MISSOURI DEPARTMENT OF
HEALTH & SENIOR SERVICES

Division of Senior & Disability Services

HCBS FUSION
Provider End User Guide

Table of Contents

1 Log in

ABOUT THIS SECTION	This section describes how to access FUSION and reset your password.

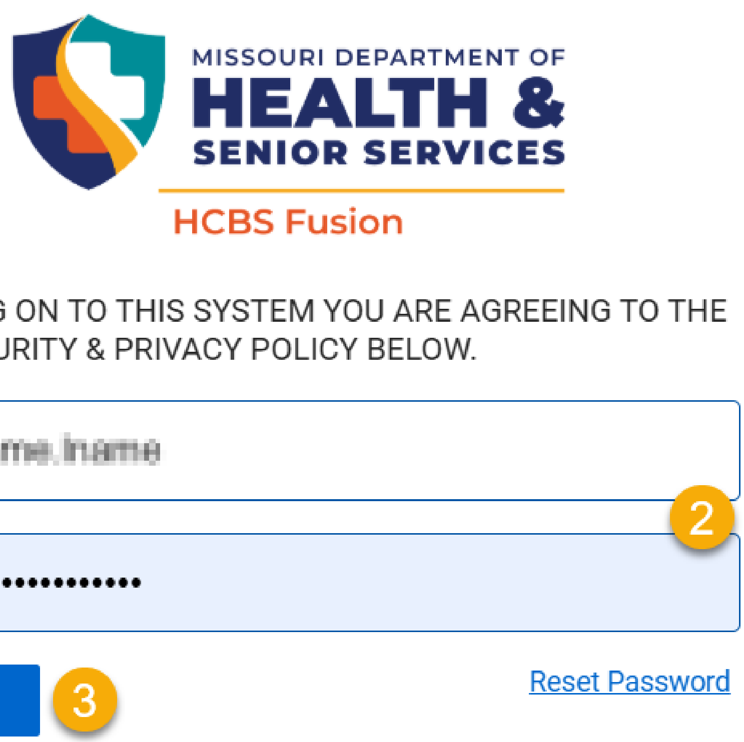
1.1 How to Log Into FUSION

❖ To log into FUSION:

Step 1: Open your web browser (e.g., Chrome, Edge, Safari) and go to: https://hcbsfusion.health.mo.gov/

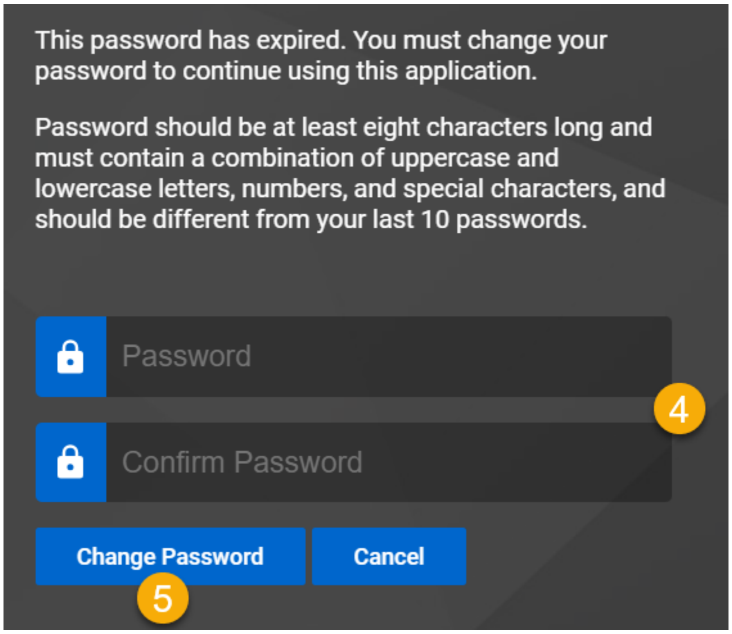
Step 2: Enter your DSDS-provided **Username** and temporary **Password**.

Step 3: Click the **Sign On** button



Step 4: When logging in for the first time, you must change your password. Read the password requirements and enter your new **Password**. Re-enter to **Confirm Password**.

Step 5: Click the **Change Password** button.

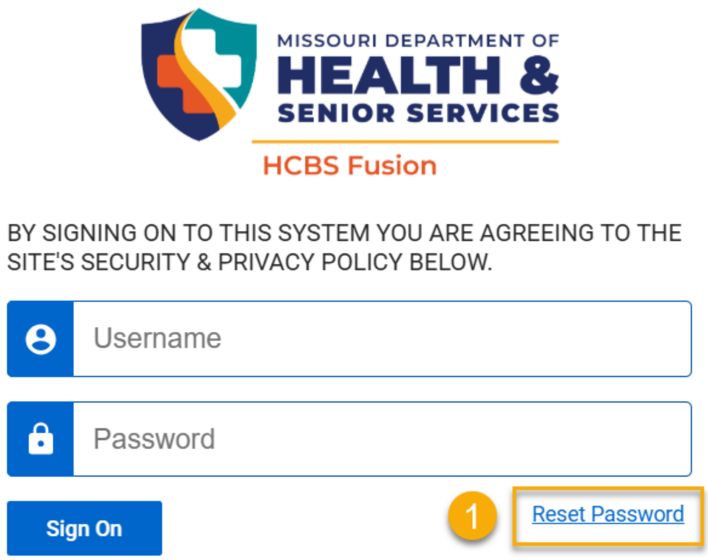


1.2 How to Reset your Password

While a password reset is enforced upon your first login, there may be instances where you wish to reset it proactively or need to do so at the request of DSDS.

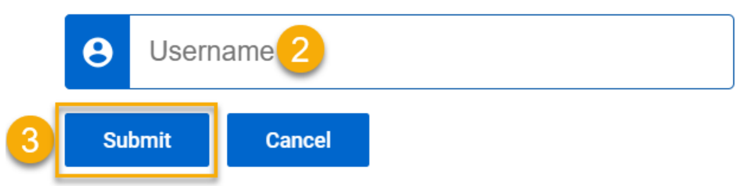
❖ **To reset your password:**

Step 1: Navigate to the login screen and click **Reset Password**.



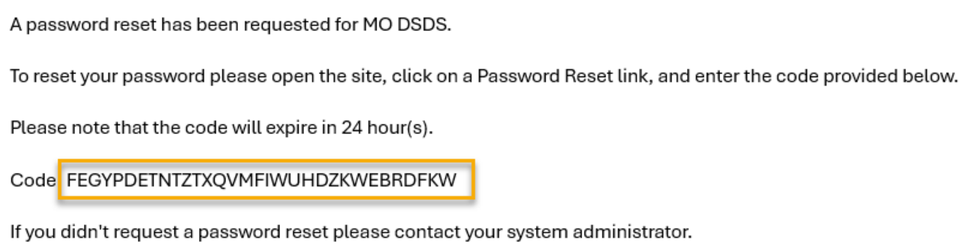
Step 2: Enter your **Username**.

Step 3: Click the **Submit** button.



A confirmation of your request submission is displayed saying an email has been sent to you with a confirmation code.

Step 4: Navigate to your email and open the item titled **Password Reset**. Highlight and **copy** the code provided within the email


A password reset has been requested for MO DSDS.

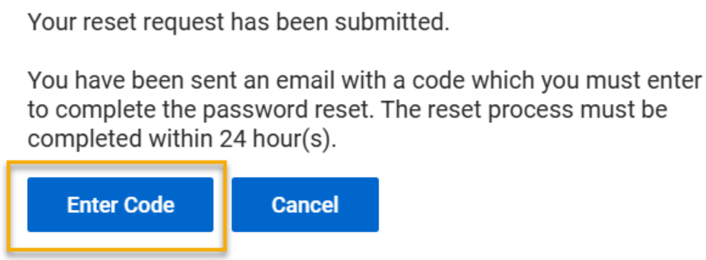
To reset your password please open the site, click on a Password Reset link, and enter the code provided below.

Please note that the code will expire in 24 hour(s).

Code FEGYPDETNTZTXQVMFIWUHDZKWEBRDFKW

If you didn't request a password reset please contact your system administrator.

Step 5: Return to the reset screen and click the **Enter Code** button.



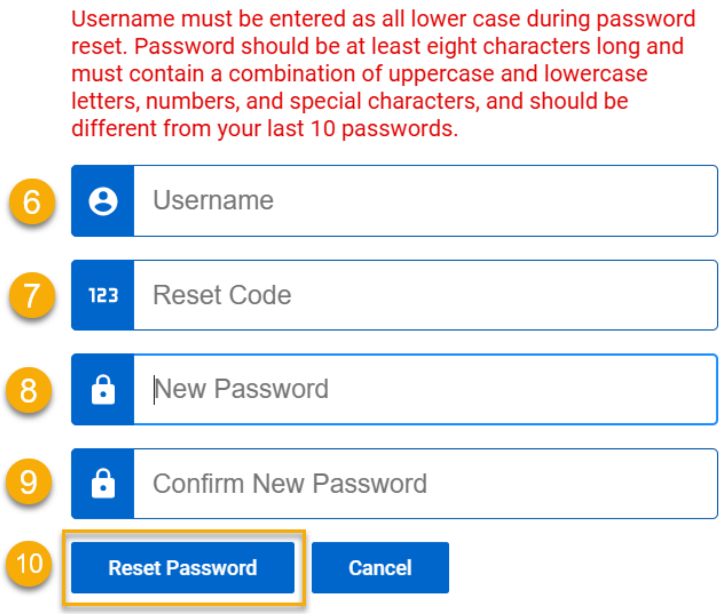
Step 6: Enter **Username**.

Step 7: **Paste** or **enter** the **Reset Code** from your email.

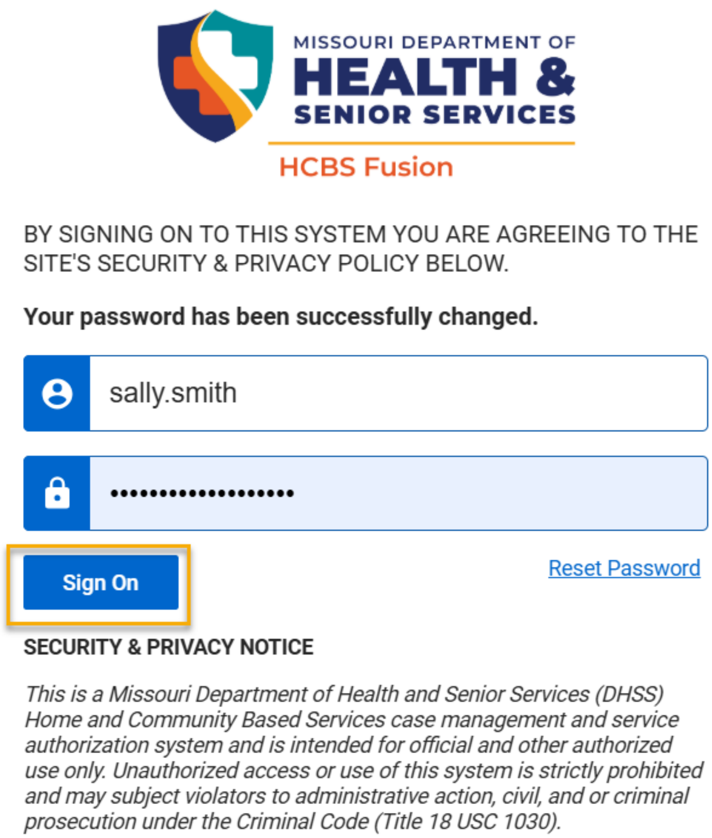
Step 8: Enter your **New Password**.

Step 9: Re-enter to **Confirm New Password.**

Step 10: Click on the **Reset Password** button.



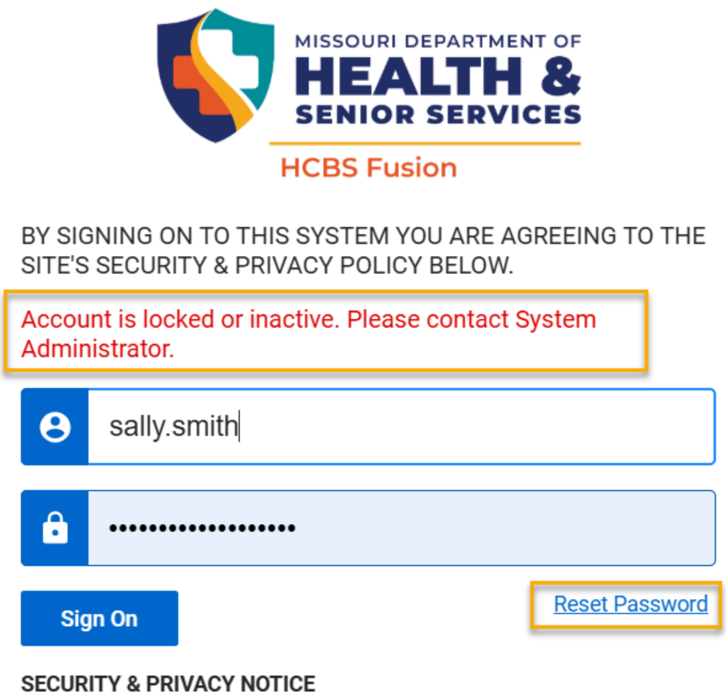
Step 11: Confirmation of the password change is provided. Click the **Sign On** button to login to FUSION.



1.3 Unlock a Locked Account

❖ To unlock a locked account:

Step 1: If the locked message is shown while trying to login, click on **Reset Password** and follow the instructions in Section 1.2.



2 Quick Links

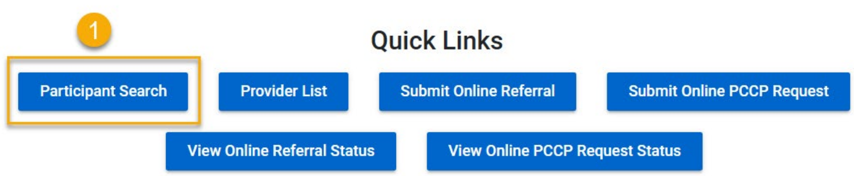
ABOUT THIS SECTION	This section describes how to use **Quick Links** from the home dashboard.

2.1 PARTICIPANT SEARCH

The home dashboard includes a participant search feature.

❖ **To search for a participant:**

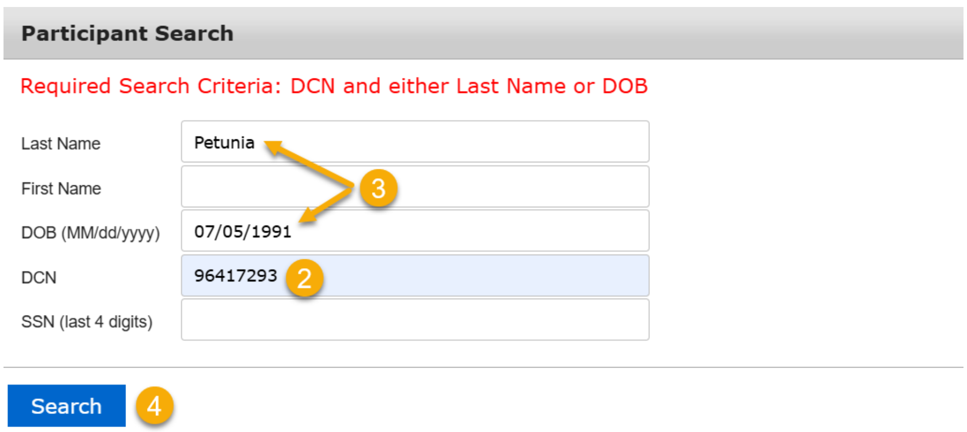
Step 1: From the home screen dashboard, click on **Participant Search**.



Step 2: Enter the **DCN** of the participant. *Note: This field is required.*

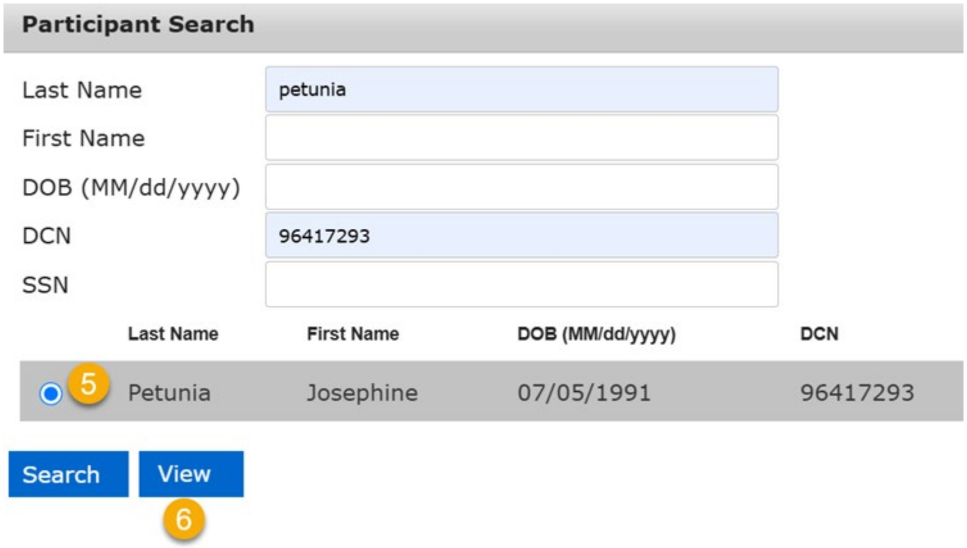
Step 3: Enter *either* a minimum of the first two characters participant's **Last Name**, or **DOB**. *Note: One or the other is needed to search for the participant.*

Step 4: Click **Search**.



Step 5: Click on the button to select the participant.

Step 6: Click on **View**.

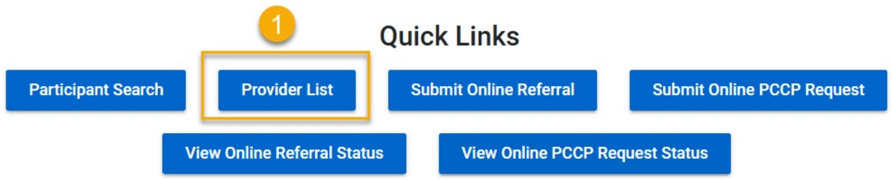


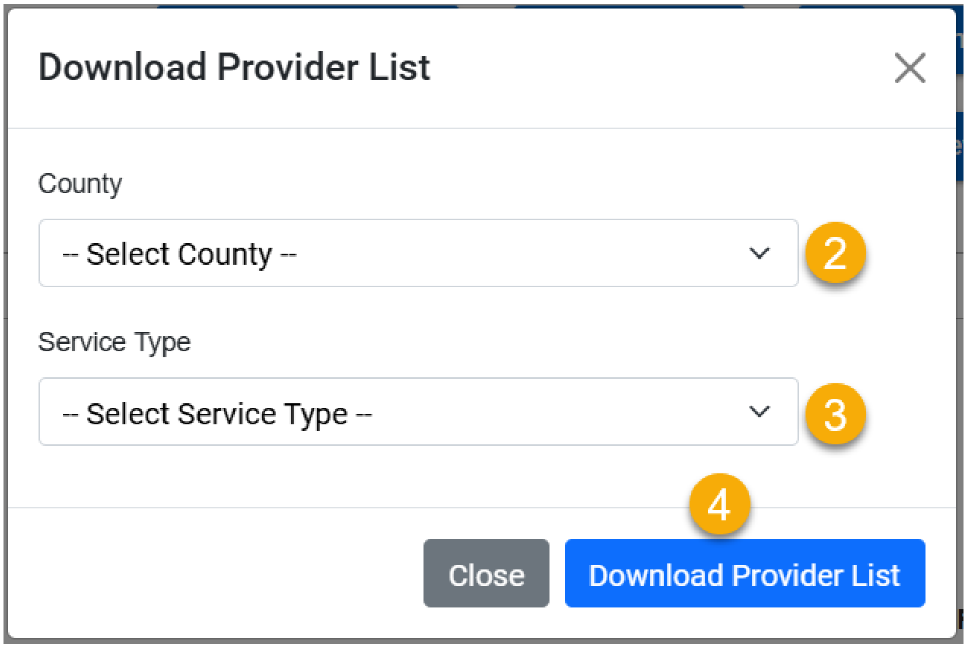
2.2 Provider List

The home dashboard allows you to download a list of providers filtered by county and service.

❖ To download a provider list:

Step 7: From the home screen dashboard, click on the **Provider List**.



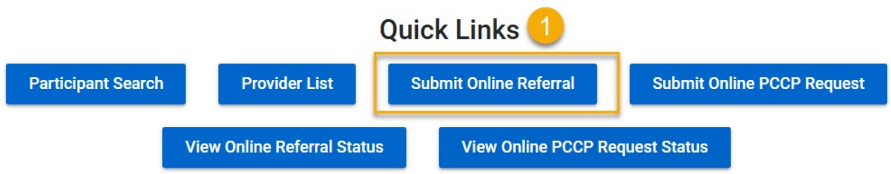


2.3 Submit Online Referral

The home dashboard provides a link to the public online referral form.

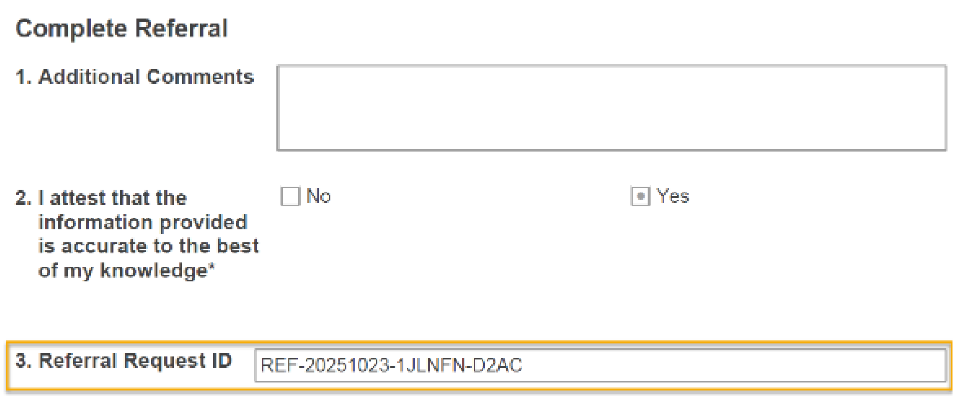
❖ **To submit an online referral:**

Step 1: From the home screen dashboard, click on **Submit Online Referral.**



Step 2: After submitting the form, a **Referral Request ID** is displayed on screen. You may note this number to check the status later, or select **Download PDF** to save or print a PDF copy that includes the same referral request ID at the bottom of the PDF.

Bottom of PDF:

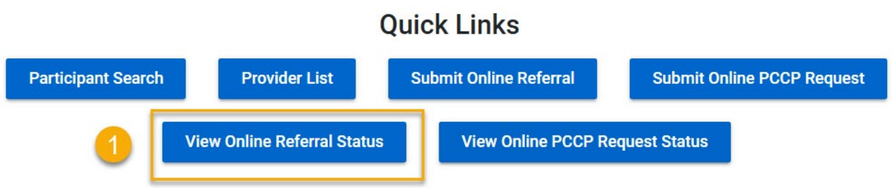


2.4 VIEW ONLINE REFERRAL STATUS

The home dashboard provides a link to view the status of a referral.

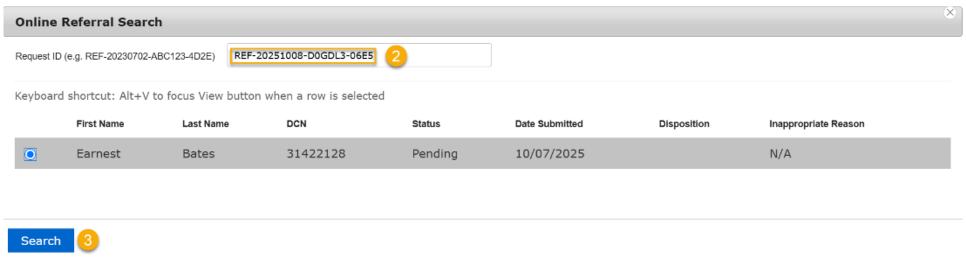
❖ **To view the status of an online referral:**

Step 1: From the home screen dashboard, click on **View Online Referral Status.**



Step 2: Enter the **Request ID** for the referral.

Step 3: Click **Search**. If a match is found, the participant information will be displayed along with the status of the referral.

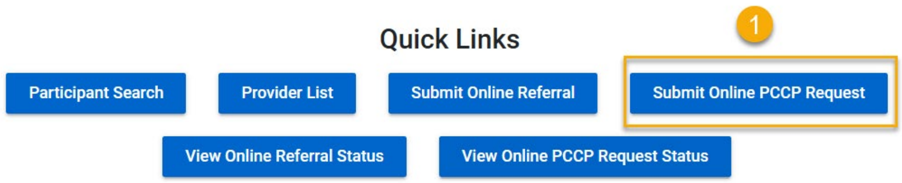


2.5 Submit Online PCCP Request

The home dashboard provides a link to the public online PCCP Request form.

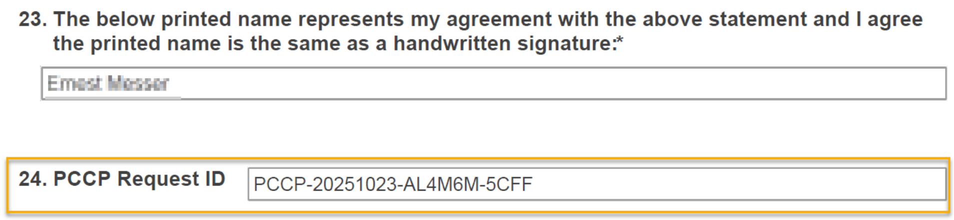
❖ **To submit an Online PCCP Request:**

Step 1: From the home screen dashboard, click on **Submit Online PCCP Request.**



Step 2: After submitting the form, a **PCCP Request ID** is displayed on screen. You may note this number to check the status later, or select **Download PDF** to save or print a PDF copy that includes the same PCCP request ID at the bottom of the PDF.

<u>Bottom of PDF</u>:

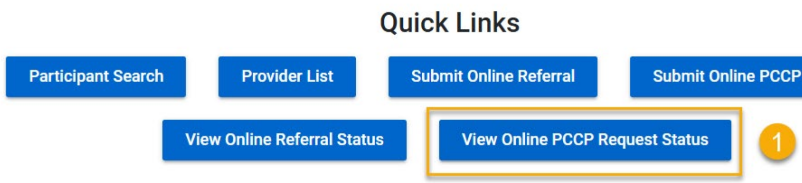


2.6 View Online PCCP Request Status

The home dashboard provides a link to view the status of an online PCCP Request.

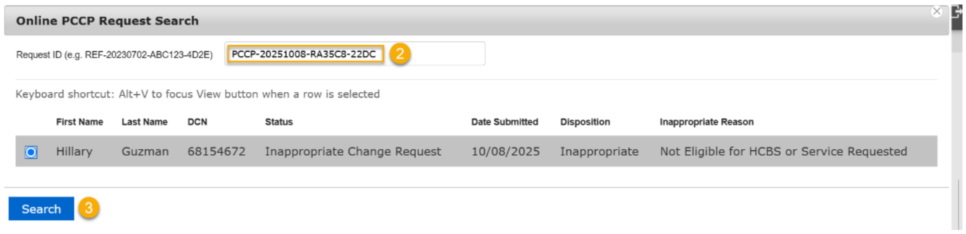
❖ To view the status of an online PCCP Request

Step 1: From the home screen dashboard, click on **View Online PCCP Request Status.**:



Step 2: Enter the **Request ID** for the Online PCCP Request.

Step 3: Click **Search**. If a match is found, the participant information will be displayed along with the status of the PCCP Request.



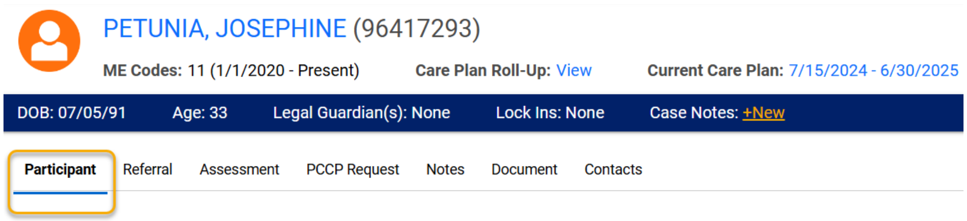
3 Participant Dashboard

About this Section	This section describes how to view information about a participant.

3.1 Participant Profile

❖ **To view a participant profile:**

Step 1: Navigate to **Home** > **Participant Search** and select the participant. The screen defaults to the **Participant** profile tab within the Participant dashboard.



Step 2: Make any changes or additions to the data where fields are accessible. The following sections/fields allow for edits:

a. General Information
- COOP Priority (Select from dropdown)

b. Demographic Info
- Region (Select from dropdown)
- County (Select from dropdown)
- Language Preference (Select from dropdown)
- Marital Status /Living Arrangements (Select from dropdown)
- Gender (Select from dropdown)
- Preferred Pronouns (Select from dropdown)
- Ethnicity (Select from dropdown)
- Race (Select from dropdown)

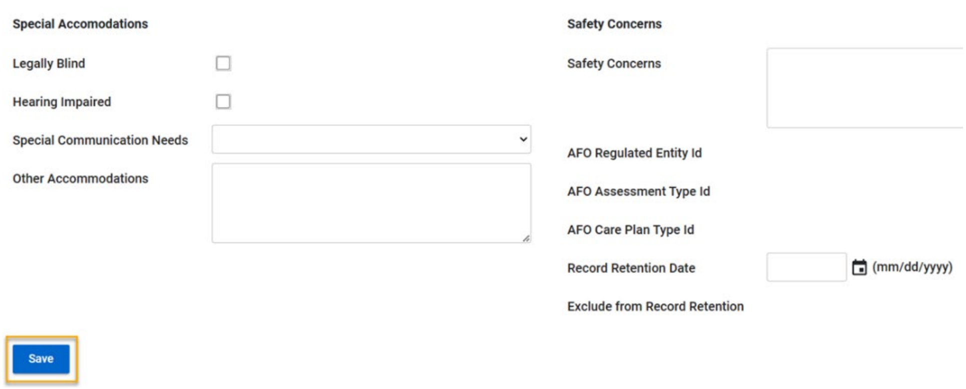
c. Contact Information (DSDS Participant Info)

- Email Address (Enter email address)
- DSDS Phone (Enter phone number)
- Best Time to Call (Enter text)
- Mailing Address
- Physical Address (For Assessments)
- Address Notes (Enter any other notes)

d. Safety and Special Accommodations

- Legally Blind (Checkbox)
- Hearing Impaired (Checkbox)
- Special Communication Needs (Select from dropdown)
- Other Accommodations (Enter text)
- Safety Concerns (Enter text)
- Record Retention Date (Enter Date)

Step 3: After making any changes or additions, click **Save**



3.2 STATUS CHECKS

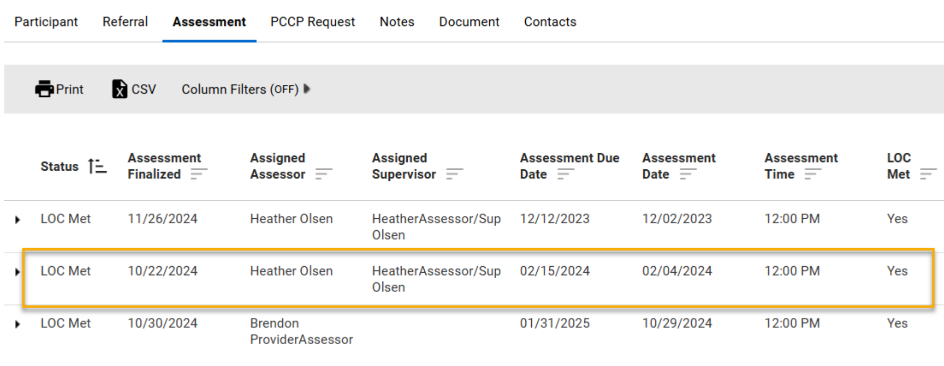
The participant dashboard features multiple tabs, each displaying the status of different participant aspects..

3.2.1 Check the Status of an Assessment

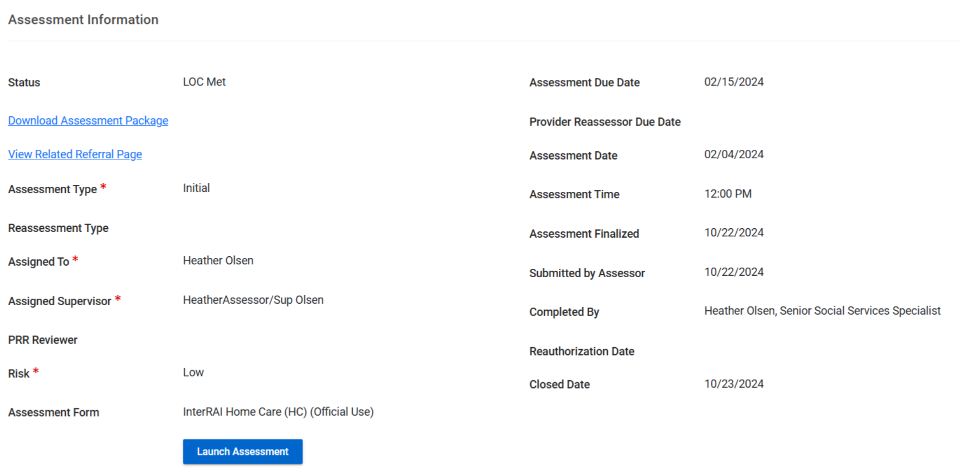
❖ To check the status of an assessment:

Step 1: Navigate to the Participant record and click the **Assessment** tab:

Step 2: Select the assessment you want to review:



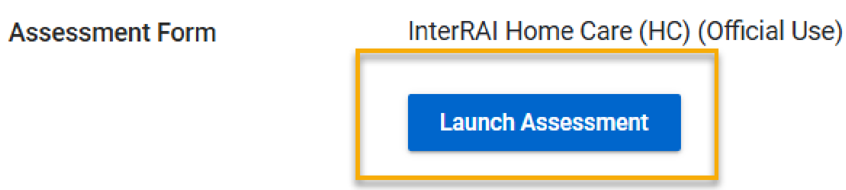
Step 3: The system displays the assessment details:



Assessment Information

Status	LOC Met	Assessment Due Date	02/15/2024
Download Assessment Package		Provider Reassessor Due Date	
View Related Referral Page		Assessment Date	02/04/2024
Assessment Type *	Initial	Assessment Time	12:00 PM
Reassessment Type		Assessment Finalized	10/22/2024
Assigned To *	Heather Olsen	Submitted by Assessor	10/22/2024
Assigned Supervisor *	HeatherAssessor/Sup Olsen	Completed By	Heather Olsen, Senior Social Services Specialist
PRR Reviewer		Reauthorization Date	
Risk *	Low	Closed Date	10/23/2024
Assessment Form	InterRAI Home Care (HC) (Official Use)		
	Launch Assessment		

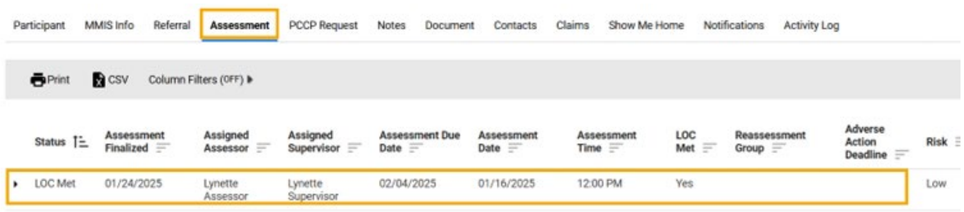
Step 4: To view the completed InterRAI assessment form, click the **Launch Assessment** button:



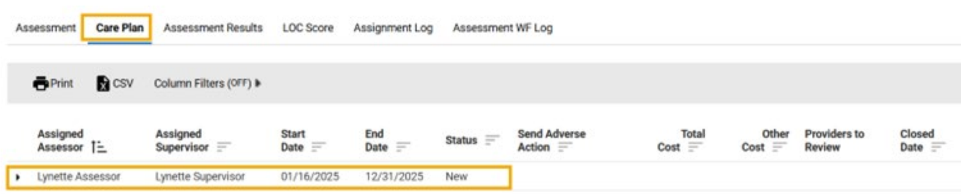
3.2.2 Check the Status of a Care Plan

❖ **To check the status of a care plan:**

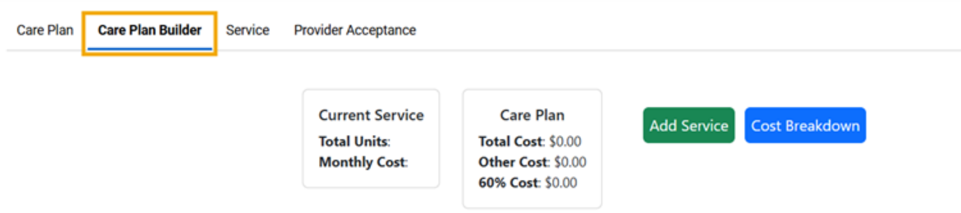
Step 1: Navigate to the **Participant >Assessment** tab and select an assessment



Step 2: Click on the **Care Plan** tab and select the care plan:



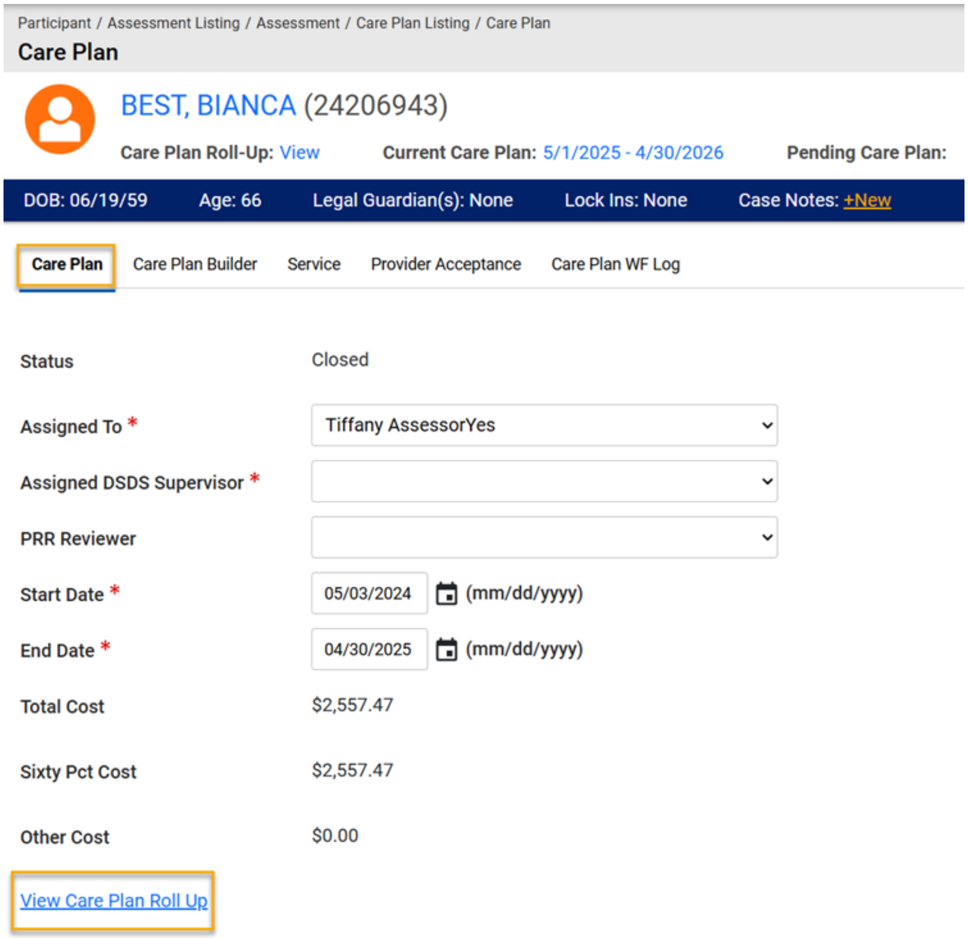
Step 3: Click on the **Care Plan Builder** tab



Note: The Care Plan Builder Tab is not available if the care plan is in any of the following statuses: *Appealed, Approved, Authorized, Closed,* or *Hold*, and the following message will display:

The Care Plan Builder Screen is disabled.

To view and/or export (and not edit) details of the Care Plan, return to the **Care Plan** tab and Select the link to **View Care Plan Roll-Up**:



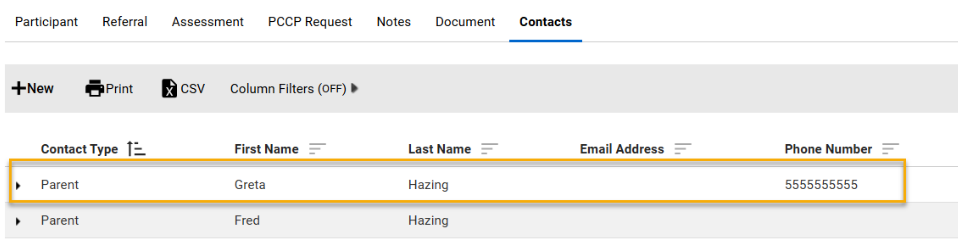
Participant / Assessment Listing / Assessment / Care Plan Listing / Care Plan
Care Plan
BEST, BIANCA (24206943)
Care Plan Roll-Up: View
Current Care Plan: 5/1/2025 - 4/30/2026
Pending Care Plan:
DOB: 06/19/59
Age: 66
Legal Guardian(s): None
Lock Ins: None
Case Notes: +New
Care Plan
Care Plan Builder
Service
Provider Acceptance
Care Plan WF Log
Status
Closed
Assigned To *
Tiffany AssessorYes
Assigned DSDS Supervisor *
PRR Reviewer
Start Date *
05/03/2024
(mm/dd/yyyy)
End Date *
04/30/2025
(mm/dd/yyyy)
Total Cost
$2,557.47
Sixty Pct Cost
$2,557.47
Other Cost
$0.00
View Care Plan Roll Up

3.2.3 Review / Add Contacts

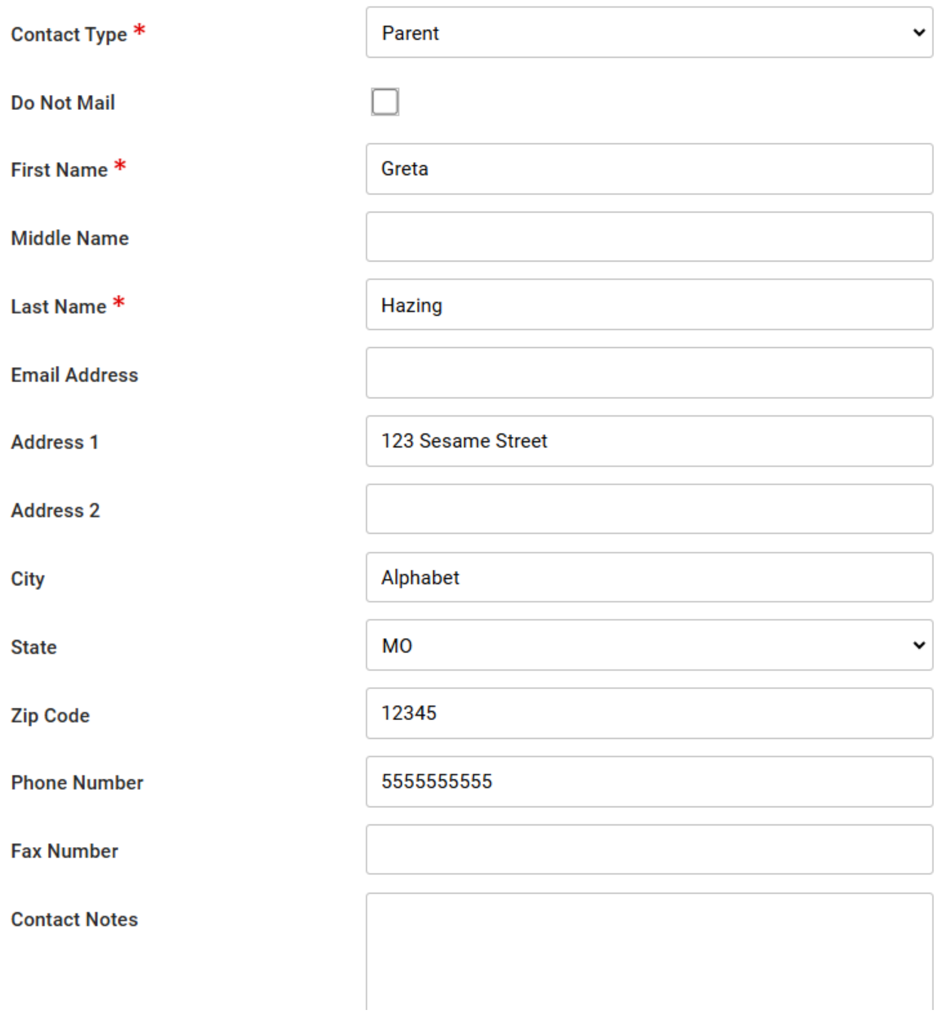
❖ To review contacts:

Step 1: Navigate to the Participant record and click on the **Contacts** tab.

Step 2: Select the contact you want to review:



Step 3: The system displays contact details:



Contact Type *	Parent
Do Not Mail	☐
First Name *	Greta
Middle Name	
Last Name *	Hazing
Email Address	
Address 1	123 Sesame Street
Address 2	
City	Alphabet
State	MO
Zip Code	12345
Phone Number	5555555555
Fax Number	
Contact Notes	

❖ To Add Contact:

Step 1: Navigate to the Participant record and click on the **Contacts** tab

Step 2: Click **+New**

Step 3: Fill in the required fields and click the **Save** button.

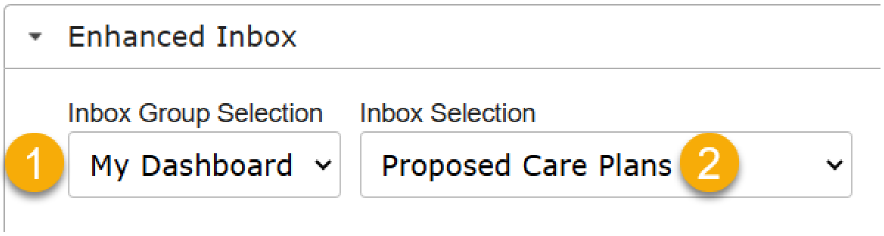
4 Provider Acceptance Review

ABOUT THIS SECTION	This section describes how to review care plans and approve or deny them.

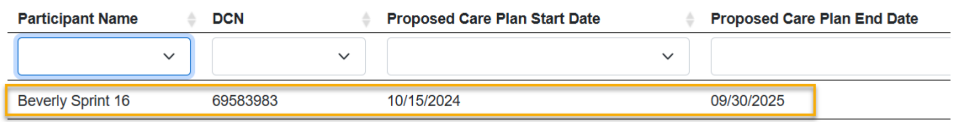
4.1 Review Proposed Care Plan

❖ **To review a proposed care plan:**

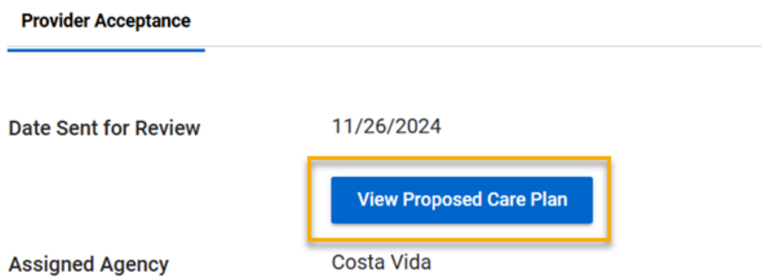
Step 1: From the home dashboard, select the **My Dashboard > Proposed Care Plans** queue.



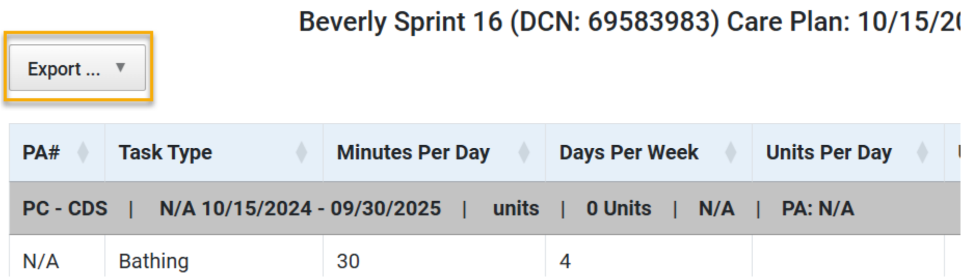
Step 2: Locate the Participant you wish to review in the list and click on the corresponding row for that Participant.



Step 3: The **Provider Acceptance** screen launches. Click on **View Proposed Care Plan**.



Step 4: Review the Care Plan details. Click on **Export** to download a **PDF**, **Print**, or download as an **Excel** file.



4.2 Accept Proposed Care Plan

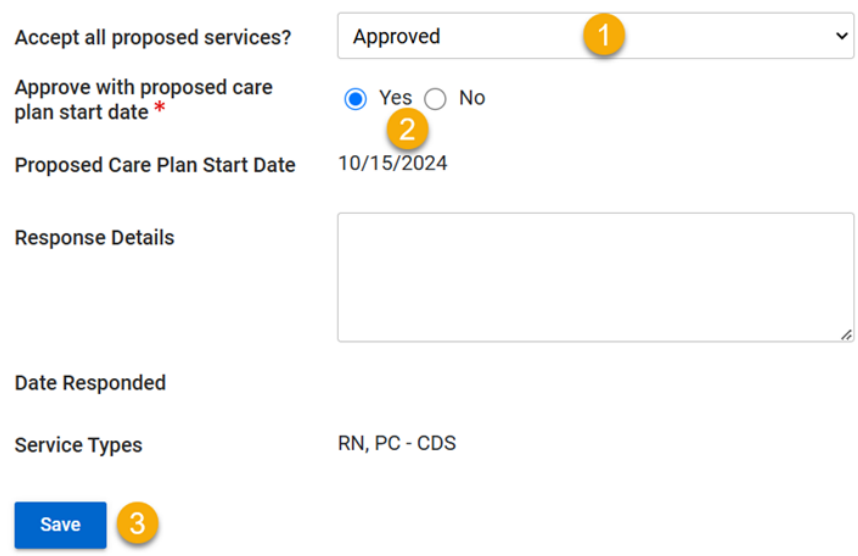
❖ **To accept a proposed care Plan:**

Step 1: From the **Provider Acceptance** screen, click on the **Accept all proposed services?** dropdown and select **Approved**.

Step 2: Select **Yes** to **Approve with proposed care plan start date**.

Note: If you select "No" in the "Approve with proposed care plan start date field, this will indicate to DSDS that you accept the service plan, but not the start date of the services. The system will treat this as a denial and route to DSDS for review.

Step 3: Click on the **Save** button



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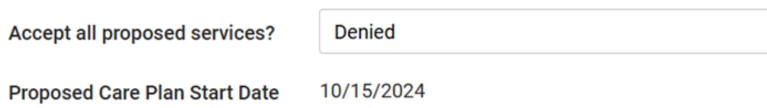
4.3 Deny Proposed Care Plan

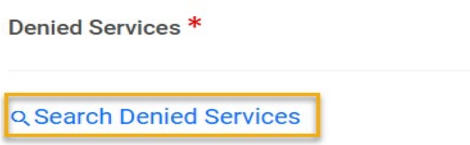
❖ To deny a proposed care plan:

Step 1: From the **Provider Acceptance** screen, select the **Denied** option from the **Accept all proposed services?** field:



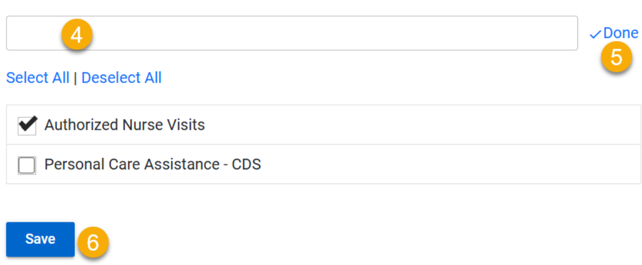
Step 2: Select an option from the **Primary Denial Reason** field:

Step 3: Click on **Search Denied Services**.



Step 4: The system displays a list of services assigned to your agency. Select one or more services to deny and click the **Done** button.

Step 5: Click the **Save** button.



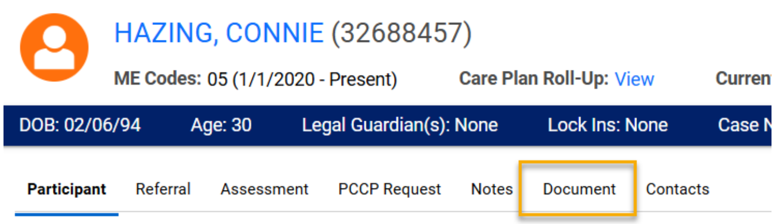
5 Documents

ABOUT THIS SECTION	This section describes how to access existing and create new documents

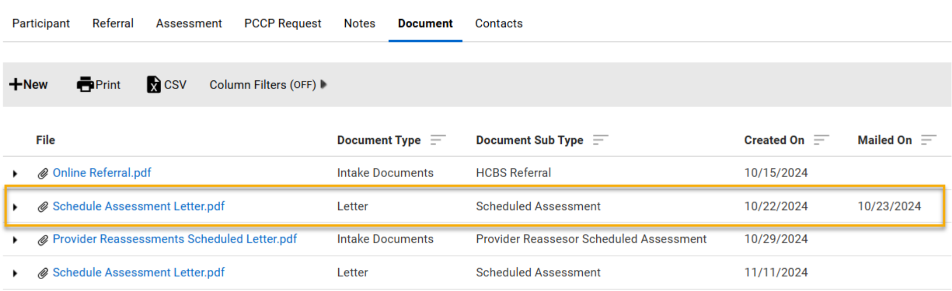
5.1 View Documents

❖ To view documents:

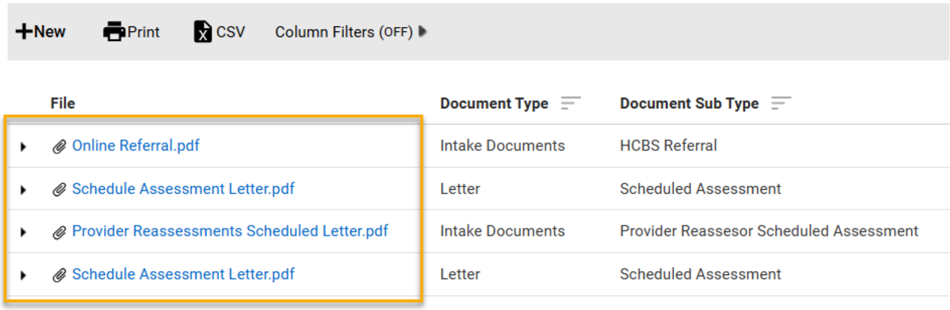
Step 1: From the Participant record, click the **Document** tab.



Step 2: Click the document record you want to review:



Step 3: You can also click on the document attachment link to directly download the document attachment from the listing screen:



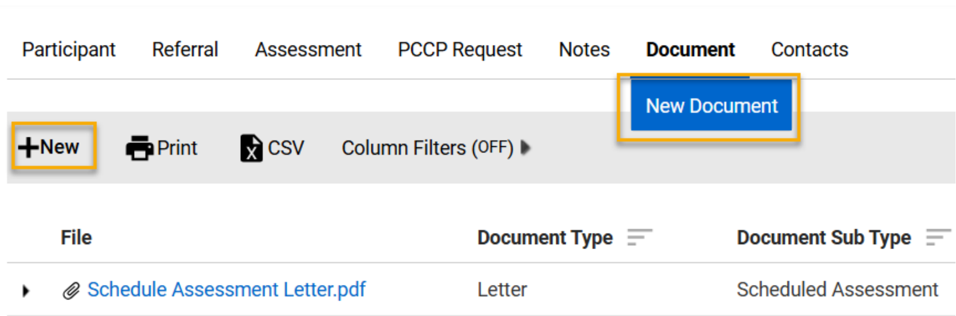
+New Print CSV Column Filters (OFF)

File	Document Type	Document Sub Type
Online Referral.pdf	Intake Documents	HCBS Referral
Schedule Assessment Letter.pdf	Letter	Scheduled Assessment
Provider Reassessments Scheduled Letter.pdf	Intake Documents	Provider Reassesor Scheduled Assessment
Schedule Assessment Letter.pdf	Letter	Scheduled Assessment

5.2 Add a New Document

❖ To add a new document:

Step 1: From Participant record, click the **Document** tab and then click the **+New** button. Alternatively, hover over the **Document** tab and click **New Document**.

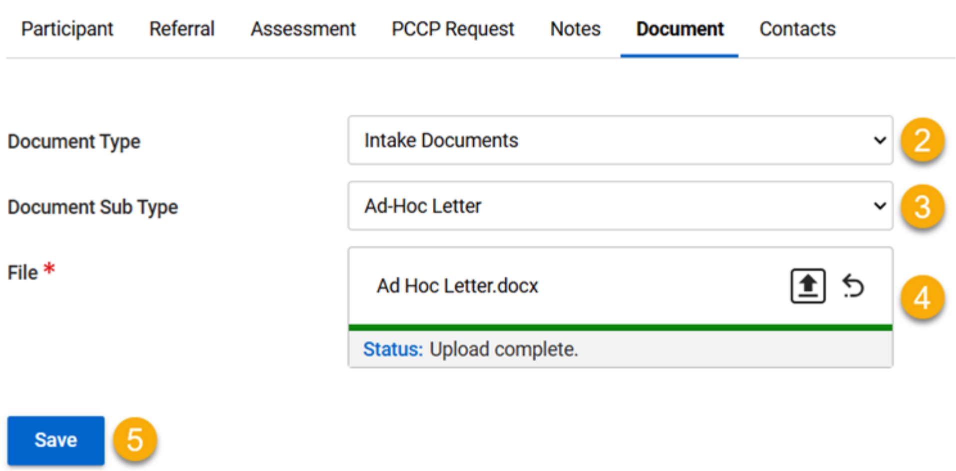


Step 2: Select a **Document Type** from the dropdown menu.

Step 3: Select a Document **Sub Type** from the dropdown menu.

Step 4: Click the file upload icon to select and upload the document. A **Status** of "Upload complete" will confirm the file upload.

Step 5: Click **Save**.



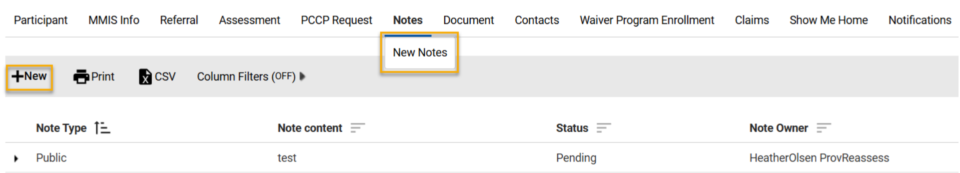
6 Case Notes

ABOUT THIS SECTION	This section describes how to access and add case notes.

6.1 ADDING CASE NOTES

❖ To add a Case Note:

Step 1: Navigate to the **Participant > Notes** tab. Click the **+New** icon or hover over Notes to highlight and click **New Note**.

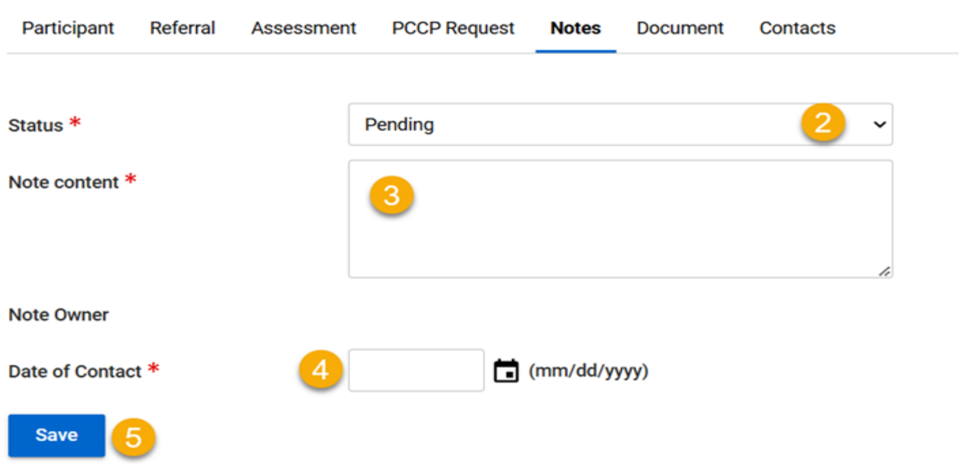


Step 2: Select a **Status** from the dropdown menu.

Step 3: **Note Content** allows for free type text.

Step 4: Enter the **Date of Contact**.

Step 5: Click **Save**.



7 Provider Reassessments

About this Section	This section describes how to process assessments.

7.1 Navigating to Assessments

There are various ways to navigate to a pending assessment.

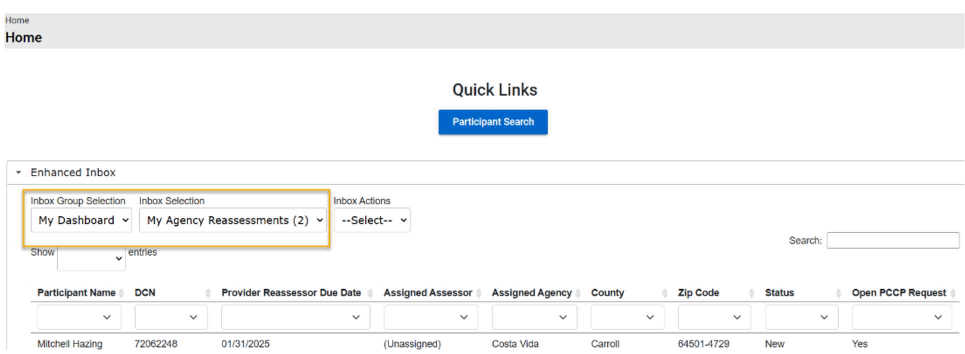
7.1.1 Navigating to My Agency's Reassessments Queue

Reassessments assigned to your agency will appear here.

❖ **To navigate to your agency's reassessments:**

Step 1: From the home screen dashboard, navigate to **My Dashboard** and select **My Agency Reassessments** from the dropdown.

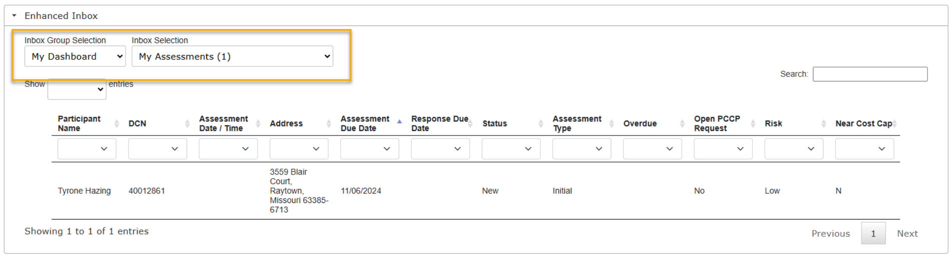
Note that there are filters under each column in the queue to view a group of intended assessments for a specific assessor, for example.



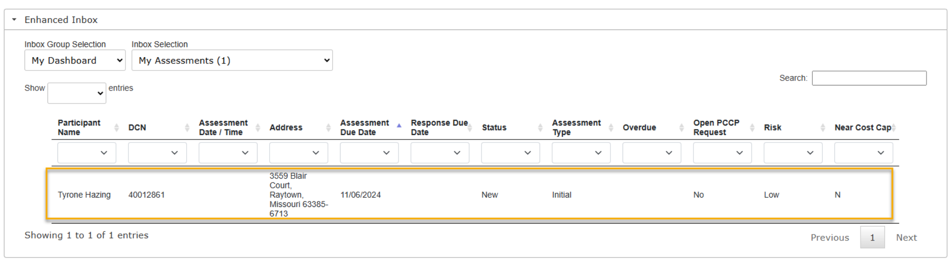
7.1.2 Navigating to My Reassessments Queue

❖ To navigate to your reassessments:

Step 1: From the home screen dashboard, navigate to the **My Dashboard > My Ressessments** queue:



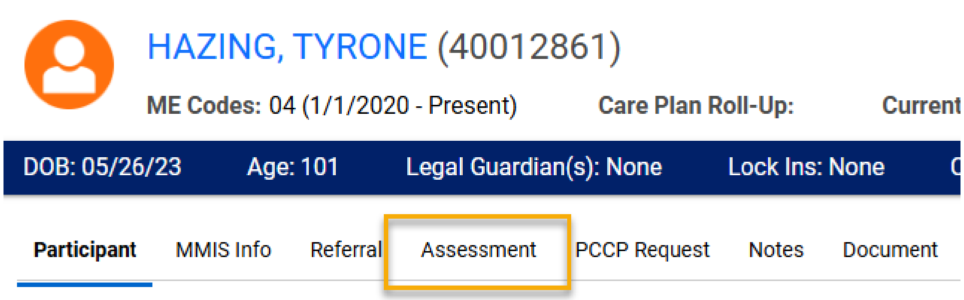
Step 2: Click the assessment record in the queue:



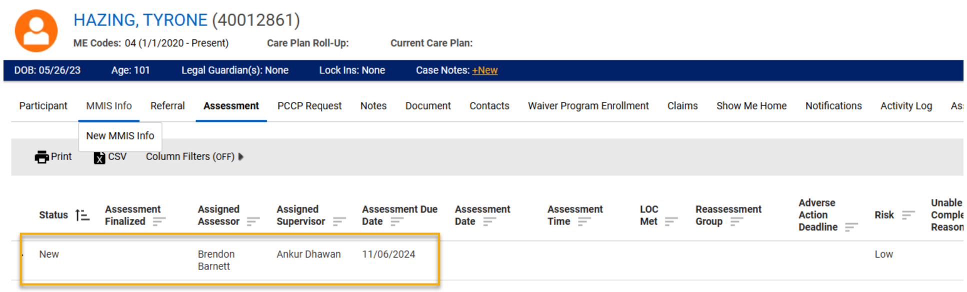
7.1.3 Navigating to an Assessment from a participant record

❖ To navigate to an assessment from a participant record:

Step 1: Click the **Assessment** tab from the participant navigation bar:



Step 2: Click the related **assessment record** you want to view:



7.2 Assign an Assessment

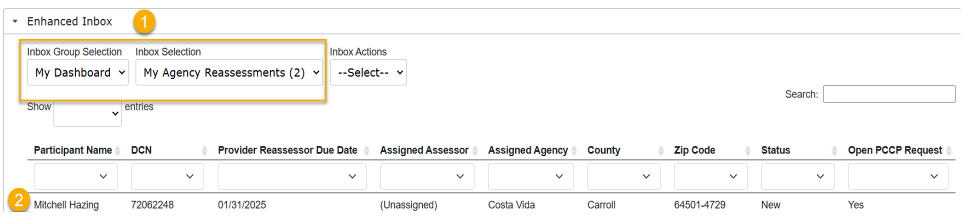
Assessments can be individually assigned to a specific assessor, or multiple assessments can be assigned to an assessor using the bulk assign option.

7.2.1 Assign Individual Assessment

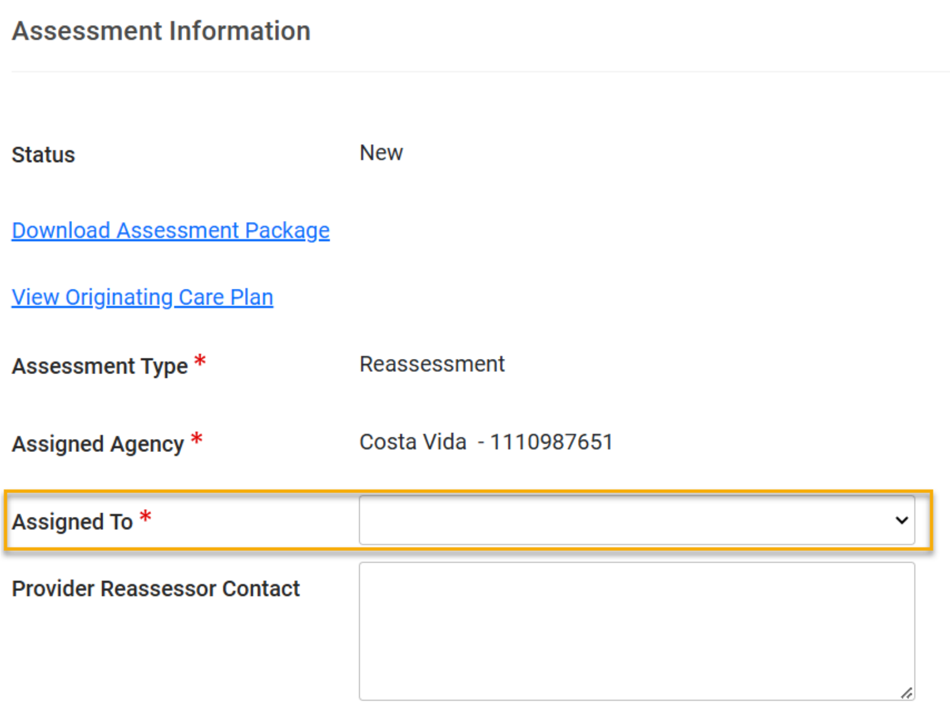
❖ **To individually assign an assessment:**

Step 1: Navigate to **My Dashboard>My Agency Reassessments.**

Step 2: Click on the desired row to select the participant.



Step 3: The Assessment screen launches. Select an assessor from the **Assigned To** dropdown menu.



Step 4: Click **Save**.

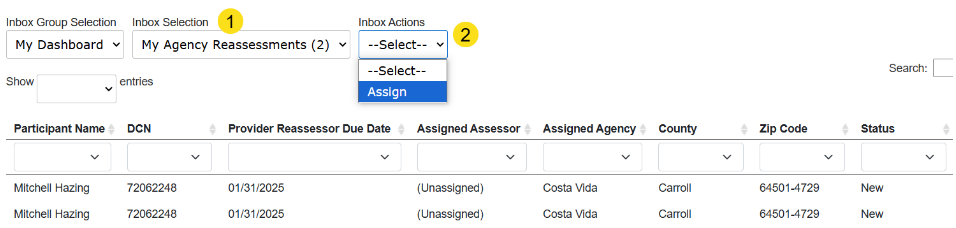
7.2.2 Bulk Assignments

When there are multiple assessments that need to be assigned to one or more assessors, they can be assigned in bulk rather than individually.

❖ **To Bulk assign multiple assessments to a specific assessor:**

Step 1: Navigate to **My Dashboard>My Agency Reassessments.**.

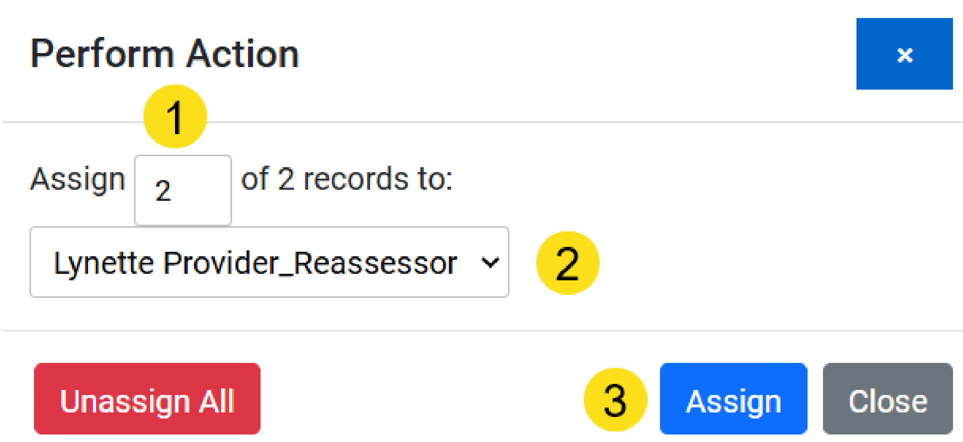
Step 2: Click on the Inbox Actions dropdown to select **Assign**



Step 3: Within the Perform Action window, accept the default or change the number of records to assign.

Step 4: Select the assessor from the dropdown.

Step 5: Click the **Assign** button.



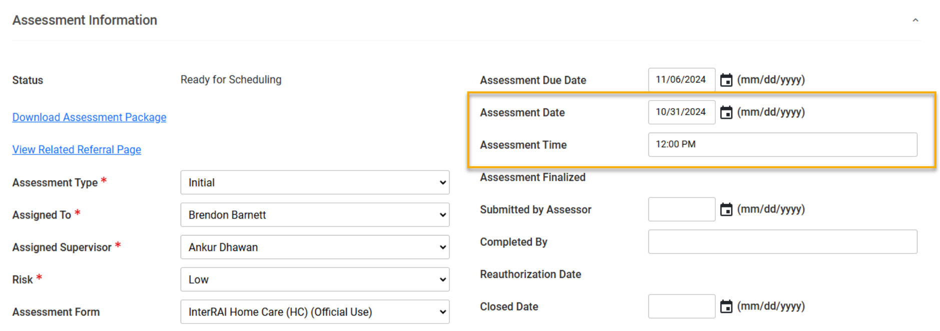
7.3 SCHEDULE AN ASSESSMENT

Once a participant has agreed to have an assessment, you can schedule the assessment in FUSION.

- **To schedule an assessment:**

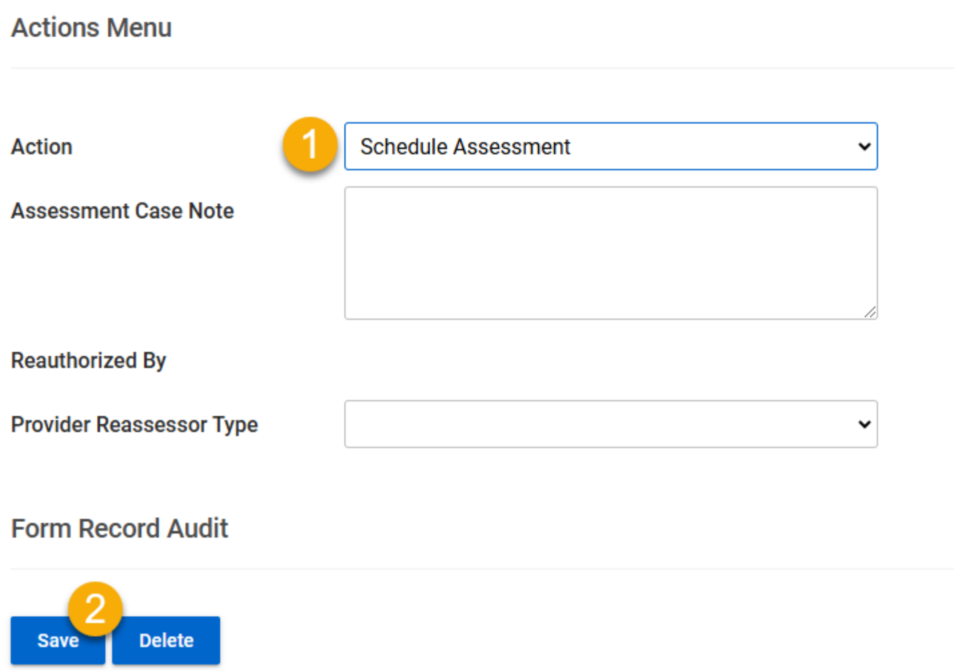
Step 1: Navigate to the **Assessment Information** section of the assessment screen.

Step 2: Select the **Assessment Date** and **Assessment Time** for the scheduled assessment:



Step 3: Navigate to the **Actions Menu** section of the assessment screen.

Step 4: From the **Action** field, select the **Schedule Assessment** option and click the **Save** button:



The system updates the assessment to the “Scheduled” status and generates a scheduled assessment letter on the participant’s documents.

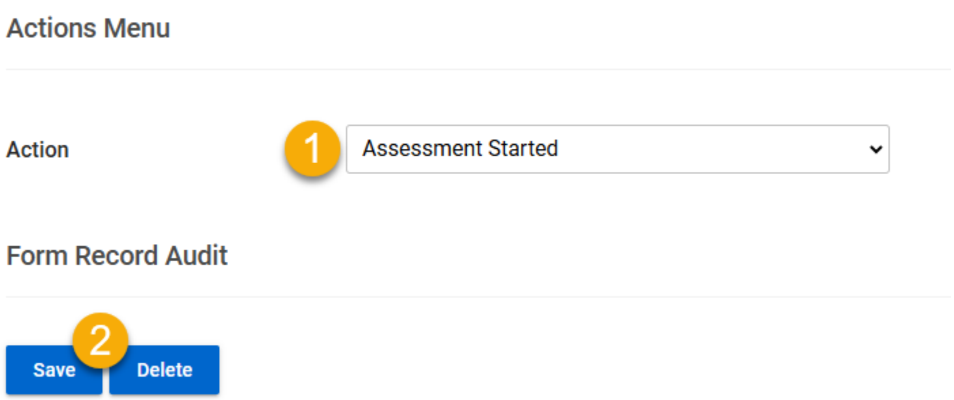
7.4 Conduct an Assessment

Once an assessment is scheduled, you can conduct the assessment and capture the assessment results in FUSION.

❖ To conduct an assessment:

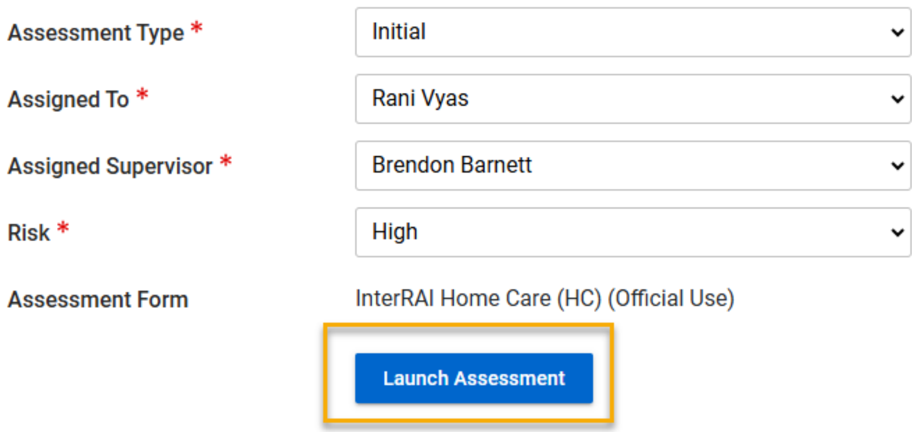
Step 1: Navigate to the **Actions Menu** section of the assessment screen.

Step 2: From the **Action** menu, select the **Assessment Started** option and click the **Save** button:



The system will update the assessment to the "In Progress" status and make the InterRAI assessment form available.

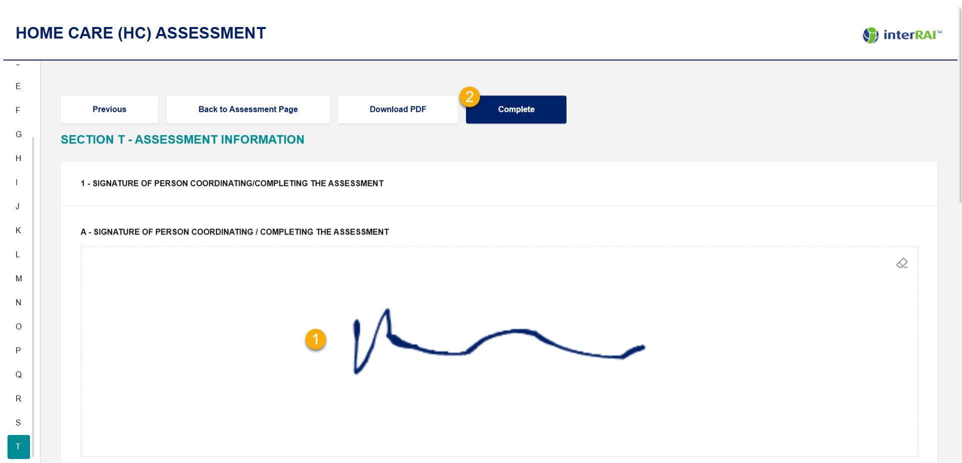
Step 3: Navigate to the **Assessment Information** section of the assessment screen and click the **Launch Assessment** button:



The system will launch the InterRAI assessment form.

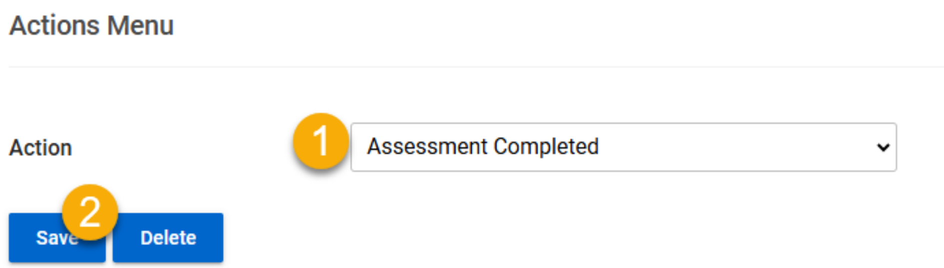
Step 4: Complete the InterRAI assessment form.

Step 5: In **Section T** of the form, add your **signature** and click the **Complete** button:

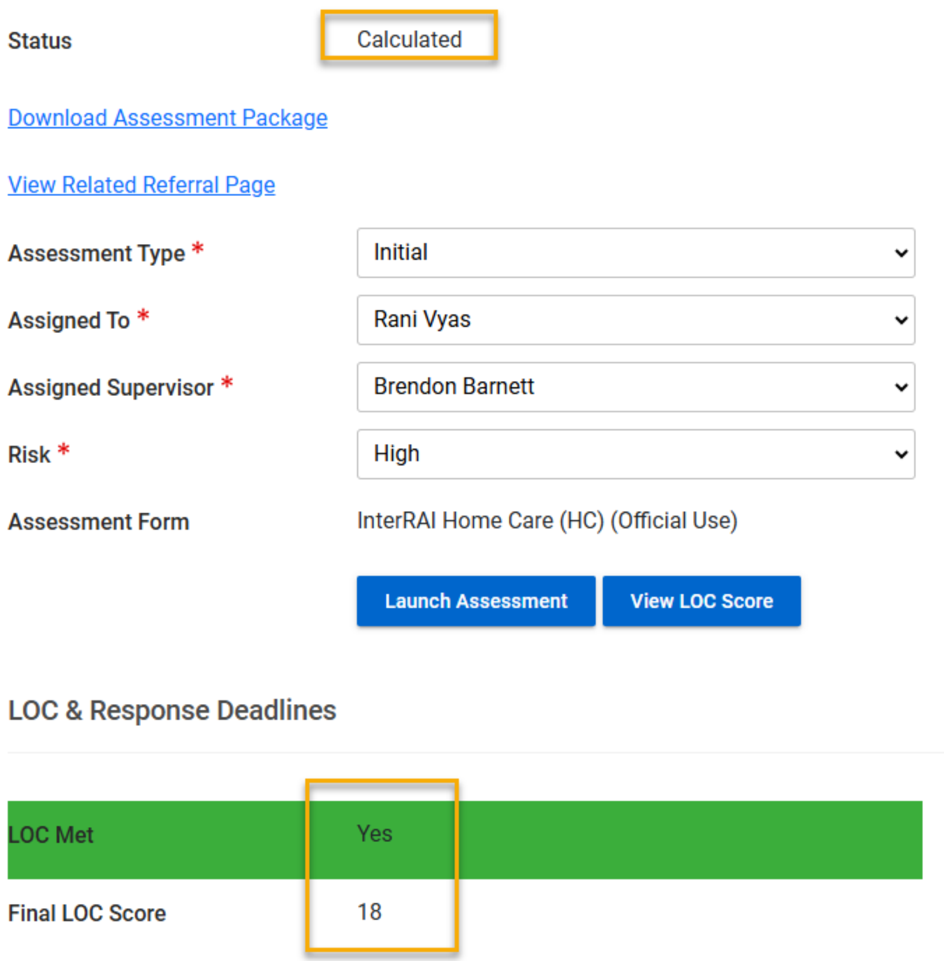


The system will navigate the user back to the FUSION assessment screen.

Step 6: In the **Actions Menu** section of the assessment screen, in the **Action** field, select the **Assessment Completed** option and click the **Save** button:



The system will update the assessment to the "Calculated" status and calculate the Level of Care (LOC) score:

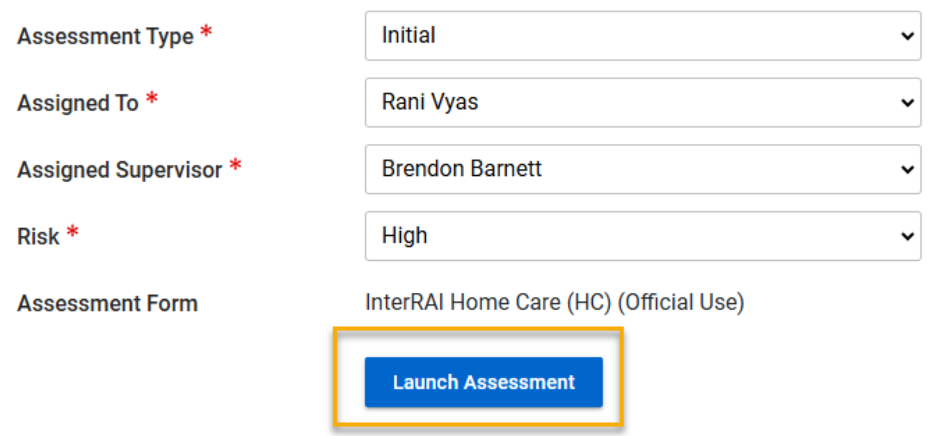


7.5 Recalculate an Assessment

If you need to update the InterRAI assessment form and recalculate the Level of Care (LOC) score, you can recalculate the assessment.

❖ **To recalculate an assessment:**

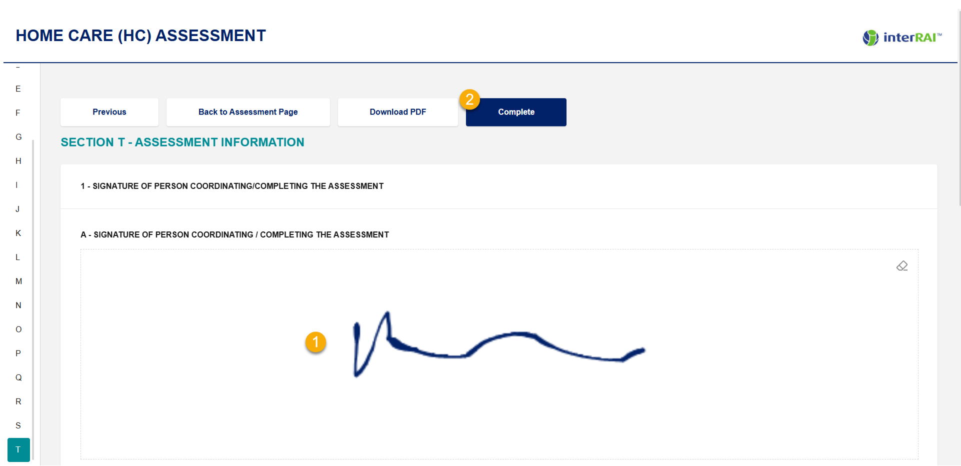
Step 1: Navigate to the **Assessment Information** section of the assessment screen and click the **Launch Assessment** button:



The system will launch the InterRAI assessment form.

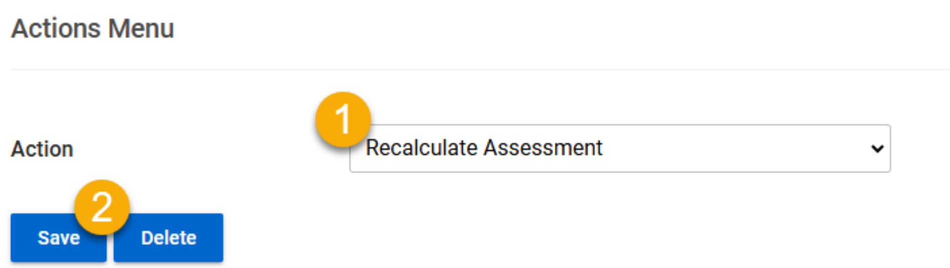
Step 2: Update the InterRAI assessment form.

Step 3: In **Section T** of the form click the **Complete** button:



The system will navigate the user back to the FUSION assessment screen.

Step 4: In the **Actions Menu** section of the assessment screen, in the Action field, select the **Recalculate Assessment** option and click the **Save** button:



The system will recalculate the Level of Care (LOC) score.

7.6 Provider Reassessor Submits Assessment for LOC Not Met

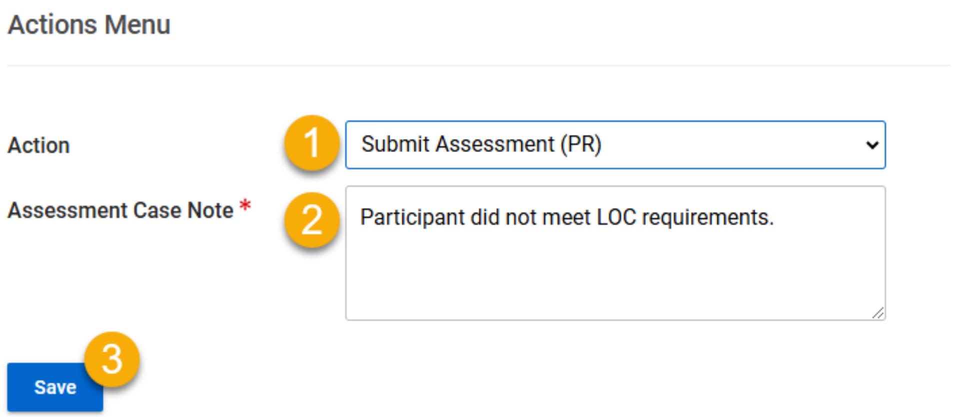
As a Provider Reassessor user, you can submit an assessment that does not meet Level of Care (LOC) for review by DSDS staff.

To submit an assessment:

Step 1: Navigate to the **Actions Menu** section of the assessment form. In the **Action** field, select the **Submit Assessment (PR)** option.

Step 2: Add an **Assessment Case Note** stating participant did not meet LOC requirements.

Step 3: Click the **Save** button.



The system will update the assessment to the "Provider Reassessment – LOC Not Met" status and is pending review by DSDS staff.

7.7 PROCESS ASSESSMENT AS UNABLE TO COMPLETE

If the provider reassessor is unable to complete the assessment

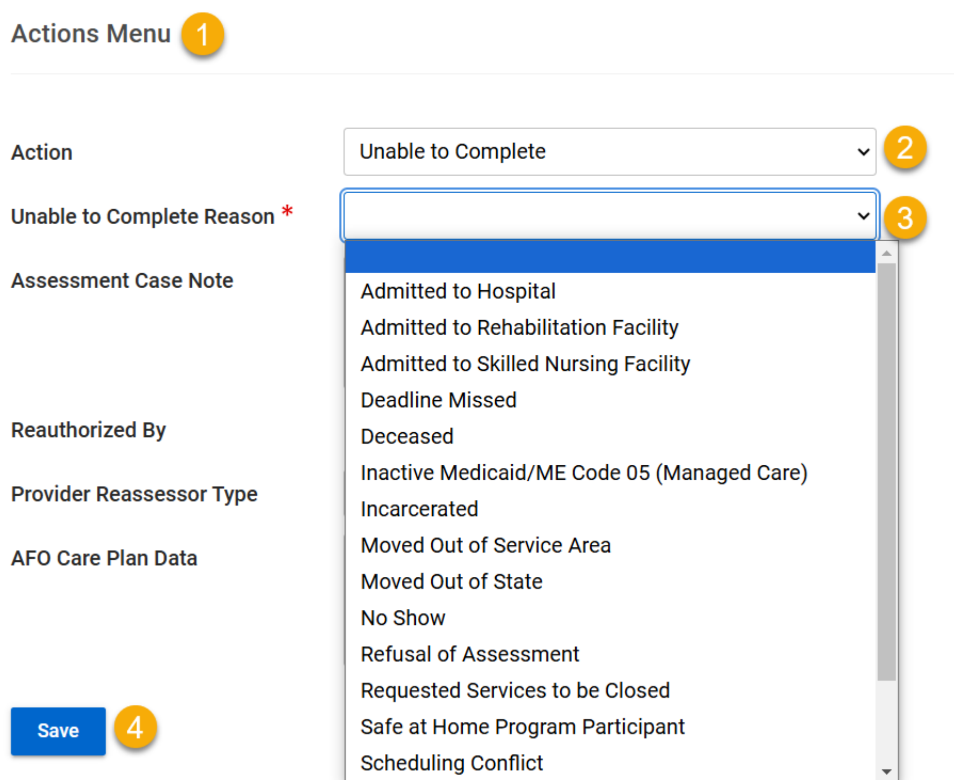
❖ **To process an assessment as Unable to complete:**

Step 1: Navigate to the **Actions Menu** section of the assessment screen.

Step 2: In the **Action** menu, select the **Unable to Complete** option from the dropdown.

Step 3: Select the **Unable to Complete Reason** from the dropdown that appears.

Step 4: Click **Save**.



At that time the system will notify PRR that the assessment is ready for further action on the DSDS side. The assessment will drop off the My Reassessments queue once the PRR team has finished processing.