



LiveCare User Guide

Provider Search Tool Module

OnSeen, Inc.

User Guide Layout

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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.

Service and Support Administrator

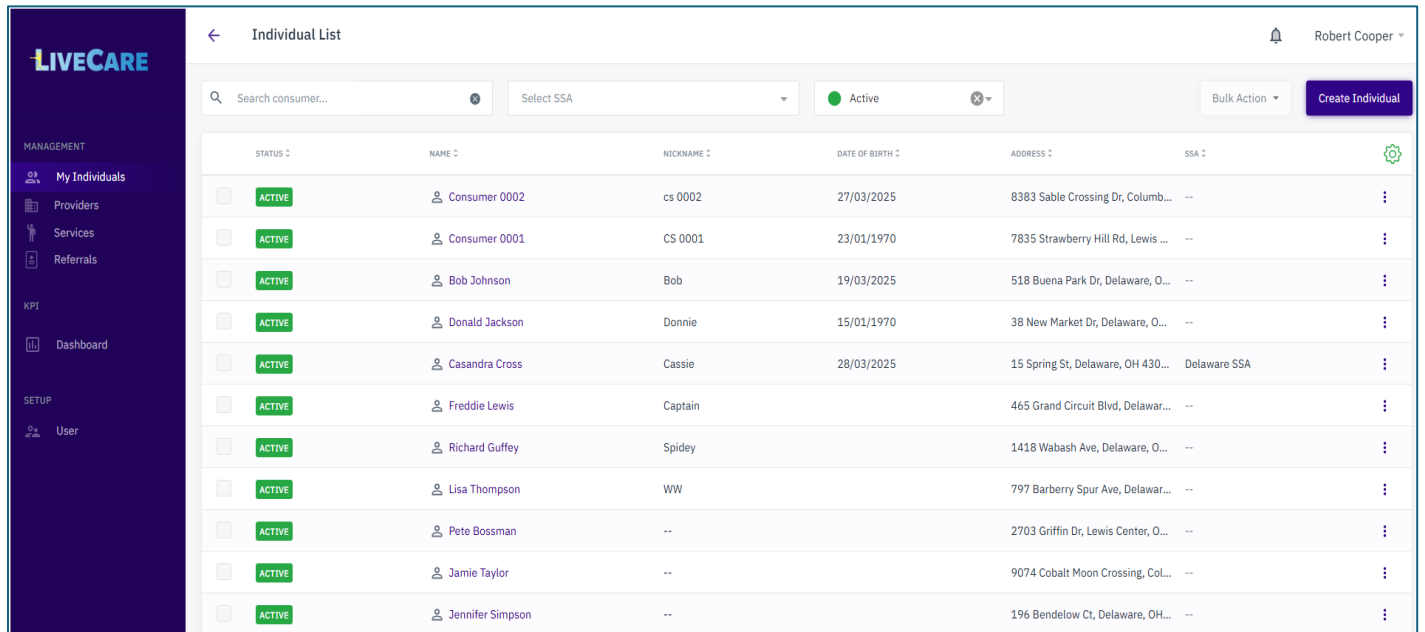
Getting Started

In order for a user to create a Service and Support Administrator (SSA) account, they must be invited by an existing organization administrator. See page 13 for information on inviting users. The invitation will be sent via email to the new user. Click on the link or copy and paste the web address into the browser to be directed to a "Create Account" page. All fields marked by a * symbol must be filled out before a user can submit their new account. Fill out all applicable information fields and click the purple "Sign Up" button. 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 SSA access to the organization which invited them.

- 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

Navigating the Control Panel

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



STATUS	NAME	NICKNAME	DATE OF BIRTH	ADDRESS	SSA	
ACTIVE	Consumer 0002	cs 0002	27/03/2025	8383 Sable Crossing Dr, Columb...	--	
ACTIVE	Consumer 0001	CS 0001	23/01/1970	7835 Strawberry Hill Rd, Lewis ...	--	
ACTIVE	Bob Johnson	Bob	19/03/2025	518 Buena Park Dr, Delaware, O...	--	
ACTIVE	Donald Jackson	Donnie	15/01/1970	38 New Market Dr, Delaware, O...	--	
ACTIVE	Casandra Cross	Cassie	28/03/2025	15 Spring St, Delaware, OH 430...	Delaware SSA	
ACTIVE	Freddie Lewis	Captain		465 Grand Circuit Blvd, Delawar...	--	
ACTIVE	Richard Guffey	Spidey		1418 Wabash Ave, Delaware, O...	--	
ACTIVE	Lisa Thompson	WW		797 Barberry Spur Ave, Delawar...	--	
ACTIVE	Pete Bossman	--		2703 Griffin Dr, Lewis Center, O...	--	
ACTIVE	Jamie Taylor	--		9074 Cobalt Moon Crossing, Col...	--	
ACTIVE	Jennifer Simpson	--		196 Bendelow Ct, Delaware, OH...	--	

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.

SSAs will see five navigation menu options:

- **Individuals:** Displays all individuals with a registered account in the SSA's organization.
 - To add a new individual account, click on the purple "Create Individual" and fill out all applicable fields. All fields marked with a * must be filled in for an account to be created. The address must be within the county organization of the user creating the account or the individual will not populate. The fields labeled 'Primary Diagnosis', 'Concerns', and 'Special Interests' are blank text fields for the SSA to fill out with any pertinent information not included in any other field. All information in the text field will be included when the LiveCare AI engine pairs individuals to providers in response to a referral.

- Once created, individual profiles may be updated by clicking on the drop down menu on the far right of the profile's row and selecting "Update Individual."
- When an SSA logs into their account, LiveCare will automatically display only the individuals assigned to that specific SSA. Use the "Select SSA" filter to filter by SSA, or click the gray X icon in the filter bar to clear the filter input and display all individuals in the county organization.
- **Providers:** Lists all providers which provide any form of care in a specific organization or county. This includes agency and independent providers. Clicking on the provider's name will bring up a window with the provider's information, point of contact, and services including which services are provided in which county.

Services

Homemaker Personal Care

ACCEPTING NEW CLIENTS:

Yes

COUNTIES:

Adams, Allen, Ashland, Ashtabula, Athens, Auglaize, Belmont, Brown, Butler, Carroll, Champaign, Clark, Clermont, Clinton, Columbiana, Coshocton, Crawford, Cuyahoga, Darke, Defiance, Delaware, Erie, Fairfield, Fayette, Franklin, Fulton, Gallia, Geauga, Greene, Guernsey, Hamilton, Hancock, Hardin, Harrison, Henry, Highland, Hocking, Holmes, Huron, Jackson, Jefferson, Knox, Lake, Lawrence, Licking, Logan, Lorain, Lucas, Madison, Mahoning, Marion, Medina, Meigs, Mercer, Miami, Monroe, Montgomery, Morgan, Morrow, Muskingum, Noble, Ottawa, Paulding, Perry, Pickaway, Pike, Portage, Preble, Putnam, Richland, Ross, Sandusky, Scioto, Seneca, Shelby, Stark, Summit, Trumbull, Tuscarawas, Union, Van Wert, Vinton, Warren, Washington, Wayne, Williams, Wood, Wyandot

AGES SERVED:

Adults, Children 18 Amp Under

SECTION 8 VOUCHER:

Yes

Homemaker Personal Care (HPC) Transportation

ACCEPTING NEW CLIENTS:

Yes

COUNTIES:

Adams, Allen, Ashland, Ashtabula, Athens, Auglaize, Belmont, Brown, Butler, Carroll, Champaign, Clark, Clermont, Clinton, Columbiana, Coshocton, Crawford, Cuyahoga, Darke, Defiance, Delaware, Erie, Fairfield, Fayette, Franklin, Fulton, Gallia, Geauga, Greene, Guernsey, Hamilton, Hancock, Hardin, Harrison, Henry, Highland, Hocking, Holmes, Huron, Jackson, Jefferson, Knox, Lake, Lawrence, Licking, Logan, Lorain, Lucas, Madison, Mahoning, Marion, Medina, Meigs, Mercer, Miami, Monroe, Montgomery, Morgan, Morrow, Muskingum, Noble, Ottawa, Paulding, Perry, Pickaway, Pike, Portage, Preble, Putnam, Richland, Ross, Sandusky, Scioto, Seneca, Shelby, Stark, Summit, Trumbull, Tuscarawas, Union, Van Wert, Vinton, Warren, Washington, Wayne, Williams, Wood, Wyandot

AGES SERVED:

Adults, Children 18 Amp Under

SECTION 8 VOUCHER:

Yes

- Services: Each row lists one service offered by a specific provider and includes a link to the affiliated compliance report for that specific service.
- Referrals: Lists all Pending, Approved, and Declined referrals in the SSA’s organization.
 - There are two ways to submit a new referral – either by clicking the “Add Referral” at the top right of the window under the referral list, or by clicking on an individual’s name in the “Individuals” option in the Navigation menu and selecting “New” in the “Referrals” section.

Create Referral [Close]

1 2 3
SERVICE INFORMATION FIND PROVIDER CONFIRMATION

INDIVIDUAL*

Consumer 0001 [X] [v]

TYPE *

Adult Day Support [X] [v]

REQUESTED START* WORKDAY

03/31/2025 Select Workday [v]

☐ Is Start Date Flexible?

☐ Transportation Required?

DAYS

☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

TIMES PROVIDER TYPE

Select Times [v] Select Provider [v]

PLACE ON PATH TO EMPLOYMENT?

Select Path [v]

EXPECTED OUTCOME

[Text Area]

Close Next

- The referral process consists of three steps: Service Information, Find Provider, and Confirmation.
 - The first step in creating a new referral is filling out the “Service Information” menu with all information detailing requested services. Fill out all applicable fields – the more information that is provided, the better the AI engine will be able to pair the individual to the best provider. At a minimum, all fields with a * must be filled in for a referral to be created.
 - The second step is the “Find Providers” menu. Here a complete list of providers whose profiles indicate they provide the requested service in the relevant county and are accepting new referrals will be generated. This list is generated based on all the information input by the user during step one, the needs detailed in the individual’s profile, and the services and availability input by providers. This will reduce the possibility of an individual being paired with a provider that is unable to meet their specific needs, does not service their county, or is not accepting new referrals. LiveCare will default to selecting all providers, but the user may select or deselect a provider by simply clicking the purple checkbox for that provider.
 - During step two, the user may click on the “Download” link which will download a PDF file with the list of all selected providers and their company profile information. This can be printed out for an individual or emailed to them prior to the final creation of the referral.
 - The third step allows the user to review and confirm the provider selections made during step two. Here the user may click on each provider to see their information. Once finished reviewing, click on the purple “Create Referral” button in the bottom left of the window to submit the new referral.

- Once created, new referrals will be assigned a “pending” status until the referral is either approved, declined, or expires. Referrals will expire 60 days from the date they were created if they have not been either approved or declined.
 - Referral status definitions:
 - Saved: Referral has been created but not submitted for approval. Referral may be edited, deleted, or providers added while in a saved status.
 - Pending: Referral has been created and submitted for approval. Referral may be edited, deleted, or providers added while in a pending status.
 - Approved: Referral has been approved by an authorized SSA or administrator and released to providers. Referral may no longer be edited or deleted, but user may add additional providers.
 - Declined: Referral was declined by an authorized SSA or administrator and is not released to providers. The referral cannot be edited and a new one must be created.
 - Completed: Provider and individual have agreed to provide and receive services. Referrals in a completed status have been accepted by a particular provider and all other providers will receive a notification that they have not been selected and the referral is completed.
- After creating a new referral, an SSA or approved administrator must review and either approve or decline the referral. Note that an individual or guardian, as well as SSAs, may create a referral, but only SSAs and authorized administrators may approve or decline the referral.
- A pending referral can be updated in the “Referrals” Navigation menu until it is either approved or declined. To update a referral, click on the dropdown menu icon at the end of the row for the desired referral and select “Update,” make all

desired changes, and click “Create Referral” on the confirmation menu. This will update the referral and send a notification to new providers if any new providers were added.

- To approve or decline a referral, click on the dropdown menu icon at the end of the row for the desired referral and select “Approve” or “Decline.”
- Once approved, the providers will indicate whether they are “Interested” or “Not Interested.” Once a provider has been selected to fulfill the referral for service, go to the “Referral View” for that referral, click “View” on the desired provider, and select “Approve” at the bottom of the window. This will change the referral’s status to “Approved” and all other providers will now view that referral’s status as “Closed.”

LIVECARE

MANAGEMENT

My Individuals

Providers

Services

Referrals

KPI

Dashboard

SETUP

User

Referral View

Robert Cooper

Individual

NAME:

Consumer 0002

NICKNAME:

cs 0002

EXTERNAL KEY/MEDICAID NUMBER:

cs-0002

WAIVER TYPE:

-

EMAIL:

-

PHONE:

-

AGE:

-

GENDER:

-

STAFF PREFERENCE:

-

PROVIDER TYPE:

-

PRIMARY DIAGNOSIS:

-

MEDICAL OR BEHAVIORAL CONCERNS:

-

RESTRICTIVE STRATEGIES:

No

REQUIRES ASSISTANCE WITH MEDICATIONS OR OTHER MEDICAL TASKS:

No

LEVEL OF SUPERVISION:

-

COMMUNICATION STYLE:

-

SPECIAL INTERESTS:

-

PRIMARY LOCATION:

8383 Sable Crossing Dr, Columbus, OH 43240, USA

Service

TYPE:

Shared Living

COMMENTS:

-

REQUESTED START:

04/30/2025

FLEXIBLE:

Yes

Providers

PROVIDER ID	STATUS	FEEDBACK	
1st Choice Family Services, Inc.	INTERESTED	-	View
DIVINE HEALTHCARE SERVICES, LLC	PENDING	-	View
Elena D Thomas	PENDING	-	View
3 total			

Invide Providers

1st Choice Family Services, Inc.

STATUS: **Interested**

TYPE: Agency

COMPLIANCE REPORT: <https://pocprodapps.blob.core.windows.net/poclib/d46fafb4-9989-e611-9003-0050568c30ca.pdf>

WEBSITE: <https://www.1stchoicfamilyservices.org/>

CONTACT: Coles Keith 2

PHONE: (614) 578-4219

EMAIL: aonist@1stcfs.org

ADDRESS: 175 S. 3rd St, Suite 200, Columbus, OH 43215

1st Choice Family Services supports people with developmental disabilities by connecting them with expert direct support professionals who help them overcome challenges and live their best lives as independently as possible.

Our History

After years of working in the direct support professional industry, our leaders realized there was room for improvement in the business. That's why more than 15 years ago they decided to create a company with the promise of doing things the right way.

CARE ON YOUR TERMS

Every person should have the right to decide how they want to live their lives. At 1CFS, we design our services to provide you with independence and informed decision-making so you can live your life just the way you want it.

A NEW WAY OF DOING THINGS

A lot of positive changes have been made since the ADA Act of 1990. Still, poor care coordination and lack of training for DSPs are the most common issues in the industry. We aim to eradicate these with our world-class training and coordination systems. Our Remote Monitoring Services are the answer to an increased need for independent living for those with developmental disabilities.

Close

Accept

Providers			
PROVIDER ↕	STATUS ↕	FEEDBACK	
1st Choice Family Services, Inc.	ACCEPTED	-	View
DIVINE HEALTHCARE SERVICES, LLC	CLOSED	-	View
Elena D Thomas	CLOSED	-	View
3 total			

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

Organization Administrator

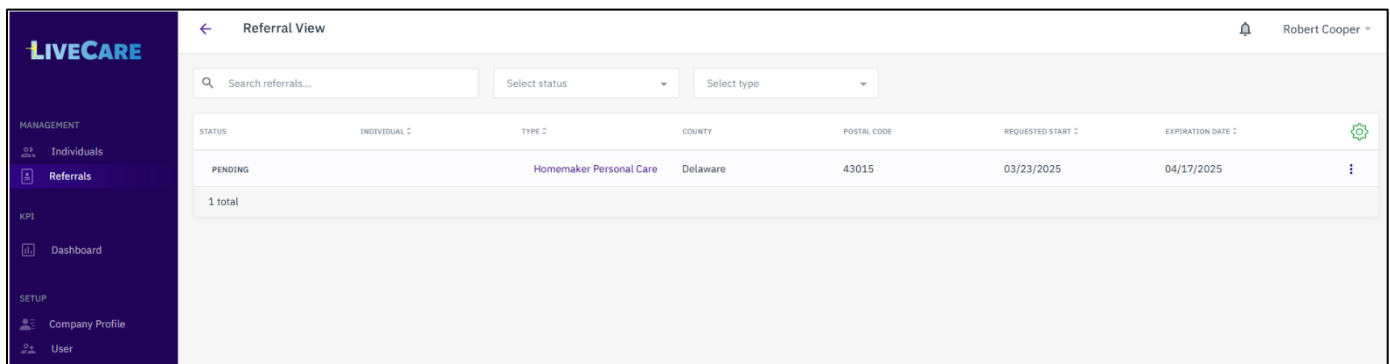
Getting Started

In order for a user to create an Organization Administrator, hereafter just “administrator,” account, they must be invited by an existing administrator. See page 13 for information on inviting users. The invitation will be sent via email to the new user. Click on the link or copy and paste the web address into the browser to be directed to a “Create Account” page. All fields

marked by a * symbol must be filled out before a user can submit their new account. Fill out all applicable information fields and click the purple “Sign Up” button. 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:

- 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.

Homemaker Personal Care
×

Individual Information

INDIVIDUAL:

-

WAIVER TYPE:

Level 1 Waiver

AGE:

23

GENDER:

Female

STAFF PREFERENCE:

Female

COUNTY:

Delaware

PRIMARY DIAGNOSIS:

-

MEDICAL OR BEHAVIORAL CONCERNS

-

RESTRICTIVE STRATEGIES

No

REQUIRES ASSISTANCE WITH MEDICATIONS OR OTHER MEDICAL TASKS

No

LEVEL OF SUPERVISION:

General

COMMUNICATION STYLE

Verbal

SPECIAL INTERESTS:

-

Service

TYPE:

Homemaker Personal Care

STATUS:

PENDING

ADD ONS:

-

DAYS:

-

REQUESTED START:

03/23/2025

FLEXIBLE:

No

HOURS NEEDED:

0

TIMES:

-

LIVING SITUATION:

-

REMOTE:

No

SUPPORT TASKS:

-

COMMENTS:

-

Not Interested
Close
Interested

- To respond to a referral, click on the dropdown menu at the far right of the row for that referral and select either “Interested” or “Not Interested.” If selecting

“Not Interested,” a reason must be provided in the text field in order to change the referral status to “Not Interested.”

- 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. All other providers will receive a notification that they have not been selected, and their status 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.

Information

Edit

NAME:
OnSeen

TYPE:
Administrator

WEBSITE:
<https://onseen.com>

DESCRIPTION:

LiveCare is an increasingly AI-driven, transformative technology solution for the developmental disabilities' community delivering benefits to all stakeholders in the process, including Individuals with developmental disabilities, their families, providers and regulators.

CONTACT:
Kevin Smith

PHONE:
(614) 557-7584

EMAIL:
onseenorg@onseen.com

PAYMENT OPTIONS:

ADDRESS:

- Services: Shows which services the provider offers, whether they are accepting new clients, and in which counties the services are provided. This information is updated daily to reflect the state PSM file and will only display services which the state holds as current.

Services	
Community Transition ACCEPTING NEW CLIENTS: Yes COUNTIES: Delaware, Franklin, Union, Knox, Licking AGENCY WITH CHOICE: POPULATION SERVED: SITE LANGUAGES:	Edit
Homemaker Personal Care ACCEPTING NEW CLIENTS: Yes COUNTIES: Delaware, Franklin, Union, Knox, Licking AGENCY WITH CHOICE: POPULATION SERVED: SITE LANGUAGES:	Edit
Homemaker Personal Care (HPC) Transportation ACCEPTING NEW CLIENTS: Yes COUNTIES: Delaware, Franklin, Union, Knox, Licking AGENCY WITH CHOICE: POPULATION SERVED: SITE LANGUAGES:	Edit
Money Management ACCEPTING NEW CLIENTS: Yes COUNTIES: Delaware, Franklin, Union, Knox, Licking AGENCY WITH CHOICE: POPULATION SERVED: SITE LANGUAGES:	Edit
Non-Medical Transportation - Commercial (CNMT) ACCEPTING NEW CLIENTS: No	Edit

- 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.

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 thus 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.”
 - 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 user invited user will receive an email with instructions on how to create and log into their account.

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