FAMCare Provider Manual

Updated March 22, 2022

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Overview

FAMCare is the Web-based case management system used between SourcePoint staff and providers who serve clients in the In-Home Care Services program.

You will use this system to accept new client referrals, enter billing, exchange e-mails with Care Consultants and other SourcePoint staff, and learn information about your new clients (e.g. address, phone number, service they are requesting, etc.)

Each agency is allowed two (2) authorized FAMCare users who will have specific login information. **It is very important NOT to share your login information with any other staff members, as this is a HIPAA violation**.

The goal of this manual is to provide your agency with instructions for accessing and using the FAMCare system.

Please do not hesitate to reach out if you run into issues with FAMCare. We look forward to working with you!

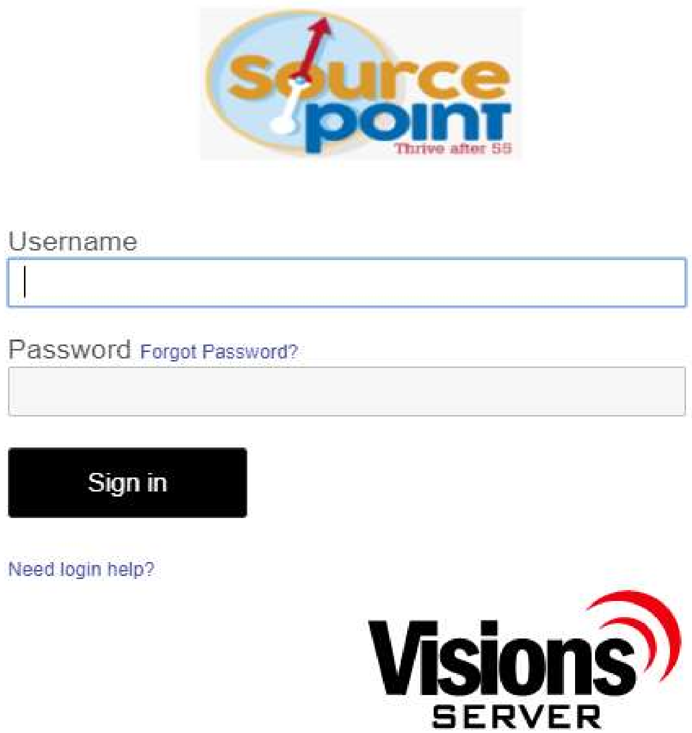
Logging In

FAMCare log in page URL:

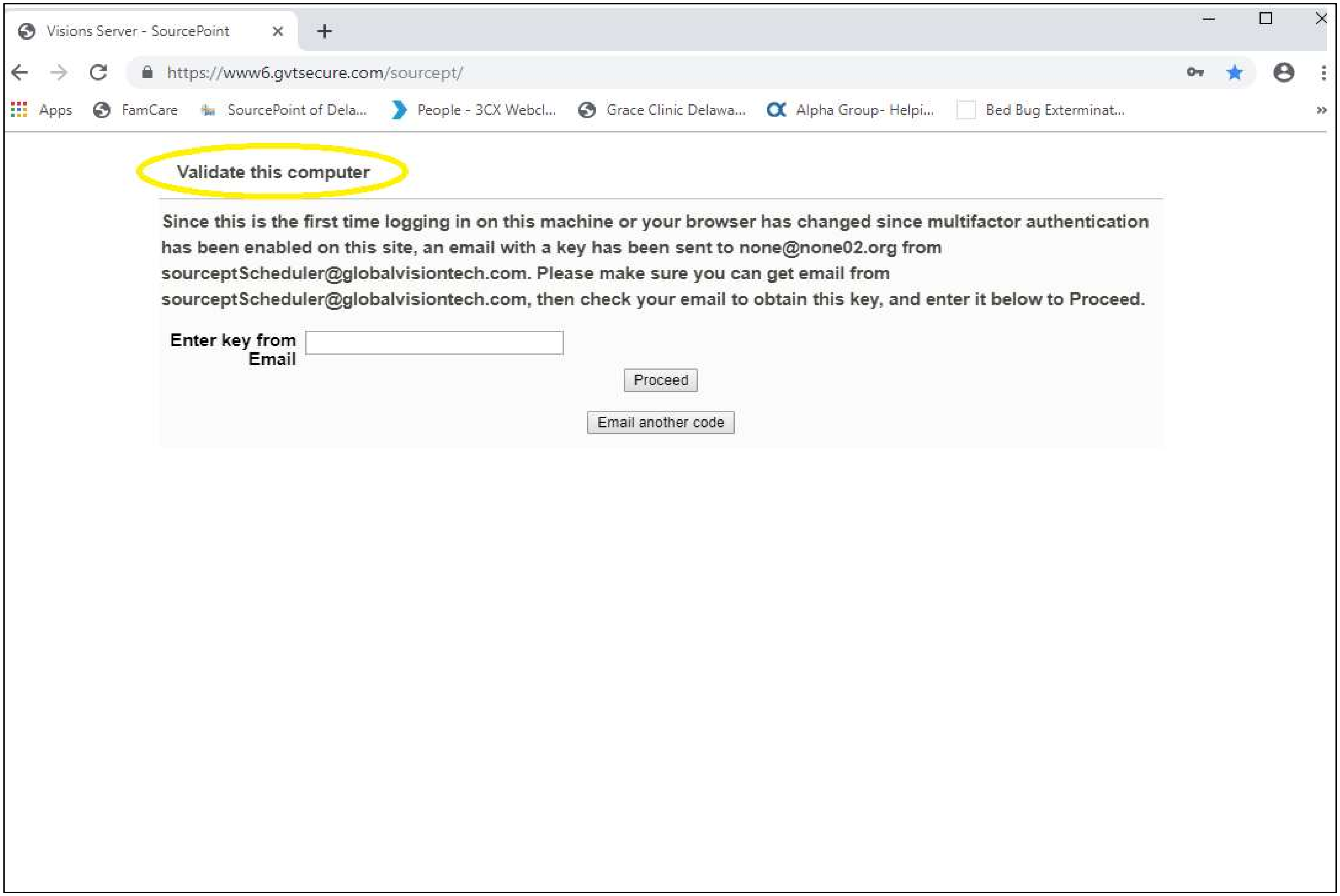
https://www6.gvtsecure.com/sourcept/

- You are able to log in to FAMcare from any device
- Devices will have to be authenticated at the first log in attempt. Going forward, the FAMCare site will be easily accessible. If you have not used a device to log in to the system in a while, you may be prompted to authenticate the device again.
- There may be times when your password will not be accepted. Should this happen, just enter it again.
- Please do not save your username/password in your browser, as this will result in problems when logging in as well as with FAMCare's functionality
- Per Information Technology "best practices," you will be timed out after system activity has been idle for 10 minutes. This is for security purposes. Once the screen locks, a notification will pop up, prompting you to enter your password.

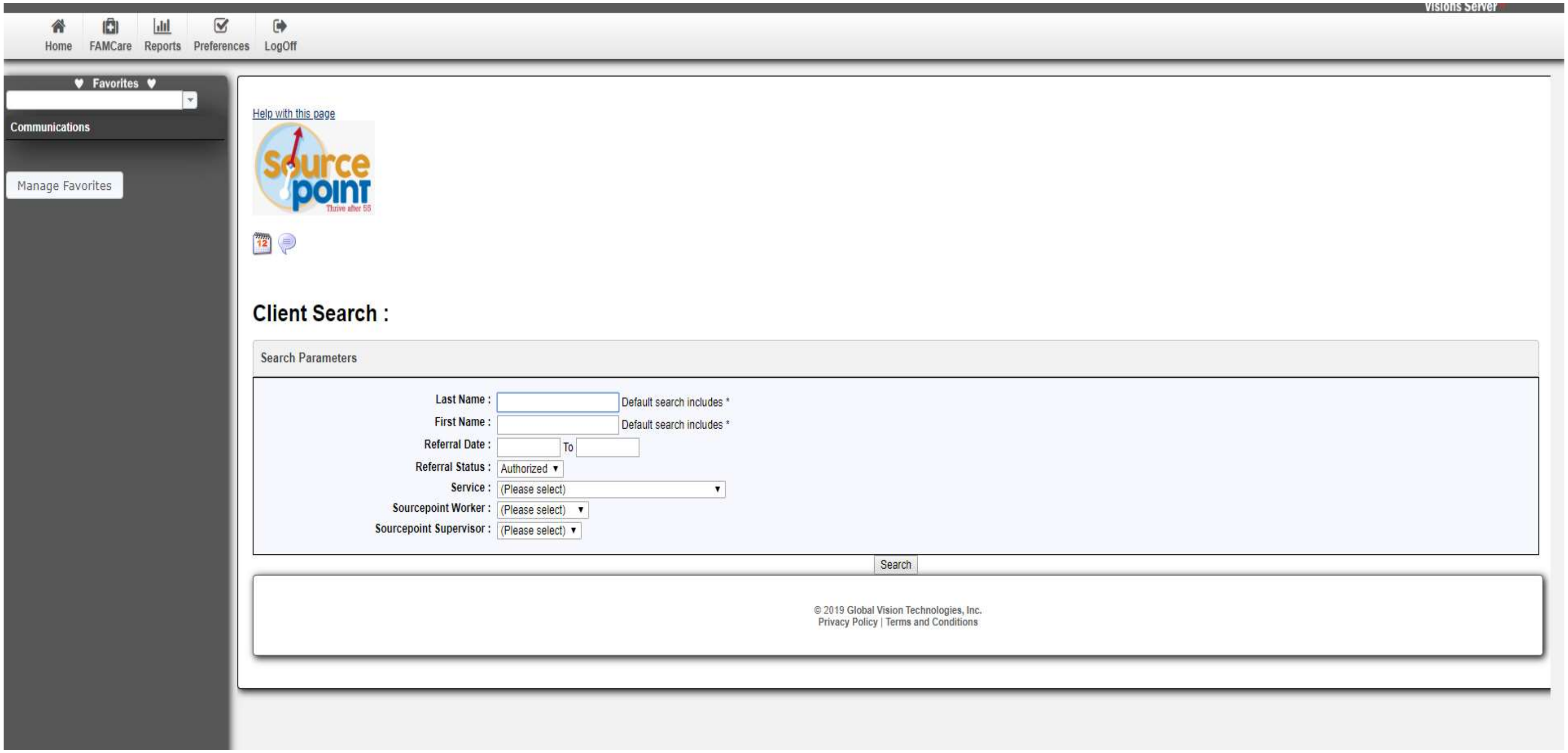
This is the Log In page:



This is what you will see when you first try to log in:



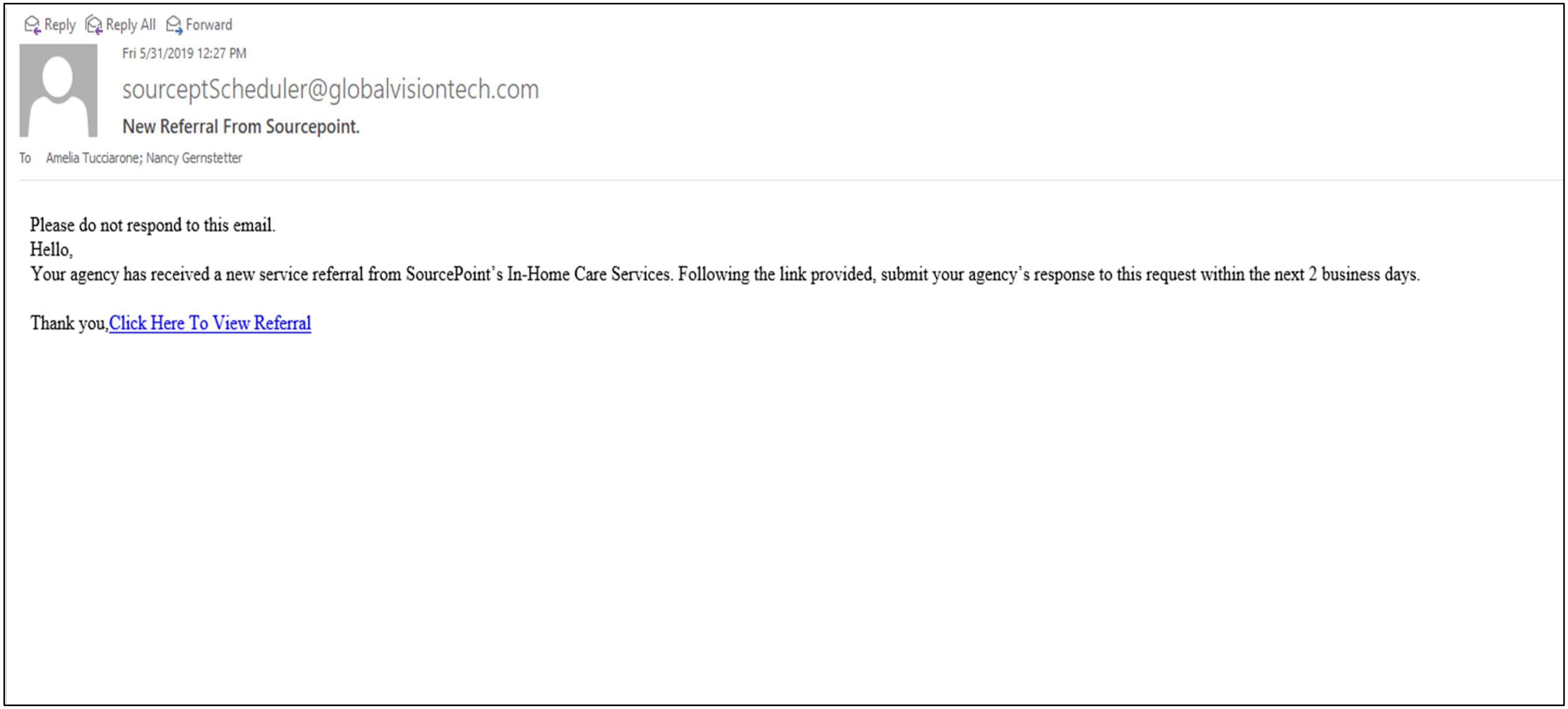
Once you have followed the instructions above and have logged in, your Home Page will look like this:



You will be able to search for a client and obtain your client list on this page. You will be able to see authorized clients and open referrals.

New Referrals

When an enrolled client with SourcePoint requests services, the Care Consultant will make a referral out to providers. You will receive an e-mail that looks like this:


Reply Reply All Forward

Fri 5/31/2019 12:27 PM

sourceptScheduler@globalvisiontech.com

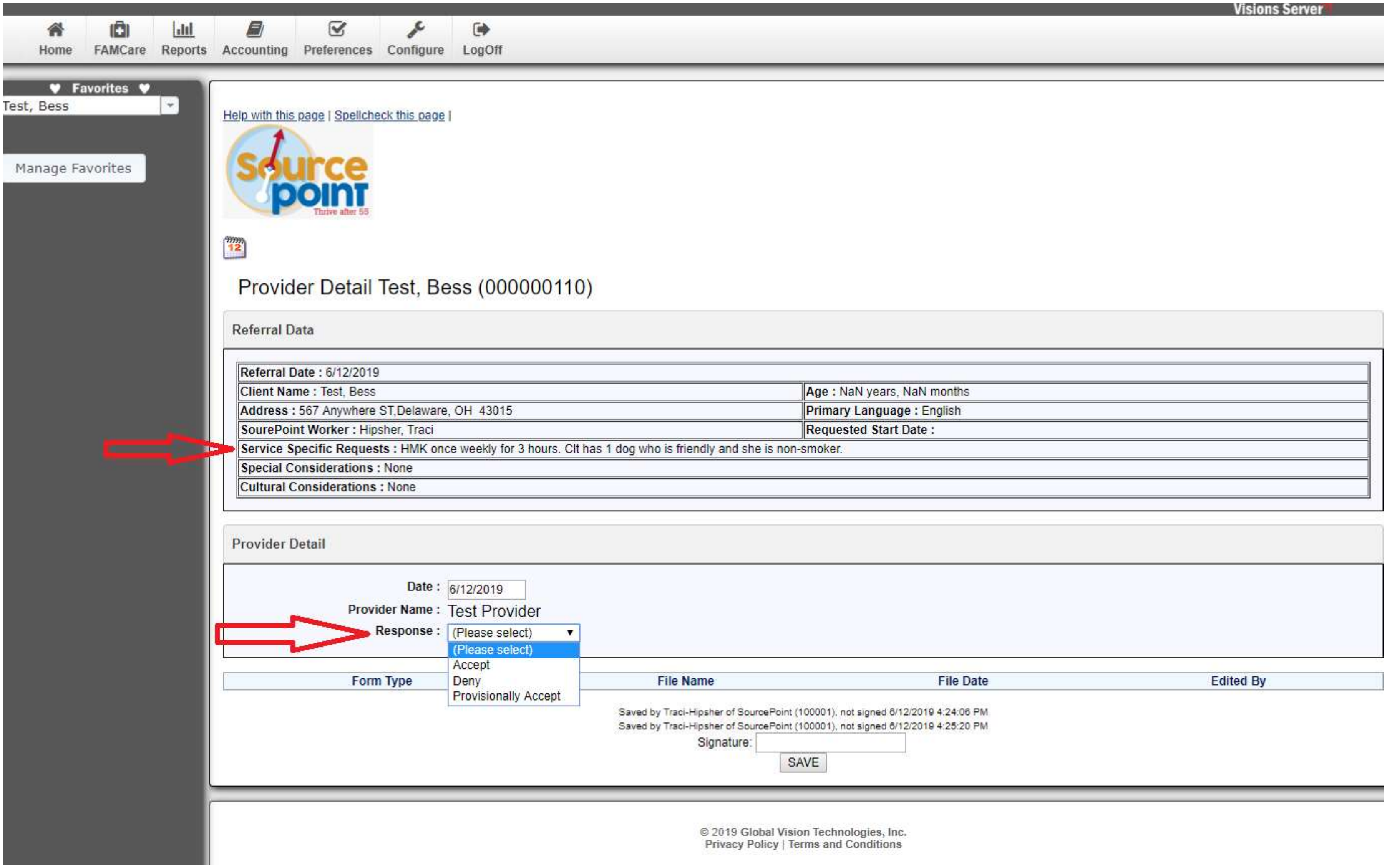
New Referral From Sourcepoint.

To Amelia Tucciarone; Nancy Gernstetter

Please do not respond to this email.
Hello,
Your agency has received a new service referral from SourcePoint's In-Home Care Services. Following the link provided, submit your agency's response to this request within the next 2 business days.

Thank you,Click Here To View Referral

Once you click on the link and log in to FAMCare, this is what you will see:



.

After viewing basic client information, service being requested, service-specific requests, special and/or cultural considerations, determine if your agency will be able to accept the new client.

If you are able to accept the client, simply click on the Response drop-down list and click on "**Accept**." There is a space for Comments, if you would like to convey any additional information to the Care Consultant. Click "SAVE" when you are finished.

Please note: receiving a referral or accepting a client **does not** mean that your agency has been awarded that client.

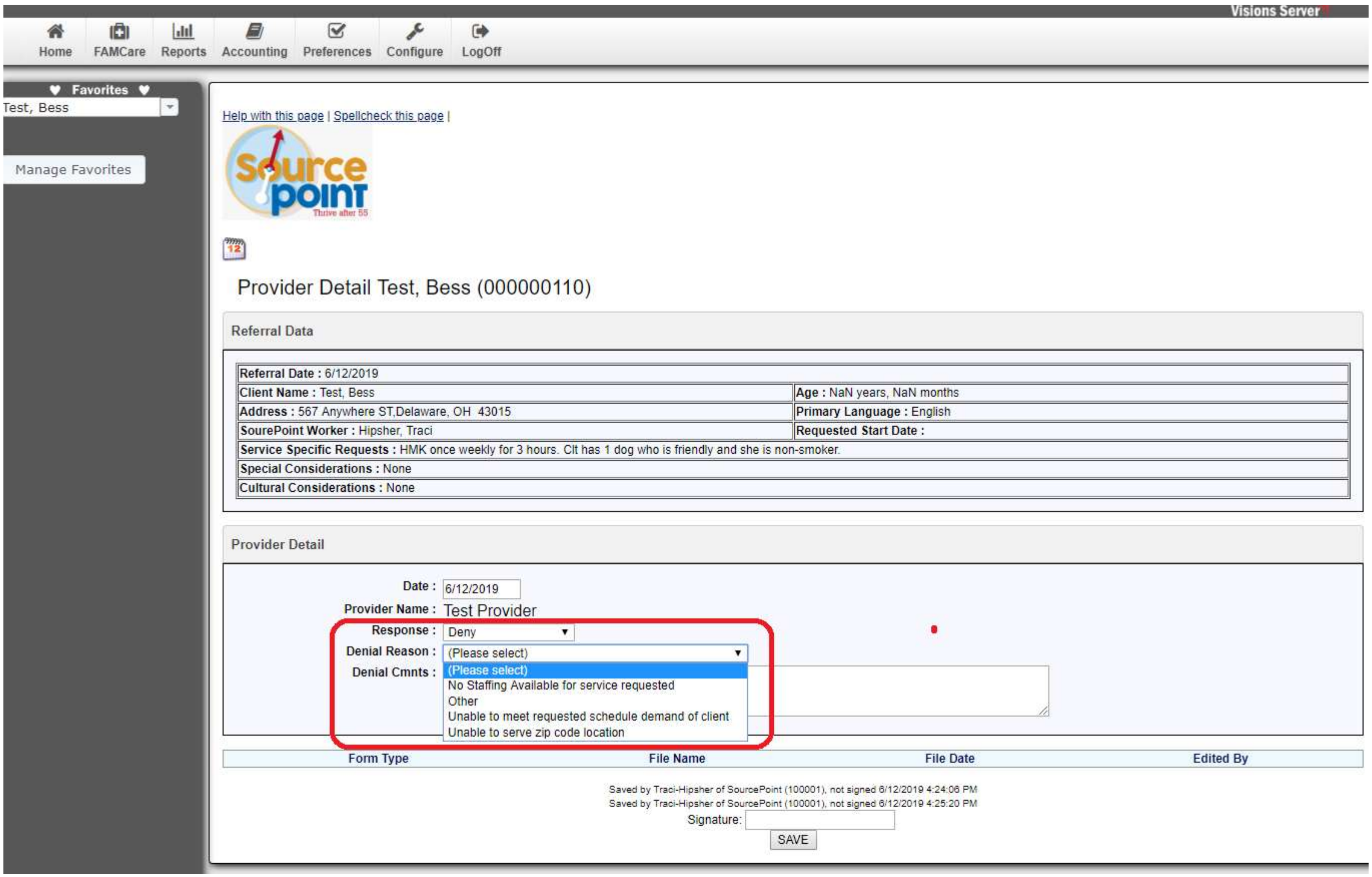
The Care Consultant must **authorize** your agency to work with that client.

Please do not contact that client after you "accept" the referral.

You will receive notification that your agency has been awarded a new client.

If you are unable to accept the referral, you will click on "**Deny**" in the Response drop-down list*. You must select a Denial Reason. Click "SAVE" when you are finished.

*Once a "denial" response is sent, access to that referral is immediately lost. Users are unable to go back to change that response. If circumstances change and your agency is able to serve that client, please contact the assigned care consultant or the provider relations specialist.



Awarded Clients: If your agency is awarded that client, you will receive an e-mail that looks like this:

Please note: since the e-mail does not specify the client's ID, you must click the link in order to see which client the e-mail is concerning.

Reply Reply All Forward

Wed 8/14/2019 9:42 AM

sourceptScheduler@globalvisiontech.com

Awarded Referral Response From SourcePoint.

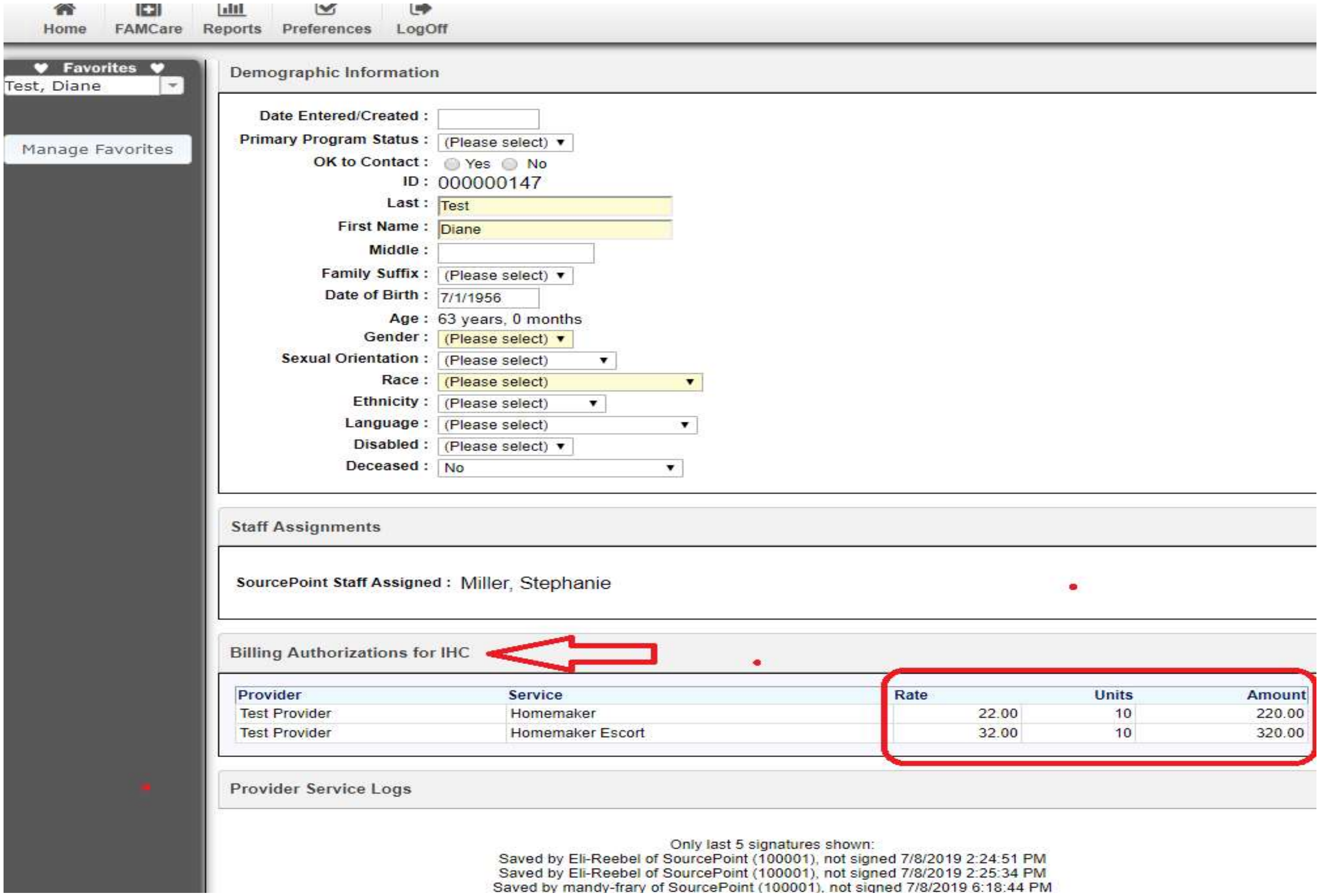
To Test Provider01; Eli Reeber

Please do not respond to this email.
Hello,
Congratulations, a recent referral for new service from SourcePoint's In-Home Care Services has been awarded to your agency. Additional information on the client can be found by following the link provided. Please contact the family to start service within the next five business days and inform the Care Consultant of the planned start date.

Thank you for your partnership

Click Here To View Referral

Once you have notified the Care Consultant of the Start Date for service(s), view services and the number of units your agency has been authorized to provide under “Billing Authorizations for IHC”



Please note: the Rate column lists the standard client rate, NOT the agency-specific contracted rate.

The "Billing Authorizations for IHC" section also includes a place for the Care Consultant "Notes." This area will note important information i.e., service suspensions, product numbers, shipping schedule and service schedule.

It is important to always check this section when viewing a client's Demographic page as there may be new information regarding this client's services:

Billing Authorizations for IHC

Provider	Service	Start Date	End Date	Rate	Units	Amount	Notes
Test Provider	Homemaker	7/18/2019	12/31/2099	22.00	6	132.00	Testing information
Test Provider	Homemaker Escort	8/6/2019	12/31/2099	32.00	8	256.00	
Test Provider	Homemaker Escort	8/7/2019	12/31/2099	32.00	16	512.00	
Test Provider	Homemaker Escort	8/7/2019	12/31/2019	32.00	10	320.00	
Test Provider	Homemaker Escort	8/7/2019	12/31/2099	32.00	6	192.00	
Test Provider	Homemaker Escort	8/7/2019	12/31/2099	32.00	8	256.00	
Test Provider	Homemaker Escort	8/7/2019	12/31/2099	32.00	25	800.00	

<u>Unawarded Clients:</u> If your agency is <u>not awarded</u> the client, you will receive an e-mail like the one below.

Please note: since the e-mail does not specify the client's ID, you must click the link in order to see which client the e-mail is concerning

If your agency is not awarded a client, the agency will still have access to that client for a couple of days after being notified. This access then goes away.

Reply Reply All Forward

Thu 8/1/2019 10:34 AM

sourceptScheduler@globalvisiontech.com

Referral Response From Sourcepoint.

To Amelia Tucciarone; Nancy Gernstetter

Please do not respond to this email.
Hello,
Thank you for your recent acceptance of a new referral from SourcePoint's In-Home Care Services. Unfortunately, the client was not assigned to your agency. Please do not contact this client or family. Additional information can be found using the link provided.

Thank you,<u>Click Here To View Referral</u>

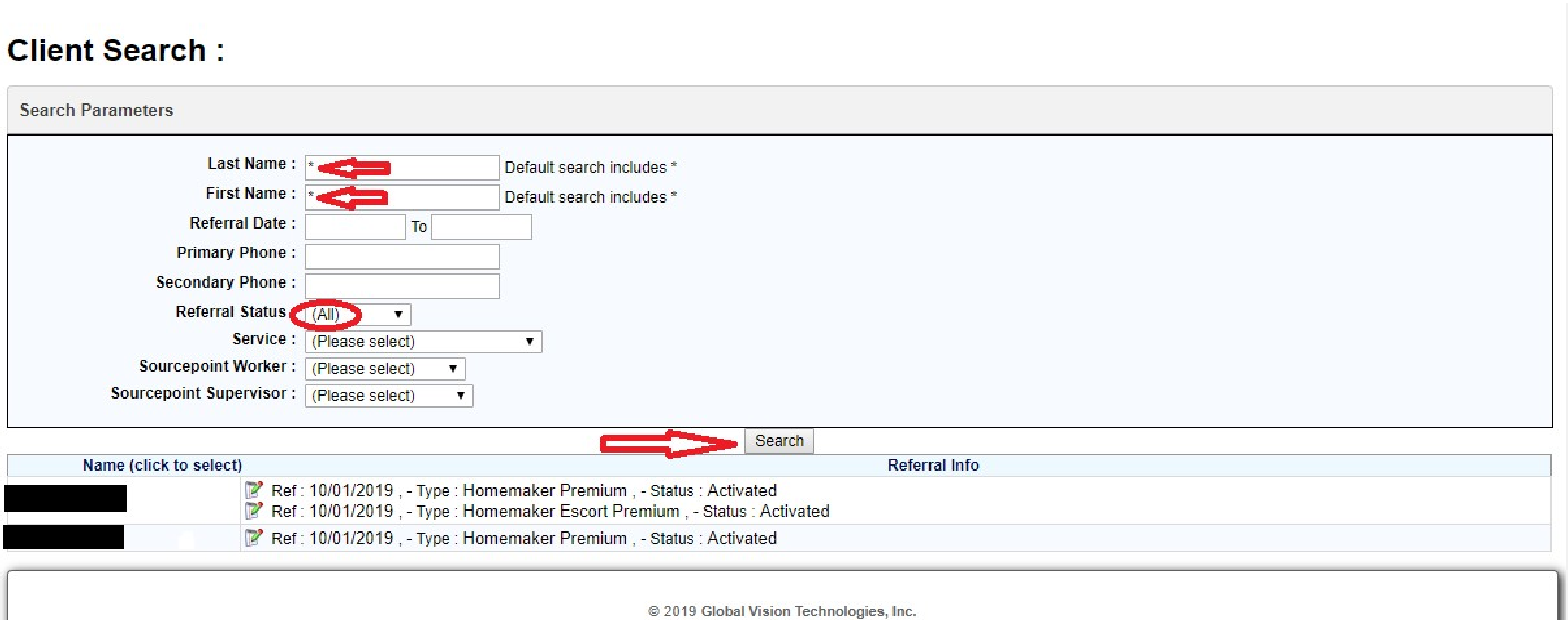
<u>Direct Awards</u>: When an agency and a SourcePoint care consultant communicate one-on-one about awarding a client to that agency, and the usual referral process is not conducted as described above, this is called a "**Direct Award**."

Direct Awards are handled in the system differently and a provider agency will not have access to the client record until the day after the award is made.
<u>To address this, the SourcePoint care consultant must notify the provider relations specialist at SourcePoint to activate a provider's access to the client's record</u>.

If you are unable to access the client record, notify the care consultant to inform the provider relations specialist.

Client List and Information

To view a list of your agency's clients and all open referrals, go to your Home Page (Client Search), enter an asterisk (*) in both of the "Last Name" and "First Name" fields, select "All" in the "Referral Status" drop-down list, and then click "Search." You can access a client's Demographic Information page by clicking on the client name.



Client Search :

Search Parameters

Last Name : * Default search includes *
First Name : * Default search includes *
Referral Date : To
Primary Phone :
Secondary Phone :
Referral Status (All)
Service : (Please select)
Sourcepoint Worker : (Please select)
Sourcepoint Supervisor : (Please select)

Search

Name (click to select)	Referral Info
[redacted]	Ref : 10/01/2019 , - Type : Homemaker Premium , - Status : Activated Ref : 10/01/2019 , - Type : Homemaker Escort Premium , - Status : Activated
[redacted]	Ref : 10/01/2019 , - Type : Homemaker Premium , - Status : Activated

Searching for a specific client: To pull up a specific client, go to the "Client Search Provider" function and change "Referral Status" to: (All), as outlined above, then enter:

1. Last Name and/or
2. First Name and/or
3. SourcePoint's Client Number: *Please remember FAMCare ID numbers are 9 digits long. Be sure to enter leading zeroes before the Client Number*
4. Click "Search."
5. Searching for current referrals: If you wish to only review active referrals, change the "referral status" box to "activated" and include an "* "in either the last or first name box.

Billing

There are 3 ways to enter billing for your clients:

1) Run client list, open each client and bill one-by-one

OR

2) Provider Billing Quick Entry

OR

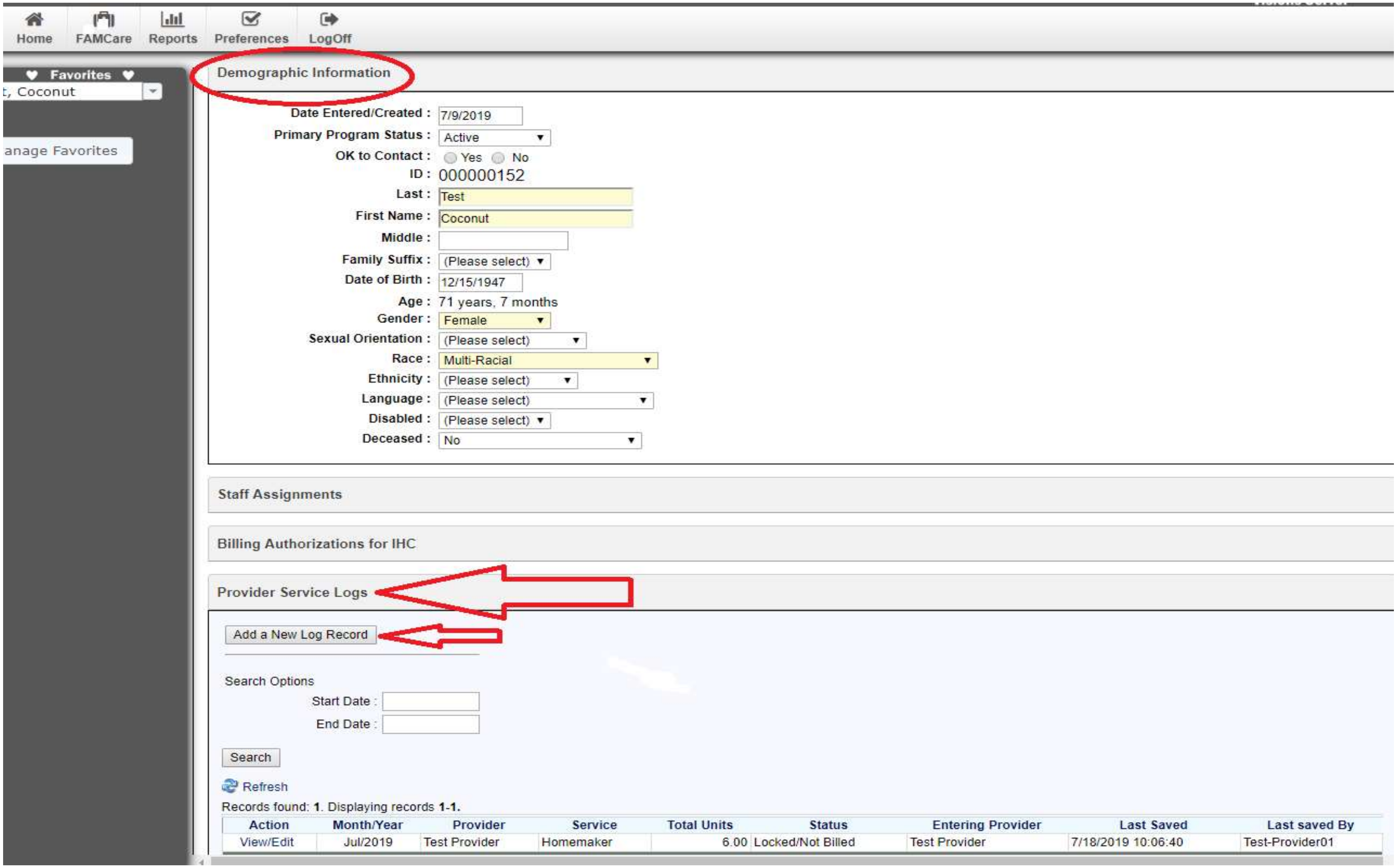
3) Billing Import/Upload from Spreadsheet

1. Billing Per Client:

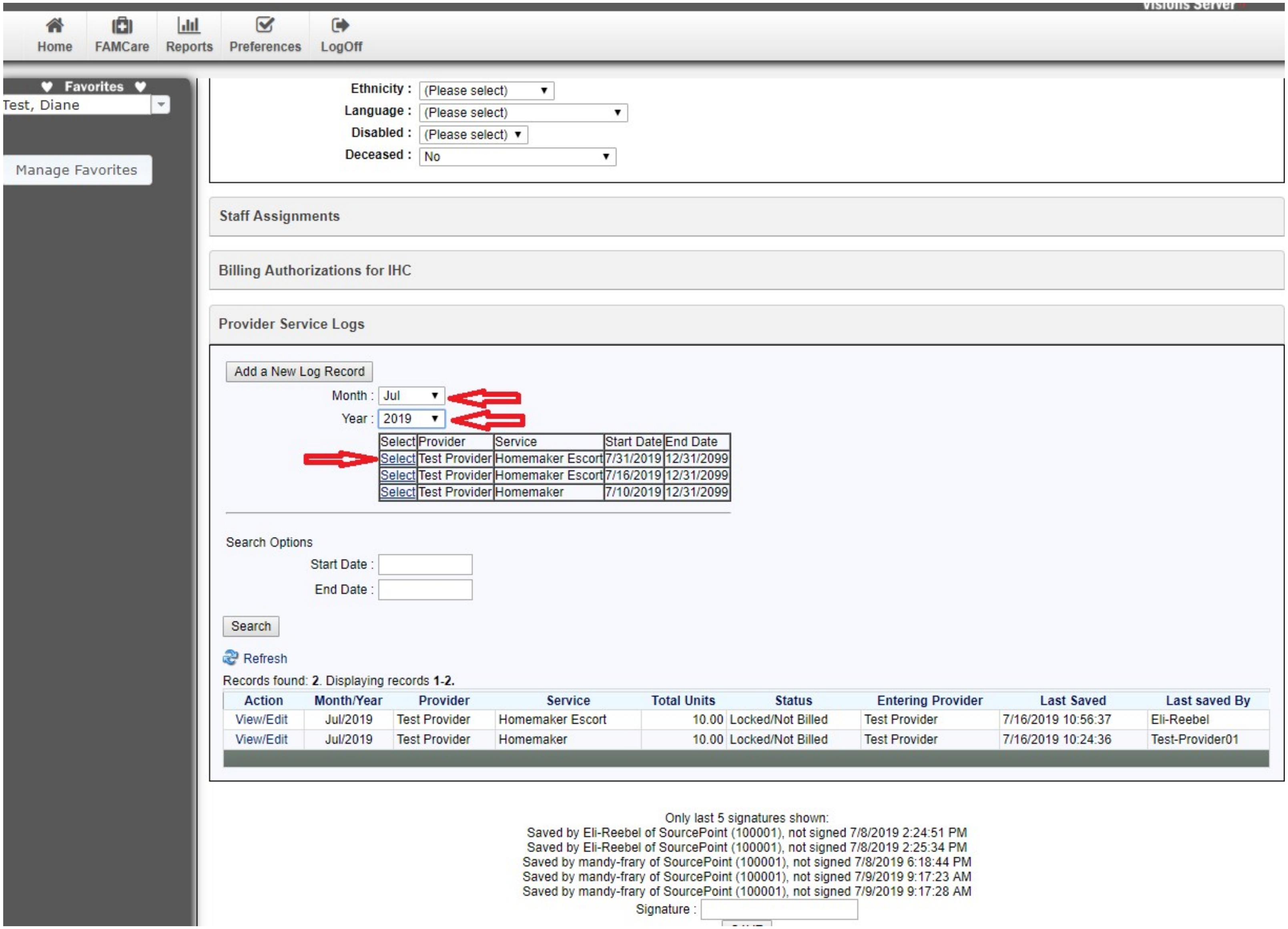
Run Client List, Open Each Client and Bill One-by-One:

You will want to run a client list as instructed above and work off of that list. To save time, you can open a new tab on more than one client at a time and let those client records load. Working from the tabs enables you to keep your client list open and toggle back and forth. Remember to close the client's tab once you have finished their billing.

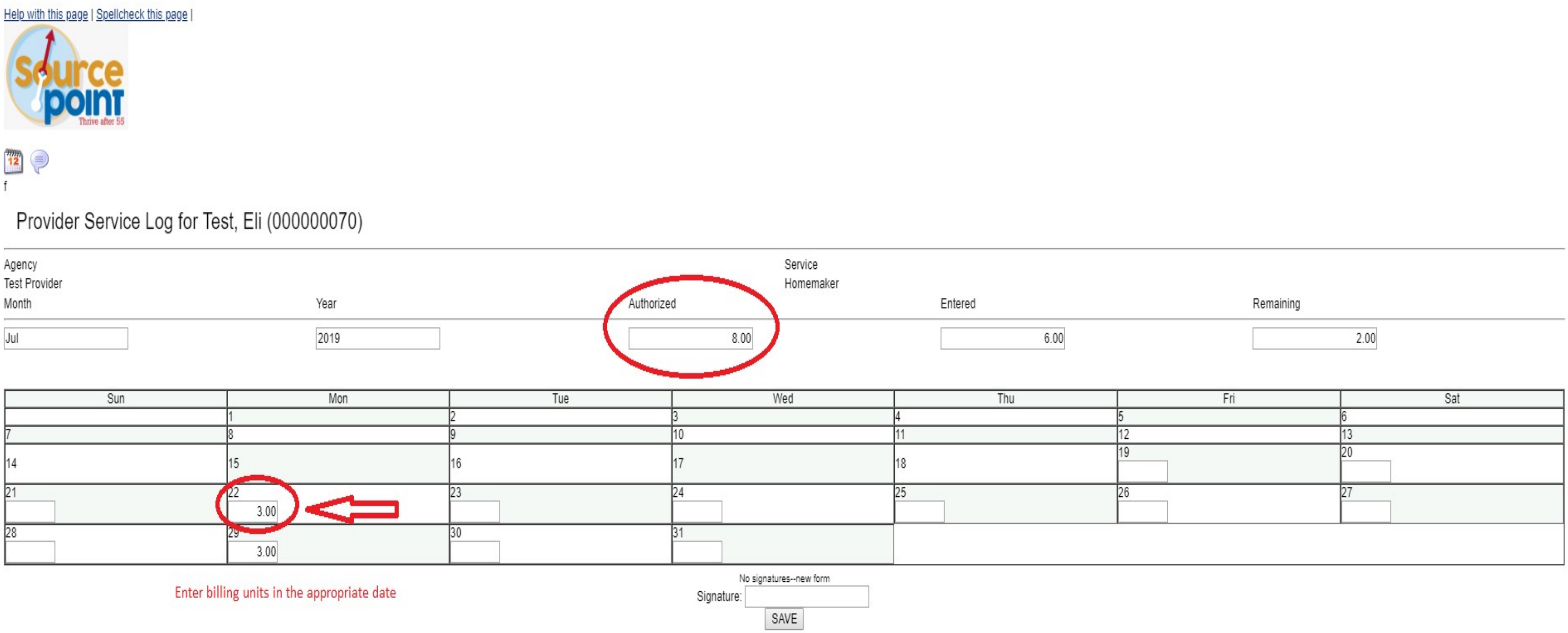
To enter billing, go to the client's Demographic Information page, click on "Provider Service Logs," and then click on "Add a New Log Record":



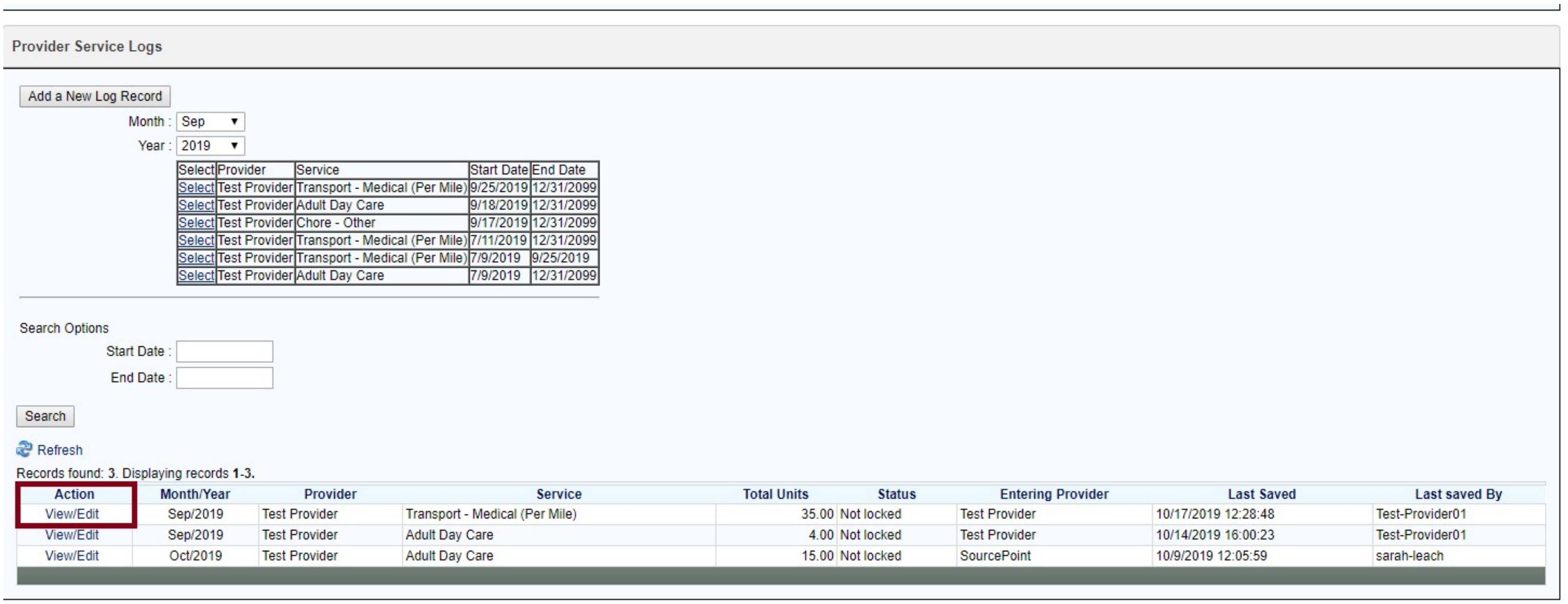
Select the month and year for which you are about to enter billing units. Then, select the appropriate Service/Start Date/End Date line:



The Provider Service Log will pop up; you will want to expand window. Now you are able to enter in billing units. The number of authorized billing units, number of billing units already entered (if any) and number of billing units remaining will all be showing. Enter billing unit(s) into actual date(s) of service. When you are finished, click on “SAVE.”

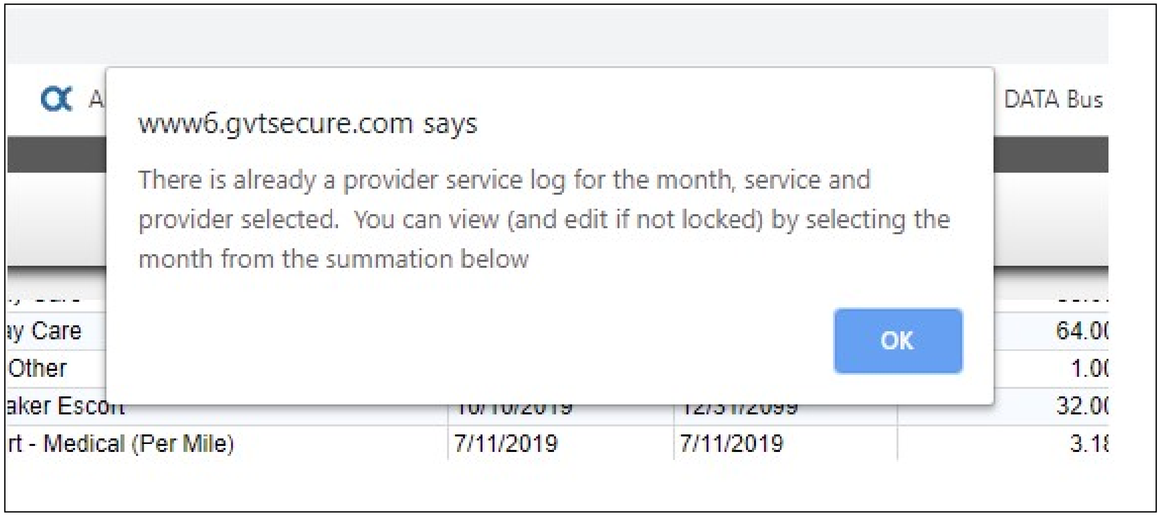


Please note: once you click “SAVE”, any additions/edit to the service log will need to be made from the summation section underneath by selecting “View/Edit”:



Please note: once billing status reads “Locked,” you are unable to enter any additional units. This is because the billing deadline has passed.

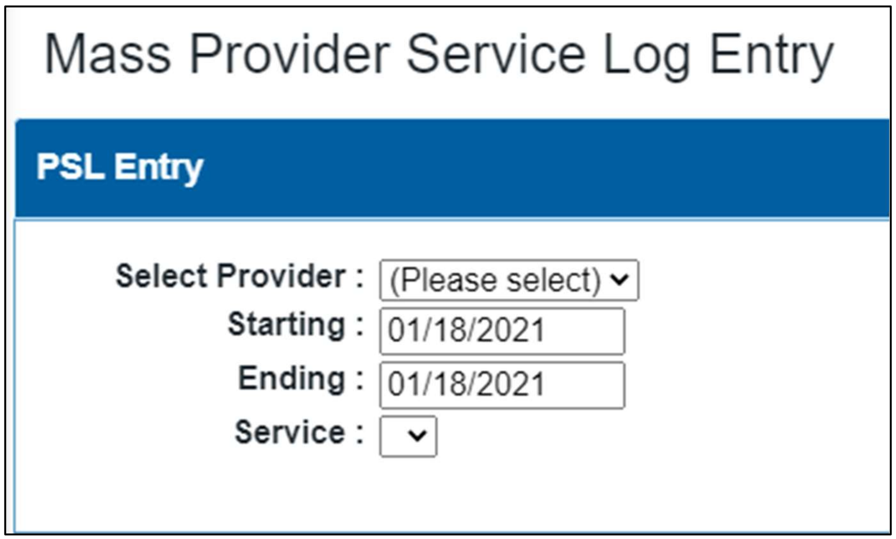
If you try to add units or edit from the "Add a New Service Log" area when a Provider Service Log was already created for that month, this is what you will see:



2. Provider Billing Quick Entry- This is a quicker way of entering billing, especially for providers with a large number of clients.

Click on the 

button, located on the ribbon at the top of your screen. In the drop-down list toward the bottom, you will see **Provider Billing Quick Entry**. Click on that, and the following will show:



Click on "Select Provider"; your agency will be the only option available. Populate that field with your agency's name; then, enter the start and end dates for the period for which you would like to enter billing. You have flexibility in terms of how long a period of time you wish to bill i.e., by the week or month.

Select which service for which you are billing, using the drop-down box.

In the example below, billing will be entered for Nutritional Supplements- Ensure, for the first week of January 2021:

Select Provider : SourcePoint

Starting : 01/01/2021

Ending : 01/08/2021

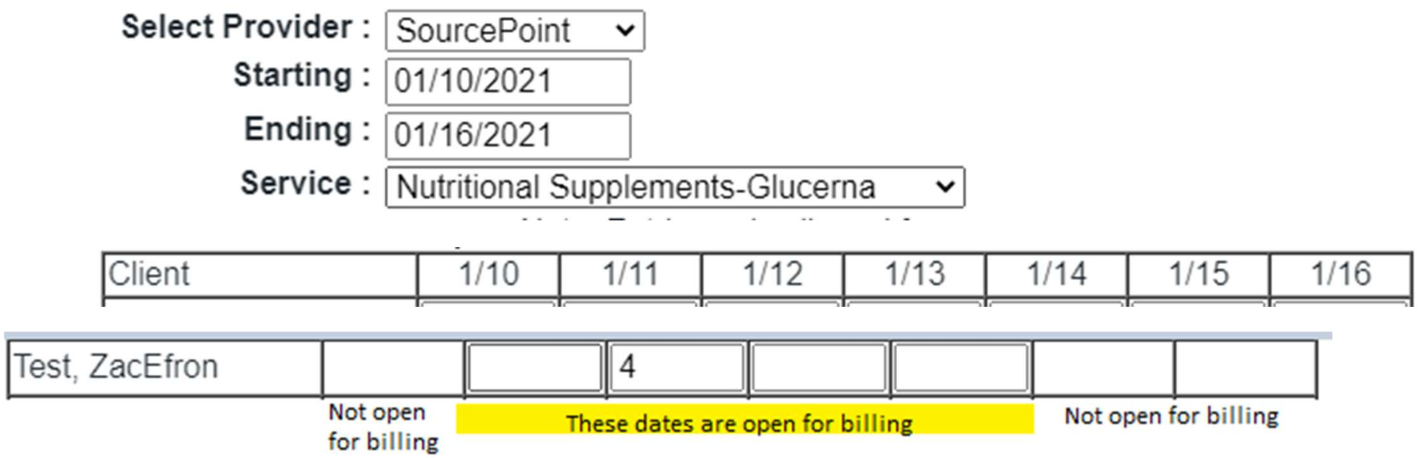
Service : Nutritional Supplements- Ensure

You will then see a list of clients assigned to the service selected, and the dates of the period for which you entered:

Note: Entries only allowed for new PSL's or those that are unlocked/unbilled.

Client	1/1	1/2	1/3	1/4	1/5	1/6	1/7	1/8
Test, Kate								

In the above example, all dates shown are open for billing. However, when a client has start/end dates that fall within the period you entered, you will only be able to enter billing for the authorized dates (as highlighted for instructional purposes):



Enter the number of units in the field corresponding to the client and date of service. Depending on the dates of the period you entered, you should be able to see any billing units entered earlier during that period.

*If the number of units entered are more than the amount for which a client has been authorized, an error message will appear in red. This means you will need to contact the assigned care consultant to request an overage (additional units). In that request, you will need to explain why additional units are needed i.e., there were 5 weeks of service dates in the month being billed. You will need to skip billing for that client for the moment in order to enter the rest of your billing.

Click “Save” at the bottom of the screen once you have finished entering your billing units.

*As in the first billing entry method, a Provider Service Log is created for each of the clients billing was entered. You can check this by going to the client’s Demographic Information page and confirming that the new log is in the Provider Service Logs section. Future quick billing entries for that month will be added to this Provider Service Log.

3. Billing Import/Upload from a Spreadsheet

This method requires the use of a customized Excel template sent to you by SourcePoint staff.

Setting this up on the front end will require time and effort on the part of your agency's IT dept or the Electronic Service Delivery Verification software company. Once this process is completed and going smoothly, this will end up saving time when billing.

Separate instructions on how to upload billing will be sent once the agency has the Excel spreadsheet set up correctly.

Please contact SourcePoint's Provider Relations Specialist for additional information about this billing method.

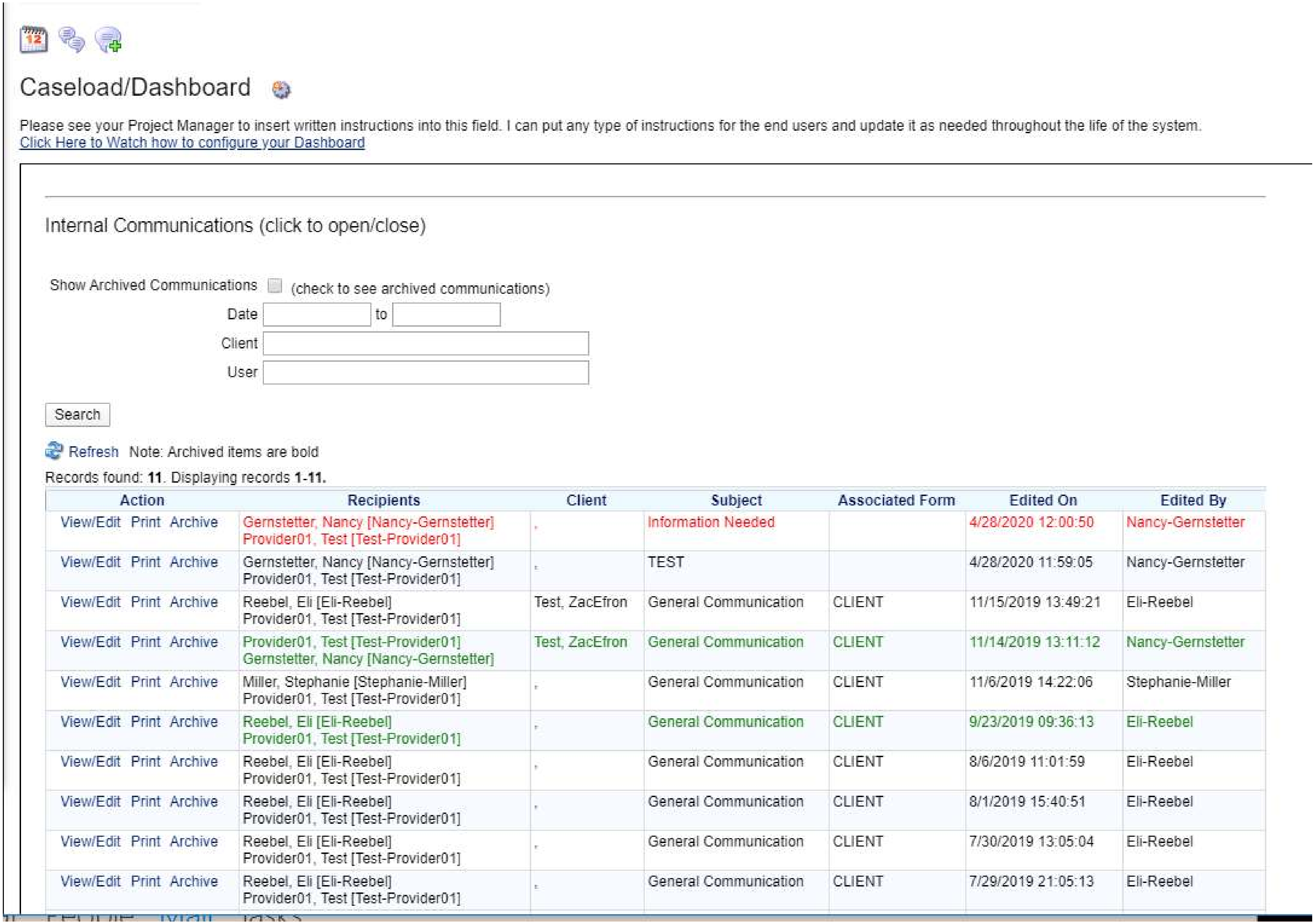
Communication

To maintain HIPAA regulations, any electronic communication containing client information must be sent to SourcePoint staff using FAMCare's Internal Communication system. FAMCare's Internal Communications system can be equated to a regular e-mail program's "inbox" and operates in a similar manner.

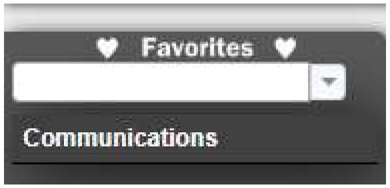
When you receive a communication from SourcePoint, you will receive an e-mail that looks like this:

Click on the "Communications" button on your FAMCare screen and view the new Internal Communication in the log. See instructions on page 31 of this manual.

The Internal Communications log looks like this:



To view your Communications log, you can click on the “Communications” button on the left side of your screen under “Favorites,”



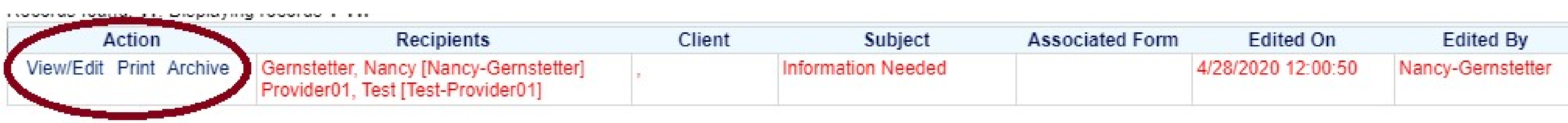
OR

you can click on the icon with 2 speech bubbles to view your Communications log:

Message threads on the Communications log are color-coded:

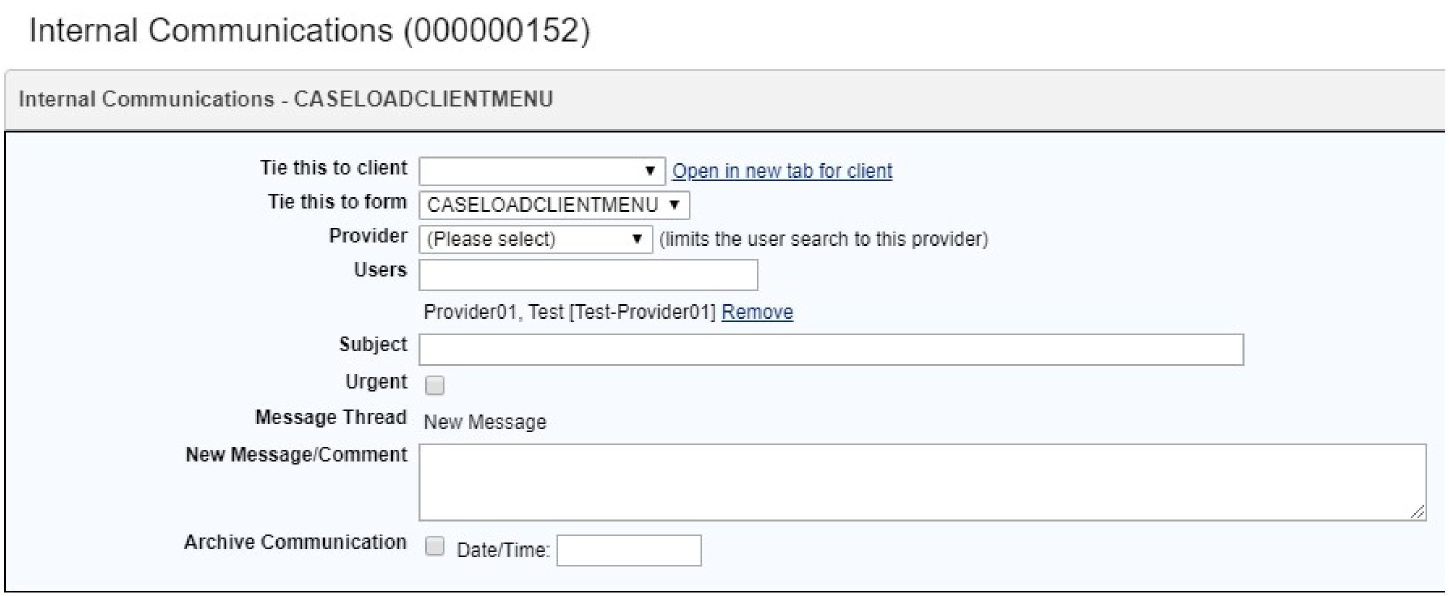
- Messages in **BLACK** are unread
- Messages in **GREEN** have been read
  Messages in **RED** are Urgent

To <u>reply</u> to a communication, click on “View/Edit” at the far left side of the message to which you would like to respond:



Action	Recipients	Client	Subject	Associated Form	Edited On	Edited By
View/Edit Print Archive	Gernstetter, Nancy [Nancy-Gernstetter] Provider01, Test [Test-Provider01]	,	Information Needed		4/28/2020 12:00:50	Nancy-Gernstetter

To <u>initiate</u> a new message thread, click on the speech bubble with the green + sign:



How to navigate this screen:

- **"Tie this to client"**:

  You have the option to "tie" your message to a specific client, or not tie your message to a specific client
  If you are sending a message **not** about any one particular client, select "Do not tie this to a client" from the drop-down list

- **"Tie this to form"**:

  Select "Do not tie this to a form" from the drop-down list

- **"Provider"**:

  This can be left on the (Please select) default, or to see a listing of all SourcePoint staff Users, select 'SourcePoint (100001)

  If you are only sending a message internally within your own agency, select your agency name from the drop-down list

- **"Users"**:

  Select the recipient(s) from the drop-down box or begin typing the recipient's name
  Do not remove your name from the Users list of names as this will alter the communications log.

- **“Subject”**:

  Type in the subject line for your message

- **“Urgent”**:

  If your message is time-sensitive such as an overage request or anything else that requires immediate attention, check off this box. This will make your message appear in RED to both the recipient and you in the “Communications” log.

- **“Message Thread”**:

  If you are replying to a message, the message thread will appear here.

  If you are starting a new message thread, nothing will show in this area.

- **“New Message/Comment”**:

  Type your message here

Do not check off Archive Communication box, nor enter the Date/Time or Signature

- **“Attached Files Section”**:

  Upload any file(s) that you would like to send to the recipient

- **“Close and Copy”** feature:

  FAMCare offers a feature called “Close and Copy”

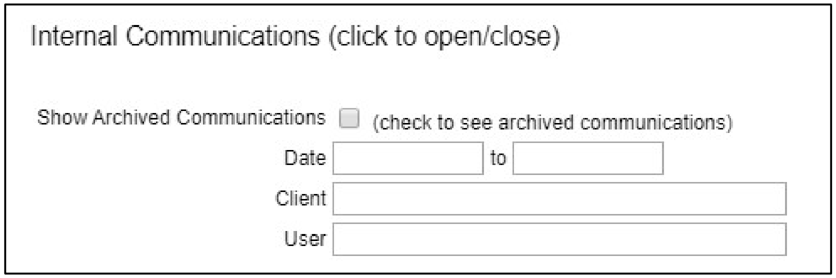
  This acts as the “forward” option offered in regular e-mail systems, to send the message thread on to a user, and not include some or all of the current users on the thread.

  Note: the original thread can be viewed in archived communications. See below for more information on archived communications.

- Click “SAVE” at the bottom of the page when you are finished; this will send your message

How to search your FAMCare Inbox: The Communications log page has **search** options for showing your archived communications, and to search message threads by date, client and/or user:



1. **Searching by date:** Enter a date range into the two boxes and hit "Search." This will populate all messages received within the time frame.
2. **Searching for a client:** If you are searching for messages tied to a specific client, you can enter all or part of the client's first and/or last name into the search field. Users can also enter all or part of the client's FAMCare client ID number.
3. **Searching by Sender:** Users can also search their FAMCare inbox by the user they were communicating with; enter all or part of the user's name in the User field and hit "Search".

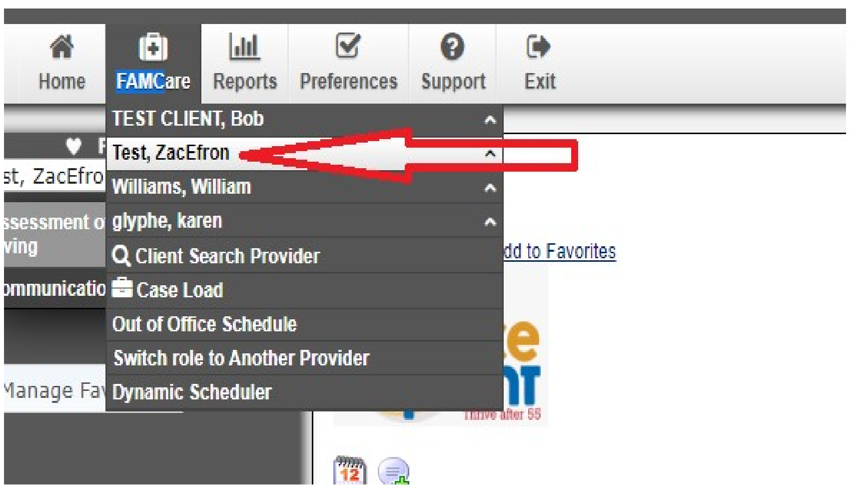
Archived Communications: Instead of Deleting messages/threads, the FAMCare Internal Communications system allows users to Archive messages/threads. Archiving a message/thread will remove it from the main "Communications" log page but not remove it from the system.

To view Archived messages/threads, check off the "Show Archived Communications" box as seen above. To send a message from an Archived thread, View/Edit the thread, write your message, and hit "SAVE." FAMCare will un-archive the message once new activity has occurred.

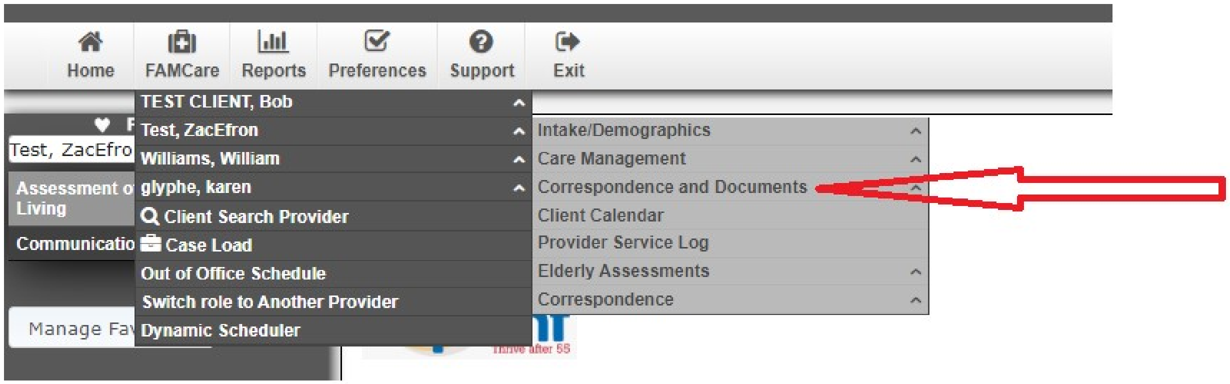
Uploading Documents

To upload documents to a client's record such as an Provider Incident Reports, Supervisory Reports, or other items, pull up the appropriate client using the "Client Search" function and go to that client's Demographics page.

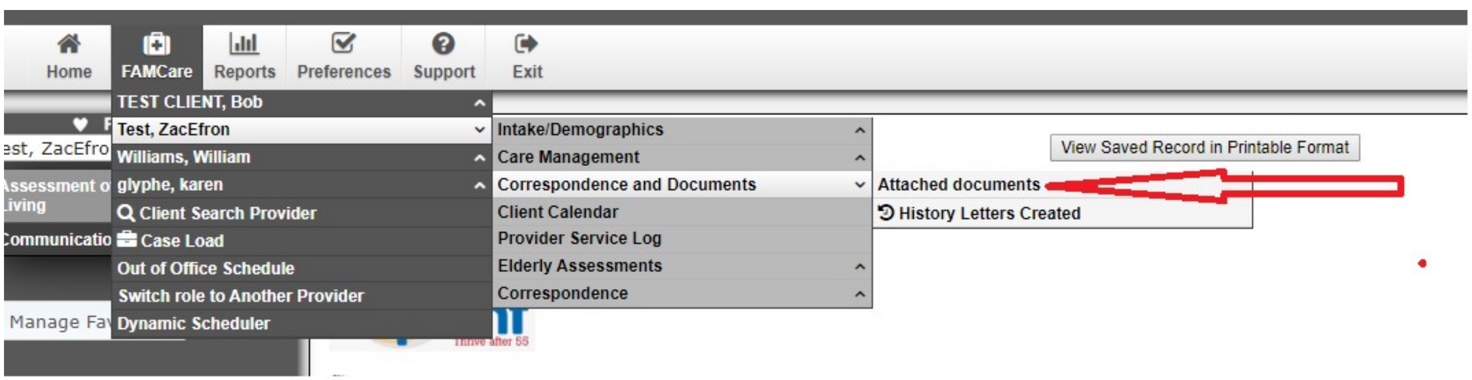
Then, click on the FAMCare icon up in the ribbon and go to the client for whom you would like to upload the document:



Next, click on the client name and a drop-down list of items will appear. Click on "Correspondence and Documents":

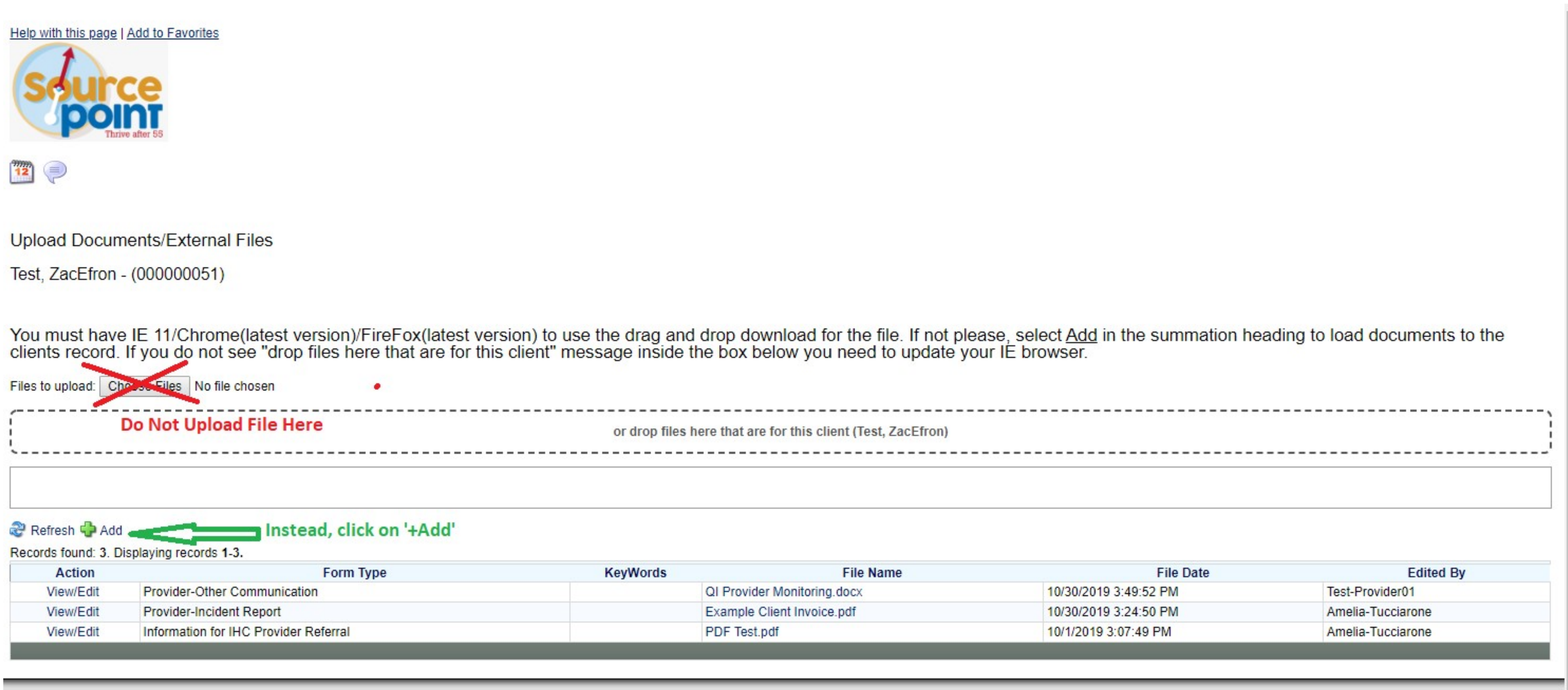


After clicking on "Correspondence and Documents," another drop-down list of items will appear. Click on "Attached documents":



You will then see the screen below. Do not use the “Choose Files” box on this screen to upload your document.

Instead, click on **“+Add”** as noted below:


Help with this page | Add to Favorites

Source point Thrive after 55

Upload Documents/External Files

Test, ZacEfron - (000000051)

You must have IE 11/Chrome(latest version)/FireFox(latest version) to use the drag and drop download for the file. If not please, select Add in the summation heading to load documents to the clients record. If you do not see "drop files here that are for this client" message inside the box below you need to update your IE browser.

Files to upload: ~~Choose Files~~ No file chosen

Do Not Upload File Here

or drop files here that are for this client (Test, ZacEfron)

Refresh Add Instead, click on '+Add'

Records found: 3. Displaying records 1-3.

Action	Form Type	KeyWords	File Name	File Date	Edited By
View/Edit	Provider-Other Communication		QI Provider Monitoring.docx	10/30/2019 3:49:52 PM	Test-Provider01
View/Edit	Provider-Incident Report		Example Client Invoice.pdf	10/30/2019 3:24:50 PM	Amelia-Tucciarone
View/Edit	Information for IHC Provider Referral		PDF Test.pdf	10/1/2019 3:07:49 PM	Amelia-Tucciarone

The following screen below will pop up. Click on “Choose File” to upload your document.

Choose the “Document Type” in the first field. Leave the “Document Effective Date,” “End Date” and “Replacement Document” fields blank.

Help with this page

Upload Document/External File : Test, ZacEfron (000000051)

Document Details

Document Type : Provider-Incident Report

Date Form Received or Completed : 10-30-2019 16:14:58

Document Effective Date :

End Date :

Replacement Document :

Uploaded File : Choose File No file chosen

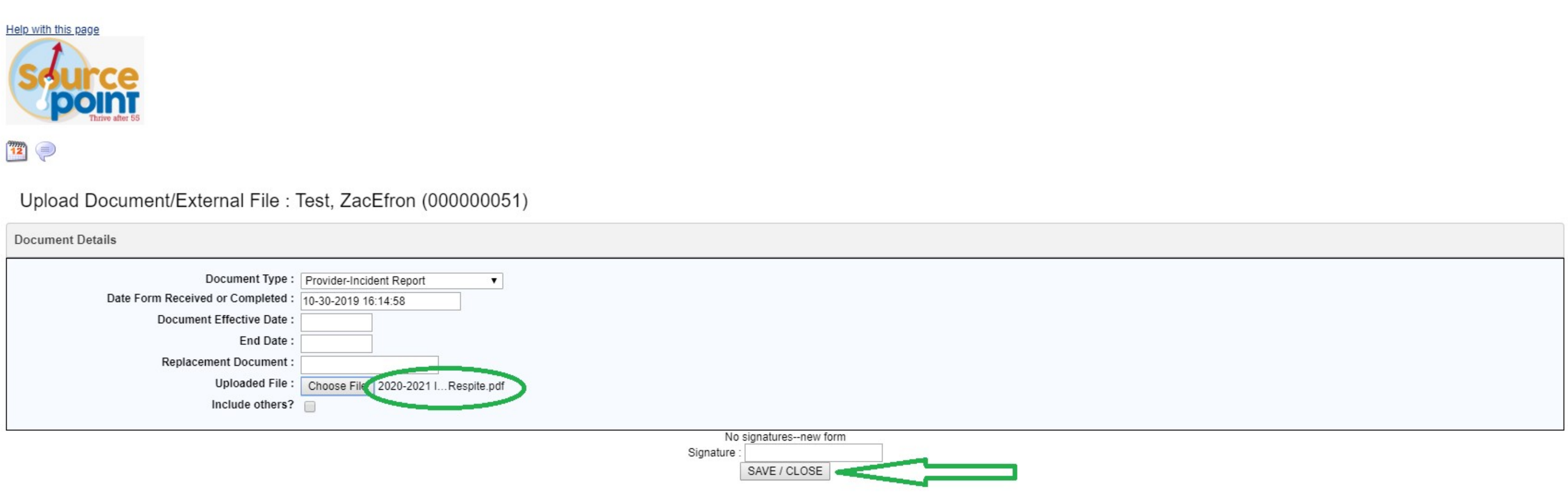
Include others?

No signatures--new form

Signature :

SAVE / CLOSE

Once you see the document/file name next to the "Choose File" box, your document has been successfully uploaded. Click on SAVE/CLOSE.



IMPORTANT NOTE: SourcePoint staff will NOT be automatically notified that you have uploaded a document for this client.

You must send a separate Internal Communication informing the Care Consultant (or other SourcePoint staff) that you have uploaded a document.

Reports

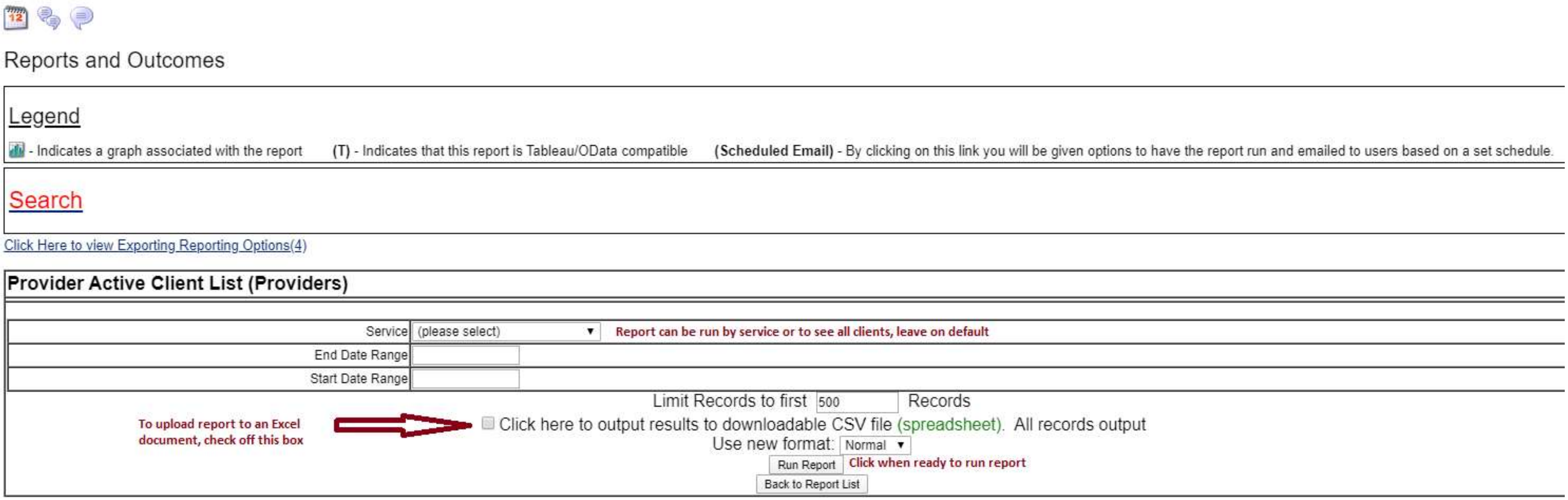
To view a report, click on "Reports" in the ribbon at the top of the page:

Then click on "Report List":

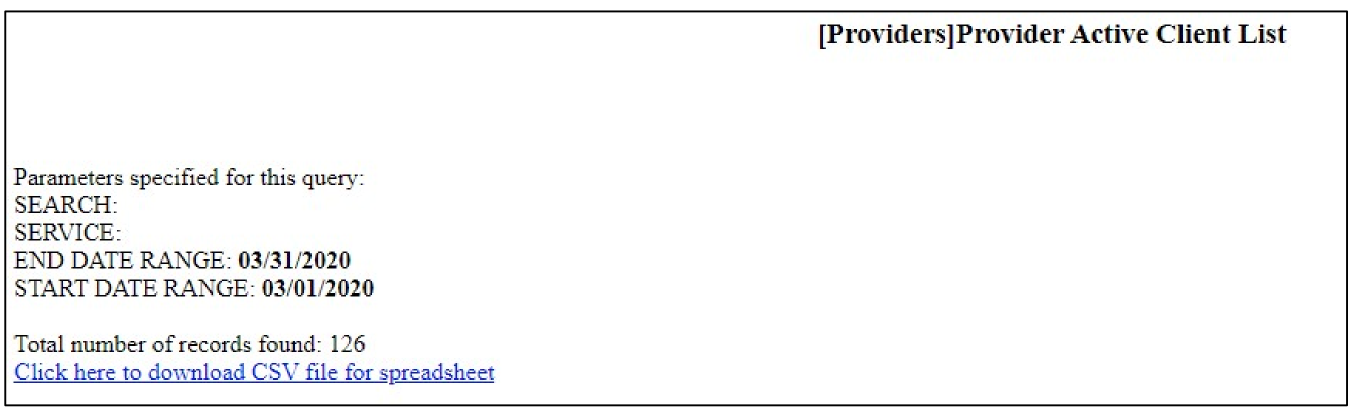
The following screen will pop up:

To view your agency’s active client list, click on “Providers,” then “Provider Active Client List”:

The following screen will pop up:



Please note: To download the report to a CSV file (you can later save the CSV file as an Excel document), click on "Click here to download CSV file for spreadsheet"in blue:

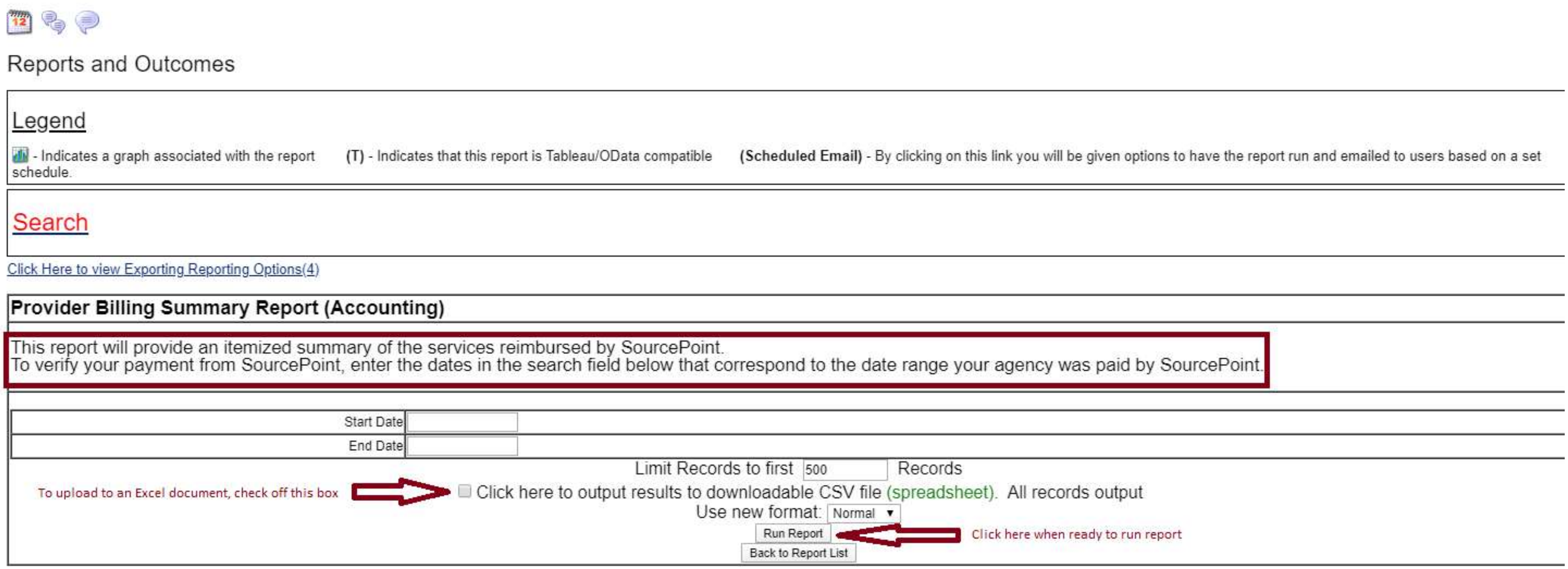


To run a “Provider Billing Summary Report” (Remittance Report), click on “Accounting” on the “Report List” screen shown earlier in this section of the manual. Then click on “Provider Billing Summary Report”:

Accounting

Provider Billing Summary Report

The following screen will pop up:



Reports and Outcomes

Legend

- Indicates a graph associated with the report (T) - Indicates that this report is Tableau/OData compatible **(Scheduled Email)** - By clicking on this link you will be given options to have the report run and emailed to users based on a set schedule.

Search

Click Here to view Exporting Reporting Options(4)

Provider Billing Summary Report (Accounting)

This report will provide an itemized summary of the services reimbursed by SourcePoint.
To verify your payment from SourcePoint, enter the dates in the search field below that correspond to the date range your agency was paid by SourcePoint.

Start Date

End Date

Limit Records to first 500 Records

To upload to an Excel document, check off this box

Click here to output results to downloadable CSV file (spreadsheet). All records output

Use new format: Normal

Run Report

Click here when ready to run report

Back to Report List

[Accounting] Provider Billing Summary Report

Parameters specified for this query:
SEARCH:
START DATE: **03/01/2020**
END DATE: **03/31/2020**

Total number of records found: 409
Click here to download CSV file for spreadsheet

FAQs

1. Where can I search for a Client's Demographic Information page?

- Please reference page 18 of this manual for instructions how to search for a client.
- To view the Client Demographic Information page, either click on the client name, or "Open a New Tab."

2. I don't see a client recently assigned to me by SourcePoint. What should I do?

1. Make sure "All" is marked in "Referral Status" field in the Client Search Page search page
2. Limit search criteria entered in case of misspelling
3. Was it a Direct Award? If yes, contact provider relations specialist
4. If still unable to view client, contact provider relations specialist

3. My Internal Communications inbox is really full, I don't want to delete old messages, but need to clean up some space, what should I do?

- Instead of deleting a message thread, FAMCare has the "Archive" function. Please reference page 37 in this manual for further instructions.

4. I am having a hard time finding a specific message within my Internal Communications inbox. Is there a way to search?

- Message threads can be searched by client, date(s), and user (recipient). Please reference page 37 in this manual for further instructions.

5. I only want to review current referrals, is there a way to do this?

- To search only for current open referrals, enter an asterisk * in the Last Name field, change “Referral Status” to “Activated,” and click “Search.”

6. I accepted a referral a few days ago but now I don’t see it on my referral list. What happened?

- It is likely your agency was not awarded the client. Referrals NOT awarded to your agency will disappear from your list a couple of days after the client was awarded to another agency.
- If you need to keep track of all accepted referrals, it would be best to keep your own log/record separate from FAMCare. Please reference the “New Referrals” section starting on page 8 of this manual for more instruction on managing referrals within FAMCare.