



# A Deep Dive into the Case Manager Module

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WHITE PAPER

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## About Case Manager

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Vertex System's Case Manager is a cloud-based electronic case management software solution designed specifically for IDD agencies serving the developmentally disabled population in agency day service, employment and residential settings. The software enables information collection from referral to discharge, which can subsequently be analyzed and used to determine client progress on their objectives and billing.

One of its key features is its ability to help organizations maintain compliance by triggering reminders to submit missing or incomplete documentation to the system. In turn, this offers a stress-free user experience, allowing for enhanced organization and client progress tracking.

Case Manager's capabilities include the ability to enter service time and progress records throughout the day, as well as delivering supports. Information can be reviewed and finalized at the agency, service location, or DSP level. Additionally, it allows a view of clients by agency-defined groupings with secure database storage for documents to prevent unauthorized access.

Case Manager can generate demographic reports, apart from monthly, quarterly, or annual progress reports- enabling agencies to stay ahead of all requirements and accurately report to funding sources. The software helps IDD agencies navigate and streamline the complicated case-management process while providing a holistic view of client progress.





# Case Manager & Billing Manager Software

Vertex System's Case Manager and Billing Manager software modules work together seamlessly to provide essential tools for documentation compliance, demographics, and billing. DSPs can easily enter daily service documentation that can be billed on paper or electronically, significantly streamlining the billing process.

With Billing Manager, users can see live status updates on all billing, denials, resubmissions, replacement claims, and write-offs. This means that staff time can be saved on tasks such as managing authorizations, calculating the proper number of units and dollars to bill, preparing invoices, applying payments, and rebilling.

The system is also very accurate, minimizing the possibility of errors. Billing Manager notifies the user if a client receives services they are not authorized to receive. The user can then enter the authorization or change the service code to another service. Using EDI 837 claims and 835 payments, payments and cash receipts can be automatically applied.

## Renewal Management with Billing Manager

Billing manager monitors authorization renewals. Users can set a specified number of days to receive notifications for renewal authorizations. On the other hand, generating an invoice is a simple process as users can select funding sources, date ranges, and specific services to be billed for, with the entire process taking mere minutes. The submission of electronic 837 files is a breeze with just one additional click.





## Authorization Utilization Reports with Billing Manager

The Billing Manager software module includes several Authorization Utilization Reports that offer a comprehensive view of budget versus actual units and dollar amounts. This enables users to identify outstanding billing receivables easily. Furthermore, the A/R analysis tool allows users to customize parameters and perform rebills and voids for their IDD agency.

## Adding A New User to Case Manager

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When adding a new client to Case Manager, the person is automatically visible in Vertex System's Service Billing Manager, Client Payroll Manager, and Vocational Time Manager/Touch. Case Managerserves as the starting point for users and clients, and accounts in the Client Payroll Manager are automatically activated upon creation. WithCase Manager, when bundled with other Vertex modules, users can easily manage their payroll, billing, and scheduling needs.

To add a new user to Vertex System's Case Manager, administrator permissions are required. It's important to configure Case Manager Security Roles to ensure proper user hierarchy and access levels. This lets you control who can see and access specific areas within the solution. Organizations can limit user access and establish more efficient workflows by using these security roles.





## Here are the steps to adding a new user within Case Manager

### 1. Add the Person to Case Manager

- a. Select **Admin > Intuition > Organization > Persons** from the menu.
- b. From there, choose **+New** and enter the demographic information of the new user, and check off the boxes next to **Staff, User, Provider**, and **Active**.
- c. Once complete, click **Save & Close** to create the user account.

### 2. Configure the User in Case Manager

- a. Select **Admin > Intuition > Security > User** from the menu.
- b. Navigate to **Search** on the button bar, and enter the user's name you created, and click the edit pencil. The record will display the demographic information you entered previously.
- c. From there, you'll scroll down to the bottom of the page to the **Security Role** field, where you'll select the new user's appropriate role.
- d. Below this field is the **User Name** that connects the **Case Manager** module to your **Active Directory**. You must enter the user name with the name of your domain followed by a backslash. Otherwise, you will not be able to save the record.
- e. Finally, click **Save & Close**.

### 3. Assigning Services to Provider

- a. Select **Admin > Intuition > Staff > Providers** from the menu.
- b. Then, click **Search** and type part of the user's name in **Display Name**.
- c. From there, navigate to the pencil icon to the left of the provider, add the service provider by clicking the **+** sign, and use the dropdown arrow to select the first service the provider works with.
- d. From there, click **Save & Close**.

### 4. Assigning Provider to Hierarchy Mode

- a. Select **Admin > Intuition > Staff > Providers** within the menu.
- b. The **Provider Gives Consumer Visibility To** field should be used to display the group reviewing or approving provider documentation records.
- c. Then, navigate from the **Staff Profile** to the **Staff Gets Consumer Visibility** field and select the appropriate group for this staff member.

### 5. Assign Caseload

- a. Select **Consumers** in the menu, and click the pencil to the left of the first consumer in your caseload.
- b. From there, click **Life Plan**, navigate to the **Support Network** and click the **+** sign.
- c. Using the **Person** dropdown menu, you can select the provider and role of the person working with the consumer and complete any additional information as required.



# How Hierarchy Works in Case Manager

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Vertex System's Case Manager module incorporates an advanced hierarchy system that provides a streamlined approach to document review. The hierarchy levels can extend up to 4 levels deep and consist of nodes representing different levels of the organization. While each of the bottom three levels of the hierarchy can have multiple nodes, users should note that the hierarchy only works from a vertical perspective and not a horizontal perspective.

Each node in Case Manager is designated a "parent" node that determines the documentation the user can review. Providers and staff can be set up within the nodes, with providers able to "give" visibility to a node for documentation review. In contrast, staff can "get" visibility from a node for the same purpose. The users are generally set up within the same node, and once a provider gives visibility to a node, any other staff who "gets" from that department can also view the documentation.

This hierarchical system in Case Manager simplifies document review processes and helps IDD organizations facilitate seamless communication and efficient decision-making.





# Understanding Documentation & Billing Statuses

The Case Manager software module from Vertex System offers two separate status filters, Documentation Status, and Billing Status, to facilitate efficient management of documentation and billing processes.

The Documentation Status filter covers all record and status types, including:

- **Service Records**
- **Progress Notes**
- **Case Notes & Supports**
- **Not signed**
- **Posted**
- **Rejected**
- **Revised**
- **Signed**

With the Billing Status filter, users can quickly view and manage the billing progress of each document. The filter options include Batched, Invoiced, Matched, Not Billable, Not Yet in Billing, and Resolved, and each status holds a different meaning, enabling more accurate and streamlined billing procedures. This feature saves time and reduces errors for users by quickly identifying potential issues, such as documents that are not yet billable or require further action.





# Connecting Employee TimeWorksPlus Records to Case Manager

## About TimeWorksPlus

TimeWorksPlus, a cloud-based time and attendance software solution, is essential to Vertex System's Time Management and Case Manager solutions. With TimeWorksPlus, IDD agency teams can efficiently manage schedules in real-time while seamlessly tracking and recording staff time, attendance, service delivery, and accrual balance.

The software's user-friendly interface enables organizations to streamline and automate time-off requests, monitor early clock-ins, and issue warnings for overtime. Additionally, TimeWorksPlus significantly reduces time spent scheduling tasks using advanced geofencing, geocoding & IP address identification technology.

TimeWorksPlus features capabilities such as a biometric reader, facial recognition technology, thermal reader, break tracking, schedule enforcement, and secure kiosk mode, making it one of the most comprehensive and secure time management tools. It also integrates seamlessly with payroll processes and tracks billable time, further simplifying administrative tasks for IDD organizations.

## The Steps to Connecting Employee Records from TimeWorksPlus to Case Manager

1. From the dropdown menu, select **Users**.
2. Click the green **+New**.
3. Insert the customer name under **Site**.
4. Find the employee and select their name under **Staff**.
5. Enter the employee code from TimeWorksPlus in the client user field.
6. Navigate to **Active On** and enter the date of hire for the new employee.
7. In the **Employee Code**, enter the employee code again.
8. At the top, click **Save & Close** to finalize.





# Adding Locations & Programs in Case Manager

Adding locations and programs in Case Manager is a seamless process that allows for efficient management of service delivery. Please note that service locations and programs serve different purposes, with the former being the physical setting where services are rendered and the latter being the activities clients attend throughout the day.

## How to Add Locations in Case Manager

1. Navigate to **Scheduling** then **Locations** from the menu.
2. To create a new location, select **New** in the upper left corner. The page will contain fields to enter the location name and address details.
3. Scroll down the page to find options such as the location type, and if the location requires Electronic Visit Verification (EVV).
4. Enter an **Active Date** in accordance with when the location began offering services.
5. Click **Save & Close**.



## How to Add Programs in Case Manager

1. Navigate to the **Scheduling** menu and select **Programs > +New**.
2. Each program will require a name.
3. Ensure that the default enrollment status is set as **Active** and **Completed** for the **Default Un-enrollment** status.
4. Click **Save & Close**.



# Creating Service Sessions & Navigating EVV

Case Manager in Vertex Systems allows for effortless creation and navigation of service sessions and EVV documentation. Billable time spent with clients can be accurately accounted for with a few clicks. Activities entered in EVV provide documentation of services rendered during client interaction, while users can ensure optimal efficiency and accuracy in client service management.

## How to Create Services in Case Manager

1. Under **Quick Tasks** within Case Manager, select either the **Working with a Group** or **One-on-One** options.
2. Select the consumers that are included in the service session.
3. From there, choose the location where the service is rendered.
4. Users can view a list of individual activities performed during the service.

## How to Navigate EVV in Case Manager

1. Indicate if a service you are performing is an EVV service by selecting **EVV required**.
2. Select **Service Notes Required**.
3. To the right, view the **Activity Information**. Then, navigate to the **+** sign to add a new activity and enter its name.
4. Check the billable checkbox and enter an **Active** date.





# Signing & Approving Records in Case Manager

In the Case Manager module, signing and approving is defined by a two-level review process. The provider signs off on records using the Provider Review feature; then the supervisor approves them. Records are always editable until signed, and the supervisor can monitor progress on the Sign/Approve pages to ensure timely completion. This streamlined process saves time and ensures accurate documentation and compliance.

## Signing Records in Case Manager as a Provider

1. Click the **+** sign to view what records a provider has to sign still or reject.
2. The **Service Record Management** page will display all Service Records and their statuses: **Rejected**, **Signed**, and **Not Signed**.
3. To review and edit these records, select the check box next to the date and view the persons you have served. The status of the service record is color-coded, with red indicating missing or incorrect information, yellow indicating a warning that something is missing but not required, and green indicating that the record is ready for signing and approval.
4. To determine what information is missing from a record, click the time block to view the messages and directly edit the **End Time**, **Delete**, **Sign**, or **Transfer** the record within the window.
5. Click **Save & Close**.

## How Supervisor Approval & Signing Works in Case Manager

1. Supervisors will follow the same process as detailed above for **Approvals**.
2. Supervisors/providers should pay attention to the count displayed for services records you and your staff entered.
3. Users should navigate to the triangle icon next to the provider's name to view session details for each session created
4. Whether a supervisor or provider, all signed and approved records disappear from the **Sign/Approve** screen upon completion.





## Editing Records in Case Manager

Mistakes are possible when signing and approving records, and Vertex allows users to correct these errors within the system. Users can create an audit trail to track changes when this does happen, but you should note that there are some limitations as to when records cannot be edited.

Please note that records in a billing batch must first have the batch deleted before editing the record. Moreover, already billed records cannot be changed until the invoice is voided in service billing. The record can then be updated in Case Manager.

1. Select **Documentation** from the **Menu**.
2. Use the filters available to find your designated client and the date you must correct.
3. Select the pencil to the left of the record, then select **Reject** to edit the record.
4. Enter your notation as to why it is being rejected. Then click **Save & Close** once entered.
5. Reopen the record by clicking the pencil icon.
6. Edit your desired items, whether changing the location, activity, or provider on the **Service Record** page. From there, transfer the rejected record.
7. Make your desired changes to the fields and click **Save & Close**.
8. Once all changes have been made, you'll need to **Sign or Approve** the record, which will then be quickly replicated in the Billing Manager module.

## Your IDD Agency Needs Comprehensive Case Management Software

Contact our team to learn more about how Vertex Systems' Case Manager can improve operations at your organization.



Vertex Systems delivers superior information management solutions and support services that help unlock the potential of human services organizations and maximize their ability to make a difference. Our vision is to be the premier and preferred provider of information management products and services to human services agencies.