

Guardian Trac Independence Portal

Learning Guide for Case Managers

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The Guardian Trac (GT) Independence portal is not a two-way communication tool. The portal is best used to support tracking enrollment status, reviewing hours and shifts worked by the Direct Support Worker (DSW), running reports, and setting pre-selected alerts so case managers (CMs) can receive email notifications when an alert is triggered.

Case-specific communication with GT should still happen by email and phone. The GT portal gives CMs access to information about individuals who are linked to them in GT's system. Standard CM access is expected to show the individuals tied to that CM.

The portal includes reports, notifications, and CM alerts. Reports can help CMs review information such as submitted time, shift status, service use, and possible gaps in service.

CMs can use the portal to

- Run reports
- Set alerts

What is not in the portal

- Enrollment documents including the assessment completed by GT
- Back-up planning or risk mitigation documents
- Service notes and documentation

Portal access

CMs may request access to the GT Portal once they are connected to at least one individual enrolled with AwC. GT will create the CM's username, and the CM will receive an email with instructions to activate the account and create a password.

Office coverage access

GT will provide each office with an all-access office login for coverage needs, such as vacant caseloads, worker-of-the-day assignments, desk partner coverage, or long-term absences. Each office is responsible for deciding how the login will be managed, shared, and monitored.

Portal access changes

Requests related to portal access, CM assignments, or changes to who can view an individual's information should be sent to the GT customer service (Email: customerservice@gtindependence.com). GT will route the request to the appropriate staff for follow-up.

Reports

CMs can use reports available in the Portal to review key information about enrollment, service use, shifts, and DSW activity. See the **GT Portal Quick Guide and Report Key** for more details about each available report.

Examples of information CMs can review through reports include:

- Check referral and enrollment status
- Compare approved service hours with hours worked
- Identify missed shifts, missed hours, or service gaps
- Review where and when a DSW clocked in and out
- Check which DSWs have recently provided services to the individual

Manage Alerts

Manage Alerts allows CMs to create optional email alerts for selected individuals. The available alerts include the **Caregiver Clock-In Alert** and the **Missed Visit Alert**. When setting an alert, the CM may select the individual, a specific DSW when applicable, the alert condition, and the email address that should receive

the notification. When the selected condition occurs, the CM receives an email. For example, a clock-in alert may help a CM know when the individual and DSW may both be available for a planned contact or visit.

Questions, concerns or complaints

For allegations of abuse, continue to follow the current process for making a report to APS. Questions, concerns, or complaints about GT should be sent to awc.info@odhsoha.oregon.gov. Complaints that do not meet APS reporting criteria will be documented and reviewed through the AwC licensing and monitoring process.

For concerns involving a DSW or service delivery that GT needs to address, contact GT first at customerservice@gtindependence.com or 1-877-659-4500. The email address and phone number serve as central points of contact for Agency with Choice inquiries. Calls and emails will be routed to the appropriate GT staff member based on the nature of the concern.

Complaints about GT operations, service delivery, or a DSW that do not require an APS report are documented, reviewed, investigated, and resolved according to Agency with Choice policies, procedures, and applicable rules.

When information in the portal may need follow-up from the CM

Examples of potential CM concerns include:

- The information in the portal does not match the information on the In-Home Service Plan (SDS 546N).
- The individual's approved hours are not being worked as planned.
- The individual has had no services for several days.
- A DSW is clocking in at a location that does not appear to match the expected service location.
- The individual may be having difficulty keeping DSWs.
- The CM cannot see an individual in the portal.

You can get this document in other languages, large print, braille or a format you prefer free of charge. Contact the Aging and People with Disabilities at apd.ltss@odhs.oregon.gov or 503-945-5600. We accept all relay calls.



Aging and People with Disabilities

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