section on the request page.

Fields listed in the following table in bold font are typically required to complete a reservation request. **Required fields are indicated on the reservation form with an asterisk *.**

Requested By	
Name	Your name is filled in from your login information.
Relationship	Select your relationship to the member.
Contact Phone Number	Prefilled with your facility phone number if it is available. Enter your 10-digit phone number. Include the area code, but do not add any separators.
Notification E-Mail	Prefilled from your user profile.

| Fax Number | Enter the 10-digit fax number that can be used to notify you or your client about the trip. |

Reservation

| **Date of Service** | Enter a date up to 90 days in advance.
Use the MMDDYYYY format or click the field to open the calendar and select the date. You do not need to enter the slashes or separators, but include zeros for single day and month entries. For example, enter May 5, 2012 as 05012012. |

Level of Service

| **Level of Service** | Select the service required on this trip from the list. If the Level of Service is other than Ambulatory, you may need to submit a Transportation Justification Request, also called a Medical Necessity Form, in order for Modivcare to complete the request. |

National Provider Information

| National Provider Identifier | Prefilled with your facility information if available. Enter the National Provider Identifier (N PI) for the ordering medical provider. This information is required for certain member programs. |
| National Provider Name | Prefilled with your facility information if available.
Enter the name of the ordering medical provider. This information is required for certain member programs. |

Escorts

Number of PCAs	Select the number of Personal Care Attendants authorized for this trip.
Number of Adult Escorts	Select the number of adult escorts for this trip.
Number of Child Escorts	Select the number of children who will be accompanying the rider on this trip.
Number of Child Car Seats	Select the number of children's car seats required for this trip.

Patient Condition

Nature of Appointment	Enter a brief description of the treatment or service, such as clinic visit, dialysis, pharmacy visit, or dental appointment.
Patient Condition	Enter a brief description if this client requires a level of service other than Ambulatory, such as "confined to wheelchair."
Treatment Type	Select the type of treatment the member will be receiving from the list.

Procedure Code(s)	Enter the procedure codes if known.
Can Member sign the driver's log? Is the member's inability to sign the log permanent? Please explain why the member's inability is permanent.	Optional questions to determine if a rider can sign the log. Click **Yes** or **No** to indicate if the member will be able to sign the driver's trip verification form. If the member is unable to sign, click **Yes** or **No** to indicate if this is a permanent situation. If the member's inability to sign is permanent, provide a brief explanation.

Additional Information

This section contains any additional information requested by the member's insuring agency.

Preferred Transportation Provider

Prefilled from the rider's preferred provider if available.
Enter the preferred transportation provider for this member if one is requested.

Comments

Enter any additional comments, directions, escort information, or instructions.

Click **Continue** to open the trip leg page.

Before opening the trip leg page, the system validates the required entries. If a required field is not entered or an error is found, the field name is shown in red and an error message is shown under the Continue button. Correct any errors and then click **Continue** again to recheck your entries and open the trip leg page.

Entering the Trip Legs

Trip Leg A is the first section of the trip, from the initial pick up to the drop off location. Fields shown with the asterisk ***** are required.

The member's address will be prefilled in the Pick Up location fields if it is available, as many trips are made from the member's home to the facility. Your facility information will be prefilled in the Drop Off location fields if it is on file with Modivcare.

Prefilled fields are not active and cannot be edited directly. To make a change to the Pick Up or Drop Off location, select Look Up or Enter Manually to select or enter the location.

PICK UP		
Look Up or Enter Manually		The member's address is automatically entered as the default pick up location if the residence address is found in the Modivcare system. The address fields are shaded and cannot be edited.
		If the address is not found or the pick-up location is not the member's residence, you can use the Look Up function or enter address manually.
Look Up		The Look Up button is the default selection. Click the **Look Up** icon to open the Location Look Up. Refer to the Using the Location Look Up section in this User's Guide for details on using this tool.
Enter Manually		Select **Enter Manually** to access the location fields and manually enter the pick up address.
	Note	Addresses that you enter manually are validated in the Modivcare system when you save the trip leg. After validation, a message may display that gives you the option to choose a validated address or to continue with the unverified address that you entered.

This address could not be verified.
Please select an option below.

○ 407 3rd St, Broken Bow, AK 77728-4123

☐ Use the Unverified Address
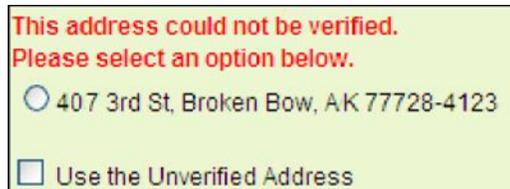
*From Location Name ***From Location Type**	**Required.** The **Location Name** is automatically filled when you select a location using the Location Look Up tool. If you are manually entering the pick up location, select the **Location Type** from the list.
*Address	**Required.** Enter the street address of the pick up location.
*City	**Required.** Enter the city name.

*State	**Required.** Select the state or territory.
*Zip	**Required.** Enter the five-digit zip code.
Name of Doctor	Enter the name of the physician or specialist being seen if this is a medically related trip.
Directions for the driver	Enter any information that will help the transportation provider find this location.
Requested Pick Up Time	Enter the requested pick up time and then click AM or PM. Enter the time using leading zeros if necessary (09:00). The actual pick up time scheduled by Modivcare for the A leg of the trip is based on the appointment time and other trip information used to generate the reservation.
Building	Enter the specific building at the street address entered.
Apartment	Enter the specific apartment or suite at the address entered.
*Phone Number	**Required.** Enter the phone number at the pick up location if it has not been prefilled with the member's phone number.
Extension	Enter any extension for the number at the pick up location.

DROP OFF

Look Up or Enter Manually	Your facility information is automatically **Look Up** is the default selection. Click the **Look Up** icon to use the Location Look Up or click **Enter Manually** to type in the drop off address.
*To Location Type ***To Location Name**	**Required.**
*Address	**Required.** Enter the street address of the drop off location.
*City	**Required.** The city name.
*State	**Required.** Select the state or territory.
*Zip	**Required.** Enter the five-digit zip code.
Name of Doctor	Enter the name of the physician or specialist being seen if this is a medically related trip. Enter the name as First Name Last Name or Last Name, First Name. Do not include Dr. or any other titles before the name.

Directions for the driver	Enter any information that will help the transportation provider find this location.
*Appointment Time	Enter the time of the member's appointment and then click AM or PM. Enter the time using leading zeros if necessary (09:00). If you enter 24-hour (military) time, such as 13:30, it will be converted to AM/PM when you save the reservation. The actual pick up time scheduled by Modivcare is based on the appointment time and other trip information used to generate the reservation.
Building	Enter the specific building at the street address entered.
Apartment	Enter a specific apartment or suite at the address entered.
*Phone Number	**Required.** Enter the phone number or the number at the drop off location.
Extension	Enter the extension for number at the drop off location.

Signature

Check the box and type your name to provide your "digital signature" and confirm the accuracy and validity of this trip request.

Note: You do not need to enter the digital signature until you have entered all of the trip legs and are ready to submit your request.

When you have entered the information for Trip Leg A, you can create a round trip, add multiple trip legs, or submit the request for a one-way trip.

- For most trips, you will want to create a second trip leg, Trip Leg B, to get the member from the drop off location back to their residence. Click the **Create Round Trip** button to copy the information from Trip Leg A and create Trip Leg B for the member's round trip.

- In some situations, the member needs transportation to multiple locations on the same day. This requires a reservation with multiple legs. Click the **Next Trip Leg** button to copy the drop off information from Trip Leg A and open Trip Leg B. After entering the Trip Leg B, you can repeat the process to enter additional legs (C, D, etc.).

- In some situations, you may have a one-way trip and do not need to enter another trip leg. Click **Submit Request** to submit your request and click **OK** at the prompt to confirm that this is a one-way trip.

When you click **Create Request** or the trip leg icons, the system validates the required fields. The field names for any entries that you need to correct change to red and the error messages display below the Create Request button. Make your corrections and then click **Create Request** or the trip leg icon again. The system rechecks your entries and creates the request or opens the next trip leg page.

Adding Additional Trip Legs

Additional trip legs follow the same format you used when you entered Trip Leg A with a few exceptions. The new trip leg uses the Drop Off location from the previous leg as the Pick Up location.

Enter the **Requested Pick Up Time** when the member should be picked up at this location or check **Will Call** if the member will call Modivcare when they are ready to be picked up for this leg of the trip.

Enter the **Drop Off information** for this leg. Enter the Appointment Time for this trip or check **Will Call** if the member will call Modivcare for a return time for this leg of the trip.

Click the **Next Trip Leg** button to copy the drop off information from the current leg and open the next leg of the trip.

To remove a trip leg, click the **Cancel** button. This removes the current leg without changing any other trip legs.

When you have entered all of the trip legs, enter your **Signature** and then click **Create Request** to validate your entries and submit the trip request.

If you need to submit a **Transportation Justification Request (Medical Necessity Form),** the form may be displayed when you submit the reservation.

Trip Request Confirmation

When you have completed your entries and saved your request, the Confirmation page provides a summary of the trip, and displays the trip request number at the top of the page.

To see additional trip details or to make any changes to the request, click the **View all details** link at the end of the confirmation notice to open the Trip Details page.

From the Confirmation page, you can choose to create another request for the same member or for a different member. Click the appropriate link to enter another request for the same member or for a different member.

Entering Additional Requests

From the Confirmation Page, you can choose to enter a new request for the same member or enter a new request for a different member. Information from the request you just entered is used to prefill some of the fields in the request when you use one of these options.

Creating a New Request for the Same Member

When you click the link on the Confirmation page to create a new trip request for the **same member**, you do not have to select the member again; the request page automatically opens. All fields in the request and in Trip Leg A are filled *except the date of service*.

You can edit or change any information for the new request, and complete the trip by selecting a round-trip or adding additional trip legs.

Creating a New Request for the Same Member

When you click the link on the Confirmation page to create a new trip request for a **different member**, the Find Member page opens so you can select the member. When you have selected the member and the request page opens, the request details and Trip Leg A fields that are not *member specific* will be automatically filled with the information that was entered in the previous request.

Fields that will be prefilled in the request for a different member include:

- Requested By fields
- Date of Service
- National Provider Identifier and Name
- Level of Service (member's usual level of service)
- Patient Condition (Nature of Appointment and Treatment Type)
- Drop Off Address and Phone Number

Fields that are considered member specific and will *not* be prefilled include:

- Level of Service
- Escorts
- Residence Address
- Appointment Time
- Requested Pick Up Time

You can edit or change any information for the new request, and complete the trip by selecting a round-trip or adding additional trip legs.

Using the Location Look Up

The Location Look Up let you quickly look up the addresses of healthcare facilities and other locations. In the Pick Up or Drop Off section of any trip leg, select **Look Up** and then click the **Look Up** icon to open the Location Look Up.

Search by Location Type

The look up by Location Type displays when you open the Look Up tool, with two options: Residence and Facility.

The **Residence** option searches the Modivcare system for address of the rider's residence.

The **Facility** option displays the facilities that you are associated with. These associations are part of your user setup and managed by the FSW Administrator.

1. Select **Facility** or **Residence** from the list and then click **Search**.

2. Use your mouse or the ARROW keys to scroll through the results list.

3. Click the button next to the location name to select it, and then click **OK** to populate the location address in the trip leg.

Click **Cancel** to return to the trip leg without selecting any location and manually enter the Pick Up or Drop Off information.

Search by Location Name

The search by Location Name lets you search for locations by entering all or part of a facility name. The results are based on the member's insurance type and show the facilities associated with that agency that match your search criteria.

1. Enter all or part of the facility name and then click **Search**. All results that match your entry are listed alphabetically.

2. Click the button next to the location name to select it, and then click **OK** to populate the location name and address in the trip leg.

Click **Cancel** to return to the trip leg without selecting any location and manually enter the Pick Up or Drop Off information.

Search by Address

The Address Look Up helps you identify the facilities located at a specific address. To search by address, you must know the complete address.

1. Enter the Zip Code, street address, city, and state. You must enter an exact match, including the correct street designation (Dr., St., or Ave., for example.)

2. Click **Search** to see all facilities located at that address.

3. Click the button next to the location name to select it, and then click **OK** to populate the location name and address in the trip leg. .

Click **Cancel** to return to the trip leg without selecting any location and manually enter the Pick Up or Drop Off information.

Entering a Standing Order

A standing order is used to arrange trips in advance for a client who is scheduled for trips three days or more a week to the same location. For example, treatments such as dialysis, adult day care, or physical therapy might require a standing order.

A Standing Order is good for up to three months and then must be recertified by Modivcare to make sure the trip continues to be necessary.

Select **NEW STANDING ORDER** from the menu. The information required for a Standing Order request includes most of the same member and trip fields required for a new trip request. Review the sections in this User's Guide on Entering New Requests and Using the Location Look Up for more details about the required entries.

Additional information necessary for a Standing Order includes the start date and the days of the week that the trip is required. The specific fields for a new standing order as grouped in the section marked Standing Order, and the fields shown with the asterisk * are required.

Standing Order

*Start Date of Service	**Required.** This is the first date that the preschedule will become a reservation. This date must fall on one of the **days of the week for this trip.** The Start Date of Service must be at least 5 business days after the current date to allow for Modivcare processing.
	Use the MMDDYYYY format or click the field to open the calendar and select the date. You do not need to enter the slashes or separators, but include zeros for single day and month entries. For example, enter May 5, 2012 as 05012012.
End Date of Service	If the standing order has an end date, enter the last date for a trip reservation. If the standing order is indefinite, leave this field blank.

Maximum Number of Trips Enter the number of trips authorized for this standing order. If the standing order is indefinite, leave this field blank.

*Days of Week **Required.** Check the days of the week that the trips will be made.

After entering the rider information, enter the trip leg details. When you have completed the Standing Order request and entered your digital signature, click **Create Request** to save your request.

If the Level of Service is other than Ambulatory, you may need to submit a Transportation Justification Request. If it is required, the request page is displayed when you submit the reservation.

Standing Order Request Confirmation

When you have completed your entries and saved your request, the Confirmation page provides a summary of the standing order and displays the request number
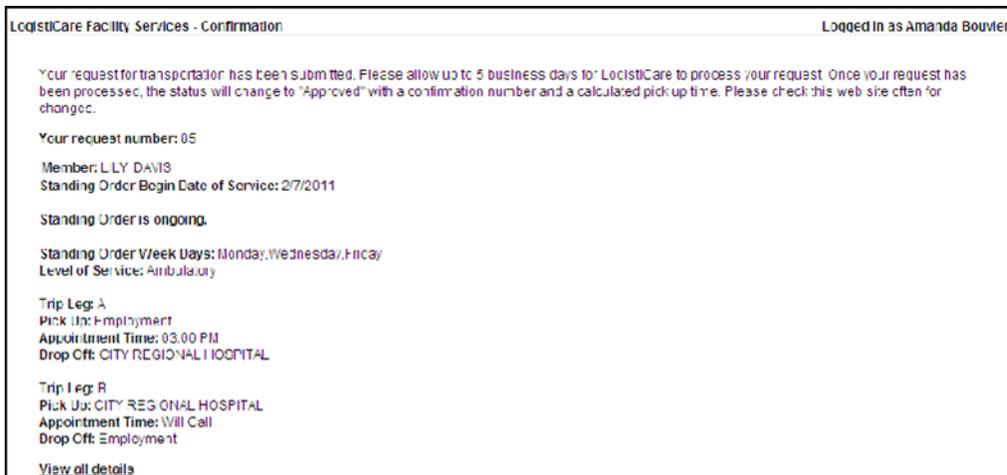
To see additional details or to make any changes to the request, click the **View all details** link at the end of the confirmation notice to open the Trip Details page.

Entering a Medical Necessity Form

A member may require an advanced Level of Service or a specific, medically necessary mode of transportation. In this case, you must submit the Transportation Justification Request (also known as a Medical Necessity Form) to support the order for a particular mode of transportation.

Because the form can cover many trips during the authorized period, the Modivcare system is checked to determine if a valid form has already been submitted. In this case, the existing authorization will cover the trip and you will not be required to resubmit a form.

If there is not a valid authorization on record with Modivcare, you must submit the certified form before you can submit the on demand or standing order request.

Form 2015 (2/2012)　　　　TRANSPORTATION JUSTIFICATION REQUEST　　　　New York State Department of Health

Patient Name: Reed, Emmanuel　　　　Date of Birth: 6/7/1998　　　　Medicaid Number: AB12345C

Start Date: 3/28/2012

1. Please check the medically necessary mode of transportation:

○ Livery: The enrollee can walk to the curb and board and exit the vehicle unassisted, but cannot utilize the bus or subway.

○ Ambulette Ambulatory: The enrollee can walk but requires driver assistance from residence to the medical appointment.

○ Ambulette Wheelchair: The enrollee is a wheelchair user, requires a lift-equipped or roll-up wheelchair vehicle and driver assistance.

○ Stretcher Van: The enrollee is confined to bed, cannot sit in a wheelchair, and does not require medical attention/monitoring during transport.

○ BLS Ambulance: The enrollee is confined to bed, cannot sit in a wheelchair, and requires medical attention/monitoring during transport for reasons such as isolation precautions, oxygen not self-administered by patient, sedated patient.

○ ALS Ambulance: The enrollee is confined to bed, cannot sit in a wheelchair, and requires medical attention/monitoring during transport for reasons such as IV requiring monitoring, cardiac monitoring, tracheotomy.

2. Please justify the mode of transportation chosen above:

3. Is the requested mode of transport a long term need of the patient, or temporary?

○ Long Term
○ Temporary
　　If temporary, please enter the end date:

Physician: Dr. James Patterson　　NPI#: 1223334444　　Phone:　　　　Date: 03/28/2012

Facility Name: ABC Health Facility

Completed By: Warren Peace　　Title:　　　　Phone: (555) 681-7337

☐ CERTIFICATION STATEMENT: I (or the entity making the request) understand that orders for Medicaid-funded travel may result from the completion of this form. I (or the entity making the request) understand and agree to be subject to and bound by all rules, regulations, policies, standards and procedures of the New York State Department of Health, as set forth in Title 18 of the Official Compilation of Rules and Regulations of New York State, Provider Manuals and other official bulletins of the Department, including Regulation 504.8(2) which requires providers to pay restitution for any direct or indirect monetary damage to the program resulting from improperly or inappropriately ordering services. I (or the entity making the request) certify that the statements made hereon are true, accurate and complete to the best of my knowledge; no material fact has been omitted from this form.

All fields on the Transportation Justification Request are required and must be completed to submit the request.

To enter the justification and submit the form:

1. Change the **Start Date** for this request if necessary. The date defaults to the current date.

2. Check the type of transportation that is medically required by this member.

3. Enter the reason this mode of transportation medically necessary.

4. Indicate if this is a long term or temporary requirement. A long-term request is generally indicated for members having chronic conditions while a short-term authorization is used for members experiencing acute conditions. If this is a temporary request, enter the end date for this request.

5. Enter the information that identifies the physician who is certifying this request. The name and N PI are prefilled from the reservation or standing order request if the fields were entered there.

   ı Physician name

   ı National Provider Identifier (NPI) number

   ı Phone number

6. Select the Facility from the list. The facilities listed are based on the available facilities selected for you by your facility site administrator.

7. Enter your title. Your name and phone number are auto filled based on your login and the telephone number you entered in the contact information on the reservation or preschedule request.

8. Click the checkbox for the Certification Statement to verify that the information entered is accurate and complete.

9. Click **Create Request** to submit this form to Modivcare along with the reservation or standing order request.

Finding and Viewing Trip Requests

You can look up trip requests that you have entered for your clients and trip requests entered by others at your facility. The FSW user management system is set up so you can view and edit requests created by:

ꞁ Your FSW manager

ꞁ Other users under your manager

ꞁ Users that you manage

You can search for any past or future request, but the search is limited to a 30-day range based on the start date and end date that you enter.

Your search results will list trip requests according to the date, status, and member search criteria you enter. From the list, you can open individual requests to make changes or corrections or to withdraw the request.

To search for trip requests:

1. Select **MY REQUESTS** from the main menu to open the Search for Trip Requests page.

2. Enter the **Start Date**. The default selection is today's date. Enter the date using the MMDDYYYY format. No slashes or dividers are necessary. You can also click the date field to open the calendar and select a date.

3. Enter the **End Date**. The default selection is 30 days from today's date. 30 days is the maximum number of days you can use in your search criteria. Enter the date using the MMDDYYYY format or click the date field to open the calendar and select a date.

4. Select the **Status**. The default selection is **Any**, but you can select a specific status from the list to search for only **Approved, Denied, Pending, Rejected,** or **Withdrawn** requests.

   Member is an optional field. To limit your search to trip request for a specific member, click the **Look Up** icon to open the Find Member search window. Enter the information to find and select the correct member to use in your search.

Click the **Cancel** button to remove the name from your search criteria. ⊗

5. Click **Search for Trip Requests** to run your search and view the results list.
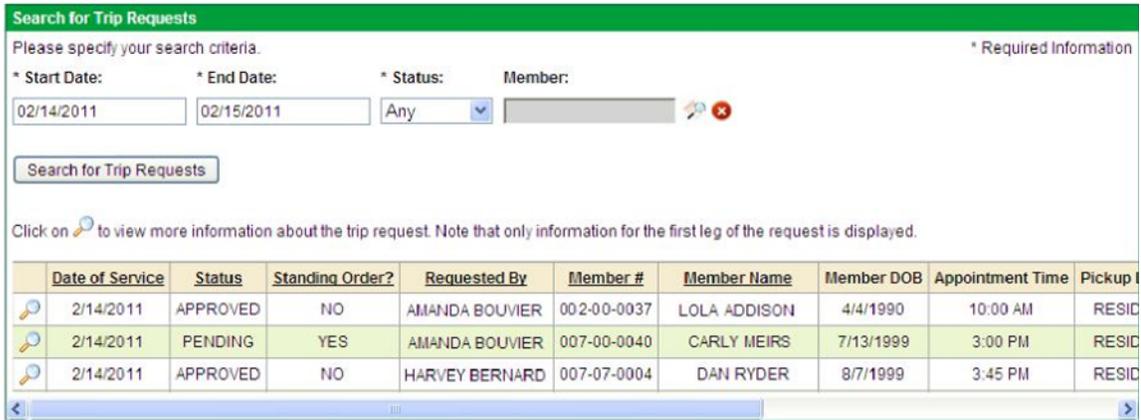
Use the scroll bar at the bottom of the screen to view all columns. The fields shown in results list are:

- Date of Service

- Status

- Standing Order?

- Requested By

- Member #

- Member Name

- Member DOB

- Appointment Time

- Pickup Location

- Dropoff Location

- Level of Service

You can sort the list by clicking on any of the underlined column headers for the first six fields. Click the column header a second time to re-sort the list in the reverse order.

Click the **View** icon to open any request to view the details, or to edit pending or rejected requests.

For an approved request, the Reference Number is shown at the top of the page. Each trip leg shows if it is pending, approved, denied, or rejected, and approved trip legs include the pick-up time.

Status: Approved	Request Number: 249 Reference Number: 6				

Member					
Member ID	**First Name** **Middle Name**	**Last Name**	**Date of Birth**	**Gender**	Insurance Type
004-02-0002	CANDACE	SMITH	6/30/1939	F	Health Care Authority

Reservation
Date of Service
5/9/2011

Requested By				
Name	**Relationship**	**Contact Phone Number**	**Notification E-Mail**	**Fax Number**
Amanda Bouvier	Counselor	101-555-1111	abouvier@facility.com	303-555-1111

Level of Service
Level of Service
Wheelchair

Escorts			
Number of PCAs	Number of Adult Escorts	Number of Child Escorts	**Number of Child Car Seats**
0	0	0	0

Patient Condition			I
Nature of Appointment	**Patient Condition**	Treatment Type	Procedure Corle(s)
test			
Can Member sign the drivers log?			
Yes			

Additional **Information for Oklahoma Health Care Authority**
Medicaid Member Number   **Medicaid Facility Provider Number**
029-18-5280   11
Medicaid Billing Code
123445A

Comments
Additional Comments

rrip Leg A - Approved	
Pick Up Time	AppointmentTime
7:00 AM	8:00 =1.1
	Drop Off Address
Residence	OKLAHOMA HOSPITAL
239 Arrowhead Boulevard	4090 Roy Ct
Oklahoma City, OK 73111	Oklahoma City, OK 73104
Building:	Building:
Apartment	Apartment
Pick Up Phone	**Drop Off Phone**
405-555-0590	999-999-9999
Pick Up Physician	**Drop Off Physician**
Pick Up Directions	**Drop Off Directions**

Trip Leg B - Approved	
Pick Up Time	AppointmentTime
9:00 MI	10:00 AM
Pick Up Address	**Drop Off Address**
OKLAHOMA HOSPITAL	Residence
4090 Roy Ct	239 Arrowhead Boulevard
Oklahoma City, OK 73104	Oklahoma City, OK 73111
Building:	Building:
Apartment	Apartment
Pick Up Phone	**Drop Off Phone**
999-999-9999	405-555-0590
Pick Up Physician	**Drop Off Physician**
Pick Up Directions	**Drop Off Directions**

Modifying Trip and Standing Order Requests

You can change or edit a request for a trip or standing order if the request is in a Pending or Rejected status.

Note: You cannot edit a request that is within 2 business days of the Date of Service. If the date of the trip is within 2 business days of the current date or within the minimum Advance Notice requirements of the contract, contact your Modivcare Facility Representative.

1. Use the **Search for Trip Requests** on the My Requests page to find the pending or rejected reservation you want to modify. You can also open the list of trip requests for a specific date from the Dashboard.

2. Click the **View** icon to open the request.

3. Click **Edit** to open the request.

4. The first page displays the rider information fields.

    You can edit any of the fields except the Member fields and the Date of Service. If you need to change the Member information or the Date of Service, withdraw the existing request and enter a new request with the correct information.

    NOTE: Your changes are not saved until you open the trip leg edit page and save your changes.

5. Click **Continue** to open the trip legs and make any necessary changes.

    The pick up and drop off location fields cannot be edited until you click the **Look Up** icon or select **Enter Manually** to update the fields. Changes that you enter manually are validated in the Modivcare system when you save the changes to the trip leg.

    Note: If you change the drop off location for a trip leg, you will also need to change the pick up location for the next leg.

6. Complete the Signature verification and then click **Save Changes** to submit your changes to Modivcare.

Modifying Rejected Requests

Some requests may contain inaccurate information or be missing information needed to approve the request. In these situations, the Modivcare Facility Specialist will reject the request.

When a trip is rejected, the notes from the Modivcare Facility Specialist explaining why the request was rejected are attached to the request. You can open the request and view the notes in the Important Notes section at the top of the request form.

After reviewing the notes, you can edit and resubmit the request or you can withdraw the request. When you resubmit the request, the status changes to Pending approval by Modivcare.

Withdrawing a Trip or Standing Order

You can withdraw a request for a trip or standing order if the request is in a Pending or Rejected status. Once a request is withdrawn, you can view the request but it cannot be reinstated or modified.

To withdraw a pending request:

1. Use the **Dashboard** list or search on **My Requests** to find the pending or rejected request that you want to withdraw.

2. Click the **View** icon to open the request.

3. Click **Withdraw**.

4. At the prompt asking you to confirm the withdrawal, click **OK**.

5. The system displays a message confirming that the request has been withdrawn.

Canceling a Trip Reservation or Standing Order

At this time, you cannot use the Facility Services Web portal to cancel an approved reservation or an existing standing order. Contact your Facility Representative to cancel an approved reservation or standing order.

Managing Denied Requests

At times, Modivcare must deny services to a member. In some cases, a denial is based on the services Modivcare has been contracted to provide. In other cases, the member may be on restriction. Contact your Facility Representative if you have questions about a denied request.

Managing Your Profile

You can change your password for the Facility Services Web portal as often as necessary. If you think someone has your login information, change your password immediately. You should never share your login information with anyone.

You are required to change your password periodically. You will receive an expiration warning message before your password expires. If you do not change your password during this time, you will be redirected automatically to the Change Password page when you try to log in to the system.

Changing Your Password

To change your password:

1. Select **Manage Password** from the **My Profile** menu.

2. Enter your current password in the **Old Password** field.

3. Enter your new password in the **New Password** and **Confirm Password** fields.

   ꞁ You cannot reuse your current password or any of your 5 previous passwords.

   ꞁ Your password must be at least 8 characters long.

   ꞁ Your password must contain characters from 3 of the following 4 groups:
      o Uppercase letters **A-Z**
      o Lowercase letters **a-z**
      o Numbers **0-9**
      o Special characters **~ ! @ # $ ^ & * ? , . : _**

4. Click **Submit** to save your new password. If your new password is accepted, you will see a notification that your password was changed successfully.

Managing Your Challenge Questions

Challenge questions are a security feature used to validate your identity when you need to reset your password.

To enter or modify the answers to the challenge questions:

1. Select **Manage Challenge Questions** from the **My Profile** menu.

2. Answer the required number of questions. If you answer more, questions will be chosen at random to use as the challenge questions if you forget your password.

3. Click **Submit** to save your changes. You will see a notification that the answers to your challenge questions were updated.

Resetting Your Forgotten Password

If you forget your password, Modivcare can send an email with a link to reset your password. The email is sent to the address listed in your user profile.

If you forget your password:

1. Click **Forgot Your Password?** on the Login page.

2. Enter your **User Name**.

3. Enter the characters you see in the picture in the **Characters** field and then click **Continue.**
The characters are all letters (there are no zeros or ones) and are not case sensitive. The image is used to distinguish a real person trying to validate the account from a computer attempting to defraud the system.

4. Enter the answer to the security question and then click **Submit**.

5. Click **Back to Login** when you receive the message that the email message has been sent.

   Use the link provided in the email to open the **Reset Password** page and enter your new password. The link is valid for 5 days before it expires.

Administrative Tasks

Administrative tasks, such as adding new users and managing user accounts, are available to users who are set up as user administrators or peer managers. Users who do not have administrative permissions do not see the ADMIN option on the main menu and cannot open the User Management page.
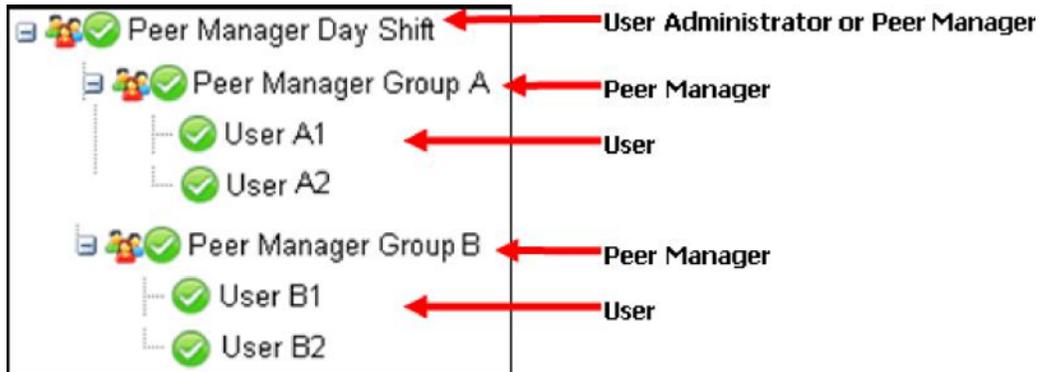
The Facility Services Web uses a hierarchy or "tree" to manage user accounts and administrative access. The user tree is much like the directory tree of files and folders you may use to manage your computer files.

Clicking the plus sign next to the user's name opens the tree and displays the users under that user administrator or peer manager. Clicking the minus sign closes the tree.

The icons identify the types of users and their status.

Icon	Meaning
	User administrator or peer manager
	User is active in the system
	User is not active in the system
	User is locked out of the system

There are three types of FSW users:

ı **User Administrators**
   User administrators have access to the entire user tree, and can add new users, manage user accounts, and move users.

Peer Managers

Peer managers can add and manage users in their own tree, but have limited rights to manage the user accounts of other managers. Peer managers will see two trees:

- their own tree with the users under their supervision
- a separate tree with other peer managers and the users in their trees

Users

Users do not have any administrative rights and do not have access to the User Management page.

Adding New Users

User administrators can add new users to any group. Peer managers can add users only to their own tree.

To add a user:

1. Select a user with administrative rights. You cannot add a user under a user who does not have administrative rights.

    ₁ When you open the User Management page, *you* are the selected user. You do not need to select a user to add users to your tree.

    ₁ If you are a user administrator and want to add a user under a peer manager, select that user.

2. Click **Create New User** to open the User Management Panel.

3. Enter the new user's account information. All fields are required.

Name   The name of the user.

User Name   The login name for this user.

Password   The temporary password for the user. The password
Confirm Password   must meet the requirements for a valid password.

Email Address   The email address that can be used if the user
                                needs to reset their password.

4. Select at least one facility from the list of **Available Facilities** and click the arrow button to move the selected facilities to the list of **Facilities Currently Selected**. Click the **Move All Facilities** box and then click the arrow button to select and move all available facilities.
    The selected facilities you are choosing determines what is displayed when the user opens the **Search by Location Type: Facility** option to select a pick up or drop off location for a trip or preschedule request.

5. Select the **Administrative function** for this user if applicable. By default, new users are not granted administrative rights. Select an option to grant user administrator or peer manager rights to this user.

6. Click **Save User** to add this user or **Cancel** to exit without adding a new user.

Managing User Accounts

User administrators can access any user account in their system. Peer Managers have full rights over the users in their tree, and limited rights to manage the accounts of users under other peer managers.

Action	User Administrator	Peer Manager
• Correct or update the user's name	✓ All users	✓ Users in their tree ✓ Users under another Peer Manager
• Change the user's active/inactive status	✓ All users	✓ Users in their tree ✓ Users under another Peer Manager
• Unlock a user who is locked out of the web portal	✓ All users	✓ Users in their tree ✓ Users under another Peer Manager
• Reset the user's password	✓ All users	✓ Users in their tree ✓ Users under another Peer Manager
• Correct or update a user's email address	✓ All users	✓ Users in their tree ✓ Users under another Peer Manager
• Modify the list of facilities assigned to a user	✓ All users	✓ Users in their tree
• Change a user's administrative permissions	✓ All users	✓ Users in their tree
• Move the user to another group or manager	✓ All users	✓ Users in their tree

To modify or update a user account:

1. Select the user from the tree on the left to open the User Management Panel.

User Management Panel

* Select a user from the tree to modify the user. You cannot modify a peer manager, and you have limited modification rights on your peer manager's team members.

** To create a new user under the currently selected user, click on the **Create New User** button. You cannot create a new user under a peer manager or a peer manager's team members.

*** Move users to different managers by dragging and dropping. You cannot move a peer manager or a peer manager's team members.

Name: Jeff Davis

Active: ☐

Locked Out: ☐

Update password? ○ Yes ⊙ No

Email Address: jrdavis@facility.com

Use the buttons between the list boxes to move facilities (hold down Ctrl key to select more than one)

Available Facilities | >>> <<< | Facilities Currently Selected: MIDWEST CITY REGIONAL H(

☐ Move All Facilities

Administrative function:
⊙ No admin rights
○ Grant admin rights
○ Grant admin with peer manager rights

[Modify User] [Cancel]

2. Edit or update the user account. The following fields can be modified:

Name	The user's real name, not the User Name used to log in.
Active	This box is checked if the user's status is active. Uncheck the box to inactivate the user and disable their login.
Locked Out	This box is checked if the user is locked out of the system because of failed login attempts. Clear the box to unlock the user's account.
Update password?	Click **Yes** to enter a new password for this user. The new password must meet the minimum password requirements.

Email Address   Update the user's email address.

Available Facilities/   Modify the selected facilities for this user. This
    Facilities Currently Selected option is only available to a user
    administrator or the user's peer manager.

Administrative function   Set or change the user's administrative function.
    This option is only available to a user administrator
    or the user's peer manager.

3. Click **Modify User** to save your changes or click **Cancel** to close the page with making any changes.

Managing User Groups

Depending on your administrative rights, you can move users between groups. The user administrator can move users between any trees. Peer managers can move users only in their own tree.

You may want to move a user or group of users if a supervisor or manager is on vacation or leaves the company. You can "drag and drop" the user tree to an active supervisor or manager.

To move a user or group of users:

1. Press and hold the mouse button to select and "grab" the user. If you select a user who has users under them, you will move the entire tree.

2. Drag the user to the new location. This must be under a user who has peer manager or user administration rights.

3. Release the mouse button to drop the user in the new location.

Glossary

ambulatory
A member who is able to walk on their own or with the assistance of a walker or cane and able to be picked up and dropped off at the curb.

address
A physical location defined by a street name and number, city, state, and zip.

advance notice
The amount of time required between requesting a reservation and the date of service of the transportation.

approved
A request that has been authorized by Modivcare as a trip reservation or standing order.

cancellation
Reservation for a trip that is called off by a member, facility staff, or transportation provider.

child escorts (CE)
The number of children receiving unpaid transportation while traveling with the rider to an appointment.

confirmation number
A number generated when Modivcare approves a trip or standing order request.

contact phone number
The phone number of the FSW user requesting the trip.

denied
A request that has been refused by Modivcare based on contract rules or eligibility requirements.

drop-down list
A field that displays a list of pre-defined information for selection.

escort
An additional passenger that will accompany a member to an appointment at the request of the member. The escort remains with the member from the time of pick up through the time of return from his or her appointment.

facility
A named location where a rider is being picked up or dropped off. A location where medical treatment or services are received by a member.

insurance type
An agency such as Medicaid or an insurance group that uses Modivcare to manage its transportation benefits for its eligible members.

level of service (LOS)
The type of ride and service required on a trip. These include requirements such as ambulatory, wheelchair, and stretcher.

medical necessity form
A form completed by a physician that is required for any client who requires are level of service greater than ambulatory, such as wheelchair or stretcher. A physician completes the Medical Necessity Form and determines the Level of Service by which the client will travel.

member
A person for whom Modivcare provides transportation. The terms "client" or "rider" are alternate terms for a member.

on-demand
A one-time trip, not a standing order.

PCA
See personal care attendant

pending
A request for a trip or standing order that has not yet been reviewed by a Modivcare Facility Representative and can be edited in the Modivcare Facility Services Web portal.

personal care attendant
Additional passenger who has no relationship to the member, but has been supplied by the provider to travel with the member.

rejected
A request that is missing information and sent back to the facility for modification or additional information.

request
An application for a trip reservation or standing order submitted online to Modivcare for approval.

reservation
An arrangement for transportation made for an eligible rider. The reservation may be composed of one or more stops, referred to as trip legs. These stops are identified with a letter designator, beginning with the letter "A".

rider
A person for whom Modivcare provides transport on behalf of the customer. The term "member" is an alternate term for a rider.

standing order
Trips arranged in advance for a member who has three or more trips to the same facility each week

status
Stage of a reservation or standing order in the approval process.

stretcher
Indicates that a member cannot sit in a chair or is bedridden and cannot transport in a wheelchair.

transportation provider
Business or company that provides transportation for Modivcare.

trip
Specific transportation job that involves one rider (with possible escorts) but can include multiple legs where each leg is a one-way trip.

trip leg
Portion of a trip defined by a pickup of a rider who is transported to a drop-off location. Each leg is identified with a letter designator, beginning with the letter A.

urgent trip
A trip required by a physician for the same day or next day and is requested outside of the proper notice that is required

wheelchair
Indicates member is confined to a wheelchair and must be transported by a wheelchair van

will call
Indicates the time for a trip leg is not entered and the member has requested to call for a return time on a trip.

withdrawn
A request that has been retracted by the requesting facility.