umbra
HEALTH ADVOCACY

ADVOCATE GUIDE

What to Do When You Get a New Umbra Client



Welcome!

This guide walks you through exactly what to expect—and what to do—when you're matched with a new Medicare beneficiary from Umbra. Follow these simple steps to stay organized, deliver excellent care, and stay compliant.

How You'll Know You Have a New Client

When Umbra matches you with a new patient, you'll be notified in several ways:

01.
You'll receive an email from Umbra confirming the new match. This will include key reminders and next steps.

02.
They'll appear in your "Clients" section in Healthie. You will automatically be granted access to their chart.

03.
A new chat will open with the patient in Healthie Chat. This serves as your secure, ongoing communication channel.

04.
You may receive a system notification from Healthie. (Exact behavior may vary based on your personal notification settings and configuration.)

05.
You may see a new appointment called Medicare In-Depth Assessment in Healthie if the patient's first appointment with you has already been scheduled.

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.

✓ **Book the In-Depth Assessment.**
If the appointment has not been scheduled yet, please schedule it with the patient right away. (Use the Appointment Type called "Medicare Advocate Initial Visit (In-Depth Assessment)".)

✓ **Update Umbra.**
Once you've scheduled your assessment, please update Umbra with an email to medicare@umbrahealthadvocacy.com, with the subject line "In-Depth Assessment Scheduled: [client's initials]."

Conducting Assessments

How to Prepare for the In-Depth Assessment

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

1. Review the provider's Initiating Visit notes (called "1A - Medicare Initiating Visit").

This documentation gives you the clinical foundation and context for your work. You can find the charting note in the Client record > Charting > View Charting Notes.

2. 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.

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

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

During the In-Depth Assessment

This is your comprehensive, initial assessment session.

- Healthie's AI Scribe will automatically draft your charting note using "2A – Medicare 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** for **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 "2A Medicare In-Depth Assessment" note. If you are not able to conduct your Session over Zoom, you will need to populate your own "2A Medicare In-Depth Assessment" charting note. Confirm accurate time tracking for the service.

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

Use Charting Form "2B – Medicare Care Plan" to create a clear, actionable plan. Include goals, interventions, frequency, communication plans, and coordination needs.

3. Submit the Care Plan to Your Supervising Provider.

Your Supervising Provider has 5 business days to review, approve, and add comments.

4. Update Umbra.

Once you've submitted your Care Plan, please update Umbra with an email to medicare@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 **"3A – Medicare 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."
5. Use **"3A – Medicare 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 2B - Medicare Care Plan. Be sure to add progress notes and document new goals / sub-goals.
2. Submit it to your Supervising Provider for approval and signature. You can submit it via the Chat functionality or by creating and assigning a Task for your Provider.



Monthly Requirements

✓ **Create and Submit Medicare 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**

Billing & Payment

Umbra handles all Medicare 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. Your first paycheck from Umbra will also include payment for your training hours.

Umbra pays Net 30.



Support & Resources

Available in Healthie → **Documents**:

- Template 1A — Medicare Initiating Visit
- Template 2A — Medicare In-Depth Assessment
- Template 2B — Medicare Care Plan
- Template 3A — Medicare Activity Log
- Companion Guides
- Video Walkthroughs
- Reimbursement Guides
- Policies & Procedures

Questions?

Contact us today at
medicare@umbrahealthadvocacy.com

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