LiveCare Marketplace User Guide
Provider Search Tool Module
OnSeen, Inc.

# LiveCare Marketplace

## Table of Contents



Note: All information displayed in figures and screenshots is composed of test data for display purposes only and does not display actual individual, organization, or agency information.

## Module Overview

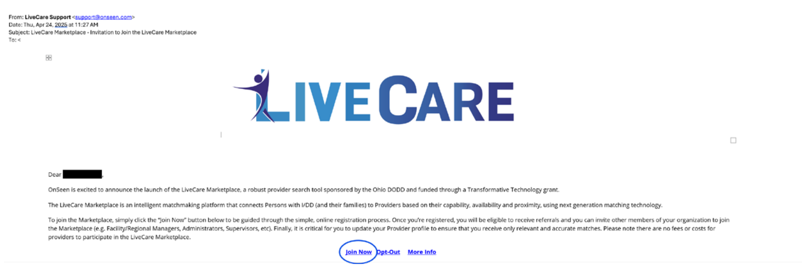
The Provider Search Tool (PST), also known as the Marketplace, component module is one of four organizational modules within the LiveCare platform, in addition to the Consumer Financial Account Management (CFAM), Transportation, and Homemaker Personal Care (HPC) modules.

The purpose of the PST module is to provide individuals, county board administrators, and organization administrators with a new and improved method of pairing individuals to providers via OnSeen's agentic Artificial Intelligence (AI) engine. All data recorded in the LiveCare system is stored securely and can be exported by site or organization for auditing and administrator approval.

# Provider Administrators

## Creating an Account

In order for a provider to create an administrator account, they must receive an email invitation.


From: **LiveCare Support** <support@onseen.com>
Date: Thu, Apr 24, 2025 at 11:27 AM
Subject: LiveCare Marketplace - Invitation to Join the LiveCare Marketplace
To: <

Dear [redacted],

OnSeen is excited to announce the launch of the LiveCare Marketplace, a robust provider search tool sponsored by the Ohio DODD and funded through a Transformative Technology grant.

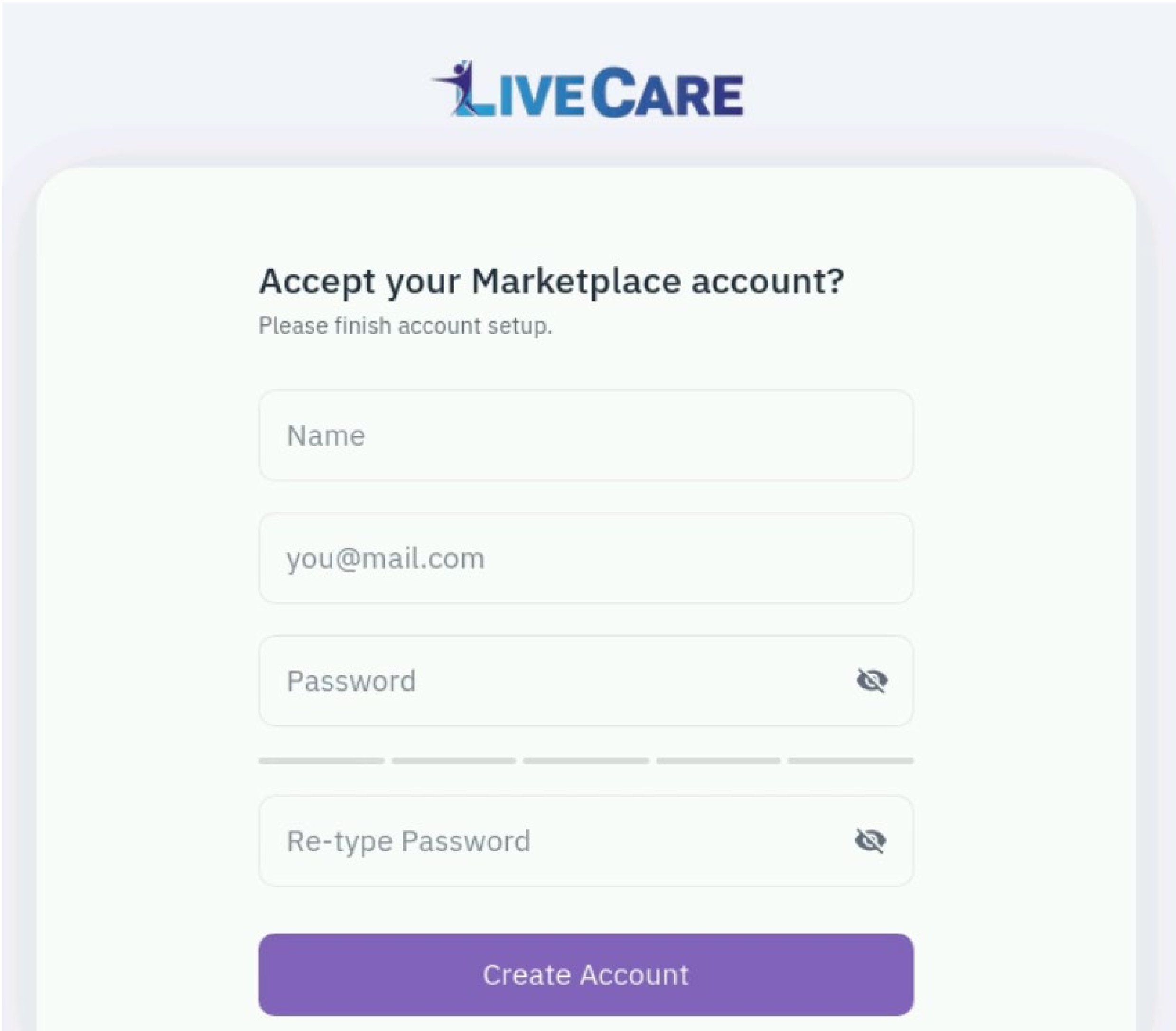
The LiveCare Marketplace is an intelligent matchmaking platform that connects Persons with I/DD (and their families) to Providers based on their capability, availability and proximity, using next generation matching technology.

To join the Marketplace, simply click the "Join Now" button below to be guided through the simple, online registration process. Once you're registered, you will be eligible to receive referrals and you can invite other members of your organization to join the Marketplace (e.g. Facility/Regional Managers, Administrators, Supervisors, etc). Finally, it is critical for you to update your Provider profile to ensure that you receive only relevant and accurate matches. Please note there are no fees or costs for providers to participate in the LiveCare Marketplace.

Join Now Opt-Out More Info

Providers wishing to join the Marketplace, should click on Join Now.  If you do not want to receive referrals, click on Opt Out.

Complete the fields to create an Administrator's Account and click Create Account. Providers will be able to give access to additional users.



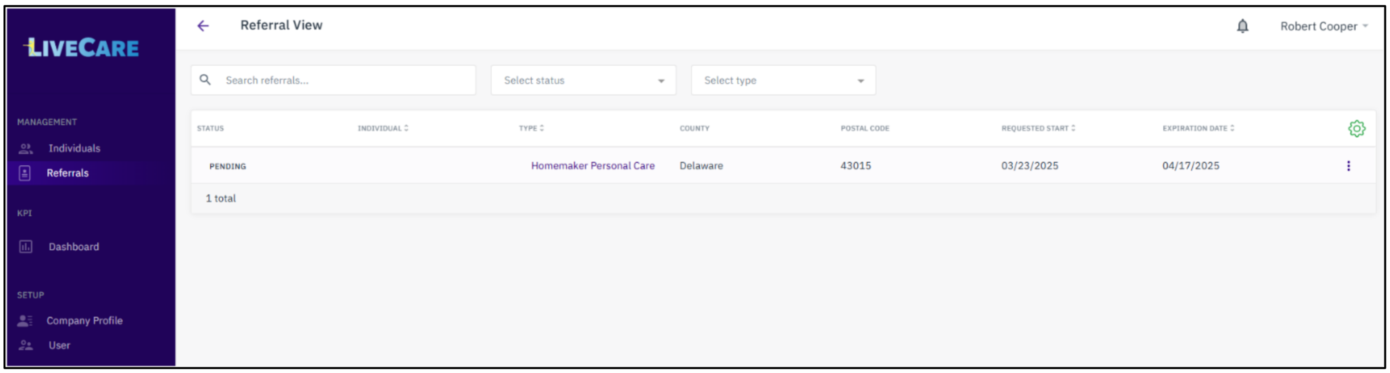

- Password requirements:
  - A minimum length of 8 characters
  - At least one lowercase letter
  - At least one uppercase letter
  - At least one number
  - At least one special character

Once logged in, click on Invitations on the Navigation menu. Users should see a row with all invitations which have been sent to their profile's email. Click on the dropdown menu icon at the far right of the row to either accept or decline the invitation. Accepting will grant the user administrator access to the organization which invited them.

# Navigating the Control Panel

Upon creating a new account and logging in, new administrator users will see a menu with a purple navigation menu on the left and a display window taking up most of the central screen.

This display window shows information based on which navigation menu option is selected. At the top right is the user's name where profile information can be viewed and edited.




Administrators will see five navigation menu options on the left side of their screen.

- Individuals
- Referrals
- Company Profile
- Dashboard
- User

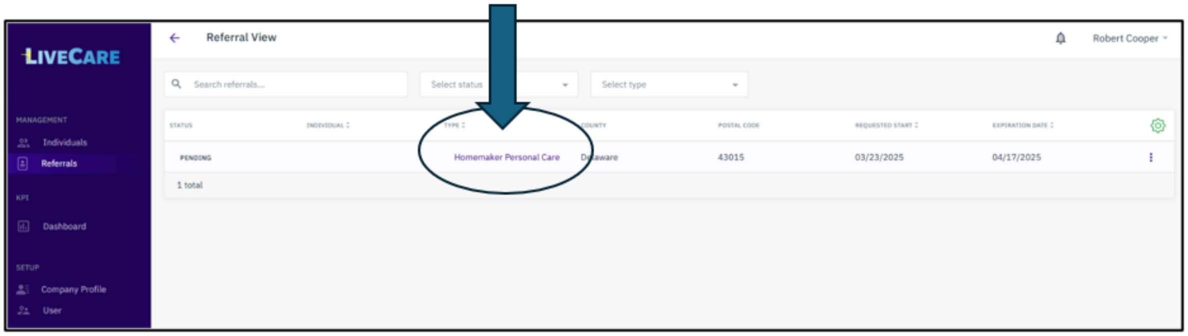
## Individuals

Displays all individuals with a registered account in the user's organization. Only individuals currently receiving care, indicated by a green ACTIVE status, and individuals who are no longer receiving care, indicated by a red INACTIVE status, will be displayed. Individuals who have requested care or have an outstanding referral with the organization but have not yet been accepted will appear under Referrals in the Navigation menu.

## Referrals

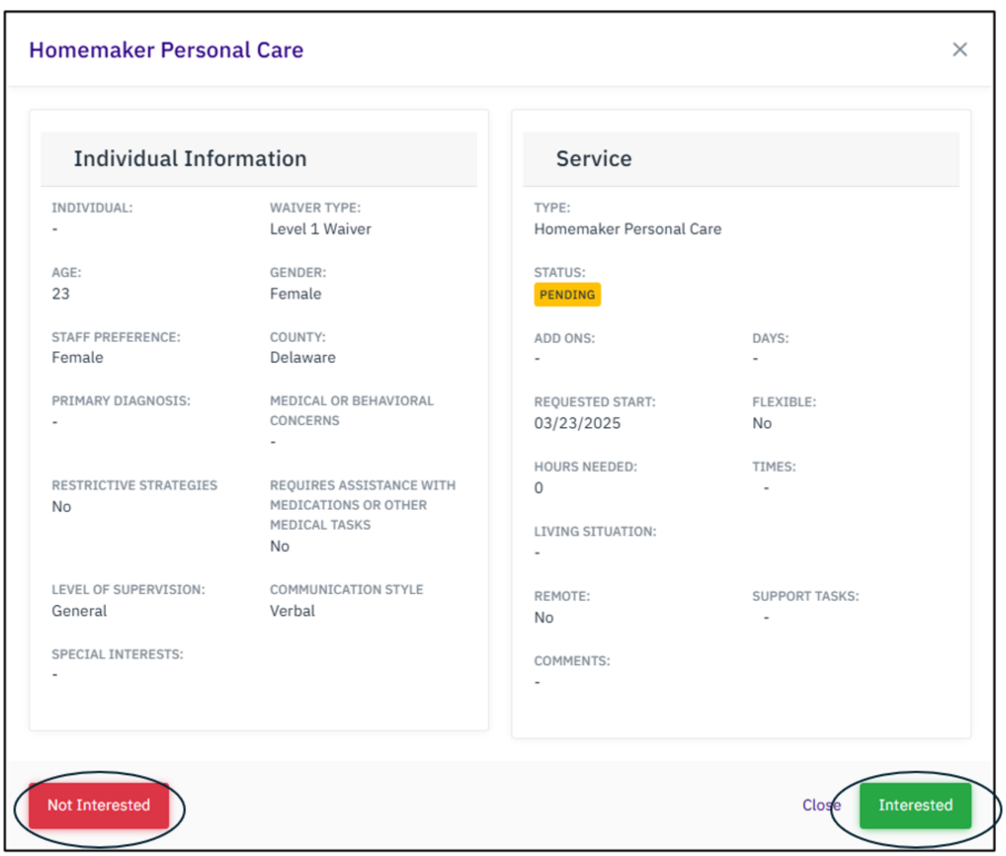
Displays all active referrals submitted to the organization for review.

- To view the details of a referral, click on the hyperlink under Type.




- Note that an individual's name cannot be viewed by an organization; instead, the individual's name only appears as dashes, and will continue to do so until the provider and individual agree to provide services and the county board approves the referral.

- To respond to a referral, click on the dropdown menu at the far right of the row for that referral and select either <u>Interested</u> or <u>Not Interested.</u> If selecting <u>Not Interested</u>, a reason must be provided in the text field in order to change the referral status to <u>Not Interested.</u>



- Referrals which have not been marked as either Interested or Not Interested will be assigned a Pending status until the administrator either assigns it a status or the referral times out.

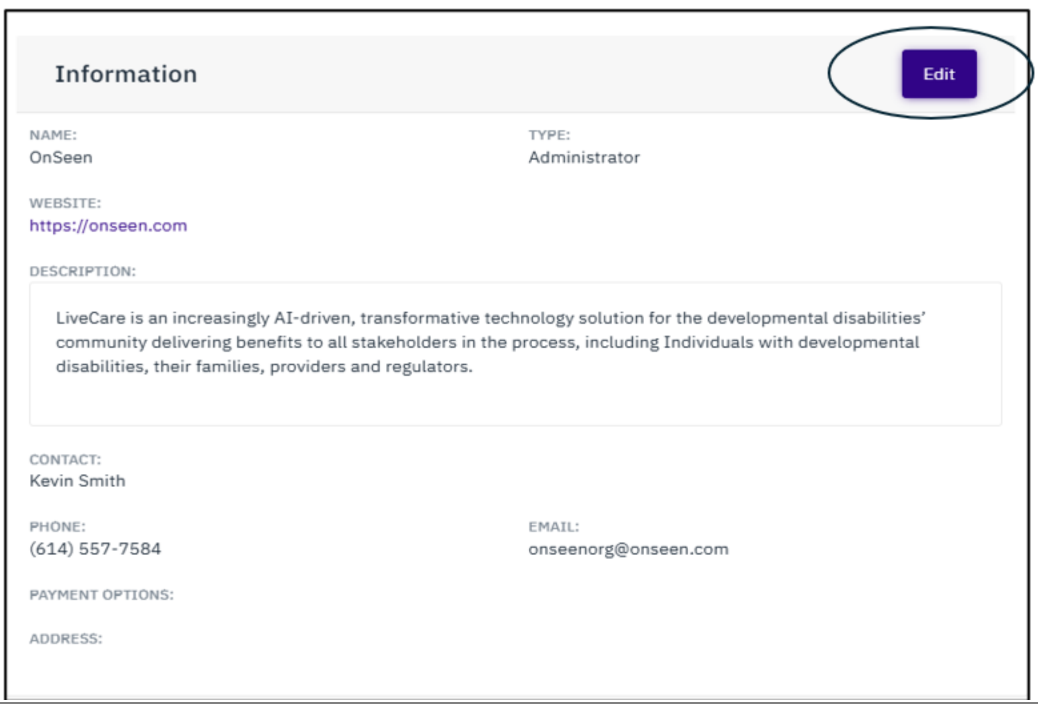
- Once a provider has been selected, their status will populate as Accepted on the dashboard. If a provider is not selected, the status of the referral will populate as Closed.

## Company Profile

Consists of the following two panels: Information and Services.

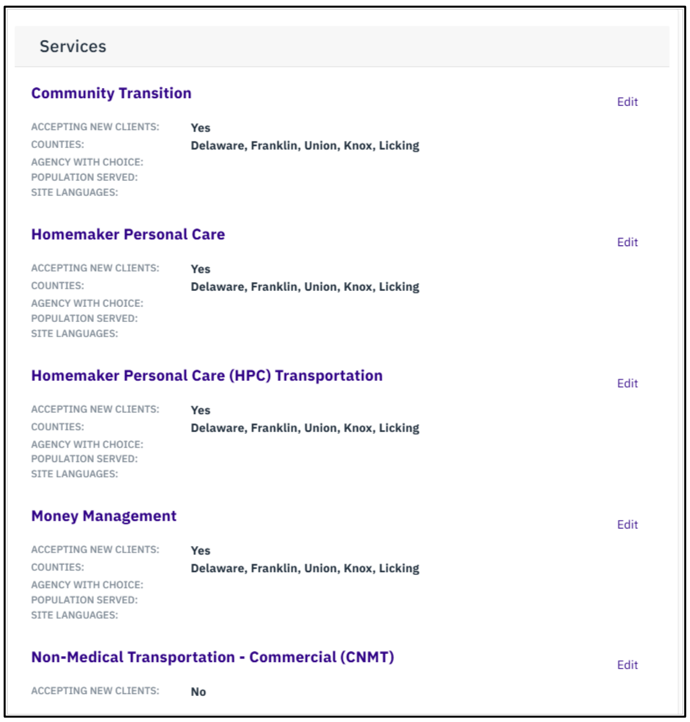
### Information

Shows the organization's general information including website, contact information, description, address, and payment options. To edit the company information, click the purple "Edit" button and fill in all applicable fields. All fields marked with a * must be filled in for the company information to be updated.



Services:

- Shows which services the provider offers
    - This information is updated daily to reflect the state PSM file and will only display services which the state holds as current.
- If the provider is accepting new clients
- Which counties the provider is accepting new services




Editing a Service

- To edit a service, including adding or removing counties and indicating whether new clients are being accepted, click on the purple Edit button and edit all applicable fields, then click Update in the bottom right.

Note: It is imperative that providers ensure the Services section is as up to date as possible because the AI engine will use this information to pair individuals with providers when a new referral is created. Inaccurate information in Services will impair LiveCare's ability to accurately pair individuals to providers, and requires active management by provider administrators.

## Dashboard

Displays graphs, charts, and reports for reporting, review, and auditing purposes.

## User

Lists all LiveCare users with access to the organization and their assigned role. Changes to user profiles may be made by clicking the dropdown at the far right of the user's row and selecting the desired option: Change Role, Change Regions, Update Locations, Change Employee #, Skills, Photo, and Availability. Administrators may also deactivate a user's profile by selecting Deactivate.

Inviting Additional Users

- To invite a new user, click Invited List above the search bar then click the purple Invite User button. Enter the desired email address and ensure the correct role is selected. All fields marked with a * must be filled in before a user can be invited. Once submitted, the invited user will receive an email with instructions on how to create and log into their account.

**Note:** If you find that you aren't receiving email referrals as expected, check your profile to ensure you are set up to receive emails for the intended service(s). The field – Referral Services, should list services in which you want to receive email alerts. Multiple representatives from each agency can be set up to receive email alerts.

Users with access to multiple organizations may toggle between them using the organization scroll bar at the bottom of the Navigation menu.

# Troubleshooting & Training

For general questions, HCDDS's provider support can be a resource: providersupport@hamiltonddsohio.gov.

For systems questions or more complex issues, please reach out to support@onseen.com.