



Leading America in Health Care
Solutions for the Underserved
and Chronically Ill.

Provider Portal Participant Guide

Corporate Clinical Systems Training Department

Original Date: 01/15/2019

Updated Date: 06/02/2021

Updated By: Jessica Williams
Kassandra Borges

Next Review Date: 05/01/2022

Review Cycle: Annually

The information contained in this training document / PowerPoint is confidential, proprietary, and only for use by the intended recipient. This training document/PowerPoint may not be copied, published, and/or redistributed without the prior written consent of AmeriHealth Caritas. Training materials must be returned in the event of separation from AmeriHealth Caritas.

TABLE OF CONTENTS

| | |
|--|-----------|
| 1 LOGGING IN TO THE PROVIDER PORTAL | 4 |
| Logging in to Provider Portal | 5 |
| Overview of the Dashboard | 8 |
| Overview of the Dashboard: To-Do View..... | 9 |
| Overview of the Dashboard: Team View..... | 11 |
| 2 SEARCHING FOR A MEMBER | 12 |
| Searching for a Member – Search Request Tab..... | 13 |
| Searching for a Member – New Request Tab | 14 |
| 3 ENTER AN IP CLINICAL REQUEST | 15 |
| How to Enter an Inpatient Clinical Request..... | 16 |
| Adding a New IP Clinical Request – Adding Episode Details..... | 17 |
| Adding a New IP Clinical Request – Adding Diagnosis..... | 18 |
| Adding a New IP Clinical Request – Adding Providers | 19 |
| Adding a New IP Clinical Request – Adding Stay Request..... | 21 |
| Adding a New IP Clinical Request – Adding Service Request (if applicable)..... | 22 |
| Adding a New IP Clinical Request – InterQual..... | 24 |
| Adding a New IP Clinical Request – Adding Assessments | 27 |
| Adding a New IP Clinical Request – Adding Documents | 28 |
| Adding a New IP Clinical Request – Adding Notes | 29 |
| Adding a New IP Clinical Request – Submitting the Request..... | 30 |
| 4 ENTER AN IP NON-CLINICAL REQUEST | 31 |
| How to Enter an Inpatient Non-Clinical Request..... | 32 |
| Adding a New IP Non-Clinical Request – Adding Episode Details | 33 |
| Adding a New IP Non-Clinical Request – Adding Diagnosis..... | 34 |
| Adding a New IP Non-Clinical Request – Adding Providers..... | 35 |
| Adding a New IP Non-Clinical Request – Stay Request..... | 37 |
| Adding a New IP Non-Clinical Request – Adding Service Request (if applicable)..... | 38 |
| Adding a New IP Non-Clinical Request – Adding Documents..... | 40 |
| Adding a New IP Non-Clinical Request – Adding Notes | 41 |
| Adding a New IP Non-Clinical Request – Save as Draft | 42 |
| 5 ADD CLINICAL TO AN EXISTING IP NON-CLINICAL REQUEST | 43 |

| | |
|---|-----------|
| How to Add Clinical Information to Existing IP Non-Clinical Request | 44 |
| Adding Clinical Information to Existing IP Non-Clinical Request – Edit Request | 46 |
| Adding Clinical Information to Existing IP Non-Clinical Request – InterQual | 47 |
| Adding Clinical Information to Existing IP Non-Clinical Request – Assessments | 50 |
| Adding Clinical Information to Existing IP Non-Clinical Request – Adding Documents..... | 51 |
| Adding Clinical Information to Existing IP Non-Clinical Request – Adding Notes | 52 |
| Adding Clinical Information to Existing IP Non-Clinical Request – Submitting the Request..... | 53 |
| 6 ENTER AN OP CLINICAL REQUEST | 54 |
| How to Enter an Outpatient Clinical Request | 55 |
| Adding a New OP Clinical Request – Adding Episode Details | 56 |
| Adding a New OP Clinical Request – Adding Diagnosis | 57 |
| Adding a New OP Clinical Request – Adding Providers..... | 58 |
| Adding a New OP Clinical Request – Adding Service Request..... | 60 |
| Adding a New OP Clinical Request – InterQual | 62 |
| Adding a New OP Clinical Request – Adding Assessments..... | 65 |
| Adding a New OP Clinical Request – Adding Documents..... | 66 |
| Adding a New OP Clinical Request – Adding Notes | 67 |
| Adding a New OP Clinical Request – Submitting the Request..... | 68 |
| 7 ENTER AN OP NON-CLINICAL REQUEST | 69 |
| How to Enter an Outpatient Non-Clinical Request | 70 |
| Adding a New OP Non-Clinical Request – Adding Episode Details | 71 |
| Adding a New OP Non-Clinical Request – Adding Diagnosis | 72 |
| Adding a New OP Non-Clinical Request – Adding Providers | 73 |
| Adding a New OP Non-Clinical Request – Adding Service Request..... | 75 |
| Adding a New OP Non-Clinical Request – Adding Documents | 77 |
| Adding a New OP Non-Clinical Request – Adding Notes..... | 78 |
| Adding a New OP Non-Clinical Request – Saving as Draft..... | 79 |
| 8 ADD CLINICAL TO AN EXISTING OP NON-CLINICAL REQUEST | 80 |
| Adding Clinical Information to an Existing OP Non-clinical Request | 81 |
| Adding Clinical Information to Existing OP Non-Clinical Request – Edit Request | 83 |
| Adding Clinical Information to Existing OP Non-Clinical Request – InterQual | 84 |
| Adding Clinical Information to Existing OP Non-Clinical Request – Assessments..... | 87 |
| Adding Clinical Information to Existing OP Non-Clinical Request – Adding Documents..... | 88 |
| Adding Clinical Information to Existing OP Non-Clinical Request – Adding Notes | 89 |
| Adding Clinical Information to Existing OP Non-Clinical Request – Submitting Request..... | 90 |
| 9 ADDITIONAL PROCESSES | 91 |

| | |
|---|------------|
| Search for Determination..... | 92 |
| Extending an Existing Request..... | 93 |
| Extending an Existing Request – Adding Assessments | 95 |
| Extending an Existing Request – Adding Notes..... | 96 |
| Extending an Existing Request – Adding Documents | 97 |
| Add Additional Diagnoses to an Existing Request | 98 |
| Favorite Diagnosis List – How to Create..... | 99 |
| Favorite Diagnosis List – Utilizing the List..... | 101 |
| Favorite Providers List – How to Create | 102 |
| Favorite Providers List – Utilizing the List | 103 |
| Favorite Services List – How to Create..... | 104 |
| Favorite Services List – Utilizing the List..... | 105 |
| 10 RESOURCES..... | 106 |
| Plan Contact Information | 107 |
| Escalation Process and Training Requests – Account Executives and Providers | 107 |



1 LOGGING IN TO THE PROVIDER PORTAL

Logging in to Provider Portal

Sign In

Username:

Password:

Sign In

[Forgot your password?](#)
[Forgot your username?](#)

Getting Started with NaviNet

[Trouble Logging In?](#)
[Sign Up](#)
[What Plans Participate?](#)

AllPayer Access: New Year—are you ready? Re-Save Bookmarks Discontinued Support of Windows Vista

Important Information

We recently made some updates that might cause an error to render when accessing old bookmarks.

To avoid this, please navigate to the page you would like to bookmark and re-save it.

Coming This March!

We will be asking all users to provide and verify a valid email address.

Learn More...

Are You In The Loop?

Make sure you don't miss out on our important updates. Update your email address today by logging in and going to **My Account** and clicking **About Me** to receive important updates and information.

Are You Sharing Login Credentials?

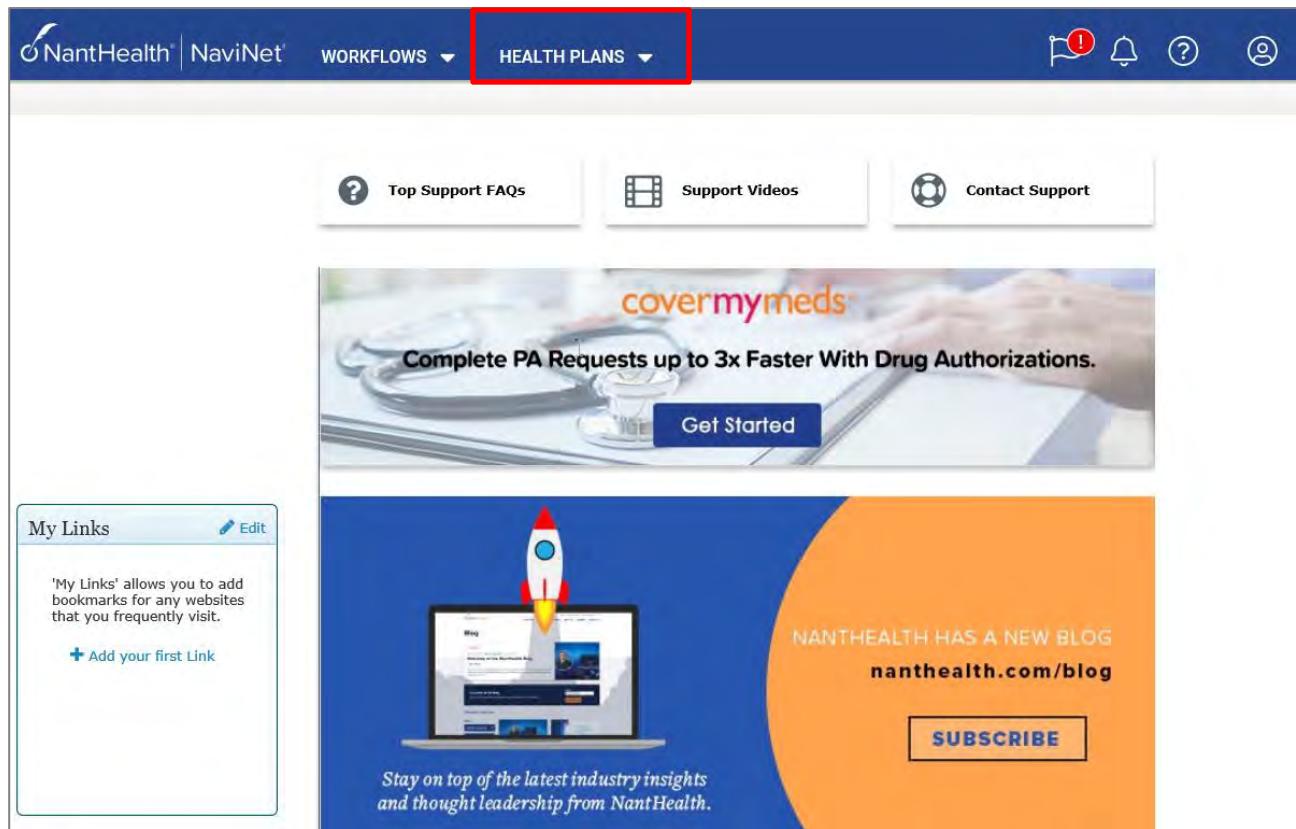
HIPAA guidelines prohibit users from sharing login information. If you are sharing login credentials, please contact your NaviNet Security Officer to be added as a user. Don't know the name of your Security Officer? Log in and go to **My Account** and click **My Security**. There is no additional charge for adding users.

Copyright © 1998-2019 NaviNet, Inc. All rights reserved. NaviNet® is a registered trademark of NaviNet, Inc.
[Terms of Use](#)

Norton SECURED
 powered by digicert

| Step | Action |
|------|---|
| 1. | Access NaviNet using the following address: https://navinet.navimedix.com |
| 2. | Enter your Username |
| 3. | Enter your Password |
| 4. | Click the Sign In button Result: <i>The NaviNet Home screen will be displayed</i> |

Logging in to Provider Portal



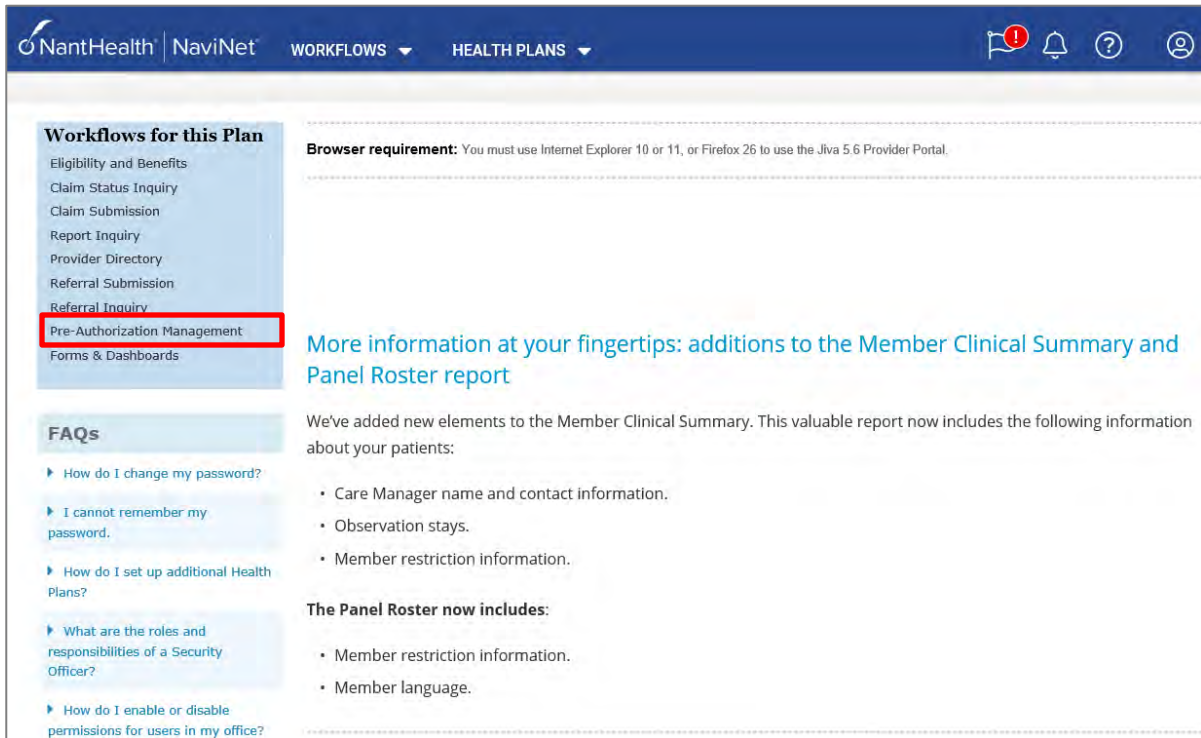
The NaviNet Home Page is not Health Plan-specific.

To locate your Health Plan:

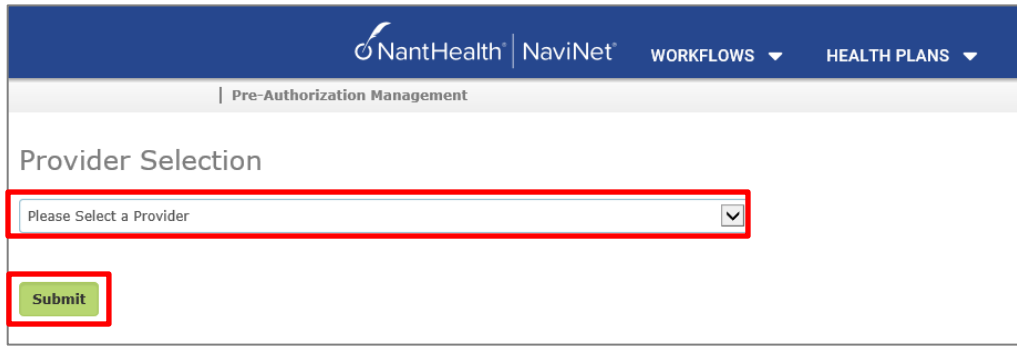
| Step | Action |
|------|---|
| 1. | Click on HEALTHPLANS in the top menu |
| 2. | Select the appropriate health plan from the drop down list |
| | Result: <i>The Health Plan-specific Home page will display</i> |

Logging in to Provider Portal

The general layout of the Health Plan Home page will be similar across all Health Plans. However, each Health Plan may have customized items on their home page, such as links available in the **Workflows for the Plan** section.



To access the Provider Portal:

| Step | Action |
|------|---|
| 1. | <p>Click on the Pre-Authorization Management link</p> <p>Result: JIVA/Provider Portal will open*</p> <p>*NOTE: Based on the Plan, there may be an additional step prior to the Provider Portal opening. The Provider Selection page may display. If it does, you would select your Provider from the drop-down menu and click on the Submit button. The Provider Portal will then open.</p>  |

Overview of the Dashboard

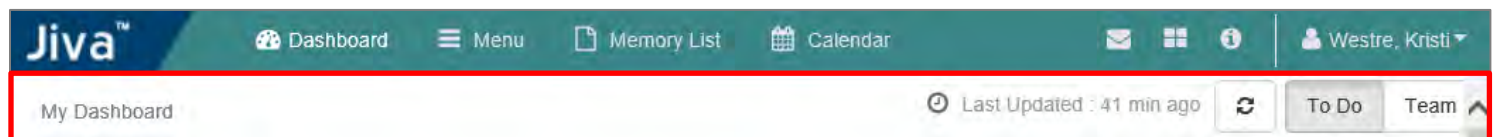
The dashboard consists of widgets (*or panels*) that help you to access the tasks that are assigned to you. It also provides high-level information about the episodes and activities assigned to you.

Application Banner



| Menu Bar | Description |
|--------------------|--|
| Dashboard | Click to return to the Dashboard from anywhere within the Provider Portal. |
| Menu | Click to access ways to search for a member. |
| Memory list | The Memory List bookmarks Add and Edit screens. It is an easy way to move back to a member or episode you worked on earlier and have not closed. |
| Calendar | The calendar will display any tasks that have been assigned to you. |
| Messaging | N/A – The messaging functionality will not be used. |
| Legend | Click to see a legend of icons that may be associated with members. |
| Jiva Help | Click to access help for the screen you are on. |
| Profile | Click to make changes to the color scheme. |

My Dashboard Banner







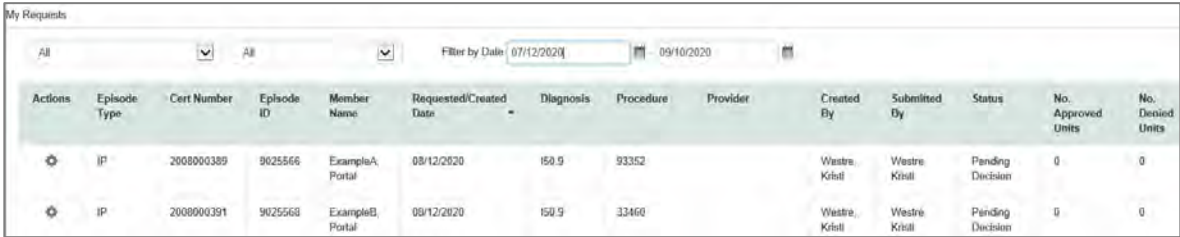
| Item | Description |
|---------------------|---|
| Last Updated | Displays the last time the Dashboard was updated |
| Refresh | Click the Refresh icon to update the Dashboard to view the most current information. |
| To Do | Displays the widgets containing information regarding episodes associated with you. |
| Team | Displays the widgets containing information regarding episodes associated with your team. |

Overview of the Dashboard: To-Do View

These widgets contain information regarding the episodes associated with you.

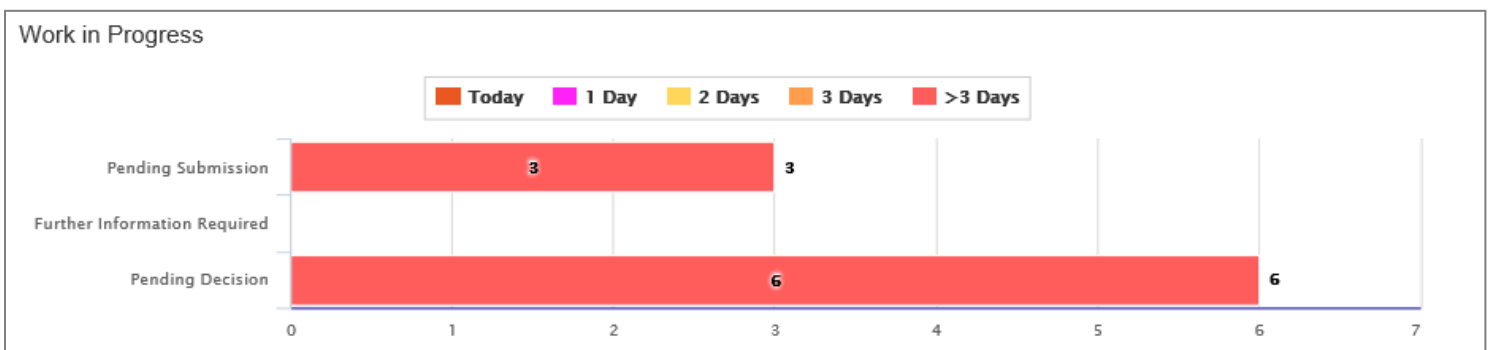
Information Widget

| |
|---|
|  0 Alerts |
|  0 Messages |
|  7 My Requests |
|  0 Gaps in Care |

| Item | Description |
|---------------------|---|
| Alerts | Displays the number of notifications or reminders of an action performed, or to be performed. Click on the hyperlink to view the alerts. |
| Messages | N/A – This functionality will not be used. |
| My Requests | <p>Displays the number of episodes that have been submitted. Click the hyperlink to view the list of requests.</p>  <p><i>Note: It does not include episodes that are pending submission.</i></p> |
| Gaps in Care | Displays any Gaps in Care for the members associated with you. |

Work in Progress Widget

You can view the request statistics by status in the Work in Progress widget. It displays the number of requests created and their statuses in a graphical representation. It also displays the number of days that a request is in the same status (color coded). Clicking on a bar in the graph will display those given episodes.



Overview of the Dashboard: To-Do View, continued

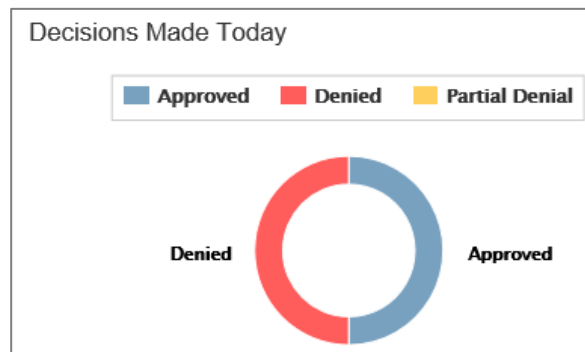
Requests by Type Widget

The Requests by Type widget displays the number of requests that are processed, pending for submission, pending for decision, and awaiting further information based on the episode types.



Decisions Made Today Widget

The Decisions Made Today widget displays the statistics of stay and service requests that are approved, denied, or partially denied pertaining to the requests made by you. Click on a status in the graph to view the associated episode(s).



My Activities Widget

The My Activities widget displays the list of activities assigned to you that are schedule to be performed on the current date, by default.

Overview of the Dashboard: Team View

The Team view will display information regarding your team.

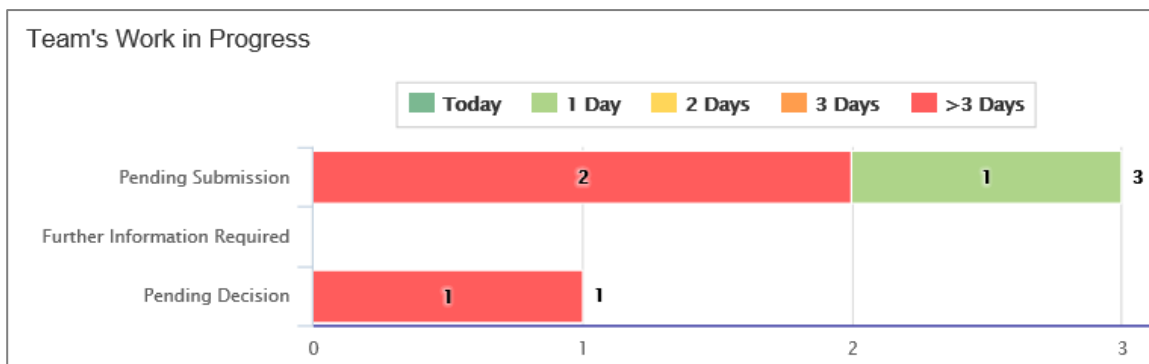
Team Members Widget

The Team Members widget displays the number of team members along with their names. You can access episodes associated with your team members by clicking on their names. This will take you to their Dashboard.



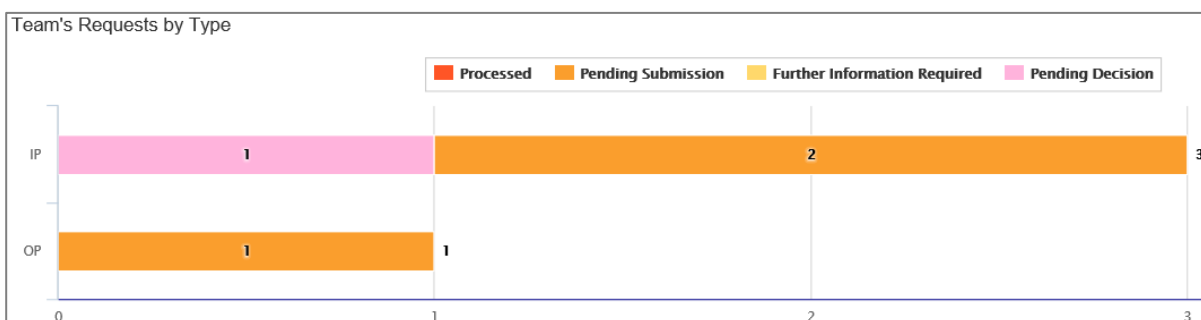
Team's Work in Progress Widget

The Team's Work in Progress widget displays the number of episodes created by your team and is displayed based on the timeline.



Team's Requests by Type Widget

The Team's Request by Type widget displays the number of requests that are processed, pending for submission, pending for decision, and awaiting further information depending on the episode types. You may click on a bar in the graph to access the specific information.




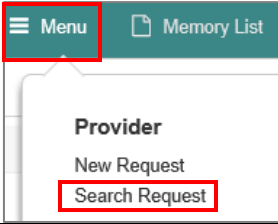


2 SEARCHING FOR A MEMBER

Searching for a Member – Search Request Tab

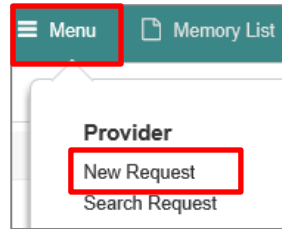
It is recommended that you search for a possible duplication before entering a request. Conducting the search using **Search Request** allows you to view existing requests for a member.

| | |
|---|--|
|  | <h3>Duplicate Case Check and Alert</h3> <ul style="list-style-type: none"> Jiva will compare dates of service, treating provider and procedure request to other cases for the member. You will receive a warning message if a possible duplicate exists. Jiva will not auto approve any case that is a possible duplicate. The request will be evaluated by the Utilization Management team. |
|---|--|


| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|----------------------|--|--------------------|--------------|-----------------|---|---|---|----------------------|--|--------------------|------------------|----------------------------|----------|-----------------|---|---------|------------------|----|------------|------------|---|----------------|----------------|--|-----------|----------|----------------------------|---|---------|------------------|----|------------|-------------|------------------------------|----------------|--|--|--------------------|--|--|
| 1. | <p>Click on Search Request on the menu bar.</p>  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. | <p>Search by one of the following:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #555; color: white;"> <th>Search Information</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Member ID</td> <td>Member ID Type: defaults to ELIG Member ID which is their health plan ID. You will need to enter -01 at the end of the Member ID</td> </tr> <tr> <td>Member Name & DOB</td> <td>You need to enter both the Member Name and DOB</td> </tr> <tr> <td>Certification Number</td> <td>If you are searching for a particular submitted or saved request, you may search by the Certification Number</td> </tr> </tbody> </table> | Search Information | Description | Member ID | Member ID Type: defaults to ELIG Member ID which is their health plan ID. You will need to enter -01 at the end of the Member ID | Member Name & DOB | You need to enter both the Member Name and DOB | Certification Number | If you are searching for a particular submitted or saved request, you may search by the Certification Number | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Search Information | Description | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Member ID | Member ID Type: defaults to ELIG Member ID which is their health plan ID. You will need to enter -01 at the end of the Member ID | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Member Name & DOB | You need to enter both the Member Name and DOB | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Certification Number | If you are searching for a particular submitted or saved request, you may search by the Certification Number | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3. | <p>Select “Cases Treated By Me” in the View Requests drop down. This will display requests associated with the selected business entity.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4. | <p>Verify that “All” is in the Business Entity field.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5. | <p>Click the Search button and check for duplicate requests.</p> <p>Result: Cases found for the specified member will be displayed in the “Request Search Results” section, along with the Add New Request button. If no matching records for the specified member are found, a message will be displayed indicating this, along with the Add New Request button.</p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #e0e0e0;"> <th>Action</th> <th>Episode ID</th> <th>Member Name</th> <th>Episode Type</th> <th>Date of Service</th> <th>Cert Number</th> <th>Diagnosis</th> <th>Created By</th> <th>Submitted By</th> <th>Initial Due Date</th> <th>Status</th> <th>Decision</th> <th>Decision Reason</th> </tr> </thead> <tbody> <tr> <td>⚙</td> <td>9025648</td> <td>ExampleA, Portal</td> <td>IP</td> <td>08/13/2020</td> <td>2008000412</td> <td>M13.169 (Monoarthritis, not elsewhere classified, unspecified knee)</td> <td>Westre, Kristi</td> <td>Westre, Kristi</td> <td></td> <td>Processed</td> <td>Approved</td> <td>Clinical Reviewer Approval</td> </tr> <tr> <td>⚙</td> <td>9026454</td> <td>ExampleA, Portal</td> <td>IP</td> <td>09/10/2020</td> <td>92009000124</td> <td>R69 (Illness, unspecified)</td> <td>Westre, Kristi</td> <td></td> <td></td> <td>Pending Submission</td> <td></td> <td></td> </tr> </tbody> </table> <p style="text-align: right; margin-top: 10px;"> Add New Request </p> | Action | Episode ID | Member Name | Episode Type | Date of Service | Cert Number | Diagnosis | Created By | Submitted By | Initial Due Date | Status | Decision | Decision Reason | ⚙ | 9025648 | ExampleA, Portal | IP | 08/13/2020 | 2008000412 | M13.169 (Monoarthritis, not elsewhere classified, unspecified knee) | Westre, Kristi | Westre, Kristi | | Processed | Approved | Clinical Reviewer Approval | ⚙ | 9026454 | ExampleA, Portal | IP | 09/10/2020 | 92009000124 | R69 (Illness, unspecified) | Westre, Kristi | | | Pending Submission | | |
| Action | Episode ID | Member Name | Episode Type | Date of Service | Cert Number | Diagnosis | Created By | Submitted By | Initial Due Date | Status | Decision | Decision Reason | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ⚙ | 9025648 | ExampleA, Portal | IP | 08/13/2020 | 2008000412 | M13.169 (Monoarthritis, not elsewhere classified, unspecified knee) | Westre, Kristi | Westre, Kristi | | Processed | Approved | Clinical Reviewer Approval | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ⚙ | 9026454 | ExampleA, Portal | IP | 09/10/2020 | 92009000124 | R69 (Illness, unspecified) | Westre, Kristi | | | Pending Submission | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Searching for a Member – New Request Tab

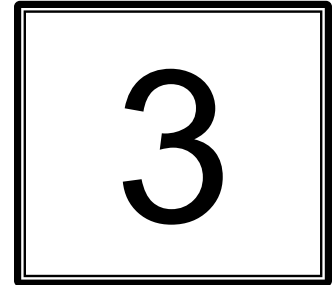
If the **Add New Request** button is not displayed after searching for a member using the **Search Request** tab, you can search for a member and add a new request using the **New Request** tab.



| Step | Action |
|------|---------------------------------------|
| 1. | Click on Menu on the menu bar. |
| 2. | Select New Request |

| Step | Action |
|------|---|
| 1. | Enter the Member ID in the Member ID field. <div style="border: 1px solid black; padding: 5px; display: inline-block;">  When searching by Member ID you must enter “-01” at the end of the Member ID. </div> |
| 2. | Click the Search button to search for the member. Result: Information for the specified member will be displayed in the Member Search Results section and the Add New Request field will be displayed in the Action column. |

| Jiva Member ID | Member Name | Member Date of Birth | Gender | Member ID | Coverage Start Date | Coverage End Date | Group Name | Action |
|----------------|------------------|----------------------|--------|-----------|---------------------|-------------------|------------|-------------|
| | ExampleA, Portal | 04/19/1966 | F | | 01/01/2004 | 12/31/9999 | | Add Request |



3 ENTER AN IP CLINICAL REQUEST

How to Enter an Inpatient Clinical Request

When entering a request you have 2 options:

- 1) Enter a clinical request which includes all clinical information.
- 2) Enter a nonclinical request where the clinical information can be added at a later time.

The steps in this chapter outline how to enter an IP clinical request. Reference chapter 4 “How to Enter an IP Non-clinical Request” and Chapter 5 “How to Add Clinical Information to an Existing IP Non-clinical Request” for more information.

When entering a **clinical** request, you **must provide** the following information:

- **Episode Details**
- **Diagnosis- primary a must, secondary is optional**
- **Treating Provider**
- **Attending Physician**
- **Add stay request**
- **Add Assessment (if triggered)**
- **All clinical information**



Requests where the clinical information is entered may auto approve based on what is requested and the information provided in the Assessment.

Adding a New IP Clinical Request – Adding Episode Details

After locating the member (following the steps outlined in Chapter 2), click on **Add New Request** and select **Inpatient** from the drop-down list.

The Member Demographics are at the top of the page. You may click the drop-down caret on the right to expand the demographics window.

The screenshot shows the Jiva portal interface. At the top, there's a navigation bar with 'Jiva' logo and links for Dashboard, Menu, Memory List, and Calendar. Below that, member information is displayed: ExampleA, Portal (Female), DOB: 04/19/1966 (54y), Member ID, and Government ID. Further down, there are fields for Address, Phone & Email, Coverage, Group, PCP/PCM, and Allergies. A red box highlights the 'Inpatient Request' section. Inside this section, there's a sub-section for 'Episode Details' with a red information icon. To the right of this are three dropdown menus: 'Request Type *', 'Request Priority *', and 'Admit Type'. Below these is a link labeled 'Optional Fields' which is circled in red.

Follow these steps to complete the **Episode Details** section:

| Step | Action |
|------|---|
| 1. | Select the appropriate Request Type from the drop down |
| 2. | Select the appropriate Request Priority from the drop down |
| 3. | Select the appropriate Admit Type from the drop down |

If you click the **Optional Fields** hyperlink, additional fields will be displayed.

This screenshot shows the 'Inpatient Request' form with the 'Optional Fields' section expanded. The 'Episode Details' section is still visible on the left. The expanded section includes the 'Request Type *', 'Request Priority *', and 'Admit Type' dropdowns. Below these, two new fields are added: 'Time Request' (a text input field) and 'Reason for Request' (a dropdown menu). These two fields are highlighted with a red box.

- **Time Request:** This field will auto-populated based on the **Request Priority**.
- **Reason for Request:** Select the appropriate reason from the drop down.

Adding a New IP Clinical Request – Adding Diagnosis

You can add multiple diagnoses from this screen or you can utilize the **Favorite Diagnosis** hyperlink to save time and keystrokes. The **Favorite Diagnosis** function will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider’s account. Reference Chapter 9 “*Favorite Diagnosis List – How to Create a Favorites List.*”

i **Diagnosis**

Code Type *

Diagnosis *


[Advanced Search](#) [Favorite Diagnosis](#)

| Step | Action | | | | | | | | | | | | |
|--|--|-----------------------------------|-----------|----------------------------------|---|--|---|-----------------------------------|--|---|-------|---------------------------|---|
| 1. | Code Type will default to ICD10. You may select a different code type if applicable. | | | | | | | | | | | | |
| 2. | Type the diagnosis or code in the Diagnosis field. You may also use the Advanced Search function, if needed. | | | | | | | | | | | | |
| 3. | Once you select the diagnosis, it will display on the screen and be attached to the episode. <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr style="background-color: #cccccc;"> <th style="width: 20%;">Primary Dx</th> <th style="width: 15%;">Code Type</th> <th style="width: 45%;">Diagnosis</th> <th style="width: 20%;">Actions</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">★</td> <td style="text-align: center;">ICD10</td> <td>I50.9--Heart failure, unspecified</td> <td></td> </tr> <tr> <td style="text-align: center;">☆</td> <td style="text-align: center;">ICD10</td> <td>R69--Illness, unspecified</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> | Primary Dx | Code Type | Diagnosis | Actions | ★ | ICD10 | I50.9--Heart failure, unspecified | | ☆ | ICD10 | R69--Illness, unspecified | - |
| Primary Dx | Code Type | Diagnosis | Actions | | | | | | | | | | |
| ★ | ICD10 | I50.9--Heart failure, unspecified | | | | | | | | | | | |
| ☆ | ICD10 | R69--Illness, unspecified | - | | | | | | | | | | |
| 4. | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #cccccc;"> <th style="width: 40%;">If you...</th> <th style="width: 60%;">Then...</th> </tr> </thead> <tbody> <tr> <td>want to add additional diagnoses</td> <td> Repeat steps 2 and 3. Note: - Click the remove icon to remove a diagnosis from the request. - You cannot remove a diagnosis unless there is more than one diagnosis already selected - Click the Star ★ in the Primary Dx column if you need to designate a different diagnosis as primary. </td> </tr> <tr> <td>do not want to add additional diagnoses</td> <td>Proceed to the Providers section of the episode.</td> </tr> </tbody> </table> | If you... | Then... | want to add additional diagnoses | Repeat steps 2 and 3. Note: - Click the remove icon to remove a diagnosis from the request. - You cannot remove a diagnosis unless there is more than one diagnosis already selected - Click the Star ★ in the Primary Dx column if you need to designate a different diagnosis as primary. | do not want to add additional diagnoses | Proceed to the Providers section of the episode. | | | | | | |
| If you... | Then... | | | | | | | | | | | | |
| want to add additional diagnoses | Repeat steps 2 and 3. Note: - Click the remove icon to remove a diagnosis from the request. - You cannot remove a diagnosis unless there is more than one diagnosis already selected - Click the Star ★ in the Primary Dx column if you need to designate a different diagnosis as primary. | | | | | | | | | | | | |
| do not want to add additional diagnoses | Proceed to the Providers section of the episode. | | | | | | | | | | | | |

Adding a New IP Clinical Request – Adding Providers

All Inpatient requests require a **Treating** provider (Facility) and an **Attending** physician.

The steps below outline the processes for adding providers to the request.

| | |
|---|--|
|  | <p>Favorite Providers - You can utilize the Favorite Providers hyperlink to save time and keystrokes. The Favorite Providers list will allow you to create and manage a list of frequently used providers. Reference Chapter 9 “<i>Favorite Provider List–How to Create a Favorites List.</i>”</p> |
|---|--|


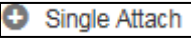

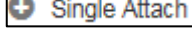
| Step | Action | | | | | | |
|----------------------------|--|----------------------------|---------|--------------|--------------------|-------------------------|---|
| 1. | <p>Click the Attach Providers button.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Provider Details <div style="border: 2px solid red; padding: 5px; background-color: #0070c0; color: white; border-radius: 5px;">Attach Providers</div> Favorite Providers </div> </div> | | | | | | |
| 2. | <p>Enter the appropriate search criteria and click on Search.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p>Attach Providers</p> <p style="background-color: #ffffcc; padding: 5px;">Enter any search criteria</p> <div style="border: 2px solid red; padding: 10px; margin: 10px 0;"> <p style="text-align: center;">LOB</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Provider Last Name / Facility <input style="width: 90%;" type="text" value="Last Name / Facility"/> <input type="button" value="Q"/></p> <p>NPIN <input style="width: 90%;" type="text"/></p> </div> <div style="width: 45%;"> <p>Provider First Name <input style="width: 90%;" type="text" value="Provider First Name"/> <input type="button" value="Q"/></p> <p>Provider ID <input style="width: 90%;" type="text"/></p> </div> </div> <p style="text-align: center; margin-top: 10px;"> <input type="button" value="Search"/> <input type="button" value="Advanced Search"/> </p> </div> <p style="margin-top: 10px; display: flex; justify-content: space-between;"> <input type="button" value="Attach"/> <input type="button" value="Cancel"/> </p> </div> | | | | | | |
| 3. | <p>After clicking Search:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">If appropriate provider...</th> <th style="text-align: center;">Then...</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Is displayed</td> <td>Proceed to Step 4.</td> </tr> <tr> <td style="text-align: center;"><i>Is not</i> displayed</td> <td> <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p style="text-align: center;">LOB</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Provider Last Name / Facility <input style="width: 90%;" type="text" value="Last Name / Facility"/> <input type="button" value="Q"/></p> <p>NPIN <input style="width: 90%;" type="text"/></p> <p>Provider Type: <input style="width: 90%;" type="text" value="--Select One--"/></p> <p>Tax ID <input style="width: 90%;" type="text"/></p> <p>City <input style="width: 90%;" type="text"/></p> <p>Provider Phone <input style="width: 90%;" type="text"/></p> </div> <div style="width: 45%;"> <p>Provider First Name <input style="width: 90%;" type="text" value="Provider First Name"/> <input type="button" value="Q"/></p> <p>Provider ID <input style="width: 90%;" type="text"/></p> <p>Specialty: <input style="width: 90%;" type="text" value="--Select One--"/></p> <p>State: <input style="width: 90%;" type="text" value="--Select One--"/></p> <p>County: <input style="width: 90%;" type="text"/></p> <p>Network: <input style="width: 90%;" type="text" value="--Select One--"/></p> </div> </div> <p style="text-align: center; margin-top: 10px;"> <input type="button" value="Search"/> <input type="button" value="Basic Search"/> </p> </div> </td> </tr> </tbody> </table> | If appropriate provider... | Then... | Is displayed | Proceed to Step 4. | <i>Is not</i> displayed | <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p style="text-align: center;">LOB</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Provider Last Name / Facility <input style="width: 90%;" type="text" value="Last Name / Facility"/> <input type="button" value="Q"/></p> <p>NPIN <input style="width: 90%;" type="text"/></p> <p>Provider Type: <input style="width: 90%;" type="text" value="--Select One--"/></p> <p>Tax ID <input style="width: 90%;" type="text"/></p> <p>City <input style="width: 90%;" type="text"/></p> <p>Provider Phone <input style="width: 90%;" type="text"/></p> </div> <div style="width: 45%;"> <p>Provider First Name <input style="width: 90%;" type="text" value="Provider First Name"/> <input type="button" value="Q"/></p> <p>Provider ID <input style="width: 90%;" type="text"/></p> <p>Specialty: <input style="width: 90%;" type="text" value="--Select One--"/></p> <p>State: <input style="width: 90%;" type="text" value="--Select One--"/></p> <p>County: <input style="width: 90%;" type="text"/></p> <p>Network: <input style="width: 90%;" type="text" value="--Select One--"/></p> </div> </div> <p style="text-align: center; margin-top: 10px;"> <input type="button" value="Search"/> <input type="button" value="Basic Search"/> </p> </div> |
| If appropriate provider... | Then... | | | | | | |
| Is displayed | Proceed to Step 4. | | | | | | |
| <i>Is not</i> displayed | <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p style="text-align: center;">LOB</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Provider Last Name / Facility <input style="width: 90%;" type="text" value="Last Name / Facility"/> <input type="button" value="Q"/></p> <p>NPIN <input style="width: 90%;" type="text"/></p> <p>Provider Type: <input style="width: 90%;" type="text" value="--Select One--"/></p> <p>Tax ID <input style="width: 90%;" type="text"/></p> <p>City <input style="width: 90%;" type="text"/></p> <p>Provider Phone <input style="width: 90%;" type="text"/></p> </div> <div style="width: 45%;"> <p>Provider First Name <input style="width: 90%;" type="text" value="Provider First Name"/> <input type="button" value="Q"/></p> <p>Provider ID <input style="width: 90%;" type="text"/></p> <p>Specialty: <input style="width: 90%;" type="text" value="--Select One--"/></p> <p>State: <input style="width: 90%;" type="text" value="--Select One--"/></p> <p>County: <input style="width: 90%;" type="text"/></p> <p>Network: <input style="width: 90%;" type="text" value="--Select One--"/></p> </div> </div> <p style="text-align: center; margin-top: 10px;"> <input type="button" value="Search"/> <input type="button" value="Basic Search"/> </p> </div> | | | | | | |

Adding a New IP Clinical Request – Adding Providers (cont.)


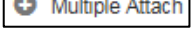

Search Results


| Provider ID | Provider Name | Location | Type | Provider Role | Partici |
|-------------|---------------|--------------|-----------------|---------------|---------|
| 0000000 | Hospital A | Any City, PA | Facility/Vendor | Treating | |

Single Attach
 Multiple Attach
 Set as Favorite

| Step | Action |
|------|--|
| 4. | <ul style="list-style-type: none"> Search for the facility. Once you have located the facility, select “Treating” from the drop-down list in the Provider Role column, click the  icon next to the provider row and select  to attach the provider to the episode. <p>Result: The Provider will be attached and listed in the Providers section of the episode.</p> |
| 5. | <ul style="list-style-type: none"> Search for the attending physician. Once you have located the physician, select “Attending” from the drop-down list in the Provider Role column, click the  icon next to the provider row and select  to attach the provider to the episode. <p>Result: The Provider will be attached and listed in the Providers section of the episode.</p> |



| If you want to ... | Then... |
|---|--|
| <p><u>Attach multiple providers to an episode at the same time</u></p> | <p>Follow the steps outlined below:</p> <ul style="list-style-type: none"> Search for the desired providers In the row of each desired provider in the search results screen, select the appropriate Provider Role from the drop-down list, click the  icon next to the row and select the  option As each provider is selected, they will be added to the “Selected Providers List” at the bottom of the screen When all providers have been added, verify the selected Provider Role and click the  button to add them to the episode. |

| Provider Details | ID | Name | Location | Role | Network | Phone | Action |
|------------------|----|------------|----------|-----------|---------|-------|---|
| | | Hospital A | | Treating | | |  |
| | | Provider A | | Attending | | |  |

NOTE:

- If the incorrect provider is attached, click the **Deactivate** icon  to deactivate the facility. The facility will be removed from the episode.

Adding a New IP Clinical Request – Adding Stay Request

You can add a Stay Request (length of stay/days in hospital) without adding a Service Request. The Service Request is used to request a surgical procedure. The following steps outline how to add the Stay Request.

| | | | | | |
|---------------------|-------------------------|----------------|-------------------|----------------------|---|
| Stay Request | Service Type * | --Select One-- | Actual Admit Date | <input type="text"/> |  |
| | Place of Service | Medical | | | |
| | Requested Level Of Care | --Select One-- | LOS Requested | <input type="text"/> | |

| Step | Action |
|------|--|
| 1. | Select the most appropriate choice in the Service Type drop down. |
| 2. | Select the most appropriate choice in the Place of Service drop down. Note - If you are uncertain, select " Medical ." |
| 3. | Select the most appropriate "type of bed or unit" in which the member was admitted in the Requested Level of Care drop down. |
| 4. | Enter the "date of admission" in the Admit Date field. |
| 5. | Enter "1" in the LOS Requested # field. |

Adding a New IP Clinical Request – Adding Service Request (if applicable)





When adding a procedure to an Inpatient request, you will need to complete the **Service Request** section.



Favorite Services - You can utilize the Favorite Services hyperlink to save time and keystrokes. The **Favorite Services** functionality will allow you to create and manage a list of frequently used services. Reference Chapter 9 “*Favorite Services List–How to Create a Favorites List.*”

| Step | Action | | | | | | | | | | | | | | | | | | | | | | |
|-------------------------|--|---------------------|---|-------------------------|---|------------------|---------------------------------------|---------------------|---|-----------------|---------------------------------------|-------------------|---|-----------------|--|-------------------|-------------------------------------|--------------------|-------------------------------------|--------------|-------------------------------------|-----------------|----------------|
| 1. | <p>Complete information in the Service Request section (<i>if applicable</i>) using the guidelines outlined below:</p> <div data-bbox="407 554 1390 968" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> </div> <table border="1" data-bbox="228 982 1565 1501"> <tr> <td>Service Type</td> <td>Defaults to Inpatient, but update as needed</td> </tr> <tr> <td>Place of Service</td> <td>Defaults to Medical, but update as needed</td> </tr> <tr> <td>Code Type</td> <td>Defaults to CPT, but update as needed</td> </tr> <tr> <td>Service Code</td> <td>Enter the requested procedure code. Note: You can type the procedure code or a description of the code. As information is typed, the auto coder will automatically display matches in the drop-down list. Select the appropriate procedure from the list. You can also use the Advanced Search link to initiate a search for the procedure code.</td> </tr> <tr> <td>Modifier</td> <td>Enter modifier details as appropriate</td> </tr> <tr> <td>Start Date</td> <td>Defaults to match the Actual Admit date, update as needed</td> </tr> <tr> <td>End Date</td> <td>Defaults to the next day, update as needed</td> </tr> </table> <p>To view these fields, you may need to click on the Optional Fields hyperlink.</p> <table border="1" data-bbox="228 1549 1565 1780"> <tr> <td>Time Frame</td> <td>Defaults to 1, but update as needed</td> </tr> <tr> <td>Time Period</td> <td>Defaults to 1, but update as needed</td> </tr> <tr> <td>Units</td> <td>Defaults to 1, but update as needed</td> </tr> <tr> <td>UCR Cost</td> <td>N/A – not used</td> </tr> </table> | Service Type | Defaults to Inpatient, but update as needed | Place of Service | Defaults to Medical, but update as needed | Code Type | Defaults to CPT, but update as needed | Service Code | Enter the requested procedure code. Note: You can type the procedure code or a description of the code. As information is typed, the auto coder will automatically display matches in the drop-down list. Select the appropriate procedure from the list. You can also use the Advanced Search link to initiate a search for the procedure code. | Modifier | Enter modifier details as appropriate | Start Date | Defaults to match the Actual Admit date, update as needed | End Date | Defaults to the next day, update as needed | Time Frame | Defaults to 1, but update as needed | Time Period | Defaults to 1, but update as needed | Units | Defaults to 1, but update as needed | UCR Cost | N/A – not used |
| Service Type | Defaults to Inpatient, but update as needed | | | | | | | | | | | | | | | | | | | | | | |
| Place of Service | Defaults to Medical, but update as needed | | | | | | | | | | | | | | | | | | | | | | |
| Code Type | Defaults to CPT, but update as needed | | | | | | | | | | | | | | | | | | | | | | |
| Service Code | Enter the requested procedure code. Note: You can type the procedure code or a description of the code. As information is typed, the auto coder will automatically display matches in the drop-down list. Select the appropriate procedure from the list. You can also use the Advanced Search link to initiate a search for the procedure code. | | | | | | | | | | | | | | | | | | | | | | |
| Modifier | Enter modifier details as appropriate | | | | | | | | | | | | | | | | | | | | | | |
| Start Date | Defaults to match the Actual Admit date, update as needed | | | | | | | | | | | | | | | | | | | | | | |
| End Date | Defaults to the next day, update as needed | | | | | | | | | | | | | | | | | | | | | | |
| Time Frame | Defaults to 1, but update as needed | | | | | | | | | | | | | | | | | | | | | | |
| Time Period | Defaults to 1, but update as needed | | | | | | | | | | | | | | | | | | | | | | |
| Units | Defaults to 1, but update as needed | | | | | | | | | | | | | | | | | | | | | | |
| UCR Cost | N/A – not used | | | | | | | | | | | | | | | | | | | | | | |

Adding a New IP Clinical Request – Adding Service Request (if applicable), cont.

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|-----------------|------------|------------|------------|--------------|------------------|---------------|--|--|--------|--------------------------|--------------|------------|------------|----------|--------------|------------------|---------------|---|--|------------|---|------------|------------|-----------|---------|--|
| 2. | <p>Click the Add button</p> <p>Result: The Service Request line will now be populated (appears below the Service Request fields)</p> <table border="1" data-bbox="233 386 1549 541"> <thead> <tr> <th colspan="9">Service Request</th> </tr> <tr> <th>Action</th> <th><input type="checkbox"/></th> <th>Service Code</th> <th>Requested#</th> <th>Start Date</th> <th>End Date</th> <th>Service Type</th> <th>Place of Service</th> <th>Review Status</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>93352(CPT)</td> <td>1</td> <td>08/12/2020</td> <td>08/13/2020</td> <td>Inpatient</td> <td>Medical</td> <td></td> </tr> </tbody> </table> <p>Note: If a Service Request was added in error or with incorrect information, you may click the  icon in the Action column to remove the given line.</p> | Service Request | | | | | | | | | Action | <input type="checkbox"/> | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | Review Status |  | | 93352(CPT) | 1 | 08/12/2020 | 08/13/2020 | Inpatient | Medical | |
| Service Request | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Action | <input type="checkbox"/> | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | Review Status | | | | | | | | | | | | | | | | | | | | |
|  | | 93352(CPT) | 1 | 08/12/2020 | 08/13/2020 | Inpatient | Medical | | | | | | | | | | | | | | | | | | | | | |
| 3. | Repeat Steps 1 and 2 to add additional services, if appropriate | | | | | | | | | | | | | | | | | | | | | | | | | | | |


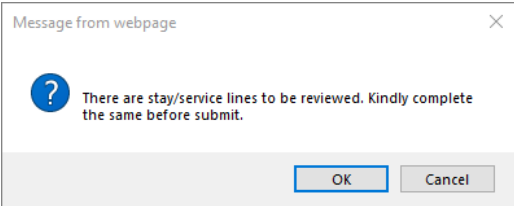
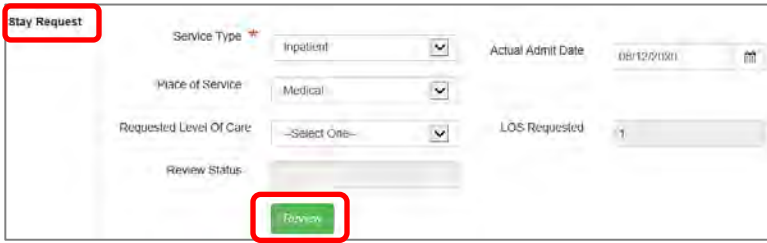

Adding a New IP Clinical Request – InterQual

Access and complete InterQual Connect Clinical Criteria




If you need training or have questions regarding the use of InterQual Connect criteria, please contact your facility InterQual trainer or contact your Change HealthCare account representative.

The health plan is certified to conduct training for internal associates only.

| Step | Action | | | | | | |
|--|---|-------|---------|----------------------------|---|--|---|
| 1. | <p>Click the Check for Review button.</p>  | | | | | | |
| 2. | <p>Once determined that one or both exists, you will receive the following pop-up message. Click OK.</p>  | | | | | | |
| 3. | <p>Click the appropriate Review button.</p> <table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Only a Stay Request</td> <td> <ul style="list-style-type: none"> Click the Review button associated with the Stay Request. </td> </tr> <tr> <td>Both Stay and Service Requests</td> <td> <ul style="list-style-type: none"> The Review button associated with the Stay Request will be inactive. Click the Review button associated with the Service Request. </td> </tr> </tbody> </table>   | If... | Then... | Only a Stay Request | <ul style="list-style-type: none"> Click the Review button associated with the Stay Request. | Both Stay and Service Requests | <ul style="list-style-type: none"> The Review button associated with the Stay Request will be inactive. Click the Review button associated with the Service Request. |
| If... | Then... | | | | | | |
| Only a Stay Request | <ul style="list-style-type: none"> Click the Review button associated with the Stay Request. | | | | | | |
| Both Stay and Service Requests | <ul style="list-style-type: none"> The Review button associated with the Stay Request will be inactive. Click the Review button associated with the Service Request. | | | | | | |

Adding a New IP Clinical Request – InterQual, cont.

| Step | Action | | | | | | |
|-------------------------------------|--|----------------|---------|----------------------------------|--|-------------------------------------|---|
| 4. | <p>You will receive the following message. Click OK <i>only</i> if you completed the items listed.</p> <div data-bbox="240 304 906 562" style="border: 1px solid gray; padding: 5px;"> <p>Message from webpage ✕</p> <p> Click OK only after all diagnoses, stay and/or service detail lines are completed. Edits are not permitted after clicking OK. Click Cancel to edit or OK to continue.</p> <p style="text-align: right;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div> <p>Result: The system will run a diagnostic review of the request to determine if a Stay Request and/or a Service Request is associated with it.</p> | | | | | | |
| 5. | <p>The system will connect with InterQual and determine if there is a matching guideline.</p> <table border="1" data-bbox="240 758 1552 1497"> <thead> <tr> <th data-bbox="240 758 581 800">If there is...</th> <th data-bbox="581 758 1552 800">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 800 581 1171"> <p>Matching Guideline</p> </td> <td data-bbox="581 800 1552 1171"> <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. Proceed to Step 6 in this section.</p> <div data-bbox="597 890 1240 1163" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="I50.9, G0493"/></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q & A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q & A</p> <p style="text-align: right;"> <input type="button" value="Ok"/> <input type="button" value="Cancel"/> </p> </div> </td> </tr> <tr> <td data-bbox="240 1171 581 1497"> <p>No Matching Guideline</p> </td> <td data-bbox="581 1171 1552 1497"> <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. Proceed to Adding Documents.</p> <div data-bbox="597 1262 1248 1488" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline ✕</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="J40"/></p> <p>Guideline : No matching guideline was found.</p> <p style="text-align: right;"> <input type="button" value="Ok"/> <input type="button" value="Cancel"/> </p> </div> </td> </tr> </tbody> </table> | If there is... | Then... | <p>Matching Guideline</p> | <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. Proceed to Step 6 in this section.</p> <div data-bbox="597 890 1240 1163" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="I50.9, G0493"/></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q & A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q & A</p> <p style="text-align: right;"> <input type="button" value="Ok"/> <input type="button" value="Cancel"/> </p> </div> | <p>No Matching Guideline</p> | <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. Proceed to Adding Documents.</p> <div data-bbox="597 1262 1248 1488" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline ✕</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="J40"/></p> <p>Guideline : No matching guideline was found.</p> <p style="text-align: right;"> <input type="button" value="Ok"/> <input type="button" value="Cancel"/> </p> </div> |
| If there is... | Then... | | | | | | |
| <p>Matching Guideline</p> | <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. Proceed to Step 6 in this section.</p> <div data-bbox="597 890 1240 1163" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="I50.9, G0493"/></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q & A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q & A</p> <p style="text-align: right;"> <input type="button" value="Ok"/> <input type="button" value="Cancel"/> </p> </div> | | | | | | |
| <p>No Matching Guideline</p> | <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. Proceed to Adding Documents.</p> <div data-bbox="597 1262 1248 1488" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline ✕</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="J40"/></p> <p>Guideline : No matching guideline was found.</p> <p style="text-align: right;"> <input type="button" value="Ok"/> <input type="button" value="Cancel"/> </p> </div> | | | | | | |

Adding a New IP Clinical Request – InterQual, cont.

| Step | Action | | | | | | |
|-----------------|---|-----------------|---------|-------------|--|-----------------|---|
| 6. | After answering the review questions, the Recommendations page will display either Criteria Met or Criteria Not Met . | | | | | | |
| 7. | From the Recommendations page: <table border="1" data-bbox="240 422 1555 590"> <thead> <tr> <th data-bbox="240 422 440 464">If you click...</th> <th data-bbox="440 422 1555 464">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 464 440 506">Save</td> <td data-bbox="440 464 1555 506">The review will be saved and can be updated, if needed, prior to submitting the request.</td> </tr> <tr> <td data-bbox="240 506 440 590">Complete</td> <td data-bbox="440 506 1555 590">The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td> </tr> </tbody> </table> | If you click... | Then... | Save | The review will be saved and can be updated, if needed, prior to submitting the request. | Complete | The review will be saved and closed. It cannot be updated even if you have not yet submitted the request. |
| If you click... | Then... | | | | | | |
| Save | The review will be saved and can be updated, if needed, prior to submitting the request. | | | | | | |
| Complete | The review will be saved and closed. It cannot be updated even if you have not yet submitted the request. | | | | | | |
| 8. | Close the InterQual tab to return to the Provider Portal | | | | | | |
| 9. | The request line will now display a status in the Decision column. | | | | | | |

Adding a New IP Clinical Request – Adding Assessments

If an assessment is associated with the request, an **Assessment** section will be displayed where you may access and complete the associated assessment.

| Step | Action |
|------|--|
| 1. | In the New Tab of the Assessment section, click on the gear icon to the left of the Assessment and click on Start . |
| 2. | Answer the questions. Note - Questions in red are mandatory. |
| 3. | Click the Complete button to complete the assessment. Note - This will trigger any auto approval rules (if configured.) The Save button will not trigger the auto approval rules. |

Adding a New IP Clinical Request – Adding Documents

When submitting an **IP Clinical Request**, you must attach the clinical information. Follow these instructions to add a **Documents**.

| Step | Action | | | | | | | | | | | | |
|------------------|---|----------------------|---|----------------------|---|---------------|---|--|--|-----------------|---|--|--|
| 1. | <p>Complete the following:</p> <ol style="list-style-type: none">Document Title: enter the title of the documentDocument Type: defaults to Medical Document, update as needed.Document Description: optional fieldClick the Browse button to search for the document you wish to upload<ol style="list-style-type: none">Click the desired document and click the Open buttonYou will see the document name listed next to the Browse button. <div data-bbox="289 697 1479 869"><p>Documents</p><table><tr><td>Document Title *</td><td><input type="text" value="Clinical Information"/></td><td>Document Description</td><td><input type="text" value="Can enter a document description here."/></td></tr><tr><td>Document Type</td><td><input type="text" value="Medical Document"/> ▼</td><td></td><td></td></tr><tr><td>Select Document</td><td><input type="button" value="Browse"/> PP Example Document.docx</td><td></td><td></td></tr></table></div> | Document Title * | <input type="text" value="Clinical Information"/> | Document Description | <input type="text" value="Can enter a document description here."/> | Document Type | <input type="text" value="Medical Document"/> ▼ | | | Select Document | <input type="button" value="Browse"/> PP Example Document.docx | | |
| Document Title * | <input type="text" value="Clinical Information"/> | Document Description | <input type="text" value="Can enter a document description here."/> | | | | | | | | | | |
| Document Type | <input type="text" value="Medical Document"/> ▼ | | | | | | | | | | | | |
| Select Document | <input type="button" value="Browse"/> PP Example Document.docx | | | | | | | | | | | | |

Adding a New IP Clinical Request – Adding Notes

Notes

Note Type: --Select One--

Note Encounter Date: 08/13/2020

Note Encounter Time: 08 49

Note Text

File Edit View Format Tools

B *I* U ABC ✓

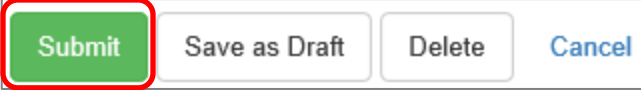
| Step | Action |
|------|--|
| 1. | Select the appropriate Note Type from the drop-down menu. |
| 2. | Enter the appropriate notes in the notes section. Be sure to include your name and contact information in the event the Plan needs to contact you. |



This is a shared note field. Notes can be viewed and entered by both you and the plan.

Adding a New IP Clinical Request – Submitting the Request

Once all required sections are completed, you are ready to submit the request.

| Step | Action |
|------|--|
| 1. | <p>Click on the Submit button to submit your request.</p>  <p>Note: The Submit button will not be active until a clinical review has been completed.</p> |
| 2. | <p>The Request Details information will be displayed, including the Cert Number.</p> <p>Note: If the request is programmed to auto-approve, you will see Approved in the Decision column.</p> |

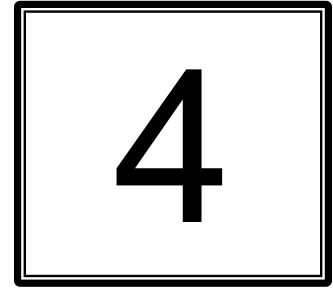
Request Details

Episode Abstract

Expected Decision Date : 08/15/2020 Authorization Type : IP Episode Number : 9025648 Episode Status : OpenRequest **Cert Number 2008000412**

| Stay Request | Stay ID | LOS Requested# | LOS Assigned# | LOS Denied | Auth Start Date | Auth End Date | Service Type | Decision |
|--------------|----------|----------------|---------------|------------|-----------------|---------------|--------------|----------|
| | 12548537 | 1 | 0 | 0 | 08/17/2020 | 08/18/2020 | Inpatient | - |

| Authorization Details | Service ID | Service Code | Requested # | Assigned # | Denied | Auth Start Date | Auth End Date | Service Type | Frequency | Decision |
|-----------------------|------------|--------------|-------------|------------|--------|-----------------|---------------|--------------|-----------|----------------|
| | 12548538 | 27428(CPT) | 1 | 0 | 0 | | | Inpatient | Per Day | Pending |



4 ENTER AN IP NON-CLINICAL REQUEST

How to Enter an Inpatient Non-Clinical Request

A non-clinical request can be started by non-clinical staff or anyone who does not have clinical information available at the time of entry.

The non-clinical request can be saved and is available to access at a later time in order to add clinical data.

When entering a **non-clinical** request, you **must provide** the following information:

- **Episode Details**
- **Diagnosis- primary a must, secondary is optional**
- **Treating Provider**
- **Attending Physician**
- **Add stay request**

Adding a New IP Non-Clinical Request – Adding Episode Details

After locating the member (following the steps outlined in Chapter 2), click on **Add New Request** and select **Inpatient** from the drop-down list.

The Member Demographics are at the top of the page. You may click the drop-down caret on the right to expand the demographics window.

The screenshot shows the Jiva portal interface. At the top, there's a navigation bar with 'Jiva' logo and links for Dashboard, Menu, Memory List, and Calendar. Below that, member information is displayed: ExampleA, Portal (Female), DOB: 04/19/1966 (54y), Member ID, and Government ID. Further down, there are fields for Address, Phone & Email, Coverage, Group, PCP/PCM, and Allergies. A red circle highlights a drop-down caret on the right side of the member information section. Below this, the 'Inpatient Request' form is visible. The 'Episode Details' section is highlighted with a red box. It contains three dropdown menus: 'Request Type *', 'Request Priority *', and 'Admit Type'. A red circle highlights the 'Optional Fields' link below these dropdowns.

Follow these steps to complete the **Episode Details** section:

| Step | Action |
|------|---|
| 1. | Select the appropriate Request Type from the drop down |
| 2. | Select the appropriate Request Priority from the drop down |
| 3. | Select the appropriate Admit Type from the drop down |

If you click the **Optional Fields** hyperlink, additional fields will be displayed.

This screenshot shows the 'Inpatient Request' form with the 'Optional Fields' section expanded. The 'Episode Details' section is highlighted with a red box. It contains three dropdown menus: 'Request Type *', 'Request Priority *', and 'Admit Type'. Below these, the 'Optional Fields' section is expanded, showing two new fields: 'Time Request' (a text input field) and 'Reason for Request' (a dropdown menu). A red box highlights these two fields.

- **Time Request:** This field will auto-populated based on the **Request Priority**.
- **Reason for Request:** Select the appropriate reason from the drop down.

Adding a New IP Non-Clinical Request – Adding Diagnosis

You can add multiple diagnoses from this screen or you can utilize the **Favorite Diagnosis** hyperlink to save time and keystrokes. The **Favorite Diagnosis** function will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider’s account. Reference Chapter 9 “*Favorite Diagnosis List – How to Create a Favorites List.*”

i **Diagnosis**

Code Type *

Diagnosis *

[Advanced Search](#) [Favorite Diagnosis](#)

| Step | Action | | | | | | | | | | | | |
|--|---|-----------------------------------|-----------|----------------------------------|--|--|---|-----------------------------------|--|---|-------|---------------------------|---|
| 1. | Code Type will default to ICD10. You may select a different code type if applicable. | | | | | | | | | | | | |
| 2. | Type the diagnosis or code in the Diagnosis field. You may also use the Advanced Search function, if needed. | | | | | | | | | | | | |
| 3. | Once you select the diagnosis, it will display on the screen and be attached to the episode. <table border="1" style="margin: 10px auto; width: 80%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="width: 20%;">Primary Dx</th> <th style="width: 15%;">Code Type</th> <th style="width: 45%;">Diagnosis</th> <th style="width: 20%;">Actions</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">★</td> <td style="text-align: center;">ICD10</td> <td>I50.9--Heart failure, unspecified</td> <td></td> </tr> <tr> <td style="text-align: center;">☆</td> <td style="text-align: center;">ICD10</td> <td>R69--Illness, unspecified</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> | Primary Dx | Code Type | Diagnosis | Actions | ★ | ICD10 | I50.9--Heart failure, unspecified | | ☆ | ICD10 | R69--Illness, unspecified | - |
| Primary Dx | Code Type | Diagnosis | Actions | | | | | | | | | | |
| ★ | ICD10 | I50.9--Heart failure, unspecified | | | | | | | | | | | |
| ☆ | ICD10 | R69--Illness, unspecified | - | | | | | | | | | | |
| 4. | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #808080; color: white;"> <th style="width: 40%;">If you...</th> <th style="width: 60%;">Then...</th> </tr> </thead> <tbody> <tr> <td>want to add additional diagnoses</td> <td> Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon to remove a diagnosis from the request. - You cannot remove a diagnosis unless there is more than one diagnosis already selected - Click the Star ★ in the Primary Dx column if you need to designate a different diagnosis as primary. </td> </tr> <tr> <td>do not want to add additional diagnoses</td> <td>Proceed to the Providers section of the episode.</td> </tr> </tbody> </table> | If you... | Then... | want to add additional diagnoses | Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon to remove a diagnosis from the request. - You cannot remove a diagnosis unless there is more than one diagnosis already selected - Click the Star ★ in the Primary Dx column if you need to designate a different diagnosis as primary. | do not want to add additional diagnoses | Proceed to the Providers section of the episode. | | | | | | |
| If you... | Then... | | | | | | | | | | | | |
| want to add additional diagnoses | Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon to remove a diagnosis from the request. - You cannot remove a diagnosis unless there is more than one diagnosis already selected - Click the Star ★ in the Primary Dx column if you need to designate a different diagnosis as primary. | | | | | | | | | | | | |
| do not want to add additional diagnoses | Proceed to the Providers section of the episode. | | | | | | | | | | | | |

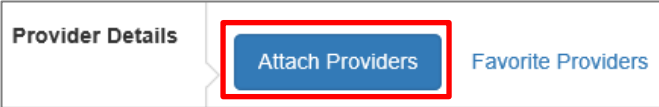
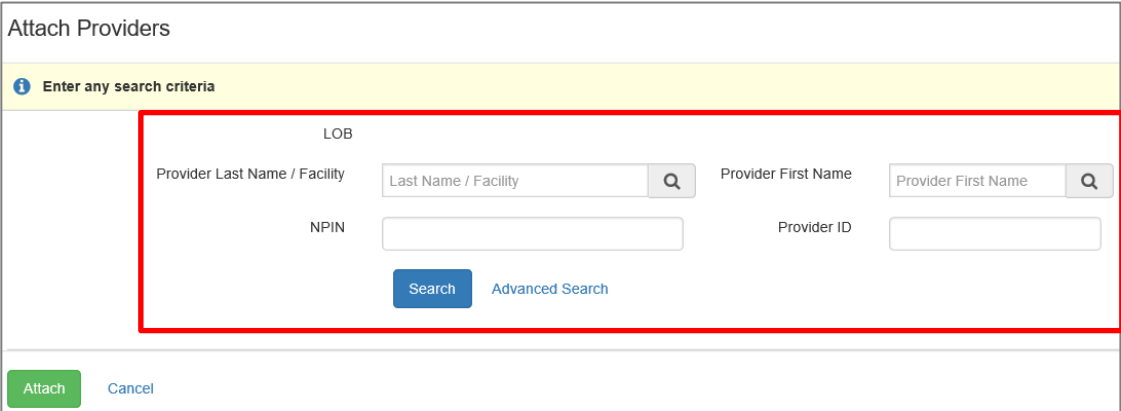
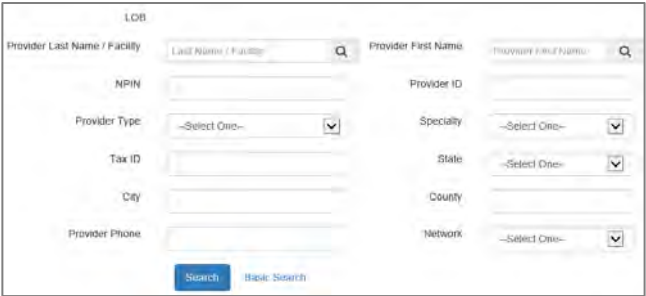
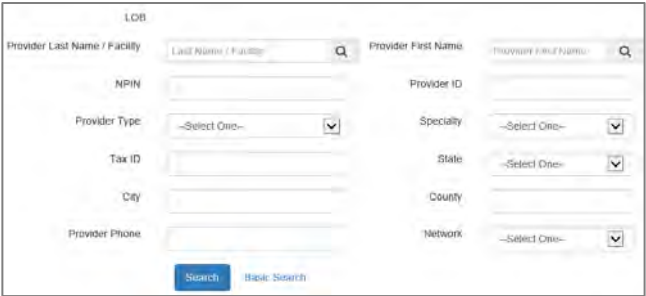
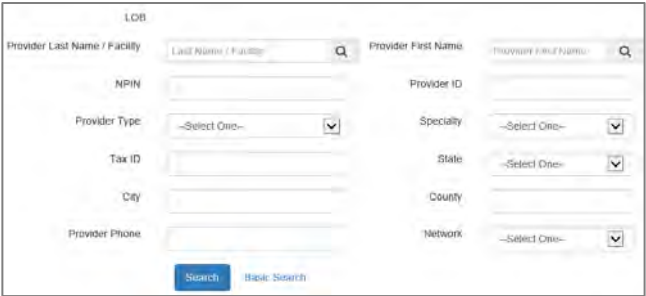
Adding a New IP Non-Clinical Request – Adding Providers

All Inpatient requests require a **Treating** provider (Facility) and an **Attending** physician.

The steps below outline the processes for adding providers to the request.



Favorite Providers - You can utilize the Favorite Providers hyperlink to save time and keystrokes. The **Favorite Providers** list will allow you to create and manage a list of frequently used providers. Reference Chapter 9 “*Favorite Providers List–How to Create a Favorites List.*”


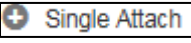

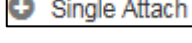
| Step | Action | | | | | | |
|----------------------------|--|----------------------------|---------|--------------|--------------------------------|-------------------------|---|
| 1. | <p>Click the Attach Providers button.</p>  | | | | | | |
| 2. | <p>Enter the appropriate search criteria and click on Search.</p>  | | | | | | |
| 3. | <p>After clicking Search:</p> <table border="1" data-bbox="354 1318 1463 1839"> <thead> <tr> <th data-bbox="354 1318 712 1377">If appropriate provider...</th> <th data-bbox="712 1318 1463 1377">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="354 1377 712 1436">Is displayed</td> <td data-bbox="712 1377 1463 1436">Click the Attach button</td> </tr> <tr> <td data-bbox="354 1436 712 1839"><i>Is not</i> displayed</td> <td data-bbox="712 1436 1463 1839"> <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p>  </td> </tr> </tbody> </table> | If appropriate provider... | Then... | Is displayed | Click the Attach button | <i>Is not</i> displayed | <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p>  |
| If appropriate provider... | Then... | | | | | | |
| Is displayed | Click the Attach button | | | | | | |
| <i>Is not</i> displayed | <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p>  | | | | | | |

Adding a New IP Non-Clinical Request – Adding Providers (cont.)


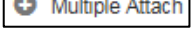

Search Results


| Provider ID | Provider Name | Location | Type | Provider Role | Partici |
|-------------|---------------|--------------|-----------------|---------------|---------|
| 0000000 | Hospital A | Any City, PA | Facility/Vendor | Treating | |

Single Attach
 Multiple Attach
 Set as Favorite

| Step | Action |
|------|--|
| 4. | <ul style="list-style-type: none"> Search for the facility. Once you have located the facility, select “Treating” from the drop-down list in the Provider Role column, click the  icon next to the provider row and select  to attach the provider to the episode. <p>Result: The Provider will be attached and listed in the Providers section of the episode.</p> |
| 5. | <ul style="list-style-type: none"> Search for the attending physician. Once you have located the physician, select “Attending” from the drop-down list in the Provider Role column, click the  icon next to the provider row and select  to attach the provider to the episode. <p>Result: The Provider will be attached and listed in the Providers section of the episode.</p> |



| If you want to ... | Then... |
|---|--|
| <p><u>Attach multiple providers to an episode at the same time</u></p> | <p>Follow the steps outlined below:</p> <ul style="list-style-type: none"> Search for the desired providers In the row of each desired provider in the search results screen, select the appropriate Provider Role from the drop-down list, click the  icon next to the row and select the  option As each provider is selected, they will be added to the “Selected Providers List” at the bottom of the screen When all providers have been added, verify the selected Provider Role and click the  button to add them to the episode. |

| Provider Details | ID | Name | Location | Role | Network | Phone | Action |
|------------------|----|------------|----------|-----------|---------|-------|---|
| | | Hospital A | | Treating | | |  |
| | | Provider A | | Attending | | |  |

NOTE:

- If the incorrect provider is attached, click the **Deactivate** icon  to deactivate the facility. The facility will be removed from the episode.

Adding a New IP Non-Clinical Request – Stay Request

You can add a Stay Request (length of stay/days in hospital) without adding a Service Request. The Service Request is used to request a surgical procedure. The following steps outline how to add the Stay Request.

| | | | | |
|---------------------|-------------------------|----------------|-------------------|----------------------|
| Stay Request | Service Type * | --Select One-- | Actual Admit Date | <input type="text"/> |
| | Place of Service | Medical | | <input type="text"/> |
| | Requested Level Of Care | --Select One-- | LOS Requested | <input type="text"/> |

| Step | Action |
|------|--|
| 1. | Select the most appropriate choice in the Service Type drop down. |
| 2. | Select the most appropriate choice in the Place of Service drop down. Note - If you are uncertain, select " Medical ." |
| 3. | Select the most appropriate "type of bed or unit" in which the member was admitted in the Requested Level of Care drop down. |
| 4. | Enter the "date of admission" in the Admit Date field. |
| 5. | Enter "1" in the LOS Requested # field. |

Adding a New IP Non-Clinical Request – Adding Service Request (if applicable)





When adding a procedure to an Inpatient request, you will need to complete the **Service Request** section.



Favorite Services - You can utilize the Favorite Services hyperlink to save time and keystrokes. The **Favorite Services** list will allow you to create and manage a list of frequently used services. Reference Chapter 9 “*Favorite Services List–How to Create a Favorites List.*”

| Step | Action | | | | | | | | | | | | | | | | | | | | | | |
|-------------------------|--|---------------------|---|-------------------------|---|------------------|---------------------------------------|---------------------|---|-----------------|---------------------------------------|-------------------|---|-----------------|--|-------------------|-------------------------------------|--------------------|-------------------------------------|--------------|-------------------------------------|-----------------|----------------|
| 1. | <p>Complete information in the Service Request section (<i>if applicable</i>) using the guidelines outlined below:</p> <div data-bbox="404 571 1380 987" data-label="Form"> <p>The screenshot shows a 'Service Request' form with the following fields: Service Type (Inpatient), Place of Service (Medical), Code Type (CPT), Service Code (Search: Service Code), Modifier (Search Modifier), Start Date (08/12/2020), End Date (08/13/2020), UCR Cost (\$), Units (1), Time Frame (Per Day), Time period (1), and Requested # (1). There are links for 'Advanced Search' and 'Favorite Services', and a red box highlights the 'Optional Fields' link. An 'Add' button is at the bottom.</p> </div> <table border="1"> <tr> <td>Service Type</td> <td>Defaults to Inpatient, but update as needed</td> </tr> <tr> <td>Place of Service</td> <td>Defaults to Medical, but update as needed</td> </tr> <tr> <td>Code Type</td> <td>Defaults to CPT, but update as needed</td> </tr> <tr> <td>Service Code</td> <td>Enter the requested procedure code. Note: You can type the procedure code or a description of the code. As information is typed, the auto coder will automatically display matches in the drop-down list. Select the appropriate procedure from the list. You can also use the Advanced Search link to initiate a search for the procedure code.</td> </tr> <tr> <td>Modifier</td> <td>Enter modifier details as appropriate</td> </tr> <tr> <td>Start Date</td> <td>Defaults to match the Actual Admit date, update as needed</td> </tr> <tr> <td>End Date</td> <td>Defaults to the next day, update as needed</td> </tr> </table> <p>To view these fields, you may need to click on the Optional Fields hyperlink.</p> <table border="1"> <tr> <td>Time Frame</td> <td>Defaults to 1, but update as needed</td> </tr> <tr> <td>Time Period</td> <td>Defaults to 1, but update as needed</td> </tr> <tr> <td>Units</td> <td>Defaults to 1, but update as needed</td> </tr> <tr> <td>UCR Cost</td> <td>N/A – not used</td> </tr> </table> | Service Type | Defaults to Inpatient, but update as needed | Place of Service | Defaults to Medical, but update as needed | Code Type | Defaults to CPT, but update as needed | Service Code | Enter the requested procedure code. Note: You can type the procedure code or a description of the code. As information is typed, the auto coder will automatically display matches in the drop-down list. Select the appropriate procedure from the list. You can also use the Advanced Search link to initiate a search for the procedure code. | Modifier | Enter modifier details as appropriate | Start Date | Defaults to match the Actual Admit date, update as needed | End Date | Defaults to the next day, update as needed | Time Frame | Defaults to 1, but update as needed | Time Period | Defaults to 1, but update as needed | Units | Defaults to 1, but update as needed | UCR Cost | N/A – not used |
| Service Type | Defaults to Inpatient, but update as needed | | | | | | | | | | | | | | | | | | | | | | |
| Place of Service | Defaults to Medical, but update as needed | | | | | | | | | | | | | | | | | | | | | | |
| Code Type | Defaults to CPT, but update as needed | | | | | | | | | | | | | | | | | | | | | | |
| Service Code | Enter the requested procedure code. Note: You can type the procedure code or a description of the code. As information is typed, the auto coder will automatically display matches in the drop-down list. Select the appropriate procedure from the list. You can also use the Advanced Search link to initiate a search for the procedure code. | | | | | | | | | | | | | | | | | | | | | | |
| Modifier | Enter modifier details as appropriate | | | | | | | | | | | | | | | | | | | | | | |
| Start Date | Defaults to match the Actual Admit date, update as needed | | | | | | | | | | | | | | | | | | | | | | |
| End Date | Defaults to the next day, update as needed | | | | | | | | | | | | | | | | | | | | | | |
| Time Frame | Defaults to 1, but update as needed | | | | | | | | | | | | | | | | | | | | | | |
| Time Period | Defaults to 1, but update as needed | | | | | | | | | | | | | | | | | | | | | | |
| Units | Defaults to 1, but update as needed | | | | | | | | | | | | | | | | | | | | | | |
| UCR Cost | N/A – not used | | | | | | | | | | | | | | | | | | | | | | |

Adding a New IP Non-Clinical Request–Adding Service Request (if appl), cont.

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|-----------------|------------|------------|------------|--------------|------------------|---------------|--|--|--------|--------------------------|--------------|------------|------------|----------|--------------|------------------|---------------|---|--|------------|---|------------|------------|-----------|---------|--|
| 2. | <p>Click the Add button</p> <p>Result: The Service Request line will now be populated (appears below the Service Request fields)</p> <table border="1" data-bbox="233 386 1549 541"> <thead> <tr> <th colspan="9">Service Request</th> </tr> <tr> <th>Action</th> <th><input type="checkbox"/></th> <th>Service Code</th> <th>Requested#</th> <th>Start Date</th> <th>End Date</th> <th>Service Type</th> <th>Place of Service</th> <th>Review Status</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>93352(CPT)</td> <td>1</td> <td>08/12/2020</td> <td>08/13/2020</td> <td>Inpatient</td> <td>Medical</td> <td></td> </tr> </tbody> </table> <p>Note: If a Service Request was added in error or with incorrect information, you may click the  icon in the Action column to remove the given line.</p> | Service Request | | | | | | | | | Action | <input type="checkbox"/> | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | Review Status |  | | 93352(CPT) | 1 | 08/12/2020 | 08/13/2020 | Inpatient | Medical | |
| Service Request | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Action | <input type="checkbox"/> | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | Review Status | | | | | | | | | | | | | | | | | | | | |
|  | | 93352(CPT) | 1 | 08/12/2020 | 08/13/2020 | Inpatient | Medical | | | | | | | | | | | | | | | | | | | | | |
| 3. | Repeat Steps 1 and 2 to add additional services, if appropriate | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Adding a New IP Non-Clinical Request – Adding Documents

Follow these instructions to add a **Documents**.

| Step | Action | | | | | | | | | | | | |
|------------------|---|----------------------|---|----------------------|---|---------------|---|--|--|-----------------|---|--|--|
| 1. | <p>Complete the following:</p> <ol style="list-style-type: none">Document Title: enter the title of the documentDocument Type: defaults to Medical Document, update as needed.Document Description: optional fieldClick the Browse button to search for the document you wish to upload<ol style="list-style-type: none">Click the desired document and click the Open buttonYou will see the document name listed next to the Browse button. <div data-bbox="290 659 1479 831"><p>Documents</p><table><tr><td>Document Title *</td><td><input type="text" value="Clinical Information"/></td><td>Document Description</td><td><input type="text" value="Can enter a document description here."/></td></tr><tr><td>Document Type</td><td><input type="text" value="Medical Document"/> ▼</td><td></td><td></td></tr><tr><td>Select Document</td><td><input type="button" value="Browse"/> <input type="text" value="PP Example Document.docx"/></td><td></td><td></td></tr></table></div> | Document Title * | <input type="text" value="Clinical Information"/> | Document Description | <input type="text" value="Can enter a document description here."/> | Document Type | <input type="text" value="Medical Document"/> ▼ | | | Select Document | <input type="button" value="Browse"/> <input type="text" value="PP Example Document.docx"/> | | |
| Document Title * | <input type="text" value="Clinical Information"/> | Document Description | <input type="text" value="Can enter a document description here."/> | | | | | | | | | | |
| Document Type | <input type="text" value="Medical Document"/> ▼ | | | | | | | | | | | | |
| Select Document | <input type="button" value="Browse"/> <input type="text" value="PP Example Document.docx"/> | | | | | | | | | | | | |

Adding a New IP Non-Clinical Request – Adding Notes

Notes

Note Type:

Note Encounter Date:

Note Encounter Time:

Note Text:

File ▾ Edit ▾ View ▾ Format ▾ Tools ▾

B *I* U ABC



| Step | Action |
|------|--|
| 1. | Select the appropriate Note Type from the drop-down menu. |
| 2. | Enter the appropriate notes in the notes section. Be sure to include your name and contact information in the event the Plan needs to contact you. |

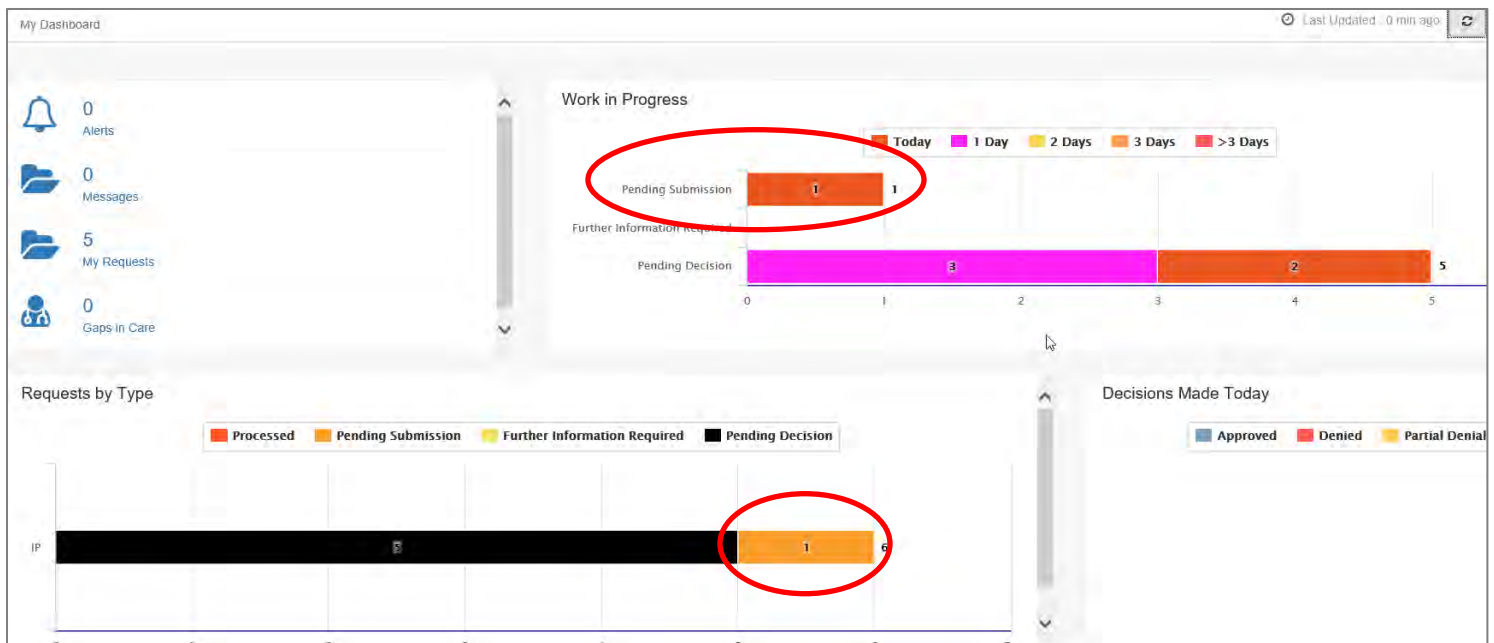


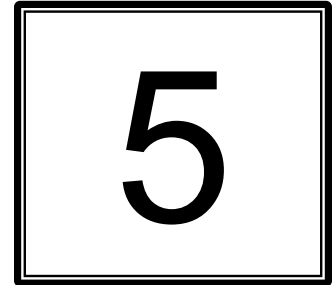
This is a shared note field. Notes can be viewed and entered by both you and the Plan.

Adding a New IP Non-Clinical Request – Save as Draft

The **Non-clinical** request must be saved so it is available to access at a later time in order to add clinical data.

| Step | Action |
|------|---|
| 1. | <p>Click on the Save as Draft button to save your request.</p>  <p>Note: The Submit button will not be active until a clinical review has been completed.</p> |
| 2. | <p>You will be taken to the top of the request where you will see that it is now in Draft status (upper left corner).</p>  |
| 3. | <p>You may click on Dashboard to exit the request where you see the request displayed as Pending Submission in the Work in Progress and Requests by Type widgets.</p> |



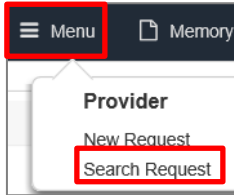
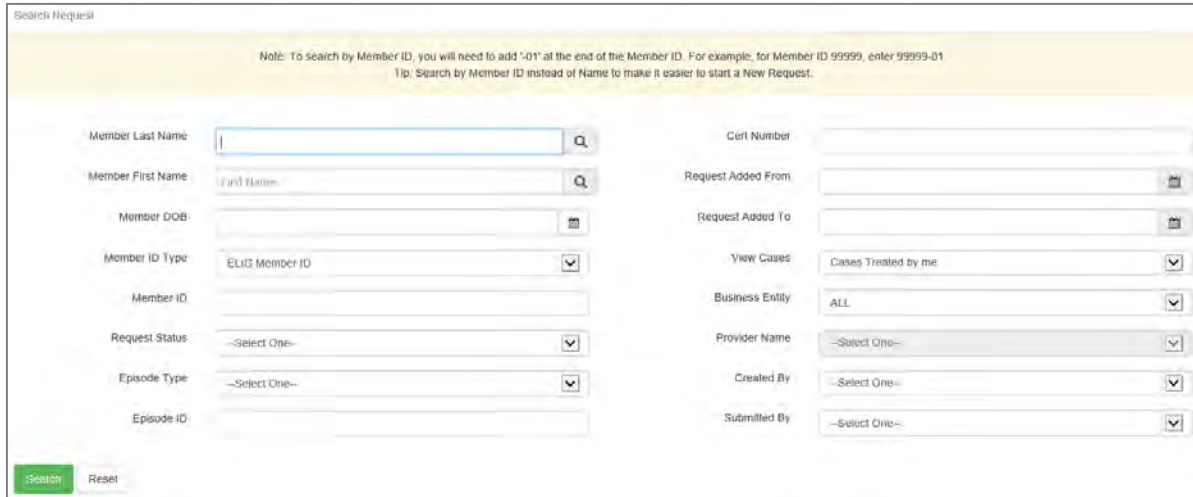


5 ADD CLINICAL TO AN EXISTING IP NON-CLINICAL REQUEST

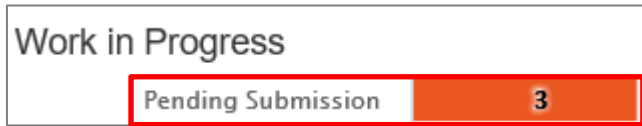
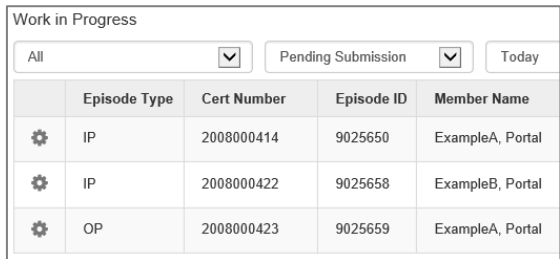
How to Add Clinical Information to Existing IP Non-Clinical Request

There are three options for accessing the non-clinical request.

Option #1: Search Request

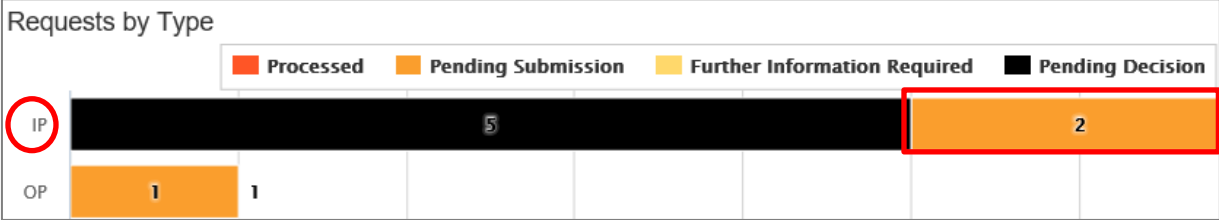
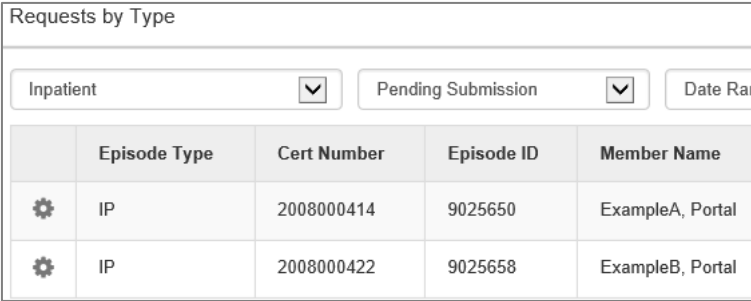
| Step | Action |
|------|---|
| 1. | <p>Click on Menu and select Search Request</p>  |
| 2. | <p>Enter the appropriate search criteria and click on the Search button.</p>  |
| 3. | <p>What results display will be based on the refinement of the search criteria.</p> <p>Note: Only those episodes for which you are either the Treating or Attending will be displayed.</p> |

Option #2: Dashboard – Work in Progress Widget

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------|--|------------------|------------|------------------|--|--|-----|--|--|--|--|--------------------|--|--|--|--|-------|--|--|--|--|--|--------------|-------------|------------|-------------|---|----|------------|---------|------------------|---|----|------------|---------|------------------|---|----|------------|---------|------------------|
| 1. | <p>Click on the Pending Submission hyperlink bar in the <i>Work in Progress</i> widget</p>  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. | <p>All Pending Submission requests, regardless of Episode Type, will be displayed.</p>  <table border="1"> <thead> <tr> <th colspan="5">Work in Progress</th> </tr> <tr> <th colspan="5">All</th> </tr> <tr> <th colspan="5">Pending Submission</th> </tr> <tr> <th colspan="5">Today</th> </tr> <tr> <th></th> <th>Episode Type</th> <th>Cert Number</th> <th>Episode ID</th> <th>Member Name</th> </tr> </thead> <tbody> <tr> <td>⚙</td> <td>IP</td> <td>2008000414</td> <td>9025650</td> <td>ExampleA, Portal</td> </tr> <tr> <td>⚙</td> <td>IP</td> <td>2008000422</td> <td>9025658</td> <td>ExampleB, Portal</td> </tr> <tr> <td>⚙</td> <td>OP</td> <td>2008000423</td> <td>9025659</td> <td>ExampleA, Portal</td> </tr> </tbody> </table> | Work in Progress | | | | | All | | | | | Pending Submission | | | | | Today | | | | | | Episode Type | Cert Number | Episode ID | Member Name | ⚙ | IP | 2008000414 | 9025650 | ExampleA, Portal | ⚙ | IP | 2008000422 | 9025658 | ExampleB, Portal | ⚙ | OP | 2008000423 | 9025659 | ExampleA, Portal |
| Work in Progress | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| All | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pending Submission | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Today | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Episode Type | Cert Number | Episode ID | Member Name | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ⚙ | IP | 2008000414 | 9025650 | ExampleA, Portal | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ⚙ | IP | 2008000422 | 9025658 | ExampleB, Portal | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ⚙ | OP | 2008000423 | 9025659 | ExampleA, Portal | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |



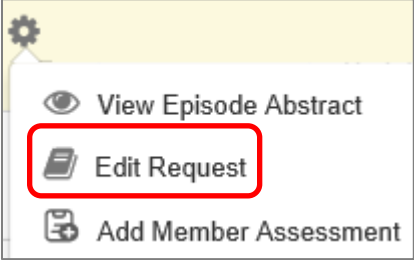
How to Add Clinical Information to Existing IP Non-Clinical Request

Option #3: Dashboard – Requests by Type Widget

| Step | Action | | | | | | | | | | | | | | | |
|------|--|-------------|--------------|------------------|------------|-------------|---|----|------------|---------|------------------|---|----|------------|---------|------------------|
| 1. | <p>Click on the Pending Submission hyperlink bar in the <i>Request by Type</i> widget</p>  <p>The screenshot shows a 'Requests by Type' widget with a legend: Processed (red), Pending Submission (orange), Further Information Required (yellow), and Pending Decision (black). The chart displays: IP (5), Pending Submission (2), and OP (1). The 'IP' label and the 'Pending Submission' bar are highlighted with red boxes.</p> | | | | | | | | | | | | | | | |
| 2. | <p>All Pending Submission requests for that Episode Type will be displayed.</p>  <p>The screenshot shows the 'Requests by Type' widget with filters set to 'Inpatient' and 'Pending Submission'. The table below displays the results:</p> <table border="1" data-bbox="245 806 992 982"> <thead> <tr> <th></th> <th>Episode Type</th> <th>Cert Number</th> <th>Episode ID</th> <th>Member Name</th> </tr> </thead> <tbody> <tr> <td>⚙</td> <td>IP</td> <td>2008000414</td> <td>9025650</td> <td>ExampleA, Portal</td> </tr> <tr> <td>⚙</td> <td>IP</td> <td>2008000422</td> <td>9025658</td> <td>ExampleB, Portal</td> </tr> </tbody> </table> | | Episode Type | Cert Number | Episode ID | Member Name | ⚙ | IP | 2008000414 | 9025650 | ExampleA, Portal | ⚙ | IP | 2008000422 | 9025658 | ExampleB, Portal |
| | Episode Type | Cert Number | Episode ID | Member Name | | | | | | | | | | | | |
| ⚙ | IP | 2008000414 | 9025650 | ExampleA, Portal | | | | | | | | | | | | |
| ⚙ | IP | 2008000422 | 9025658 | ExampleB, Portal | | | | | | | | | | | | |

Adding Clinical Information to Existing IP Non-Clinical Request – Edit Request

Follow these steps to open the request for editing.


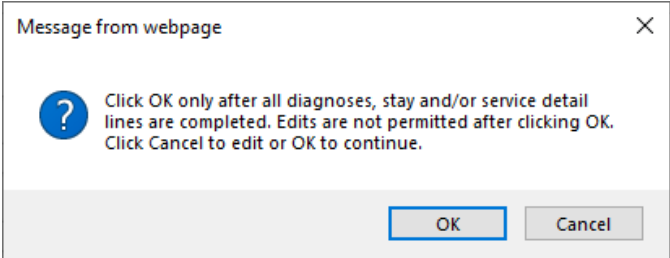
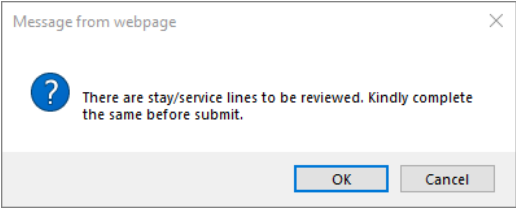
| Step | Action |
|------|--|
| 1. | <p>Click on the  icon to the left of the episode and select Edit Request.</p> <div data-bbox="245 438 626 642"></div> <div data-bbox="688 384 1099 642"></div> <p>Note: Depending on how you accessed the episode, you may see different options under the gear.</p> |
| 2. | <p>The request will open and is read to be updated.</p> |

Adding Clinical Information to Existing IP Non-Clinical Request – InterQual

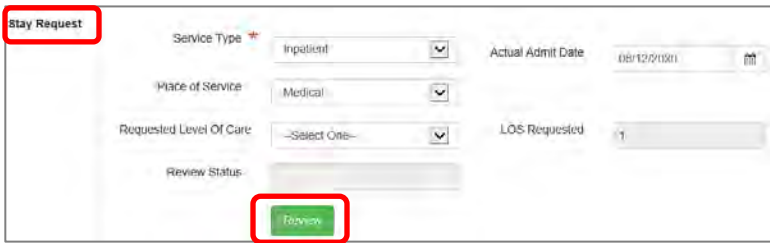
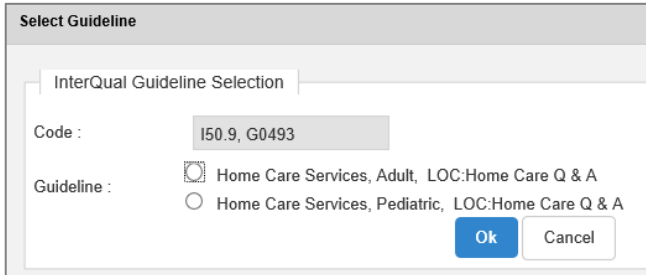
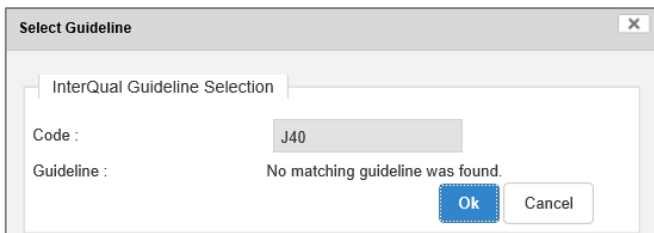
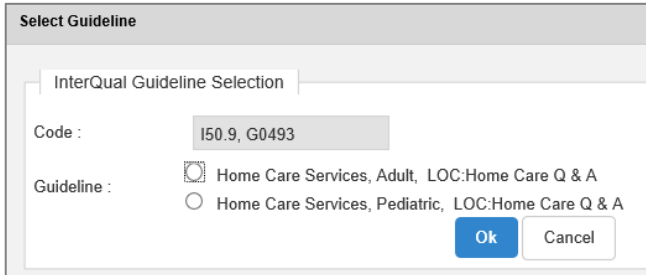
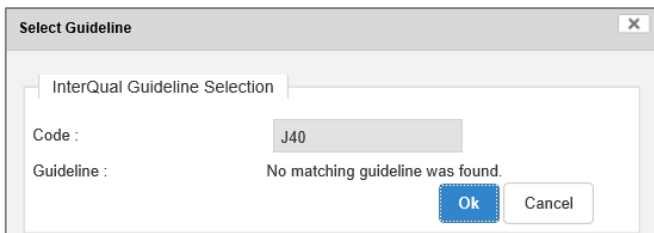
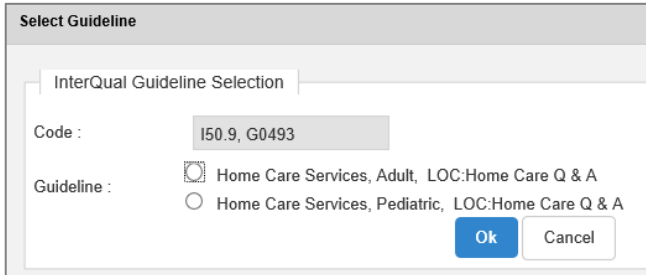
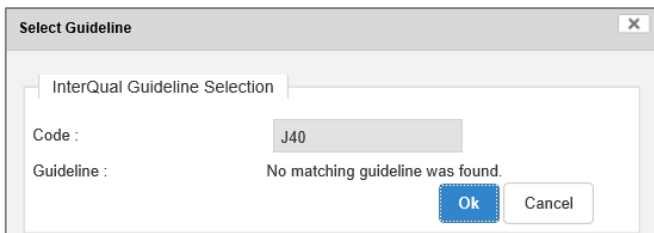


If you need training or have questions regarding the use of InterQual Connect criteria, please contact your facility InterQual trainer or contact your Change HealthCare account representative.

The health plan is certified to conduct training for internal associates only.

| Step | Action |
|------|---|
| 1. | Click the Check for Review button.  |
| 2. | You will receive the following message. Click OK <u>only</u> if you completed the items listed.  Result: The system will run a diagnostic review of the request to determine if a Stay Request and/or a Service Request is associated with it. |
| 3. | Once determined that one or both exists, you will receive the following pop-up message. Click OK .  |

Adding Clinical Information to Existing IP Non-Clinical Request – InterQual, cont.

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|----------------|------------|----------------------------|--|--|--|---------------|-------------------------------------|--------------|------------|------------|----------|--------------|------------------|---------------|--|-------------------------------------|------------|---|------------|------------|-----------|---------|--|
| 4. | <p>Click the appropriate Review button.</p> <table border="1" data-bbox="240 300 1552 531"> <thead> <tr> <th data-bbox="240 300 719 352">If...</th> <th data-bbox="719 300 1552 352">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 352 719 405">Only a Stay Request</td> <td data-bbox="719 352 1552 405"> <ul style="list-style-type: none"> Click the Review button associated with the Stay Request. </td> </tr> <tr> <td data-bbox="240 405 719 531">Both Stay and Service Requests</td> <td data-bbox="719 405 1552 531"> <ul style="list-style-type: none"> The Review button associated with the Stay Request will be inactive. Click the Review button associated with the Service Request. </td> </tr> </tbody> </table> <div data-bbox="240 552 1006 793"> <p>Stay Request</p>  <p>A screenshot of the 'Stay Request' form. The 'Review Status' field is empty. A green 'Review' button is highlighted with a red box.</p> </div> <div data-bbox="240 804 1360 1003"> <p>Review</p> <p>Service Request</p> <table border="1" data-bbox="240 898 1360 1003"> <thead> <tr> <th>Action</th> <th><input checked="" type="checkbox"/></th> <th>Service Code</th> <th>Requested#</th> <th>Start Date</th> <th>End Date</th> <th>Service Type</th> <th>Place of Service</th> <th>Review Status</th> </tr> </thead> <tbody> <tr> <td></td> <td><input checked="" type="checkbox"/></td> <td>93352(CPT)</td> <td>1</td> <td>08/12/2020</td> <td>08/13/2020</td> <td>Inpatient</td> <td>Medical</td> <td></td> </tr> </tbody> </table> </div> | If... | Then... | Only a Stay Request | <ul style="list-style-type: none"> Click the Review button associated with the Stay Request. | Both Stay and Service Requests | <ul style="list-style-type: none"> The Review button associated with the Stay Request will be inactive. Click the Review button associated with the Service Request. | Action | <input checked="" type="checkbox"/> | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | Review Status | | <input checked="" type="checkbox"/> | 93352(CPT) | 1 | 08/12/2020 | 08/13/2020 | Inpatient | Medical | |
| If... | Then... | | | | | | | | | | | | | | | | | | | | | | | | |
| Only a Stay Request | <ul style="list-style-type: none"> Click the Review button associated with the Stay Request. | | | | | | | | | | | | | | | | | | | | | | | | |
| Both Stay and Service Requests | <ul style="list-style-type: none"> The Review button associated with the Stay Request will be inactive. Click the Review button associated with the Service Request. | | | | | | | | | | | | | | | | | | | | | | | | |
| Action | <input checked="" type="checkbox"/> | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | Review Status | | | | | | | | | | | | | | | | | |
| | <input checked="" type="checkbox"/> | 93352(CPT) | 1 | 08/12/2020 | 08/13/2020 | Inpatient | Medical | | | | | | | | | | | | | | | | | | |
| 5. | <p>The system will connect with InterQual and determine if there is a matching guideline.</p> <table border="1" data-bbox="240 1066 1552 1812"> <thead> <tr> <th data-bbox="240 1066 584 1119">If there is...</th> <th data-bbox="584 1066 1552 1119">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 1119 584 1486">Matching Guideline</td> <td data-bbox="584 1119 1552 1486"> <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. Proceed to Step 6 in this section.</p>  <p>A screenshot of the 'Select Guideline' pop-up window. The 'Code' field contains '150.9, G0493'. Under 'Guideline', the radio button for 'Home Care Services, Adult, LOC:Home Care Q & A' is selected. 'Ok' and 'Cancel' buttons are visible.</p> </td> </tr> <tr> <td data-bbox="240 1486 584 1812">No Matching Guideline</td> <td data-bbox="584 1486 1552 1812"> <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. Proceed to Adding Documents.</p>  <p>A screenshot of the 'Select Guideline' pop-up window. The 'Code' field contains 'J40'. The 'Guideline' field displays 'No matching guideline was found.' 'Ok' and 'Cancel' buttons are visible.</p> </td> </tr> </tbody> </table> | If there is... | Then... | Matching Guideline | <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. Proceed to Step 6 in this section.</p>  <p>A screenshot of the 'Select Guideline' pop-up window. The 'Code' field contains '150.9, G0493'. Under 'Guideline', the radio button for 'Home Care Services, Adult, LOC:Home Care Q & A' is selected. 'Ok' and 'Cancel' buttons are visible.</p> | No Matching Guideline | <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. Proceed to Adding Documents.</p>  <p>A screenshot of the 'Select Guideline' pop-up window. The 'Code' field contains 'J40'. The 'Guideline' field displays 'No matching guideline was found.' 'Ok' and 'Cancel' buttons are visible.</p> | | | | | | | | | | | | | | | | | | |
| If there is... | Then... | | | | | | | | | | | | | | | | | | | | | | | | |
| Matching Guideline | <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. Proceed to Step 6 in this section.</p>  <p>A screenshot of the 'Select Guideline' pop-up window. The 'Code' field contains '150.9, G0493'. Under 'Guideline', the radio button for 'Home Care Services, Adult, LOC:Home Care Q & A' is selected. 'Ok' and 'Cancel' buttons are visible.</p> | | | | | | | | | | | | | | | | | | | | | | | | |
| No Matching Guideline | <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. Proceed to Adding Documents.</p>  <p>A screenshot of the 'Select Guideline' pop-up window. The 'Code' field contains 'J40'. The 'Guideline' field displays 'No matching guideline was found.' 'Ok' and 'Cancel' buttons are visible.</p> | | | | | | | | | | | | | | | | | | | | | | | | |

Adding Clinical Information to Existing IP Non-Clinical Request – InterQual, cont.

| Step | Action | | | | | | |
|-----------------|---|-----------------|---------|-------------|--|-----------------|---|
| 6. | After answering the review questions, the Recommendations page will display either Criteria Met or Criteria Not Met . | | | | | | |
| 7. | From the Recommendations page: <table border="1" data-bbox="240 422 1555 590"> <thead> <tr> <th data-bbox="240 422 440 464">If you click...</th> <th data-bbox="440 422 1555 464">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 464 440 506">Save</td> <td data-bbox="440 464 1555 506">The review will be saved and can be updated, if needed, prior to submitting the request.</td> </tr> <tr> <td data-bbox="240 506 440 590">Complete</td> <td data-bbox="440 506 1555 590">The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td> </tr> </tbody> </table> | If you click... | Then... | Save | The review will be saved and can be updated, if needed, prior to submitting the request. | Complete | The review will be saved and closed. It cannot be updated even if you have not yet submitted the request. |
| If you click... | Then... | | | | | | |
| Save | The review will be saved and can be updated, if needed, prior to submitting the request. | | | | | | |
| Complete | The review will be saved and closed. It cannot be updated even if you have not yet submitted the request. | | | | | | |
| 8. | Close the InterQual tab to return to the Provider Portal | | | | | | |
| 9. | The request line will now display a status in the Decision column. | | | | | | |

Adding Clinical Information to Existing IP Non-Clinical Request – Assessments

If an assessment is associated with the request, an **Assessment** section will be displayed where you may access and complete the associated assessment.

Assessments

New In Progress Completed Voided

| Assessment Title | Identified On | Assessment Added By |
|-------------------|---------------|---------------------|
| Sample Assessment | 11/23/2020 | Sentinel |

Start
Void
Trend Report
Print Blank Assessment

Page 1 of 1

Complete Save Save and Generate POC Cancel

Add Activity Notes Assessment (POC) Review Share With Member Last Answered Question

Assessment Score 0 of 9 Provider Portal Delivery Screening Assesmer Copy Group Answers Group Score : 0 of 9

Timer 00 : 00 : 09

Sample Question...

| Step | Action |
|------|--|
| 1. | In the New Tab of the Assessment section, click on the gear icon to the left of the Assessment and click on Start . |
| 2. | Answer the questions. Note - Questions in red are mandatory. |
| 3. | Click the Complete button to complete the assessment. Note - This will trigger any auto approval rules (if configured.) The Save button will not trigger the auto approval rules. |

Adding Clinical Information to Existing IP Non-Clinical Request – Adding Documents

When submitting an **IP Clinical Request**, you must attach the clinical information. Follow these instructions to add a **Documents**.

| Step | Action | | | | | | | | | | | | |
|------------------|---|----------------------|---|----------------------|---|---------------|---|--|--|-----------------|---|--|--|
| 2. | <p>Complete the following:</p> <ol style="list-style-type: none">Document Title: enter the title of the documentDocument Type: defaults to Medical Document, update as needed.Document Description: optional fieldClick the Browse button to search for the document you wish to upload<ol style="list-style-type: none">Click the desired document and click the Open buttonYou will see the document name listed next to the Browse button. <div data-bbox="289 737 1479 909"><p>Documents</p><table><tr><td>Document Title *</td><td><input type="text" value="Clinical Information"/></td><td>Document Description</td><td><input type="text" value="Can enter a document description here."/></td></tr><tr><td>Document Type</td><td><input type="text" value="Medical Document"/> ▼</td><td></td><td></td></tr><tr><td>Select Document</td><td><input type="button" value="Browse"/> PP Example Document.docx</td><td></td><td></td></tr></table></div> | Document Title * | <input type="text" value="Clinical Information"/> | Document Description | <input type="text" value="Can enter a document description here."/> | Document Type | <input type="text" value="Medical Document"/> ▼ | | | Select Document | <input type="button" value="Browse"/> PP Example Document.docx | | |
| Document Title * | <input type="text" value="Clinical Information"/> | Document Description | <input type="text" value="Can enter a document description here."/> | | | | | | | | | | |
| Document Type | <input type="text" value="Medical Document"/> ▼ | | | | | | | | | | | | |
| Select Document | <input type="button" value="Browse"/> PP Example Document.docx | | | | | | | | | | | | |

Adding Clinical Information to Existing IP Non-Clinical Request – Adding Notes

Notes

Note Type: --Select One--

Note Encounter Date: 08/13/2020

Note Encounter Time: 08:49

Note Text

File Edit View Format Tools

B *I* U ABC ✓

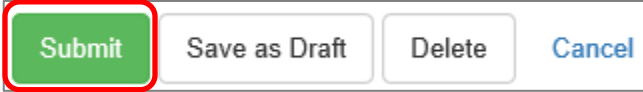
| Step | Action |
|------|--|
| 3. | Select the appropriate Note Type from the drop-down menu. |
| 4. | Enter the appropriate notes in the notes section. Be sure to include your name and contact information in the event the Plan needs to contact you. |



This is a shared note field. Notes can be viewed and entered by both you and the Plan.

Adding Clinical Information to Existing IP Non-Clinical Request – Submitting the Request

Once all required sections are completed, you are ready to submit the request.

| Step | Action |
|------|--|
| 1. | <p>Click on the Submit button to submit your request.</p>  <p>Note: The Submit button will not be active until a clinical review has been completed.</p> |
| 2. | <p>The Request Details information will be displayed, including the Cert Number.</p> <p>Note: If the request is programmed to auto-approve, you will see Approved in the Decision column.</p> |

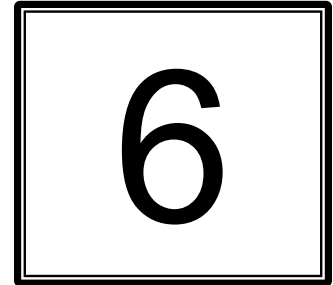
Request Details

Episode Abstract

Expected Decision Date : 08/15/2020 Authorization Type : IP Episode Number : 9025648 Episode Status : OpenRequest **Cert Number 2008000412**

| Stay Request | Stay ID | LOS Requested# | LOS Assigned# | LOS Denied | Auth Start Date | Auth End Date | Service Type | Decision |
|--------------|----------|----------------|---------------|------------|-----------------|---------------|--------------|----------|
| | 12548537 | 1 | 0 | 0 | 08/17/2020 | 08/18/2020 | Inpatient | - |

| Authorization Details | Service ID | Service Code | Requested # | Assigned # | Denied | Auth Start Date | Auth End Date | Service Type | Frequency | Decision |
|-----------------------|------------|--------------|-------------|------------|--------|-----------------|---------------|--------------|-----------|----------|
| | 12548538 | 27428(CPT) | 1 | 0 | 0 | | | Inpatient | Per Day | Pending |



6 ENTER AN OP CLINICAL REQUEST

How to Enter an Outpatient Clinical Request

When entering a request you have 2 options:

- 1) Enter a clinical request which includes all clinical information.
- 2) Enter a non-clinical request where the clinical information can be added at a later time

The steps in this chapter outline how to enter an OP clinical request. Reference chapter 7 “How to Enter an OP Non-clinical Request” and Chapter 8 “How to Add Clinical Information to an Existing OP Non-clinical Request” for more information.

When entering a **clinical** request, you **must provide** the following information:

- **Episode Details**
- **Diagnosis- primary a must, secondary is optional**
- **Treating Provider**
- **Referring Provider**
- **Add service request**
- **Add Assessments (if triggered)**
- **Clinical Information**

Adding a New OP Clinical Request – Adding Episode Details

After locating the member (following the steps outlined in Chapter 2), click on **Add New Request** and select **Outpatient** from the drop-down list.

The Member Demographics are at the top of the page. You may click the drop-down caret on the right to expand the demographics window.

The screenshot shows the top portion of a web application interface. At the top, there is a header bar with member information: "ExampleA, Portal (Female) DOB:", "Member ID:", and "Government Id:". Below this is a row of tabs: "Address 1234 Mulberry L... IA", "Phone & Email (515) 555-5555", "Coverage", "Group", "PCP/PCM", and "Allergies". A red circle highlights a small icon in the top right corner of this header. Below the tabs is the "Outpatient Request" section. On the left, there is a tab labeled "Episode Details" with an information icon. To the right of this tab are two dropdown menus: "Request Type *" with "Expected" selected, and "Request Priority *" with "Standard 24" selected. Below these dropdowns is a blue hyperlink labeled "Optional Fields", which is circled in red.

Follow these steps to complete the **Episode Details** section:

| Step | Action |
|------|---|
| 1. | Request Type: defaults to Expected , update if appropriate |
| 2. | Request Priority: defaults to Standard 24 , update if appropriate |

If you click the **Optional Fields** hyperlink, additional fields will be displayed.

This screenshot shows the "Episode Details" section expanded. It includes the "Request Type *" dropdown (set to "Expected") and the "Request Priority *" dropdown (set to "Standard 24"). Below these, two new fields are visible: "Time Request" with a text input field containing "24 Hours", and "Reason for Request" with a dropdown menu set to "--Select One--". A red box highlights the "Time Request" and "Reason for Request" fields.

- **Time Request:** This field will auto-populated based on the **Request Priority**.
- **Reason for Request:** Select the appropriate reason from the drop down.

Adding a New OP Clinical Request – Adding Diagnosis

You can add multiple diagnoses from this screen or you can utilize the **Favorite Diagnosis** hyperlink to save time and keystrokes. The **Favorite Diagnosis** function will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider’s account. Reference Chapter 9 “*Favorite Diagnosis List – How to Create a Favorites List.*”

! **Diagnosis**

Code Type *

Diagnosis *


[Advanced Search](#) [Favorite Diagnosis](#)

| Step | Action | | | | | | | | | | | | |
|--|---|-----------------------------------|-----------|----------------------------------|--|--|---|-----------------------------------|--|---|-------|---------------------------|---|
| 1. | Code Type will default to ICD10. You may select a different code type if applicable. | | | | | | | | | | | | |
| 2. | Type the diagnosis or code in the Diagnosis field. You may also use the Advanced Search function, if needed. | | | | | | | | | | | | |
| 3. | Once you select the diagnosis, it will display on the screen and be attached to the episode. <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #f2f2f2;"> <th>Primary Dx</th> <th>Code Type</th> <th>Diagnosis</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">★</td> <td>ICD10</td> <td>I50.9--Heart failure, unspecified</td> <td></td> </tr> <tr> <td style="text-align: center;">☆</td> <td>ICD10</td> <td>R69--Illness, unspecified</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> | Primary Dx | Code Type | Diagnosis | Actions | ★ | ICD10 | I50.9--Heart failure, unspecified | | ☆ | ICD10 | R69--Illness, unspecified | - |
| Primary Dx | Code Type | Diagnosis | Actions | | | | | | | | | | |
| ★ | ICD10 | I50.9--Heart failure, unspecified | | | | | | | | | | | |
| ☆ | ICD10 | R69--Illness, unspecified | - | | | | | | | | | | |
| 4. | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #808080; color: white;"> <th>If you...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>want to add additional diagnoses</td> <td> Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon to remove a diagnosis from the request. - You cannot remove a diagnosis unless there is more than one diagnosis already selected - Click the Star ★ in the Primary Dx column if you need to designate a different diagnosis as primary. </td> </tr> <tr> <td>do not want to add additional diagnoses</td> <td>Proceed to the Providers section of the episode.</td> </tr> </tbody> </table> | If you... | Then... | want to add additional diagnoses | Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon to remove a diagnosis from the request. - You cannot remove a diagnosis unless there is more than one diagnosis already selected - Click the Star ★ in the Primary Dx column if you need to designate a different diagnosis as primary. | do not want to add additional diagnoses | Proceed to the Providers section of the episode. | | | | | | |
| If you... | Then... | | | | | | | | | | | | |
| want to add additional diagnoses | Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon to remove a diagnosis from the request. - You cannot remove a diagnosis unless there is more than one diagnosis already selected - Click the Star ★ in the Primary Dx column if you need to designate a different diagnosis as primary. | | | | | | | | | | | | |
| do not want to add additional diagnoses | Proceed to the Providers section of the episode. | | | | | | | | | | | | |

Adding a New OP Clinical Request – Adding Providers

All Outpatient requests should contain a **Treating** provider (Facility or Agency providing the service) and a **Referring** provider (physician or group referring the member for services).

The steps below outline the processes for adding providers to the request.





| | |
|---|---|
|  | <p>Favorite Providers - You can utilize the Favorite Providers hyperlink to save time and keystrokes. The Favorite Providers list will allow you to create and manage a list of frequently used providers. Reference Chapter 9 “<i>Favorite Providers List–How to Create a Favorites List.</i>”</p> |
|---|---|

| Step | Action | | | | | | |
|----------------------------|--|----------------------------|---------|--------------|--------------------------------|-------------------------|---|
| 1. | <p>Click the Attach Providers button.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Provider Details <div style="border: 2px solid red; padding: 5px;"> Attach Providers </div> Favorite Providers </div> </div> | | | | | | |
| 2. | <p>Enter the appropriate search criteria and click on Search.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <p>Attach Providers</p> <p>i Enter any search criteria</p> </div> <div style="border: 2px solid red; padding: 10px; margin: 5px 0;"> <p style="text-align: center; margin: 0;">LOB</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Provider Last Name / Facility <input style="width: 90%;" type="text" value="Last Name / Facility"/> Q</p> <p>NPIN <input style="width: 100%;" type="text"/></p> </div> <div style="width: 45%;"> <p>Provider First Name <input style="width: 90%;" type="text" value="Provider First Name"/> Q</p> <p>Provider ID <input style="width: 100%;" type="text"/></p> </div> </div> <p style="text-align: center; margin-top: 10px;"> Search Advanced Search </p> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> Attach Cancel </div> </div> | | | | | | |
| 3. | <p>After clicking Search:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">If appropriate provider...</th> <th style="text-align: center;">Then...</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Is displayed</td> <td>Click the Attach button</td> </tr> <tr> <td style="text-align: center;"><i>Is not</i> displayed</td> <td> <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="text-align: center; margin: 0;">LOB</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Provider Last Name / Facility <input style="width: 90%;" type="text" value="Last Name / Facility"/> Q</p> <p>NPIN <input style="width: 100%;" type="text"/></p> <p>Provider Type: --Select One-- v</p> <p>Tax ID <input style="width: 100%;" type="text"/></p> <p>City <input style="width: 100%;" type="text"/></p> <p>Provider Phone <input style="width: 100%;" type="text"/></p> </div> <div style="width: 45%;"> <p>Provider ID <input style="width: 100%;" type="text"/></p> <p>Specialty: --Select One-- v</p> <p>State: --Select One-- v</p> <p>County <input style="width: 100%;" type="text"/></p> <p>Network: --Select One-- v</p> </div> </div> <p style="text-align: center; margin-top: 10px;"> Search Basic Search </p> </div> </td> </tr> </tbody> </table> | If appropriate provider... | Then... | Is displayed | Click the Attach button | <i>Is not</i> displayed | <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="text-align: center; margin: 0;">LOB</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Provider Last Name / Facility <input style="width: 90%;" type="text" value="Last Name / Facility"/> Q</p> <p>NPIN <input style="width: 100%;" type="text"/></p> <p>Provider Type: --Select One-- v</p> <p>Tax ID <input style="width: 100%;" type="text"/></p> <p>City <input style="width: 100%;" type="text"/></p> <p>Provider Phone <input style="width: 100%;" type="text"/></p> </div> <div style="width: 45%;"> <p>Provider ID <input style="width: 100%;" type="text"/></p> <p>Specialty: --Select One-- v</p> <p>State: --Select One-- v</p> <p>County <input style="width: 100%;" type="text"/></p> <p>Network: --Select One-- v</p> </div> </div> <p style="text-align: center; margin-top: 10px;"> Search Basic Search </p> </div> |
| If appropriate provider... | Then... | | | | | | |
| Is displayed | Click the Attach button | | | | | | |
| <i>Is not</i> displayed | <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="text-align: center; margin: 0;">LOB</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Provider Last Name / Facility <input style="width: 90%;" type="text" value="Last Name / Facility"/> Q</p> <p>NPIN <input style="width: 100%;" type="text"/></p> <p>Provider Type: --Select One-- v</p> <p>Tax ID <input style="width: 100%;" type="text"/></p> <p>City <input style="width: 100%;" type="text"/></p> <p>Provider Phone <input style="width: 100%;" type="text"/></p> </div> <div style="width: 45%;"> <p>Provider ID <input style="width: 100%;" type="text"/></p> <p>Specialty: --Select One-- v</p> <p>State: --Select One-- v</p> <p>County <input style="width: 100%;" type="text"/></p> <p>Network: --Select One-- v</p> </div> </div> <p style="text-align: center; margin-top: 10px;"> Search Basic Search </p> </div> | | | | | | |




Adding a New OP Clinical Request – Adding Providers (cont.)



| Search Results | | | | | | |
|----------------|---------------|--------------|-----------------|---------------|---------|--|
| Provider ID | Provider Name | Location | Type | Provider Role | Partici | |
| 0000000 | Hospital A | Any City, PA | Facility/Vendor | Treating | | |

-  Single Attach
-  Multiple Attach
-  Set as Favorite

| Step | Action |
|------|---|
| 4. | <ul style="list-style-type: none"> Search for the facility. Once you have located the facility, select “Treating” from the drop-down list in the Provider Role column, click the  icon next to the provider row and select  Single Attach to attach the provider to the episode. <p>Result: The Provider will be attached and listed in the Providers section of the episode.</p> |
| 5. | <ul style="list-style-type: none"> Search for the attending physician. Once you have located the physician, select “Referring” from the drop-down list in the Provider Role column, click the  icon next to the provider row and select  Single Attach to attach the provider to the episode. <p>Result: The Provider will be attached and listed in the Providers section of the episode.</p> |



| If you want to ... | Then... |
|---|---|
| <p><u>Attach multiple providers to an episode at the same time</u></p> | <p>Follow the steps outlined below:</p> <ul style="list-style-type: none"> Search for the desired providers In the row of each desired provider in the search results screen, select the appropriate Provider Role from the drop-down list, click the  icon next to the row and select the  Multiple Attach option As each provider is selected, they will be added to the “Selected Providers List” at the bottom of the screen When all providers have been added, verify the selected Provider Role and click the  Attach button to add them to the episode. |

| Provider Details | ID | Name | Location | Role | Network | Phone | Action |
|------------------|----|------------|----------|-----------|---------|-------|---|
| | | Provider A | | Referring | | |  |
| | | Provider B | | Treating | | |  |

NOTE:

- If the incorrect provider is attached, click the **Deactivate** icon  to deactivate the facility. The facility will be removed from the episode.

Adding a New OP Clinical Request – Adding Service Request

You will need to complete the **Service/Specialty Drug Request** section.



Favorite Services - You can utilize the Favorite Services hyperlink to save time and keystrokes. The **Favorite Services** list will allow you to create and manage a list of frequently used services. Reference Chapter 9 “*Favorite Services List–How to Create a Favorites List.*”

| | | | | |
|--------------------------------|------------------|---|--------------|-----------------|
| Service/Specialty Drug Request | Service Type * | --Select One-- | Modifier | Search Modifier |
| | Place of Service | Medical | Start Date * | |
| | Code Type * | CPT | End Date * | |
| | Service Code * | Search Service Code | Requested # | 1 |
| | | Advanced Search Favorite Services | | |
| | | Optional Fields | | |
| | UCR Cost | \$ | Units | 1 |
| | Time Frame | Per Day | | |
| | Time period | 1 | | |
| | | Add | | |

| Step | Action | | | | | | | | | | | | | | | | | | | | | | |
|-------------------------|--|---------------------|---|-------------------------|---|------------------|---|---------------------|---|-----------------|---------------------------------------|-------------------|---|-----------------|-----------------------------------|--------------------|------------------------------------|-------------------|----------------------|--------------------|----------------|---------------------|--|
| 1. | <p>Complete information in the Service Request section (<i>if applicable</i>) using the guidelines outlined below:</p> <table border="1"> <tr> <td>Service Type</td> <td>Choose the appropriate selection from the drop-down list.</td> </tr> <tr> <td>Place of Service</td> <td>Choose the appropriate selection from the drop-down list.</td> </tr> <tr> <td>Code Type</td> <td>Auto-populated to CPT, update if necessary.</td> </tr> <tr> <td>Service Code</td> <td>Enter the requested service code. Note: You can type the service code or a description of the code. As information is typed, the auto coder will automatically display matches in the drop-down list. Select the appropriate service from the list. You can also use the Advanced Search link to initiate a search for the service code.</td> </tr> <tr> <td>Modifier</td> <td>Enter modifier details as appropriate</td> </tr> <tr> <td>Start Date</td> <td>Enter the date of the requested service</td> </tr> <tr> <td>End Date</td> <td>Enter the end date of the service</td> </tr> <tr> <td>Requested #</td> <td>Enter the appropriate units/visits</td> </tr> </table> <p>To view these fields, you may need to click on the Optional Fields hyperlink.</p> <table border="1"> <tr> <td>Time Frame</td> <td>Defaults to Per Day.</td> </tr> <tr> <td>Time Period</td> <td>Defaults to 1.</td> </tr> <tr> <td>Units/Visits</td> <td>Defaults to 1. Enter the appropriate units/visits.</td> </tr> </table> | Service Type | Choose the appropriate selection from the drop-down list. | Place of Service | Choose the appropriate selection from the drop-down list. | Code Type | Auto-populated to CPT, update if necessary. | Service Code | Enter the requested service code. Note: You can type the service code or a description of the code. As information is typed, the auto coder will automatically display matches in the drop-down list. Select the appropriate service from the list. You can also use the Advanced Search link to initiate a search for the service code. | Modifier | Enter modifier details as appropriate | Start Date | Enter the date of the requested service | End Date | Enter the end date of the service | Requested # | Enter the appropriate units/visits | Time Frame | Defaults to Per Day. | Time Period | Defaults to 1. | Units/Visits | Defaults to 1. Enter the appropriate units/visits. |
| Service Type | Choose the appropriate selection from the drop-down list. | | | | | | | | | | | | | | | | | | | | | | |
| Place of Service | Choose the appropriate selection from the drop-down list. | | | | | | | | | | | | | | | | | | | | | | |
| Code Type | Auto-populated to CPT, update if necessary. | | | | | | | | | | | | | | | | | | | | | | |
| Service Code | Enter the requested service code. Note: You can type the service code or a description of the code. As information is typed, the auto coder will automatically display matches in the drop-down list. Select the appropriate service from the list. You can also use the Advanced Search link to initiate a search for the service code. | | | | | | | | | | | | | | | | | | | | | | |
| Modifier | Enter modifier details as appropriate | | | | | | | | | | | | | | | | | | | | | | |
| Start Date | Enter the date of the requested service | | | | | | | | | | | | | | | | | | | | | | |
| End Date | Enter the end date of the service | | | | | | | | | | | | | | | | | | | | | | |
| Requested # | Enter the appropriate units/visits | | | | | | | | | | | | | | | | | | | | | | |
| Time Frame | Defaults to Per Day. | | | | | | | | | | | | | | | | | | | | | | |
| Time Period | Defaults to 1. | | | | | | | | | | | | | | | | | | | | | | |
| Units/Visits | Defaults to 1. Enter the appropriate units/visits. | | | | | | | | | | | | | | | | | | | | | | |

Adding a New OP Clinical Request – Adding Service Request, cont.

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-----------------|--|-----------------|------------|------------|--------------|------------------|--|--|--------|--------------|------------|------------|----------|--------------|------------------|---|-------------|---|------------|------------|------|---------|---|-------------|----|------------|------------|------|---------|
| 2. | <p>Click the Add button.</p> <p>Result: The Service Request line will now be populated (appears below the Service Request fields)</p> <table border="1" data-bbox="233 359 1518 600"> <thead> <tr> <th colspan="7" data-bbox="233 359 1518 405">Service Request</th> </tr> <tr> <th data-bbox="233 405 431 468">Action</th> <th data-bbox="431 405 621 468">Service Code</th> <th data-bbox="621 405 805 468">Requested#</th> <th data-bbox="805 405 964 468">Start Date</th> <th data-bbox="964 405 1118 468">End Date</th> <th data-bbox="1118 405 1300 468">Service Type</th> <th data-bbox="1300 405 1518 468">Place of Service</th> </tr> </thead> <tbody> <tr> <td data-bbox="233 468 431 531">-</td> <td data-bbox="431 468 621 531">G0493(HCPC)</td> <td data-bbox="621 468 805 531">5</td> <td data-bbox="805 468 964 531">08/17/2020</td> <td data-bbox="964 468 1118 531">09/01/2020</td> <td data-bbox="1118 468 1300 531">Home</td> <td data-bbox="1300 468 1518 531">Medical</td> </tr> <tr> <td data-bbox="233 531 431 600">-</td> <td data-bbox="431 531 621 600">S9131(HCPC)</td> <td data-bbox="621 531 805 600">14</td> <td data-bbox="805 531 964 600">08/19/2020</td> <td data-bbox="964 531 1118 600">09/02/2020</td> <td data-bbox="1118 531 1300 600">Home</td> <td data-bbox="1300 531 1518 600">Medical</td> </tr> </tbody> </table> <p>Note: If a Service Request was added in error or with incorrect information, you may click the icon in the Action column to remove the given line.</p> | Service Request | | | | | | | Action | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | - | G0493(HCPC) | 5 | 08/17/2020 | 09/01/2020 | Home | Medical | - | S9131(HCPC) | 14 | 08/19/2020 | 09/02/2020 | Home | Medical |
| Service Request | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Action | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | | | | | | | | | | | | | | | | | | | | | | | |
| - | G0493(HCPC) | 5 | 08/17/2020 | 09/01/2020 | Home | Medical | | | | | | | | | | | | | | | | | | | | | | | |
| - | S9131(HCPC) | 14 | 08/19/2020 | 09/02/2020 | Home | Medical | | | | | | | | | | | | | | | | | | | | | | | |
| 3. | Repeat Steps 2 & 3 if additional service requests need to be added | | | | | | | | | | | | | | | | | | | | | | | | | | | | |


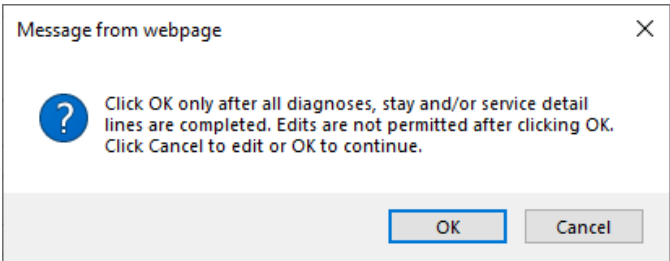
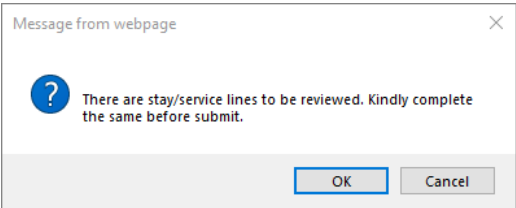
Adding a New OP Clinical Request – InterQual

Access and complete InterQual Connect Clinical Criteria


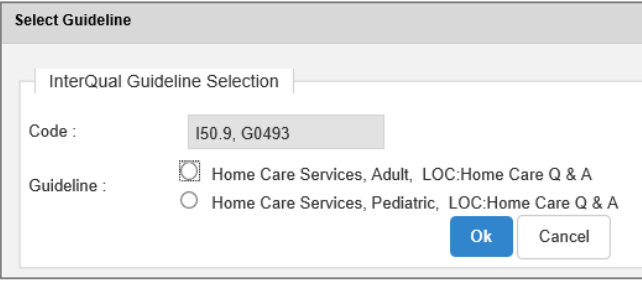
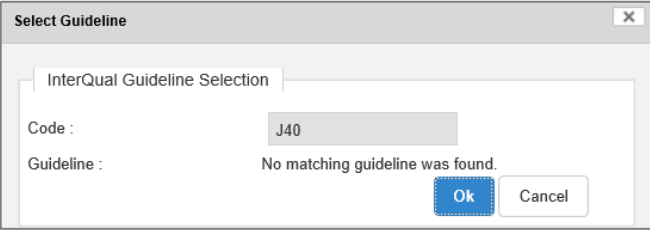
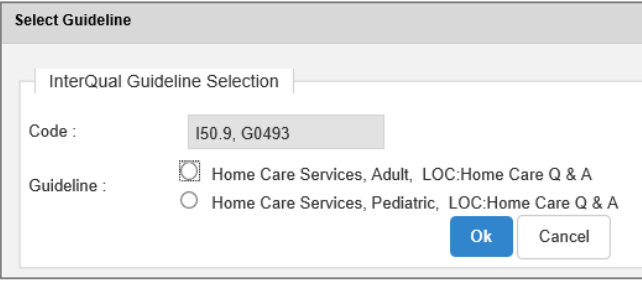
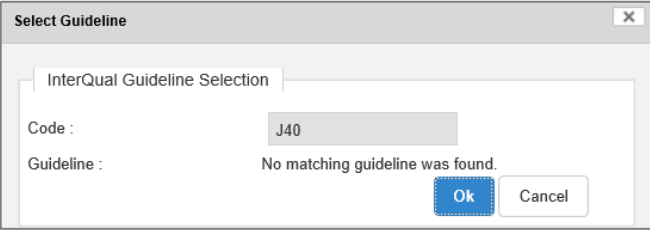
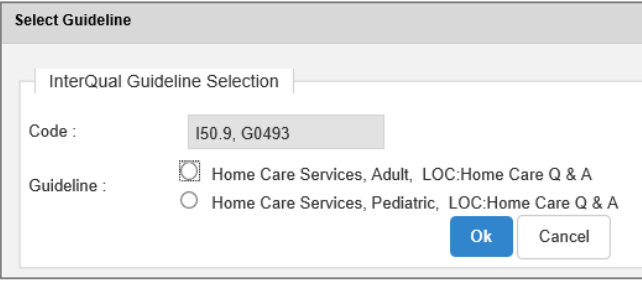
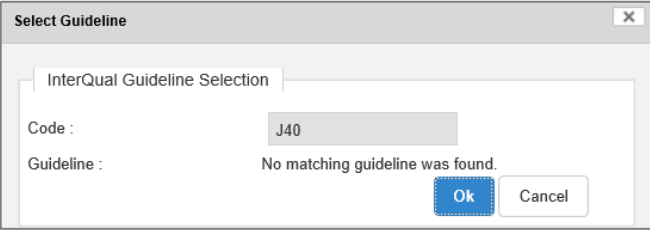


If you need training or have questions regarding the use of InterQual Connect criteria, please contact your facility InterQual trainer or contact your Change HealthCare account representative.

The health plan is certified to conduct training for internal associates only.

| Step | Action |
|------|---|
| 1. | Click the Check for Review button. <div style="text-align: center; margin-top: 10px;">  </div> |
| 2. | You will receive the following message. Click OK <u>only</u> if you completed the items listed. <div style="margin-top: 10px;">  </div> <p>Result: The system will run a diagnostic review of the request to determine if a Stay Request and/or a Service Request is associated with it.</p> |
| 3. | Once determined that one or both exists, you will receive the following pop-up message. Click OK . <div style="margin-top: 10px;">  </div> |

Adding a New OP Clinical Request – InterQual, cont.

| Step | Action | | | | | | | | | | | | | | | | |
|-------------------------------------|---|----------------|--------------|----------------------------------|--|-------------------------------------|--|------------------|---------------|-------------------------------------|------------|---|------------|------------|-----------|---------|--|
| 4. | <p>Click the Review button.</p>  <p>The screenshot shows a green 'Review' button and a 'Service Request' table with the following data:</p> <table border="1" data-bbox="245 432 1356 533"> <thead> <tr> <th>Action</th> <th>Service Code</th> <th>Requested#</th> <th>Start Date</th> <th>End Date</th> <th>Service Type</th> <th>Place of Service</th> <th>Review Status</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>93352(CPT)</td> <td>1</td> <td>08/12/2020</td> <td>08/13/2020</td> <td>Inpatient</td> <td>Medical</td> <td></td> </tr> </tbody> </table> | Action | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | Review Status | <input checked="" type="checkbox"/> | 93352(CPT) | 1 | 08/12/2020 | 08/13/2020 | Inpatient | Medical | |
| Action | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | Review Status | | | | | | | | | | |
| <input checked="" type="checkbox"/> | 93352(CPT) | 1 | 08/12/2020 | 08/13/2020 | Inpatient | Medical | | | | | | | | | | | |
| 5. | <p>The system will connect with InterQual and determine if there is a matching guideline.</p> <table border="1" data-bbox="240 638 1555 1377"> <thead> <tr> <th data-bbox="240 638 586 684">If there is...</th> <th data-bbox="586 638 1555 684">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 684 586 1054"> <p>Matching Guideline</p> </td> <td data-bbox="586 684 1555 1054"> <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. Proceed to Step 6 in this section.</p>  <p>The screenshot shows a 'Select Guideline' window with the following details:</p> <ul style="list-style-type: none"> Code: 150.9, G0493 Guideline: <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q & A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q & A </td> </tr> <tr> <td data-bbox="240 1054 586 1377"> <p>No Matching Guideline</p> </td> <td data-bbox="586 1054 1555 1377"> <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. Proceed to Adding Documents.</p>  <p>The screenshot shows a 'Select Guideline' window with the following details:</p> <ul style="list-style-type: none"> Code: J40 Guideline: No matching guideline was found. </td> </tr> </tbody> </table> | If there is... | Then... | <p>Matching Guideline</p> | <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. Proceed to Step 6 in this section.</p>  <p>The screenshot shows a 'Select Guideline' window with the following details:</p> <ul style="list-style-type: none"> Code: 150.9, G0493 Guideline: <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q & A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q & A | <p>No Matching Guideline</p> | <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. Proceed to Adding Documents.</p>  <p>The screenshot shows a 'Select Guideline' window with the following details:</p> <ul style="list-style-type: none"> Code: J40 Guideline: No matching guideline was found. | | | | | | | | | | |
| If there is... | Then... | | | | | | | | | | | | | | | | |
| <p>Matching Guideline</p> | <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. Proceed to Step 6 in this section.</p>  <p>The screenshot shows a 'Select Guideline' window with the following details:</p> <ul style="list-style-type: none"> Code: 150.9, G0493 Guideline: <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q & A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q & A | | | | | | | | | | | | | | | | |
| <p>No Matching Guideline</p> | <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. Proceed to Adding Documents.</p>  <p>The screenshot shows a 'Select Guideline' window with the following details:</p> <ul style="list-style-type: none"> Code: J40 Guideline: No matching guideline was found. | | | | | | | | | | | | | | | | |

Adding a New OP Clinical Request – InterQual, cont.

| Step | Action | | | | | | |
|-----------------|---|-----------------|---------|-------------|--|-----------------|---|
| 6. | After answering the review questions, the Recommendations page will display either Criteria Met or Criteria Not Met . | | | | | | |
| 7. | From the Recommendations page: <table border="1" data-bbox="240 422 1555 590"> <thead> <tr> <th data-bbox="240 422 440 464">If you click...</th> <th data-bbox="440 422 1555 464">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 464 440 506">Save</td> <td data-bbox="440 464 1555 506">The review will be saved and can be updated, if needed, prior to submitting the request.</td> </tr> <tr> <td data-bbox="240 506 440 590">Complete</td> <td data-bbox="440 506 1555 590">The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td> </tr> </tbody> </table> | If you click... | Then... | Save | The review will be saved and can be updated, if needed, prior to submitting the request. | Complete | The review will be saved and closed. It cannot be updated even if you have not yet submitted the request. |
| If you click... | Then... | | | | | | |
| Save | The review will be saved and can be updated, if needed, prior to submitting the request. | | | | | | |
| Complete | The review will be saved and closed. It cannot be updated even if you have not yet submitted the request. | | | | | | |
| 8. | Close the InterQual tab to return to the Provider Portal | | | | | | |
| 9. | The request line will now display a status in the Decision column. | | | | | | |

Adding a New OP Clinical Request – Adding Assessments

If an assessment is associated with the request, an **Assessment** section will be displayed where you may access and complete the associated assessment.

| Step | Action |
|------|--|
| 1. | In the New Tab of the Assessment section, click on the gear icon to the left of the Assessment and click on Start . |
| 2. | Answer the questions. Note - Questions in red are mandatory. |
| 3. | Click the Complete button to complete the assessment. Note - This will trigger any auto approval rules (if configured.) The Save button will not trigger the auto approval rules. |

Adding a New OP Clinical Request – Adding Documents

When submitting an **OP Clinical Request**, you must attach the clinical information. Follow these instructions to add a **Documents**.

| Step | Action | | | | | | | | | | | | |
|------------------|---|----------------------|---|----------------------|---|---------------|---|--|--|-----------------|---|--|--|
| 1. | <p>Complete the following:</p> <ol style="list-style-type: none">Document Title: enter the title of the documentDocument Type: defaults to Medical Document, update as needed.Document Description: optional fieldClick the Browse button to search for the document you wish to upload<ol style="list-style-type: none">Click the desired document and click the Open buttonYou will see the document name listed next to the Browse button. <div data-bbox="289 764 1479 936"><p>Documents</p><table><tr><td>Document Title *</td><td><input type="text" value="Clinical Information"/></td><td>Document Description</td><td><input type="text" value="Can enter a document description here."/></td></tr><tr><td>Document Type</td><td><input type="text" value="Medical Document"/> ▼</td><td></td><td></td></tr><tr><td>Select Document</td><td><input type="button" value="Browse"/> <input type="text" value="PP Example Document.docx"/></td><td></td><td></td></tr></table></div> | Document Title * | <input type="text" value="Clinical Information"/> | Document Description | <input type="text" value="Can enter a document description here."/> | Document Type | <input type="text" value="Medical Document"/> ▼ | | | Select Document | <input type="button" value="Browse"/> <input type="text" value="PP Example Document.docx"/> | | |
| Document Title * | <input type="text" value="Clinical Information"/> | Document Description | <input type="text" value="Can enter a document description here."/> | | | | | | | | | | |
| Document Type | <input type="text" value="Medical Document"/> ▼ | | | | | | | | | | | | |
| Select Document | <input type="button" value="Browse"/> <input type="text" value="PP Example Document.docx"/> | | | | | | | | | | | | |

Adding a New OP Clinical Request – Adding Notes

Notes

Note Type: --Select One--

Note Encounter Date: 08/13/2020

Note Encounter Time: 08:49

Note Text

File Edit View Format Tools

B *I* U ABC ✓

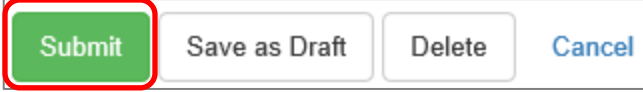
| Step | Action |
|------|--|
| 1. | Select the appropriate Note Type from the drop-down menu. |
| 2. | Enter the appropriate notes in the notes section. Be sure to include your name and contact information in the event the Plan needs to contact you. |



This is a shared note field. Notes can be viewed and entered by both you and the Plan.

Adding a New OP Clinical Request – Submitting the Request

Once all required sections are completed, you are ready to submit the request.

| Step | Action |
|------|--|
| 1. | <p>Click on the Submit button to submit your request.</p>  <p>Note: The Submit button will not be active until a clinical review has been completed.</p> |
| 2. | <p>The Request Details information will be displayed, including the Cert Number.</p> <p>Note: If the request is programmed to auto-approve, you will see Approved in the Decision column.</p> |

| Request Details | | | | | | | | | | |
|--------------------------|--------------|--------------------|------------|------------------|-----------------|------------------|--------------|-------------|----------|--|
| Episode Abstract | | | | | | | | | | |
| Expected Decision Date : | | Authorization Type | | Episode Number : | | Episode Status : | | Cert Number | | |
| 08/15/2020 | | OP | | 9025648 | | OpenRequest | | 2008000412 | | |
| Authorization Details | | | | | | | | | | |
| Service ID | Service Code | Requested # | Assigned # | Denied | Auth Start Date | Auth End Date | Service Type | Frequency | Decision | |
| 12548538 | 27428(CPT) | 1 | 0 | 0 | | | Inpatient | Per Day | Pending | |



7 ENTER AN OP NON-CLINICAL REQUEST

How to Enter an Outpatient Non-Clinical Request

A non-clinical request can be started by non-clinical staff or anyone who does not have clinical information available at the time of entry.

The non-clinical request can be saved and is available to access at a later time in order to add clinical data.

When entering a **non-clinical** request, you **must provide** the following information:

- **Episode Details**
- **Diagnosis- primary a must, secondary is optional**
- **Treating Provider**
- **Referring Provider**
- **Add service request**

Adding a New OP Non-Clinical Request – Adding Episode Details

After locating the member (following the steps outlined in Chapter 2), click on **Add New Request** and select **Outpatient** from the drop-down list.

The Member Demographics are at the top of the page. You may click the drop-down caret on the right to expand the demographics window.

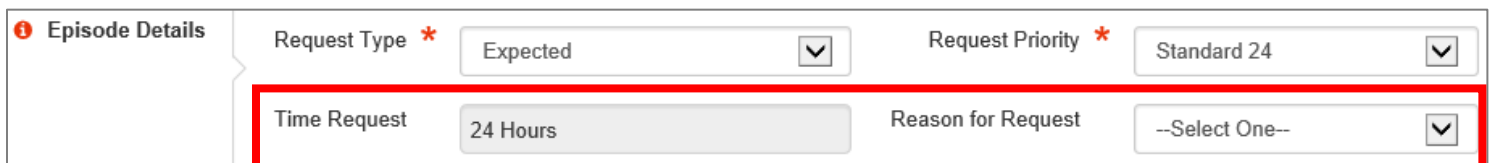


The screenshot shows the top portion of a web application interface. At the top, there is a header bar with member information: "ExampleA, Portal (Female) DOB:", "Member ID:", and "Government Id:". Below this is a navigation bar with tabs for "Address 1234 Mulberry L... IA", "Phone & Email (515) 555-5555", "Coverage", "Group", "PCP/PCM", and "Allergies". A red circle highlights a drop-down caret on the right side of the navigation bar. Below the navigation bar is the "Outpatient Request" section. On the left, there is a tab labeled "Episode Details" with an information icon. To the right of this tab are two dropdown menus: "Request Type *" with the value "Expected" and "Request Priority *" with the value "Standard 24". Below these dropdowns is a blue hyperlink labeled "Optional Fields", which is circled in red.

Follow these steps to complete the **Episode Details** section:

| Step | Action |
|------|---|
| 1. | Request Type: defaults to Expected , update if appropriate |
| 2. | Request Priority: defaults to Standard 24 , update if appropriate |

If you click the **Optional Fields** hyperlink, additional fields will be displayed.



This screenshot shows the "Episode Details" section expanded. It includes the "Request Type *" dropdown (set to "Expected") and the "Request Priority *" dropdown (set to "Standard 24"). Below these, two additional fields are visible and highlighted with a red box: "Time Request" with a text input field containing "24 Hours", and "Reason for Request" with a dropdown menu set to "--Select One--".

- **Time Request:** This field will auto-populated based on the **Request Priority**.
- **Reason for Request:** Select the appropriate reason from the drop down.

Adding a New OP Non-Clinical Request – Adding Diagnosis

You can add multiple diagnoses from this screen or you can utilize the **Favorite Diagnosis** hyperlink to save time and keystrokes. The **Favorite Diagnosis** function will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider’s account. Reference Chapter 9 “*Favorite Diagnosis List – How to Create a Favorites List.*”

i **Diagnosis**

Code Type *

Diagnosis *


Advanced Search Favorite Diagnosis

| Step | Action | | | | | | | | | | | | |
|--|---|-----------------------------------|-----------|----------------------------------|--|--|---|-----------------------------------|--|---|-------|---------------------------|---|
| 1. | Code Type will default to ICD10. You may select a different code type if applicable. | | | | | | | | | | | | |
| 2. | Type the diagnosis or code in the Diagnosis field. You may also use the Advanced Search function, if needed. | | | | | | | | | | | | |
| 3. | Once you select the diagnosis, it will display on the screen and be attached to the episode. <table border="1" style="margin: 10px auto; width: 80%; border-collapse: collapse;"> <thead> <tr style="background-color: #cccccc;"> <th style="width: 20%;">Primary Dx</th> <th style="width: 15%;">Code Type</th> <th style="width: 45%;">Diagnosis</th> <th style="width: 20%;">Actions</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">★</td> <td style="text-align: center;">ICD10</td> <td>I50.9--Heart failure, unspecified</td> <td></td> </tr> <tr> <td style="text-align: center;">☆</td> <td style="text-align: center;">ICD10</td> <td>R69--Illness, unspecified</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> | Primary Dx | Code Type | Diagnosis | Actions | ★ | ICD10 | I50.9--Heart failure, unspecified | | ☆ | ICD10 | R69--Illness, unspecified | - |
| Primary Dx | Code Type | Diagnosis | Actions | | | | | | | | | | |
| ★ | ICD10 | I50.9--Heart failure, unspecified | | | | | | | | | | | |
| ☆ | ICD10 | R69--Illness, unspecified | - | | | | | | | | | | |
| 4. | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #cccccc;"> <th style="width: 40%;">If you...</th> <th style="width: 60%;">Then...</th> </tr> </thead> <tbody> <tr> <td>want to add additional diagnoses</td> <td> Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon to remove a diagnosis from the request. - You cannot remove a diagnosis unless there is more than one diagnosis already selected - Click the Star ★ in the Primary Dx column if you need to designate a different diagnosis as primary. </td> </tr> <tr> <td>do not want to add additional diagnoses</td> <td>Proceed to the Providers section of the episode.</td> </tr> </tbody> </table> | If you... | Then... | want to add additional diagnoses | Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon to remove a diagnosis from the request. - You cannot remove a diagnosis unless there is more than one diagnosis already selected - Click the Star ★ in the Primary Dx column if you need to designate a different diagnosis as primary. | do not want to add additional diagnoses | Proceed to the Providers section of the episode. | | | | | | |
| If you... | Then... | | | | | | | | | | | | |
| want to add additional diagnoses | Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon to remove a diagnosis from the request. - You cannot remove a diagnosis unless there is more than one diagnosis already selected - Click the Star ★ in the Primary Dx column if you need to designate a different diagnosis as primary. | | | | | | | | | | | | |
| do not want to add additional diagnoses | Proceed to the Providers section of the episode. | | | | | | | | | | | | |

Adding a New OP Non-Clinical Request – Adding Providers

All Outpatient requests should contain a **Treating** provider (Facility or Agency providing the service) and a **Referring** provider (physician or group referring the member for services).

The steps below outline the processes for adding providers to the request.





| | |
|---|---|
|  | <p>Favorite Providers - You can utilize the Favorite Providers hyperlink to save time and keystrokes. The Favorite Providers list will allow you to create and manage a list of frequently used providers. Reference Chapter 9 “<i>Favorite Providers List–How to Create a Favorites List.</i>”</p> |
|---|---|

| Step | Action | | | | | | |
|----------------------------|---|----------------------------|---------|--------------|--------------------------------|-------------------------|--|
| 1. | <p>Click the Attach Providers button.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Provider Details <div style="border: 2px solid red; padding: 5px;"> Attach Providers </div> Favorite Providers </div> </div> | | | | | | |
| 2. | <p>Enter the appropriate search criteria and click on Search.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Attach Providers </div> <div style="background-color: #ffffcc; padding: 5px; margin-bottom: 5px;"> Enter any search criteria </div> <div style="border: 2px solid red; padding: 10px; margin-bottom: 5px;"> <div style="text-align: center; margin-bottom: 5px;">LOB</div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Provider Last Name / Facility <input style="width: 90%;" type="text" value="Last Name / Facility"/> <input type="button" value="Q"/></p> <p>NPIN <input style="width: 100%;" type="text"/></p> </div> <div style="width: 45%;"> <p>Provider First Name <input style="width: 90%;" type="text" value="Provider First Name"/> <input type="button" value="Q"/></p> <p>Provider ID <input style="width: 100%;" type="text"/></p> </div> </div> <div style="text-align: center; margin-top: 5px;"> Search Advanced Search </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> Attach Cancel </div> </div> | | | | | | |
| 3. | <p>After clicking Search:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">If appropriate provider...</th> <th style="text-align: center;">Then...</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Is displayed</td> <td>Click the Attach button</td> </tr> <tr> <td style="text-align: center;"><i>Is not</i> displayed</td> <td> <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="text-align: center; margin-bottom: 5px;">LOB</div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Provider Last Name / Facility <input style="width: 90%;" type="text" value="Last Name / Facility"/> <input type="button" value="Q"/></p> <p>NPIN <input style="width: 100%;" type="text"/></p> <p>Provider Type: <input style="width: 90%;" type="text" value="--Select One--"/> <input type="button" value="v"/></p> <p>Tax ID <input style="width: 100%;" type="text"/></p> <p>City <input style="width: 100%;" type="text"/></p> <p>Provider Phone <input style="width: 100%;" type="text"/></p> </div> <div style="width: 45%;"> <p>Provider First Name <input style="width: 90%;" type="text" value="Provider First Name"/> <input type="button" value="Q"/></p> <p>Provider ID <input style="width: 100%;" type="text"/></p> <p>Specialty: <input style="width: 90%;" type="text" value="--Select One--"/> <input type="button" value="v"/></p> <p>State: <input style="width: 90%;" type="text" value="--Select One--"/> <input type="button" value="v"/></p> <p>County <input style="width: 100%;" type="text"/></p> <p>Network: <input style="width: 90%;" type="text" value="--Select One--"/> <input type="button" value="v"/></p> </div> </div> <div style="text-align: center; margin-top: 5px;"> Search Basic Search </div> </div> </td> </tr> </tbody> </table> | If appropriate provider... | Then... | Is displayed | Click the Attach button | <i>Is not</i> displayed | <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="text-align: center; margin-bottom: 5px;">LOB</div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Provider Last Name / Facility <input style="width: 90%;" type="text" value="Last Name / Facility"/> <input type="button" value="Q"/></p> <p>NPIN <input style="width: 100%;" type="text"/></p> <p>Provider Type: <input style="width: 90%;" type="text" value="--Select One--"/> <input type="button" value="v"/></p> <p>Tax ID <input style="width: 100%;" type="text"/></p> <p>City <input style="width: 100%;" type="text"/></p> <p>Provider Phone <input style="width: 100%;" type="text"/></p> </div> <div style="width: 45%;"> <p>Provider First Name <input style="width: 90%;" type="text" value="Provider First Name"/> <input type="button" value="Q"/></p> <p>Provider ID <input style="width: 100%;" type="text"/></p> <p>Specialty: <input style="width: 90%;" type="text" value="--Select One--"/> <input type="button" value="v"/></p> <p>State: <input style="width: 90%;" type="text" value="--Select One--"/> <input type="button" value="v"/></p> <p>County <input style="width: 100%;" type="text"/></p> <p>Network: <input style="width: 90%;" type="text" value="--Select One--"/> <input type="button" value="v"/></p> </div> </div> <div style="text-align: center; margin-top: 5px;"> Search Basic Search </div> </div> |
| If appropriate provider... | Then... | | | | | | |
| Is displayed | Click the Attach button | | | | | | |
| <i>Is not</i> displayed | <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="text-align: center; margin-bottom: 5px;">LOB</div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Provider Last Name / Facility <input style="width: 90%;" type="text" value="Last Name / Facility"/> <input type="button" value="Q"/></p> <p>NPIN <input style="width: 100%;" type="text"/></p> <p>Provider Type: <input style="width: 90%;" type="text" value="--Select One--"/> <input type="button" value="v"/></p> <p>Tax ID <input style="width: 100%;" type="text"/></p> <p>City <input style="width: 100%;" type="text"/></p> <p>Provider Phone <input style="width: 100%;" type="text"/></p> </div> <div style="width: 45%;"> <p>Provider First Name <input style="width: 90%;" type="text" value="Provider First Name"/> <input type="button" value="Q"/></p> <p>Provider ID <input style="width: 100%;" type="text"/></p> <p>Specialty: <input style="width: 90%;" type="text" value="--Select One--"/> <input type="button" value="v"/></p> <p>State: <input style="width: 90%;" type="text" value="--Select One--"/> <input type="button" value="v"/></p> <p>County <input style="width: 100%;" type="text"/></p> <p>Network: <input style="width: 90%;" type="text" value="--Select One--"/> <input type="button" value="v"/></p> </div> </div> <div style="text-align: center; margin-top: 5px;"> Search Basic Search </div> </div> | | | | | | |




Adding a New OP Non-Clinical Request – Adding Providers (cont.)



| Search Results | | | | | | |
|----------------|---------------|--------------|-----------------|---------------|---------|--|
| Provider ID | Provider Name | Location | Type | Provider Role | Partici | |
| 0000000 | Hospital A | Any City, PA | Facility/Vendor | Treating | | |

-  Single Attach
-  Multiple Attach
-  Set as Favorite

| Step | Action |
|------|---|
| 4. | <ul style="list-style-type: none"> Search for the facility. Once you have located the facility, select “Treating” from the drop-down list in the Provider Role column, click the  icon next to the provider row and select  Single Attach to attach the provider to the episode. <p>Result: The Provider will be attached and listed in the Providers section of the episode.</p> |
| 5. | <ul style="list-style-type: none"> Search for the attending physician. Once you have located the physician, select “Referring” from the drop-down list in the Provider Role column, click the  icon next to the provider row and select  Single Attach to attach the provider to the episode. <p>Result: The Provider will be attached and listed in the Providers section of the episode.</p> |



| If you want to ... | Then... |
|---|---|
| <p><u>Attach multiple providers to an episode at the same time</u></p> | <p>Follow the steps outlined below:</p> <ul style="list-style-type: none"> Search for the desired providers In the row of each desired provider in the search results screen, select the appropriate Provider Role from the drop-down list, click the  icon next to the row and select the  Multiple Attach option As each provider is selected, they will be added to the “Selected Providers List” at the bottom of the screen When all providers have been added, verify the selected Provider Role and click the  Attach button to add them to the episode. |

| Provider Details | ID | Name | Location | Role | Network | Phone | Action |
|------------------|----|------------|----------|-----------|---------|-------|---|
| | | Provider A | | Referring | | |  |
| | | Provider B | | Treating | | |  |

NOTE:

- If the incorrect provider is attached, click the **Deactivate** icon  to deactivate the facility. The facility will be removed from the episode.

Adding a New OP Non-Clinical Request – Adding Service Request

You will need to complete the **Service/Specialty Drug Request** section.



Favorite Services - You can utilize the Favorite Services hyperlink to save time and keystrokes. The **Favorite Services** list will allow you to create and manage a list of frequently used services. Reference Chapter 9 “*Favorite Services List–How to Create a Favorites List.*”

| | | | | |
|--------------------------------|------------------|---|--------------|-----------------|
| Service/Specialty Drug Request | Service Type * | --Select One-- | Modifier | Search Modifier |
| | Place of Service | Medical | Start Date * | |
| | Code Type * | CPT | End Date * | |
| | Service Code * | Search Service Code | Requested # | 1 |
| | | Advanced Search Favorite Services | Units | 1 |
| | | Optional Fields | | |
| | UCR Cost | \$ | | |
| | Time Frame | Per Day | | |
| | Time period | 1 | | |
| | | Add | | |

| Step | Action | | | | | | | | | | | | | | | | | | | | | | |
|-------------------------|--|---------------------|---|-------------------------|---|------------------|---|---------------------|---|-----------------|---------------------------------------|-------------------|---|-----------------|-----------------------------------|--------------------|------------------------------------|-------------------|----------------------|--------------------|----------------|---------------------|--|
| 1. | <p>Complete information in the Service Request section (<i>if applicable</i>) using the guidelines outlined below:</p> <table border="1"> <tr> <td>Service Type</td> <td>Choose the appropriate selection from the drop-down list.</td> </tr> <tr> <td>Place of Service</td> <td>Choose the appropriate selection from the drop-down list.</td> </tr> <tr> <td>Code Type</td> <td>Auto-populated to CPT, update if necessary.</td> </tr> <tr> <td>Service Code</td> <td>Enter the requested service code. Note: You can type the service code or a description of the code. As information is typed, the auto coder will automatically display matches in the drop-down list. Select the appropriate service from the list. You can also use the Advanced Search link to initiate a search for the service code.</td> </tr> <tr> <td>Modifier</td> <td>Enter modifier details as appropriate</td> </tr> <tr> <td>Start Date</td> <td>Enter the date of the requested service</td> </tr> <tr> <td>End Date</td> <td>Enter the end date of the service</td> </tr> <tr> <td>Requested #</td> <td>Enter the appropriate units/visits</td> </tr> </table> <p>To view these fields, you may need to click on the Optional Fields hyperlink.</p> <table border="1"> <tr> <td>Time Frame</td> <td>Defaults to Per Day.</td> </tr> <tr> <td>Time Period</td> <td>Defaults to 1.</td> </tr> <tr> <td>Units/Visits</td> <td>Defaults to 1. Enter the appropriate units/visits.</td> </tr> </table> | Service Type | Choose the appropriate selection from the drop-down list. | Place of Service | Choose the appropriate selection from the drop-down list. | Code Type | Auto-populated to CPT, update if necessary. | Service Code | Enter the requested service code. Note: You can type the service code or a description of the code. As information is typed, the auto coder will automatically display matches in the drop-down list. Select the appropriate service from the list. You can also use the Advanced Search link to initiate a search for the service code. | Modifier | Enter modifier details as appropriate | Start Date | Enter the date of the requested service | End Date | Enter the end date of the service | Requested # | Enter the appropriate units/visits | Time Frame | Defaults to Per Day. | Time Period | Defaults to 1. | Units/Visits | Defaults to 1. Enter the appropriate units/visits. |
| Service Type | Choose the appropriate selection from the drop-down list. | | | | | | | | | | | | | | | | | | | | | | |
| Place of Service | Choose the appropriate selection from the drop-down list. | | | | | | | | | | | | | | | | | | | | | | |
| Code Type | Auto-populated to CPT, update if necessary. | | | | | | | | | | | | | | | | | | | | | | |
| Service Code | Enter the requested service code. Note: You can type the service code or a description of the code. As information is typed, the auto coder will automatically display matches in the drop-down list. Select the appropriate service from the list. You can also use the Advanced Search link to initiate a search for the service code. | | | | | | | | | | | | | | | | | | | | | | |
| Modifier | Enter modifier details as appropriate | | | | | | | | | | | | | | | | | | | | | | |
| Start Date | Enter the date of the requested service | | | | | | | | | | | | | | | | | | | | | | |
| End Date | Enter the end date of the service | | | | | | | | | | | | | | | | | | | | | | |
| Requested # | Enter the appropriate units/visits | | | | | | | | | | | | | | | | | | | | | | |
| Time Frame | Defaults to Per Day. | | | | | | | | | | | | | | | | | | | | | | |
| Time Period | Defaults to 1. | | | | | | | | | | | | | | | | | | | | | | |
| Units/Visits | Defaults to 1. Enter the appropriate units/visits. | | | | | | | | | | | | | | | | | | | | | | |

Adding a New OP Non-Clinical Request – Adding Service Request, cont.

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-----------------|--|-----------------|------------|------------|--------------|------------------|--|--|--------|--------------|------------|------------|----------|--------------|------------------|---|-------------|---|------------|------------|------|---------|---|-------------|----|------------|------------|------|---------|
| 2. | <p>Click the Add button.</p> <p>Result: The Service Request line will now be populated (appears below the Service Request fields)</p> <table border="1" data-bbox="233 359 1516 600"> <thead> <tr> <th colspan="7" data-bbox="233 359 1516 405">Service Request</th> </tr> <tr> <th data-bbox="233 405 431 468">Action</th> <th data-bbox="431 405 621 468">Service Code</th> <th data-bbox="621 405 805 468">Requested#</th> <th data-bbox="805 405 964 468">Start Date</th> <th data-bbox="964 405 1118 468">End Date</th> <th data-bbox="1118 405 1300 468">Service Type</th> <th data-bbox="1300 405 1516 468">Place of Service</th> </tr> </thead> <tbody> <tr> <td data-bbox="233 468 431 531">-</td> <td data-bbox="431 468 621 531">G0493(HCPC)</td> <td data-bbox="621 468 805 531">5</td> <td data-bbox="805 468 964 531">08/17/2020</td> <td data-bbox="964 468 1118 531">09/01/2020</td> <td data-bbox="1118 468 1300 531">Home</td> <td data-bbox="1300 468 1516 531">Medical</td> </tr> <tr> <td data-bbox="233 531 431 600">-</td> <td data-bbox="431 531 621 600">S9131(HCPC)</td> <td data-bbox="621 531 805 600">14</td> <td data-bbox="805 531 964 600">08/19/2020</td> <td data-bbox="964 531 1118 600">09/02/2020</td> <td data-bbox="1118 531 1300 600">Home</td> <td data-bbox="1300 531 1516 600">Medical</td> </tr> </tbody> </table> <p>Note: If a Service Request was added in error or with incorrect information, you may click the icon in the Action column to remove the given line.</p> | Service Request | | | | | | | Action | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | - | G0493(HCPC) | 5 | 08/17/2020 | 09/01/2020 | Home | Medical | - | S9131(HCPC) | 14 | 08/19/2020 | 09/02/2020 | Home | Medical |
| Service Request | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Action | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | | | | | | | | | | | | | | | | | | | | | | | |
| - | G0493(HCPC) | 5 | 08/17/2020 | 09/01/2020 | Home | Medical | | | | | | | | | | | | | | | | | | | | | | | |
| - | S9131(HCPC) | 14 | 08/19/2020 | 09/02/2020 | Home | Medical | | | | | | | | | | | | | | | | | | | | | | | |
| 3. | Repeat Steps 2 & 3 if additional service requests need to be added | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Adding a New OP Non-Clinical Request – Adding Documents

Follow these instructions to add a **Documents**.

| Step | Action | | | | | | | | | | | | |
|------------------|---|----------------------|---|----------------------|---|---------------|---|--|--|-----------------|---|--|--|
| 1. | <p>Complete the following:</p> <ol style="list-style-type: none">Document Title: enter the title of the documentDocument Type: defaults to Medical Document, update as needed.Document Description: optional fieldClick the Browse button to search for the document you wish to upload<ol style="list-style-type: none">Click the desired document and click the Open buttonYou will see the document name listed next to the Browse button. <div data-bbox="289 697 1479 869"><p>Documents</p><table><tr><td>Document Title *</td><td><input type="text" value="Clinical Information"/></td><td>Document Description</td><td><input type="text" value="Can enter a document description here."/></td></tr><tr><td>Document Type</td><td><input type="text" value="Medical Document"/> ▼</td><td></td><td></td></tr><tr><td>Select Document</td><td><input type="button" value="Browse"/> <input type="text" value="PP Example Document.docx"/></td><td></td><td></td></tr></table></div> | Document Title * | <input type="text" value="Clinical Information"/> | Document Description | <input type="text" value="Can enter a document description here."/> | Document Type | <input type="text" value="Medical Document"/> ▼ | | | Select Document | <input type="button" value="Browse"/> <input type="text" value="PP Example Document.docx"/> | | |
| Document Title * | <input type="text" value="Clinical Information"/> | Document Description | <input type="text" value="Can enter a document description here."/> | | | | | | | | | | |
| Document Type | <input type="text" value="Medical Document"/> ▼ | | | | | | | | | | | | |
| Select Document | <input type="button" value="Browse"/> <input type="text" value="PP Example Document.docx"/> | | | | | | | | | | | | |

Adding a New OP Non-Clinical Request – Adding Notes

Notes

Note Type: --Select One--

Note Encounter Date: 08/13/2020

Note Encounter Time: 08:49

Note Text

File Edit View Format Tools

B *I* U ABC

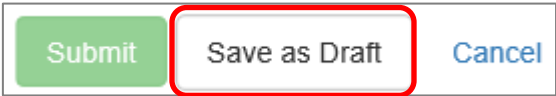

| Step | Action |
|------|--|
| 1. | Select the appropriate Note Type from the drop-down menu. |
| 2. | Enter the appropriate notes in the notes section. Be sure to include your name and contact information in the event the Plan needs to contact you. |

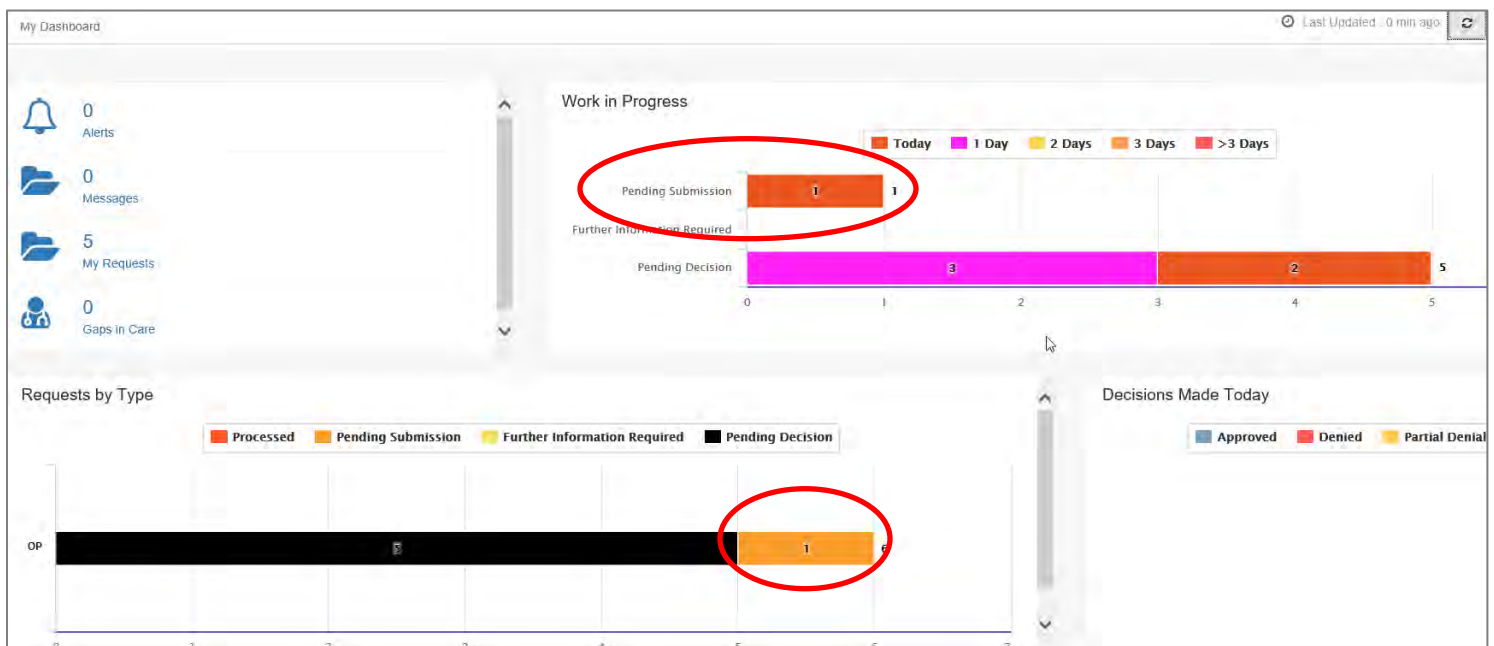


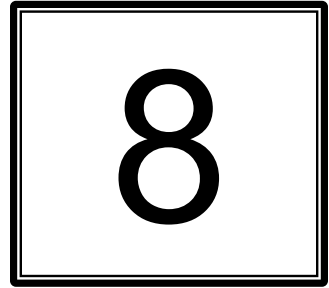
This is a shared note field. Notes can be viewed and entered by both you and the Plan.

Adding a New OP Non-Clinical Request – Saving as Draft

The **Non-clinical** request must be saved so it is available to access at a later time in order to add clinical data.

| Step | Action |
|------|---|
| 1. | <p>Click on the Save as Draft button to submit your request.</p>  <p>Note: The Submit button will not be active until a clinical review has been completed.</p> |
| 2. | <p>You will be taken to the top of the request where you will see that it is now in Draft status (upper left corner).</p>  |
| 3. | <p>You may click on Dashboard to exit the request where you see the request displayed as Pending Submission in the Work in Progress and Requests by Type widgets.</p> |



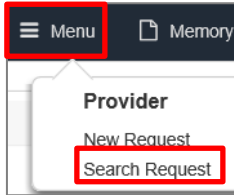
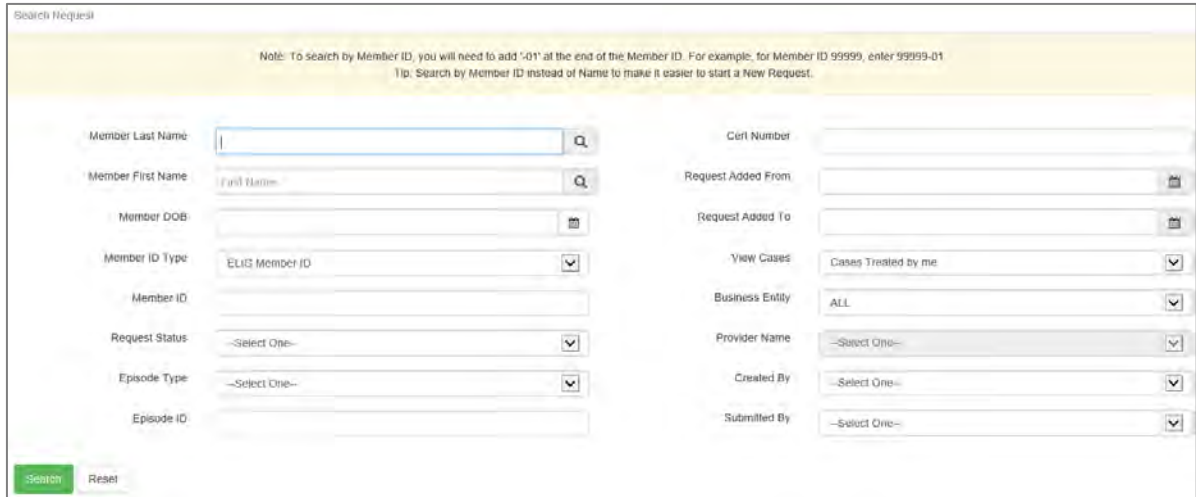


8 ADD CLINICAL TO AN EXISTING OP NON-CLINICAL REQUEST

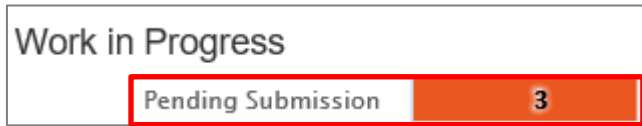
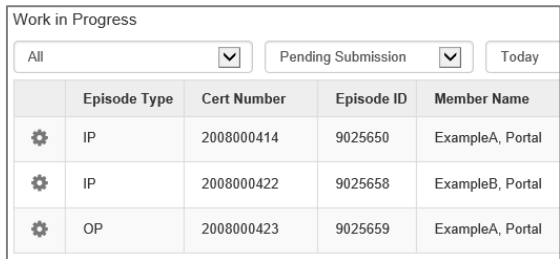
Adding Clinical Information to an Existing OP Non-clinical Request

There are three options for accessing the non-clinical request.

Option #1: Search Request

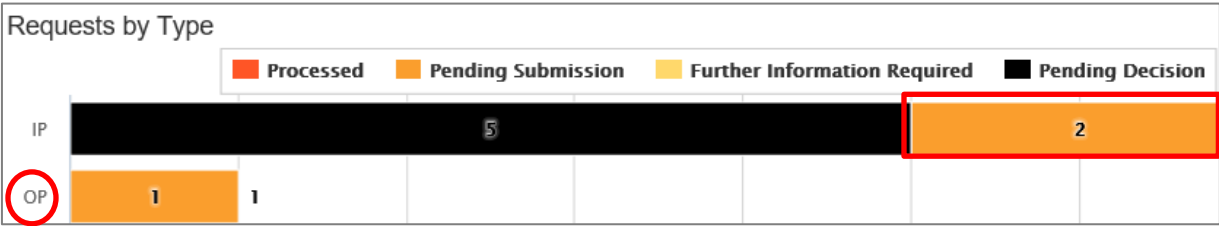
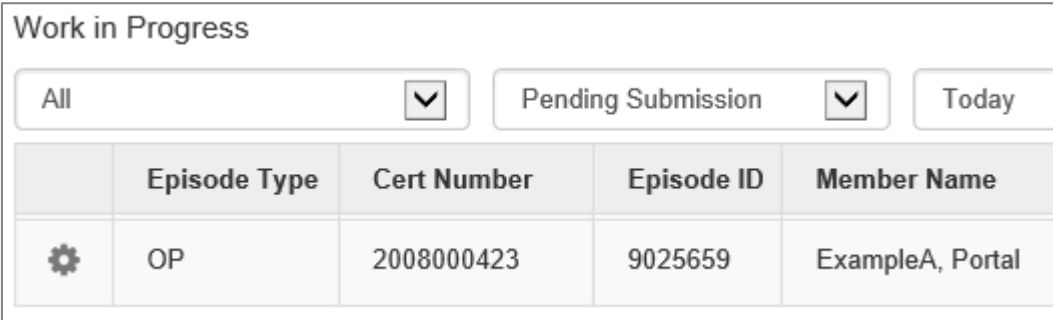
| Step | Action |
|------|--|
| 1. | <p>Click on Menu and select Search Request</p>  |
| 2. | <p>Enter the appropriate search criteria and click on the Search button.</p>  |
| 3. | <p>What results display will be based on the refinement of the search criteria.</p> <p>Note: <i>Only those episodes for which you are either the Treating or Attending will be displayed.</i></p> |

Option #2: Dashboard – Work in Progress Widget

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------|--|------------------|------------|------------------|--|--|-----|--|--|--|--|--------------------|--|--|--|--|-------|--|--|--|--|--|--------------|-------------|------------|-------------|---|----|------------|---------|------------------|---|----|------------|---------|------------------|---|----|------------|---------|------------------|
| 1. | <p>Click on the Pending Submission hyperlink bar in the <i>Work in Progress</i> widget</p>  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. | <p>All Pending Submission requests, regardless of Episode Type, will be displayed.</p>  <table border="1"> <thead> <tr> <th colspan="5">Work in Progress</th> </tr> <tr> <th colspan="5">All</th> </tr> <tr> <th colspan="5">Pending Submission</th> </tr> <tr> <th colspan="5">Today</th> </tr> <tr> <th></th> <th>Episode Type</th> <th>Cert Number</th> <th>Episode ID</th> <th>Member Name</th> </tr> </thead> <tbody> <tr> <td>⚙</td> <td>IP</td> <td>2008000414</td> <td>9025650</td> <td>ExampleA, Portal</td> </tr> <tr> <td>⚙</td> <td>IP</td> <td>2008000422</td> <td>9025658</td> <td>ExampleB, Portal</td> </tr> <tr> <td>⚙</td> <td>OP</td> <td>2008000423</td> <td>9025659</td> <td>ExampleA, Portal</td> </tr> </tbody> </table> | Work in Progress | | | | | All | | | | | Pending Submission | | | | | Today | | | | | | Episode Type | Cert Number | Episode ID | Member Name | ⚙ | IP | 2008000414 | 9025650 | ExampleA, Portal | ⚙ | IP | 2008000422 | 9025658 | ExampleB, Portal | ⚙ | OP | 2008000423 | 9025659 | ExampleA, Portal |
| Work in Progress | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| All | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pending Submission | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Today | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Episode Type | Cert Number | Episode ID | Member Name | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ⚙ | IP | 2008000414 | 9025650 | ExampleA, Portal | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ⚙ | IP | 2008000422 | 9025658 | ExampleB, Portal | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ⚙ | OP | 2008000423 | 9025659 | ExampleA, Portal | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |


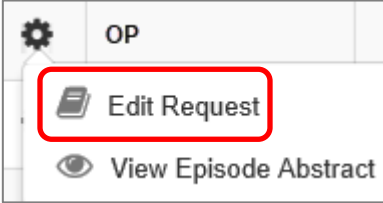
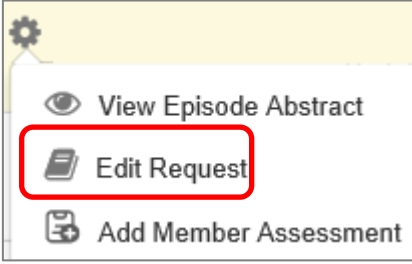
Adding Clinical Information to Existing OP Non-Clinical Request, continued

Option #3: Dashboard – Requests by Type Widget

| Step | Action | | | | | | | | | | |
|------|---|-------------|--------------|------------------|------------|-------------|----|----|------------|---------|------------------|
| 1. | <p>Click on the Pending Submission hyperlink bar in the <i>Request by Type</i> widget</p>  <p>Requests by Type</p> <p>Processed Pending Submission Further Information Required Pending Decision</p> <p>IP [Redacted] 5</p> <p>OP 1 1</p> | | | | | | | | | | |
| 2. | <p>All Pending Submission requests for that Episode Type will be displayed.</p>  <p>Work in Progress</p> <p>All Pending Submission Today</p> <table border="1"> <thead> <tr> <th></th> <th>Episode Type</th> <th>Cert Number</th> <th>Episode ID</th> <th>Member Name</th> </tr> </thead> <tbody> <tr> <td>⚙️</td> <td>OP</td> <td>2008000423</td> <td>9025659</td> <td>ExampleA, Portal</td> </tr> </tbody> </table> | | Episode Type | Cert Number | Episode ID | Member Name | ⚙️ | OP | 2008000423 | 9025659 | ExampleA, Portal |
| | Episode Type | Cert Number | Episode ID | Member Name | | | | | | | |
| ⚙️ | OP | 2008000423 | 9025659 | ExampleA, Portal | | | | | | | |

Adding Clinical Information to Existing OP Non-Clinical Request – Edit Request

Follow these steps to open the request for editing.

| Step | Action |
|------|--|
| 1. | <p>Click on the  icon to the left of the episode and select Edit Request.</p> <div data-bbox="253 405 634 606"><p>The screenshot shows a header for an 'OP' episode. On the left side, there is a gear icon. Below it, there are two buttons: 'Edit Request' (with a document icon) and 'View Episode Abstract' (with an eye icon). The 'Edit Request' button is circled in red.</p></div> <div data-bbox="696 350 1105 611"><p>The screenshot shows a dropdown menu that appears after clicking the gear icon. It has a yellow background and contains three options: 'View Episode Abstract' (with an eye icon), 'Edit Request' (with a document icon), and 'Add Member Assessment' (with a person icon). The 'Edit Request' option is circled in red.</p></div> <p>Note: Depending on how you accessed the episode, you may see different options under the gear.</p> |
| 2. | The request will open and is read to be updated. |


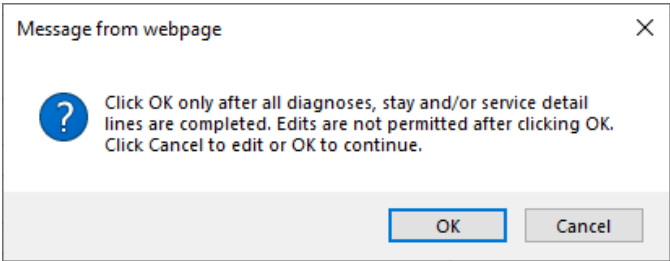
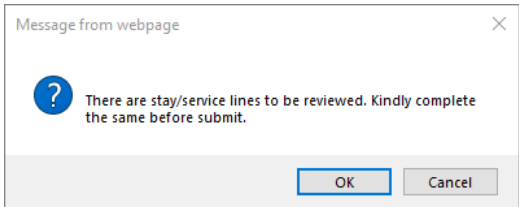
Adding Clinical Information to Existing OP Non-Clinical Request – InterQual

Access and complete InterQual Connect Clinical Criteria


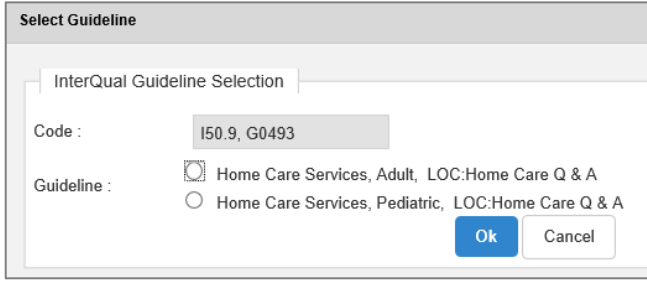
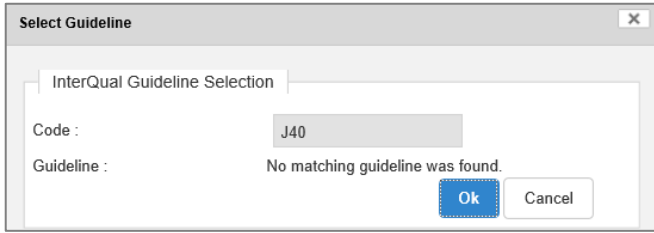
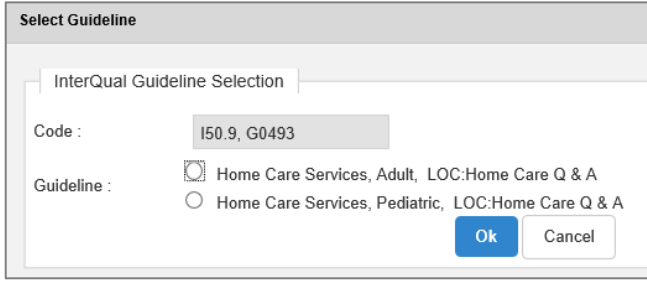
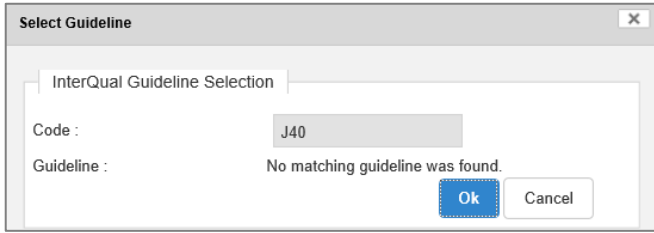
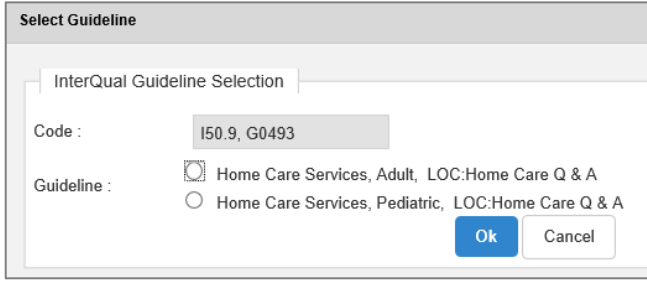
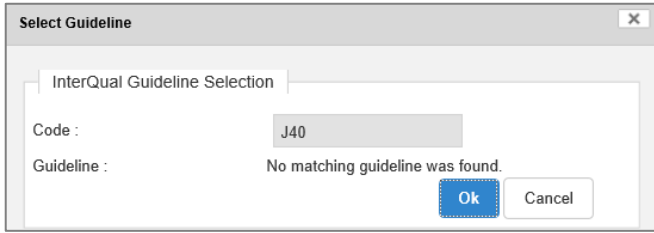


If you need training or have questions regarding the use of InterQual Connect criteria, please contact your facility InterQual trainer or contact your Change HealthCare account representative.

The health plan is certified to conduct training for internal associates only.

| Step | Action |
|------|---|
| 1. | <p>Click the Check for Review button.</p>  |
| 2. | <p>You will receive the following message. Click OK <u>only</u> if you completed the items listed.</p>  <p>Result: The system will run a diagnostic review of the request to determine if a Stay Request and/or a Service Request is associated with it.</p> <p>Note: The Check for Review button is disabled in the following scenarios:</p> <ul style="list-style-type: none"> • When stay and service lines can be processed by Sentinel rules. Based on the sentinel auto-approval rule, the Decision and Reason for Decision are as follows: <ul style="list-style-type: none"> ○ Pending and Auto Pended ○ Approved and Auto Approval <p>When medical review is not supported based on the service code, diagnosis code, and episode type, the decision is displayed as Pending and the Reason for Decision is displayed as Medical Review Not Required. Manual review is required in this case.</p> |
| 3. | <p>Once determined that one or both exists, you will receive the following pop-up message. Click OK.</p>  |

Adding Clinical Information to Existing OP Non-clinical Request – InterQual, cont.

| Step | Action | | | | | | | | | | | | | | | | |
|-------------------------------------|---|----------------|--------------|----------------------------------|--|-------------------------------------|--|------------------|---------------|-------------------------------------|------------|---|------------|------------|-----------|---------|--|
| 4. | <p>Click the Review button.</p>  <p>The screenshot shows a green 'Review' button and a table titled 'Service Request' with the following data:</p> <table border="1" data-bbox="245 432 1356 533"> <thead> <tr> <th>Action</th> <th>Service Code</th> <th>Requested#</th> <th>Start Date</th> <th>End Date</th> <th>Service Type</th> <th>Place of Service</th> <th>Review Status</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>93352(CPT)</td> <td>1</td> <td>08/12/2020</td> <td>08/13/2020</td> <td>Inpatient</td> <td>Medical</td> <td></td> </tr> </tbody> </table> | Action | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | Review Status | <input checked="" type="checkbox"/> | 93352(CPT) | 1 | 08/12/2020 | 08/13/2020 | Inpatient | Medical | |
| Action | Service Code | Requested# | Start Date | End Date | Service Type | Place of Service | Review Status | | | | | | | | | | |
| <input checked="" type="checkbox"/> | 93352(CPT) | 1 | 08/12/2020 | 08/13/2020 | Inpatient | Medical | | | | | | | | | | | |
| 5. | <p>The system will connect with InterQual and determine if there is a matching guideline.</p> <table border="1" data-bbox="240 638 1555 1377"> <thead> <tr> <th data-bbox="240 638 581 680">If there is...</th> <th data-bbox="581 638 1555 680">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 680 581 1054"> <p>Matching Guideline</p> </td> <td data-bbox="581 680 1555 1054"> <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. Proceed to Step 6 in this section.</p>  <p>The screenshot shows a 'Select Guideline' window with the following details:</p> <ul style="list-style-type: none"> Code: 150.9, G0493 Guideline: <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q & A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q & A </td> </tr> <tr> <td data-bbox="240 1054 581 1377"> <p>No Matching Guideline</p> </td> <td data-bbox="581 1054 1555 1377"> <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. Proceed to Adding Documents.</p>  <p>The screenshot shows a 'Select Guideline' window with the following details:</p> <ul style="list-style-type: none"> Code: J40 Guideline: No matching guideline was found. </td> </tr> </tbody> </table> | If there is... | Then... | <p>Matching Guideline</p> | <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. Proceed to Step 6 in this section.</p>  <p>The screenshot shows a 'Select Guideline' window with the following details:</p> <ul style="list-style-type: none"> Code: 150.9, G0493 Guideline: <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q & A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q & A | <p>No Matching Guideline</p> | <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. Proceed to Adding Documents.</p>  <p>The screenshot shows a 'Select Guideline' window with the following details:</p> <ul style="list-style-type: none"> Code: J40 Guideline: No matching guideline was found. | | | | | | | | | | |
| If there is... | Then... | | | | | | | | | | | | | | | | |
| <p>Matching Guideline</p> | <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. Proceed to Step 6 in this section.</p>  <p>The screenshot shows a 'Select Guideline' window with the following details:</p> <ul style="list-style-type: none"> Code: 150.9, G0493 Guideline: <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q & A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q & A | | | | | | | | | | | | | | | | |
| <p>No Matching Guideline</p> | <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. Proceed to Adding Documents.</p>  <p>The screenshot shows a 'Select Guideline' window with the following details:</p> <ul style="list-style-type: none"> Code: J40 Guideline: No matching guideline was found. | | | | | | | | | | | | | | | | |

Adding Clinical Information to Existing OP Non-clinical Request – InterQual, cont.

| Step | Action | | | | | | |
|-----------------|---|-----------------|---------|-------------|--|-----------------|---|
| 6. | After answering the review questions, the Recommendations page will display either Criteria Met or Criteria Not Met . | | | | | | |
| 7. | From the Recommendations page: <table border="1" data-bbox="240 422 1555 590"> <thead> <tr> <th data-bbox="240 422 440 464">If you click...</th> <th data-bbox="440 422 1555 464">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 464 440 506">Save</td> <td data-bbox="440 464 1555 506">The review will be saved and can be updated, if needed, prior to submitting the request.</td> </tr> <tr> <td data-bbox="240 506 440 590">Complete</td> <td data-bbox="440 506 1555 590">The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td> </tr> </tbody> </table> | If you click... | Then... | Save | The review will be saved and can be updated, if needed, prior to submitting the request. | Complete | The review will be saved and closed. It cannot be updated even if you have not yet submitted the request. |
| If you click... | Then... | | | | | | |
| Save | The review will be saved and can be updated, if needed, prior to submitting the request. | | | | | | |
| Complete | The review will be saved and closed. It cannot be updated even if you have not yet submitted the request. | | | | | | |
| 8. | Close the InterQual tab to return to the Provider Portal | | | | | | |
| 9. | The request line will now display a status in the Decision column. | | | | | | |

Adding Clinical Information to Existing OP Non-Clinical Request – Assessments

If an assessment is associated with the request, an **Assessment** section will be displayed where you may access and complete the associated assessment.

| Step | Action |
|------|--|
| 1. | In the New Tab of the Assessment section, click on the gear icon to the left of the Assessment and click on Start . |
| 2. | Answer the questions. Note - Questions in red are mandatory. |
| 3. | Click the Complete button to complete the assessment. Note - This will trigger any auto approval rules (if configured.) The Save button will not trigger the auto approval rules. |

Adding Clinical Information to Existing OP Non-Clinical Request – Adding Documents

When submitting an **OP Clinical Request**, you must attach the clinical information. Follow these instructions to add a **Documents**.

| Step | Action | | | | | | | | | | | | |
|------------------|--|----------------------|---|----------------------|---|---------------|---|--|--|-----------------|--|--|--|
| 1. | <p>Complete the following:</p> <ul style="list-style-type: none">f. Document Title: enter the title of the documentg. Document Type: defaults to Medical Document, update as needed.h. Document Description: optional fieldi. Click the Browse button to search for the document you wish to upload<ul style="list-style-type: none">vi. Click the desired document and click the Open buttonj. You will see the document name listed next to the Browse button. <div data-bbox="289 772 1479 947" style="border: 1px solid gray; padding: 10px;"><p>Documents</p><table><tr><td>Document Title *</td><td><input type="text" value="Clinical Information"/></td><td>Document Description</td><td><input type="text" value="Can enter a document description here."/></td></tr><tr><td>Document Type</td><td><input type="text" value="Medical Document"/> ▼</td><td></td><td></td></tr><tr><td>Select Document</td><td><input type="button" value="Browse"/> PP Example Document.docx</td><td></td><td></td></tr></table></div> | Document Title * | <input type="text" value="Clinical Information"/> | Document Description | <input type="text" value="Can enter a document description here."/> | Document Type | <input type="text" value="Medical Document"/> ▼ | | | Select Document | <input type="button" value="Browse"/> PP Example Document.docx | | |
| Document Title * | <input type="text" value="Clinical Information"/> | Document Description | <input type="text" value="Can enter a document description here."/> | | | | | | | | | | |
| Document Type | <input type="text" value="Medical Document"/> ▼ | | | | | | | | | | | | |
| Select Document | <input type="button" value="Browse"/> PP Example Document.docx | | | | | | | | | | | | |

Adding Clinical Information to Existing OP Non-Clinical Request – Adding Notes

Notes

Note Type: --Select One--

Note Encounter Date: 08/13/2020

Note Encounter Time: 08:49

Note Text

File Edit View Format Tools

B *I* U ABC ✓

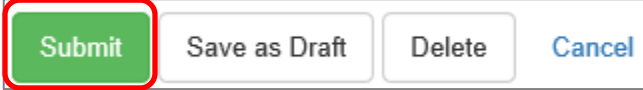
| Step | Action |
|------|--|
| 1. | Select the appropriate Note Type from the drop-down menu. |
| 2. | Enter the appropriate notes in the notes section. Be sure to include your name and contact information in the event the Plan needs to contact you. |



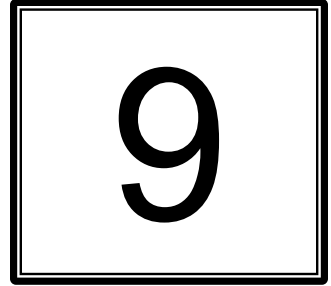
This is a shared note field. Notes can be viewed and entered by both you and the Plan.

Adding Clinical Information to Existing OP Non-Clinical Request – Submitting Request

Once all required sections are completed, you are ready to submit the request.

| Step | Action |
|------|--|
| 1. | <p>Click on the Submit button to submit your request.</p>  <p>Note: The Submit button will not be active until a clinical review has been completed.</p> |
| 2. | <p>The Request Details information will be displayed, including the Cert Number.</p> <p>Note: If the request is programmed to auto-approve, you will see Approved in the Decision column.</p> |

| Request Details | | | | | | | | | | |
|--------------------------|--------------|------------------------------|------------|--------------------------|-----------------|------------------------------|--------------|------------------------|----------|--|
| Episode Abstract | | | | | | | | | | |
| Expected Decision Date : | | Authorization Type OP | | Episode Number : 9025648 | | Episode Status : OpenRequest | | Cert Number 2008000412 | | |
| 08/15/2020 | | | | | | | | | | |
| Authorization Details | | | | | | | | | | |
| Service ID | Service Code | Requested # | Assigned # | Denied | Auth Start Date | Auth End Date | Service Type | Frequency | Decision | |
| 12548538 | 27428(CPT) | 1 | 0 | 0 | | | Inpatient | Per Day | Pending | |



9 ADDITIONAL PROCESSES

Search for Determination

Search Request

Note: To search by Member ID, you will need to add '-01' at the end of the Member ID. For example, for Member ID 99999, enter 99999-01.
Tip: Search by Member ID instead of Name to make it easier to start a New Request.

Member Last Name:

Member First Name:

Member DOB:

Member ID Type:

Member ID:

Request Status:

Episode Type:

Episode ID:

Cert Number:

Request Added From:

Request Added To:

View Cases:

Business Entity:

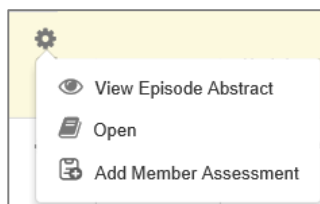
Provider Name:

Created By:

Submitted By:

| Action | Episode ID | Member Name | Episode Type | Date of Service | Cert Number | Diagnosis | Created By | Submitted By | Initial Due Date | Status | Decision | Decision Reason |
|--------|------------|------------------|--------------|-----------------|-------------|---|----------------|----------------|------------------|--------------------|----------|----------------------------|
| | 9026508 | ExampleA, Portal | IP | 09/14/2020 | 92009000160 | J40 (Bronchitis, not specified as acute or chronic) | Westre, Kristi | Westre, Kristi | | Pending Decision | Pending | |
| | 9026454 | ExampleA, Portal | IP | 09/10/2020 | 92009000124 | R69 (Illness, unspecified) | Westre, Kristi | | | Pending Submission | | |
| | 9025648 | ExampleA, Portal | IP | 08/13/2020 | 2008000412 | M13.169 (Monoarthritis, not elsewhere classified, unspecified knee) | Westre, Kristi | Westre, Kristi | | Processed | Approved | Clinical Reviewer Approval |

| Step | Action |
|------|---|
| 1. | Click Menu and select Search Request |
| 2. | Enter the “certification number” in the Cert Number field. Note – You can also search using the member ID or name/DOB. |
| 3. | Select “ Cases Treated By Me ” from the View Cases drop down box. |
| 4. | Verify that “ All ” is in the Business Entity field. |
| 5. | Click the Search button. |
| 6. | The determination will be in the Decision column (Approved, Pending or Denied). |
| 7. | Clicking on the gear icon in the Action column will allow you to do the following: |



Extending an Existing Request

Closed Episodes will be accessible in a 'view only' format. If you would like to extend the request or add notes to a closed case, you will need to contact the Utilization Management Department to request to have the case reopened.

If the case is **Open**, you may follow the instructions below.

Search Request

Note: To search by Member ID, you will need to add '-01' at the end of the Member ID. For example, for Member ID 99999, enter 99999-01.
Tip: Search by Member ID instead of Name to make it easier to start a New Request.

Member Last Name:

Member First Name:

Member DOB:

Member ID Type:

Member ID:

Request Status:

Episode Type:

Episode ID:

Cert Number:

Request Added From:

Request Added To:


View Cases:

Business Entity:

Provider Name:

Created By:

Submitted By:

| Action | Episode ID | Member Name | Episode Type | Date of Service | Cert Number | Diagnosis | Created By | Submitted By | Initial Due Date | Status | Decision | Decision Reason |
|---|------------|------------------|--------------|-----------------|-------------|--------------------------------------|----------------|----------------|------------------|-----------|----------|----------------------------|
|  | 9026532 | ExampleB, Portal | IP | 09/15/2020 | 92009000176 | I50.9 (Heart failure, unspecified) | Westre, Kristi | Westre, Kristi | | Processed | Approved | Clinical Reviewer Approval |

| Step | Action |
|------|---|
| 1. | Click Menu and select Search Request |
| 2. | Enter the "certification number" in the Cert Number field. Note – You can also search using the member ID or name/DOB. |
| 3. | Select " Cases Treated By Me " from the View Cases drop down box. |
| 4. | Verify that " All " is in the Business Entity field. |
| 5. | Click the Search button. |
| 6. | Click the gear icon in the Action column and select Open |

Extending an Existing Request, cont.

Member Overview > IP(9026532)

Status: OpenRequest | Primary Dx: J40 | Assigned To: Waste, Kristi | Assigned Reviewer: | Cert Number: 92009000173 | Auth Coverage: Keystone First - Adult Medicaid 21 and Over

Buttons: Review, **Extension**, Add

| Stay Request | Treatment Type | Due Date | Decision | Reason for Decision | Auth Start Date | Auth End D |
|-------------------------------------|----------------|----------|------------------|---------------------|----------------------------|-----------------------|
| <input checked="" type="checkbox"/> | Initial | Medical | 09/17/2020 09:03 | Approved | Clinical Reviewer Approval | 09/14/2020 09/15/2020 |

Page 1 of 1

| Step | Action |
|------|--|
| 1. | Select the line that needs to be extended. Note: You can only select one line at a time. |
| 2. | Click the Extension button |
| 3. | Complete the required fields with the appropriate information and click Save |

Buttons: **Save**, Cancel

| Treatment Setting | Treatment Type | Level of Care | LOS Requested # | Admit Date |
|----------------------|----------------|---------------|-----------------|------------|
| Hospital - Inpatient | Medical | | 1 | 09/14/2020 |

Requested Date * | 09/15/2020 | LOS Requested # * | 0

Request Received Time * | 09 | 27 | Requested Level Of Care | --Select One--

Request Type * | --Select One--

Request Priority * | --Select One--

Time Request

Due Date

Buttons: **Save**, Cancel

| | |
|----|---|
| 4. | After clicking Save, you will be returned to the episode where you will now see the Extension line. |
|----|---|

Member Overview > IP(9026532)

Status: OpenRequest | Primary Dx: I50.9 | Assigned To: IP Pending Cases | Assigned Reviewer: | Cert Number: 92009000176 | Auth Coverage: | Related Episodes

Buttons: Add

Immediate Due Date: 09/16/2020 10:11

| Stay Request | Treatment Type | Due Date | Decision | Reason for Decision |
|--------------------------|----------------|----------|------------------|--|
| <input type="checkbox"/> | Initial | Medical | 09/17/2020 10:05 | Approved Clinical Reviewer Approval |
| <input type="checkbox"/> | Extension | Medical | 09/16/2020 10:11 | - |

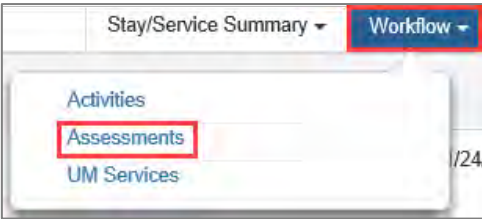
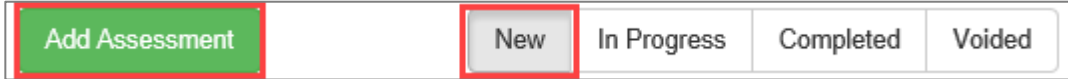
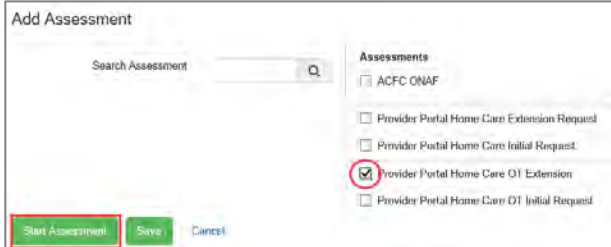
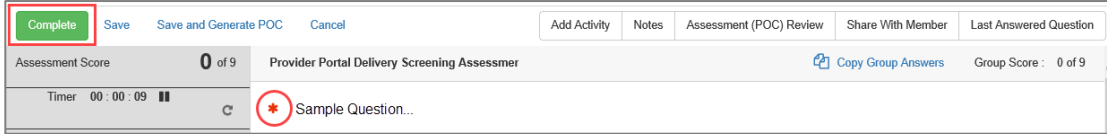
Diagnosis: ICD10 | I50.9--Heart failure, unspecified



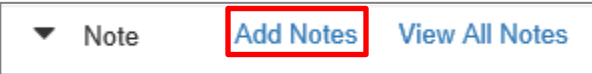
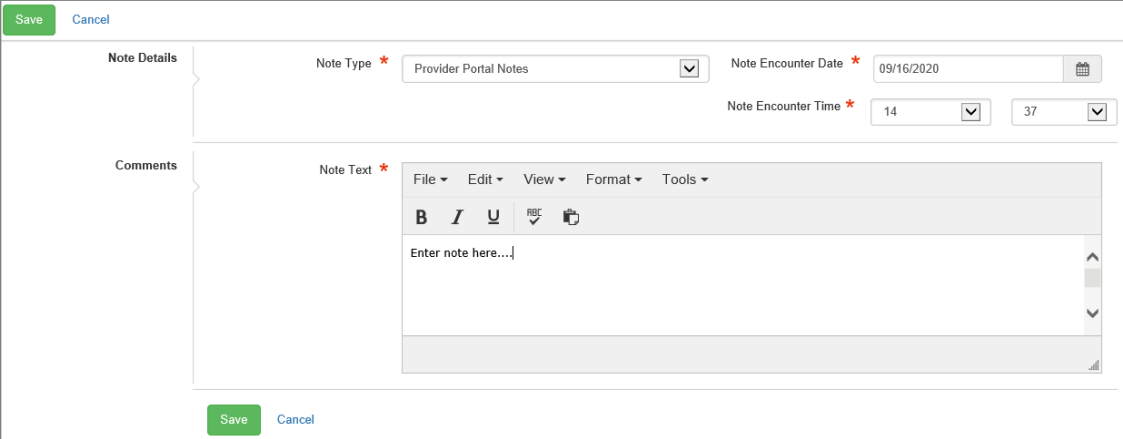
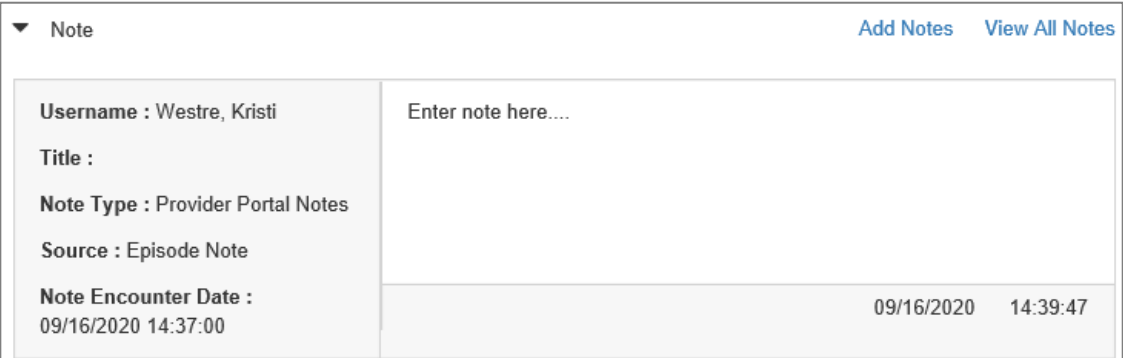
Clicking Save will submit your extension request. However, you must enter a note and attach any appropriate documentation to support the extension request.

Extending an Existing Request – Adding Assessments

If an assessment is to be completed, you will need to follow the guidelines below.

| Step | Action |
|------|--|
| 1. | <p>Click on Workflows in the upper right corner of the episode and click on the Assessments hyperlink.</p>  |
| | <p>In the New Tab of the Assessment section, click on the Add Assessment button.</p>  |
| | <p>Select the appropriate assessment and click on the Start Assessment button.</p>  |
| 2. | <p>Answer the questions.</p>  <p>Note - Questions in red are mandatory.</p> |
| 3. | <p>Click the Complete button to complete the assessment.</p> |

Extending an Existing Request – Adding Notes

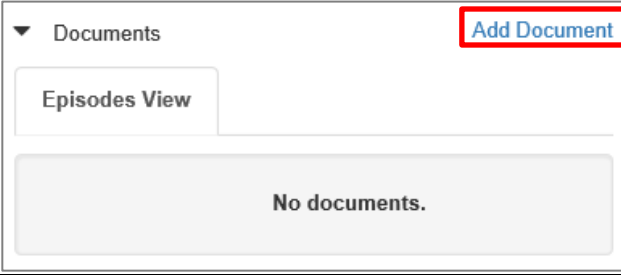
| Step | Action |
|------|--|
| 1. | <p>Within the Note widget on the right side of the episode screen, click on Add Notes</p>  |
| 2. | <p>Enter the appropriate notes for the extension in the notes section. Be sure to include your name and contact information in the event the Plan needs to contact you.</p>  |
| 3. | <p>Click the Save button Your note will now be displayed in the Notes widget.</p>  |



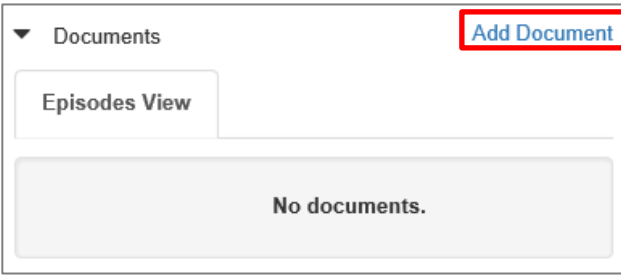
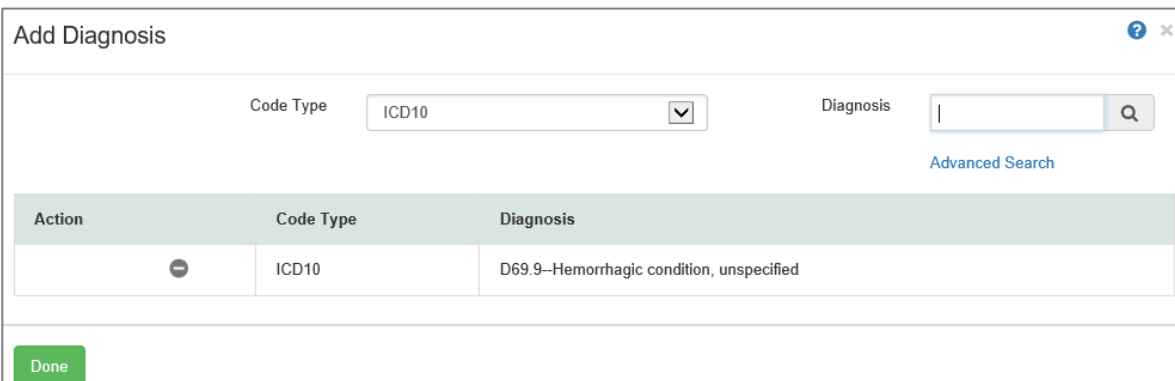
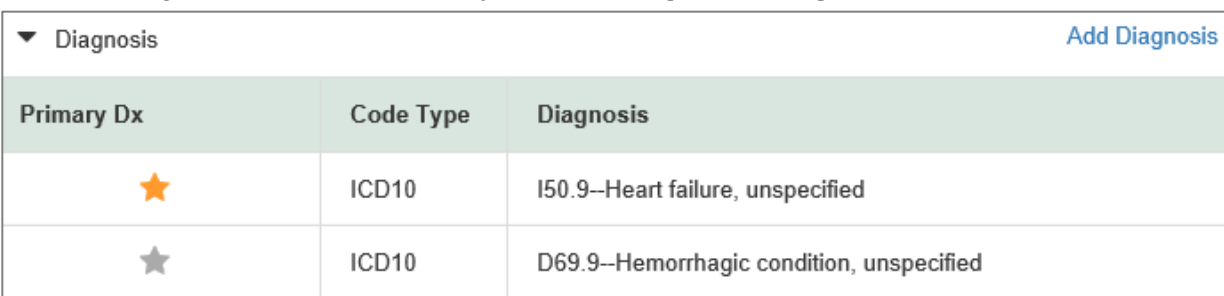
This is a shared note field. Notes can be viewed and entered by both you and the plan.

Extending an Existing Request – Adding Documents

IMPORTANT: Be sure to attach any clinical documentation to support the request for extension

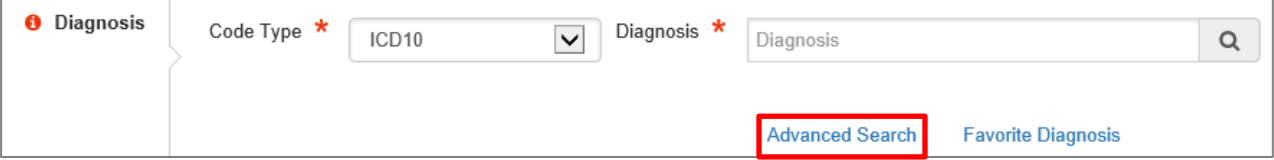
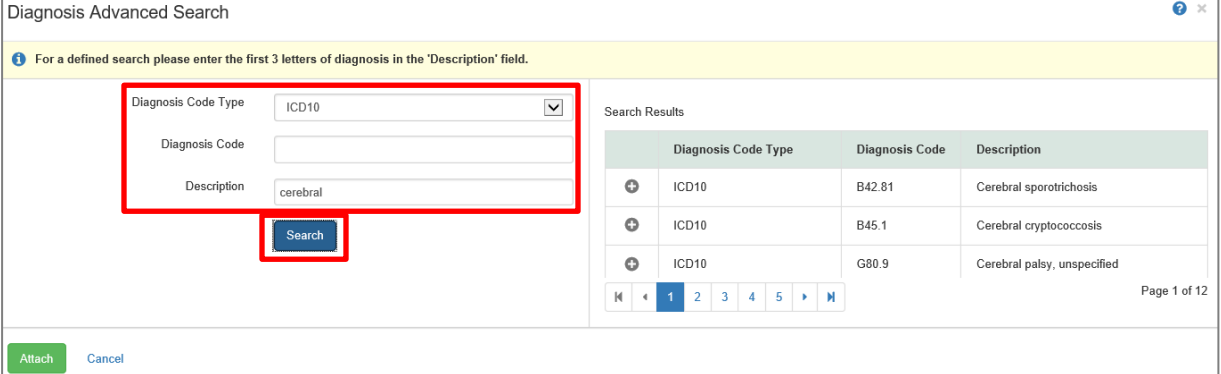
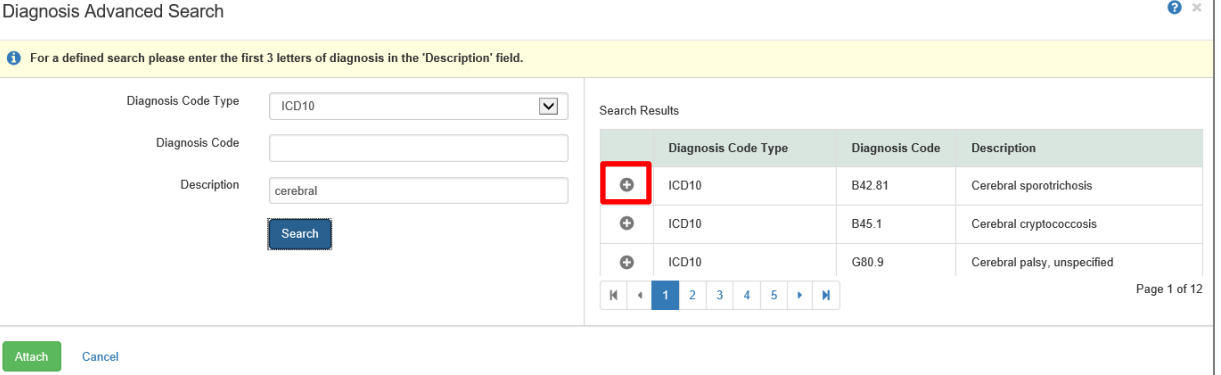
| Step | Action |
|------|---|
| 1. | Within the Documents widget on the right side of the episode screen, click on Add Document  A screenshot of a software interface titled 'Documents'. At the top left, there is a dropdown menu with a downward arrow and the text 'Documents'. To its right is a blue button with the text 'Add Document' in white, which is highlighted with a red rectangular border. Below the dropdown is a tab labeled 'Episodes View'. The main content area of the widget is a light gray box containing the text 'No documents.' in a dark gray font. |
| 2. | Upload any clinical documentation to support the request for extension |

Add Additional Diagnoses to an Existing Request





| Step | Action | | | | | | | | | |
|------------|---|---|-----------|-----------|--|-------|---|--|-------|---|
| 1. | Locate and open the appropriate episode. | | | | | | | | | |
| 2. | <p>Within the Diagnosis widget on the right side of the episode screen, click on Add Diagnosis</p>  <p>The screenshot shows a 'Documents' widget with a dropdown arrow, an 'Add Document' button (highlighted with a red box), an 'Episodes View' tab, and a message that says 'No documents.'</p> | | | | | | | | | |
| 3. | <p>From the Add Diagnosis screen, search for the appropriate diagnosis by either entering the code or using the Advanced Search, and attach to the episode.</p>  <p>The screenshot shows the 'Add Diagnosis' screen with a 'Code Type' dropdown set to 'ICD10' and a search box containing 'D69.9--Hemorrhagic condition, unspecified'. Below the search box is a table with one row: 'D69.9--Hemorrhagic condition, unspecified'. A 'Done' button is at the bottom left.</p> <table border="1" data-bbox="243 924 1412 1029"> <thead> <tr> <th>Action</th> <th>Code Type</th> <th>Diagnosis</th> </tr> </thead> <tbody> <tr> <td></td> <td>ICD10</td> <td>D69.9--Hemorrhagic condition, unspecified</td> </tr> </tbody> </table> | Action | Code Type | Diagnosis | | ICD10 | D69.9--Hemorrhagic condition, unspecified | | | |
| Action | Code Type | Diagnosis | | | | | | | | |
| | ICD10 | D69.9--Hemorrhagic condition, unspecified | | | | | | | | |
| 4. | <p>The new diagnosis will now be displayed in the Diagnosis widget</p>  <p>The screenshot shows a 'Diagnosis' widget with an 'Add Diagnosis' button. Below it is a table with two rows of diagnoses. The first row is marked as 'Primary Dx' with an orange star.</p> <table border="1" data-bbox="243 1239 1461 1470"> <thead> <tr> <th>Primary Dx</th> <th>Code Type</th> <th>Diagnosis</th> </tr> </thead> <tbody> <tr> <td></td> <td>ICD10</td> <td>I50.9--Heart failure, unspecified</td> </tr> <tr> <td></td> <td>ICD10</td> <td>D69.9--Hemorrhagic condition, unspecified</td> </tr> </tbody> </table> | Primary Dx | Code Type | Diagnosis | | ICD10 | I50.9--Heart failure, unspecified | | ICD10 | D69.9--Hemorrhagic condition, unspecified |
| Primary Dx | Code Type | Diagnosis | | | | | | | | |
| | ICD10 | I50.9--Heart failure, unspecified | | | | | | | | |
| | ICD10 | D69.9--Hemorrhagic condition, unspecified | | | | | | | | |

Favorite Diagnosis List – How to Create

The **Favorites Diagnosis** function will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider's account.


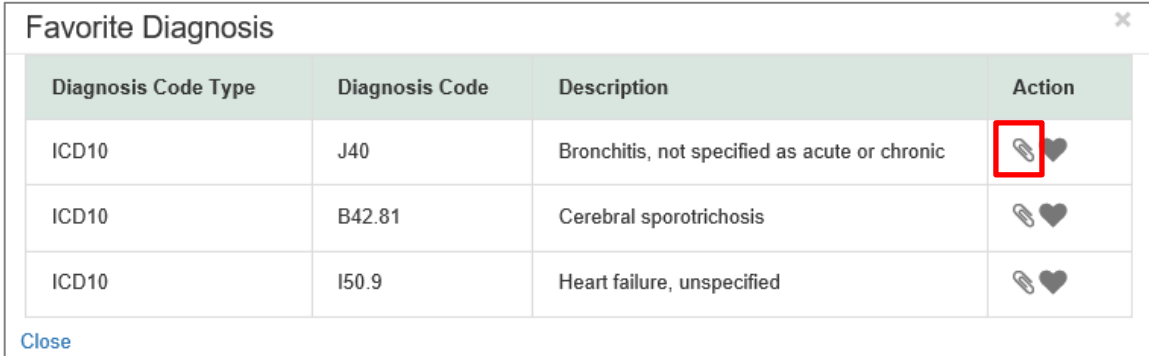
| Step | Action | | | | | | | | | | | | |
|---------------------|--|-----------------------------|----------------|-------------|-------|--------|-------------------------|-------|-------|-------------------------|-------|-------|-----------------------------|
| 1. | <p>When creating an episode, click on the Advanced Search hyperlink to search for a diagnosis</p>  <p>The screenshot shows a form with a 'Diagnosis' section. It includes a 'Code Type' dropdown menu set to 'ICD10' and a 'Diagnosis' text input field. Below these fields are two buttons: 'Advanced Search' (highlighted with a red box) and 'Favorite Diagnosis'.</p> | | | | | | | | | | | | |
| 2. | <p>Type the code or description in the appropriate field and click on Search</p>  <p>The screenshot shows the 'Diagnosis Advanced Search' dialog box. It has a yellow header with a message: 'For a defined search please enter the first 3 letters of diagnosis in the 'Description' field.' Below this are three input fields: 'Diagnosis Code Type' (set to ICD10), 'Diagnosis Code', and 'Description' (containing 'cerebral'). A 'Search' button is highlighted with a red box. To the right is a 'Search Results' table with three rows of results.</p> <table border="1" data-bbox="894 762 1498 951"> <thead> <tr> <th>Diagnosis Code Type</th> <th>Diagnosis Code</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>ICD10</td> <td>B42.81</td> <td>Cerebral sporotrichosis</td> </tr> <tr> <td>ICD10</td> <td>B45.1</td> <td>Cerebral cryptococcosis</td> </tr> <tr> <td>ICD10</td> <td>G80.9</td> <td>Cerebral palsy, unspecified</td> </tr> </tbody> </table> | Diagnosis Code Type | Diagnosis Code | Description | ICD10 | B42.81 | Cerebral sporotrichosis | ICD10 | B45.1 | Cerebral cryptococcosis | ICD10 | G80.9 | Cerebral palsy, unspecified |
| Diagnosis Code Type | Diagnosis Code | Description | | | | | | | | | | | |
| ICD10 | B42.81 | Cerebral sporotrichosis | | | | | | | | | | | |
| ICD10 | B45.1 | Cerebral cryptococcosis | | | | | | | | | | | |
| ICD10 | G80.9 | Cerebral palsy, unspecified | | | | | | | | | | | |
| 3. | <p>Click on the + sign next to the appropriate diagnosis code</p>  <p>The screenshot shows the same 'Diagnosis Advanced Search' dialog box as in step 2. The '+ sign' next to the first search result (ICD10 B42.81 Cerebral sporotrichosis) is highlighted with a red box.</p> <table border="1" data-bbox="894 1245 1498 1434"> <thead> <tr> <th>Diagnosis Code Type</th> <th>Diagnosis Code</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>ICD10</td> <td>B42.81</td> <td>Cerebral sporotrichosis</td> </tr> <tr> <td>ICD10</td> <td>B45.1</td> <td>Cerebral cryptococcosis</td> </tr> <tr> <td>ICD10</td> <td>G80.9</td> <td>Cerebral palsy, unspecified</td> </tr> </tbody> </table> | Diagnosis Code Type | Diagnosis Code | Description | ICD10 | B42.81 | Cerebral sporotrichosis | ICD10 | B45.1 | Cerebral cryptococcosis | ICD10 | G80.9 | Cerebral palsy, unspecified |
| Diagnosis Code Type | Diagnosis Code | Description | | | | | | | | | | | |
| ICD10 | B42.81 | Cerebral sporotrichosis | | | | | | | | | | | |
| ICD10 | B45.1 | Cerebral cryptococcosis | | | | | | | | | | | |
| ICD10 | G80.9 | Cerebral palsy, unspecified | | | | | | | | | | | |

Favorite Diagnosis List – How to Create (cont.)

| Step | Action | | | | | | | | | | | | | | | | |
|--|--|----------------|-------------------------|---|-------------|--------|---|-------|--------|-------------------------|---|-------|---------|--|--|--|--------------------------------|
| 4. | <p>The diagnosis will then appear in the Selected Diagnosis List at the bottom of the Search window.</p> <p><i>Tip: You may need to enlarge the search window or scroll down to see the Selected Diagnosis List section.</i></p> <div data-bbox="245 422 1563 726" style="border: 1px solid black; padding: 5px;"> <p>Selected Diagnosis List </p> <table border="1" data-bbox="253 485 1552 638"> <thead> <tr> <th></th> <th>Diagnosis Code Type</th> <th>Diagnosis Code</th> <th>Description</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">-</td> <td>ICD10</td> <td>B42.81</td> <td>Cerebral sporotrichosis</td> <td style="text-align: center;"></td> </tr> </tbody> </table> <p>Attach Cancel</p> </div> <table border="1" data-bbox="240 772 1544 1024" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #808080; color: white;">If...</th> <th style="background-color: #808080; color: white;">Then...</th> </tr> </thead> <tbody> <tr> <td>You wish to add the diagnosis to your Favorite Diagnosis list</td> <td>Click on the heart icon in the Action column</td> </tr> <tr> <td>You wish to add the diagnosis to the episode</td> <td>Click the Attach button</td> </tr> </tbody> </table> | | Diagnosis Code Type | Diagnosis Code | Description | Action | - | ICD10 | B42.81 | Cerebral sporotrichosis |  | If... | Then... | You wish to add the diagnosis to your Favorite Diagnosis list | Click on the heart icon in the Action column | You wish to add the diagnosis to the episode | Click the Attach button |
| | Diagnosis Code Type | Diagnosis Code | Description | Action | | | | | | | | | | | | | |
| - | ICD10 | B42.81 | Cerebral sporotrichosis |  | | | | | | | | | | | | | |
| If... | Then... | | | | | | | | | | | | | | | | |
| You wish to add the diagnosis to your Favorite Diagnosis list | Click on the heart icon in the Action column | | | | | | | | | | | | | | | | |
| You wish to add the diagnosis to the episode | Click the Attach button | | | | | | | | | | | | | | | | |
| 5. | <p>Repeat steps 1-4 as needed or desired</p> <p>Note: You may add diagnoses to your Favorite Diagnosis list through this method even if you do not need to attach them to this given request.</p> | | | | | | | | | | | | | | | | |

Favorite Diagnosis List – Utilizing the List

Once your **Favorite Diagnosis** list is set up, you do not need to search for these diagnoses in order to add them to the request.

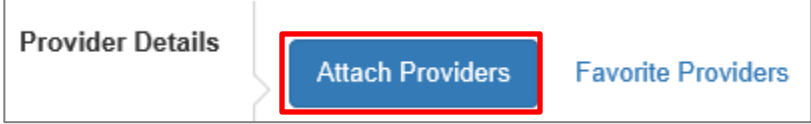
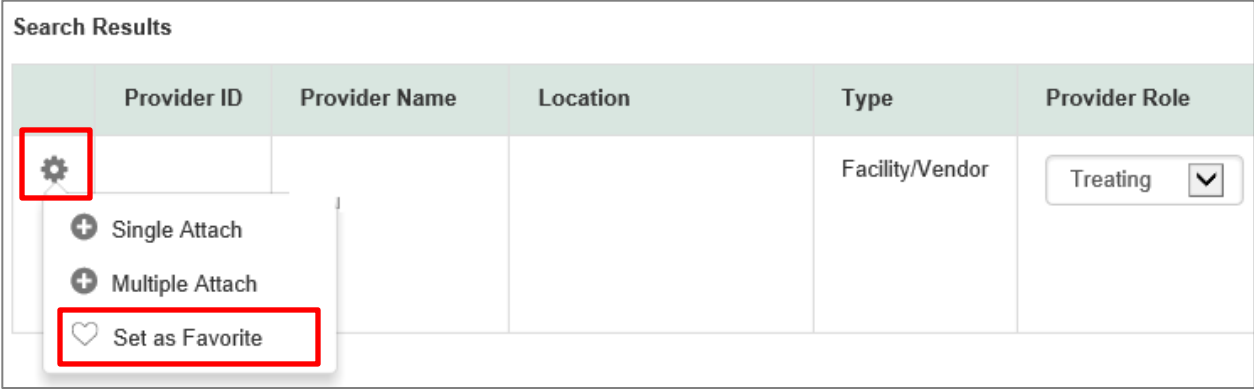



| Step | Action |
|------|--|
| 1. | <p>When creating an episode, click on the Favorite Diagnosis hyperlink</p>  |
| 2. | <p>Click on the Attach Icon (paperclip) to add the diagnosis to the request.</p>  |



Click the heart icon  to remove a diagnosis from your **Favorite Diagnosis** list.


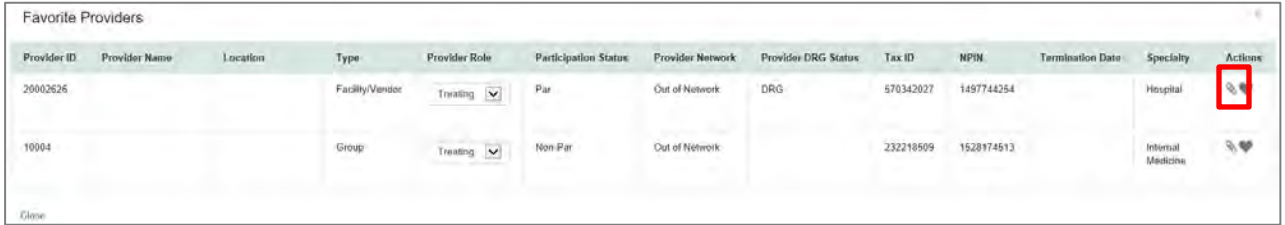
Favorite Providers List – How to Create

The **Favorite Provider** functionality will allow you to create and manage a list of frequently used providers. The list is unique to the provider's account.

| Step | Action | | | | | | | | | | |
|--|---|-------------|-----------------|---|------|---------------|--|--|--|-----------------|---|
| 1. | <p>When creating an episode, click on the Attach Providers button</p>  <p>The screenshot shows a navigation bar with three items: 'Provider Details', 'Attach Providers', and 'Favorite Providers'. The 'Attach Providers' button is highlighted with a red rectangular box.</p> | | | | | | | | | | |
| 2. | <p>Enter the appropriate criteria from the Basic Search screen or from the Advanced Search screen and click on Search</p> | | | | | | | | | | |
| 3. | <p>The Provider will then appear in the Search Results section</p> <p>To add the provider as a favorite:</p> <ol style="list-style-type: none">Click on the gear iconClick on Set as Favorite  <p>The screenshot shows a table titled 'Search Results' with the following columns: Provider ID, Provider Name, Location, Type, and Provider Role. The first row contains a gear icon in the Provider ID column, which is highlighted with a red box. A dropdown menu is open below the gear icon, showing three options: 'Single Attach', 'Multiple Attach', and 'Set as Favorite'. The 'Set as Favorite' option is highlighted with a red rectangular box.</p> <table border="1"><thead><tr><th>Provider ID</th><th>Provider Name</th><th>Location</th><th>Type</th><th>Provider Role</th></tr></thead><tbody><tr><td></td><td></td><td></td><td>Facility/Vendor</td><td>Treating <input type="button" value="v"/></td></tr></tbody></table> | Provider ID | Provider Name | Location | Type | Provider Role |  | | | Facility/Vendor | Treating <input type="button" value="v"/> |
| Provider ID | Provider Name | Location | Type | Provider Role | | | | | | | |
|  | | | Facility/Vendor | Treating <input type="button" value="v"/> | | | | | | | |

Favorite Providers List – Utilizing the List

Once your **Favorites List** is set up, you do not need to search for those providers in order to add them to the request.

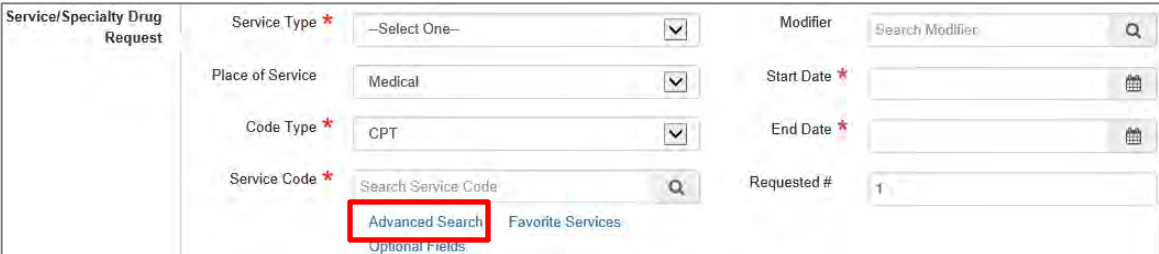
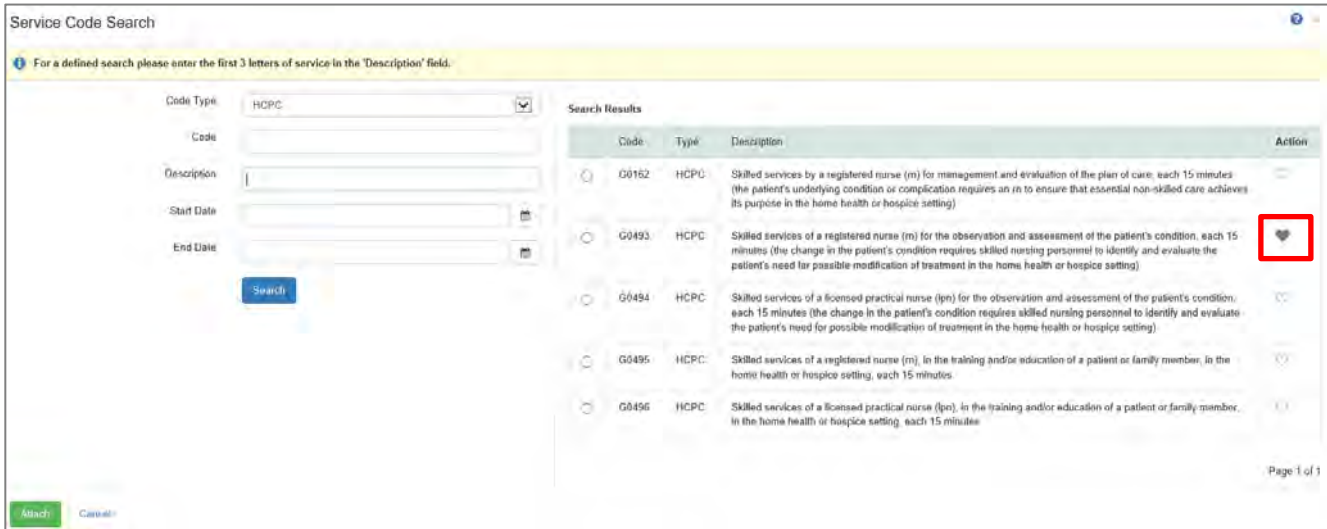
| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------|--|-------------|-----------------|---------------|----------------------|------------------|----------------------|------------------|---------------------|------------------|-------------------|------------------|-----------|---------|----------|--|--|-----------------|----------|-----|----------------|-----|-----------|------------|--|----------|--|-------|--|--|-------|----------|---------|----------------|--|-----------|------------|--|-------------------|--|
| 1. | <p>When creating an episode, click on the Favorite Providers hyperlink</p>  <p>The screenshot shows a 'Provider Details' section with two buttons: 'Attach Providers' (blue) and 'Favorite Providers' (white with a red border).</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. | <p>Click on the Attach Icon (paperclip) to add the provider to the request.</p>  <p>The screenshot shows a table titled 'Favorite Providers' with the following data:</p> <table border="1"> <thead> <tr> <th>Provider ID</th> <th>Provider Name</th> <th>Location</th> <th>Type</th> <th>Provider Role</th> <th>Participation Status</th> <th>Provider Network</th> <th>Provider DRG Status</th> <th>Tax ID</th> <th>NPIN</th> <th>Termination Date</th> <th>Specialty</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>20002626</td> <td></td> <td></td> <td>Facility/Vendor</td> <td>Treating</td> <td>Par</td> <td>Out of Network</td> <td>DRG</td> <td>570342027</td> <td>1497744254</td> <td></td> <td>Hospital</td> <td></td> </tr> <tr> <td>10904</td> <td></td> <td></td> <td>Group</td> <td>Treating</td> <td>Non-Par</td> <td>Out of Network</td> <td></td> <td>232218509</td> <td>1528174513</td> <td></td> <td>Internal Medicine</td> <td></td> </tr> </tbody> </table> | Provider ID | Provider Name | Location | Type | Provider Role | Participation Status | Provider Network | Provider DRG Status | Tax ID | NPIN | Termination Date | Specialty | Actions | 20002626 | | | Facility/Vendor | Treating | Par | Out of Network | DRG | 570342027 | 1497744254 | | Hospital | | 10904 | | | Group | Treating | Non-Par | Out of Network | | 232218509 | 1528174513 | | Internal Medicine | |
| Provider ID | Provider Name | Location | Type | Provider Role | Participation Status | Provider Network | Provider DRG Status | Tax ID | NPIN | Termination Date | Specialty | Actions | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 20002626 | | | Facility/Vendor | Treating | Par | Out of Network | DRG | 570342027 | 1497744254 | | Hospital | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 10904 | | | Group | Treating | Non-Par | Out of Network | | 232218509 | 1528174513 | | Internal Medicine | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |



Click the heart icon  to remove a Provider from your **Favorite Providers** list.

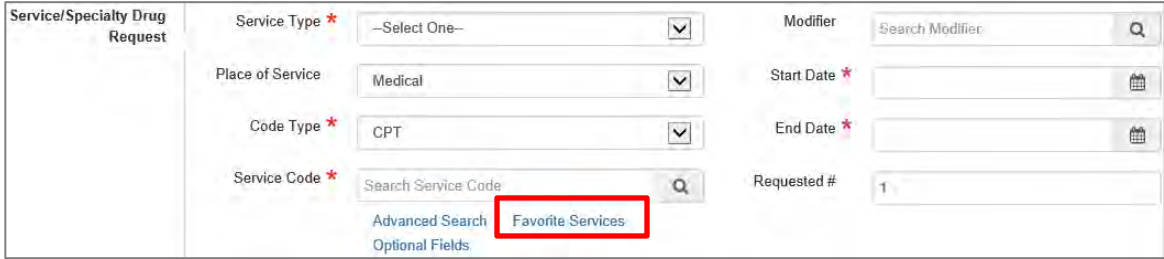
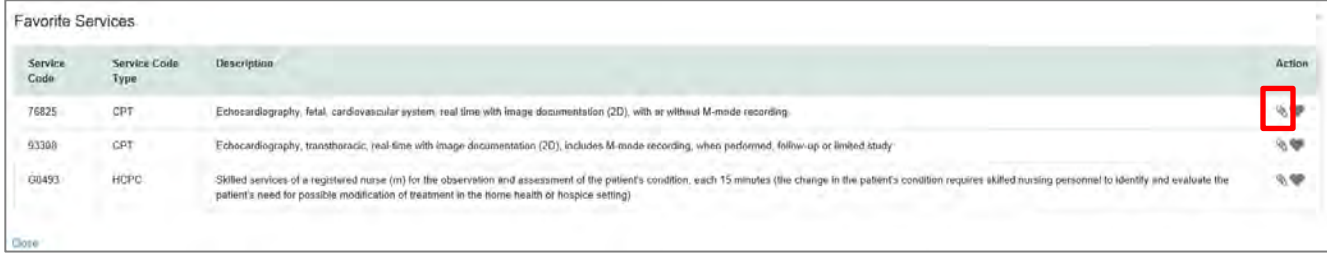
Favorite Services List – How to Create

The **Favorite Services** functionality will allow you to create and manage a list of frequently used services. The list is unique to the provider's account.


| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | |
|-------|---|---|--------|-------------|--------|-------|------|---|--|-------|------|--|--|-------|------|---|--|-------|------|---|--|-------|------|--|--|
| 1. | <p>When creating an episode, click on the Advanced Search hyperlink</p>  | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. | <p>Enter the appropriate criteria from the Basic Search screen or from the Advanced Search screen and click on Search</p> | | | | | | | | | | | | | | | | | | | | | | | | |
| 3. | <p>The service(s) will then appear in the Search Results section Click on the heart icon to add the service as a favorite.</p>  <table border="1" data-bbox="803 961 1555 1276"> <thead> <tr> <th>Code</th> <th>Type</th> <th>Description</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>G0162</td> <td>HCPC</td> <td>Skilled services by a registered nurse (rn) for management and evaluation of the plan of care, each 15 minutes (the patient's underlying condition or complication requires an rn to ensure that essential non-skilled care achieves its purpose in the home health or hospice setting)</td> <td></td> </tr> <tr> <td>G0493</td> <td>HCPC</td> <td>Skilled services of a registered nurse (rn) for the observation and assessment of the patient's condition, each 15 minutes (the change in the patient's condition requires skilled nursing personnel to identify and evaluate the patient's need for possible modification of treatment in the home health or hospice setting)</td> <td></td> </tr> <tr> <td>G0494</td> <td>HCPC</td> <td>Skilled services of a licensed practical nurse (lpn) for the observation and assessment of the patient's condition, each 15 minutes (the change in the patient's condition requires skilled nursing personnel to identify and evaluate the patient's need for possible modification of treatment in the home health or hospice setting)</td> <td></td> </tr> <tr> <td>G0495</td> <td>HCPC</td> <td>Skilled services of a registered nurse (rn), in the training and/or education of a patient or family member, in the home health or hospice setting, each 15 minutes</td> <td></td> </tr> <tr> <td>G0496</td> <td>HCPC</td> <td>Skilled services of a licensed practical nurse (lpn), in the training and/or education of a patient or family member, in the home health or hospice setting, each 15 minutes</td> <td></td> </tr> </tbody> </table> | Code | Type | Description | Action | G0162 | HCPC | Skilled services by a registered nurse (rn) for management and evaluation of the plan of care, each 15 minutes (the patient's underlying condition or complication requires an rn to ensure that essential non-skilled care achieves its purpose in the home health or hospice setting) | | G0493 | HCPC | Skilled services of a registered nurse (rn) for the observation and assessment of the patient's condition, each 15 minutes (the change in the patient's condition requires skilled nursing personnel to identify and evaluate the patient's need for possible modification of treatment in the home health or hospice setting) | | G0494 | HCPC | Skilled services of a licensed practical nurse (lpn) for the observation and assessment of the patient's condition, each 15 minutes (the change in the patient's condition requires skilled nursing personnel to identify and evaluate the patient's need for possible modification of treatment in the home health or hospice setting) | | G0495 | HCPC | Skilled services of a registered nurse (rn), in the training and/or education of a patient or family member, in the home health or hospice setting, each 15 minutes | | G0496 | HCPC | Skilled services of a licensed practical nurse (lpn), in the training and/or education of a patient or family member, in the home health or hospice setting, each 15 minutes | |
| Code | Type | Description | Action | | | | | | | | | | | | | | | | | | | | | | |
| G0162 | HCPC | Skilled services by a registered nurse (rn) for management and evaluation of the plan of care, each 15 minutes (the patient's underlying condition or complication requires an rn to ensure that essential non-skilled care achieves its purpose in the home health or hospice setting) | | | | | | | | | | | | | | | | | | | | | | | |
| G0493 | HCPC | Skilled services of a registered nurse (rn) for the observation and assessment of the patient's condition, each 15 minutes (the change in the patient's condition requires skilled nursing personnel to identify and evaluate the patient's need for possible modification of treatment in the home health or hospice setting) | | | | | | | | | | | | | | | | | | | | | | | |
| G0494 | HCPC | Skilled services of a licensed practical nurse (lpn) for the observation and assessment of the patient's condition, each 15 minutes (the change in the patient's condition requires skilled nursing personnel to identify and evaluate the patient's need for possible modification of treatment in the home health or hospice setting) | | | | | | | | | | | | | | | | | | | | | | | |
| G0495 | HCPC | Skilled services of a registered nurse (rn), in the training and/or education of a patient or family member, in the home health or hospice setting, each 15 minutes | | | | | | | | | | | | | | | | | | | | | | | |
| G0496 | HCPC | Skilled services of a licensed practical nurse (lpn), in the training and/or education of a patient or family member, in the home health or hospice setting, each 15 minutes | | | | | | | | | | | | | | | | | | | | | | | |

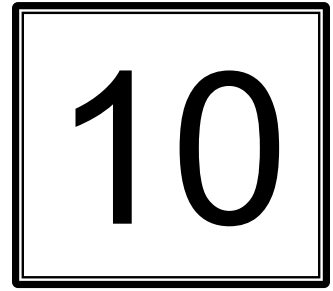
Favorite Services List – Utilizing the List

Once your **Favorites List** is set up, you do not need to search for those services in order to add them to the request.

| Step | Action |
|------|--|
| 1. | <p>When creating an episode, click on the Favorite Services hyperlink</p>  <p>The screenshot shows a form titled "Service/Specialty Drug Request". It contains several fields: "Service Type" (dropdown menu with "--Select One--"), "Place of Service" (dropdown menu with "Medical"), "Code Type" (dropdown menu with "CPT"), and "Service Code" (text input with a search icon). Below the "Service Code" field are links for "Advanced Search" and "Favorite Services" (highlighted with a red box). To the right, there are fields for "Modifier" (with a search icon), "Start Date", "End Date", and "Requested #" (with the value "1").</p> |
| 2. | <p>Click on the Attach Icon (paperclip) to add the service code to the request.</p>  <p>The screenshot shows a table titled "Favorite Services". The table has columns for "Service Code", "Service Code Type", "Description", and "Action". There are three rows of data. The first row has "76825" as the Service Code, "CPT" as the Service Code Type, and "Echocardiography, fetal, cardiovascular system, real time with image documentation (2D), with or without M-mode recording." as the Description. The "Action" column for this row contains an "Attach" icon (a paperclip) which is highlighted with a red box, and a heart icon. The second row has "93308" as the Service Code, "CPT" as the Service Code Type, and "Echocardiography, transthoracic, real-time with image documentation (2D), includes M-mode recording, when performed, follow-up or limited study" as the Description. The "Action" column for this row contains an "Attach" icon and a heart icon. The third row has "00493" as the Service Code, "HCPC" as the Service Code Type, and "Skilled services of a registered nurse (r) for the observation and assessment of the patient's condition, each 15 minutes (the change in the patient's condition requires skilled nursing personnel to identify and evaluate the patient's need for possible modification of treatment in the home health or hospice setting)" as the Description. The "Action" column for this row contains an "Attach" icon and a heart icon. A "Close" button is visible at the bottom left of the table.</p> |



Click the heart icon  to remove a service from your **Favorite Services** list.



10 RESOURCES

Plan Contact Information

| LOB | UM Phone Number | UM Fax Number |
|--|-----------------|---------------|
| AmeriHealth Caritas Delaware | 855-396-5770 | 866-423-0946 |
| AmeriHealth Caritas District of Columbia | 800-408-7510 | 877-759-6216 |
| AmeriHealth Caritas Louisiana | 888-913-0350 | 866-397-4522 |
| AmeriHealth Caritas New Hampshire | 833-472-2264 | 833-469-2264 |
| AmeriHealth Caritas North Carolina | 833-900-2262 | 833-893-2262 |
| AmeriHealth Caritas Northeast | 888-498-0504 | 888-743-5551 |
| AmeriHealth Caritas Pennsylvania | 800-521-6622 | 866-755-9949 |
| Blue Cross Complete of Michigan | 888-312-5713 | 888-989-0019 |
| Keystone First | 800-521-6622 | 215-937-5322 |
| Prestige Health Choice | 855-371-8074 | 855-236-9285 |
| Select Health of South Carolina | 888-559-1010 | 888-824-7788 |

Escalation Process and Training Requests – Account Executives and Providers

| If... | Then email... |
|---------------------------------------|---|
| Access Issues and/or Technical Issues | DL-ACFC: Jiva and Client Letter Support (ACFC_JivaCLSupport@amerihealthcaritas.com) |
| Account Executive Training Requests | Corporate Provider Network Management Training (CPNMT@amerihealthcaritas.com) |
| Provider Training Requests | DL-ACFC: Clinical Training (ClinicalTraining@amerihealthcaritas.com) |