Interactive Voice Response (IVR) System User Guide

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Introduction

When the Agency for Persons with Disabilities (APD) became your CDC+ Fiscal/ Employer Agent on March 1, 2008, you began submitting your employees' timesheets, vendors' and independent contractors' invoices, and requests for reimbursement either electronically via the Web or by calling APD's Customer Service Center.

This user guide has been written to help you become familiar with how to use the IVR system. It provides you with the sequence of commands you will hear and the choices you will be given, which you will then enter into your telephone. The user guide is available in both English and Spanish.

Customer Service staff will be available to assist you if you have questions as you learn the IVR system, but Customer Service staff will no longer be taking payroll over the telephone.

As always, please call Customer Service at 1-866-761-7043 if you have questions.

Your CDC+ Unit
Agency for Persons with Disabilities

CDC+ Interactive Voice Response (IVR) User Guide

<u>Logging in to the IVR System</u>

Dial the Toll-Free Telephone Number Provided by APD CDC+: **1-866-472-8678**	Welcome message says, "Hello and welcome to the CDC+ automated telephone payment request system. For English, press 1; for Spanish, press 2"
Press "1"	"Please enter your User ID number, followed by the pound (#) sign."
Enter your User ID	Enter the User ID you received from CDC+ in the mail. If you enter a valid User ID, you will be prompted to enter your password.
	If you enter an invalid User ID, you will hear: *"The User ID number you entered is not a valid ID number. To retry, press 1; to hang up and call back, press 2."* Press 1 to correct your entry.
Enter your password Provided to You by CDC+ Customer Service	If the password you entered is valid, you will hear: "To enter a timesheet, press 1; an invoice, press 2; a reimbursement, press 3. If you would like to be transferred to CDC+ Customer Service, press 4. To hang up, press 5."
	If the password is invalid, you will hear: *"The password you entered is not correct. To retry, press 1; to hang up and call back, press 2."* Press 1 to correct your entry.
	Note: After three failed login attempts (whether due to incorrect User ID, password or both) you will be locked out of the IVR system for 30 minutes. During this time you will not be able to use the IVR phone system to submit claims.

Submitting a Timesheet

If You Press 1 to Enter a Timesheet	Enter the Provider ID for the provider for whom you wish to report hours worked, followed by the pound (#) sign. If your Provider's number includes the letter "A," enter this by pressing STAR 2 (*2). For Providers with numbers that include the letter "P," press STAR 7 (*7). **For example: ID number A00345 would be entered as *- 2-zero-zero-3-4-5-#. ID number P01234 would be entered as *-7-zero-1-2-3-4-#.**
	If you enter a Provider ID that is not approved on your most current Purchasing Plan, you will hear the following error message: *"You have entered a Provider Number that is not on your purchasing plan. To correct your entry, press 1; to cancel this entry and return to the main menu, press 2."* Press 1 to correct your entry.
Enter Live-In Status	If your employee is a Live-In, press "1" when prompted. If not, press "2."
Enter the Workweek	Enter the 2-digit month and 2-digit day of the **Sunday** which is the last day of the workweek, followed by the pound (#) sign. For example, March 1 would be 0-3-0-1-#. **Only dates that are Sundays will be accepted for entering a timesheet. Note: Entering the year is not necessary on the IVR system. It is automatically calculated for the user.**
	Note: Timesheets can only be submitted for hours worked in the last six weeks. Timesheets older than this cannot be entered using the IVR system and must be entered by Customer Service by calling 1-866-761-7043.
	If you enter a date that is not valid, you will hear the following error message: *"You have entered a date of service that is not valid for the provider you entered. To correct your entry, press 1; to cancel this entry and return to the main menu, press 2."* Press 1 to correct your entry.

Submitting a Timesheet (cont'd)

Enter the Service Code	Enter the Service Code which your employee worked for the workweek, followed by the pound (#) sign. To enter a service code that is 2 digits followed by the letter A, enter the 2 numbers and then press STAR 2 for the letter A. For example, the service code for a physical therapy assessment is 38A. You would enter 3-8-*-2-#.
	If this employee worked under more than one Service Code for the specified period, you will be able to add this information once you have completed this claim.
	If you enter a Service Code that is invalid for the date or provider entered, you will hear the following error message: *"You have entered an invalid service code. To correct your entry, press 1; to cancel this entry and return to the main menu, press 2."* Press 1 to correct your entry.
Enter Plan Section (if applicable)	Please indicate the section of your purchasing plan in which this service was budgeted: for Services, enter 1; for Savings, enter 2; for a Short-Term Expenditure, press 3; for a One-Time Expenditure, press 4.
	Note: This option will only be available if the worker for whom you are entering time is listed on your current purchasing plan under more than one section.
	If you enter a plan section for which your provider is not approved, you will hear the following error message: *"You have entered a section that is not valid for the service code you entered. To correct your entry, press 1; to cancel this entry and return to the main menu, press 2."* Press 1 to correct your entry.
EBU (if applicable)	If the hours entered for this employee were worked as a regular provider, press 1. If this employee worked these hours as an Emergency Backup (EBU), press 2.

Submitting a Timesheet (cont'd)

Entering Hours and Minutes	You will enter 5 digits for the number of hours and minutes worked for this provider this week. Minutes must be rounded to the nearest quarter hour (:00, :15, :30, or :45). Press the pound (#) sign to confirm your entry.
	Example: One hour and 10 minutes of work would be entered as 0-0-1-1-5. One hundred hours and 40 minutes would be entered as 1-0-0-4-5.
	If your time entry is not approved, you will hear an error message. To correct your entry, press 1 when prompted.
Confirmation of Submission	Once you have correctly entered the number of hours and minutes worked for this employee, the IVR system will read back to you the entry you just completed. **Please take this opportunity to ensure that your claim has been submitted properly.**
	If the message you hear correctly states the timesheet you wish to submit, press 1. To correct your entry, press 2.
	If you enter hours for a week and Service Code that have already been entered for this provider, you will hear the following error message: *"Your entry duplicates a transaction that has already been entered."* Press 1 to correct your entry.
	PLEASE WAIT FOR YOUR TRANSACTION ID. The system will inform you of your tracking number for this timesheet. Please do not hang up before you receive this information. **Write this number down for future reference.**
Additional Hours/Service Codes	If you would like to enter additional hours for a separate Service Code for this employee, press 1. If you are finished with this employee's timesheet, press 2.
	If you press 2, you will be directed to the main menu.
	If you press 1, you will rebegin the timesheet menu to enter the next Service Code.

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Submitting an Invoice

If You Press 2 to Enter an Invoice	Enter the Provider ID for the provider for whom you wish to enter an invoice, followed by the pound (#) sign. If your provider's number includes the letter "A," you would enter this by pressing STAR 2 (*2). For providers with numbers that include the letter "P," you would press STAR 7 (*7). **For example: ID number A00345 would be entered as *-2-zero-zero-3-4-5-#. ID number P01234 would be entered as *-7-zero-1-2-3-4-#.**
	If you enter a Provider ID that is not approved on your most current Purchasing Plan, you will hear the following error message: *"You have entered a Provider Number that is not on your purchasing plan. To correct your entry, press 1; to cancel this entry and return to the main menu, press 2."* Press 1 to correct your entry.
Enter the Invoice Date	Enter the invoice date listed on the provider's invoice, followed by the (#) sign. **The invoice date must be entered as a 2-digit month and a 2-digit day.** **For example, November 3 would be entered as 1-1-0-3-#.** **Note: Entering the year is not necessary on the IVR system. It is automatically calculated for the user.**
	Note: You cannot enter an invoice older than 6 months using the IVR system. You must call a CDC+ Customer Service Representative at 1-866-761-7043. **To correct your entry, press 1 when prompted.** **To cancel the entry and call Customer Service, press 2.**
Enter Work Begin Date	Enter the first day this service was provided during the month. Enter 2 digits for the month, then 2 digits for the day.

Submitting an Invoice (cont'd)

Enter Work End Date	Enter the last day this service was provided during the month. Enter 2 digits for the month, then 2 digits for the day.
	Note: The end date selected cannot be after the invoice date or before the start date entered, nor can the end date be a future date. **To correct this entry, press 1 when prompted.**
Enter the Service Code	Enter the Service Code for which you are being billed, followed by the pound (#) sign. To enter a service code that is 2 digits followed by the letter A, enter the 2 numbers and then press STAR 2 for the letter A. For example, the service code for a physical therapy assessment is 38A. You would enter 3-8-*-2-#.
	If this invoice bills the consumer for more than one Service Code for the specified period, you will be able to add this information once you have completed this claim.
	If you enter a Service Code that is invalid for the date or provider entered, you will hear the following error message: *"You have entered an invalid Service Code. To correct your entry, press 1; to cancel this entry and return to the main menu, press 2."* Press 1 to correct your entry.
Enter Plan Section (if applicable)	**Please indicate the section of your purchasing plan in which this service was budgeted: for Services, press *1*; for Savings, press *2*; for a Short-Term Expenditure, press 3; for a One-Time Expenditure, press 4**.
	Note: This option will only be available if the independent contractor or vendor for whom you are entering time is listed on your current purchasing plan under more than one Section.
	If you enter a plan section for which your provider is not approved, you will hear the following error message: *"You have entered a section that is not valid for the service code you entered. To correct your entry, press 1; to cancel this entry and return to the main menu, press 2."* Press 1 to correct your entry.

Submitting an Invoice (cont'd)

EBU (if applicable)	If the provider performed these services as a regular provider, press 1. If this provider performed these services as an Emergency Backup (EBU), press 2.
Enter the Invoice Amount	Enter the invoice amount for the service provided, followed by the pound (#) sign.
	Note: Your total invoice amount for any provider (for all Service Codes) must be less than $10,000 when using the IVR system. If a provider has given you an invoice with an amount due that is more than $9,999, your claim must be submitted by calling Customer Service at 1-866-761-7043.
Confirmation of Submission	Once you have correctly entered the invoice amount for this provider, the IVR system will read back to you the entry you just completed. **Please take this opportunity to ensure that your claim has been submitted properly.**
	If the message you hear correctly states the invoice you wish to submit, press 1. To correct your entry, press 2.
	PLEASE WAIT FOR YOUR *TRANSACTION ID.* The system will inform you of your tracking number for this invoice. Please do not hang up before you receive this information. **Write this number down for future reference.**
Additional Amount/Service Codes	If you would like to enter additional services for the same invoice, press 1. If you are finished with this provider's invoice, press 2.
	If you press 2, you will be directed to the main menu.
	If you press 1, you will rebegin the invoice menu to enter the next Service Code.

Submitting a Reimbursement

If You Press 3 to Enter a Reimbursement: Enter Work Begin Date	Enter the first day of the reimbursement period. Enter 2 digits for the month, then 2 digits for the day. **For example, November 3 would be entered as 1-1-0-3-#.** **Note: Entering the year is not necessary on the IVR system. It is automatically calculated for the user.**
	Note: Reimbursement claims can only be submitted for services/products paid for in the last six weeks. Reimbursement claims older than this cannot be entered using the IVR system and must be entered by Customer Service by calling 1-866-761-7043.
Enter Work End Date	Enter the last day of the reimbursement period. Enter 2 digits for the month, then 2 digits for the day.
Enter the Service Code	Enter the Service Code for which you are requesting reimbursement, followed by the pound (#) sign. To enter a service code that is 2 digits followed by the letter A, enter the 2 numbers and then press STAR 2 for the letter A. For example, the service code for a physical therapy assessment is 38A. You would enter 3-8-*-2-#.
	If you enter a Service Code that is invalid for the date entered, you will hear the following error message: *"You have entered a code you are not approved for. To correct your entry, press 1; to cancel this entry and return to the main menu, press 2."* Press 1 to correct your entry.
Select Payee	Select whether this reimbursement is to be made out to the consumer or the consumer's representative. To select consumer, press 1. To have the reimbursement paid to the representative, press 2.
	Note: If a consumer does not have a representative actively on file with CDC+, you cannot select option 2. In the event that you do select option 2 in error, press 1 to correct your entry when prompted.

Submitting a Reimbursement (cont'd)

Enter Reimbursement Amount	Enter the amount you are requesting to be reimbursed, followed by the pound (#) sign. **Note: Your total reimbursement amount (for all Service Codes) must be less than $10,000 when using the IVR system. If you are requesting reimbursement for an amount more than $9,999, your claim must be submitted by calling Customer Service at 1-866-761-7043.**
Confirmation of Submission	Once you have correctly entered your reimbursement request, the IVR system will read back to you the entry you just completed. **Please take this opportunity to ensure that your claim has been submitted properly.** If the message you hear correctly states the reimbursement request you wish to submit, press 1. To correct your entry, press 2. **PLEASE WAIT FOR YOUR *TRANSACTION ID.*** The system will inform you of your <u>tracking number</u> for this reimbursement. Please do not hang up before you receive this information. **Write this number down for future reference.**
Additional Amount/Service Codes	If you would like to enter additional services for the same reimbursement, press 1. If you are finished with this reimbursement request, press 2. If you press 2, you will be directed to the main menu. If you press 1, you will rebegin the reimbursement menu to enter the next Service Code.

IVR Cheat Sheet

Timesheet Claims

WEEK 1

	End Date:				
Provider ID	Service Code	Plan Section	EBU?	Hours	Minutes

WEEK 2

	End Date:				
Provider ID	Service Code	Plan Section	EBU?	Hours	Minutes

Invoice Claims

Provider ID	Invoice Date	Work Begin Date	Work End Date	Service Code	Plan Section	EBU?	Amount

Reimbursement Claims

Begin Date	End Date	Service Code	Payee: Cons/Rep	Amount