The Consumer Direct Care Network Portal, or CDCN Portal is a secure website that provides online payroll and budget management tools to individuals who receive services through a Consumer Direct Care Network company.

Online time entry and approval through this secure website provides an efficient and error-minimizing way to enter time directly into the Consumer Direct payroll system. Electronic time sheets provide information on the status of all time and payroll entries.

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Note on Terminology:

People enrolled in a Medicaid program and who receive Consumer Direct payroll services are called a "Participant" in the CDCN Portal. They may also be referred to as an "Employer".

Workers who provide services to the Medicaid recipient are called a "Caregiver" in the CDCN Portal. They may also be referred to as an "Employee".
Registration Steps

Already registered? See page 5 for an Overview of Time Entry and Approval

1. **Click on the Register button on the CDCN Portal (Figure 2)** to open the registration page.

2. **Enter your email address and click the Send Verification Code button.**
   An email address is required to register. Enter your email address in the top-most field and click the “Send verification code” button (Figure 3).

3. **Retrieve and confirm your verification code.**
   Upon clicking the “Send verification code” button, a code will be sent to the email address you provided in the box above the button from Microsoft. Check your email for the code. The code will be a numeric code, in an email similar to the one shown below.

   ![Figure 3: Registration Page Fields](image)

   Copy and paste the code, or type the code into the box that appears below the email address labeled “verification code” (Figure 4).

   If you did not receive the code in your email inbox, look in your junk mail, for it may have been marked as spam. You may also click on “Send new code” to have another code sent if both of the above fail.

   ![Figure 4: Verify Code](image)

   **Continued next page**
Registration, cont.

4 Enter a password in the New Password field.
Your password must be between 8 and 16 characters. It must contain a combination of lowercase, uppercase and special characters and digits as explained in the accompanying red text above the password entry fields (Figure 5).

5 Retype the same Password in the Confirm New Password field.
The password must match exactly the New Password.

6 Enter your name in the First Name and Last Name fields.
As seen in Figure 2, on page 2

7 Select your Role.
Click in the field labeled “Role” to receive a listing of roles in the system (Figure 6).
Workers providing care to program participants will select “Caregiver”.
Program participants will select “Participant”.
An authorized or designated representative of a participant who provides employer functions will choose “Designated Representative”.

8 Choose the state where service is provided.
Click in the field labeled “State” to receive a listing of states where Consumer Direct Care Network companies operate (Figure 7).
Select the state where the Participant resides and service is delivered.
Registration, cont.

9 Enter your primary phone number in the bottom most field labeled “Phone” (Figure 7.1).
A Consumer Direct representative will contact you at this number or by email to confirm your registration. This is a security step to prevent someone from impersonating you. Please enter only numbers in this field. Do not enter any parentheses “( )” or dashes/hyphens “ - ”.

10 Click the Create button to finish the registration process (Figure 7.2).
Once you have completed all the necessary information, click the “Create” button to finish your registration process at CDCNPortal.com.

Important!
Completing Registration is only the first step towards using the Portal. See “Finalizing Account Setup,” below.

Finalizing Account Set Up

Now that we've received your registration, setup can be finished.

After registration, and all enrollment paperwork has been submitted, we can begin finalizing your portal account. This typically takes between two and five business days.

During this time, users can sign-in to check on their activation status. While incomplete, a message like the one below will be displayed (Figure 7.3).

Figure 7.3: Phone Number entry field
Overview: Time Entry and Approval

Upon completion of a scheduled shift, the employee (Caregiver) will log onto the CDCN Portal and enter the shift worked. Time entry for each shift will include the Participant’s name, the service provided (Service Code, if applicable), and beginning and ending shift times. In some situations, tasks performed and other service information must also be logged.

The employee (Caregiver) submits their shift(s) for their employer’s approval.

The Participant (or their Designated Representative) will log into the CDCN Portal to review and approve the employee’s time. Time may be approved at any point after caregiver submission, however time entered must be approved by the end of the work week for caregivers to be paid without delay.

Once the time has been approved by the Participant (or their Designated Representative), entries can be processed and paid by Consumer Direct.

Time should be submitted by the Caregiver, and Approved by the Participant each Monday before midnight.

Notice For Caregivers

Even though you have registered, you are NOT authorized to perform ANY work until you receive an official OK to work.

Time Legend

As you work through the next sections and learn about time entry, the legend below will help explain time entry statuses.

![Legend]

Figure 7.4: Portal Symbol Legend
Caregiver Time Entry Steps

1. Click on the “Sign In” button on the CDCN Portal home page.
   Click on the green “Sign in” button. Please remember, you must register and be completely verified in our system to enter time. Registration instructions are on page 2.

2. Enter the email address and password you created at registration to enter the site (Figure 7.5).

   Once logged in, you will be directed to a “dashboard”.
   The Dashboard contains a lot of information, listed in the box to the right.
   - Outstanding time and mileage entries (time or mileage entered, but not yet submitted for approval).
   - A list of Participants the caregiver works for.
   - Announcements.
   - Buttons to access:
     - time and mileage entry
     - pay stubs
     - job postings
     - trainings
     - FAQs

Figure 8. My Dashboard (Caregiver)
Caregiver Time Entry Steps, cont.

4. **Click on the ‘Time/Mileage Entry’ Button.**
   From the upper right part of the Dashboard, click on the Time/Mileage Entry button to get to the time entry screen.

5. **Select week of service.**
   Select which week you wish to begin time entry for by using the back or forward arrows in the top right corner of the Dashboard (Figure 9).

6. **Select the Participant you will enter time for from the drop down list** (Figure 10).

7. **Click in the cell for the day of the work week you wish to enter time for** (Figure 11).

8. **Enter shift details** (Figure 12).
   Fill in the information for the shift worked in the pane on the right hand side of screen that appears after you click a cell representing a date in the calendar. The pane will pre-populate with the service code and date of service. These values can be changed here, if need be. Adjust the “Time In” and “Time Out” as needed by either clicking on the up or down arrows or typing in the value in hours and minutes.
Click the Save or Submit button to complete the time entry.

Select “Save” to save your time entry. You will need to submit it to your Participant/Employer at a later time. Select “Submit” to immediately submit the time worked to your Participant/Employer. If you choose to submit the shift, you may be required to complete additional actions as shown in Figure 13. Additional actions are program dependent, and may not apply to you. For example, in some Medicaid programs, the Caregiver must provide information on tasks performed.

Submitting Shifts

After the shift(s) have been entered and you want to submit time to be approved by the Participant/Employer, you may choose to select and submit one shift (Figure 14), multiple shifts (Figure 15) or all shifts for the work-week (Figure 16).

To submit one shift:

Click in the cell you wish to submit, make sure the “Additional Actions” have been completed, then click the “Submit Entries” button.
Caregiver Time Entry Steps, cont.

11 To Submit Multiple Shifts:
If you choose to submit multiple shifts, you may click on a row to submit the entire row (Figure 15, the entire row highlights yellow). Make sure all Additional Actions are complete and click the “Submit Entries” button. Note: if you try to submit an entire row or week and any shift requires additional action as shown with the yellow “Action Required” icon, the system will prompt you to complete the action before allowing submittal.

![Figure 15. Submitting an entire row of shifts](image)

12 To Submit an Entire Week:
You may also select the entire week by clicking on the box in the top left hand corner of the grid, next to the word “Participant”. Make sure all Additional Actions are complete and click the “Submit Entries” button.

![Figure 16. Submitting an entire week of shifts](image)

13 Attest that your entry is true and accurate.
Upon clicking the “Submit” button, you will be presented with an Attestation clause (Figure 17). Click “OK” to agree that the information entered is true and accurate. Shifts are now marked with a purple “Submitted” symbol indicating the process is complete. The Participant/Employer will now need to review submitted shifts for approval.

![Figure 17. Attestation statement](image)
Participant Time Approval

1. Click on the “Sign In” button on the CDCN Portal home page.
   When your worker has completed one or more shifts, or at the end of the work week, click on the green “Sign in” button. Please remember, you must register and be completely verified in our system to review and approve time entries. Registration instructions are on page 2.

2. Enter the email address and password you created at registration to enter the site (Figure 17.1).

   Once logged in, you will be directed to a “dashboard” (Figure 18).
   The Dashboard contains a lot of information.

Dashboards Include:
- Time that needs to be submitted for approval
- A listing of Caregivers that work for you
- Announcements
- Access to Trainings
- Access to FAQ’s.

Figure 17.1: Sign In fields

Figure 18: My Dashboard
Participant Time Approval, cont.

4 Click on the “Time/Mileage Entry” button.
From the upper right part of the Dashboard, click on the “Time/Mileage Entry” button to get to the time entry approval screen.

5 Select which Caregiver to approve time for.
If you have multiple Caregivers, select which you want to approve time for in the drop down box as shown in Figure 19.

Approving Employee Work Time.

You can choose to approve one shift at a time, a row at a time or an entire week at a time.

6 To approve one shift:
Click in a cell where time has been submitted. When you click in a cell, the cell turns color and you will see a pane on the right hand side of the screen. Review all information in the pane and if correct, click “Approve” (Figure 20).

Figure 19. Select Caregiver

Figure 20. Approving a single shift
Participant Time Approval, cont.

7 To Approve One Row:
If you choose to approve one row of time, click in the box next to the Caregiver’s name in the row (Figure 21). The entire row will change color. Once the row is selected, click on the “Approve” button to complete the process.

8 Approve an Entire Week:
Similarly, you can choose to approve the entire week by clicking the checkbox in the top left hand corner of the grid, next to the word “Caregiver”.

9 Answer service questions, or approve tasks (if applicable).
After you have clicked on the “Approve” button, you may be asked to answers some service questions, if they apply to your program. Please answer the questions and click “Approve.” If your program does not require these, you will not be asked.
Participant Time Approval, cont.

10 **Attest that your entry is true and accurate.**

Once you click the “Approve” button, you will be presented with an Attestation statement (Figure 17, same as Caregiver attestation). Click “OK” to agree that the information entered is true and accurate. You will now see all shifts you approved are marked with a blue “Approved” check mark (Figure 23). Note: Status symbols used on time entry and approval screens are presented in figure 24.

![Figure 23. Approved shifts](image)

![Figure 24. Status symbol legend](image)
Resetting A Password

If a password is forgotten or misplaced, it can be changed at the CDCN Portal Sign In screen. Resetting a password is a two step process. First step is account verification, to make sure the password is changed by the user. The second is submitting a new password.

1. On the CDCN Portal Home page, click the "Can’t access your account?” hyperlink located under the "Sign In" button (Figure 25).

2. In the next screen, first enter your email address in the top field (Figure 26). Then enter the letters displayed in the image into the bottom field. These characters are often difficult to read. If you can’t make out what they are, click the ‘reset’ button for a new set of letters, or the audio button to hear them (your computer or electronic device will need to be sound enabled).

   When both fields have been filled, click "Next."

3. Click the blue ‘Email’ Button when prompted to choose how to receive your verification code (Figure 27).

4. Check your email inbox for the verification code. The message should contain an image similar to the one displayed in Figure 28. Find and copy, or memorize, the six digit verification code. You will need this code for step five.
Resetting A Password, cont.

5. Enter the 6 digit code from the verification email into the password change form (Figure 29). Then click "Next."

6. Enter a new password into the form, then enter it again to confirm the change (Figure 30). Remember that passwords must be a combination of letters, numbers and symbols.

Click "Finish."

7. Your password should now be reset, and you should see a confirm message, as show in step 8 (Figure 31).

You’ll also receive an email confirmation that your password has been reset (Figure 32).

8. Click the "Click Here" link to return to the portal and sign in with your new password.
Frequently Asked Questions

Where can I find instructions?
This document contains Portal Instructions. A table of contents is on page 1.

What devices/browsers does the Portal Support?
Internet Explorer is preferred and provides the best experience. Firefox is an acceptable alternative.

Mobile devices may also be used, however connection speeds may affect performance. WiFi connections seem to be the most reliable.

REGISTRATION

Who needs to register?
Everyone! All paid Caregivers (regular or emergency), Participants and Authorized Representatives (when applicable.) Please note that Participants must register even if they have an Authorized Representative.

What will I need to register?
You’ll need:

- a phone number (enter ONLY the numbers 0 through 9 during registration, for example 2027621401).
- an email address and,
- a password which meets the web portal requirements. The password requirements are as follows:
  - 8-16 characters
  - containing 3 out of 4 of the following:
    - lowercase characters
    - uppercase characters
    - digits (0-9)
    - one or more of the following symbols:
      @ # $ % ^ & * - _ + = [ ] { } | \ : ' , ? / ` ~ " ( ) ;

I don’t have an email address, how do I register?
An email address is required for registration. Free

Email services are available. Some of the more popular ones include:
- https://www.gmail.com
- https://www.yahoo.com
- https://www.outlook.com

When can I register?
Registration can be completed at any time (the earlier, the better!) No one can bill for time unless they have a current budget and have been set up by Consumer Direct.

What happens after I register?
Consumer Direct admin staff will need to load program setup information into the portal so that time entries can be input by Caregivers and approved by Employers. This may take a few days. We encourage you to check back on the portal to see when this step has occurred and you can begin utilizing the web portal.

Please make Consumer Direct staff aware of persistent issues with utilizing the web portal so that we can help to ensure a speedy resolution!

I’ve tried to register multiple times with no success. I have checked my junk mail for a verification code, and nothing seems to work.
Contact Consumer Direct. It is possible that we may need to reset the registration process for you.

CAREGIVER FAQ

Why haven’t I been paid?
Please check that your time has been submitted for approval. Following that, the participant you are providing services to may not have approved the time yet. There may be other reasons. You may call us to help.

More questions, next page
Frequently Asked Questions, cont.

Where can I print a pay stub?
If you have worked during the last pay period, a copy of your paystub can be found by accessing your dashboard and clicking the "Pay Stub Reports" button on the upper right part of the page.

Where can I get a copy of my W2?
To receive a copy of your W2, please call Consumer Direct.

Can I request a printed copy of new employee paperwork through the Portal?
You can find employment paperwork on your local CDCN website.

I'm interested in working, but don't have a Participant. Should I register?
It is unnecessary to register before you have a client/employer. You may check our provider directory to see if any opportunities are available in your region at https://providers.consumerdirectcare.com/. You may also call Consumer Direct with inquiries.

How do I enter a full day or a shift that spans several calendar days?
A Portal "day" begins at 12:00 am and ends at 11:59 p.m. If you perform work that spans multiple days, say from Tuesday at 8 p.m. to Wednesday at 4 am, your time will need to be entered as two different shifts:

- Tuesday from 8:00 p.m. until 11:59 p.m., and
- Wednesday from 12:00 a.m. until 4:00 a.m.

I've submitted time and my participant isn’t seeing it for approval.
Check your dashboard to see if the time has been submitted. This will be in the "status column." If there are outstanding tasks for your shift, you may need to mark these complete before your time will be successfully submitted.

I'm a caregiver and I submitted my time incorrectly. What can I do?
Contact the participant you are providing services to and ask them to reject the time. Once that is done, you can make changes and resubmit. Or you can delete it. If the time has already been approved and submitted to Consumer Direct, our administrative staff will need to help.

PARTICIPANT/REPRESENTATIVE FAQ

How do I delete Approved Time?
Approved and submitted time can not be deleted through the Portal. Please call Consumer Direct to prevent time from being wrongly paid.

Where can I find my reports?
Participant Reports can be accessed from the Profile screen. When at the dashboard, click your name in the upper right area of the screen to view your profile.

I am a Designated Representative. How do I act on behalf of my Participant?
You can register as a Designated Representative on the Portal. The participant you are representing will also need to be registered. When you have both completed registration, Consumer Direct admin staff can link your accounts.