

CareHub Navigation Guide

High-Level System Overview for Efficient Audit Navigation

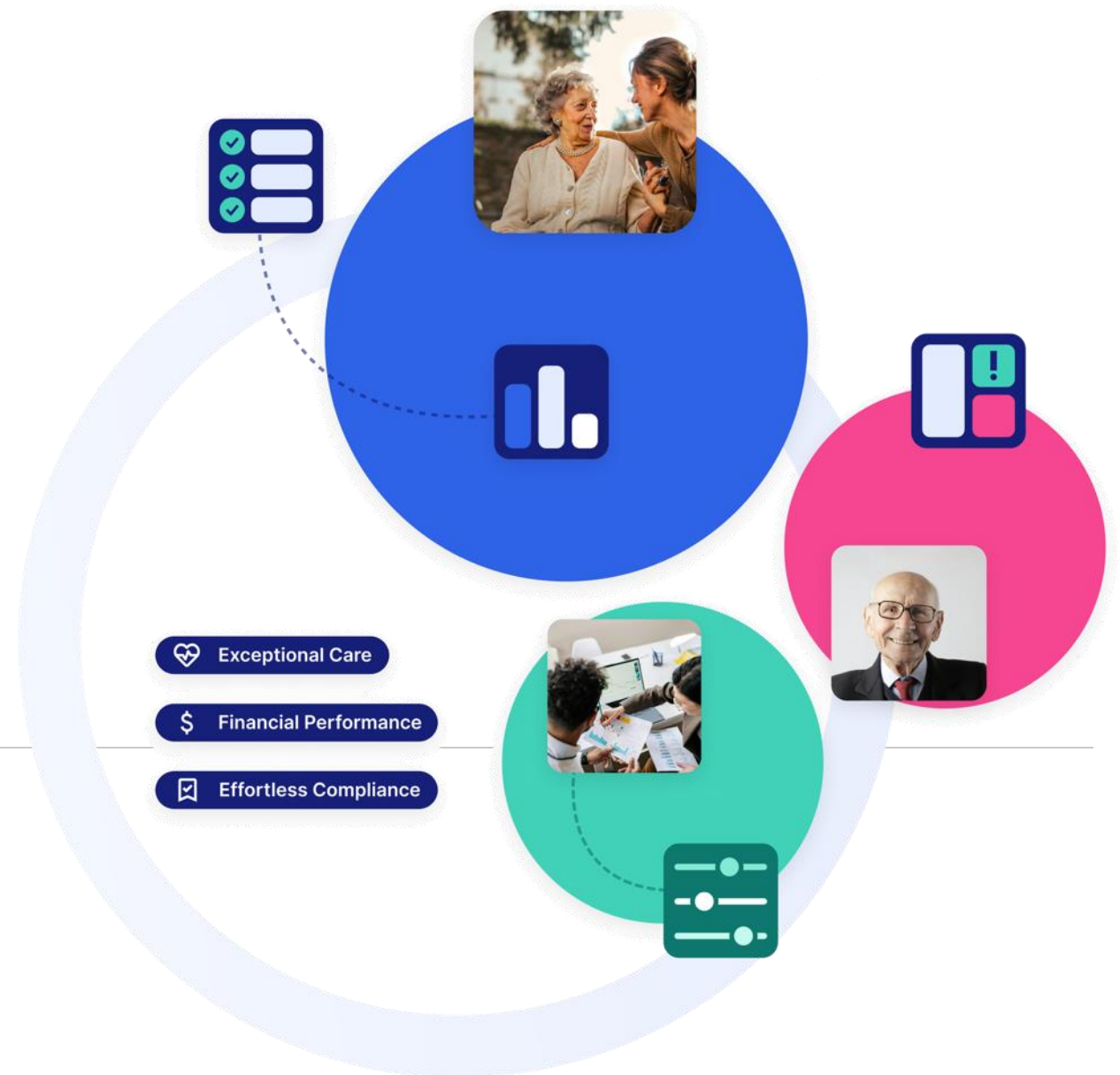




Table of Contents

● [Understanding CareHub Architecture](#) — Slide 3

● [Navigation Essentials](#) — Slide 4

● [Modules Overview](#) — Slide 5

● [Enrollment](#) — Slide 6

● [Participant Profile](#) — Slide 7

● [Assessments and Care Plan](#) — Slide 8

● [Quality Inbox](#) — Slide 9

● [Clinical EMR](#) — Slide 10

● [Reports](#) — Slide 11

Understanding CareHub Architecture

Core modules

CareHub System: Operational platform managing enrollment, scheduling, assessments, care plans, SDAGs, services, medication administration, and reporting across interdisciplinary teams

Integrated EMR system

Clinical system accessible via "Go to EMR" button, handling visit notes, ePrescribing, and complete medical records

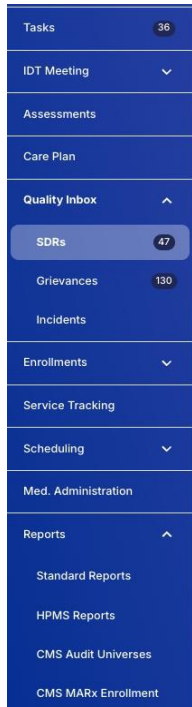
Users switch between systems using "Go to EMR" link while maintaining context, with automatic data synchronization

Real time data sync

Information resides in either CareHub modules or Elation clinical records depending on function

Navigation Essentials

Modules



- Static left-side navigation of modules

Centers & Teams



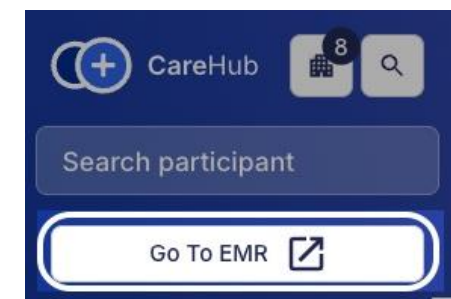
- Filter by Center and/or IDT Team

Participant search



- Search participant by name or member ID

Link to Clinical EMR



- Direct link from participant profile to patient chart

Modules Overview

Tasks	36	Filters by category, priority, status, due date, created by, and assigned to.
IDT Meeting	▼	Huddle (agenda) and tasks by team.
Assessments		Filter by Participant, Type, Status, and Due Date
Care Plan		Queue of upcoming, filter by Participant, Category, Status, and Due Date. Select on left to open on right.
Quality Inbox	^	
SDRs	47	SDRs, Grievances, and Incidents. Each has its own dashboard with filters for status or type and dates.
Grievances	130	
Incidents		

Enrollments	^	
Enrollments		manage Enrollment and Disenrollment records. Filter by status or referral date.
Disenrollments		
Service Tracking		Services (Orders/Referrals, Unplanned, Other) and Auths
Scheduling	▼	Center Calendar Use Views & Filters
Med. Administration		List view to link to Participant med list and MAR
Reports	^	
Standard Reports		Standard, HPMS, CMS Universe, and CMS MARx Enrollment Reports . Date and field filters and Export options.
HPMS Reports		
CMS Audit Universes		
CMS MARx Enrollment		

Enrollment

Participant Enrollment & Disenrollment

Navigate to Enrollments module, filter by status,
search by name or ID

One Participant, Separate Records

- Enrollment follows 3-step process: Referral/Intake, Agreement, Confirmation
- Disenrollment: pending or confirmed
- Records hold all documentation separate from Participant Profile

Enrollment Record Status:

Status

☐ Open Pending
Intake

☐ Open Pending
Signature

☐ Open Pending
Enrollment Date

☐ Closed Enrolled

☐ Closed Not Enrolled

☐ Closed Denied

Disenrollment Record Status:

Status

Select None

Select All

☐ In Progress

☐ Disenrolled

☐ Canceled

Participant Profile

Select participant from search or module to open profile

- Participant-centric view with easy access to Assessments, Care Plans, Service Tracking, and SDAGs
- One click to access patient clinical chart "Open in EMR"

←

Participant Profile

Actions ▾

☑

Gladys Kravitz (10001448)

89 y/o • Female • Enrolled: 12/01/2025 • Day Center on Sun May 17 • EMR:Code Status: DNR/DNI

Open In EMR

Profile

Timeline

Tasks

Medications

Conditions

Care Plan

Quality

IDT Notes

Assessments

Service Tracking

Labs

Vitals

Calendar

Search

⌵

Filters

6

12/23/2025

○

Emergency Room Visit

12/23/2025

○

ER Visit and Inpatient Admission

12/23/2025

○

Inpatient Admission

12/01/2025

○

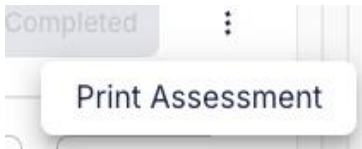
Enrollment
New - Closed Enrolled

Assessments and Care Plan



Assessments

- Navigate to Assessments module from left-side menu to view all assessments, or access participant-specific assessments from profile
- Comprehensive: this is the initial assessment
- Semi-Annual: every annual or bi-annual assessment post comprehensive/initial
- Standard: select of clinical assessments
- SDR: linked to service determination request
- Role-Based Views: Interface provides discipline-specific sections for providers, nurses, social workers, therapists, dietitians, and home care coordinators



Care Plan

- Active & Draft in Participant Profile
- Content checklist aligns with **42 CFR 460.106**
- *"Living, breathing document"* - ability to edit/add problems, outcomes, and interventions (patient-specific)
- Linked records available in interventions
- Past care plans and documents at bottom



Quality Inbox

SDRs, Grievances, and Incidents

Quality Inbox centralizes compliance activities across system-wide and participant-specific views with status and date filtering

Service Determination Requests

- Summary
- Request Information
- Submission Details
- IDT Meeting Details
- Link to SDR Assessment
- Decision Details
- Notification Details
- IDT sign-off
- Appeal details (if applicable)

Grievances

- Summary
- Grievance Information
- Submission Details
- Resolution Details
- Notification Details

Incidents

- Summary
- Supporting documentation
- tracks trends and assigns follow-up actions for QAPI escalation and HPMS reporting

Clinical EMR

Click "Go to EMR" button in CareHub dashboard header to open Elation home page, or use "Open in EMR" link from participant profile for direct chart access

- Left section: clinical profile, expand and collapse sections
- Middle section: chronological record, use Note and Document type filters
- Right section: if Reports selected, navigate between category options

The screenshot displays the Clinical EMR interface for a patient named Gladys Kravitz. The interface is divided into three main sections:

- Left Section (Clinical Profile):** Contains patient information (Gladys Kravitz, 02/14/1937, 89 yrs, 3 mo, Croatian Woman), vital signs (NKDA, RISK 0.55), and a list of clinical sections including Allergies, Drug Intolerances, Problem List, History, Permanent Rx Meds, Permanent OTC Meds, Scripts Since Last 6 Visits, Patient's Provider List, Other Info, and Health Maintenance. A "Confidential" status is also indicated.
- Middle Section (Chronological Record):** Features a search bar, filters for Note Type and Document Type, and a view selector (Vitals, Labs). It displays a list of events, including "Requiring Action" (11), "Outstanding Items" (4), and a "Chronological Record" of events from May 13, 2026, to April 3, 2026. Events include referrals, medication orders, and a "Fax Failed" notification.
- Right Section (Reports):** Displays a list of reports under the "Consult" category, including "Outstanding" (05/13/2026 Referral), "04/13/2026 -Referral", "01/06/2026 -Referral", and "12/17/2025 -Referral".

The interface includes a top navigation bar with links to Practice Home, Find Chart, Reports, and I need help. A bottom navigation bar contains icons for Visit Note, Notes, Msg, Rx, Orders, Handouts, Meds Hx, Reports, Referral, Letter, Forms, Payment, Directory, Templates, and More.

Reports

Navigate

Access Reports module from left-side navigation menu [\[5\]](#)

Filter

Apply date ranges, centers, teams, and status filters [\[5\]](#)

Export

Download reports in PDF, Excel, or CSV formats [\[5\]](#)

Standard Reports

[Assessments](#)[Authorizations](#)[Care Plans](#)[Immunizations](#)[Notes](#)[Orders](#)[Referrals](#)[Roster](#)[Schedule](#)

HPMS Reports

[Abuse](#)[Adverse Drug Reaction](#)[Adverse Outcome](#)[Appeals](#)[Burns Second Degree or Higher](#)[Denials](#)[Elopement](#)[Equipment-Related Occurrences](#)[ER & Urgent Care Visits](#)[Falls With Injury](#)[Falls Without Injury](#)[Fire/Other Disasters](#)[Foodborne Outbreak](#)[Grievances](#)[Immunizations - Flu](#)[Immunizations - PCV](#)[Infectious Disease](#)[Media-Related Event](#)[Medication Admin Errors](#)[Medication Related Occurrences](#)[Motor Vehicle Accident](#)[Pressure Injury](#)[Restraint Use](#)[Suicide Attempt/Suicide](#)[Unexpected Death](#)

CMS Audit Universes

[Service Determination...](#)[Appeal Requests](#)[Grievances](#)[On-call](#)[LOPMR](#)