STATE OF CALIFORNIA
CALIFORNIA DEPARTMENT OF AGING
Emergency Remote Services (ERS) PORTAL INSTRUCTIONS

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OVERVIEW

Process for ERS Submission/Reporting:

1. After the initiation of ERS, submit a CDA 4000 - CBAS Emergency Remote Services (ERS) Initiation Form (CEIF) via the Peach Portal. Consult CDA 4000i for instructions. After CEIF submission, the ERS Event which corresponds to the individual participant will be moved to the **Active ERS Events** tab in the Peach Portal.
2. Submit completed CEIF (CDA 4000) to the participant's Managed Care Plan within three working days of the first date of ERS, unless otherwise specified due to a widespread public emergency.
3. Providers are required to update the ERS Event each month by the 10th day of the following month by reporting individual attendance days according to the instructions below. For example, ERS attendance days for the month of June should be reported by July 10th.
4. Once the participant has concluded ERS associated with an emergency, providers should close the ERS Event.

INSTRUCTIONS FOR ERS MONTHLY REPORTING

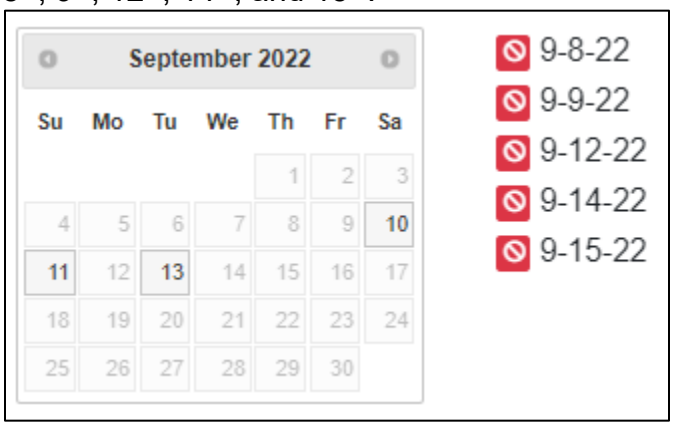
Accessing the ERS Portal

1. Log in to the Peach Portal.
2. Select ERS from the list of options.
3. Choose the appropriate center from the **Center** dropdown menu.

Updating Participant ERS Attendance Dates

After submitting the CDA 4000 (CEIF), the ERS Event corresponding to the individual participant experiencing the emergency will be moved to the **Active ERS Events** tab. From here, providers should update individual attendance dates until the conclusion of ERS.

1. Select the **Active ERS Events** tab.
2. Select the icon next to the corresponding participant's name.
3. Select **Attendance Dates**.
4. Select all dates from the calendar in which the participant received ERS for the current CEIF. Once selected, all reported attendance dates will be listed to the right of the calendar. In the example below, the participant received ERS on September 8th, 9th, 12th, 14th, and 15th.

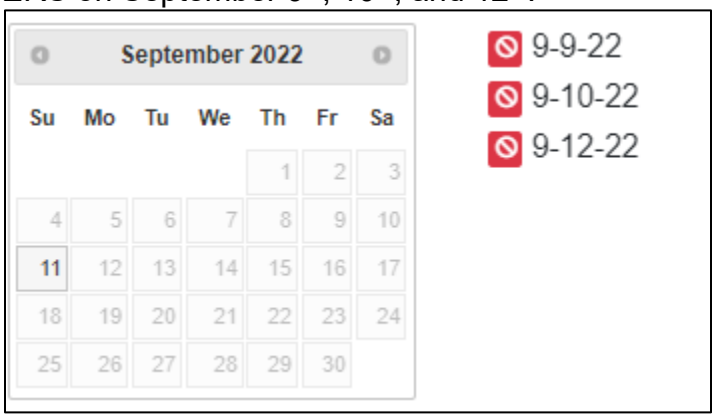


5. You can remove an attendance date by clicking on the icon next to the date you would like to remove.
6. Select Save Days.

Concluding ERS

1. After the conclusion of an ERS Event, providers should confirm that all attendance dates have been reported for the corresponding event.
   a. Select the **Active ERS Events** tab.
   b. Select the icon next to the corresponding participant's name.
   c. Select **Attendance Dates**.

d. Confirm that the dates listed to the right of the calendar are accurate ERS days. Example: The screenshot below shows that the participant received ERS on September 9th, 10th, and 12th.



e. Select Save Days if these days are accurate. If the days are inaccurate, edit the days accordingly.

2. Select the icon next to the corresponding participant's name.
3. Select **Close Event**.
4. The system will prompt "Are you sure you want to close this event? Select **Close Event** and the event will move to the **Closed ERS Events** tab.
5. A green box will appear in the righthand corner of the screen stating "Success – The event was closed successfully".

ERS PORTAL FEATURES

Bulk Initiation Form

Providers should use the Bulk Initiation Form feature to add multiple participants in the event there is a large-spread public emergency.

NOTE: Only participants that already exist in the database can be added using the Bulk Initiation Form feature (existing participants are pulled from previous Participant Characteristic Reports). Any new participants should be added individually using the standard **New Initiation Form**.

1. Select Bulk Initiation Form.
2. A New CEIF Form pop up box will appear.
3. Click on the **Participants** field or choose **Select All** to select all participants in the center's list of participants.
4. A dropdown menu will appear listing participants that are currently saved in the Peach database. Select all the participants who are experiencing the same public emergency. Any participants not listed in the participant dropdown menu must have

an ERS Event initiated via the standard CEIF process indicated in the CDA 4000i – CEIF Instructions.

5. Select the **Date of Emergency** by typing in a date in MM/DD/YYYY format or click on the calendar to select a date.
6. Select the **Emergency**.
7. The remaining fields are optional when completing a Bulk Initiation Form. Complete fields that all participants have in common or that apply to all participants. These fields can be updated later when submitting the individual CEIFs. For example: If all participants will receive telehealth, check the box for **Telehealth** under **Planned ERS supports and services**. When completing individual CEIFs, there may be some participants receiving In-Home, At the Home, or In the Community services, and that can be added at that time.
8. Select Initiate ERS. This will create an individual ERS Event/CEIF for each participant. The ERS Event/CEIF will now be listed in the **CEIF In Progress** tab. These ERS Events/CEIF will be saved so users can return to complete the remaining fields on the individual CEIF as time permits. Providers must complete each CDA 4000 (CEIF) individually from the **CEIF In Progress** tab.
9. Providers may need to update the payer for each individual participant if all participants are not covered by the same payer:
    a. Select the icon next to the participant.
    b. Select **Participant Details**.
    c. Select the **Payer** dropdown menu and choose the Managed Care Plan or Medi-Cal fee-for-service.
    d. Select Save.
    e. Repeat steps a - d above until all payers have been added for each participant.
10. Providers may need to update the emergency details for each participant:
    a. Select the icon next to the participant.
    b. Select **Emergency Details**.
    c. **Emergency** and **Date of Emergency** will already be completed.
    d. Enter the **Date of Participant Consent (if necessary and varies by participant, if the same for all participants leave as is)** by typing in the date or clicking on the calendar and selecting a date.
    e. Enter the **First Date ERS Provided (if necessary and varies by participant, if the same for all participants leave as is)** by typing in the date or clicking on the calendar and selecting a date.

f. Enter **Current TAR Date From** by typing in the date or clicking on the calendar and selecting a date.

g. Enter **Current TAR Date To** by typing in the date or clicking on the calendar and selecting a date.

h. Select Save.

i. Repeat steps a - h above until all dates have been added for each participant.

11. Providers may need to update the form details for each participant and will need to submit each individual CEIF with detailed information specific to that participant (must be submitted by Administrator or Program Director):

    a. Select the icon next to the participant. If the icon is not showing, check **Participant Details** and **Emergency Details** for completion as directed in steps 8 and 9.

    b. Complete any remaining fields and submit CEIF as directed in the CDA 4000i – CEIF Instructions. Remaining fields may include:

        i. Additional Circumstances Related to the Emergency

        ii. Description of Emergency

        iii. Background

        iv. Assessment

        v. Planned Emergency Services

        vi. Planned ERS supports and services will be provided via (delivery method)

        vii. Description of Proposed Services to be Provided

        viii. Dates & Signature

    c. Repeat steps a - c above until all details of the emergency situation have been added for each participant.

Saving a CEIF in Progress

Below are some guidelines for saving a CEIF in progress.

1. The Participant Details section must be complete to save an ERS event. This includes:

    a. Last Name

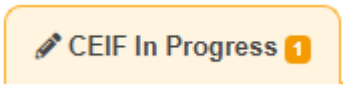
    b. First Name

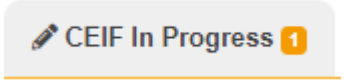
    c. Medi-Cal Identification Number # (CIN)

    d. Payer

2. After completing the Participant Details section, select **Next Emergency Details**. The Peach Portal will run a validation check to ensure all fields are complete and valid. If it passes, the ERS Event will be added to the **CEIF in Progress** tab and will be saved.
3. Once at the Next Emergency Details section, select **Cancel** to return to the ERS Portal and complete the remaining fields later.
4. To save any fields in the Emergency Details section, users must complete the entire section which includes:
    a. Emergency
    b. Date of Emergency
    c. Date of Participant Consent
    d. First Date ERS Provided
    e. Current TAR Date From
    f. Current TAR Date To
5. After completing the Emergency Details section, select **Next CEIF Form**. The Peach Portal will run a validation check to ensure all fields are complete and valid. If it passes, user will be taken to the CEIF Details section, and CEIF progress will be saved to the ERS Event. Select **Back to list** to complete the remaining fields later.
6. The Peach Portal will auto-save the CEIF Details section as providers complete the fields. Users can select **Back to list** at any time to go back to the ERS main page and complete the CEIF later.

Resuming a CEIF in Progress

1. Select the appropriate center
2. Confirm that the **CEIF in Progress** tab is active. Click on the tab to activate.
    a. Active tab: 

    b. Inactive tab: 

3. Find the desired ERS Event from the list and select the icon.
4. Select **Participant Details**, **Emergency Details**, or select the icon (CEIF Details).

NOTE: The icon (CEIF Details) will only be available if **Participant Details** and **Emergency Details** are complete. If providers do not see the icon, confirm that all fields contained in **Participant Details** and **Emergency Details** are complete by selecting the icon to the left of the participant and opening each section.