umbra HEALTH ADVOCACY

Carewell®

ADVOCATE GUIDE

What to Do When You Get a New Carewell Client

Welcome!

This guide walks you through exactly what to expect—and what to do—when you're matched with a client from the Carewell / Umbra Partnership. Follow these simple steps to stay organized and deliver excellent care.

How You'll Know You Have a New Client

When we match you with a new patient, you'll be notified in several ways:

01.

They'll appear in your "Clients" section in Healthie. You will automatically be granted access to their chart.

02.

A new chat will open with the patient in Healthie Chat. This serves as your secure, ongoing communication channel.

03.

You may receive a system notification from Healthie. (Exact behavior may vary based on your personal notification settings and configuration.)

04.

You may see a new appointment called "Meet Your Carewell Advocate" in Healthie once the patient's first appointment with you has been scheduled.

Client not a great fit for your expertise? Reach out to us right away at carewell@umbrahealthadvocacy.com

What To Do First (within 1 business day)

✓ **Reach out and say hello.**
Send the patient a warm, simple introduction message in Healthie chat. If needed, offer to help them navigate the portal.

If your client needs more than 10 hours of service in a month, please reach out and get permission from us at carewell@umbrahealthadvocacy.com

Conducting Assessments

How to Prepare for the “Meet Your Carewell Advocate” Session

Before your first session, take time to review all available information:

1. Review the patient’s completed intake forms.

It’s critical to understand the patient’s perspective and priorities. In reviewing the information they have already provided, pay attention to red flags, functional limitations, and any stated goals. As a reminder, you can find these under the Client record > Charting > Forms > View Client Forms. **Be sure to review the Document from Carewell outlining what the patient has already told Carewell.**

2. Prepare any questions or topics you want to explore.

Use your Carewell Companion Training Guide located in the Documents section of Healthie.

During the “Meet Your Carewell Advocate” Session

This is your comprehensive, initial assessment session.

- Healthie’s AI Scribe will automatically draft your charting note using “Advocacy In-Depth Assessment.”
- Focus on uncovering the patient’s needs, gaps, priorities, risks, preferences, and goals.
- Establish meeting frequency and schedule a **follow-up session** no later than **next week** to review the Care Plan before the call ends.

After the Assessment

1. Complete Your Assessment Note (within 1 business day).

In the Charting Section, review the draft Charting Note that was created by AI Scribe, edit, and finalize your “Advocacy In-Depth Assessment” note. Confirm accurate time tracking for the service.

2. Build the Care Plan (within 3 business days).

Use Charting Form “Advocacy Care Plan” to create a clear, actionable plan. Include goals, interventions, frequency, communication plans, and coordination needs.

3. Update Umbra.

Once you’ve submitted your Care Plan, please update Umbra with an email to carewell@umbrahealthadvocacy.com, with the subject line “Care Plan Completed: [client’s initials].”

What Happens After the First Session

All ongoing meetings follow the same structure:

Every Follow-Up Session

1. Conduct your session(s) using Healthie's Zoom visit functionality. If the patient prefers to speak by phone only, they can use the dial-in number and skip the video.
2. Healthie's AI Scribe drafts your note using **"Advocacy Activity Log."**
3. Finalize your documentation the **same day**.
4. Track your time for all service minutes and enter it in the chart note field "Total time spent in minutes." Add time tracking updates daily.
5. Use **"Advocacy Activity Log"** for offline work as well, like research, care coordination, and documentation. Be sure you track your time for each activity that is supporting the patient's progress and goals.

At the End of the Month

1. Update the care plan using template Advocacy Care Plan. Be sure to add progress notes and document new goals / sub-goals.

Billing & Payment

Umbra handles all billing on your behalf, but we can only do that if you track your time in a thorough and timely manner.

You will receive payments through **Bill.com**, on a monthly cycle, assuming you submit your invoice by the 5th of the following month. Create your monthly invoice using the template available at: **www.UmbraHealthAdvocacy.com/AdvocateInvoice**

Add each client's monthly hours as a new row. The invoice will calculate the totals.

Monthly Requirements

✓ **Create and Submit Advocacy Care Plan Update** (for each patient you work with)

✓ **Submit Your Monthly Invoice**
Use our Template at **www.UmbraHealthAdvocacy.com/AdvocateInvoice**

✓ **Keep Your Capacity Updated**
If your availability or bandwidth changes, update it here: **www.UmbraHealthAdvocacy.com/Capacity**

Questions?

Contact us today at
carewell@umbrahealthadvocacy.com

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