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Solutions for the Underserved
and Chronically Ill.

Jiva Provider Portal Participant Guide

Corporate Clinical Systems Training Department

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1 LOGGING IN TO THE JIVA PROVIDER PORTAL

Logging in to Jiva Provider Portal

[AllPayer Access: New Year—are you ready?](#)
[Re-Save Bookmarks](#)
[Discontinued Support of Windows Vista](#)

Sign In

Username:

Password:

Sign In

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

Getting Started with NaviNet

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

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?

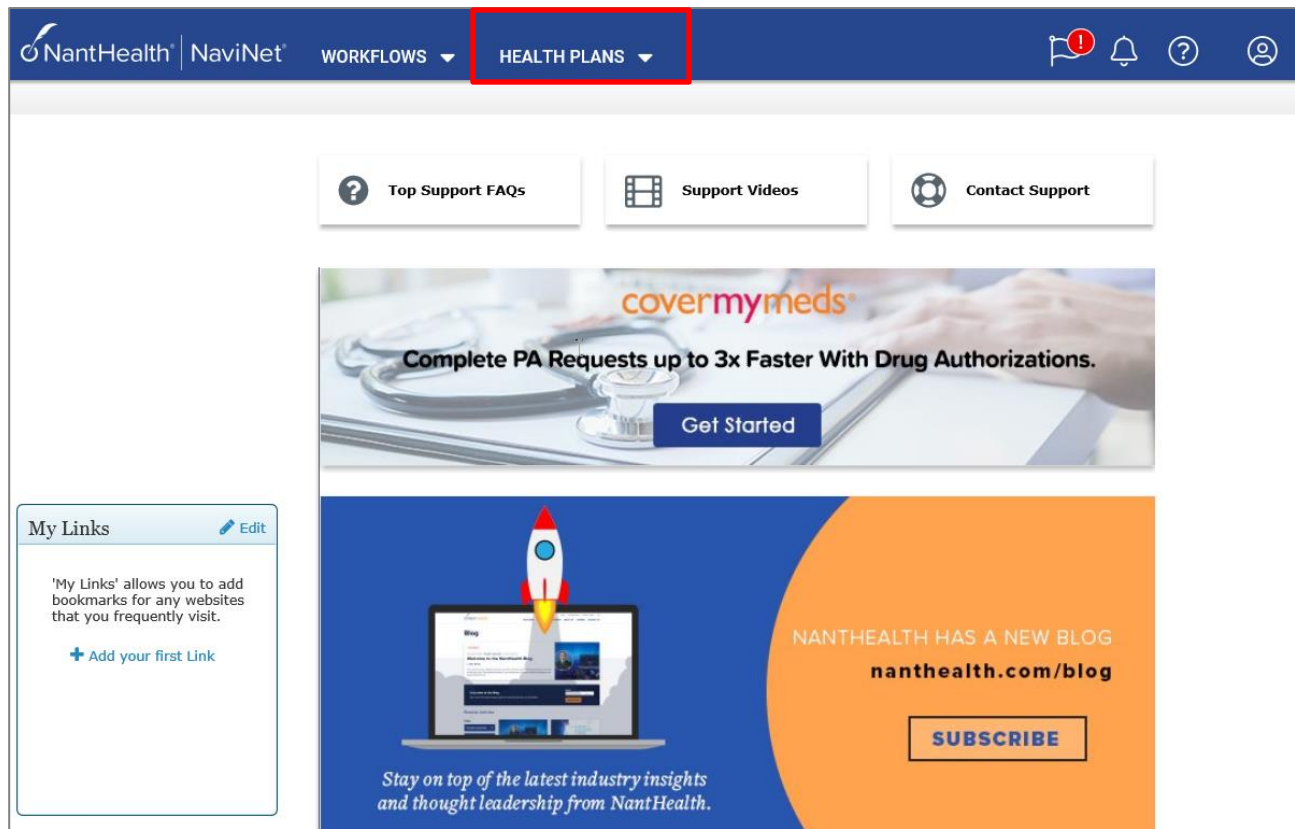
HIPAA guidelines prohibit users from sharing login information. If you are sharing login credentials, please contact your NaviNet Security Officer to be added as a user. Don't know the name of your Security Officer? Log in and go to **My Account** and click **My Security**. There is no additional charge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

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[Terms of Use](#)

| 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 Jiva 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: The Health Plan-specific Home page will display | |

Logging in to Jiva 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.

NantHealth | NaviNet WORKFLOWS HEALTH PLANS

PerformCare

Workflows for this Plan

- Eligibility and Benefits Inquiry
- Claim Status Inquiry
- Behavioral Health Authorization Management
- Behavioral Health Authorizations Log
- Report Inquiry
- Claim Submission
- Provider Directory
- Jiva Children's Svcs Authorization Management**
- Forms & Dashboards

FAQs

- How do I change my password?
- I cannot remember my password.
- How do I set up additional Health Plans?
- What are the roles and responsibilities of a Security Officer?
- How do I enable or disable permissions for users in my office?

More

Browser requirement: You must use Internet Explorer 10 or 11, or Firefox 26 to use the Jiva 5.6 Provider Portal.

PerformCARE®

Welcome PerformCare Providers to you to provide the best care possit

between our secure, easy-to-use provider portal and the PerformCare website. These two tools will enable

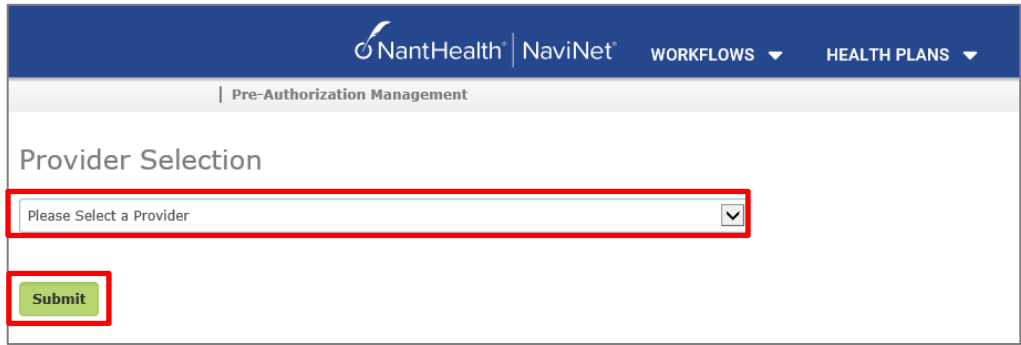
Training Videos

Claims Investigation

NantHealth NaviNet

Claims Investigation

To access the Jiva Provider Portal:

| Step | Action |
|------|---|
| 1. | <p>Click on the Jiva Children's Svcs 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 Jiva Provider Portal opening. The Provider Selection page may display. If it does, you would select your Provider form the drop-down menu and click on the Submit button. The Jiva Provider Portal will then open.</p>  |

Overview of the Dashboard

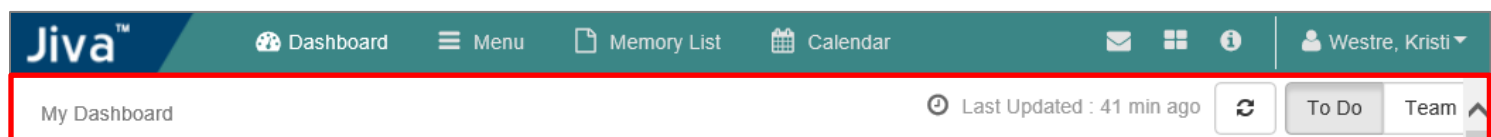
The dashboard consists of widgets (*or panels*) that help you to access the tasks that are assigned to you. It also provides high-level information about the episodes and activities assigned to you.

Application Banner



| Menu Bar | Description |
|-------------|--|
| Dashboard | Click to return to the Dashboard from anywhere within the Jiva 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.

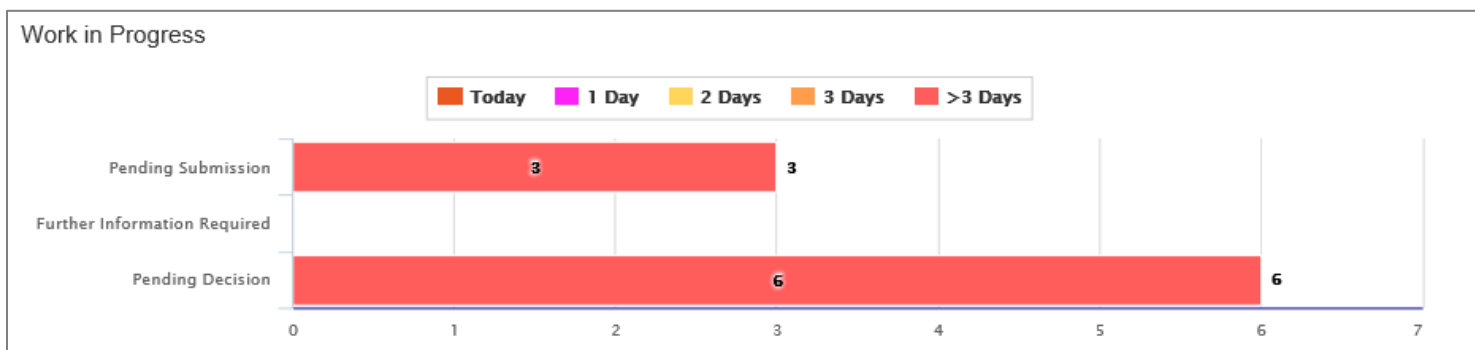
Information Widget

| | |
|---|-------------------|
|  | 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 | <div>Displays the number of episodes that have been submitted. Click the hyperlink to view the list of requests.</div> <div><div>My Requests</div><div><div>All</div><div>All</div><div>Filter by Date 07/12/2020 - 09/10/2020</div></div><table><tr><th>Actions</th><th>Episode Type</th><th>Cert Number</th><th>Episode ID</th><th>Member Name</th><th>Requested/Created Date</th><th>Diagnosis</th><th>Procedure</th><th>Provider</th><th>Created By</th><th>Submitted By</th><th>Status</th><th>No. Approved Units</th><th>No. Denied Units</th></tr><tr><td></td><td>IP</td><td>2008000389</td><td>9025566</td><td>ExampleA, Portal</td><td>08/12/2020</td><td>I50.9</td><td>93352</td><td></td><td>Westre, Kristi</td><td>Westre, Kristi</td><td>Pending Decision</td><td>0</td><td>0</td></tr><tr><td></td><td>IP</td><td>2008000391</td><td>9025568</td><td>ExampleB, Portal</td><td>08/12/2020</td><td>I50.9</td><td>33460</td><td></td><td>Westre, Kristi</td><td>Westre, Kristi</td><td>Pending Decision</td><td>0</td><td>0</td></tr></table></div> <div>Note: It does not include episodes that are pending submission.</div> | Actions | Episode Type | Cert Number | Episode ID | Member Name | Requested/Created Date | Diagnosis | Procedure | Provider | Created By | Submitted By | Status | No. Approved Units | No. Denied Units | | IP | 2008000389 | 9025566 | ExampleA, Portal | 08/12/2020 | I50.9 | 93352 | | Westre, Kristi | Westre, Kristi | Pending Decision | 0 | 0 | | IP | 2008000391 | 9025568 | ExampleB, Portal | 08/12/2020 | I50.9 | 33460 | | Westre, Kristi | Westre, Kristi | Pending Decision | 0 | 0 |
| Actions | Episode Type | Cert Number | Episode ID | Member Name | Requested/Created Date | Diagnosis | Procedure | Provider | Created By | Submitted By | Status | No. Approved Units | No. Denied Units | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | IP | 2008000389 | 9025566 | ExampleA, Portal | 08/12/2020 | I50.9 | 93352 | | Westre, Kristi | Westre, Kristi | Pending Decision | 0 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | IP | 2008000391 | 9025568 | ExampleB, Portal | 08/12/2020 | I50.9 | 33460 | | Westre, Kristi | Westre, Kristi | Pending Decision | 0 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Gaps in Care | Displays any Gaps in Care for the members associated with you. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Work in Progress Widget

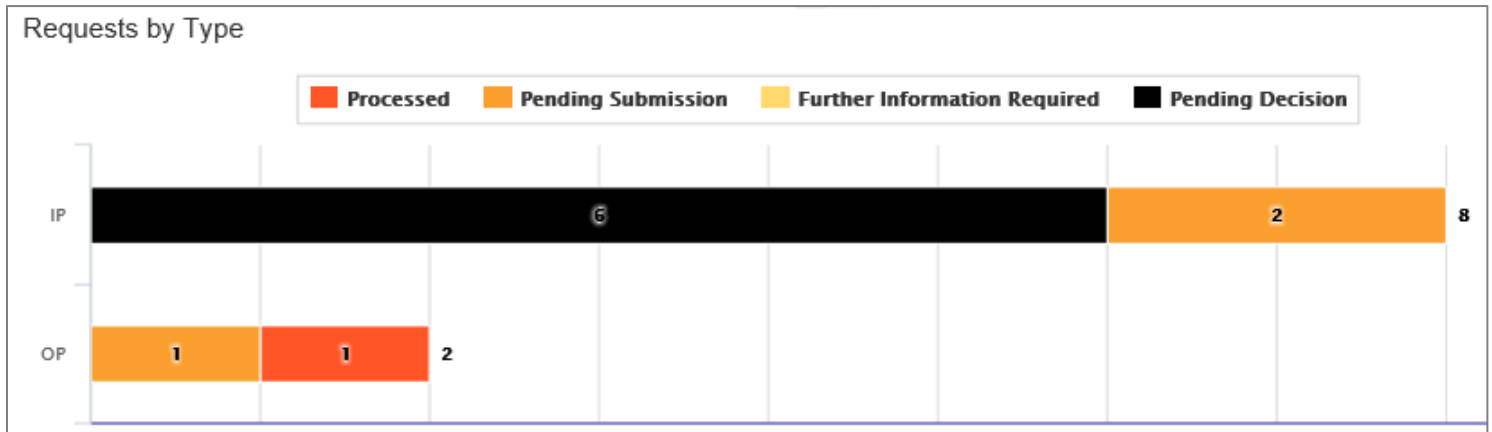
You can view the request statistics by status in the Work in Progress widget. It displays the number of requests created and their statuses in a graphical representation. It also displays the number of days that a request is in the same status (color coded). Clicking on a bar in the graph will display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



Overview of the Dashboard: To-Do View, continued

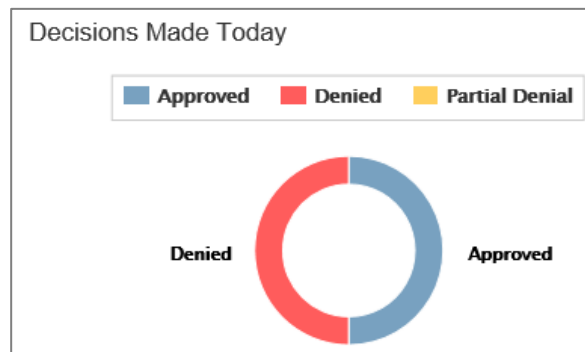
Requests by Type Widget

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.

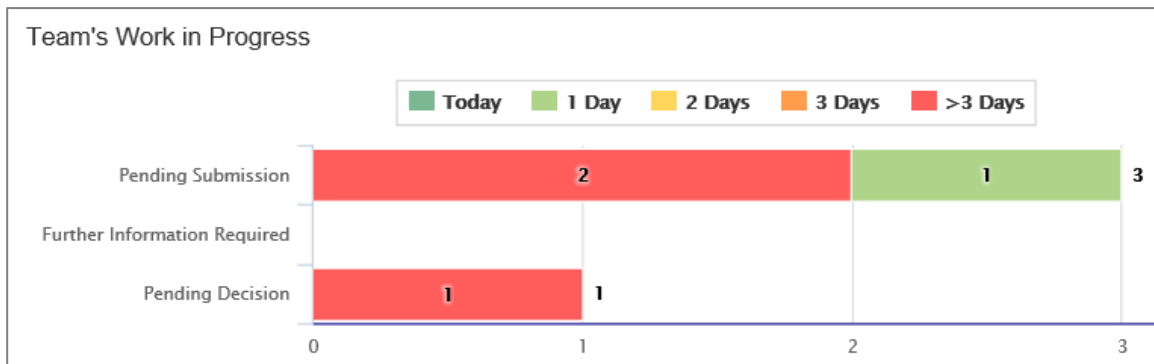
Team Members Widget

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.



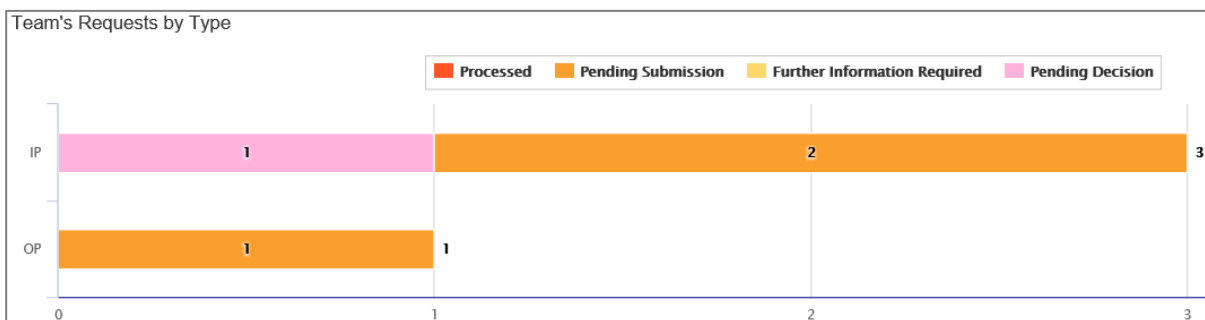
Team's Work in Progress Widget

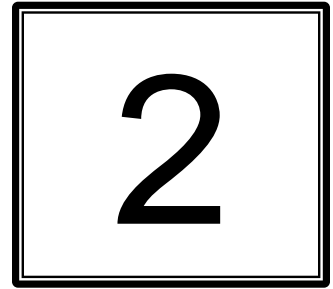
The Team's Work in Progress widget displays the number of episodes created by your team and is displayed based on the timeline.



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

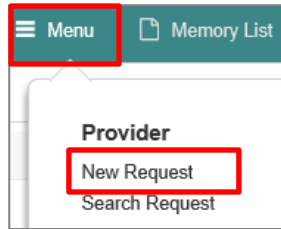
It is recommended that you search for a possible duplication before entering a request. Conducting the search using **Search Request** allows you to view existing requests for a member.

| | |
|---|---|
|  | <p style="text-align: center;">Duplicate Case Check and Alert</p> <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> <div><div><div>Menu</div><div>Memory List</div></div><div><div>Provider</div><div>New Request</div><div>Search Request</div></div></div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. | <p>Search by one of the following:</p> <table><tr><th>Search Information</th><th>Description</th></tr><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></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><tr><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><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></table> <div><div>Add New Request</div><div></div></div> | 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 |

New Request

Member Last Name

Client


Member First Name

Member ID Type

ELIG Member ID

Member DOB

Member ID *

| Step | Action |
|------|---|
| 1. | Enter the Member ID in the Member ID field. <div>  <div>When searching by Member ID you must enter “-01” at the end of the Member ID.</div> </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. |

New Request

Member Last Name

Client


Member First Name

Member ID Type

ELIG Member ID

Member DOB

Member ID *

| | 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 | | <div>Add Request</div> <input type="button" value="v"/> |



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.

Jiva™ Dashboard Menu Memory List Calendar

ExampleA, Portal (Female) DOB: 04/19/1966 (54y) Member ID: Government ID:

Address 1234 Mulberry L... IA Phone & Email (515) 555-5555 Coverage Group PCP/PCM Allergies

Inpatient Request

Episode Details

Request Type * --Select One--

Request Priority * --Select One--

Admit Type --Select One--

Optional Fields

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.

Inpatient Request

Episode Details

Request Type * --Select One--

Request Priority * --Select One--

Admit Type --Select One--

Time Request

Reason for Request --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 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.*"

Diagnosis
















Code Type *

ICD10

Diagnosis *

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. <div><table><tr><th>Primary Dx</th><th>Code Type</th><th>Diagnosis</th><th>Actions</th></tr><tr><td></td><td>ICD10</td><td>I50.9—Heart failure, unspecified</td><td></td></tr><tr><td></td><td>ICD10</td><td>R69—Illness, unspecified</td><td></td></tr></table></div> | 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><tr><th>If you...</th><th>Then...</th></tr><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></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. | | | | | | | | | | | | |

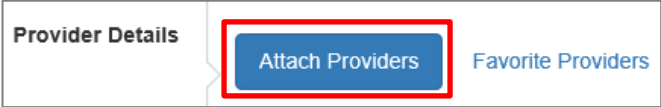
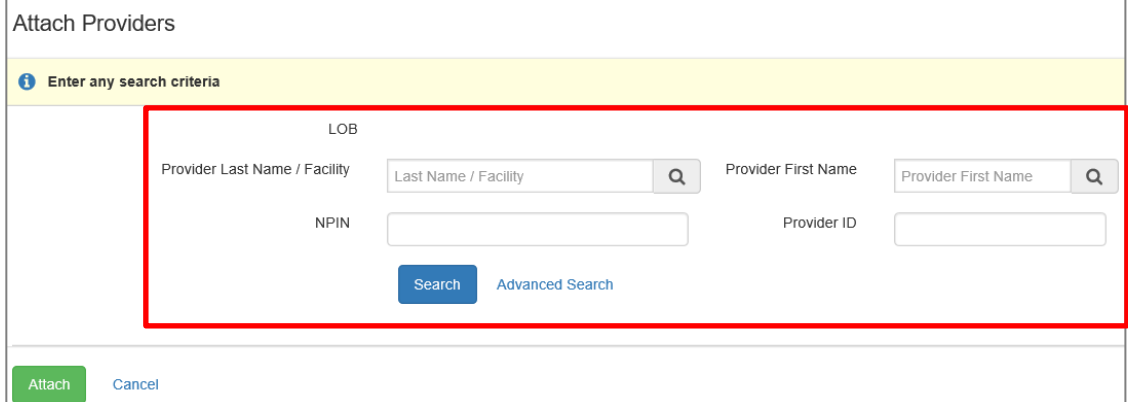
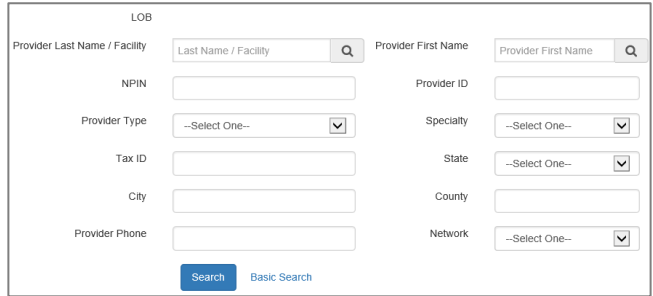
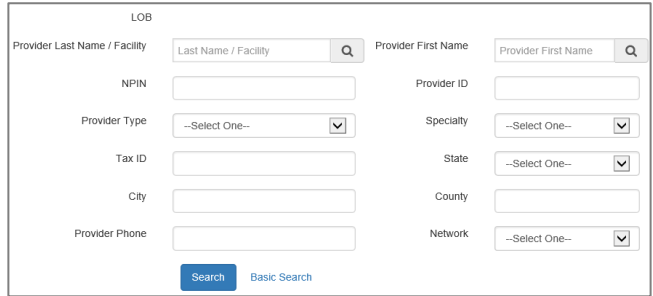
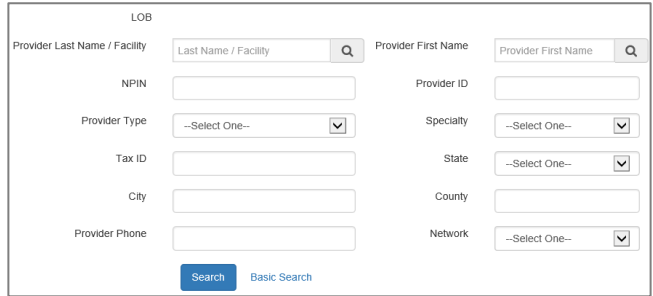
Adding a New IP Clinical Request – Adding Providers

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 Provider 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"> <thead> <tr> <th>If appropriate provider...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Is displayed</td><td>Proceed to Step 4.</td></tr> <tr> <td>Is not displayed</td><td> <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 | Proceed to Step 4. | Is not 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 | Proceed to Step 4. | | | | | | |
| Is not displayed | <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p>  | | | | | | |

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 ▼ | |
| <div>  Single Attach  Multiple Attach  Set as Favorite </div> | | | | | | |

| 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 “Attending” 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... |
|--|---|
| Attach <u>multiple providers</u> to an episode at the same time | <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 |
|------------------|----|------------|----------|-------------|---------|-------|---|
| | | 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="404 548 1380 961"> </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 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><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><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></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

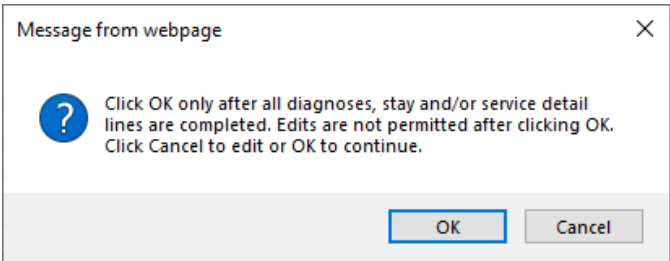
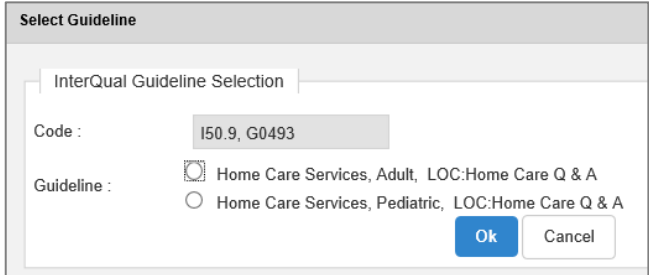
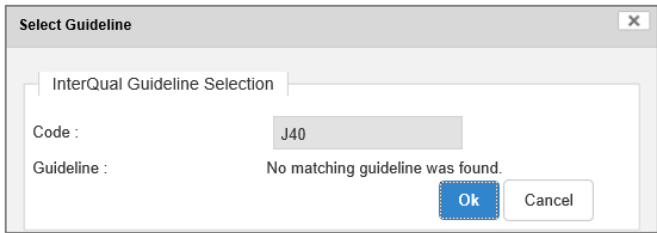
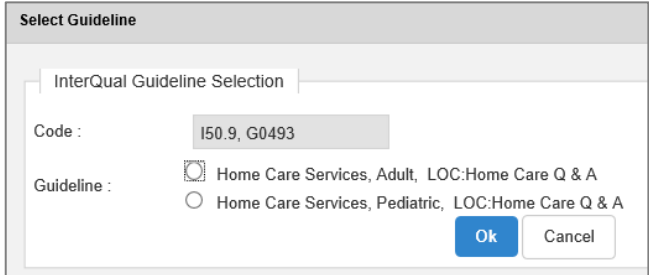
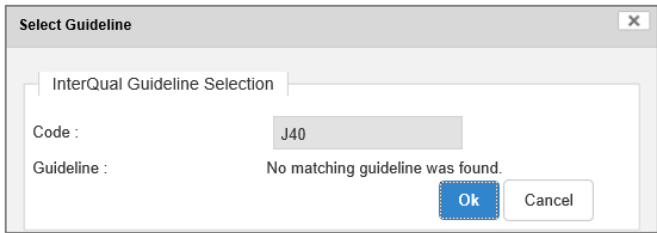
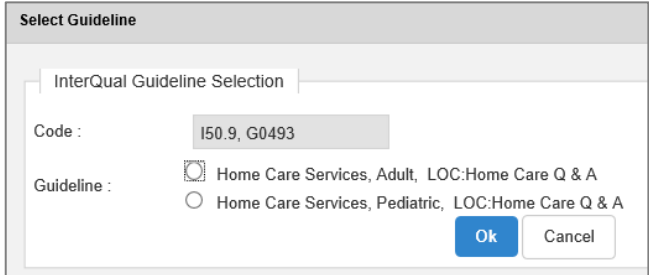
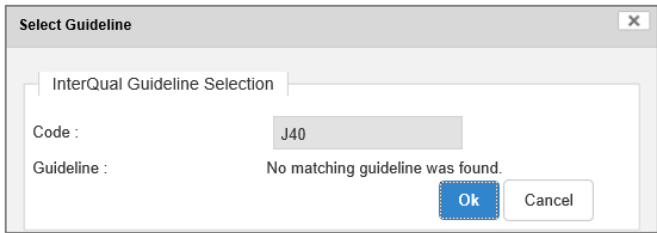


If you need training or have questions regarding the use of InterQual Connect criteria, please contact your facility InterQual trainer or contact your Change HealthCare account representative.

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

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|--------------|------------|----------------------------|---|--|--|---------------|--|--------------|------------|------------|----------|--------------|------------------|---------------|--|-------------------------------------|------------|---|------------|------------|-----------|---------|--|
| 1. | Click the Check for Review button. <div><div>Check For Review</div></div> | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. | Once determined that one or both exists, you will receive the following pop-up message. Click OK . <div><div>Message from webpage</div><div><div>?</div><div>There are stay/service lines to be reviewed. Kindly complete the same before submit.</div></div><div><div>OK</div><div>Cancel</div></div></div> | | | | | | | | | | | | | | | | | | | | | | | | |
| 3. | Click the appropriate Review button. <table><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> <div><div>Stay Request</div><div><div>Service Type *<div>Inpatient</div></div><div>Actual Admit Date<div>08/12/2020</div></div><div>Place of Service<div>Medical</div></div><div>Requested Level Of Care<div>--Select One--</div></div><div>LOS Requested<div>1</div></div><div>Review Status<div></div></div><div><div>Review</div></div></div><div><div>Review</div><div>Service Request</div><table><thead><tr><th>Action</th><th></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></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 | | 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 | | 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 | | | | | | | | | | | | | | | | | | |

Adding a New IP Clinical Request – InterQual, cont.

| Step | Action | | | | | | |
|------------------------------|--|----------------|---------|---------------------------|---|------------------------------|---|
| 4. | <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> | | | | | | |
| 5. | <table border="1"> <thead> <tr> <th>If there is...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Matching Guideline</td><td> <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>  </td></tr> <tr> <td>No Matching Guideline</td><td> <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>  </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>  | 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>  |
| 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>  | | | | | | |
| 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>  | | | | | | |

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. | <div>From the Recommendations page:</div> <table><tr><th>If you click...</th><th>Then...</th></tr><tr><td>Save</td><td>The review will be saved and can be updated, if needed, prior to submitting the request.</td></tr><tr><td>Complete</td><td>The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td></tr></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 Jiva 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.

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

Assessment Score: 0 of 9

Provider Portal Delivery Screening Assesmer

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 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><div>Documents</div><div><div>Document Title *</div><div>Clinical Information</div><div>Document Description</div><div>Can enter a document description here.</div><div>Document Type</div><div>Medical Document</div><div>Select Document</div><div>Browse</div><div>PP Example Document.docx</div></div></div> |

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. |



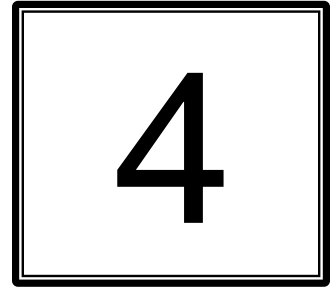
This is a shared note field. Notes can be viewed and entered by both you and the plan.

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> <div> Submit Save as Draft Delete Cancel </div> <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 |
| | 12548538 | 27428(CPT) | 1 | 0 | 0 | | | Inpatient | Per Day |
| | | | | | | | | | Decision |
| | | | | | | | | | 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.

Jiva™ Dashboard Menu Memory List Calendar

ExampleA, Portal (Female) DOB: 04/19/1966 (54y) Member ID: Government ID:

Address 1234 Mulberry L... IA Phone & Email (515) 555-5555 Coverage Group PCP/PCM Allergies

Inpatient Request

Episode Details

Request Type * --Select One--

Request Priority * --Select One--

Admit Type --Select One--

[Optional Fields](#)

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.

Inpatient Request

Episode Details

Request Type * --Select One--

Request Priority * --Select One--

Admit Type --Select One--

Time Request

Reason for Request --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 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.*"

Diagnosis
















Code Type *

ICD10

Diagnosis *

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. <div><table><tr><th>Primary Dx</th><th>Code Type</th><th>Diagnosis</th><th>Actions</th></tr><tr><td></td><td>ICD10</td><td>I50.9—Heart failure, unspecified</td><td></td></tr><tr><td></td><td>ICD10</td><td>R69—Illness, unspecified</td><td></td></tr></table></div> | 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><tr><th>If you...</th><th>Then...</th></tr><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></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. | | | | | | | | | | | | |

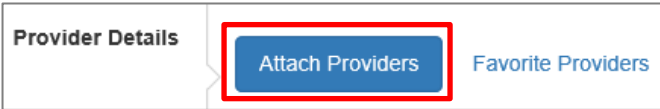
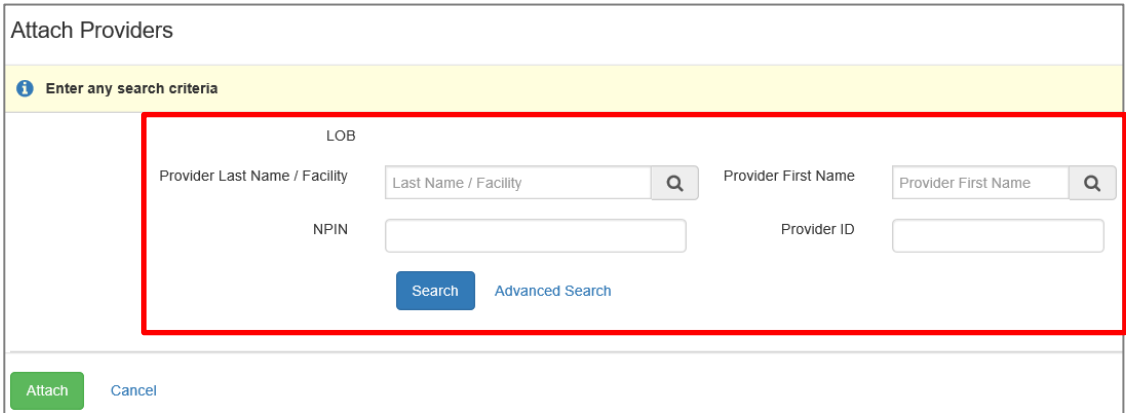
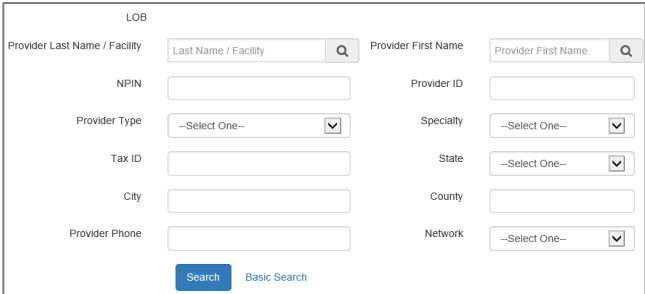
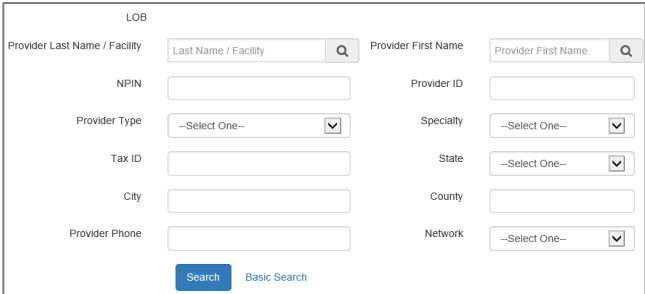
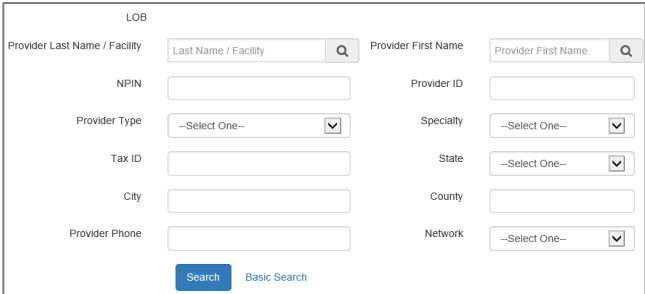
Adding a New IP Non-Clinical Request – Adding Providers

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"> <thead> <tr> <th>If appropriate provider...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Is displayed</td><td>Click the Attach button</td></tr> <tr> <td><i>Is not displayed</i></td><td> <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 displayed</i> | <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 displayed</i> | <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  | |
| <div>  Single Attach  Multiple Attach  Set as Favorite </div> | | | | | | |

| 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 “Attending” 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... |
|--|---|
| <u>Attach multiple providers to an episode at the same time</u> | <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 |
|------------------|----|------------|----------|---|---------|-------|---|
| | | 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 | | | |
| | 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="404 569 1380 984" data-label="Form"> </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><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><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></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><div>Documents</div><div><div>Document Title *</div><div>Clinical Information</div><div>Document Description</div><div>Can enter a document description here.</div><div>Document Type</div><div>Medical Document</div><div>Select Document</div><div>Browse</div><div>PP Example Document.docx</div></div></div> |

Adding a New 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 ✓

📎

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⬇

⬆

| 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. |

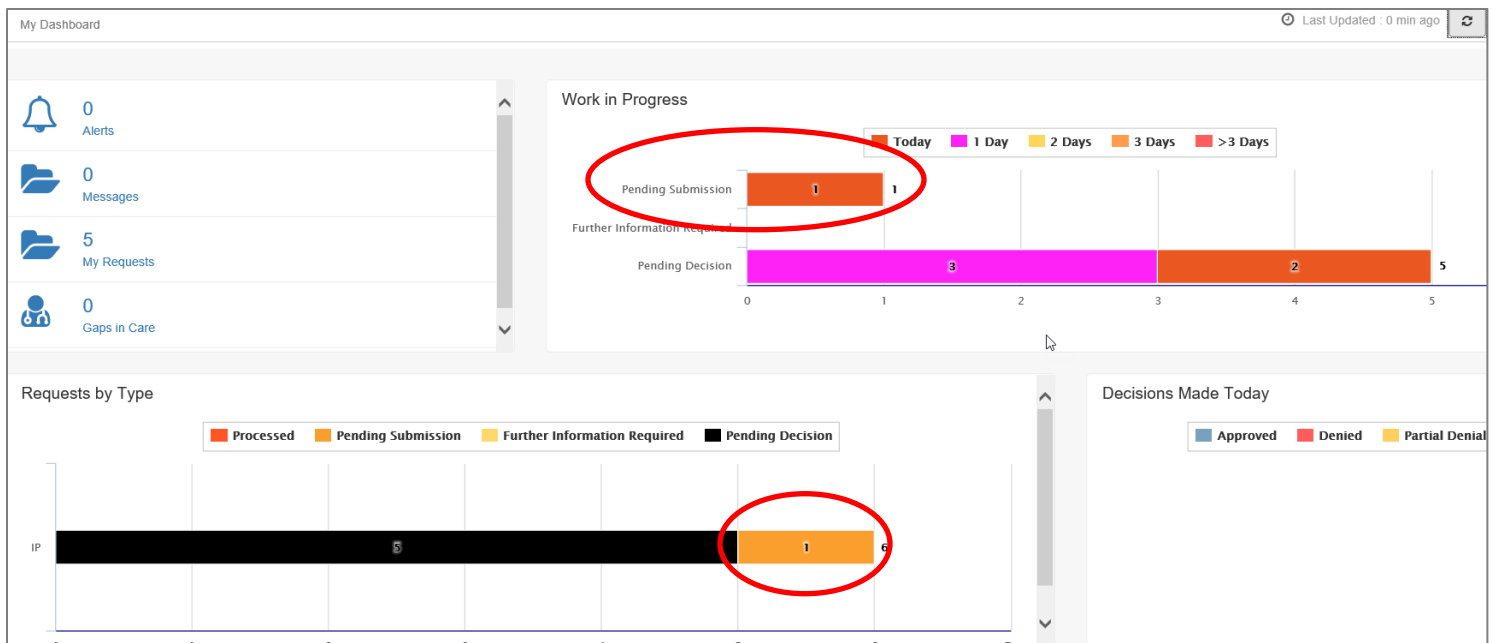


This is a shared note field. Notes can be viewed and entered by both you and the Plan.

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. | Click on the Save as Draft button to save your request. <div> Submit Save as Draft Cancel </div> <p>Note: The Submit button will not be active until a clinical review has been completed.</p> |
| 2. | You will be taken to the top of the request where you will see that it is now in Draft status (upper left corner). <div>Inpatient Request (Draft)</div> |
| 3. | 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. |





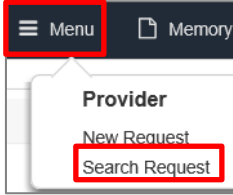
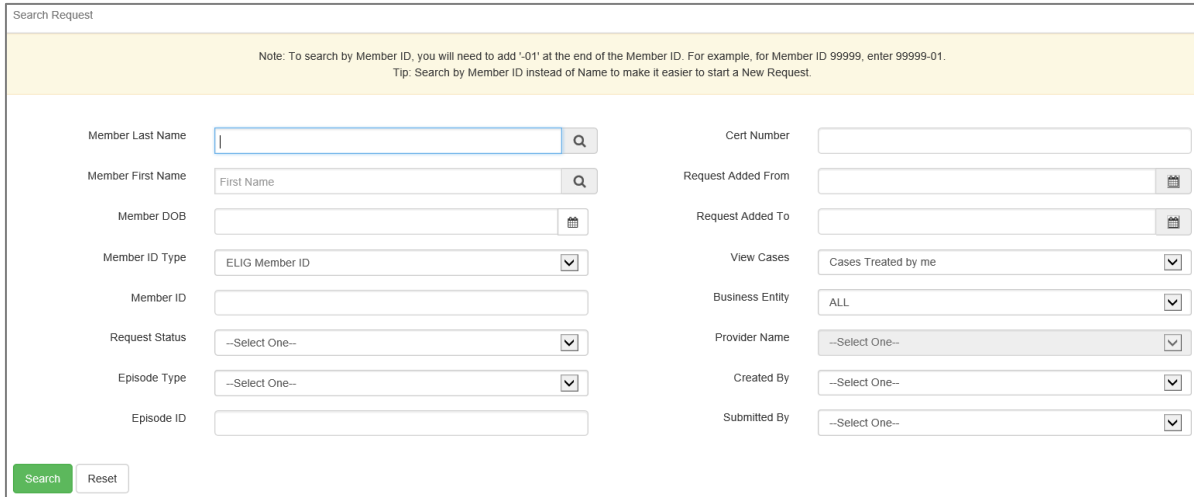
5

5 ADD CLINICAL TO AN EXISTING IP NON-CLINICAL REQUEST

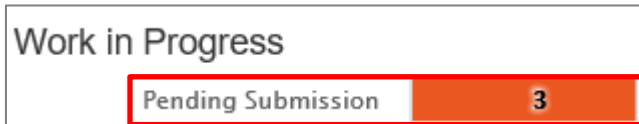
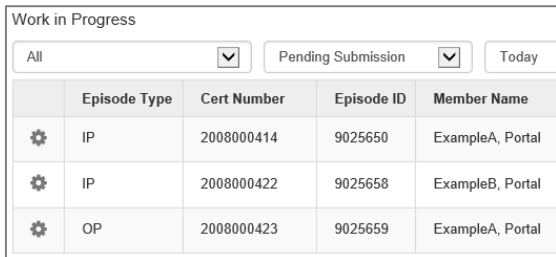
How to Add Clinical Information to Existing IP Non-Clinical Request

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>  |

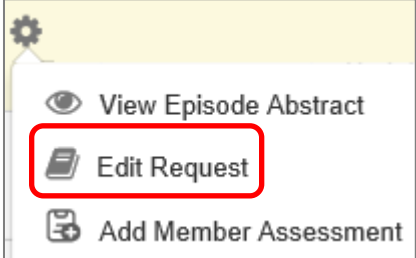

How to Add Clinical Information to Existing IP Non-Clinical Request

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> <div><p>Requests by Type</p><div><div>Processed</div><div>Pending Submission</div><div>Further Information Required</div><div>Pending Decision</div></div><div><div>IP</div><div>5</div><div>2</div></div><div><div>OP</div><div>1</div><div>1</div></div></div> | | | | | | | | | | | | | | | |
| 2. | <p>All Pending Submission requests for that Episode Type will be displayed.</p> <div><p>Requests by Type</p><div><div>Inpatient</div><div>Pending Submission</div><div>Date Range</div></div><table><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></div> | | 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.


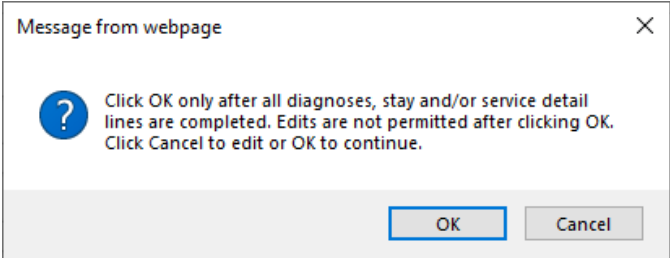
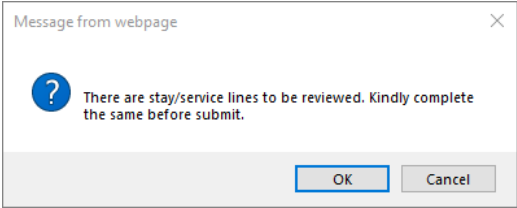
| Step | Action |
|------|---|
| 1. | <p>Click on the ⚙ icon to the left of the episode and select Edit Request.</p> <div></div> <p>Note: Depending on how you accessed the episode, you may see different options under the gear.</p> |
| 2. | <p>The request will open and is read to be updated.</p> |

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

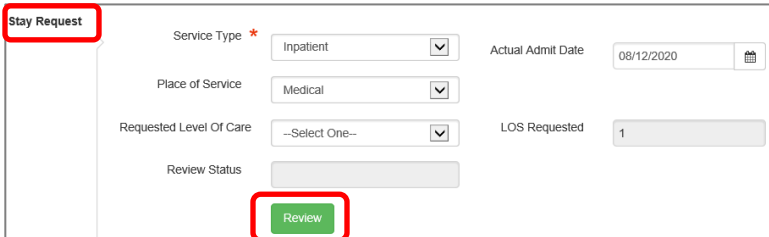

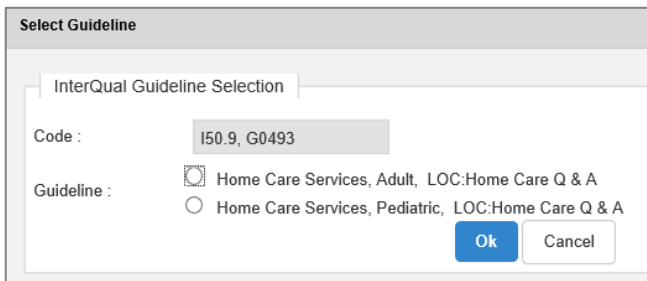
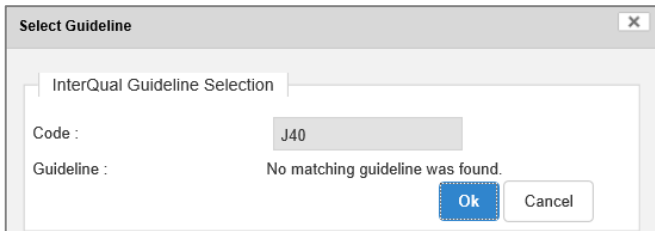
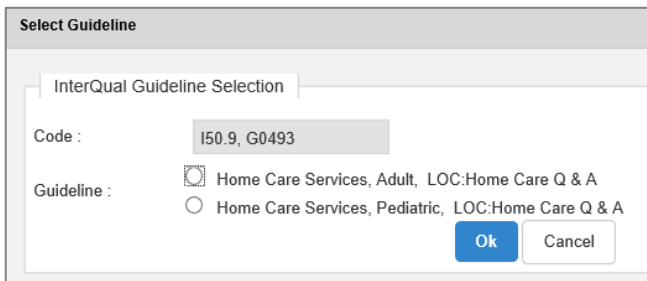
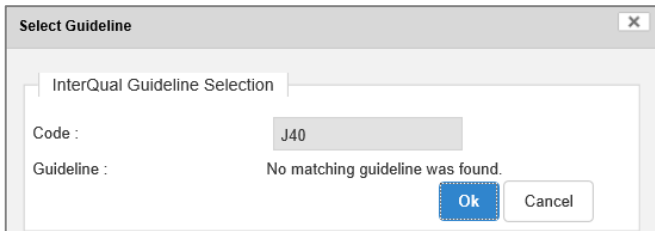
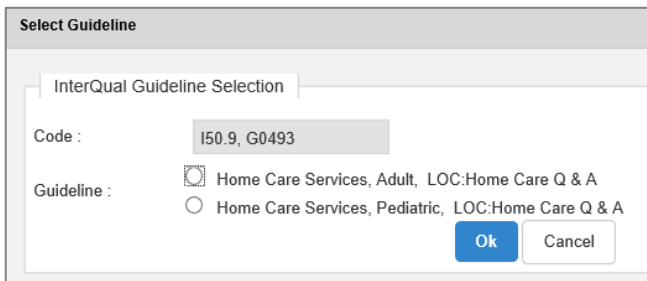
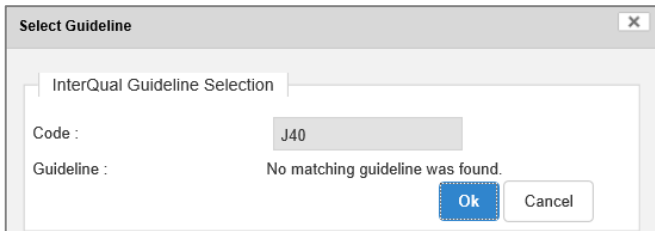


If you need training or have questions regarding the use of InterQual Connect criteria, please contact your facility InterQual trainer or contact your Change HealthCare account representative.

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"> <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. | | | | | | |
| 5. | <p>The system will connect with InterQual and determine if there is a matching guideline.</p> <table border="1"> <thead> <tr> <th>If there is...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Matching Guideline</td><td> <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <i>Proceed to Step 6 in this section.</i></p>  </td></tr> <tr> <td>No Matching Guideline</td><td> <p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. <i>Proceed to Adding Documents.</i></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. <i>Proceed to Step 6 in this section.</i></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. <i>Proceed to Adding Documents.</i></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. <i>Proceed to Step 6 in this section.</i></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. <i>Proceed to Adding Documents.</i></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. | <div>From the Recommendations page:</div> <table><tr><th>If you click...</th><th>Then...</th></tr><tr><td>Save</td><td>The review will be saved and can be updated, if needed, prior to submitting the request.</td></tr><tr><td>Complete</td><td>The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td></tr></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 Jiva 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.

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

Assessment Score 0 of 9

Provider Portal Delivery Screening Assessment

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><div>Documents</div><div><div>Document Title *</div><div>Clinical Information</div><div>Document Description</div><div>Can enter a document description here.</div><div>Document Type</div><div>Medical Document</div><div>Select Document</div><div>Browse</div><div>PP Example Document.docx</div></div></div> |

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. |



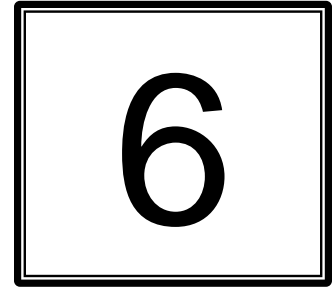
This is a shared note field. Notes can be viewed and entered by both you and the Plan.

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> <div> Submit Save as Draft Delete Cancel </div> <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 |
| | 12548538 | 27428(CPT) | 1 | 0 | 0 | | | Inpatient | Per Day |
| | | | | | | | | | Decision |
| | | | | | | | | | 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. At the top is a header bar with fields for '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 drop-down caret on the right side of the 'Allergies' tab. Below the tabs is a section titled 'Outpatient Request'. On the left is a sidebar with 'Episode Details' selected. The main area contains 'Request Type *' with a dropdown menu showing 'Expected', and 'Request Priority *' with a dropdown menu showing 'Standard 24'. A blue hyperlink labeled 'Optional Fields' 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 'Optional Fields' section of the 'Outpatient Request' form. It includes 'Request Type *' (Expected) and 'Request Priority *' (Standard 24). Below these, a red box highlights two new fields: 'Time Request' with a text input showing '24 Hours', and 'Reason for Request' with a dropdown menu showing '--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 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 *

ICD10

Diagnosis *

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. <div><table><tr><th>Primary Dx</th><th>Code Type</th><th>Diagnosis</th><th>Actions</th></tr><tr><td>★</td><td>ICD10</td><td>I50.9—Heart failure, unspecified</td><td></td></tr><tr><td>☆</td><td>ICD10</td><td>R69—Illness, unspecified</td><td>⊖</td></tr></table></div> | 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><tr><th>If you...</th><th>Then...</th></tr><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></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. | | | | | | | | | | | | |


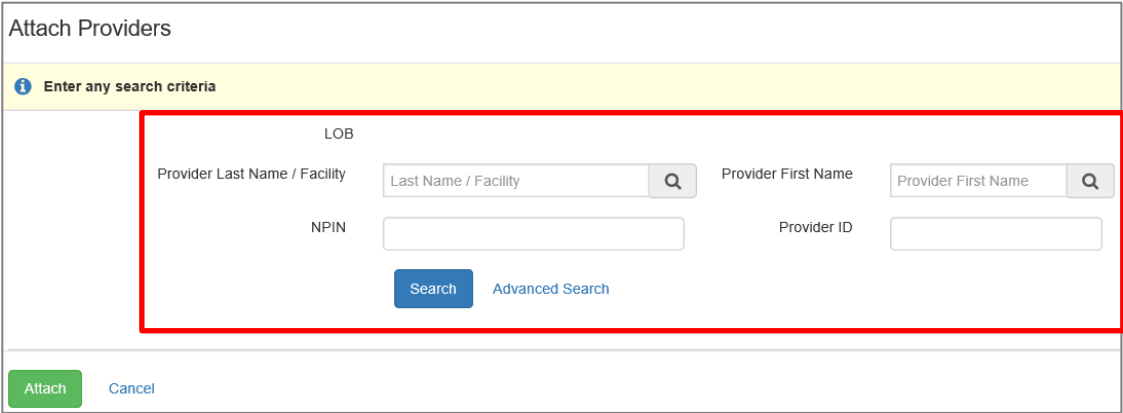
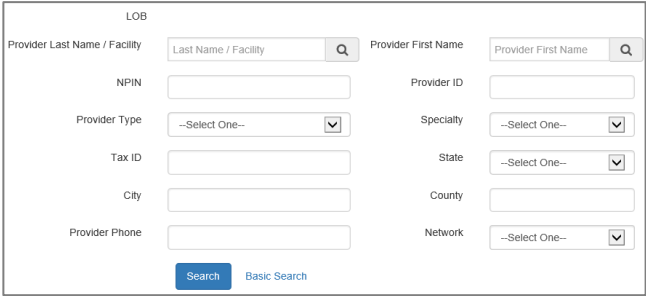
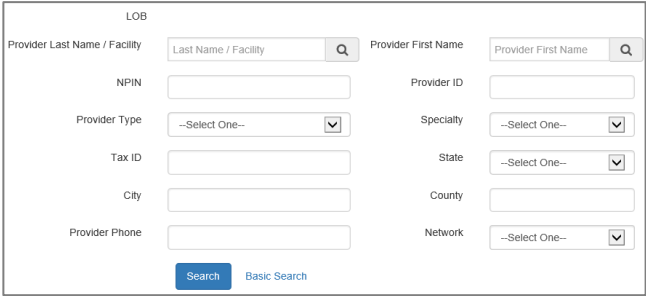
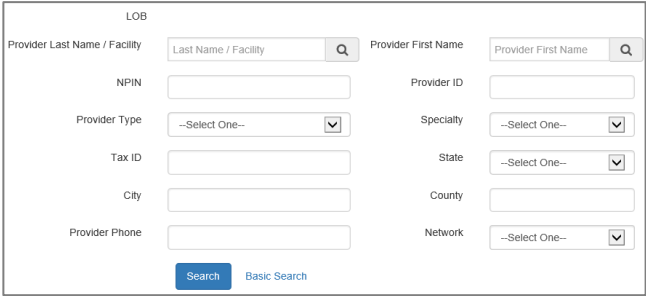
Adding a New OP Clinical Request – Adding Providers

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.







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> <tr> <th>If appropriate provider...</th><th>Then...</th></tr> <tr> <td>Is displayed</td><td>Click the Attach button</td></tr> <tr> <td>Is not displayed</td><td> <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p>  </td></tr> </table> | If appropriate provider... | Then... | Is displayed | Click the Attach button | Is not 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 | | | | | | |
| Is not displayed | <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p>  | | | | | | |



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 ▼ | |
| <div>  Single Attach  Multiple Attach  Set as Favorite </div> | | | | | | |

| 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... |
|--|---|
| <u>Attach multiple providers to an episode at the same time</u> | <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  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 | Q |
| | 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><tr><th colspan="7">Service Request</th></tr><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></tr><tr><td></td><td>G0493(HCPC)</td><td>5</td><td>08/17/2020</td><td>09/01/2020</td><td>Home</td><td>Medical</td></tr><tr><td></td><td>S9131(HCPC)</td><td>14</td><td>08/19/2020</td><td>09/02/2020</td><td>Home</td><td>Medical</td></tr></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 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |


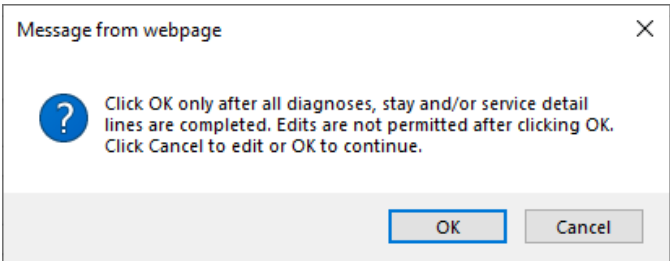
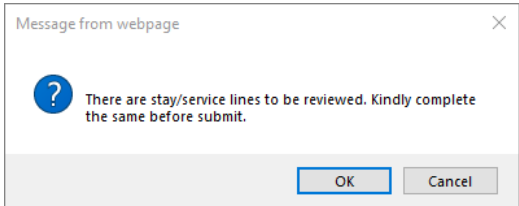
Adding a New OP Clinical Request – InterQual

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.  |
| 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> |
| 3. | <p>Once determined that one or both exists, you will receive the following pop-up message. Click OK.</p>  |

Adding a New OP Clinical Request – InterQual, cont.

| Step | Action | | | | | | | | | | | | | | | | | | |
|------------------------------|--|----------------|-------------------------------------|---------------------------|--|------------------------------|--|---------------|------------------|---------------|--|-------------------------------------|------------|---|------------|------------|-----------|---------|--|
| 4. | <p>Click the Review button.</p> <div><div>Review</div><div>Service Request</div><table><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><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></table></div> | 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 | |
| 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><tr><th>If there is...</th><th>Then...</th></tr><tr><td>Matching Guideline</td><td><p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <i>Proceed to Step 6 in this section.</i></p><div><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : I50.9, G0493</div><div>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</div><div><div>Ok</div><div>Cancel</div></div></div></div></td></tr><tr><td>No Matching Guideline</td><td><p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. <i>Proceed to Adding Documents.</i></p><div><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : J40</div><div>Guideline : No matching guideline was found.</div><div><div>Ok</div><div>Cancel</div></div></div></div></td></tr></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. <i>Proceed to Step 6 in this section.</i></p> <div><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : I50.9, G0493</div><div>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</div><div><div>Ok</div><div>Cancel</div></div></div></div> | 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. <i>Proceed to Adding Documents.</i></p> <div><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : J40</div><div>Guideline : No matching guideline was found.</div><div><div>Ok</div><div>Cancel</div></div></div></div> | | | | | | | | | | | | |
| 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. <i>Proceed to Step 6 in this section.</i></p> <div><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : I50.9, G0493</div><div>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</div><div><div>Ok</div><div>Cancel</div></div></div></div> | | | | | | | | | | | | | | | | | | |
| 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. <i>Proceed to Adding Documents.</i></p> <div><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : J40</div><div>Guideline : No matching guideline was found.</div><div><div>Ok</div><div>Cancel</div></div></div></div> | | | | | | | | | | | | | | | | | | |

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. | <div>From the Recommendations page:</div> <table><tr><th>If you click...</th><th>Then...</th></tr><tr><td>Save</td><td>The review will be saved and can be updated, if needed, prior to submitting the request.</td></tr><tr><td>Complete</td><td>The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td></tr></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 Jiva 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><div>Documents</div><div><div>Document Title *</div><div>Clinical Information</div><div>Document Description</div><div>Can enter a document description here.</div><div>Document Type</div><div>Medical Document</div><div>Select Document</div><div>Browse</div><div>PP Example Document.docx</div></div></div> |

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 ✓

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⬆

| 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. |



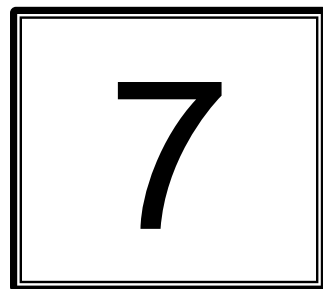
This is a shared note field. Notes can be viewed and entered by both you and the Plan.

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> <div> Submit Save as Draft Delete Cancel </div> <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 | | | | | | | | | | |
| <p>Expected Decision Date : 08/15/2020 Authorization Type OP Episode Number : 9025648 Episode Status : OpenRequest Cert Number 2008000412</p> | | | | | | | | | | |
| 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 of a web application interface. At the top, there is a header bar with fields for '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 drop-down caret on the right side of the 'Allergies' tab. Below the tabs is a section titled 'Outpatient Request'. Inside this section, 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 'Optional Fields' section of the 'Outpatient Request' form. It is a continuation of the form from the previous screenshot. The 'Request Type *' dropdown is still set to 'Expected' and the 'Request Priority *' dropdown is still set to 'Standard 24'. Below these, there are two new fields: 'Time Request' with a text input containing '24 Hours', and 'Reason for Request' with a dropdown menu set to '--Select One--'. A red box highlights these two new 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 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.*"

Diagnosis
















Code Type *

ICD10

Diagnosis *

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. <div><table><tr><th>Primary Dx</th><th>Code Type</th><th>Diagnosis</th><th>Actions</th></tr><tr><td></td><td>ICD10</td><td>I50.9—Heart failure, unspecified</td><td></td></tr><tr><td></td><td>ICD10</td><td>R69—Illness, unspecified</td><td></td></tr></table></div> | 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><tr><th>If you...</th><th>Then...</th></tr><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></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. | | | | | | | | | | | | |


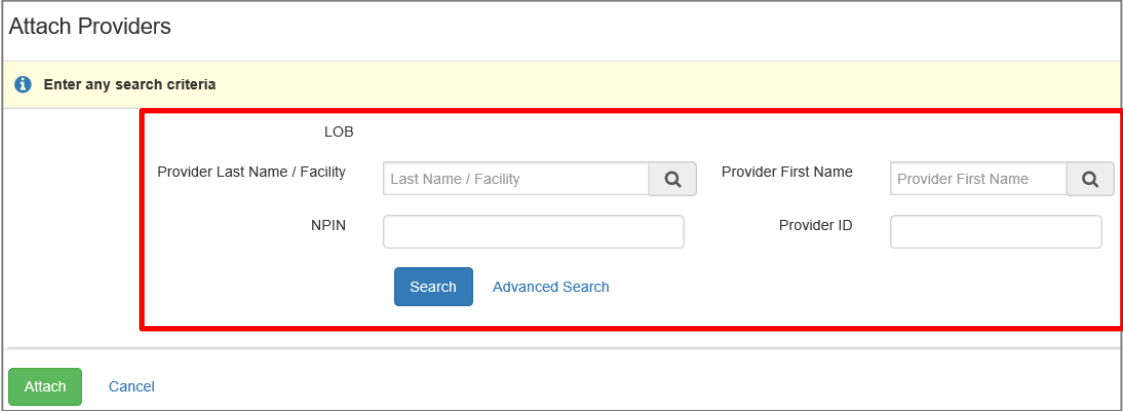
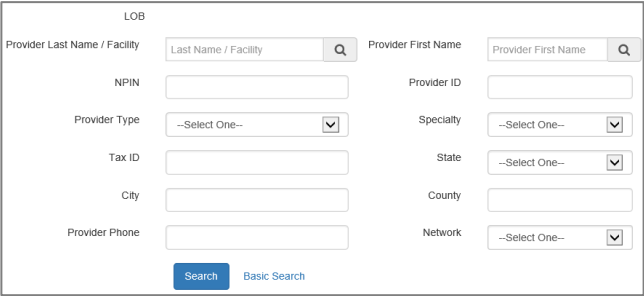
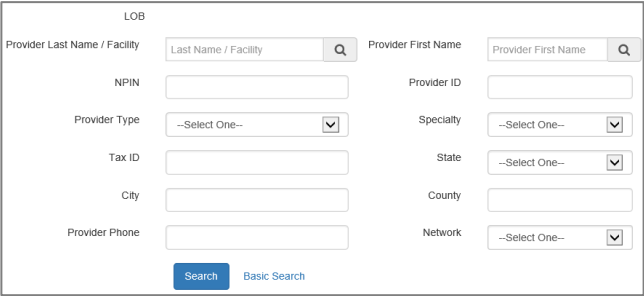
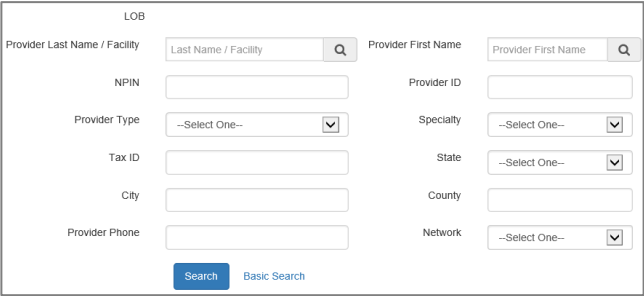
Adding a New OP Non-Clinical Request – Adding Providers

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.







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> <tr> <th>If appropriate provider...</th><th>Then...</th></tr> <tr> <td>Is displayed</td><td>Click the Attach button</td></tr> <tr> <td>Is not displayed</td><td> <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p>  </td></tr> </table> | If appropriate provider... | Then... | Is displayed | Click the Attach button | Is not 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 | | | | | | |
| Is not displayed | <p>You may use the Advanced Search functionality and click the Attach button after locating the provider</p>  | | | | | | |





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  | |
| <div>  Single Attach  Multiple Attach  Set as Favorite </div> | | | | | | |

| 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... |
|--|---|
| <u>Attach multiple providers to an episode at the same time</u> | <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  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 | Q |
| | 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 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><tr><th colspan="7">Service Request</th></tr><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></tr><tr><td></td><td>G0493(HCPC)</td><td>5</td><td>08/17/2020</td><td>09/01/2020</td><td>Home</td><td>Medical</td></tr><tr><td></td><td>S9131(HCPC)</td><td>14</td><td>08/19/2020</td><td>09/02/2020</td><td>Home</td><td>Medical</td></tr></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. |

Documents

Document Title *

Clinical Information

Document Description

Can enter a document description here.

Document Type

Medical Document

▼

Select Document

Browse

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 ▼

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⬆ ⬇ ⬆

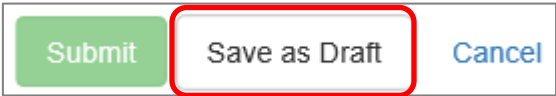

| Step | Action |
|------|--|
| 1. | Select the appropriate Note Type from the drop-down menu. |
| 2. | Enter the appropriate notes in the notes section. Be sure to include your name and contact information in the event the Plan needs to contact you. |

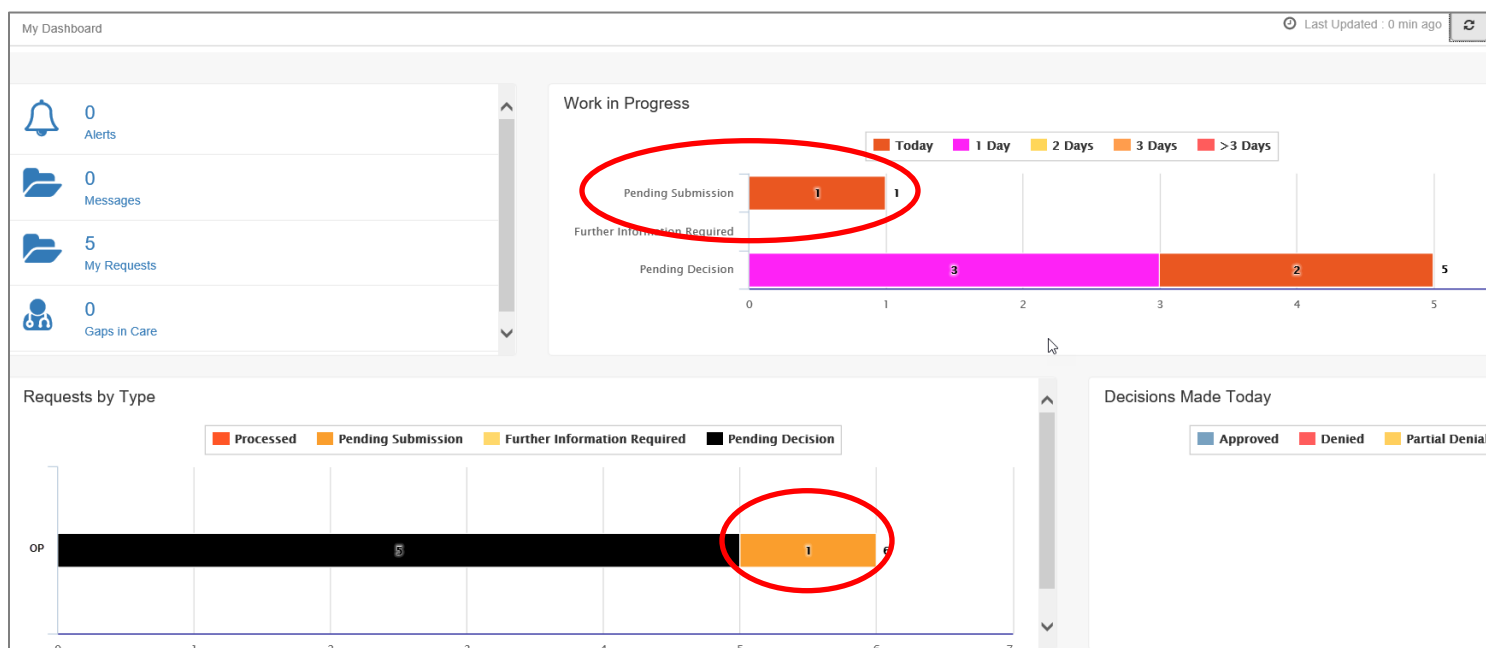


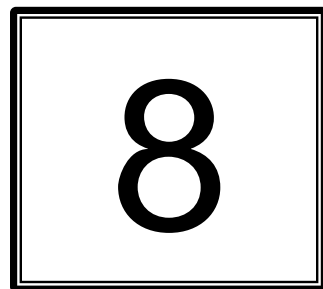
This is a shared note field. Notes can be viewed and entered by both you and the Plan.

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. | Click on the Save as Draft button to submit your request.  Note: The Submit button will not be active until a clinical review has been completed. |
| 2. | You will be taken to the top of the request where you will see that it is now in Draft status (upper left corner).  |
| 3. | 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. |



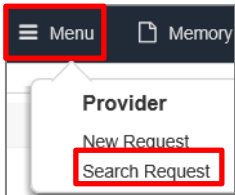
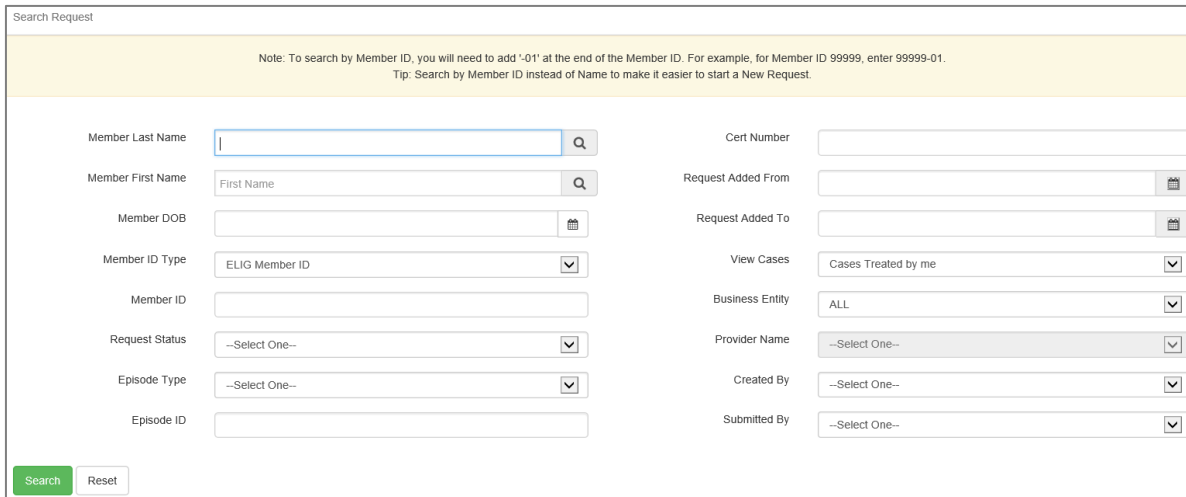


8 ADD CLINICAL TO AN EXISTING OP NON-CLINICAL REQUEST

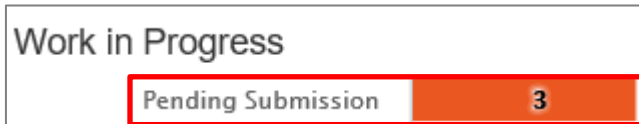
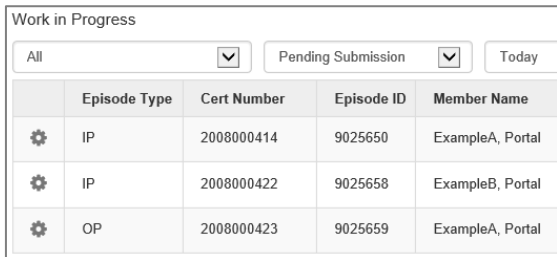
Adding Clinical Information to an Existing OP Non-clinical Request

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: 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>  |

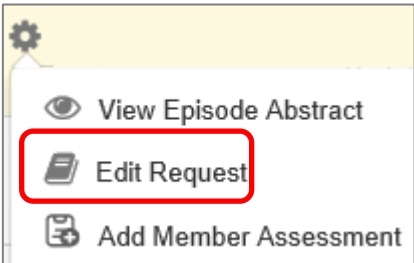
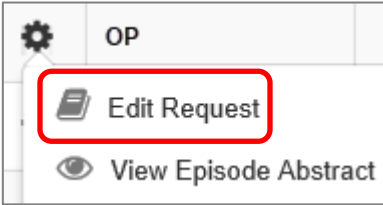
Adding Clinical Information to Existing OP Non-Clinical Request, continued

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> <div><p>Requests by Type</p><div><div>Processed</div><div>Pending Submission</div><div>Further Information Required</div><div>Pending Decision</div></div><table><tr><td>IP</td><td colspan="4">5</td><td colspan="2">2</td></tr><tr><td>OP</td><td>1</td><td>1</td><td></td><td></td><td></td></tr></table></div> | IP | 5 | | | | 2 | | OP | 1 | 1 | | | |
| IP | 5 | | | | 2 | | | | | | | | | |
| OP | 1 | 1 | | | | | | | | | | | | |
| 2. | <p>All Pending Submission requests for that Episode Type will be displayed.</p> <div><p>Work in Progress</p><div><div>All</div><div>Pending Submission</div><div>Today</div></div><table><tr><th></th><th>Episode Type</th><th>Cert Number</th><th>Episode ID</th><th>Member Name</th></tr><tr><td></td><td>OP</td><td>2008000423</td><td>9025659</td><td>ExampleA, Portal</td></tr></table></div> | | 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></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> |


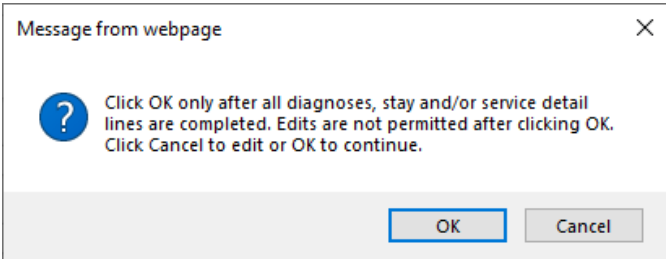
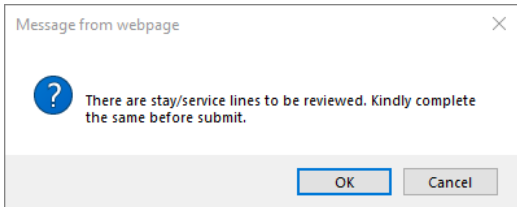
Adding Clinical Information to Existing OP Non-Clinical Request – InterQual

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> <div><div>Review</div><div>Service Request</div><table><tr><th>Action</th><th></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><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></table></div> | 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><tr><th>If there is...</th><th>Then...</th></tr><tr><td>Matching Guideline</td><td><p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <i>Proceed to Step 6 in this section.</i></p><div><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : 150.9, G0493</div><div>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</div><div><div>Ok</div><div>Cancel</div></div></div></div></td></tr><tr><td>No Matching Guideline</td><td><p>You will receive this pop-up. Click OK to close the window and you will be returned to the request screen. <i>Proceed to Adding Documents.</i></p><div><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : J40</div><div>Guideline : No matching guideline was found.</div><div><div>Ok</div><div>Cancel</div></div></div></div></td></tr></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. <i>Proceed to Step 6 in this section.</i></p> <div><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : 150.9, G0493</div><div>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</div><div><div>Ok</div><div>Cancel</div></div></div></div> | 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. <i>Proceed to Adding Documents.</i></p> <div><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : J40</div><div>Guideline : No matching guideline was found.</div><div><div>Ok</div><div>Cancel</div></div></div></div> | | | | | | | | | | | | |
| 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. <i>Proceed to Step 6 in this section.</i></p> <div><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : 150.9, G0493</div><div>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</div><div><div>Ok</div><div>Cancel</div></div></div></div> | | | | | | | | | | | | | | | | | | |
| 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. <i>Proceed to Adding Documents.</i></p> <div><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : J40</div><div>Guideline : No matching guideline was found.</div><div><div>Ok</div><div>Cancel</div></div></div></div> | | | | | | | | | | | | | | | | | | |

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. | <p>From the Recommendations page:</p> <table> <tr> <th>If you click...</th><th>Then...</th></tr> <tr> <td>Save</td><td>The review will be saved and can be updated, if needed, prior to submitting the request.</td></tr> <tr> <td>Complete</td><td>The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td></tr> </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 Jiva 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.

| Assessments | | |
|----------------------------------|---------------|---------------------|
| New In Progress Completed Voided | | |
| Assessment Title | Identified On | Assessment Added By |
| Sample Assessment | 11/23/2020 | Sentinel |

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 Assessment 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 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><div>Documents</div><div><div>Document Title *</div><div>Clinical Information</div></div><div><div>Document Type</div><div>Medical Document</div></div><div><div>Select Document</div><div><div>Browse</div><div>PP Example Document.docx</div></div></div><div><div>Document Description</div><div>Can enter a document description here.</div></div></div> |

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

Notes

Note Type

--Select One--

▼

Note Encounter Date

08/13/2020

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Note Encounter Time

08

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Note Text

File ▼ Edit ▼ View ▼ Format ▼ Tools ▼

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| 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. |



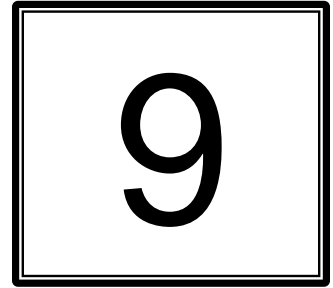
This is a shared note field. Notes can be viewed and entered by both you and the Plan.

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> <div> Submit Save as Draft Delete Cancel </div> <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 | | | | | | | | | | |
| <p>Expected Decision Date : 08/15/2020 Authorization Type OP Episode Number : 9025648 Episode Status : OpenRequest Cert Number 2008000412</p> | | | | | | | | | | |
| 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

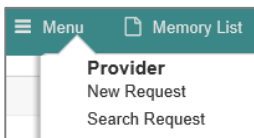
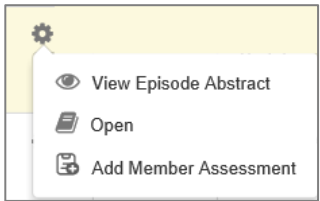
Search Request

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 | <input type="text" value="Last Name"/> | Q | Cert Number | <input type="text"/> |
| Member First Name | <input type="text" value="First Name"/> | Q | Request Added From | <input type="text"/> |
| Member DOB | <input type="text"/> | 📅 | Request Added To | <input type="text"/> |
| Member ID Type | ELIG Member ID | ▼ | View Cases | Cases Treated by me ▼ |
| Member ID | <input type="text"/> | | Business Entity | ALL ▼ |
| Request Status | --Select One-- | ▼ | Provider Name | --Select One-- ▼ |
| Episode Type | --Select One-- | ▼ | Created By | --Select One-- ▼ |
| Episode ID | <input type="text"/> | | Submitted By | --Select One-- ▼ |

Search

| 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

Last Name

Q

Member First Name

First Name

Q

Member DOB

Member ID Type

ELIG Member ID

Member ID

Request Status

--Select One--

Episode Type

--Select One--

Episode ID

Cert Number

Request Added From

Request Added To

View Cases

Cases Treated by me

Business Entity

ALL

Provider Name

--Select One--

Created By


--Select One--

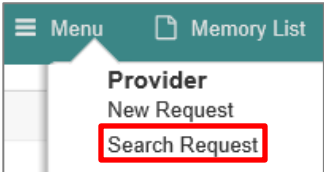
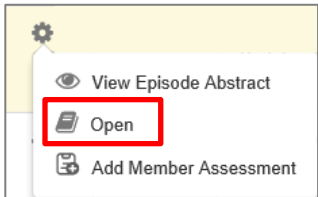
Submitted By

--Select One--

Search

Reset

| 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. | <p>Click Menu and select Search Request</p>  |
| 2. | <p>Enter the "certification number" in the Cert Number field.</p> <p>Note – You can also search using the member ID or name/DOB.</p> |
| 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. | <p>Click the gear icon in the Action column and select Open</p>  |

Extending an Existing Request, cont.

Member Overview > IP(9026529)

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

Review Extension Add

Stay Request Discharge

| | 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

Note

Diagnosis

| Primary Dx | Code Type | Diagnosis |
|------------|-----------|--|
| ★ | ICD10 | J40--Bronchitis, not specified as acute or chronic |

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

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

Request Received Time * 09 27

Request Type * --Select One--

Request Priority * --Select One--

Time Request

Due Date

Save Cancel

Member Overview > IP(9026532)

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

Add

Immediate Due Date 09/16/2020 10:11

Stay Request Discharge

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

Note

Diagnosis

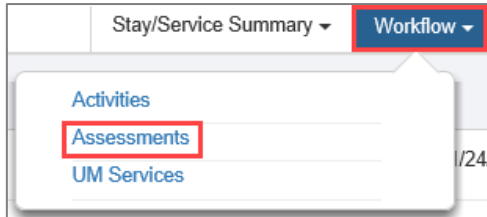
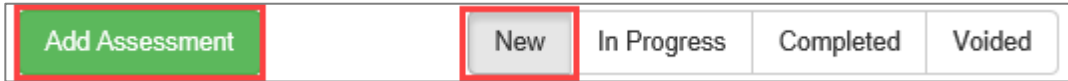
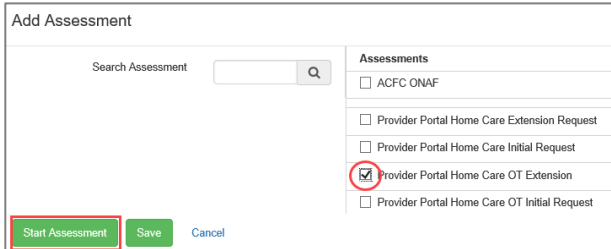
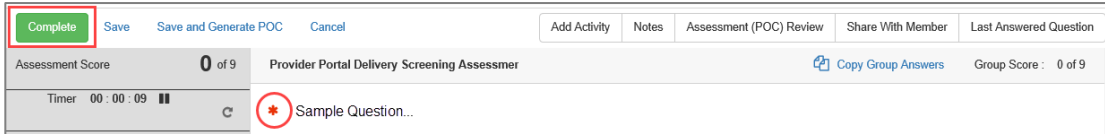
| Primary Dx | Code Type | Diagnosis |
|------------|-----------|-----------------------------------|
| ★ | ICD10 | I50.9--Heart failure, unspecified |



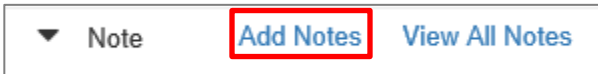
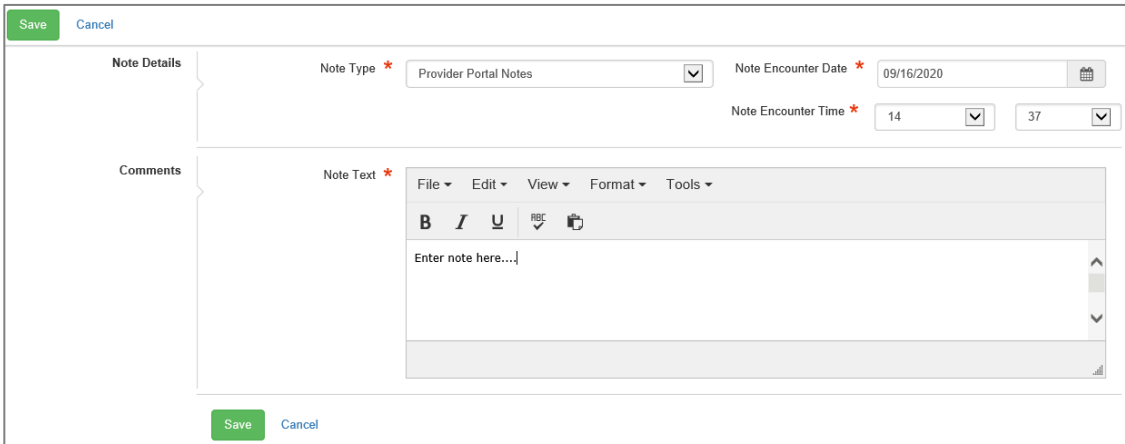

Clicking Save will submit your extension request. However, you must enter a note and attach any appropriate documentation to support the extension request.

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

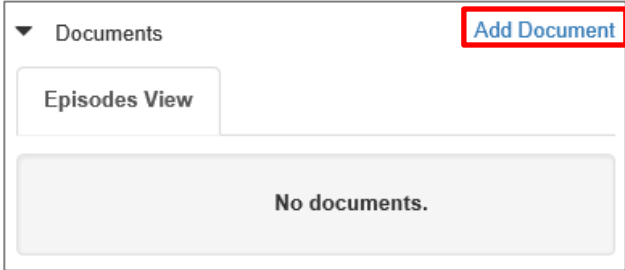
| Step | Action |
|------|--|
| 1. | <p>Within the Note widget on the right side of the episode screen, click on Add Notes</p>  |
| 2. | <p>Enter the appropriate notes for the extension in the notes section. Be sure to include your name and contact information in the event the Plan needs to contact you.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



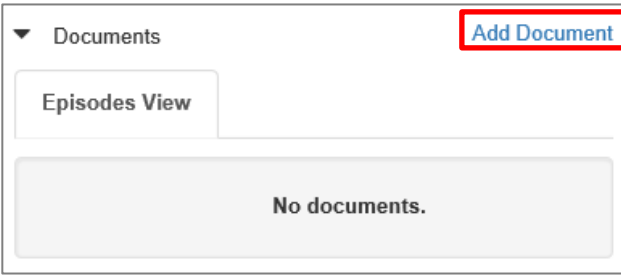
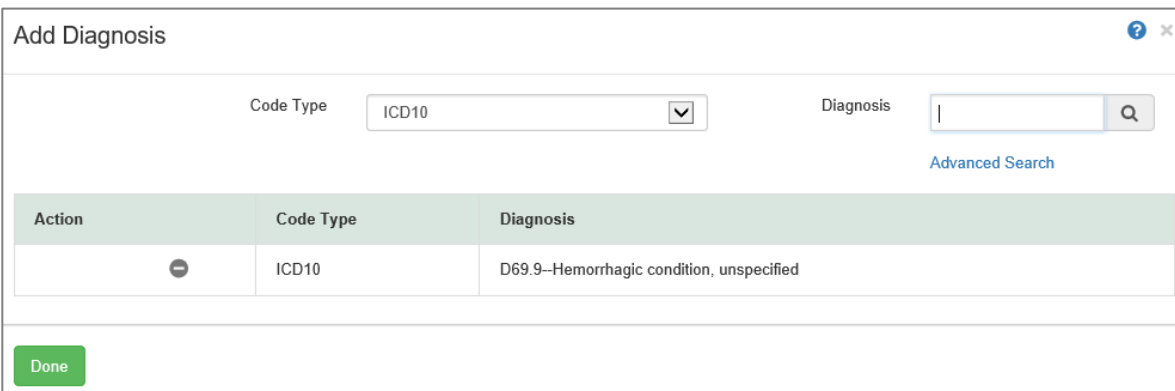
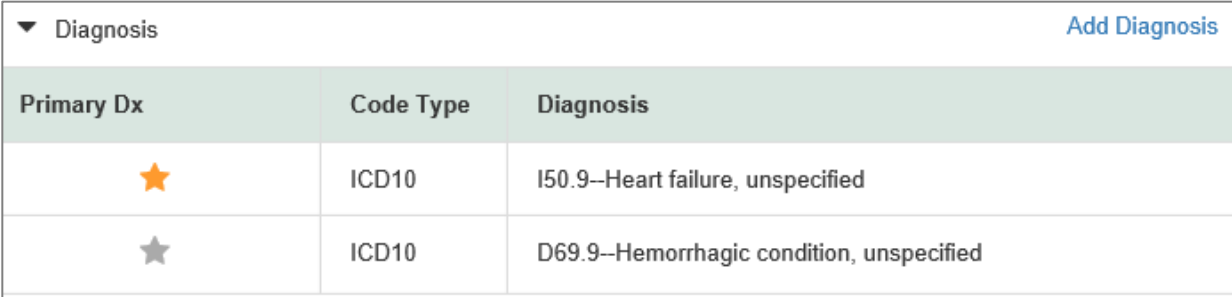
This is a shared note field. Notes can be viewed and entered by both you and the plan.

Extending an Existing Request – Adding Documents

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

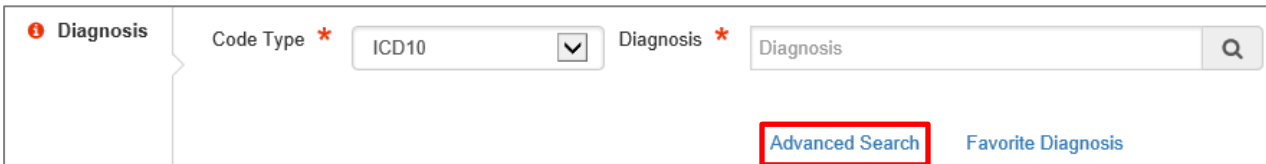
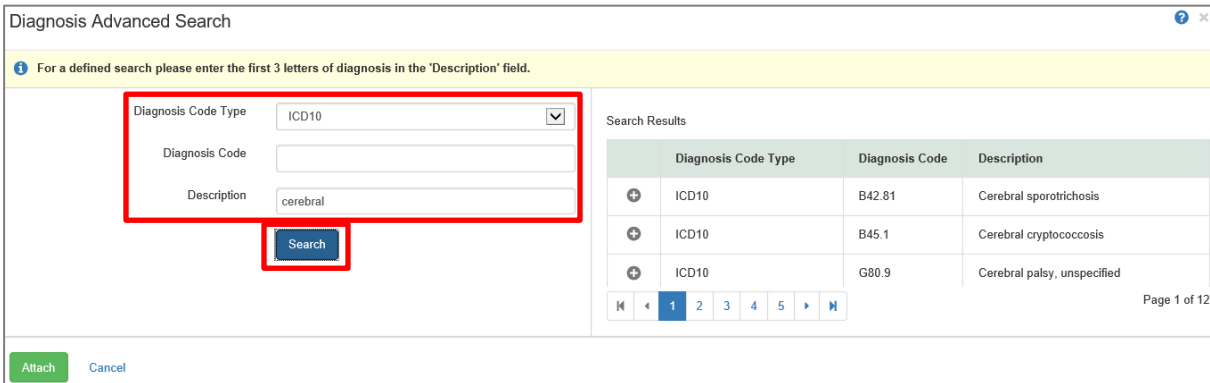
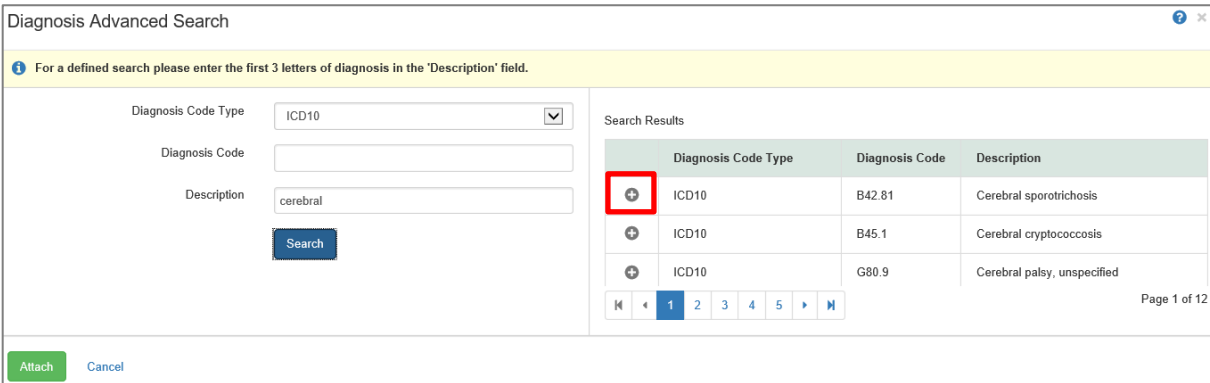
| Step | Action |
|------|---|
| 1. | <p>Within the Documents widget on the right side of the episode screen, click on Add Document</p>  |
| 2. | <p>Upload any clinical documentation to support the request for extension</p> |

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>  |
| 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>  |
| 4. | <p>The new diagnosis will now be displayed in the Diagnosis widget</p>  |

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.


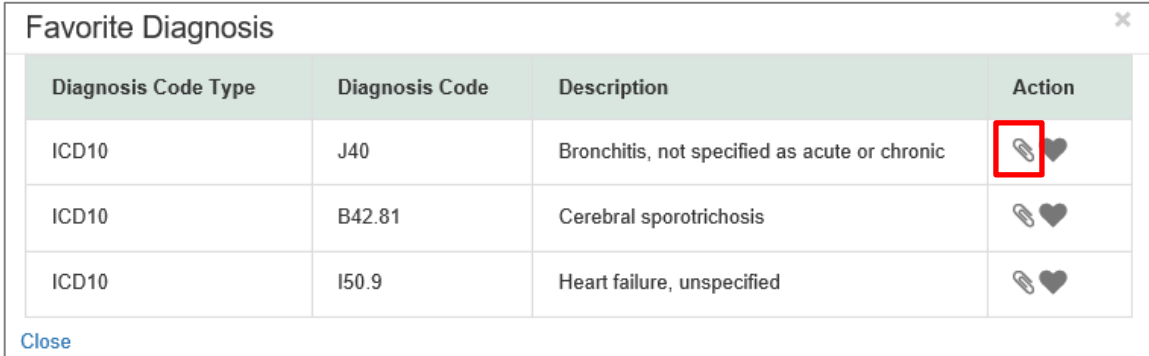


















| Step | Action |
|------|---|
| 1. | <p>When creating an episode, click on the Advanced Search hyperlink to search for a diagnosis</p>  <p>The screenshot shows a 'Diagnosis' form with a 'Code Type' dropdown set to 'ICD10' and a 'Diagnosis' search field. The 'Advanced Search' button is highlighted with a red box, and the 'Favorite Diagnosis' button is visible next to it.</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. The 'Diagnosis Code Type' is set to 'ICD10', the 'Diagnosis Code' field is empty, and the 'Description' field contains 'cerebral'. The 'Search' button is highlighted with a red box. The search results table on the right shows three results: 'Cerebral sporotrichosis' (B42.81), 'Cerebral cryptococcosis' (B45.1), and 'Cerebral palsy, unspecified' (G80.9).</p> |
| 3. | <p>Click on the + sign next to the appropriate diagnosis code</p>  <p>The screenshot shows the 'Diagnosis Advanced Search' dialog box. The 'Diagnosis Code Type' is set to 'ICD10', the 'Diagnosis Code' field is empty, and the 'Description' field contains 'cerebral'. The 'Search' button is highlighted with a red box. The search results table on the right shows three results: 'Cerebral sporotrichosis' (B42.81), 'Cerebral cryptococcosis' (B45.1), and 'Cerebral palsy, unspecified' (G80.9). The '+ sign' next to the first result is highlighted with a red box.</p> |

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><div>Selected Diagnosis List </div><table><thead><tr><th></th><th>Diagnosis Code Type</th><th>Diagnosis Code</th><th>Description</th><th>Action</th></tr></thead><tbody><tr><td></td><td>ICD10</td><td>B42.81</td><td>Cerebral sporotrichosis</td><td></td></tr></tbody></table><div><div>Attach</div><div>Cancel</div></div></div> <table><thead><tr><th>If...</th><th>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.

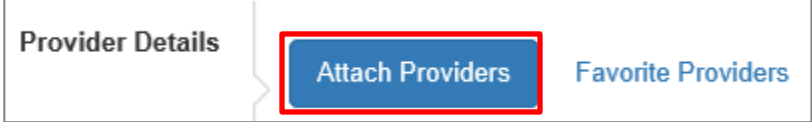

| Step | Action | | | | | | | | | | | | | | | | |
|---------------------|--|---|---|-------------|--------|-------|-----|---|---|-------|--------|-------------------------|---|-------|-------|----------------------------|---|
| 1. | <p>When creating an episode, click on the Favorite Diagnosis hyperlink</p>  <p>The screenshot shows a form with a 'Diagnosis' section. It includes a 'Code Type' dropdown set to 'ICD10' and a 'Diagnosis' search field. Below these are two links: 'Advanced Search' and 'Favorite Diagnosis', which is highlighted with a red rectangular box.</p> | | | | | | | | | | | | | | | | |
| 2. | <p>Click on the Attach Icon (paperclip) to add the diagnosis to the request.</p>  <p>The screenshot shows a 'Favorite Diagnosis' window with a table of saved diagnoses. The table has columns for 'Diagnosis Code Type', 'Diagnosis Code', 'Description', and 'Action'. The first row is highlighted, and the 'Attach Icon' (paperclip) in the 'Action' column is highlighted with a red rectangular box.</p> <table border="1"> <thead> <tr> <th>Diagnosis Code Type</th><th>Diagnosis Code</th><th>Description</th><th>Action</th></tr> </thead> <tbody> <tr> <td>ICD10</td><td>J40</td><td>Bronchitis, not specified as acute or chronic</td><td> </td></tr> <tr> <td>ICD10</td><td>B42.81</td><td>Cerebral sporotrichosis</td><td> </td></tr> <tr> <td>ICD10</td><td>I50.9</td><td>Heart failure, unspecified</td><td> </td></tr> </tbody> </table> <p>Close</p> | Diagnosis Code Type | Diagnosis Code | Description | Action | ICD10 | J40 | Bronchitis, not specified as acute or chronic |   | ICD10 | B42.81 | Cerebral sporotrichosis |   | ICD10 | I50.9 | Heart failure, unspecified |   |
| Diagnosis Code Type | Diagnosis Code | Description | Action | | | | | | | | | | | | | | |
| ICD10 | J40 | Bronchitis, not specified as acute or chronic |   | | | | | | | | | | | | | | |
| ICD10 | B42.81 | Cerebral sporotrichosis |   | | | | | | | | | | | | | | |
| ICD10 | I50.9 | Heart failure, unspecified |   | | | | | | | | | | | | | | |



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 buttons: 'Provider Details', 'Attach Providers' (highlighted with a red box), and 'Favorite Providers'.</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 icon Click on Set as Favorite  <p>The screenshot shows a table titled 'Search Results' with columns: Provider ID, Provider Name, Location, Type, and Provider Role. A gear icon in the first row is highlighted with a red box. A dropdown menu is open, showing three options: 'Single Attach', 'Multiple Attach', and 'Set as Favorite' (highlighted with a red box). The 'Type' column for the first row is 'Facility/Vendor' and the 'Provider Role' is 'Treating' with a dropdown arrow.</p> |

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.

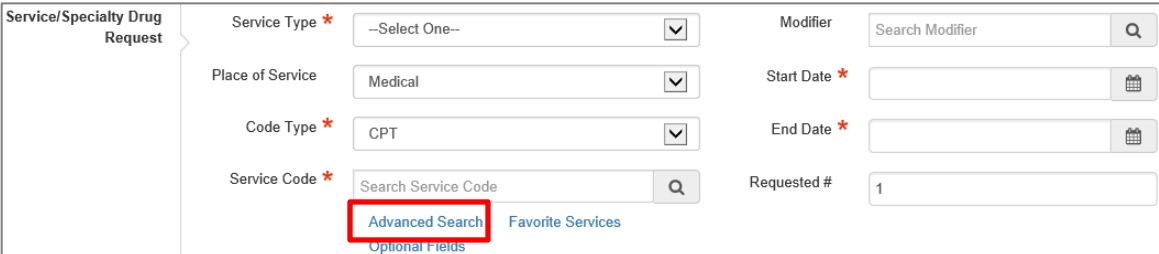
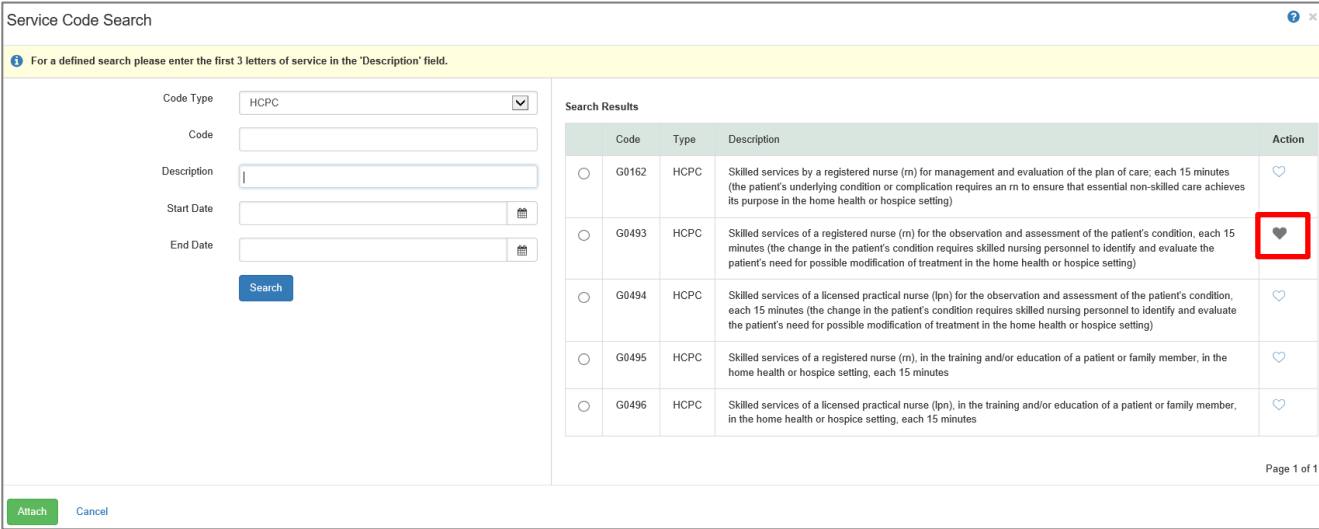
| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------|--|-------------|-----------------|---------------|----------------------|------------------|----------------------|------------------|---------------------|------------------|-------------------|------------------|-----------|---------|----------|--|--|-----------------|----------|-----|----------------|-----|-----------|------------|--|----------|--|-------|--|--|-------|----------|---------|----------------|--|-----------|------------|--|-------------------|--|
| 1. | <p>When creating an episode, click on the Favorite Providers hyperlink</p> <div><div>Provider Details</div><div><div>Attach Providers</div><div>Favorite Providers</div></div></div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. | <p>Click on the Attach Icon (paperclip) to add the provider to the request.</p> <div><div><div>Favorite Providers</div><table><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><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>10004</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></table><div>Close</div></div></div> | 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 | | 10004 | | | 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 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 10004 | | | 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>  |

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> <div><div>Service/Specialty Drug Request</div><div><div>Service Type *</div><div>--Select One--</div><div>Modifier</div><div>Search Modifier</div><div>Q</div></div><div><div>Place of Service</div><div>Medical</div><div>Start Date *</div><div></div><div></div></div><div><div>Code Type *</div><div>CPT</div><div>End Date *</div><div></div><div></div></div><div><div>Service Code *</div><div>Search Service Code</div><div>Q</div><div>Requested #</div><div>1</div></div><div><div>Advanced Search</div><div>Favorite Services</div><div>Optional Fields</div></div></div> | | | | | | | | | | | | | | | | |
| 2. | <p>Click on the Attach Icon (paperclip) to add the service code to the request.</p> <div><div>Favorite Services</div><div><table><tr><th>Service Code</th><th>Service Code Type</th><th>Description</th><th>Action</th></tr><tr><td>76825</td><td>CPT</td><td>Echocardiography, fetal, cardiovascular system, real time with image documentation (2D), with or without M-mode recording;</td><td></td></tr><tr><td>93308</td><td>CPT</td><td>Echocardiography, transthoracic, real-time with image documentation (2D), includes M-mode recording, when performed, follow-up or limited study</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></table><div>Close</div></div></div> | Service Code | Service Code Type | Description | Action | 76825 | CPT | Echocardiography, fetal, cardiovascular system, real time with image documentation (2D), with or without M-mode recording; |  | 93308 | CPT | Echocardiography, transthoracic, real-time with image documentation (2D), includes M-mode recording, when performed, follow-up or limited study |   | 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) |   |
| Service Code | Service Code Type | Description | Action | | | | | | | | | | | | | | |
| 76825 | CPT | Echocardiography, fetal, cardiovascular system, real time with image documentation (2D), with or without M-mode recording; |  | | | | | | | | | | | | | | |
| 93308 | CPT | Echocardiography, transthoracic, real-time with image documentation (2D), includes M-mode recording, when performed, follow-up or limited study |   | | | | | | | | | | | | | | |
| 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) |   | | | | | | | | | | | | | | |



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