Health Plan: Requesting Approval for Audits

For most Health Plan Requests, HEDIS or MRA Audits, [redacted] have been required seek approval from the [redacted] team *prior to* pulling records. This process will continue, however, the process to seek this approval is changing. Previously, [redacted] would need to email the request to a certain person or email address. Now, [redacted] can use the Health Plan area to seek approval.

NOTE: This is just for requests received at the facility. The process for Health Plan requests that are received to the corporate [redacted] team will continue with the process described in [redacted]

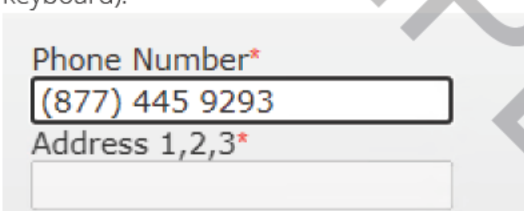
Create Health Plan

Imagine you review a new Health Plan request. If you already know that you need to seek approval, then you can start with Step 1 and skip to Step 6. Otherwise, start with Step 1 and continue.

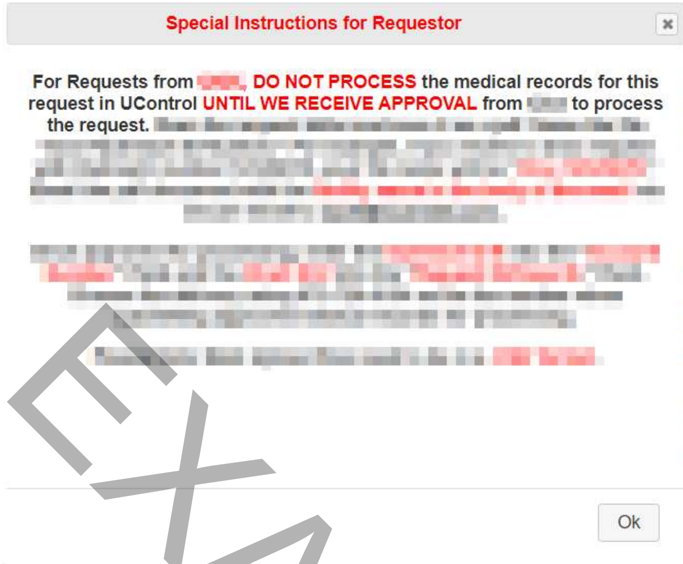
1) Log into [redacted] and select the correct facility.

2) Click on RELEASE and select CREATE.

3) Enter the phone number for the requestor in the PHONE NUMBER field, then click on TAB (on the keyboard).

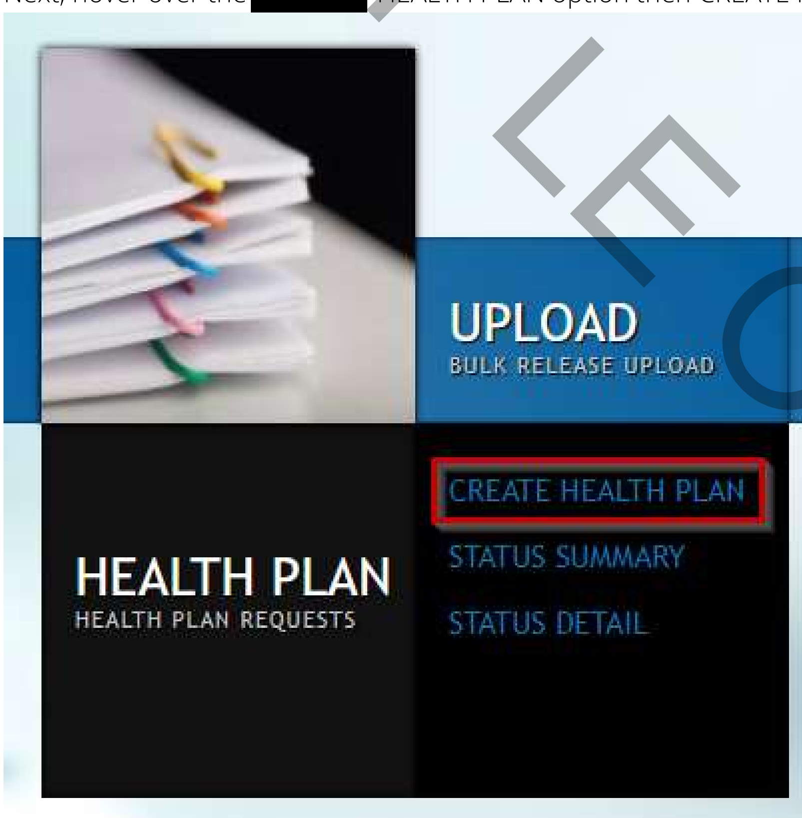


4) Review the pop-up and follow the instructions. **IF no instructions, then process the request as normal.**

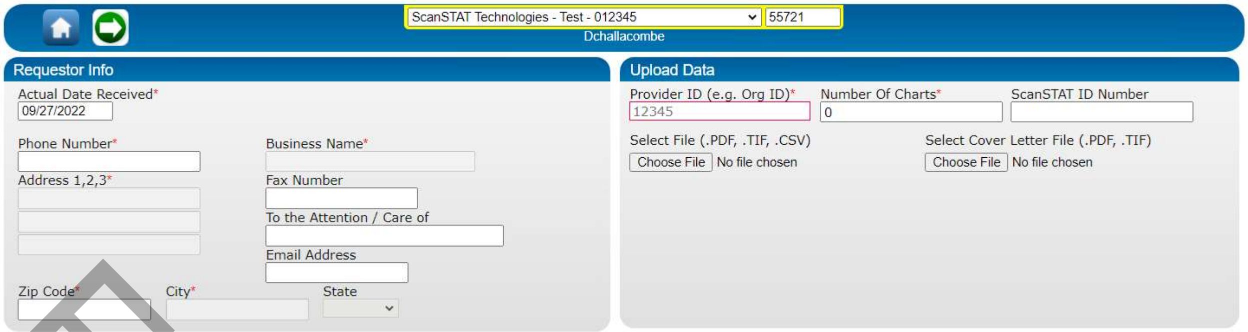


5) If the instructions require you to seek approval prior to processing, click on the trashcan icon to delete this release and go back to the Main Menu.

6) Next, hover over the [redacted] HEALTH PLAN option then CREATE HEALTH PLAN.

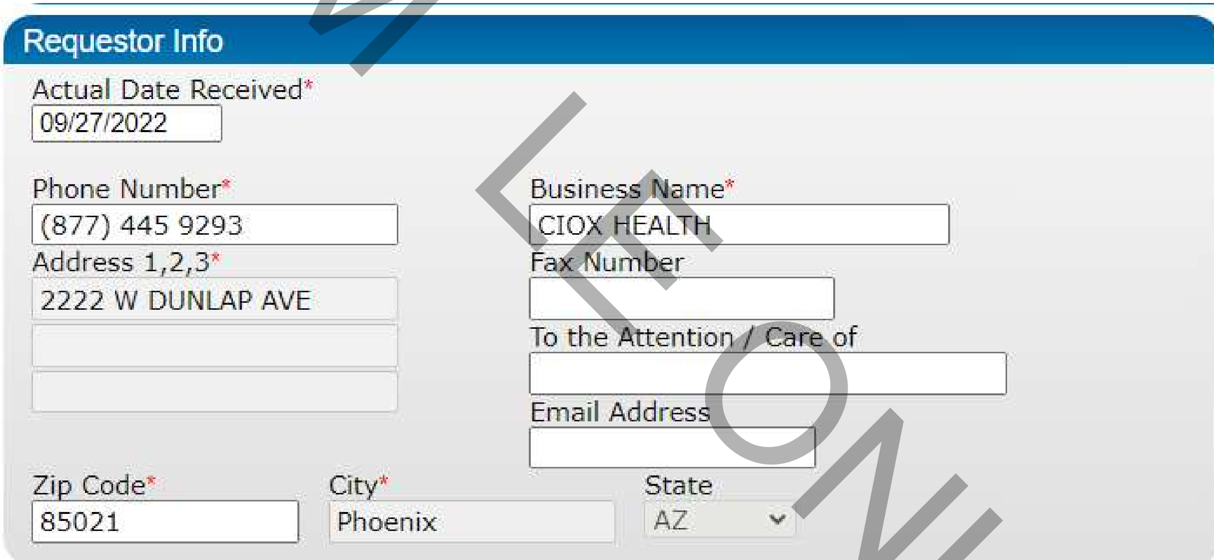


7) You will now see the Create Health Plan screen:

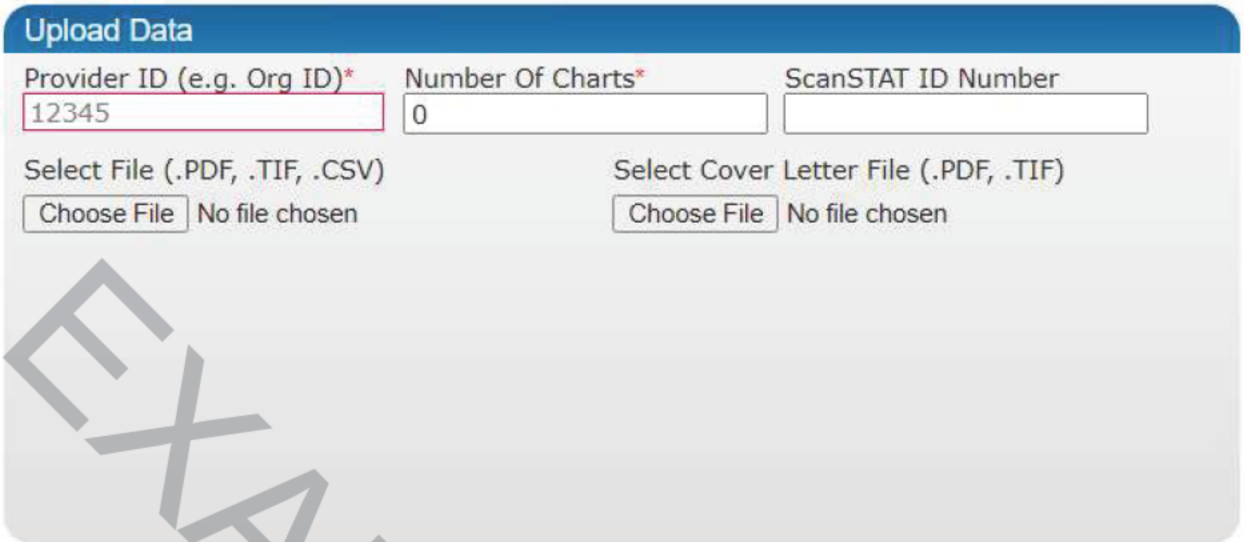


8) On the left, you will see the **Requestor Info** area, which is a similar screen to the Delivery Section in the Create Release area of [redacted] You will type in the requestor's number, click TAB (on the keyboard), and select the correct requestor. *This is the same process as what you would do in U-Control's Create Release area.*

9) Please ensure all the required fields for the **Requestor Info** side are completed as instructed on on the Special Instructions popup box or on the request letter itself.



10) Next, you will see the **Upload Data** area.



11) Complete the required fields:

A) **The Provider ID (e.g., Org ID)**. This field is for the requestor's Health Plan Request internal tracking number. Instructions should be in the popup box or on the first page of the Request letter. This is a required field.

B) **Number of Charts**. This is where you enter in the number of patients listed on the Health Plan request. This is a required field.

C) [redacted] **ID Number**. This is for requests that already have a [redacted] ID or approval number from [redacted] Finance/Audit team. This is not a required field.

D) **Select File (.PDF, .TIF, .CSV)**. This first file select is for the [redacted] to upload the Health Plan request. This button will accept file types of PDF and TIF (which are the two most common types when you scan in a file using a scanner or files that are emailed) OR the CSV (Comma Separated Values or Excel-based spreadsheet file that is used sometimes for some of our Bulk Requestors). You will want to upload the file into this area.

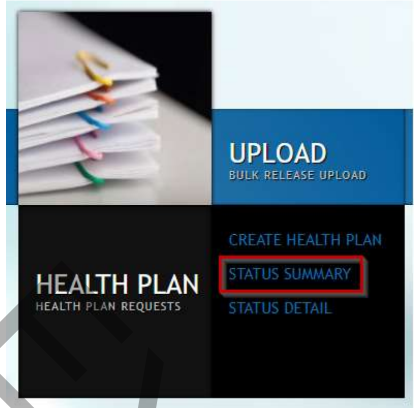
E) **Select Cover Letter File (.PDF, .TIF)**. This field is for our internal cover letter (e.g. CIOX, V tex, etc.). This should be found in [redacted]

12) Once you have completed the mandatory fields, click on the green SUBMIT button.

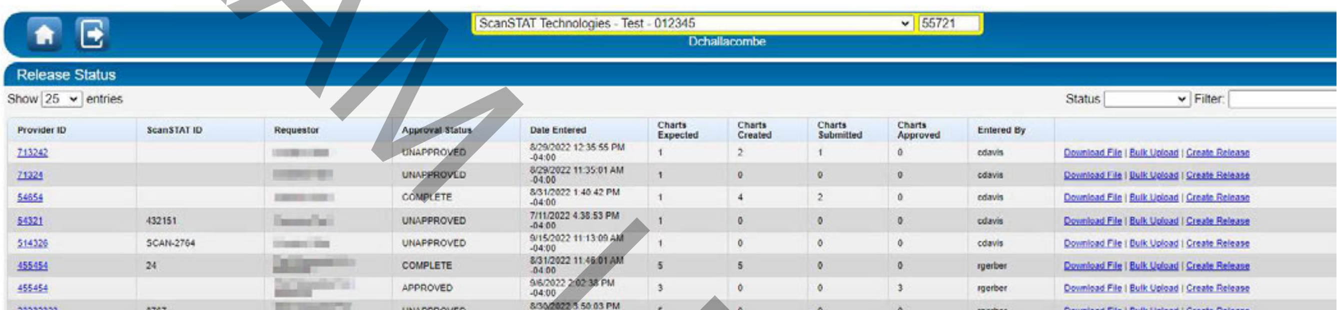
Status Summary

After you have submitted a new Health Plan Request, you will need to see if it is approved. At present, you will likely not receive an email notifying you that the request is approved. Therefore, it is important to check the Status Summary area to see.

1. From the Main Menu, click HEALTH PLAN and select STATUS SUMMARY.



2. You will see the Release Status area with a listing of the Health Plan requests and their approval status:



Provider ID	ScanSTAT ID	Requestor	Approval Status	Date Entered	Charts Expected	Charts Created	Charts Submitted	Charts Approved	Entered By	
713242		[illegible]	UNAPPROVED	8/29/2022 12:35:55 PM -04:00	1	2	1	0	cdavis	Download File | Bulk Upload | Create Release
71324		[illegible]	UNAPPROVED	8/29/2022 11:35:01 AM -04:00	1	0	0	0	cdavis	Download File | Bulk Upload | Create Release
54654		[illegible]	COMPLETE	8/31/2022 1:40:42 PM -04:00	1	4	2	0	cdavis	Download File | Bulk Upload | Create Release
54321	432151	[illegible]	UNAPPROVED	7/11/2022 4:38:53 PM -04:00	1	0	0	0	cdavis	Download File | Bulk Upload | Create Release
514326	SCAN-2764	[illegible]	UNAPPROVED	9/15/2022 11:13:09 AM -04:00	1	0	0	0	cdavis	Download File | Bulk Upload | Create Release
455454	24	[illegible]	COMPLETE	8/31/2022 11:46:01 AM -04:00	5	5	0	0	rgerber	Download File | Bulk Upload | Create Release
455454		[illegible]	APPROVED	9/6/2022 2:02:38 PM -04:00	3	0	0	3	rgerber	Download File | Bulk Upload | Create Release
23232323	8767	[illegible]	UNAPPROVED	8/30/2022 3:50:03 PM	5	0	0	0	rgerber	Download File | Bulk Upload | Create Release

For each request, you will see several columns:

A) Provider ID. This field is or the requestor's Health Plan Request internal tracking number. Instructions should be in the popup box or on the first page of the request letter.

B) [redacted] ID. This is the internal [redacted] number given to request. You may not have one showing if the request is not approved.

C) Requestor. This is the name of the requestor.

D) Approval Status. This shows if the request is approved or not. Valid choices showing should be UNAPPROVED, APPROVED, COMPLETE, and CANCELLED.

E) Date Entered. This is the date/time stamp of when the Health Plan request was entered into [redacted]

F) Charts Expected. This is the number of charts or individual ROI requests that were originally listed on the Health Plan request.

G) Charts Created. This is the number of charts or individual ROI requests that have been created to date for this specific Health Plan request.

H) Charts Submitted. This is the number of charts or individual ROI requests that have been submitted for this specific Health Plan request.

I) Charts Approved. This is the number of charts or individual ROI requests that the requestor approved for [redacted] to fulfill for this specific Health Plan request. This may be the same

number as the Charts Expected, or it may be higher or lower, depending on what the Finance/Audit team gets approved from the requestor.
J) Entered By. This field shows the name of the [redacted] user who entered the Health Plan request.

The final column has several hyperlinks:

A) Download File. This link will allow you to download the Health Plan request file. This is usually in CSV but could also be in PDF or TIF.
B) Bulk Upload. This file is similar to the Auto-Upload button on [redacted] This will take you to a screen to auto upload the CSV file to create the individual ROI requests or charts.
C) Create Release. This button will allow you to create individual ROI requests or charts using the Requestor information in the Health Plan request area. Usually, you will not click this button unless there is a request with one patient. Otherwise, you will follow the instructions for uploading the file/etc.

3. Review the list of Health Plan requests to determine if any are approved and ready to be completed.

4. Please note: The Finance/Audit team will also add the CSV file for approved requests into the respective Sharepoint team folder. The Manager or [redacted] should check the Sharepoint team folder for the approved requests CSV.

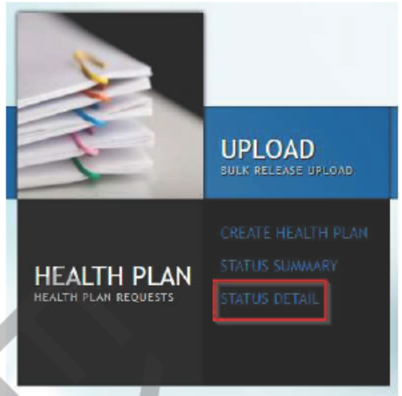
5. The Manager or [redacted] should monitor submitted approvals daily. If the request is showing as being approved, then the Manager should check the Sharepoint folder for the CSV file.

6. The [redacted] will then need to follow a similar process under Upload to bulk upload the CSV file to [redacted] HOWEVER, the [redacted] should ensure they are using the BULK UPLOAD button in STATUS SUMMARY section to create the bulk upload

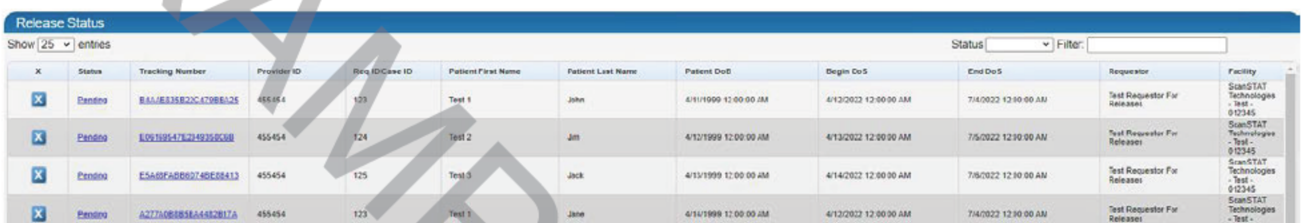
Status Detail

For approved Health Plan requests, you will need to actually complete the request. Similar to the process that exists for the Upload area, the system allows you to create shells of the individual ROI releases and put them in a Saved or Pending status. Different, if you use the Health Plan request, these shells will appear under the Health Plan Status Detail AND also under the STATUS area (from the main menu).

1. From the Main Menu, click HEALTH PLAN and select STATUS DETAIL.



2. On the Status Detail screen, you will see the individual ROI requests or charts created for the Health Plan requests.



3. Similar to STATUS, you can access the individual ROI requests here or in the STATUS area. However, this area will only show those requests connected to the Health Plan requests.

Health Plan: Requesting Approval for Audits

For most Health Plan Requests, HEDIS or MRA Audits, [redacted] have been required seek approval from the Finance Department/Audit team *prior to* pulling records. This process will continue, however, the process to seek this approval is changing. Previously, [redacted] would need to email the request to a certain person or email address. Now, [redacted] can use the Health Plan area to seek approval.

NOTE: This is just for requests received at the facility. The process for Health Plan requests that are received to the corporate Finance/Audit team will continue with the process described in Upload.

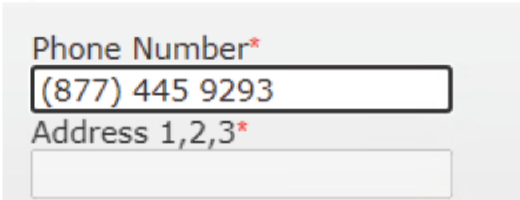
Create Health Plan

Imagine you review a new Health Plan request. If you already know that you need to seek approval, then you can start with Step 1 and skip to Step 6. Otherwise, start with Step 1 and continue.

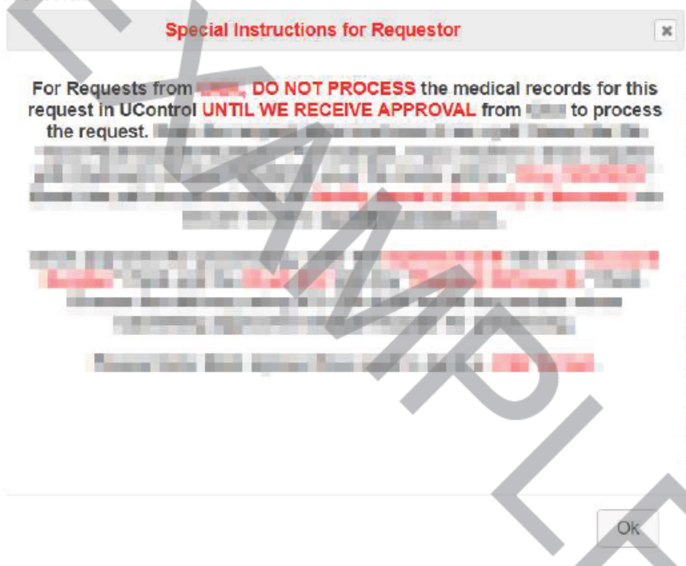
13) Log into [redacted] and select the correct facility.

14) Click on RELEASE and select CREATE.

15) Enter the phone number for the requestor in the PHONE NUMBER field, then click on TAB (on the keyboard).

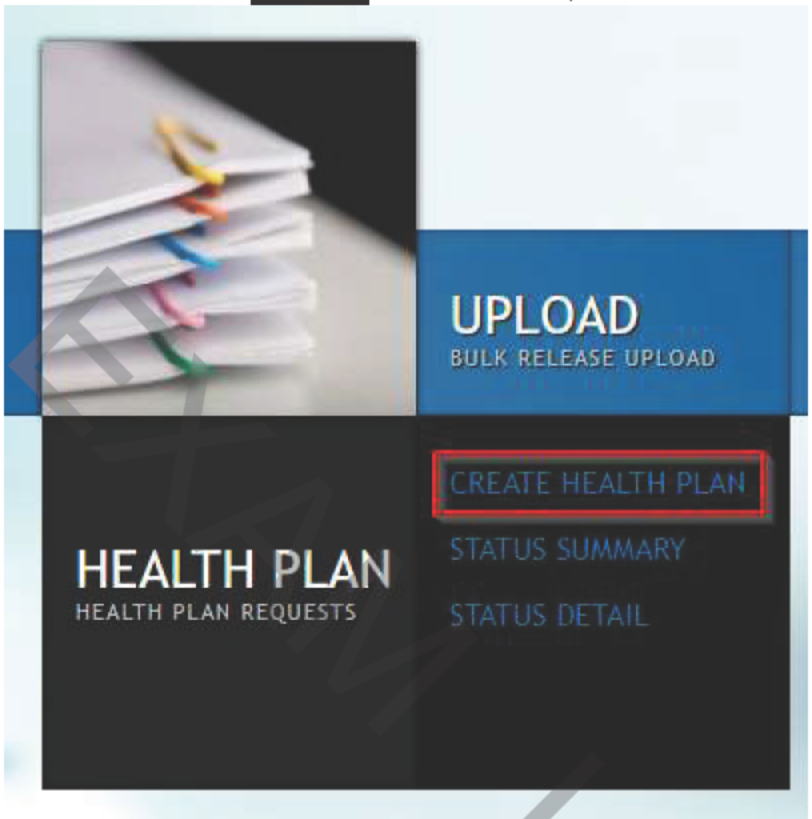


16) Review the pop-up and follow the instructions. **IF no instructions, then process the request as normal**



17) If the instructions require you to seek approval prior to processing, click on the trashcan icon to delete this release and go back to the Main Menu.

18) Next, hover over the [redacted] HEALTH PLAN option then CREATE HEALTH PLAN.



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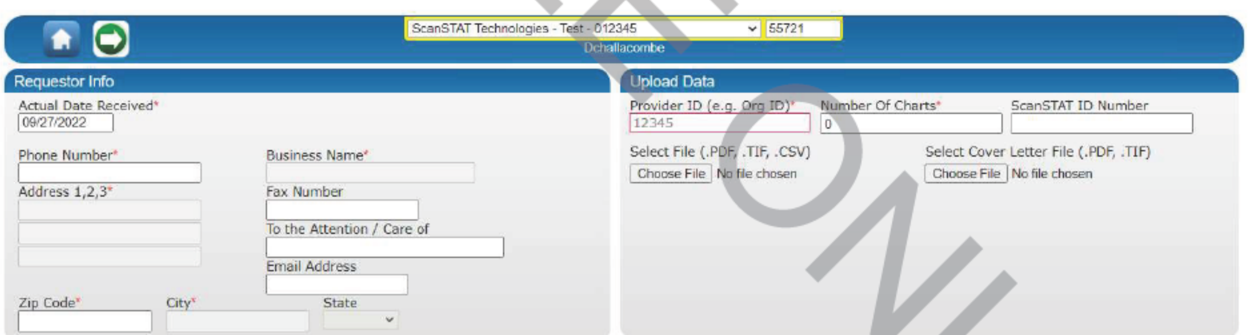
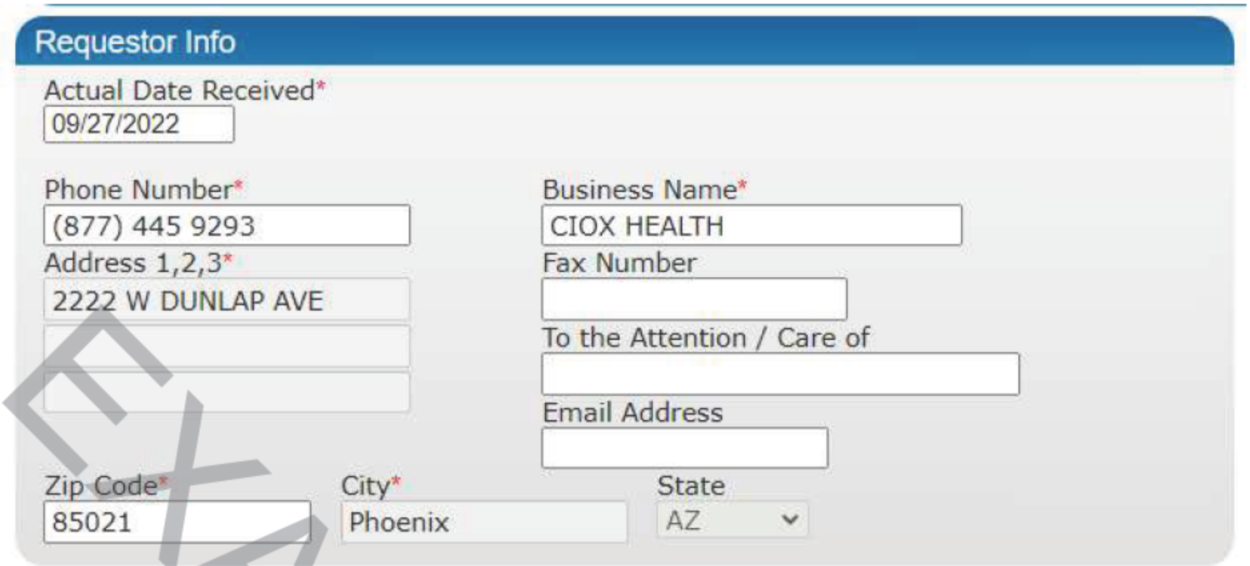
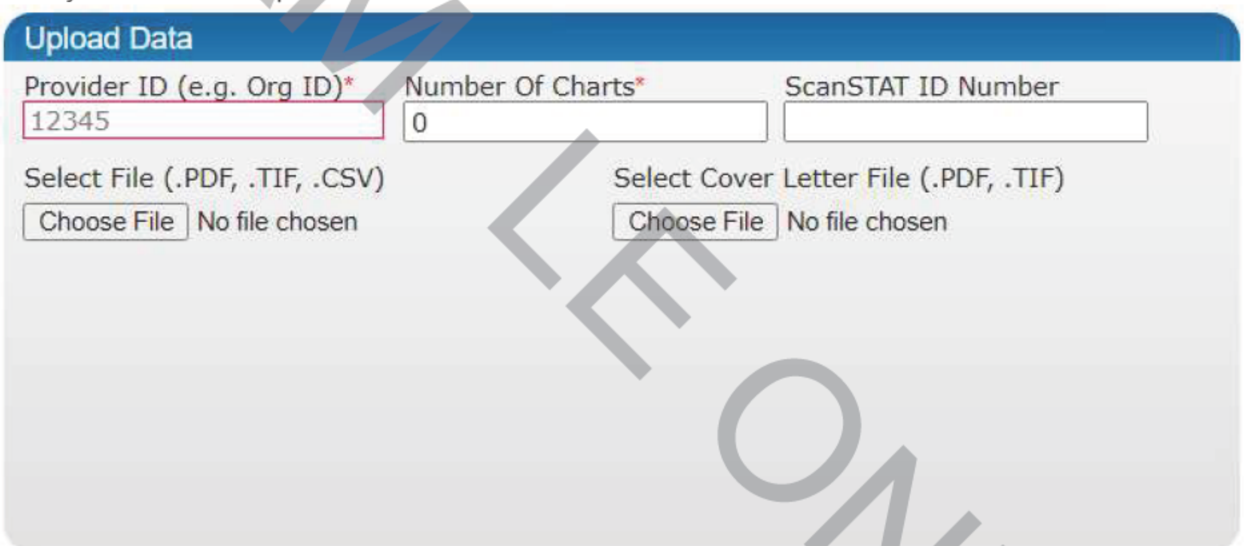


20) On the left, you will see the **Requestor Info** area, which is a similar screen to the Delivery Section in the Create Release area of [redacted] You will type in the requestor's number, click TAB (on the keyboard), and select the correct requestor. *This is the same process as what you would do in U-Control's Create Release area.*

21) Please ensure all the required fields for the **Requestor Info** side are completed as instructed on on the Special Instructions popup box or on the request letter itself.



22) Next, you will see the **Upload Data** area.



23) Complete the required fields:

A) **The Provider ID (e.g., Org ID)**. This field is or the requestor's Health Plan Request internal tracking number. Instructions should be in the popup box or on the first page of the Request letter. This is a required field.

B) **Number of Charts**. This is where you enter in the number of patients listed on the Health Plan request. This is a required field.

C) [redacted] **ID Number**. This is for requests that already have a [redacted] ID or approval number from [redacted] Finance/Audit team. This is not a required field.

D) **Select File (.PDF, .TIF, .CSV)**. This first file select is for the [redacted] to upload the Health Plan request. This button will accept file types of PDF and TIF (which are the two most common types when you scan in a file using a scanner or files that are emailed) OR the CSV (Comma Separated Values or Excel-based spreadsheet file that is used sometimes for some of our Bulk Requestors). You will want to upload the file into this area.

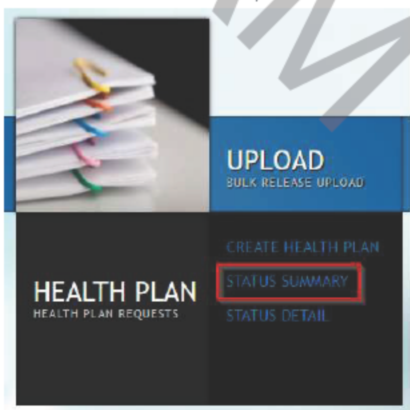
E) **Select Cover Letter File (.PDF, .TIF)**. This field is for our internal cover letter (e.g., CIOX, Virtex, etc.). This should be found in Sharepoint.

24) Once you have completed the mandatory fields, click on the green SUBMIT button.

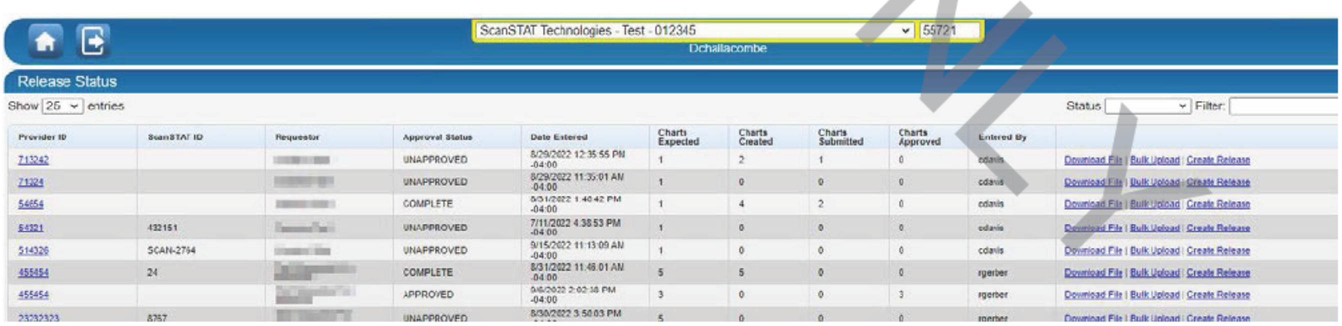
Status Summary

After you have submitted a new Health Plan Request, you will need to see if it is approved. At present, you will likely not receive an email notifying you that the request is approved. Therefore, it is important to check the Status Summary area to see.

7. From the Main Menu, click HEALTH PLAN and select STATUS SUMMARY.



8. You will see the Release Status area with a listing of the Health Plan requests and their approval status:



Provider ID	ScanSTAT ID	Requestor	Approval Status	Date Entered	Charts Expected	Charts Created	Charts Submitted	Charts Approved	Entered By	
713242		[illegible]	UNAPPROVED	8/29/2022 12:35:55 PM -04:00	1	2	1	0	cdavis	Download File | Bulk Upload | Create Release
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54654		[illegible]	COMPLETE	8/31/2022 1:40:42 PM -04:00	1	4	2	0	cdavis	Download File | Bulk Upload | Create Release
54321	432151	[illegible]	UNAPPROVED	7/11/2022 4:38:53 PM -04:00	1	0	0	0	cdavis	Download File | Bulk Upload | Create Release
514326	SCAN-2794	[illegible]	UNAPPROVED	9/15/2022 11:13:09 AM -04:00	1	0	0	0	cdavis	Download File | Bulk Upload | Create Release
455454	24	[illegible]	COMPLETE	8/31/2022 11:46:01 AM -04:00	5	5	0	0	rgerber	Download File | Bulk Upload | Create Release
455454		[illegible]	APPROVED	9/6/2022 2:02:38 PM -04:00	3	0	0	3	rgerber	Download File | Bulk Upload | Create Release
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A) **Provider ID**. This field is or the requestor's Health Plan Request internal tracking number.

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F) **Charts Expected**. This is the number of charts or individual ROI requests that were originally listed on the Health Plan request.

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J) **Entered By**. This field shows the name of the [redacted] user who entered the Health Plan request.

The final column has several hyperlinks:

Download File | Bulk Upload | Create Release

Download File | Bulk Upload | Create Release

A) **Download File**. This link will allow you to download the Health Plan request file. This is usually in CSV but could also be in PDF or TIF.

B) **Bulk Upload**. This file is similar to the Auto-Upload button on [redacted] This will take you to a screen to auto-upload the CSV file to create the individual ROI requests or charts.

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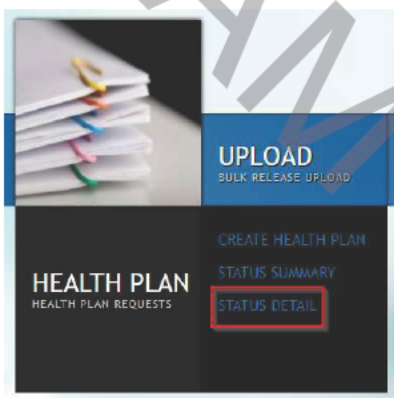
4. From the Main Menu click HEALTH PLAN and select STATUS DETAIL.



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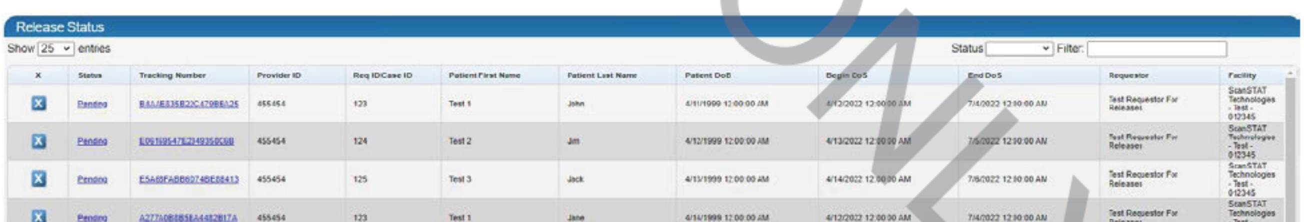

Release Status

Show 25 entries　　Status　Filter:

X	Status	Tracking Number	Provider ID	Req ID/Case ID	Patient First Name	Patient Last Name	Patient DoB	Begin DoS	End DoS	Requestor	Facility
X	Pending	B4A/E835B22C479BBA25	455454	123	Test 1	John	4/11/1999 12:00:00 AM	4/12/2022 12:00:00 AM	7/4/2022 12:00:00 AM	Test Requestor For Releases	ScanSTAT Technologies - Test - 012345
X	Pending	E06169547E2349350C3B	455454	124	Test 2	Jim	4/12/1999 12:00:00 AM	4/13/2022 12:00:00 AM	7/5/2022 12:00:00 AM	Test Requestor For Releases	ScanSTAT Technologies - Test - 012345
X	Pending	E5A8FABB6074BE88413	455454	125	Test 3	Jack	4/13/1999 12:00:00 AM	4/14/2022 12:00:00 AM	7/6/2022 12:00:00 AM	Test Requestor For Releases	ScanSTAT Technologies - Test - 012345
X	Pending	A277A0B8B5EA4482B17A	455454	123	Test 1	Jane	4/14/1999 12:00:00 AM	4/12/2022 12:00:00 AM	7/4/2022 12:00:00 AM	Test Requestor For Releases	ScanSTAT Technologies - Test -

6. Similar to STATUS, you can access the individual ROI requests here or in the STATUS area. However, this area will only show those requests connected to the Health Plan requests.