

# Provider Portal Participant Guide

---

Corporate Clinical Systems Training Department

Original Date: 01/15/2019

Updated Date: 11/01/2021

Updated By: Jessica Williams

Next Review Date: 05/01/2022

Review Cycle: Annually

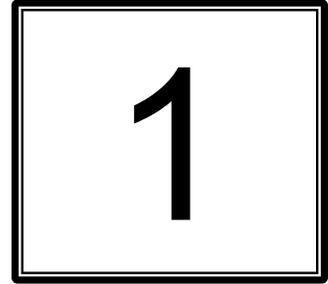
*The information contained in this training document / PowerPoint is confidential, proprietary, and only for use by the intended recipient. This training document/PowerPoint may not be copied, published, and/or redistributed without the prior written consent of AmeriHealth Caritas. Training materials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

# TABLE OF CONTENTS

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

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

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



# **1 LOGGING IN TO THE PROVIDER PORTAL**

# Logging in to Provider Portal

**Sign In**

Username:

Password:

**Sign In**

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

**Getting Started with NaviNet**

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

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

**Important Information**

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

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

**Coming This March!**

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

[Learn More...](#)

**Are You In The Loop?**

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

**Are You Sharing Login Credentials?**

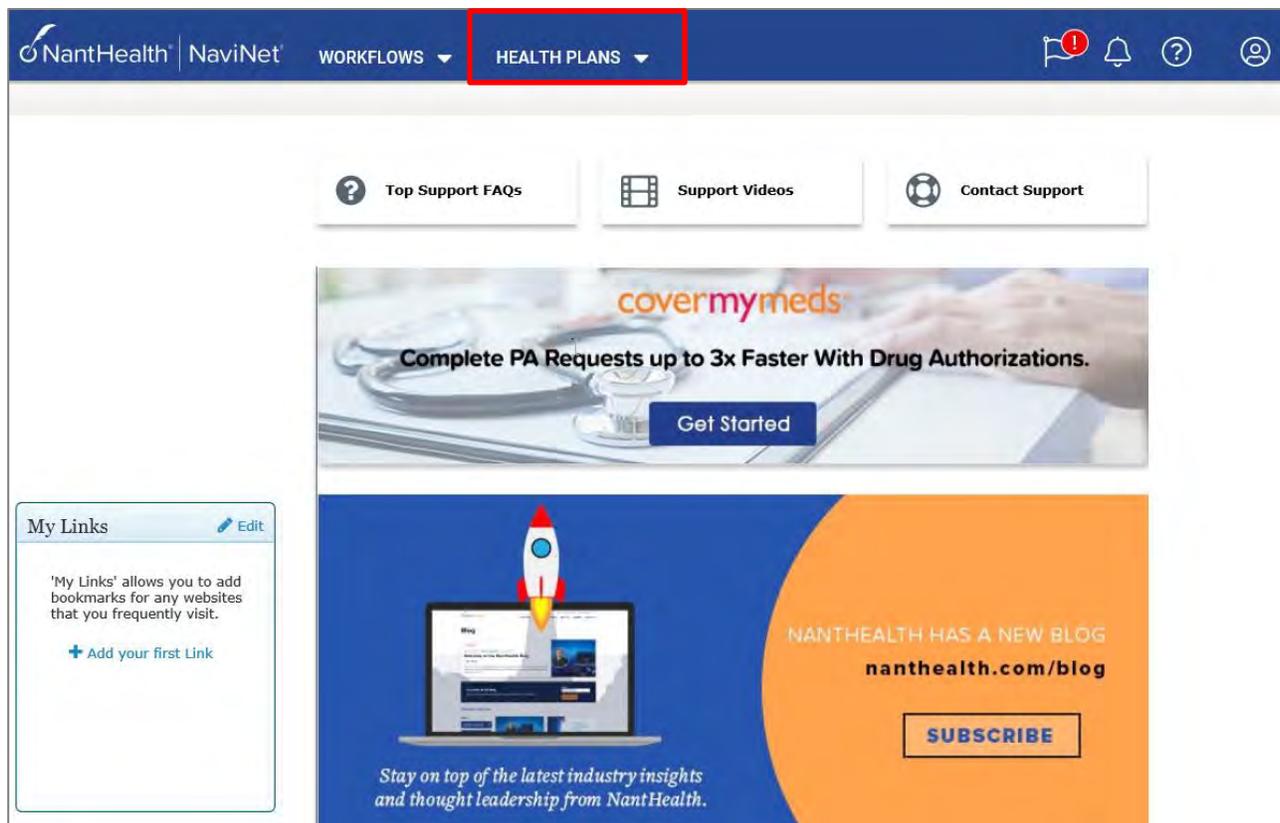
HIPAA guidelines prohibit users from sharing login information. If you are sharing login credentials, please contact your NaviNet Security Officer to be added as a user. Don't know the name of your Security Officer? Log in and go to **My Account** and click **My Security**. There is no additional charge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

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

Norton SECURED  
 powered by digicert

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

## Logging in to Provider Portal



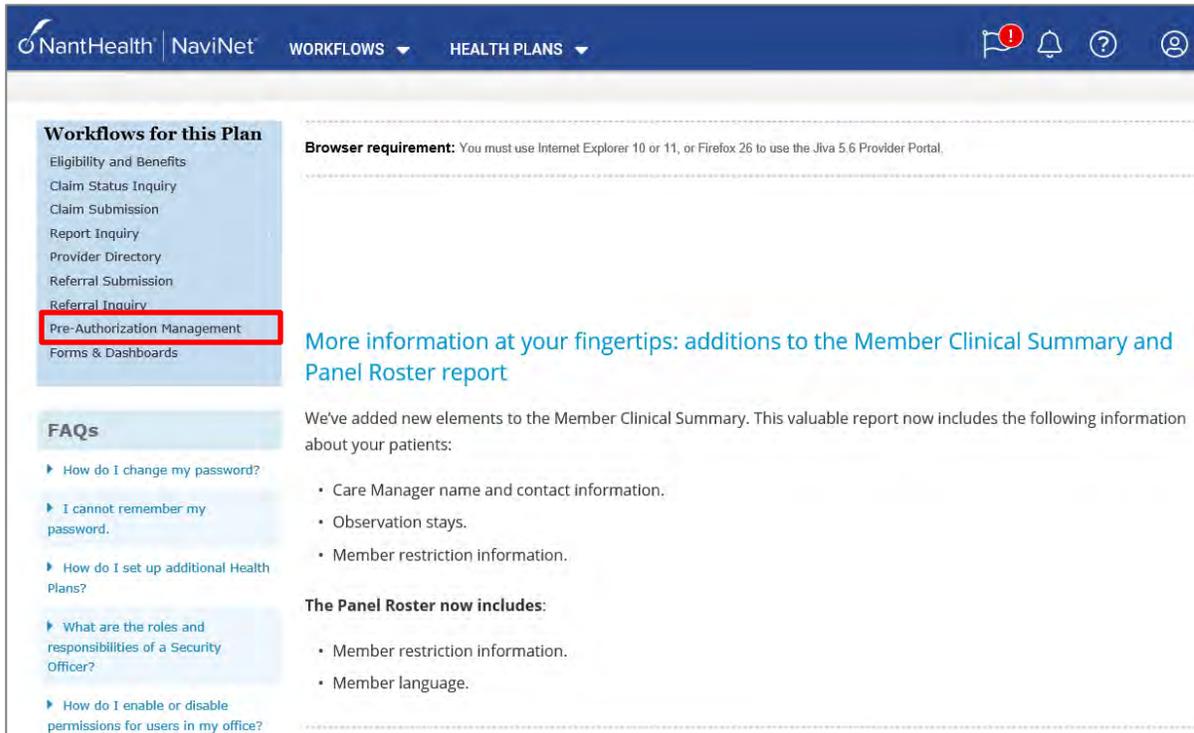
The NaviNet Home Page is not Health Plan-specific.

To locate your Health Plan:

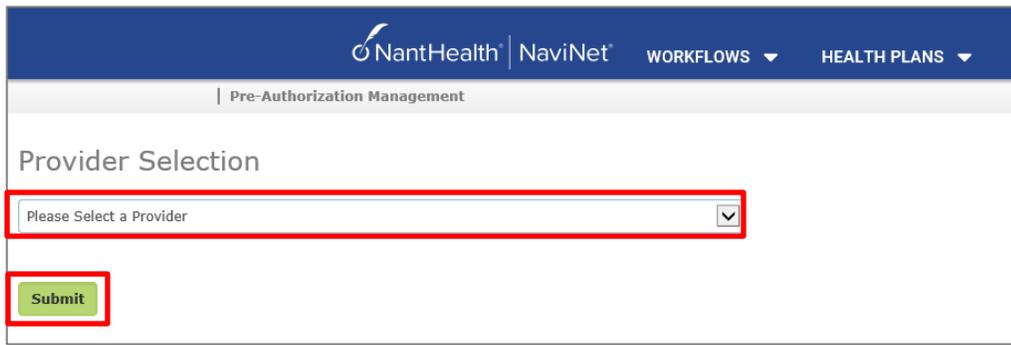
Step	Action
1.	Click on <b>HEALTHPLANS</b> in the top menu
2.	Select the appropriate <b>health plan</b> from the drop down list
	<b>Result:</b> <i>The Health Plan-specific Home page will display</i>

## Logging in to Provider Portal

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



To access the Provider Portal:

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

## Overview of the Dashboard

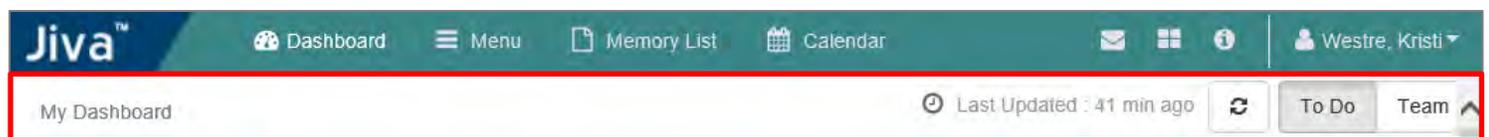
The dashboard consists of widgets (*or panels*) that help you to access the tasks that are assigned to you. It also provides high-level information about the episodes and activities assigned to you.

### Application Banner



Menu Bar	Description
<b>Dashboard</b>	Click to return to the Dashboard from anywhere within the Provider Portal.
<b>Menu</b>	Click to access ways to search for a member.
<b>Memory list</b>	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.
<b>Calendar</b>	The calendar will display any tasks that have been assigned to you.
<b>Messaging</b>	N/A – The messaging functionality will not be used.
<b>Legend</b>	Click to see a legend of icons that may be associated with members.
<b>Jiva Help</b>	Click to access help for the screen you are on.
<b>Profile</b>	Click to make changes to the color scheme.

### My Dashboard Banner



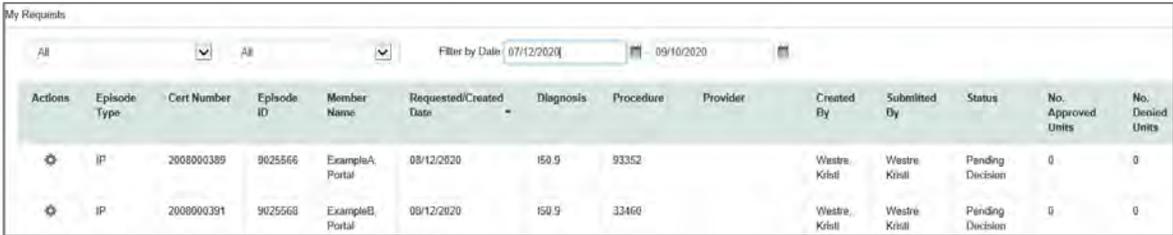
Item	Description
<b>Last Updated</b>	Displays the last time the Dashboard was updated
<b>Refresh</b>	Click the Refresh icon to update the Dashboard to view the most current information.
<b>To Do</b>	Displays the widgets containing information regarding episodes associated with you.
<b>Team</b>	Displays 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.

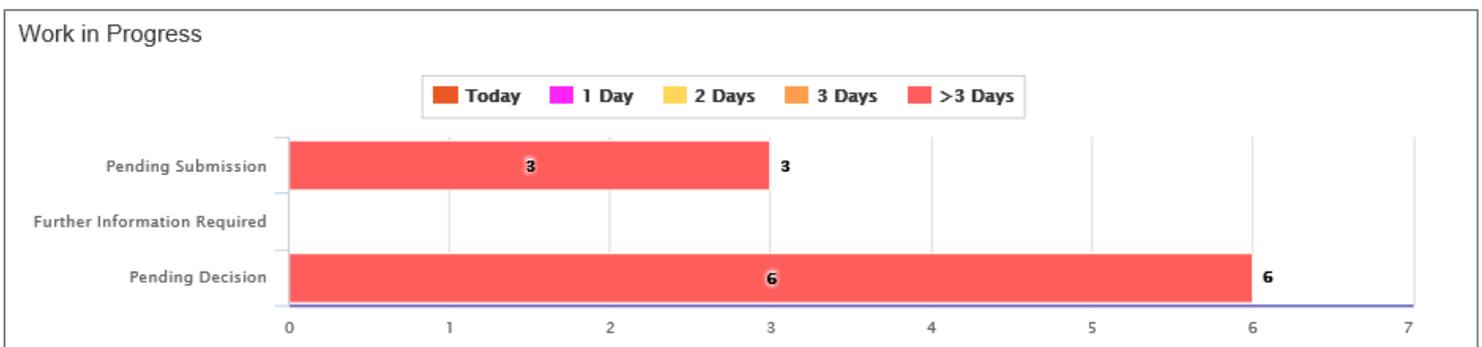
### Information Widget

 0 Alerts
 0 Messages
 7 My Requests
 0 Gaps in Care

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

### Work in Progress Widget

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



## Overview of the Dashboard: To-Do View, continued

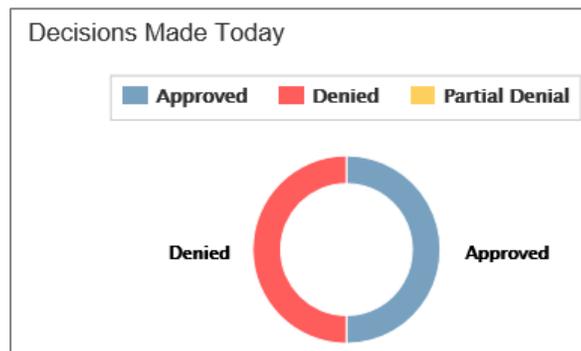
### Requests by Type Widget

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



### Decisions Made Today Widget

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



### My Activities Widget

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

## Overview of the Dashboard: Team View

The Team view will display information regarding your team.

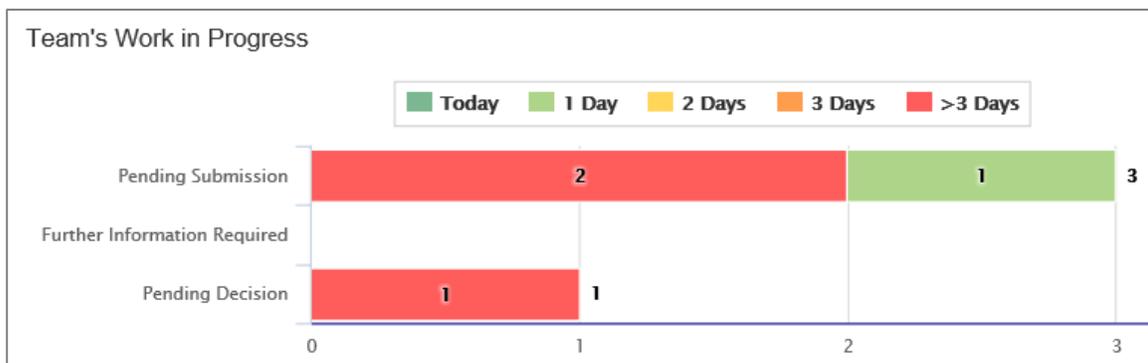
### Team Members Widget

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



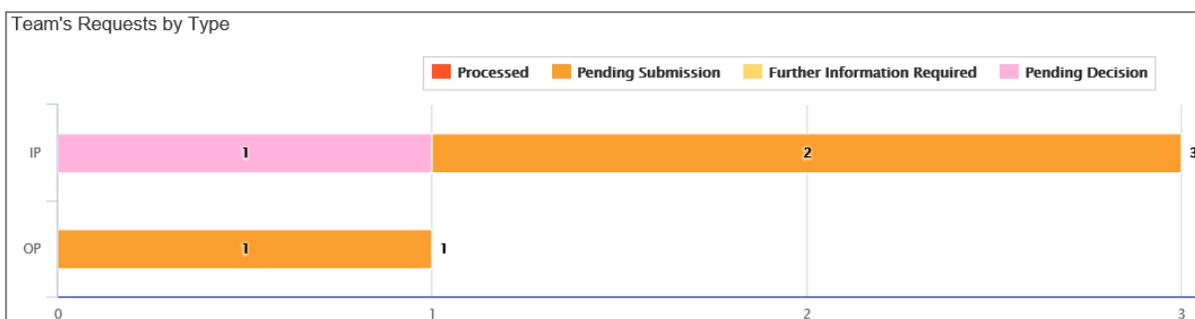
### Team's Work in Progress Widget

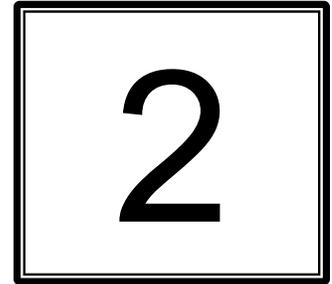
The Team's Work in Progress widget displays the number of episodes created by your team and is displayed based on the timeline.



### Team's Requests by Type Widget

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



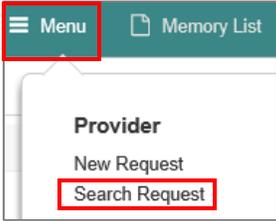


## **2 SEARCHING FOR A MEMBER**

## Searching for a Member – Search Request Tab

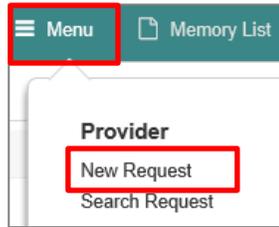
It is recommended that you search for a possible duplication before entering a request. Conducting the search using **Search Request** allows you to view existing requests for a member.

	<h3>Duplicate Case Check and Alert</h3> <ul style="list-style-type: none"> <li>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.</li> <li>Jiva will not auto approve any case that is a possible duplicate. The request will be evaluated by the Utilization Management team.</li> </ul>
---	--

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

## Searching for a Member – New Request Tab

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



Step	Action
1.	Click on <b>Menu</b> on the menu bar.
2.	Select <b>New Request</b>

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

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



## **3 ENTER AN IP CLINICAL REQUEST**

## How to Enter an Inpatient Clinical Request

---

When entering a request you have 2 options:

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

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

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

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



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

## Adding a New IP Clinical Request – Adding Episode Details

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

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

The screenshot shows the Jiva portal interface. At the top, there is a navigation bar with 'Jiva' logo and links for Dashboard, Menu, Memory List, and Calendar. Below this is a member information bar with fields for Name (ExampleA, Portal), Gender (Female), DOB (04/19/1966 (54y)), Member ID, Government ID, Address (1234 Mulberry L... IA), Phone & Email ((515) 555-5555), Coverage, Group, PCP/PCM, and Allergies. A red circle highlights a drop-down caret icon on the right side of the member information bar. Below the member information is the 'Inpatient Request' section. It features a sidebar with 'Episode Details' and a main form area. The main form area contains three required fields: 'Request Type \*' (dropdown), 'Request Priority \*' (dropdown), and 'Admit Type' (dropdown). A red circle highlights the 'Optional Fields' hyperlink located below these fields.

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

Step	Action
1.	Select the appropriate <b>Request Type</b> from the drop down
2.	Select the appropriate <b>Request Priority</b> from the drop down
3.	Select the appropriate <b>Admit Type</b> from the drop down

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

This screenshot shows the 'Inpatient Request' form with the 'Optional Fields' section expanded. The 'Request Type \*', 'Request Priority \*', and 'Admit Type' fields are visible. Below them, the 'Time Request' field (a text input) and the 'Reason for Request' field (a dropdown) are highlighted with a red box. The 'Episode Details' sidebar is also visible on the left.

- **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 \*

Diagnosis \*

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

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

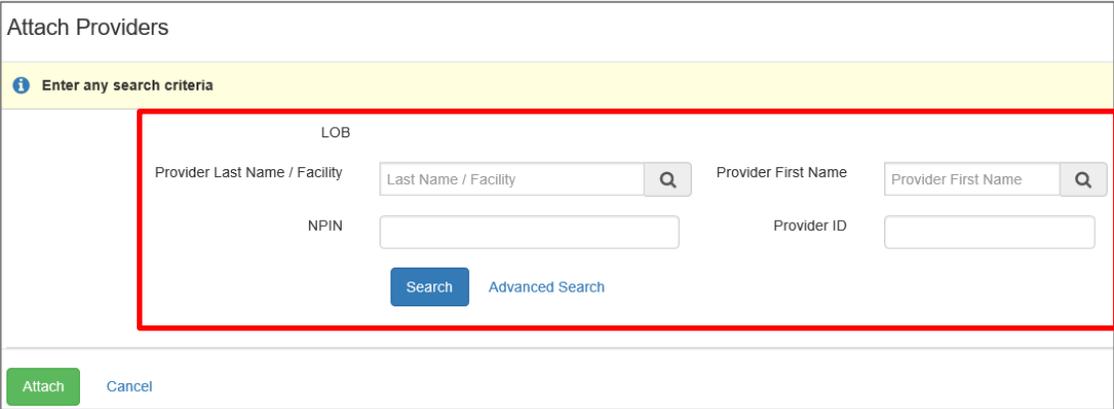
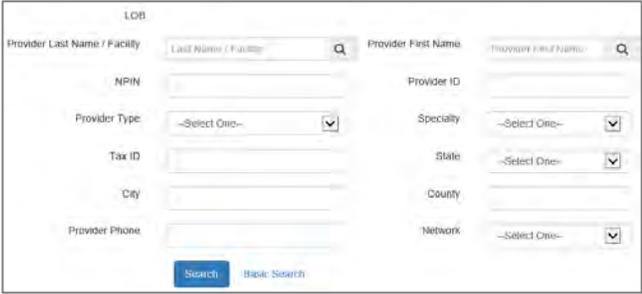
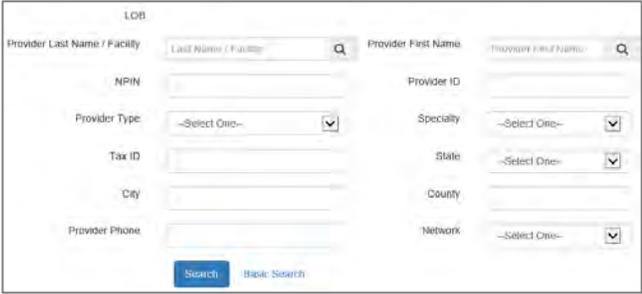
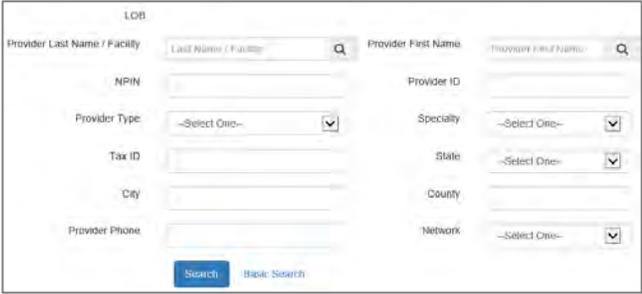
# Adding a New IP Clinical Request – Adding Providers

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.*”

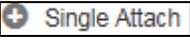
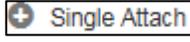
Step	Action						
1.	<p>Click the <b>Attach Providers</b> button.</p> 						
2.	<p>Enter the appropriate search criteria and click on <b>Search</b>.</p> 						
3.	<p>After clicking <b>Search</b>:</p> <table border="1" data-bbox="354 1339 1458 1864"> <thead> <tr> <th data-bbox="354 1339 712 1398">If appropriate provider...</th> <th data-bbox="712 1339 1458 1398">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="354 1398 712 1457">Is displayed</td> <td data-bbox="712 1398 1458 1457">Proceed to Step 4.</td> </tr> <tr> <td data-bbox="354 1457 712 1864"><i>Is not</i> displayed</td> <td data-bbox="712 1457 1458 1864"> <p>You may use the <b>Advanced Search</b> functionality and click the <b>Attach</b> button after locating the provider</p>  </td> </tr> </tbody> </table>	If appropriate provider...	Then...	Is displayed	Proceed to Step 4.	<i>Is not</i> displayed	<p>You may use the <b>Advanced Search</b> functionality and click the <b>Attach</b> button after locating the provider</p> 
If appropriate provider...	Then...						
Is displayed	Proceed to Step 4.						
<i>Is not</i> displayed	<p>You may use the <b>Advanced Search</b> functionality and click the <b>Attach</b> button after locating the provider</p> 						

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

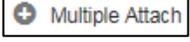
Search Results

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

Single Attach  
 Multiple Attach  
 Set as Favorite

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



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

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.

<b>Stay Request</b>	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 <b>Service Type</b> drop down.
2.	Select the most appropriate choice in the <b>Place of Service</b> drop down. <b>Note</b> - If you are uncertain, select " <b>Medical</b> ."
3.	Select the most appropriate "type of bed or unit" in which the member was admitted in the <b>Requested Level of Care</b> drop down.
4.	Enter the "date of admission" in the <b>Admit Date</b> field.
5.	Enter "1" in the <b>LOS Requested #</b> 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 <b>Service Request</b> section (<i>if applicable</i>) using the guidelines outlined below:</p> <div data-bbox="407 552 1390 968" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> </div> <table border="1" data-bbox="228 982 1560 1501"> <tr> <td><b>Service Type</b></td> <td>Defaults to Inpatient, but update as needed</td> </tr> <tr> <td><b>Place of Service</b></td> <td>Defaults to Medical, but update as needed</td> </tr> <tr> <td><b>Code Type</b></td> <td>Defaults to CPT, but update as needed</td> </tr> <tr> <td><b>Service Code</b></td> <td>Enter the requested procedure code. <b>Note:</b> 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 <b>Advanced Search</b> link to initiate a search for the procedure code.</td> </tr> <tr> <td><b>Modifier</b></td> <td>Enter modifier details as appropriate</td> </tr> <tr> <td><b>Start Date</b></td> <td>Defaults to match the Actual Admit date, update as needed</td> </tr> <tr> <td><b>End Date</b></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 <b>Optional Fields</b> hyperlink.</p> <table border="1" data-bbox="228 1549 1560 1774"> <tr> <td><b>Time Frame</b></td> <td>Defaults to 1, but update as needed</td> </tr> <tr> <td><b>Time Period</b></td> <td>Defaults to 1, but update as needed</td> </tr> <tr> <td><b>Units</b></td> <td>Defaults to 1, but update as needed</td> </tr> <tr> <td><b>UCR Cost</b></td> <td>N/A – not used</td> </tr> </table>	<b>Service Type</b>	Defaults to Inpatient, but update as needed	<b>Place of Service</b>	Defaults to Medical, but update as needed	<b>Code Type</b>	Defaults to CPT, but update as needed	<b>Service Code</b>	Enter the requested procedure code. <b>Note:</b> 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 <b>Advanced Search</b> link to initiate a search for the procedure code.	<b>Modifier</b>	Enter modifier details as appropriate	<b>Start Date</b>	Defaults to match the Actual Admit date, update as needed	<b>End Date</b>	Defaults to the next day, update as needed	<b>Time Frame</b>	Defaults to 1, but update as needed	<b>Time Period</b>	Defaults to 1, but update as needed	<b>Units</b>	Defaults to 1, but update as needed	<b>UCR Cost</b>	N/A – not used
<b>Service Type</b>	Defaults to Inpatient, but update as needed																						
<b>Place of Service</b>	Defaults to Medical, but update as needed																						
<b>Code Type</b>	Defaults to CPT, but update as needed																						
<b>Service Code</b>	Enter the requested procedure code. <b>Note:</b> 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 <b>Advanced Search</b> link to initiate a search for the procedure code.																						
<b>Modifier</b>	Enter modifier details as appropriate																						
<b>Start Date</b>	Defaults to match the Actual Admit date, update as needed																						
<b>End Date</b>	Defaults to the next day, update as needed																						
<b>Time Frame</b>	Defaults to 1, but update as needed																						
<b>Time Period</b>	Defaults to 1, but update as needed																						
<b>Units</b>	Defaults to 1, but update as needed																						
<b>UCR Cost</b>	N/A – not used																						

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

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

# Adding a New IP Clinical Request – InterQual

Access and complete InterQual Connect Clinical Criteria



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

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

Step	Action																																				
1.	<p>Click the <b>Check for Review</b> button.</p> 																																				
2.	<p>Once determined that one or both exists, you will receive the following pop-up message. Click <b>OK</b>.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>pr-jv6-ap-pp.amerihealthcaritas.com says</p> <p>There are stay/service lines to be reviewed. Kindly complete the same before submit.</p> <p style="text-align: right;"><b>OK</b></p> </div>																																				
3.	<p>Click the appropriate <b>Go to Criteria</b> button.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">If...</th> <th style="width: 50%;">Then...</th> </tr> </thead> <tbody> <tr> <td>Only a <b>Stay Request</b></td> <td> <ul style="list-style-type: none"> <li>Click the <b>Go to Criteria</b> button associated with the <b>Stay Request</b>.</li> </ul> </td> </tr> <tr> <td>Both <b>Stay</b> and <b>Service Requests</b></td> <td> <ul style="list-style-type: none"> <li>The <b>Go to Criteria</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Go to Criteria</b> button associated with the <b>Service Request</b>.</li> </ul> </td> </tr> </tbody> </table> <div style="margin-top: 10px;"> <p><b>Stay Request</b></p> <table style="width: 100%;"> <tr> <td>Treatment Setting *</td> <td>Hospital - Inpatient</td> <td>Actual Admit Date</td> <td>10/12/2021</td> </tr> <tr> <td>Treatment Type</td> <td>Medical</td> <td>LOS Requested</td> <td>1</td> </tr> <tr> <td>Requested Level Of Care</td> <td>Medical</td> <td>Review Status</td> <td></td> </tr> </table> <p style="text-align: center;"><b>Go to Criteria</b></p> </div> <div style="margin-top: 10px;"> <p><b>Service Request</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Action</th> <th>Service Code</th> <th>Modifier</th> <th>Requested#</th> <th>Start Date</th> <th>End Date</th> <th>Treatment Setting</th> <th>Treatment Type</th> <th>Review Status</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>50280(CPT)</td> <td></td> <td>1</td> <td>10/15/2021</td> <td>11/15/2021</td> <td>Hospital - Inpatient</td> <td>Medical</td> <td></td> </tr> </tbody> </table> </div>	If...	Then...	Only a <b>Stay Request</b>	<ul style="list-style-type: none"> <li>Click the <b>Go to Criteria</b> button associated with the <b>Stay Request</b>.</li> </ul>	Both <b>Stay</b> and <b>Service Requests</b>	<ul style="list-style-type: none"> <li>The <b>Go to Criteria</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Go to Criteria</b> button associated with the <b>Service Request</b>.</li> </ul>	Treatment Setting *	Hospital - Inpatient	Actual Admit Date	10/12/2021	Treatment Type	Medical	LOS Requested	1	Requested Level Of Care	Medical	Review Status		Action	Service Code	Modifier	Requested#	Start Date	End Date	Treatment Setting	Treatment Type	Review Status	<input checked="" type="checkbox"/>	50280(CPT)		1	10/15/2021	11/15/2021	Hospital - Inpatient	Medical	
If...	Then...																																				
Only a <b>Stay Request</b>	<ul style="list-style-type: none"> <li>Click the <b>Go to Criteria</b> button associated with the <b>Stay Request</b>.</li> </ul>																																				
Both <b>Stay</b> and <b>Service Requests</b>	<ul style="list-style-type: none"> <li>The <b>Go to Criteria</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Go to Criteria</b> button associated with the <b>Service Request</b>.</li> </ul>																																				
Treatment Setting *	Hospital - Inpatient	Actual Admit Date	10/12/2021																																		
Treatment Type	Medical	LOS Requested	1																																		
Requested Level Of Care	Medical	Review Status																																			
Action	Service Code	Modifier	Requested#	Start Date	End Date	Treatment Setting	Treatment Type	Review Status																													
<input checked="" type="checkbox"/>	50280(CPT)		1	10/15/2021	11/15/2021	Hospital - Inpatient	Medical																														

## Adding a New IP Clinical Request – InterQual, cont.

Step	Action						
4.	<p>You will receive the following message. Click <b>OK</b> <u>only</u> if you completed the items listed.</p> <div data-bbox="245 310 1086 642" style="border: 1px solid black; padding: 10px;"> <p>pr-jv6-ap-pp.amerihealthcaritas.com says</p> <p>Click OK only after all diagnoses, stay and/or service detail lines are completed. Edits are not permitted after clicking OK. Click Cancel to edit or OK to continue.</p> <div style="text-align: right;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </div> </div>						
5.	<p>The system will connect with InterQual and determine if there is a matching guideline.</p> <table border="1" data-bbox="240 758 1544 1495"> <thead> <tr> <th data-bbox="240 758 581 800">If there is...</th> <th data-bbox="581 758 1544 800">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 800 581 1171"> <p><b>Matching Guideline</b></p> </td> <td data-bbox="581 800 1544 1171"> <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <b>Proceed to Step 6 in this section.</b></p> <div data-bbox="597 890 1240 1167" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="I50.9, G0493"/></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A  <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div> </td> </tr> <tr> <td data-bbox="240 1171 581 1495"> <p><b>No Matching Guideline</b></p> </td> <td data-bbox="581 1171 1544 1495"> <p>You will receive this pop-up. Click <b>OK</b> to close the window and you will be returned to the request screen. <b>Proceed to Adding Documents.</b></p> <div data-bbox="597 1262 1248 1488" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="J40"/></p> <p>Guideline : No matching guideline was found.</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div> </td> </tr> </tbody> </table>	If there is...	Then...	<p><b>Matching Guideline</b></p>	<p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <b>Proceed to Step 6 in this section.</b></p> <div data-bbox="597 890 1240 1167" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="I50.9, G0493"/></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A  <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div>	<p><b>No Matching Guideline</b></p>	<p>You will receive this pop-up. Click <b>OK</b> to close the window and you will be returned to the request screen. <b>Proceed to Adding Documents.</b></p> <div data-bbox="597 1262 1248 1488" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="J40"/></p> <p>Guideline : No matching guideline was found.</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div>
If there is...	Then...						
<p><b>Matching Guideline</b></p>	<p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <b>Proceed to Step 6 in this section.</b></p> <div data-bbox="597 890 1240 1167" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="I50.9, G0493"/></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A  <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div>						
<p><b>No Matching Guideline</b></p>	<p>You will receive this pop-up. Click <b>OK</b> to close the window and you will be returned to the request screen. <b>Proceed to Adding Documents.</b></p> <div data-bbox="597 1262 1248 1488" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="J40"/></p> <p>Guideline : No matching guideline was found.</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div>						

## Adding a New IP Clinical Request – InterQual, cont.

---

Step	Action						
6.	After answering the review questions, the Recommendations page will display either <b>Criteria Met</b> or <b>Criteria Not Met</b> .						
7.	From the <b>Recommendations</b> page: <table border="1" data-bbox="240 420 1554 590"> <thead> <tr> <th data-bbox="240 420 440 464">If you click...</th> <th data-bbox="440 420 1554 464">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 464 440 508"><b>Save</b></td> <td data-bbox="440 464 1554 508">The review will be saved and can be updated, if needed, prior to submitting the request.</td> </tr> <tr> <td data-bbox="240 508 440 590"><b>Complete</b></td> <td data-bbox="440 508 1554 590">The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td> </tr> </tbody> </table>	If you click...	Then...	<b>Save</b>	The review will be saved and can be updated, if needed, prior to submitting the request.	<b>Complete</b>	The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.
If you click...	Then...						
<b>Save</b>	The review will be saved and can be updated, if needed, prior to submitting the request.						
<b>Complete</b>	The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.						
8.	Close the InterQual tab to return to the Provider Portal						
9.	The request line will now display a status in the <b>Decision</b> column.						

## Adding a New IP Clinical Request – Adding Assessments

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

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

Step	Action												
1.	<p>Complete the following:</p> <ol style="list-style-type: none"><li><b>Document Title:</b> enter the title of the document</li><li><b>Document Type:</b> defaults to <b>Medical Document</b>, update as needed.</li><li><b>Document Description:</b> optional field</li><li>Click the <b>Browse</b> button to search for the document you wish to upload<ol style="list-style-type: none"><li>Click the desired document and click the <b>Open</b> button</li></ol></li><li>You will see the document name listed next to the <b>Browse</b> button.</li><li>You may add additional documents by selecting <b>Add</b>.</li><li>Select <b>Done</b> when you have added all documents you wish to attach.</li></ol> <div data-bbox="289 743 1494 1260"><p><b>Add Documents</b></p><p>Document Title * <input type="text" value="Additional Clinical Information"/></p><p>Document Type <input type="text" value="Medical Document"/></p><p>Document Description <input type="text" value="Allows 5000 characters only"/></p><p>Select Document * <input type="button" value="Browse"/> Document 2- for upload.docx</p><p><input type="button" value="Add"/></p><p><b>Selected Files</b></p><table border="1"><thead><tr><th></th><th>Document Title</th><th>Type</th><th>Date Added</th><th>Added User</th><th>Description</th></tr></thead><tbody><tr><td>⊖</td><td>Clinical Information</td><td>Medical Document</td><td>10/13/2021</td><td>Williams, Jessica</td><td></td></tr></tbody></table><p><input type="button" value="Done"/></p></div>		Document Title	Type	Date Added	Added User	Description	⊖	Clinical Information	Medical Document	10/13/2021	Williams, Jessica	
	Document Title	Type	Date Added	Added User	Description								
⊖	Clinical Information	Medical Document	10/13/2021	Williams, Jessica									

## 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

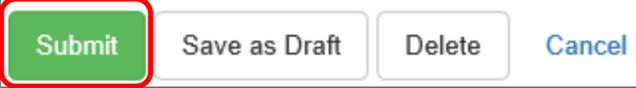
Step	Action
1.	Select the appropriate <b>Note Type</b> from the drop-down menu.
2.	Enter the appropriate notes in the notes section. Be sure to include your <b>name</b> and <b>contact information</b> in the event the Plan needs to contact you.



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 <b>Submit</b> button to submit your request.</p>  <p><b>Note:</b> The <b>Submit</b> 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><b>Note:</b> If the request is programmed to auto-approve, you will see <b>Approved</b> in the <b>Decision</b> column.</p>

Request Details

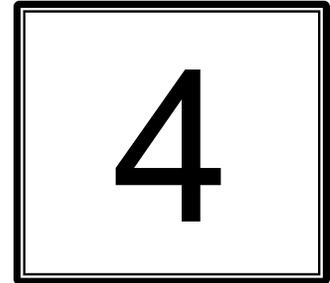
Episode Abstract

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

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

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



## **4 ENTER AN IP NON-CLINICAL REQUEST**

## How to Enter an Inpatient Non-Clinical Request

---

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

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

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

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

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

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

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

The screenshot shows the Jiva portal interface. At the top, there's a navigation bar with 'Dashboard', 'Menu', 'Memory List', and 'Calendar'. Below that, member information is displayed: 'ExampleA, Portal (Female)', 'DOB: 04/19/1966 (54y)', 'Member ID:', and 'Government Id:'. Further down, there are fields for 'Address: 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 member information bar. Below this, the 'Inpatient Request' form is shown. The 'Episode Details' section is highlighted with a red box. It contains three required fields: 'Request Type \*', 'Request Priority \*', and 'Admit Type', each with a drop-down menu. A red circle highlights the 'Optional Fields' link below these fields.

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

Step	Action
1.	Select the appropriate <b>Request Type</b> from the drop down
2.	Select the appropriate <b>Request Priority</b> from the drop down
3.	Select the appropriate <b>Admit Type</b> from the drop down

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

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

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

## Adding a New IP Non-Clinical Request – Adding Diagnosis

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

i **Diagnosis**

Code Type \*

Diagnosis \*

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

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

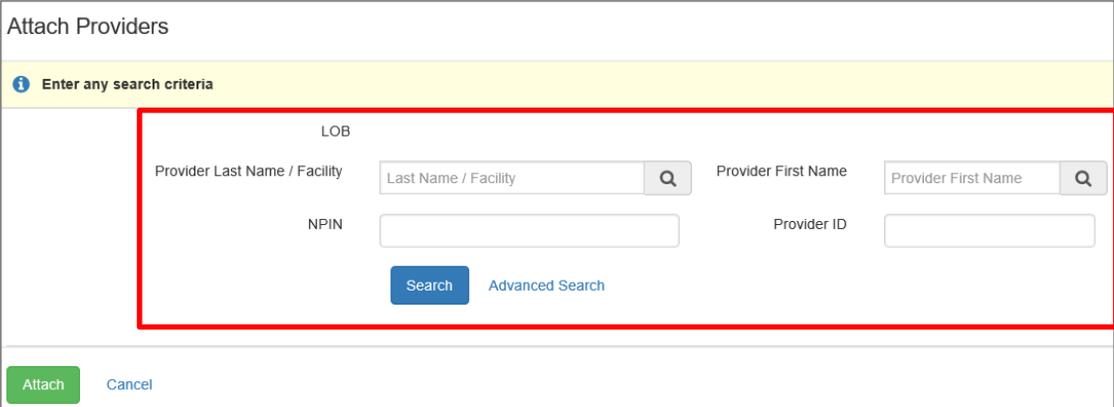
## Adding a New IP Non-Clinical Request – Adding Providers

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.*”

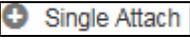
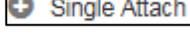
Step	Action						
1.	<p>Click the <b>Attach Providers</b> button.</p> 						
2.	<p>Enter the appropriate search criteria and click on <b>Search</b>.</p> 						
3.	<p>After clicking <b>Search</b>:</p> <table border="1" data-bbox="355 1318 1463 1843"> <thead> <tr> <th data-bbox="355 1318 712 1381">If appropriate provider...</th> <th data-bbox="712 1318 1463 1381">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="355 1381 712 1440">Is displayed</td> <td data-bbox="712 1381 1463 1440">Click the <b>Attach</b> button</td> </tr> <tr> <td data-bbox="355 1440 712 1843"><i>Is not</i> displayed</td> <td data-bbox="712 1440 1463 1843"> <p>You may use the <b>Advanced Search</b> functionality and click the <b>Attach</b> button after locating the provider</p>  </td> </tr> </tbody> </table>	If appropriate provider...	Then...	Is displayed	Click the <b>Attach</b> button	<i>Is not</i> displayed	<p>You may use the <b>Advanced Search</b> functionality and click the <b>Attach</b> button after locating the provider</p> 
If appropriate provider...	Then...						
Is displayed	Click the <b>Attach</b> button						
<i>Is not</i> displayed	<p>You may use the <b>Advanced Search</b> functionality and click the <b>Attach</b> button after locating the provider</p> 						

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

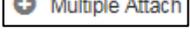
Search Results

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

Single Attach  
 Multiple Attach  
 Set as Favorite

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



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

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.

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

Step	Action
1.	Select the most appropriate choice in the <b>Service Type</b> drop down.
2.	Select the most appropriate choice in the <b>Place of Service</b> drop down. <b>Note</b> - If you are uncertain, select " <b>Medical</b> ."
3.	Select the most appropriate "type of bed or unit" in which the member was admitted in the <b>Requested Level of Care</b> drop down.
4.	Enter the "date of admission" in the <b>Admit Date</b> field.
5.	Enter "1" in the <b>LOS Requested #</b> 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 <b>Service Request</b> section (<i>if applicable</i>) using the guidelines outlined below:</p> <div data-bbox="404 569 1380 987" data-label="Form"> <p>The screenshot shows a 'Service Request' form with the following fields: Service Type (Inpatient), Place of Service (Medical), Code Type (CPT), Service Code (Search: Service Code), Modifier (Search Modifier), Start Date (08/12/2020), End Date (08/13/2020), UCR Cost (\$), Units (1), Time Frame (Per Day), Time period (1), and Requested # (1). There are links for 'Advanced Search' and 'Favorite Services', and a red box highlights the 'Optional Fields' link.</p> </div> <table border="1"> <tr> <td><b>Service Type</b></td> <td>Defaults to Inpatient, but update as needed</td> </tr> <tr> <td><b>Place of Service</b></td> <td>Defaults to Medical, but update as needed</td> </tr> <tr> <td><b>Code Type</b></td> <td>Defaults to CPT, but update as needed</td> </tr> <tr> <td><b>Service Code</b></td> <td>Enter the requested procedure code. <b>Note:</b> 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 <b>Advanced Search</b> link to initiate a search for the procedure code.</td> </tr> <tr> <td><b>Modifier</b></td> <td>Enter modifier details as appropriate</td> </tr> <tr> <td><b>Start Date</b></td> <td>Defaults to match the Actual Admit date, update as needed</td> </tr> <tr> <td><b>End Date</b></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 <b>Optional Fields</b> hyperlink.</p> <table border="1"> <tr> <td><b>Time Frame</b></td> <td>Defaults to 1, but update as needed</td> </tr> <tr> <td><b>Time Period</b></td> <td>Defaults to 1, but update as needed</td> </tr> <tr> <td><b>Units</b></td> <td>Defaults to 1, but update as needed</td> </tr> <tr> <td><b>UCR Cost</b></td> <td>N/A – not used</td> </tr> </table>	<b>Service Type</b>	Defaults to Inpatient, but update as needed	<b>Place of Service</b>	Defaults to Medical, but update as needed	<b>Code Type</b>	Defaults to CPT, but update as needed	<b>Service Code</b>	Enter the requested procedure code. <b>Note:</b> 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 <b>Advanced Search</b> link to initiate a search for the procedure code.	<b>Modifier</b>	Enter modifier details as appropriate	<b>Start Date</b>	Defaults to match the Actual Admit date, update as needed	<b>End Date</b>	Defaults to the next day, update as needed	<b>Time Frame</b>	Defaults to 1, but update as needed	<b>Time Period</b>	Defaults to 1, but update as needed	<b>Units</b>	Defaults to 1, but update as needed	<b>UCR Cost</b>	N/A – not used
<b>Service Type</b>	Defaults to Inpatient, but update as needed																						
<b>Place of Service</b>	Defaults to Medical, but update as needed																						
<b>Code Type</b>	Defaults to CPT, but update as needed																						
<b>Service Code</b>	Enter the requested procedure code. <b>Note:</b> 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 <b>Advanced Search</b> link to initiate a search for the procedure code.																						
<b>Modifier</b>	Enter modifier details as appropriate																						
<b>Start Date</b>	Defaults to match the Actual Admit date, update as needed																						
<b>End Date</b>	Defaults to the next day, update as needed																						
<b>Time Frame</b>	Defaults to 1, but update as needed																						
<b>Time Period</b>	Defaults to 1, but update as needed																						
<b>Units</b>	Defaults to 1, but update as needed																						
<b>UCR Cost</b>	N/A – not used																						

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

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

Step	Action												
1.	<p>Complete the following:</p> <ol style="list-style-type: none"><li><b>Document Title:</b> enter the title of the document</li><li><b>Document Type:</b> defaults to <b>Medical Document</b>, update as needed.</li><li><b>Document Description:</b> optional field</li><li>Click the <b>Browse</b> button to search for the document you wish to upload<ol style="list-style-type: none"><li>Click the desired document and click the <b>Open</b> button</li></ol></li><li>You will see the document name listed next to the <b>Browse</b> button.</li><li>You may add additional documents by selecting <b>Add</b>.</li><li>Select <b>Done</b> when you have added all documents you wish to attach.</li></ol> <div data-bbox="228 751 1536 1276"><p><b>Add Documents</b></p><p>Document Title * <input type="text" value="Additional Clinical"/></p><p>Document Type <input type="text" value="Medical Document"/></p><p>Document Description <input type="text" value="Allows 5000 characters only"/></p><p>Select Document * <input type="button" value="Browse"/> Document 2- for upload.docx</p><p><input type="button" value="Add"/></p><p><b>Selected Files</b></p><table border="1"><thead><tr><th></th><th>Document Title</th><th>Type</th><th>Date Added</th><th>Added User</th><th>Description</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>Clinical</td><td>Medical Document</td><td>10/13/2021</td><td>Williams, Jessica</td><td></td></tr></tbody></table><p><input type="button" value="Done"/></p></div>		Document Title	Type	Date Added	Added User	Description	<input type="checkbox"/>	Clinical	Medical Document	10/13/2021	Williams, Jessica	
	Document Title	Type	Date Added	Added User	Description								
<input type="checkbox"/>	Clinical	Medical Document	10/13/2021	Williams, Jessica									

## 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 ✓

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

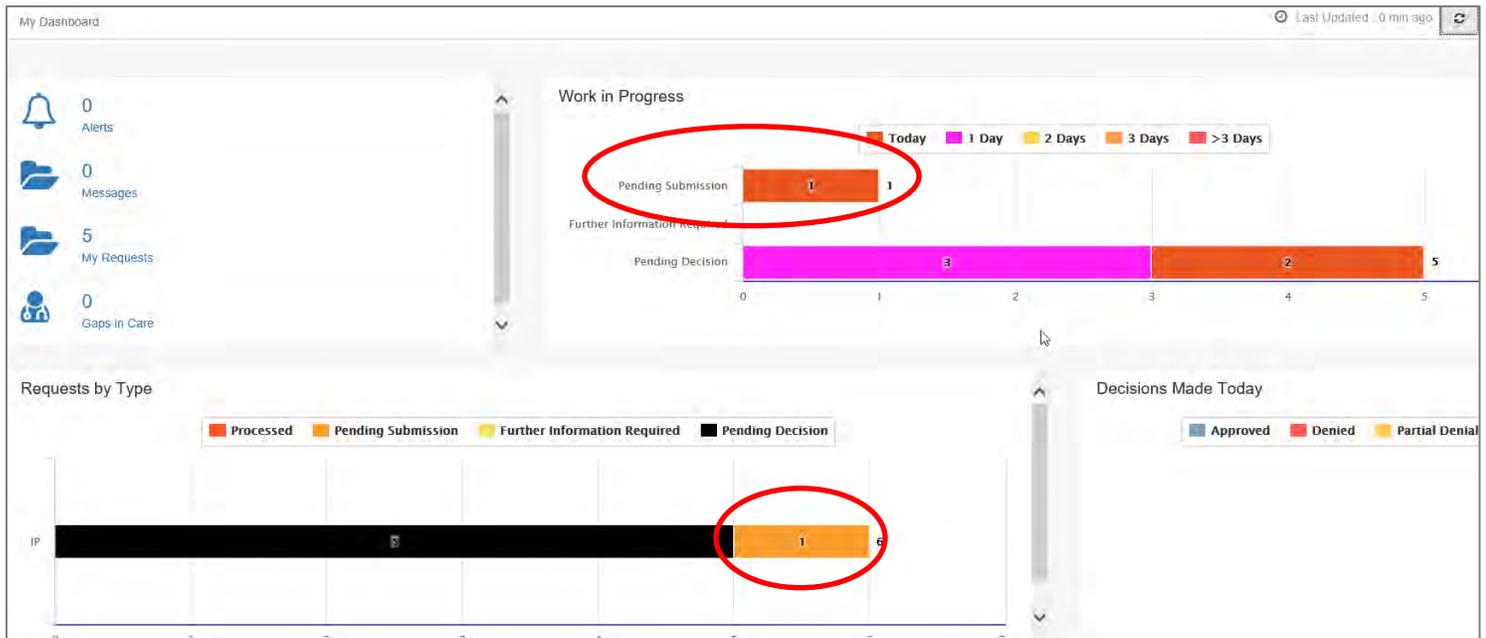


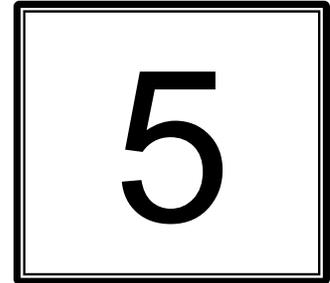
This is a shared note field. Notes can be viewed and entered by both you and the Plan.

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

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

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



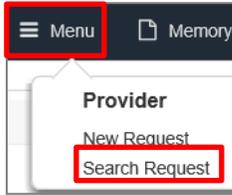
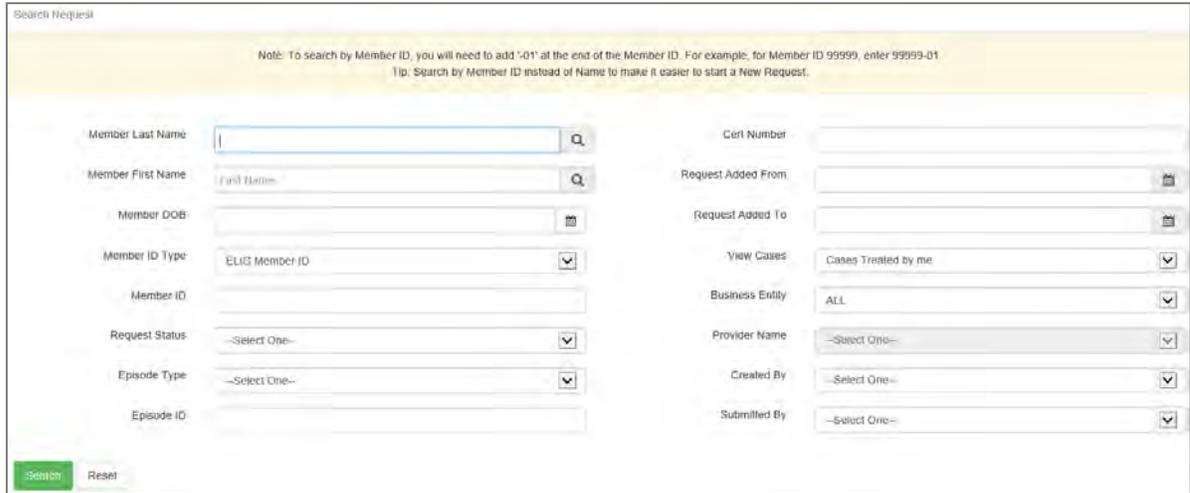


## **5 ADD CLINICAL TO AN EXISTING IP NON-CLINICAL REQUEST**

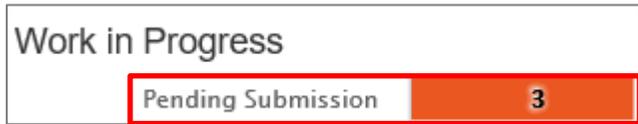
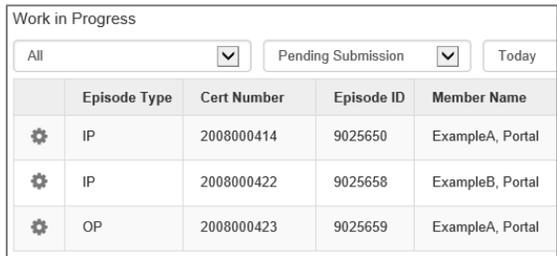
# How to Add Clinical Information to Existing IP Non-Clinical Request

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

## Option #1: Search Request

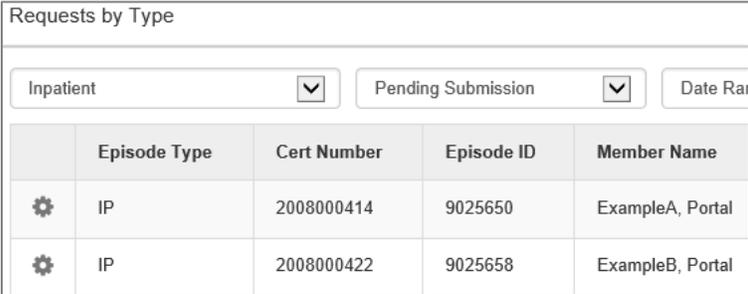
Step	Action
1.	<p>Click on <b>Menu</b> and select <b>Search Request</b></p> 
2.	<p>Enter the appropriate search criteria and click on the <b>Search</b> button.</p> 
3.	<p>What results display will be based on the refinement of the search criteria.</p> <p><b>Note:</b> Only those episodes for which you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

## Option #2: Dashboard – Work in Progress Widget

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

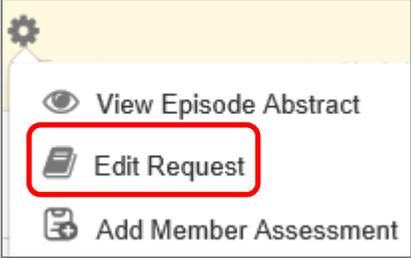
# How to Add Clinical Information to Existing IP Non-Clinical Request

## Option #3: Dashboard – Requests by Type Widget

Step	Action															
1.	<p>Click on the <b>Pending Submission</b> hyperlink bar in the <i>Request by Type</i> widget</p>  <p>The screenshot shows a 'Requests by Type' widget with a legend: Processed (red), Pending Submission (orange), Further Information Required (yellow), and Pending Decision (black). The bar chart shows: IP (5, black bar), OP (1, orange bar), and Pending Submission (2, orange bar). A red circle highlights 'IP' and a red rectangle highlights '2'.</p>															
2.	<p>All Pending Submission requests for that Episode Type will be displayed.</p>  <p>The screenshot shows the 'Requests by Type' widget with filters: Inpatient (dropdown), Pending Submission (dropdown), and Date Range. The table below displays the results:</p> <table border="1" data-bbox="245 741 993 913"> <thead> <tr> <th></th> <th>Episode Type</th> <th>Cert Number</th> <th>Episode ID</th> <th>Member Name</th> </tr> </thead> <tbody> <tr> <td>⚙️</td> <td>IP</td> <td>2008000414</td> <td>9025650</td> <td>ExampleA, Portal</td> </tr> <tr> <td>⚙️</td> <td>IP</td> <td>2008000422</td> <td>9025658</td> <td>ExampleB, Portal</td> </tr> </tbody> </table>		Episode Type	Cert Number	Episode ID	Member Name	⚙️	IP	2008000414	9025650	ExampleA, Portal	⚙️	IP	2008000422	9025658	ExampleB, Portal
	Episode Type	Cert Number	Episode ID	Member Name												
⚙️	IP	2008000414	9025650	ExampleA, Portal												
⚙️	IP	2008000422	9025658	ExampleB, Portal												

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

Follow these steps to open the request for editing.

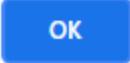
Step	Action
1.	<p>Click on the  icon to the left of the episode and select <b>Edit Request</b>.</p> <div data-bbox="245 436 626 642"></div> <div data-bbox="688 384 1099 642"></div> <p><b>Note:</b> Depending on how you accessed the episode, you may see different options under the gear.</p>
2.	The request will open and is read to be updated.

# Adding Clinical Information to Existing 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.	<p>Click the <b>Check for Review</b> button.</p> 																																				
2.	<p>You will receive the following message. Click <b>OK only</b> if you completed the items listed.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>pr-jv6-ap-pp.amerhealthcaritas.com says</p> <p>There are stay/service lines to be reviewed. Kindly complete the same before submit.</p> <p style="text-align: right;"></p> </div>																																				
3.	<p>Click the appropriate <b>Go to Criteria</b> button.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">If...</th> <th style="width: 50%;">Then...</th> </tr> </thead> <tbody> <tr> <td>Only a <b>Stay Request</b></td> <td> <ul style="list-style-type: none"> <li>Click the <b>Go to Criteria</b> button associated with the <b>Stay Request</b>.</li> </ul> </td> </tr> <tr> <td>Both <b>Stay</b> and <b>Service Requests</b></td> <td> <ul style="list-style-type: none"> <li>The <b>Go to Criteria</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Go to Criteria</b> button associated with the <b>Service Request</b>.</li> </ul> </td> </tr> </tbody> </table> <div style="margin-top: 10px;"> <p><b>Stay Request</b></p> <table style="width: 100%;"> <tr> <td>Treatment Setting *</td> <td>Hospital - Inpatient</td> <td>Actual Admit Date</td> <td>10/12/2021</td> </tr> <tr> <td>Treatment Type</td> <td>Medical</td> <td>LOS Requested</td> <td>1</td> </tr> <tr> <td>Requested Level Of Care</td> <td>Medical</td> <td>Review Status</td> <td></td> </tr> </table> <p style="text-align: center;"></p> </div> <div style="margin-top: 10px;"> <p><b>Go to Criteria</b></p> <p><b>Service Request</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Action</th> <th>Service Code</th> <th>Modifier</th> <th>Requested#</th> <th>Start Date</th> <th>End Date</th> <th>Treatment Setting</th> <th>Treatment Type</th> <th>Review Status</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>58280(CPT)</td> <td></td> <td>1</td> <td>10/15/2021</td> <td>11/15/2021</td> <td>Hospital - Inpatient</td> <td>Medical</td> <td></td> </tr> </tbody> </table> </div>	If...	Then...	Only a <b>Stay Request</b>	<ul style="list-style-type: none"> <li>Click the <b>Go to Criteria</b> button associated with the <b>Stay Request</b>.</li> </ul>	Both <b>Stay</b> and <b>Service Requests</b>	<ul style="list-style-type: none"> <li>The <b>Go to Criteria</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Go to Criteria</b> button associated with the <b>Service Request</b>.</li> </ul>	Treatment Setting *	Hospital - Inpatient	Actual Admit Date	10/12/2021	Treatment Type	Medical	LOS Requested	1	Requested Level Of Care	Medical	Review Status		Action	Service Code	Modifier	Requested#	Start Date	End Date	Treatment Setting	Treatment Type	Review Status	<input checked="" type="checkbox"/>	58280(CPT)		1	10/15/2021	11/15/2021	Hospital - Inpatient	Medical	
If...	Then...																																				
Only a <b>Stay Request</b>	<ul style="list-style-type: none"> <li>Click the <b>Go to Criteria</b> button associated with the <b>Stay Request</b>.</li> </ul>																																				
Both <b>Stay</b> and <b>Service Requests</b>	<ul style="list-style-type: none"> <li>The <b>Go to Criteria</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Go to Criteria</b> button associated with the <b>Service Request</b>.</li> </ul>																																				
Treatment Setting *	Hospital - Inpatient	Actual Admit Date	10/12/2021																																		
Treatment Type	Medical	LOS Requested	1																																		
Requested Level Of Care	Medical	Review Status																																			
Action	Service Code	Modifier	Requested#	Start Date	End Date	Treatment Setting	Treatment Type	Review Status																													
<input checked="" type="checkbox"/>	58280(CPT)		1	10/15/2021	11/15/2021	Hospital - Inpatient	Medical																														

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

Step	Action						
4.	<p>You will receive the following message. Click <b>OK</b> <u>only</u> if you completed the items listed.</p> <div data-bbox="243 352 1120 682" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>pr-jv6-ap-pp.amerihealthcaritas.com says</p> <p>Click OK only after all diagnoses, stay and/or service detail lines are completed. Edits are not permitted after clicking OK. Click Cancel to edit or OK to continue.</p> <div style="text-align: right; margin-top: 10px;"> <span style="background-color: #0070C0; color: white; padding: 5px 15px; border-radius: 3px;">OK</span> <span style="border: 1px solid #0070C0; padding: 5px 15px; border-radius: 3px; margin-left: 10px;">Cancel</span> </div> </div>						
5.	<p>The system will connect with InterQual and determine if there is a matching guideline.</p> <table border="1" data-bbox="240 793 1550 1535" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="240 793 581 835">If there is...</th> <th data-bbox="581 793 1550 835">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 835 581 1207"> <p><b>Matching Guideline</b></p> </td> <td data-bbox="581 835 1550 1207"> <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <b>Proceed to Step 6 in this section.</b></p> <div data-bbox="597 926 1242 1199" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="background-color: #f0f0f0; margin: 0; padding: 2px;">Select Guideline</p> <p style="background-color: #f0f0f0; margin: 0; padding: 2px;">InterQual Guideline Selection</p> <p>Code : <span style="border: 1px solid #ccc; padding: 2px 10px;">I50.9, G0493</span></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A  <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</p> <div style="text-align: right; margin-top: 5px;"> <span style="background-color: #0070C0; color: white; padding: 2px 8px; border-radius: 3px;">Ok</span> <span style="border: 1px solid #ccc; padding: 2px 8px; border-radius: 3px; margin-left: 5px;">Cancel</span> </div> </div> </td> </tr> <tr> <td data-bbox="240 1207 581 1535"> <p><b>No Matching Guideline</b></p> </td> <td data-bbox="581 1207 1550 1535"> <p>You will receive this pop-up. Click <b>OK</b> to close the window and you will be returned to the request screen. <b>Proceed to Adding Documents.</b></p> <div data-bbox="597 1297 1242 1528" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="background-color: #f0f0f0; margin: 0; padding: 2px;">Select Guideline <span style="float: right; font-size: 0.8em;">✕</span></p> <p style="background-color: #f0f0f0; margin: 0; padding: 2px;">InterQual Guideline Selection</p> <p>Code : <span style="border: 1px solid #ccc; padding: 2px 10px;">J40</span></p> <p>Guideline : No matching guideline was found.</p> <div style="text-align: right; margin-top: 5px;"> <span style="background-color: #0070C0; color: white; padding: 2px 8px; border-radius: 3px;">Ok</span> <span style="border: 1px solid #ccc; padding: 2px 8px; border-radius: 3px; margin-left: 5px;">Cancel</span> </div> </div> </td> </tr> </tbody> </table>	If there is...	Then...	<p><b>Matching Guideline</b></p>	<p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <b>Proceed to Step 6 in this section.</b></p> <div data-bbox="597 926 1242 1199" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="background-color: #f0f0f0; margin: 0; padding: 2px;">Select Guideline</p> <p style="background-color: #f0f0f0; margin: 0; padding: 2px;">InterQual Guideline Selection</p> <p>Code : <span style="border: 1px solid #ccc; padding: 2px 10px;">I50.9, G0493</span></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A  <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</p> <div style="text-align: right; margin-top: 5px;"> <span style="background-color: #0070C0; color: white; padding: 2px 8px; border-radius: 3px;">Ok</span> <span style="border: 1px solid #ccc; padding: 2px 8px; border-radius: 3px; margin-left: 5px;">Cancel</span> </div> </div>	<p><b>No Matching Guideline</b></p>	<p>You will receive this pop-up. Click <b>OK</b> to close the window and you will be returned to the request screen. <b>Proceed to Adding Documents.</b></p> <div data-bbox="597 1297 1242 1528" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="background-color: #f0f0f0; margin: 0; padding: 2px;">Select Guideline <span style="float: right; font-size: 0.8em;">✕</span></p> <p style="background-color: #f0f0f0; margin: 0; padding: 2px;">InterQual Guideline Selection</p> <p>Code : <span style="border: 1px solid #ccc; padding: 2px 10px;">J40</span></p> <p>Guideline : No matching guideline was found.</p> <div style="text-align: right; margin-top: 5px;"> <span style="background-color: #0070C0; color: white; padding: 2px 8px; border-radius: 3px;">Ok</span> <span style="border: 1px solid #ccc; padding: 2px 8px; border-radius: 3px; margin-left: 5px;">Cancel</span> </div> </div>
If there is...	Then...						
<p><b>Matching Guideline</b></p>	<p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <b>Proceed to Step 6 in this section.</b></p> <div data-bbox="597 926 1242 1199" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="background-color: #f0f0f0; margin: 0; padding: 2px;">Select Guideline</p> <p style="background-color: #f0f0f0; margin: 0; padding: 2px;">InterQual Guideline Selection</p> <p>Code : <span style="border: 1px solid #ccc; padding: 2px 10px;">I50.9, G0493</span></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A  <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</p> <div style="text-align: right; margin-top: 5px;"> <span style="background-color: #0070C0; color: white; padding: 2px 8px; border-radius: 3px;">Ok</span> <span style="border: 1px solid #ccc; padding: 2px 8px; border-radius: 3px; margin-left: 5px;">Cancel</span> </div> </div>						
<p><b>No Matching Guideline</b></p>	<p>You will receive this pop-up. Click <b>OK</b> to close the window and you will be returned to the request screen. <b>Proceed to Adding Documents.</b></p> <div data-bbox="597 1297 1242 1528" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="background-color: #f0f0f0; margin: 0; padding: 2px;">Select Guideline <span style="float: right; font-size: 0.8em;">✕</span></p> <p style="background-color: #f0f0f0; margin: 0; padding: 2px;">InterQual Guideline Selection</p> <p>Code : <span style="border: 1px solid #ccc; padding: 2px 10px;">J40</span></p> <p>Guideline : No matching guideline was found.</p> <div style="text-align: right; margin-top: 5px;"> <span style="background-color: #0070C0; color: white; padding: 2px 8px; border-radius: 3px;">Ok</span> <span style="border: 1px solid #ccc; padding: 2px 8px; border-radius: 3px; margin-left: 5px;">Cancel</span> </div> </div>						

## 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 <b>Criteria Met</b> or <b>Criteria Not Met</b> .						
7.	From the <b>Recommendations</b> page: <table border="1" data-bbox="240 422 1552 590"> <thead> <tr> <th data-bbox="240 422 440 464">If you click...</th> <th data-bbox="440 422 1552 464">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 464 440 506"><b>Save</b></td> <td data-bbox="440 464 1552 506">The review will be saved and can be updated, if needed, prior to submitting the request.</td> </tr> <tr> <td data-bbox="240 506 440 590"><b>Complete</b></td> <td data-bbox="440 506 1552 590">The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td> </tr> </tbody> </table>	If you click...	Then...	<b>Save</b>	The review will be saved and can be updated, if needed, prior to submitting the request.	<b>Complete</b>	The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.
If you click...	Then...						
<b>Save</b>	The review will be saved and can be updated, if needed, prior to submitting the request.						
<b>Complete</b>	The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.						
8.	Close the InterQual tab to return to the Provider Portal						
9.	The request line will now display a status in the <b>Decision</b> column.						

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

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

Assessments

New In Progress Completed Voided

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

Start  
Void  
Trend Report  
Print Blank Assessment

Page 1 of 1

Complete Save Save and Generate POC Cancel

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

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

Timer 00 : 00 : 09

Sample Question...

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

Step	Action												
2.	<p>Complete the following:</p> <ol style="list-style-type: none"> <li><b>Document Title:</b> enter the title of the document</li> <li><b>Document Type:</b> defaults to <b>Medical Document</b>, update as needed.</li> <li><b>Document Description:</b> optional field</li> <li>Click the <b>Browse</b> button to search for the document you wish to upload               <ol style="list-style-type: none"> <li>Click the desired document and click the <b>Open</b> button</li> </ol> </li> <li>You will see the document name listed next to the <b>Browse</b> button.</li> <li>You may add additional documents by selecting <b>Add</b>.</li> <li>Select <b>Done</b> when you have added all documents you wish to attach.</li> </ol> <div data-bbox="228 779 1536 1308" style="border: 1px solid black; padding: 10px;"> <p><b>Add Documents</b></p> <p>Document Title * <input type="text" value="Additional Clinical"/></p> <p>Document Type <input style="border: none; border-bottom: 1px solid #ccc; background-color: #f9f9f9; padding: 2px 5px;" type="text" value="Medical Document"/> <span style="font-size: 0.8em;">▼</span></p> <p>Document Description <input type="text" value="Allows 5000 characters only"/></p> <p>Select Document * <input type="button" value="Browse"/> Document 2- for upload.docx</p> <p style="text-align: center;"><input type="button" value="Add"/></p> <hr/> <p><b>Selected Files</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 30%;">Document Title</th> <th style="width: 20%;">Type</th> <th style="width: 15%;">Date Added</th> <th style="width: 20%;">Added User</th> <th style="width: 10%;">Description</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">-</td> <td>Clinical</td> <td>Medical Document</td> <td>10/13/2021</td> <td>Williams, Jessica</td> <td></td> </tr> </tbody> </table> <p style="text-align: center;"><input type="button" value="Done"/></p> </div>		Document Title	Type	Date Added	Added User	Description	-	Clinical	Medical Document	10/13/2021	Williams, Jessica	
	Document Title	Type	Date Added	Added User	Description								
-	Clinical	Medical Document	10/13/2021	Williams, Jessica									

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

**Notes**

Note Type: --Select One--

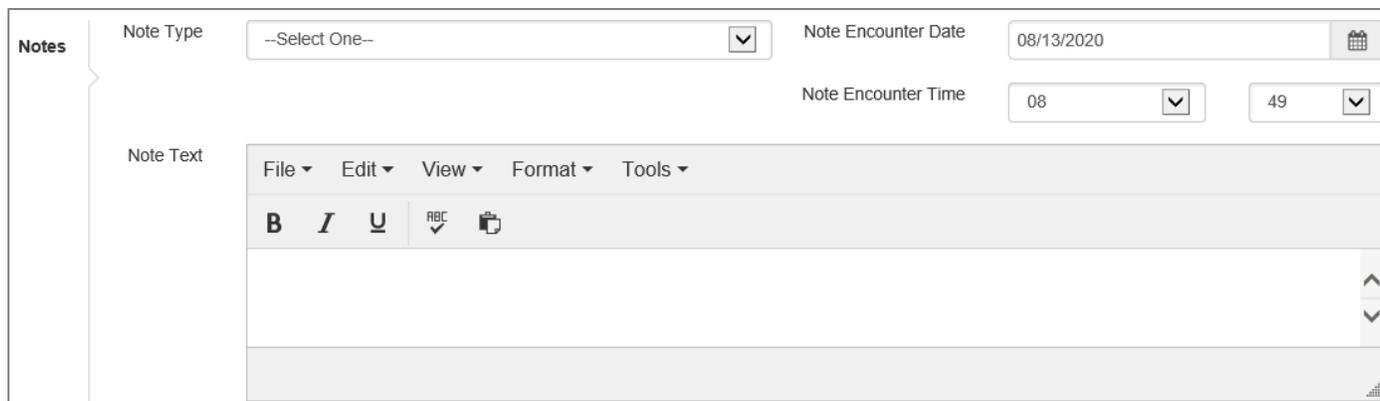
Note Encounter Date: 08/13/2020

Note Encounter Time: 08:49

Note Text

File Edit View Format Tools

**B** *I* U ABC ✓



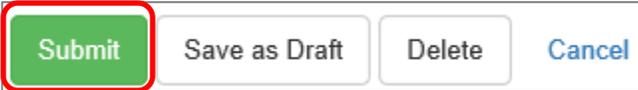
Step	Action
3.	Select the appropriate <b>Note Type</b> from the drop-down menu.
4.	Enter the appropriate notes in the notes section. Be sure to include your <b>name</b> and <b>contact information</b> in the event the Plan needs to contact you.



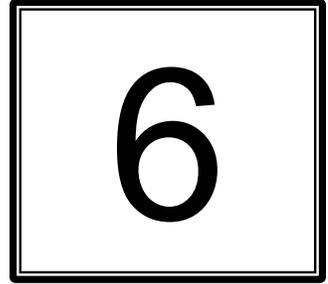
This is a shared note field. Notes can be viewed and entered by both you and the Plan.

## 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 <b>Submit</b> button to submit your request.</p>  <p><b>Note:</b> The <b>Submit</b> 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><b>Note:</b> If the request is programmed to auto-approve, you will see <b>Approved</b> in the <b>Decision</b> column.</p>

Request Details										
Episode Abstract										
Expected Decision Date :		Authorization Type : IP		Episode Number : 9025648		Episode Status : OpenRequest		Cert Number 2008000412		
08/15/2020										
Stay Request	Stay ID	LOS Requested#	LOS Assigned#	LOS Denied	Auth Start Date	Auth End Date	Service Type	Decision		
	12548537	1	0	0	08/17/2020	08/18/2020	Inpatient	-		
Authorization Details	Service ID	Service Code	Requested #	Assigned #	Denied	Auth Start Date	Auth End Date	Service Type	Frequency	Decision
	12548538	27428(CPT)	1	0	0			Inpatient	Per Day	Pending



## **6 ENTER AN OP CLINICAL REQUEST**

## How to Enter an Outpatient Clinical Request

---

When entering a request you have 2 options:

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

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

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

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

## Adding a New OP Clinical Request – Adding Episode Details

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

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

The screenshot shows the top portion of a web application interface. At the top, there is a header bar with member information: "ExampleA, Portal (Female) DOB: Member ID: Government Id:". Below this is a navigation bar with tabs for "Address 1234 Mulberry L... IA", "Phone & Email (515) 555-5555", "Coverage", "Group", "PCP/PCM", and "Allergies". A red circle highlights a drop-down caret on the right side of the navigation bar. Below the navigation bar is the "Outpatient Request" section. On the left, there is a tab labeled "Episode Details" with a red 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.	<b>Request Type:</b> defaults to <b>Expected</b> , update if appropriate
2.	<b>Request Priority:</b> defaults to <b>Standard 24</b> , update if appropriate

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

This screenshot shows the "Optional Fields" section of the "Episode Details" tab. It contains two rows of fields. The first row has "Request Type \*" with "Expected" selected and "Request Priority \*" with "Standard 24" selected. The second row, which is highlighted with a red border, contains "Time Request" with "24 Hours" entered and "Reason for Request" with "--Select One--" selected. Both fields in the second row have a red border around them.

- **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.*”

i **Diagnosis**

Code Type \*

Diagnosis \*

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

Step	Action												
1.	<b>Code Type</b> will default to ICD10. You may select a different code type if applicable.												
2.	Type the diagnosis or code in the <b>Diagnosis</b> field. You may also use the <b>Advanced Search</b> function, if needed.												
3.	Once you select the diagnosis, it will display on the screen and be attached to the episode. <table border="1" style="margin: 10px auto; width: 80%; border-collapse: collapse;"> <thead> <tr style="background-color: #cccccc;"> <th>Primary Dx</th> <th>Code Type</th> <th>Diagnosis</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">★</td> <td>ICD10</td> <td>I50.9--Heart failure, unspecified</td> <td></td> </tr> <tr> <td style="text-align: center;">☆</td> <td>ICD10</td> <td>R69--Illness, unspecified</td> <td style="text-align: center;">-</td> </tr> </tbody> </table>	Primary Dx	Code Type	Diagnosis	Actions	★	ICD10	I50.9--Heart failure, unspecified		☆	ICD10	R69--Illness, unspecified	-
Primary Dx	Code Type	Diagnosis	Actions										
★	ICD10	I50.9--Heart failure, unspecified											
☆	ICD10	R69--Illness, unspecified	-										
4.	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #cccccc;"> <th style="width: 40%;">If you...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>want to add additional diagnoses</td> <td>           Repeat steps 2 and 3.   <b>Note:</b>            - 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 <b>Star</b> ★ in the <b>Primary Dx</b> column if you need to designate a different diagnosis as primary.         </td> </tr> <tr> <td><b>do not</b> want to add additional diagnoses</td> <td>Proceed to the <b>Providers</b> section of the episode.</td> </tr> </tbody> </table>	If you...	Then...	want to add additional diagnoses	Repeat steps 2 and 3.  <b>Note:</b> - 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 <b>Star</b> ★ in the <b>Primary Dx</b> column if you need to designate a different diagnosis as primary.	<b>do not</b> want to add additional diagnoses	Proceed to the <b>Providers</b> section of the episode.						
If you...	Then...												
want to add additional diagnoses	Repeat steps 2 and 3.  <b>Note:</b> - 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 <b>Star</b> ★ in the <b>Primary Dx</b> column if you need to designate a different diagnosis as primary.												
<b>do not</b> want to add additional diagnoses	Proceed to the <b>Providers</b> section of the episode.												

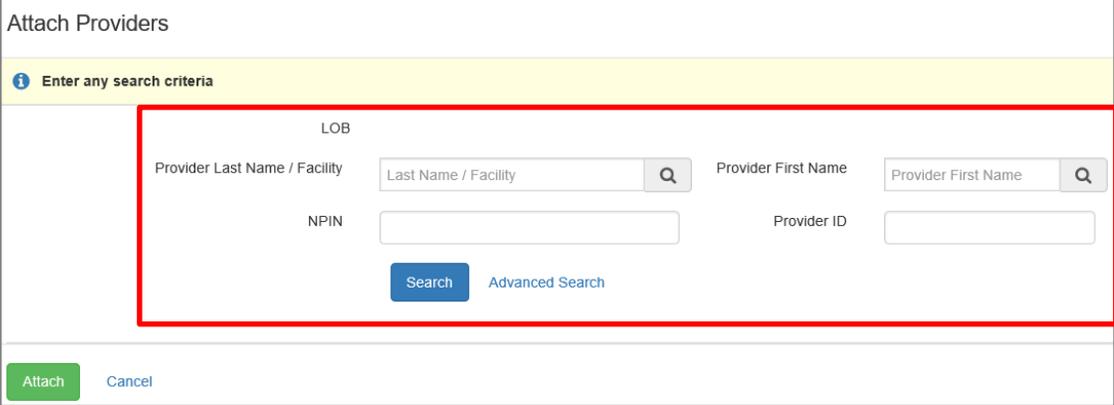
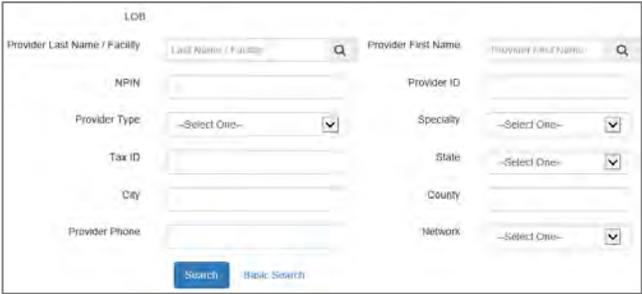
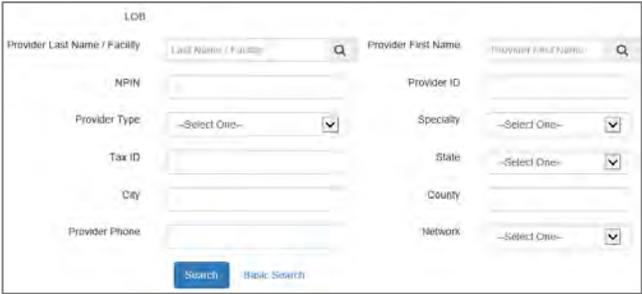
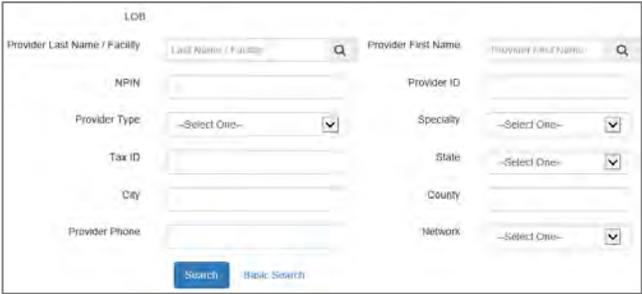
## Adding a New OP Clinical Request – Adding Providers

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 <b>Attach Providers</b> button.</p> 						
2.	<p>Enter the appropriate search criteria and click on <b>Search</b>.</p> 						
3.	<p>After clicking <b>Search</b>:</p> <table border="1" data-bbox="354 1329 1464 1850"> <thead> <tr> <th data-bbox="354 1329 712 1388">If appropriate provider...</th> <th data-bbox="712 1329 1464 1388">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="354 1388 712 1446">Is displayed</td> <td data-bbox="712 1388 1464 1446">Click the <b>Attach</b> button</td> </tr> <tr> <td data-bbox="354 1446 712 1850"><i>Is not</i> displayed</td> <td data-bbox="712 1446 1464 1850"> <p>You may use the <b>Advanced Search</b> functionality and click the <b>Attach</b> button after locating the provider</p>  </td> </tr> </tbody> </table>	If appropriate provider...	Then...	Is displayed	Click the <b>Attach</b> button	<i>Is not</i> displayed	<p>You may use the <b>Advanced Search</b> functionality and click the <b>Attach</b> button after locating the provider</p> 
If appropriate provider...	Then...						
Is displayed	Click the <b>Attach</b> button						
<i>Is not</i> displayed	<p>You may use the <b>Advanced Search</b> functionality and click the <b>Attach</b> 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		

-  Single Attach
-  Multiple Attach
-  Set as Favorite

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



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

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

### NOTE:

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

## Adding a New OP Clinical Request – Adding Service Request

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



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

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

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

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

Step	Action																												
2.	<p>Click the <b>Add</b> button.</p> <p><b>Result:</b> The Service Request line will now be populated (appears below the Service Request fields)</p> <table border="1" data-bbox="233 359 1518 600"> <thead> <tr> <th colspan="7" data-bbox="233 359 1518 405">Service Request</th> </tr> <tr> <th data-bbox="233 405 431 464">Action</th> <th data-bbox="431 405 621 464">Service Code</th> <th data-bbox="621 405 805 464">Requested#</th> <th data-bbox="805 405 964 464">Start Date</th> <th data-bbox="964 405 1118 464">End Date</th> <th data-bbox="1118 405 1299 464">Service Type</th> <th data-bbox="1299 405 1518 464">Place of Service</th> </tr> </thead> <tbody> <tr> <td data-bbox="233 464 431 529">-</td> <td data-bbox="431 464 621 529">G0493(HCPC)</td> <td data-bbox="621 464 805 529">5</td> <td data-bbox="805 464 964 529">08/17/2020</td> <td data-bbox="964 464 1118 529">09/01/2020</td> <td data-bbox="1118 464 1299 529">Home</td> <td data-bbox="1299 464 1518 529">Medical</td> </tr> <tr> <td data-bbox="233 529 431 600">-</td> <td data-bbox="431 529 621 600">S9131(HCPC)</td> <td data-bbox="621 529 805 600">14</td> <td data-bbox="805 529 964 600">08/19/2020</td> <td data-bbox="964 529 1118 600">09/02/2020</td> <td data-bbox="1118 529 1299 600">Home</td> <td data-bbox="1299 529 1518 600">Medical</td> </tr> </tbody> </table> <p><b>Note:</b> If a Service Request was added in error or with incorrect information, you may click the icon in the <b>Action</b> 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.	<p>Click the <b>Check for Review</b> button.</p> 																								
2.	<p>Once determined that one or both exists, you will receive the following pop-up message. Click <b>OK</b>.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>pr-jv6-ap-pp.amerihealthcaritas.com says</p> <p>There are stay/service lines to be reviewed. Kindly complete the same before submit.</p> <div style="text-align: right;">  </div> </div>																								
3.	<p>Click the appropriate <b>Go to Criteria</b> button.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">If...</th> <th style="width: 50%;">Then...</th> </tr> </thead> <tbody> <tr> <td>Only a <b>Stay Request</b></td> <td> <ul style="list-style-type: none"> <li>Click the <b>Go to Criteria</b> button associated with the <b>Stay Request</b>.</li> </ul> </td> </tr> <tr> <td>Both <b>Stay</b> and <b>Service Requests</b></td> <td> <ul style="list-style-type: none"> <li>The <b>Go to Criteria</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Go to Criteria</b> button associated with the <b>Service Request</b>.</li> </ul> </td> </tr> </tbody> </table> <div style="margin-top: 10px;"> <p><b>Stay Request</b></p>  </div> <div style="margin-top: 10px;"> <p><b>Go to Criteria</b></p> <p><b>Service Request</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Action</th> <th>Service Code</th> <th>Modifier</th> <th>Requested#</th> <th>Start Date</th> <th>End Date</th> <th>Treatment Setting</th> <th>Treatment Type</th> <th>Review Status</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td>58280(CPT)</td> <td></td> <td style="text-align: center;">1</td> <td style="text-align: center;">10/15/2021</td> <td style="text-align: center;">11/15/2021</td> <td style="text-align: center;">Hospital - Inpatient</td> <td style="text-align: center;">Medical</td> <td></td> </tr> </tbody> </table> </div>	If...	Then...	Only a <b>Stay Request</b>	<ul style="list-style-type: none"> <li>Click the <b>Go to Criteria</b> button associated with the <b>Stay Request</b>.</li> </ul>	Both <b>Stay</b> and <b>Service Requests</b>	<ul style="list-style-type: none"> <li>The <b>Go to Criteria</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Go to Criteria</b> button associated with the <b>Service Request</b>.</li> </ul>	Action	Service Code	Modifier	Requested#	Start Date	End Date	Treatment Setting	Treatment Type	Review Status	<input checked="" type="checkbox"/>	58280(CPT)		1	10/15/2021	11/15/2021	Hospital - Inpatient	Medical	
If...	Then...																								
Only a <b>Stay Request</b>	<ul style="list-style-type: none"> <li>Click the <b>Go to Criteria</b> button associated with the <b>Stay Request</b>.</li> </ul>																								
Both <b>Stay</b> and <b>Service Requests</b>	<ul style="list-style-type: none"> <li>The <b>Go to Criteria</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Go to Criteria</b> button associated with the <b>Service Request</b>.</li> </ul>																								
Action	Service Code	Modifier	Requested#	Start Date	End Date	Treatment Setting	Treatment Type	Review Status																	
<input checked="" type="checkbox"/>	58280(CPT)		1	10/15/2021	11/15/2021	Hospital - Inpatient	Medical																		

## Adding a New OP Clinical Request – InterQual, cont.

Step	Action						
4.	<p>You will receive the following message. Click <b>OK only</b> if you completed the items listed.</p> <div data-bbox="240 310 1084 646" style="border: 1px solid black; padding: 10px;"> <p>pr-jv6-ap-pp.amerihealthcaritas.com says</p> <p>Click OK only after all diagnoses, stay and/or service detail lines are completed. Edits are not permitted after clicking OK. Click Cancel to edit or OK to continue.</p> <div style="text-align: right;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </div> </div>						
5.	<p>The system will connect with InterQual and determine if there is a matching guideline.</p> <table border="1" data-bbox="240 751 1552 1497"> <thead> <tr> <th data-bbox="240 751 581 804">If there is...</th> <th data-bbox="581 751 1552 804">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 804 581 1171"> <p><b>Matching Guideline</b></p> </td> <td data-bbox="581 804 1552 1171"> <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <b>Proceed to Step 6 in this section.</b></p> <div data-bbox="597 888 1239 1161" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="I50.9, G0493"/></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A  <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div> </td> </tr> <tr> <td data-bbox="240 1171 581 1497"> <p><b>No Matching Guideline</b></p> </td> <td data-bbox="581 1171 1552 1497"> <p>You will receive this pop-up. Click <b>OK</b> to close the window and you will be returned to the request screen. <b>Proceed to Adding Documents.</b></p> <div data-bbox="597 1266 1247 1486" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="J40"/></p> <p>Guideline : No matching guideline was found.</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div> </td> </tr> </tbody> </table>	If there is...	Then...	<p><b>Matching Guideline</b></p>	<p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <b>Proceed to Step 6 in this section.</b></p> <div data-bbox="597 888 1239 1161" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="I50.9, G0493"/></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A  <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div>	<p><b>No Matching Guideline</b></p>	<p>You will receive this pop-up. Click <b>OK</b> to close the window and you will be returned to the request screen. <b>Proceed to Adding Documents.</b></p> <div data-bbox="597 1266 1247 1486" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="J40"/></p> <p>Guideline : No matching guideline was found.</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div>
If there is...	Then...						
<p><b>Matching Guideline</b></p>	<p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <b>Proceed to Step 6 in this section.</b></p> <div data-bbox="597 888 1239 1161" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="I50.9, G0493"/></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A  <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div>						
<p><b>No Matching Guideline</b></p>	<p>You will receive this pop-up. Click <b>OK</b> to close the window and you will be returned to the request screen. <b>Proceed to Adding Documents.</b></p> <div data-bbox="597 1266 1247 1486" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="J40"/></p> <p>Guideline : No matching guideline was found.</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div>						

## Adding a New OP Clinical Request – InterQual, cont.

---

Step	Action						
6.	After answering the review questions, the Recommendations page will display either <b>Criteria Met</b> or <b>Criteria Not Met</b> .						
7.	From the <b>Recommendations</b> page: <table border="1" data-bbox="240 420 1555 588"> <thead> <tr> <th data-bbox="240 420 440 464">If you click...</th> <th data-bbox="440 420 1555 464">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 464 440 508"><b>Save</b></td> <td data-bbox="440 464 1555 508">The review will be saved and can be updated, if needed, prior to submitting the request.</td> </tr> <tr> <td data-bbox="240 508 440 588"><b>Complete</b></td> <td data-bbox="440 508 1555 588">The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td> </tr> </tbody> </table>	If you click...	Then...	<b>Save</b>	The review will be saved and can be updated, if needed, prior to submitting the request.	<b>Complete</b>	The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.
If you click...	Then...						
<b>Save</b>	The review will be saved and can be updated, if needed, prior to submitting the request.						
<b>Complete</b>	The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.						
8.	Close the InterQual tab to return to the Provider Portal						
9.	The request line will now display a status in the <b>Decision</b> 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.

Assessments

New In Progress Completed Voided

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

Start  
Void  
Trend Report  
Print Blank Assessment

Page 1 of 1

Complete Save Save and Generate POC Cancel

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

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

Timer 00 : 00 : 09

Sample Question...

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

Step	Action												
1.	<p>Complete the following:</p> <ol style="list-style-type: none"><li><b>Document Title:</b> enter the title of the document</li><li><b>Document Type:</b> defaults to <b>Medical Document</b>, update as needed.</li><li><b>Document Description:</b> optional field</li><li>Click the <b>Browse</b> button to search for the document you wish to upload<ol style="list-style-type: none"><li>Click the desired document and click the <b>Open</b> button</li></ol></li><li>You will see the document name listed next to the <b>Browse</b> button.</li><li>You may add additional documents by selecting <b>Add</b>.</li><li>Select <b>Done</b> when you have added all documents you wish to attach.</li></ol> <div data-bbox="261 741 1474 1209"><p><b>Add Documents</b></p><p>Document Title * <input type="text" value="Additional Clinical"/></p><p>Document Type <input type="text" value="Medical Document"/></p><p>Document Description <input type="text" value="Allows 5000 characters only"/></p><p>Select Document * <input type="button" value="Browse"/> Document 2- for upload.docx</p><p><input type="button" value="Add"/></p><p>Selected Files</p><table border="1"><thead><tr><th></th><th>Document Title</th><th>Type</th><th>Date Added</th><th>Added User</th><th>Description</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>Clinical</td><td>Medical Document</td><td>10/13/2021</td><td>Williams, Jessica</td><td></td></tr></tbody></table><p><input type="button" value="Done"/></p></div>		Document Title	Type	Date Added	Added User	Description	<input type="checkbox"/>	Clinical	Medical Document	10/13/2021	Williams, Jessica	
	Document Title	Type	Date Added	Added User	Description								
<input type="checkbox"/>	Clinical	Medical Document	10/13/2021	Williams, Jessica									

## Adding a New OP Clinical Request – Adding Notes

**Notes**

Note Type: --Select One--

Note Encounter Date: 08/13/2020

Note Encounter Time: 08:49

Note Text

File Edit View Format Tools

**B** *I* U ABC ✓

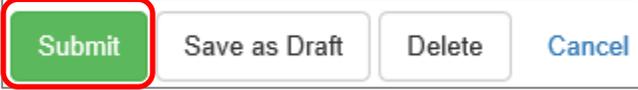
Step	Action
1.	Select the appropriate <b>Note Type</b> from the drop-down menu.
2.	Enter the appropriate notes in the notes section. Be sure to include your <b>name</b> and <b>contact information</b> in the event the Plan needs to contact you.



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 <b>Submit</b> button to submit your request.</p>  <p><b>Note:</b> The <b>Submit</b> 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><b>Note:</b> If the request is programmed to auto-approve, you will see <b>Approved</b> in the <b>Decision</b> column.</p>

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



## **7 ENTER AN OP NON-CLINICAL REQUEST**

## How to Enter an Outpatient Non-Clinical Request

---

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

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

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

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

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

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

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

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

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

Step	Action
1.	<b>Request Type:</b> defaults to <b>Expected</b> , update if appropriate
2.	<b>Request Priority:</b> defaults to <b>Standard 24</b> , update if appropriate

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

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

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

## Adding a New OP Non-Clinical Request – Adding Diagnosis

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

i **Diagnosis**

Code Type \*

Diagnosis \*

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

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

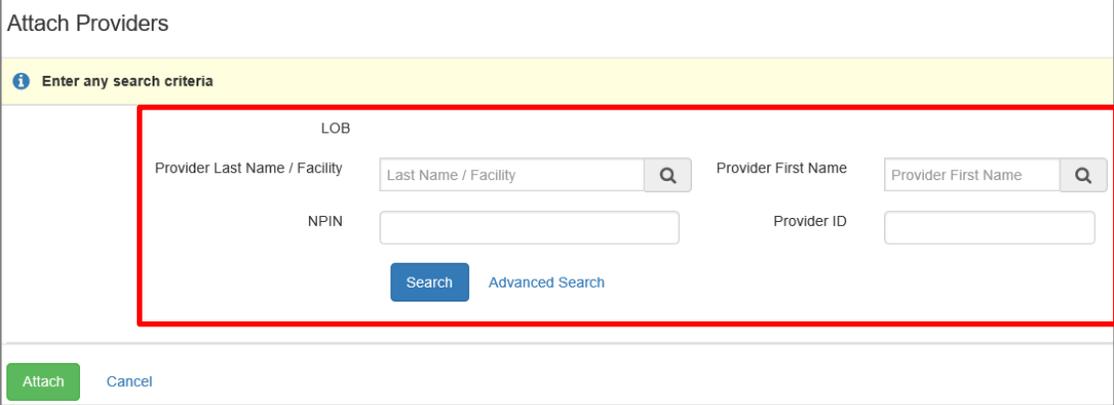
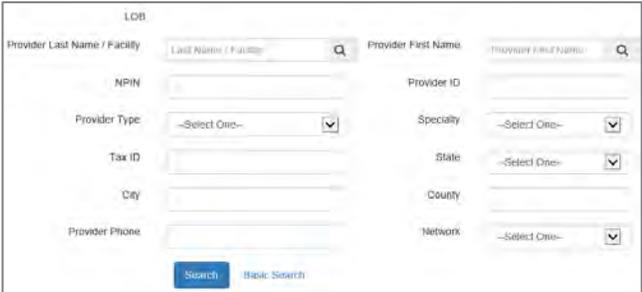
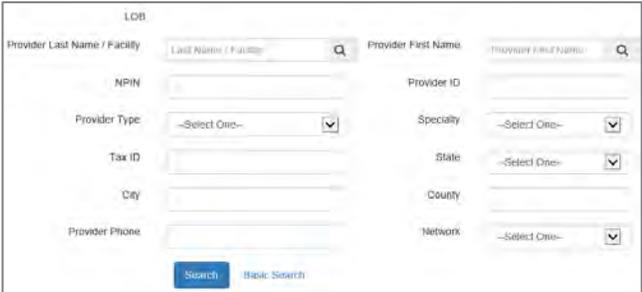
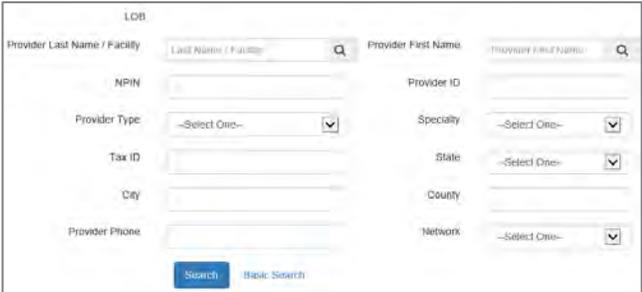
## Adding a New OP Non-Clinical Request – Adding Providers

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 <b>Attach Providers</b> button.</p> 						
2.	<p>Enter the appropriate search criteria and click on <b>Search</b>.</p> 						
3.	<p>After clicking <b>Search</b>:</p> <table border="1" data-bbox="354 1329 1463 1852"> <thead> <tr> <th data-bbox="354 1329 712 1388">If appropriate provider...</th> <th data-bbox="712 1329 1463 1388">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="354 1388 712 1446">Is displayed</td> <td data-bbox="712 1388 1463 1446">Click the <b>Attach</b> button</td> </tr> <tr> <td data-bbox="354 1446 712 1852"><i>Is not</i> displayed</td> <td data-bbox="712 1446 1463 1852"> <p>You may use the <b>Advanced Search</b> functionality and click the <b>Attach</b> button after locating the provider</p>  </td> </tr> </tbody> </table>	If appropriate provider...	Then...	Is displayed	Click the <b>Attach</b> button	<i>Is not</i> displayed	<p>You may use the <b>Advanced Search</b> functionality and click the <b>Attach</b> button after locating the provider</p> 
If appropriate provider...	Then...						
Is displayed	Click the <b>Attach</b> button						
<i>Is not</i> displayed	<p>You may use the <b>Advanced Search</b> functionality and click the <b>Attach</b> button after locating the provider</p> 						

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

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

Single Attach  
 Multiple Attach  
 Set as Favorite

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



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

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

### NOTE:

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

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

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



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

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

Step	Action																						
1.	<p>Complete information in the <b>Service Request</b> section (<i>if applicable</i>) using the guidelines outlined below:</p> <table border="1"> <tr> <td><b>Service Type</b></td> <td>Choose the appropriate selection from the drop-down list.</td> </tr> <tr> <td><b>Place of Service</b></td> <td>Choose the appropriate selection from the drop-down list.</td> </tr> <tr> <td><b>Code Type</b></td> <td>Auto-populated to CPT, update if necessary.</td> </tr> <tr> <td><b>Service Code</b></td> <td>Enter the requested service code. <b>Note:</b> 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 <b>Advanced Search</b> link to initiate a search for the service code.</td> </tr> <tr> <td><b>Modifier</b></td> <td>Enter modifier details as appropriate</td> </tr> <tr> <td><b>Start Date</b></td> <td>Enter the date of the requested service</td> </tr> <tr> <td><b>End Date</b></td> <td>Enter the end date of the service</td> </tr> <tr> <td><b>Requested #</b></td> <td>Enter the appropriate units/visits</td> </tr> </table> <p>To view these fields, you may need to click on the <b>Optional Fields</b> hyperlink.</p> <table border="1"> <tr> <td><b>Time Frame</b></td> <td>Defaults to Per Day.</td> </tr> <tr> <td><b>Time Period</b></td> <td>Defaults to 1.</td> </tr> <tr> <td><b>Units/Visits</b></td> <td>Defaults to 1. Enter the appropriate units/visits.</td> </tr> </table>	<b>Service Type</b>	Choose the appropriate selection from the drop-down list.	<b>Place of Service</b>	Choose the appropriate selection from the drop-down list.	<b>Code Type</b>	Auto-populated to CPT, update if necessary.	<b>Service Code</b>	Enter the requested service code. <b>Note:</b> 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 <b>Advanced Search</b> link to initiate a search for the service code.	<b>Modifier</b>	Enter modifier details as appropriate	<b>Start Date</b>	Enter the date of the requested service	<b>End Date</b>	Enter the end date of the service	<b>Requested #</b>	Enter the appropriate units/visits	<b>Time Frame</b>	Defaults to Per Day.	<b>Time Period</b>	Defaults to 1.	<b>Units/Visits</b>	Defaults to 1. Enter the appropriate units/visits.
<b>Service Type</b>	Choose the appropriate selection from the drop-down list.																						
<b>Place of Service</b>	Choose the appropriate selection from the drop-down list.																						
<b>Code Type</b>	Auto-populated to CPT, update if necessary.																						
<b>Service Code</b>	Enter the requested service code. <b>Note:</b> 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 <b>Advanced Search</b> link to initiate a search for the service code.																						
<b>Modifier</b>	Enter modifier details as appropriate																						
<b>Start Date</b>	Enter the date of the requested service																						
<b>End Date</b>	Enter the end date of the service																						
<b>Requested #</b>	Enter the appropriate units/visits																						
<b>Time Frame</b>	Defaults to Per Day.																						
<b>Time Period</b>	Defaults to 1.																						
<b>Units/Visits</b>	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 <b>Add</b> button.</p> <p><b>Result:</b> The Service Request line will now be populated (appears below the Service Request fields)</p> <table border="1" data-bbox="233 359 1516 600"> <thead> <tr> <th colspan="7" data-bbox="233 359 1516 405">Service Request</th> </tr> <tr> <th data-bbox="233 405 431 468">Action</th> <th data-bbox="431 405 621 468">Service Code</th> <th data-bbox="621 405 805 468">Requested#</th> <th data-bbox="805 405 964 468">Start Date</th> <th data-bbox="964 405 1118 468">End Date</th> <th data-bbox="1118 405 1299 468">Service Type</th> <th data-bbox="1299 405 1516 468">Place of Service</th> </tr> </thead> <tbody> <tr> <td data-bbox="233 468 431 531">-</td> <td data-bbox="431 468 621 531">G0493(HCPC)</td> <td data-bbox="621 468 805 531">5</td> <td data-bbox="805 468 964 531">08/17/2020</td> <td data-bbox="964 468 1118 531">09/01/2020</td> <td data-bbox="1118 468 1299 531">Home</td> <td data-bbox="1299 468 1516 531">Medical</td> </tr> <tr> <td data-bbox="233 531 431 600">-</td> <td data-bbox="431 531 621 600">S9131(HCPC)</td> <td data-bbox="621 531 805 600">14</td> <td data-bbox="805 531 964 600">08/19/2020</td> <td data-bbox="964 531 1118 600">09/02/2020</td> <td data-bbox="1118 531 1299 600">Home</td> <td data-bbox="1299 531 1516 600">Medical</td> </tr> </tbody> </table> <p><b>Note:</b> If a Service Request was added in error or with incorrect information, you may click the icon in the <b>Action</b> 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 **Documents**.

Step	Action												
1.	<p>Complete the following:</p> <ol style="list-style-type: none"><li><b>Document Title:</b> enter the title of the document</li><li><b>Document Type:</b> defaults to <b>Medical Document</b>, update as needed.</li><li><b>Document Description:</b> optional field</li><li>Click the <b>Browse</b> button to search for the document you wish to upload<ol style="list-style-type: none"><li>Click the desired document and click the <b>Open</b> button</li></ol></li><li>You will see the document name listed next to the <b>Browse</b> button.</li><li>You may add additional documents by selecting <b>Add</b>.</li><li>Select <b>Done</b> when you have added all documents you wish to attach.</li></ol> <div data-bbox="263 749 1406 1274"><p><b>Add Documents</b></p><p>Document Title * <input type="text" value="Additional Clinical"/></p><p>Document Type <input type="text" value="Medical Document"/></p><p>Document Description <input type="text" value="Allows 5000 characters only"/></p><p>Select Document * <input type="button" value="Browse"/> Document 2- for upload.docx</p><p><input type="button" value="Add"/></p><p>Selected Files</p><table border="1"><thead><tr><th></th><th>Document Title</th><th>Type</th><th>Date Added</th><th>Added User</th><th>Description</th></tr></thead><tbody><tr><td>⊖</td><td>Clinical</td><td>Medical Document</td><td>10/13/2021</td><td>Williams, Jessica</td><td></td></tr></tbody></table><p><input type="button" value="Done"/></p></div>		Document Title	Type	Date Added	Added User	Description	⊖	Clinical	Medical Document	10/13/2021	Williams, Jessica	
	Document Title	Type	Date Added	Added User	Description								
⊖	Clinical	Medical Document	10/13/2021	Williams, Jessica									

## Adding a New OP Non-Clinical Request – Adding Notes

**Notes**

Note Type: --Select One--

Note Encounter Date: 08/13/2020

Note Encounter Time: 08:49

Note Text

File Edit View Format Tools

**B** *I* U ABC

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

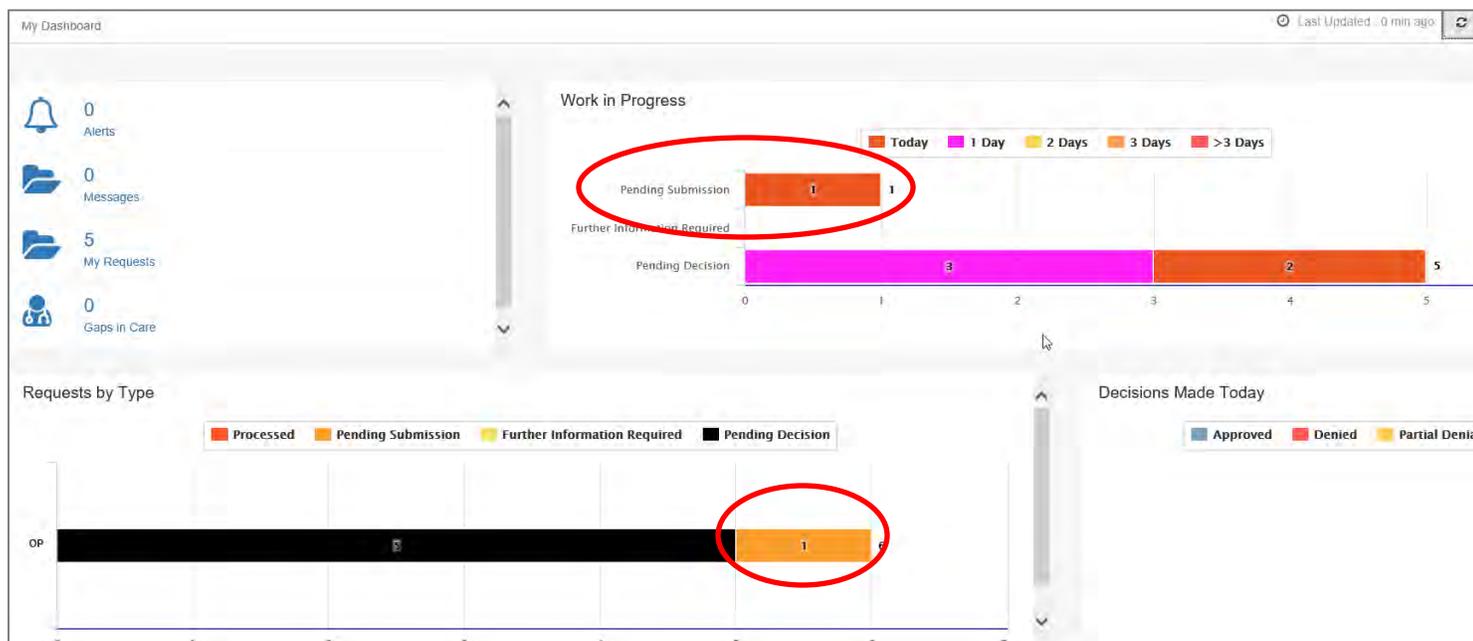


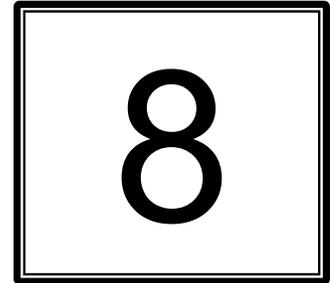
This is a shared note field. Notes can be viewed and entered by both you and the Plan.

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

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

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



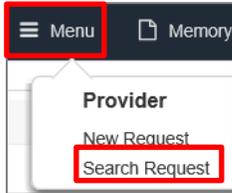
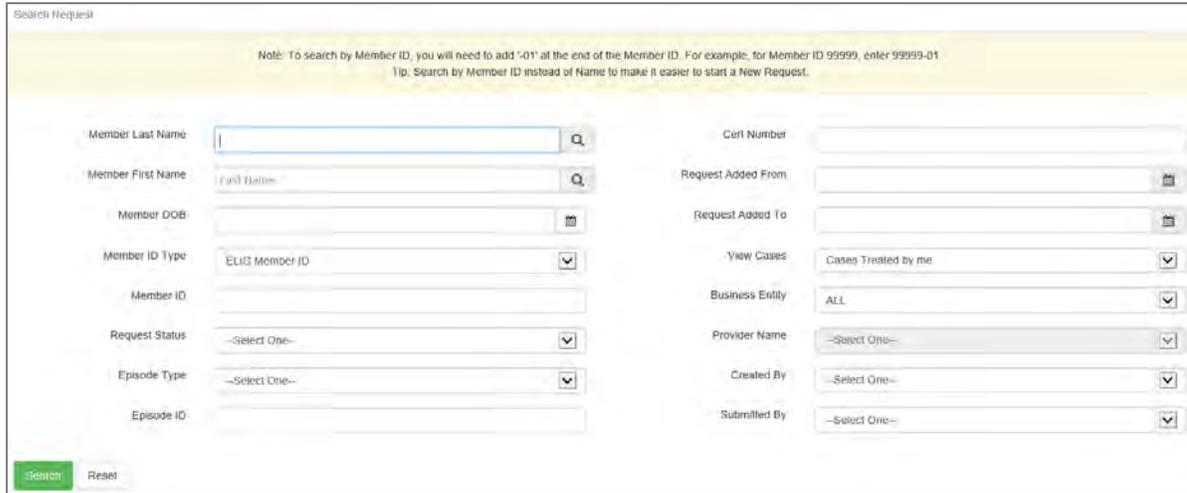


## **8 ADD CLINICAL TO AN EXISTING OP NON-CLINICAL REQUEST**

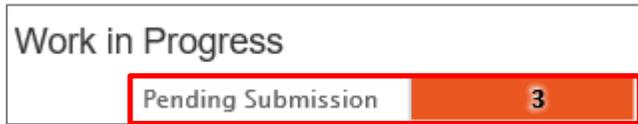
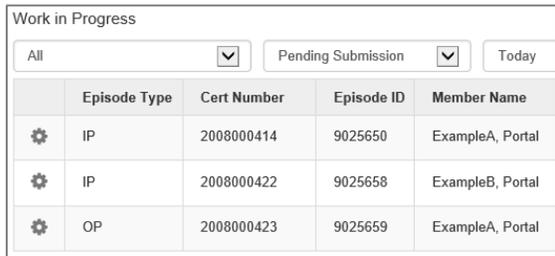
# Adding Clinical Information to an Existing OP Non-clinical Request

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

## Option #1: Search Request

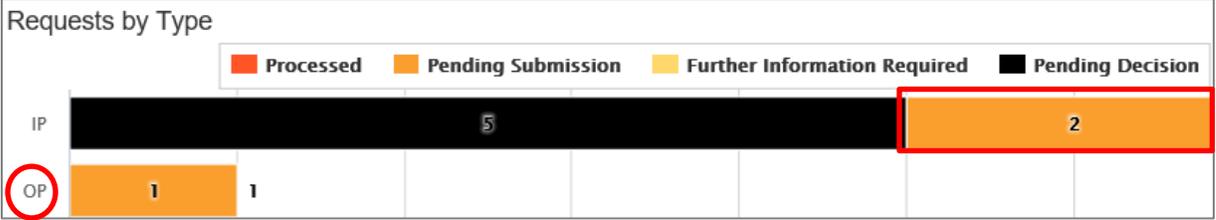
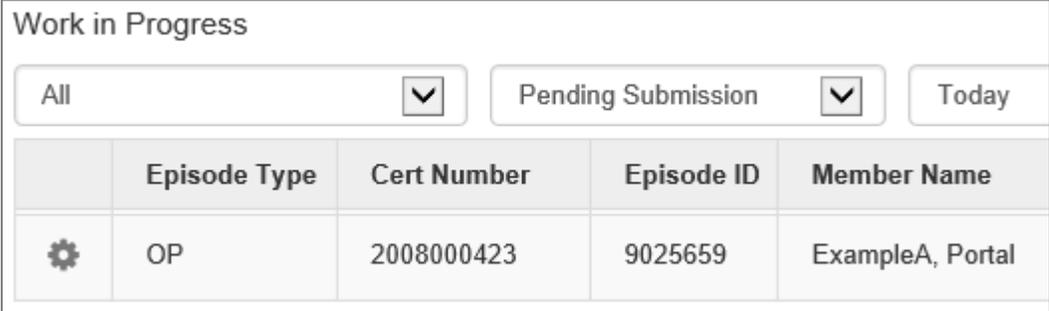
Step	Action
1.	<p>Click on <b>Menu</b> and select <b>Search Request</b></p> 
2.	<p>Enter the appropriate search criteria and click on the <b>Search</b> button.</p> 
3.	<p>What results display will be based on the refinement of the search criteria.</p> <p><b>Note:</b> Only those episodes for which you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

## Option #2: Dashboard – Work in Progress Widget

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

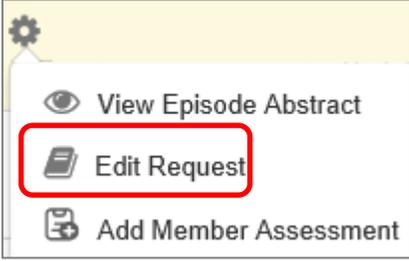
# Adding Clinical Information to Existing OP Non-Clinical Request, continued

## Option #3: Dashboard – Requests by Type Widget

Step	Action														
1.	<p>Click on the <b>Pending Submission</b> hyperlink bar in the <i>Request by Type</i> widget</p>  <p>Requests by Type</p> <p> <span style="color: red;">■</span> Processed               <span style="color: orange;">■</span> Pending Submission               <span style="color: yellow;">■</span> Further Information Required               <span style="color: black;">■</span> Pending Decision         </p> <table border="1"> <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> <td></td> </tr> </table>	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>  <p>Work in Progress</p> <p> <input type="button" value="All"/>               <input type="button" value="Pending Submission"/>               <input type="button" value="Today"/> </p> <table border="1"> <thead> <tr> <th></th> <th>Episode Type</th> <th>Cert Number</th> <th>Episode ID</th> <th>Member Name</th> </tr> </thead> <tbody> <tr> <td></td> <td>OP</td> <td>2008000423</td> <td>9025659</td> <td>ExampleA, Portal</td> </tr> </tbody> </table>		Episode Type	Cert Number	Episode ID	Member Name		OP	2008000423	9025659	ExampleA, Portal				
	Episode Type	Cert Number	Episode ID	Member Name											
	OP	2008000423	9025659	ExampleA, Portal											

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

Follow these steps to open the request for editing.

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

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

Access and complete InterQual Connect Clinical Criteria



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

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

Step	Action																										
1.	<p>Click the <b>Check for Review</b> button.</p> 																										
2.	<p>Once determined that one or both exists, you will receive the following pop-up message. Click <b>OK</b>.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>pr-jv6-ap-pp.amerihealthcaritas.com says</p> <p>There are stay/service lines to be reviewed. Kindly complete the same before submit.</p> <p style="text-align: right;"><b>OK</b></p> </div>																										
3.	<p>Click the appropriate <b>Go to Criteria</b> button.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">If...</th> <th style="width: 50%;">Then...</th> </tr> </thead> <tbody> <tr> <td>Only a <b>Stay Request</b></td> <td> <ul style="list-style-type: none"> <li>Click the <b>Go to Criteria</b> button associated with the <b>Stay Request</b>.</li> </ul> </td> </tr> <tr> <td>Both <b>Stay</b> and <b>Service Requests</b></td> <td> <ul style="list-style-type: none"> <li>The <b>Go to Criteria</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Go to Criteria</b> button associated with the <b>Service Request</b>.</li> </ul> </td> </tr> </tbody> </table> <div style="margin-top: 10px;"> <p><b>Stay Request</b></p> <p>Treatment Setting * <span>Hospital - Inpatient</span> <span>▼</span> <span style="float: right;">Actual Admit Date <span>10/12/2021</span> <span>📅</span></span></p> <p>Treatment Type <span>Medical</span> <span>▼</span></p> <p>Requested Level Of Care <span>Medical</span> <span>▼</span> <span style="float: right;">LOS Requested <span>1</span></span></p> <p>Review Status <span></span></p> <p style="text-align: center;"><b>Go to Criteria</b></p> </div> <div style="margin-top: 10px;"> <p><b>Go to Criteria</b></p> <p><b>Service Request</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Action</th> <th><input checked="" type="checkbox"/></th> <th>Service Code</th> <th>Modifier</th> <th>Requested#</th> <th>Start Date</th> <th>End Date</th> <th>Treatment Setting</th> <th>Treatment Type</th> <th>Review Status</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td>58280(CPT)</td> <td></td> <td>1</td> <td>10/15/2021</td> <td>11/15/2021</td> <td>Hospital - Inpatient</td> <td>Medical</td> <td></td> </tr> </tbody> </table> </div>	If...	Then...	Only a <b>Stay Request</b>	<ul style="list-style-type: none"> <li>Click the <b>Go to Criteria</b> button associated with the <b>Stay Request</b>.</li> </ul>	Both <b>Stay</b> and <b>Service Requests</b>	<ul style="list-style-type: none"> <li>The <b>Go to Criteria</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Go to Criteria</b> button associated with the <b>Service Request</b>.</li> </ul>	Action	<input checked="" type="checkbox"/>	Service Code	Modifier	Requested#	Start Date	End Date	Treatment Setting	Treatment Type	Review Status	<input checked="" type="checkbox"/>		58280(CPT)		1	10/15/2021	11/15/2021	Hospital - Inpatient	Medical	
If...	Then...																										
Only a <b>Stay Request</b>	<ul style="list-style-type: none"> <li>Click the <b>Go to Criteria</b> button associated with the <b>Stay Request</b>.</li> </ul>																										
Both <b>Stay</b> and <b>Service Requests</b>	<ul style="list-style-type: none"> <li>The <b>Go to Criteria</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Go to Criteria</b> button associated with the <b>Service Request</b>.</li> </ul>																										
Action	<input checked="" type="checkbox"/>	Service Code	Modifier	Requested#	Start Date	End Date	Treatment Setting	Treatment Type	Review Status																		
<input checked="" type="checkbox"/>		58280(CPT)		1	10/15/2021	11/15/2021	Hospital - Inpatient	Medical																			

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

Step	Action						
4.	<p>You will receive the following message. Click <b>OK <u>only</u></b> if you completed the items listed.</p> <div data-bbox="243 310 1084 646" style="border: 1px solid black; padding: 10px;"> <p>pr-jv6-ap-pp.amerihealthcaritas.com says</p> <p>Click OK only after all diagnoses, stay and/or service detail lines are completed. Edits are not permitted after clicking OK. Click Cancel to edit or OK to continue.</p> <div style="text-align: right;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </div> </div>						
5.	<p>The system will connect with InterQual and determine if there is a matching guideline.</p> <table border="1" data-bbox="240 751 1547 1497"> <thead> <tr> <th data-bbox="240 751 581 804">If there is...</th> <th data-bbox="581 751 1547 804">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 804 581 1171"> <p><b>Matching Guideline</b></p> </td> <td data-bbox="581 804 1547 1171"> <p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <b><i>Proceed to Step 6 in this section.</i></b></p> <div data-bbox="597 888 1239 1161" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="I50.9, G0493"/></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A  <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div> </td> </tr> <tr> <td data-bbox="240 1171 581 1497"> <p><b>No Matching Guideline</b></p> </td> <td data-bbox="581 1171 1547 1497"> <p>You will receive this pop-up. Click <b>OK</b> to close the window and you will be returned to the request screen. <b><i>Proceed to Adding Documents.</i></b></p> <div data-bbox="597 1266 1247 1486" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="J40"/></p> <p>Guideline : No matching guideline was found.</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div> </td> </tr> </tbody> </table>	If there is...	Then...	<p><b>Matching Guideline</b></p>	<p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <b><i>Proceed to Step 6 in this section.</i></b></p> <div data-bbox="597 888 1239 1161" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="I50.9, G0493"/></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A  <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div>	<p><b>No Matching Guideline</b></p>	<p>You will receive this pop-up. Click <b>OK</b> to close the window and you will be returned to the request screen. <b><i>Proceed to Adding Documents.</i></b></p> <div data-bbox="597 1266 1247 1486" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="J40"/></p> <p>Guideline : No matching guideline was found.</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div>
If there is...	Then...						
<p><b>Matching Guideline</b></p>	<p>You will receive this pop-up similar to this where you may select the appropriate guideline and click on OK. <b><i>Proceed to Step 6 in this section.</i></b></p> <div data-bbox="597 888 1239 1161" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="I50.9, G0493"/></p> <p>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A  <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div>						
<p><b>No Matching Guideline</b></p>	<p>You will receive this pop-up. Click <b>OK</b> to close the window and you will be returned to the request screen. <b><i>Proceed to Adding Documents.</i></b></p> <div data-bbox="597 1266 1247 1486" style="border: 1px solid gray; padding: 5px;"> <p>Select Guideline</p> <p>InterQual Guideline Selection</p> <p>Code : <input type="text" value="J40"/></p> <p>Guideline : No matching guideline was found.</p> <p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p> </div>						

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

Step	Action						
6.	After answering the review questions, the Recommendations page will display either <b>Criteria Met</b> or <b>Criteria Not Met</b> .						
7.	From the <b>Recommendations</b> page: <table border="1" data-bbox="240 420 1550 588"> <thead> <tr> <th data-bbox="240 420 441 466">If you click...</th> <th data-bbox="441 420 1550 466">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 466 441 512"><b>Save</b></td> <td data-bbox="441 466 1550 512">The review will be saved and can be updated, if needed, prior to submitting the request.</td> </tr> <tr> <td data-bbox="240 512 441 588"><b>Complete</b></td> <td data-bbox="441 512 1550 588">The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td> </tr> </tbody> </table>	If you click...	Then...	<b>Save</b>	The review will be saved and can be updated, if needed, prior to submitting the request.	<b>Complete</b>	The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.
If you click...	Then...						
<b>Save</b>	The review will be saved and can be updated, if needed, prior to submitting the request.						
<b>Complete</b>	The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.						
8.	Close the InterQual tab to return to the Provider Portal						
9.	The request line will now display a status in the <b>Decision</b> 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

Start  
Void  
Trend Report  
Print Blank Assessment

Page 1 of 1

Complete Save Save and Generate POC Cancel

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

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

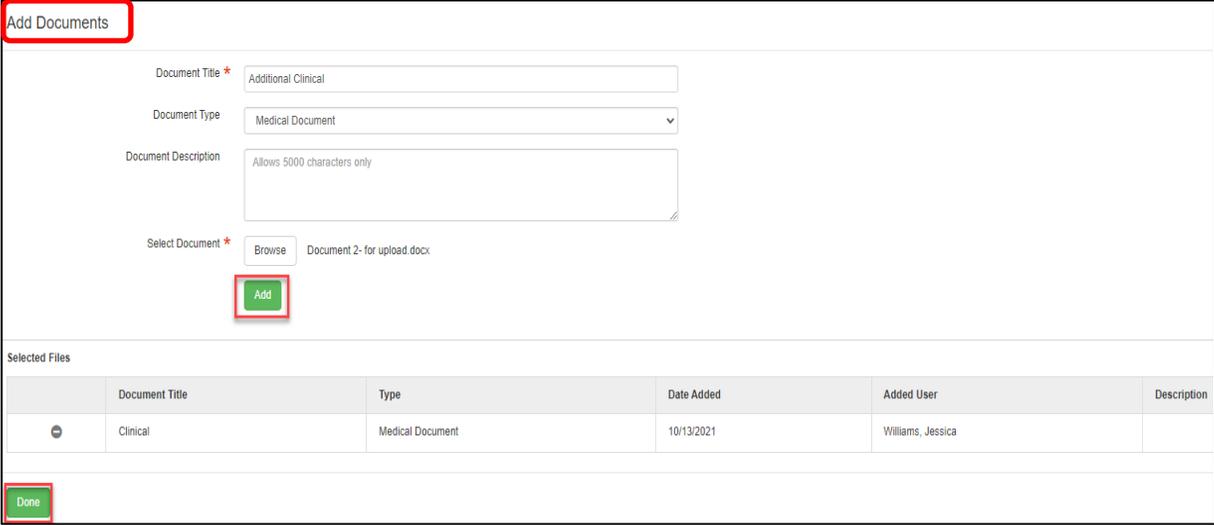
Timer 00 : 00 : 09

Sample Question...

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

Step	Action
1.	<p>Complete the following:</p> <ol style="list-style-type: none"> <li><b>Document Title:</b> enter the title of the document</li> <li><b>Document Type:</b> defaults to <b>Medical Document</b>, update as needed.</li> <li><b>Document Description:</b> optional field</li> <li>Click the <b>Browse</b> button to search for the document you wish to upload               <ol style="list-style-type: none"> <li>Click the desired document and click the <b>Open</b> button</li> </ol> </li> <li>You will see the document name listed next to the <b>Browse</b> button.</li> <li>You may add additional documents by selecting <b>Add</b>.</li> <li>Select <b>Done</b> when you have added all documents you wish to attach.</li> </ol> 

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

**Notes**

Note Type: --Select One--

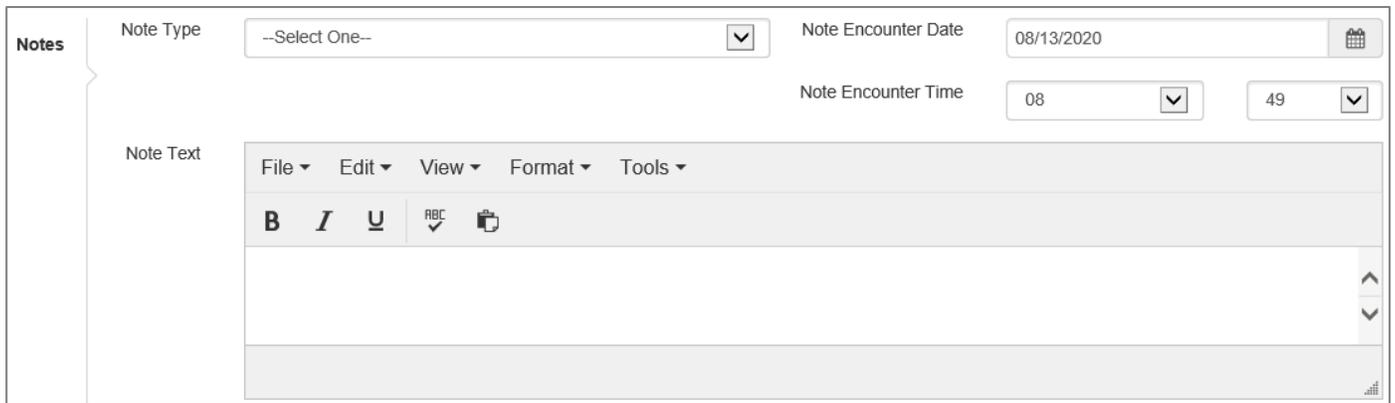
Note Encounter Date: 08/13/2020

Note Encounter Time: 08:49

Note Text

File Edit View Format Tools

**B** *I* U ABC ✓



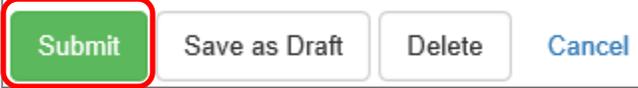
Step	Action
1.	Select the appropriate <b>Note Type</b> from the drop-down menu.
2.	Enter the appropriate notes in the notes section. Be sure to include your <b>name</b> and <b>contact information</b> in the event the Plan needs to contact you.



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 <b>Submit</b> button to submit your request.</p>  <p><b>Note:</b> The <b>Submit</b> 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><b>Note:</b> If the request is programmed to auto-approve, you will see <b>Approved</b> in the <b>Decision</b> column.</p>

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



## **9 ADDITIONAL PROCESSES**

# Search for Determination

Search Request

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

Member Last Name:

Member First Name:

Member DOB:

Member ID Type:

Member ID:

Request Status:

Episode Type:

Episode ID:

Cert Number:

Request Added From:

Request Added To:

View Cases:

Business Entity:

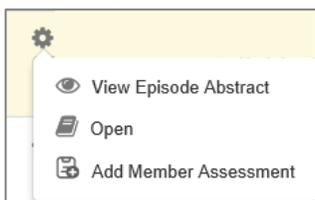
Provider Name:

Created By:

Submitted By:

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

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



## Extending an Existing Request

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

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

Search Request

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

Member Last Name:

Member First Name:

Member DOB:

Member ID Type:

Member ID:

Request Status:

Episode Type:

Episode ID:

Cert Number:

Request Added From:

Request Added To:

View Cases:

Business Entity:

Provider Name:

Created By:

Submitted By:

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

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

## Extending an Existing Request, cont.

Member Overview > IP(9026532)

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

Buttons: Review, **Extension**, Add

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

Page 1 of 1

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

**Save** Cancel

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

Requested Date \*

Request Received Time \*

Request Type \*

Request Priority \*

Time Request

Due Date

**Save** Cancel

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

Member Overview > IP(9026532)

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

Buttons: Add

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

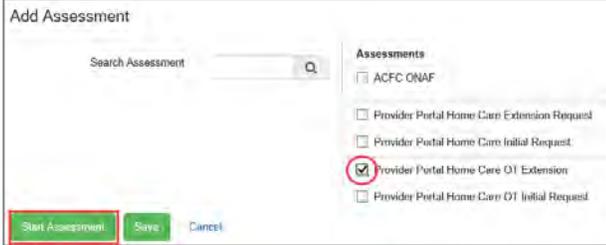
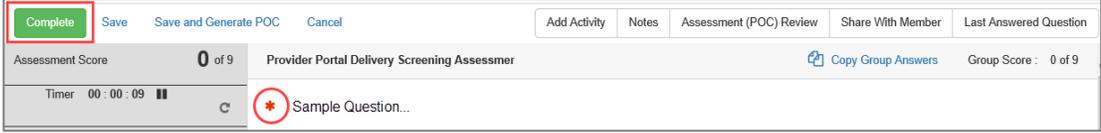
Stay Request	Treatment Type	Due Date	Decision	Reason for Decision
<input type="checkbox"/>	Initial	Medical	09/17/2020 10:05	Approved Clinical Reviewer Approval
<input type="checkbox"/>	<b>Extension</b>	Medical	09/16/2020 10:11	-



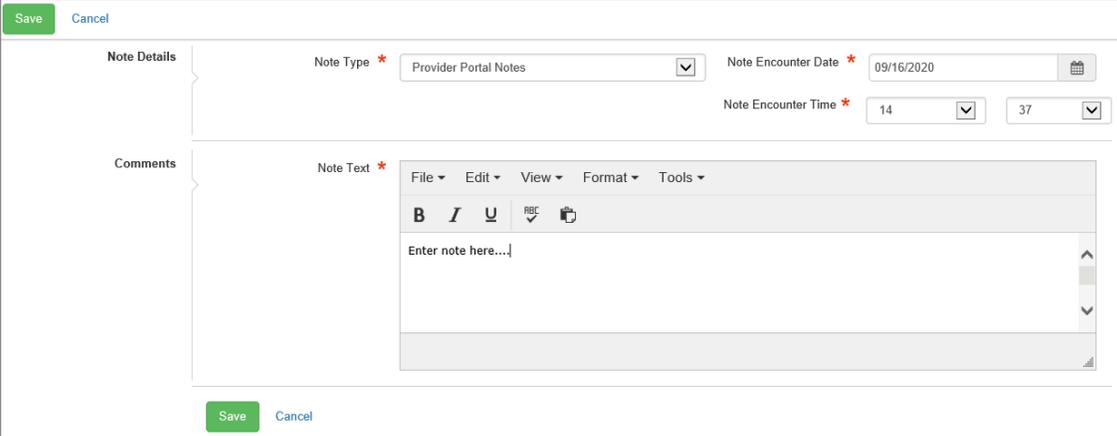
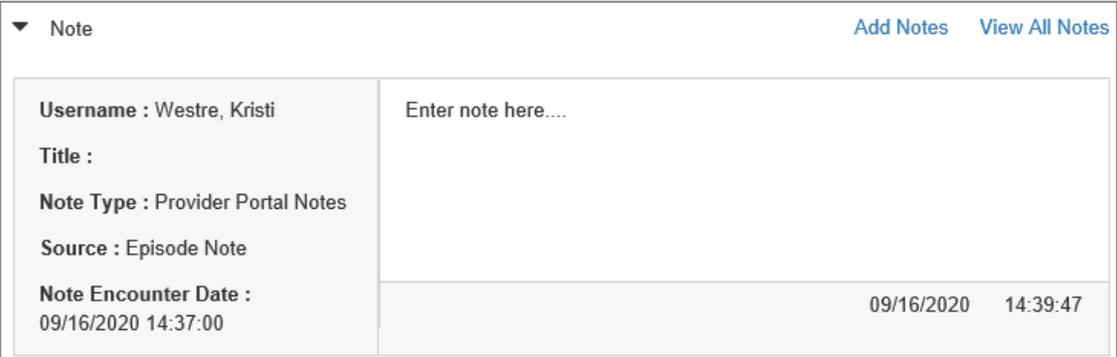
Clicking Save will submit your extension request. However, you must enter a note and attach any appropriate documentation to support the extension request.

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

## Extending an Existing Request – Adding Notes

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

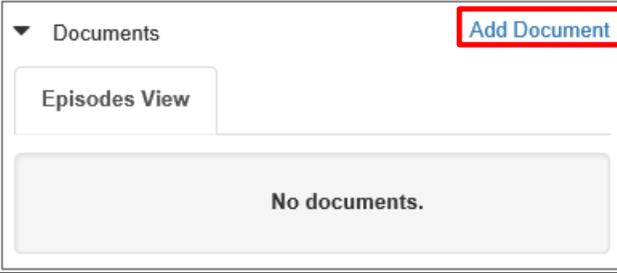


This is a shared note field. Notes can be viewed and entered by both you and the plan.

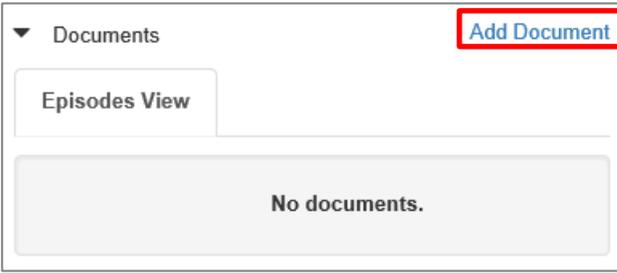
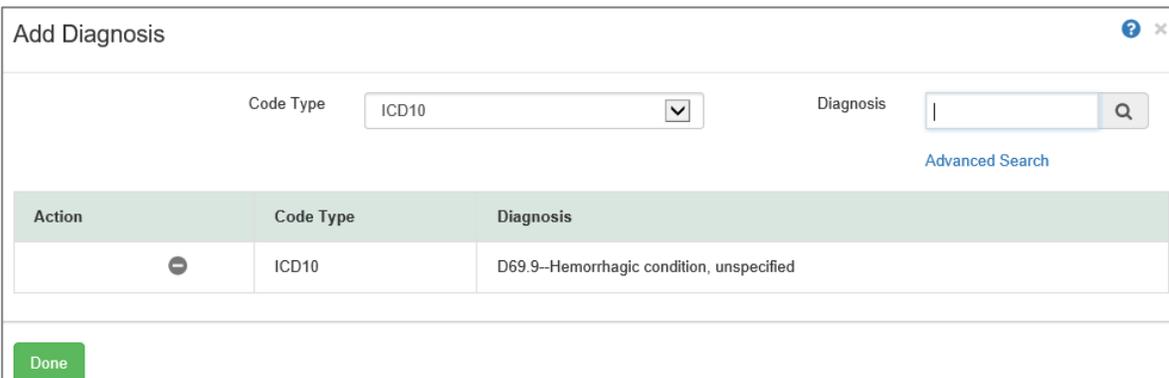
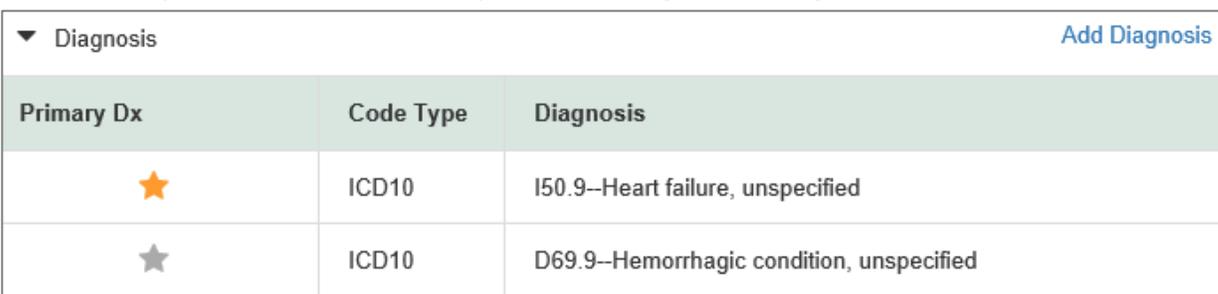
## Extending an Existing Request – Adding Documents

---

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

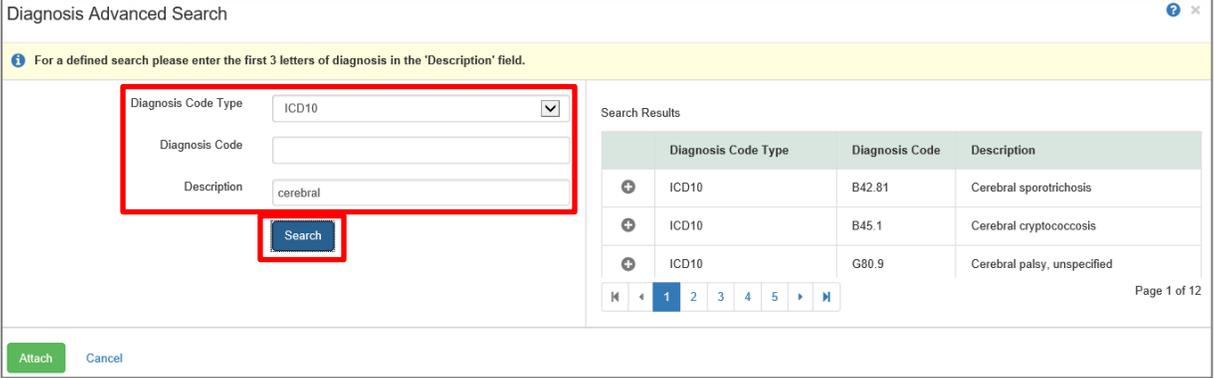
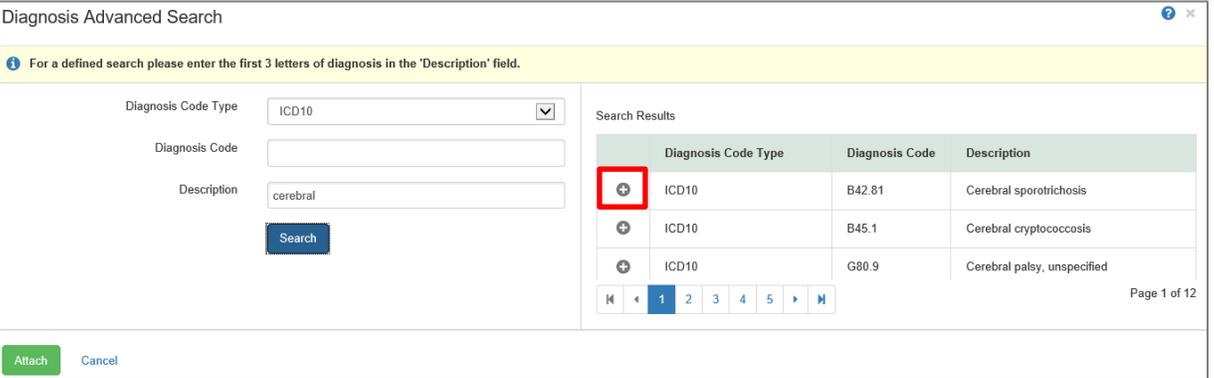
Step	Action
1.	Within the <b>Documents widget</b> on the right side of the episode screen, click on <b>Add Document</b> 
2.	Upload any clinical documentation to support the request for extension

## Add Additional Diagnoses to an Existing Request

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

## Favorite Diagnosis List – How to Create

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

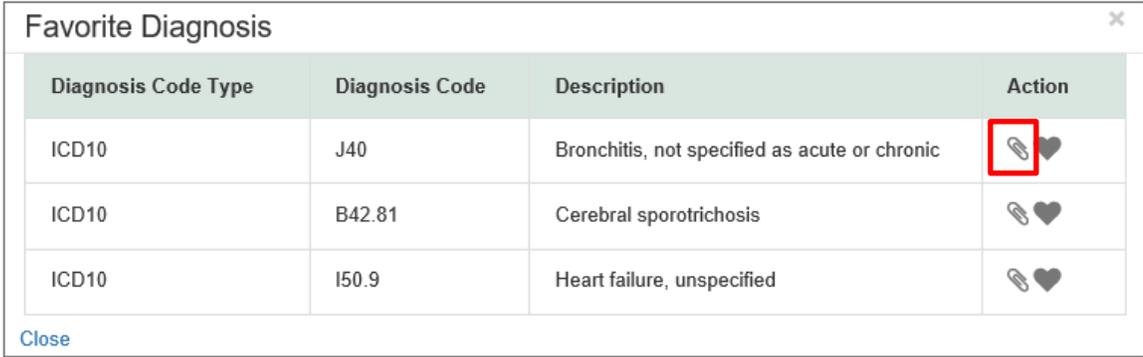
Step	Action
1.	<p>When creating an episode, click on the <b>Advanced Search</b> hyperlink to search for a diagnosis</p>  <p>The screenshot shows a form with a 'Diagnosis' section. It includes a 'Code Type' dropdown menu set to 'ICD10' and a 'Diagnosis' text input field. Below these fields are two buttons: 'Advanced Search' (highlighted with a red box) and 'Favorite Diagnosis'.</p>
2.	<p>Type the code or description in the appropriate field and click on <b>Search</b></p>  <p>The screenshot shows the 'Diagnosis Advanced Search' dialog box. It has a yellow header with a message: 'For a defined search please enter the first 3 letters of diagnosis in the 'Description' field.' Below this, there are three input fields: 'Diagnosis Code Type' (set to ICD10), 'Diagnosis Code' (empty), and 'Description' (set to cerebral). A 'Search' button is highlighted with a red box. To the right, a 'Search Results' table is visible, showing three results for ICD10 codes B42.81, B45.1, and G80.9.</p>
3.	<p>Click on the <b>+ sign</b> next to the appropriate diagnosis code</p>  <p>The screenshot shows the same 'Diagnosis Advanced Search' dialog box as in step 2. The '+ sign' next to the first search result, 'ICD10 B42.81 Cerebral sporotrichosis', is highlighted with a red box. The 'Search' button is no longer highlighted.</p>

## Favorite Diagnosis List – How to Create (cont.)

Step	Action																
4.	<p>The diagnosis will then appear in the <b>Selected Diagnosis List</b> at the bottom of the <b>Search</b> window.</p> <p><i>Tip: You may need to enlarge the search window or scroll down to see the Selected Diagnosis List section.</i></p> <div data-bbox="245 422 1563 726" style="border: 1px solid black; padding: 5px;"> <p>Selected Diagnosis List </p> <table border="1" data-bbox="253 485 1552 638"> <thead> <tr> <th></th> <th>Diagnosis Code Type</th> <th>Diagnosis Code</th> <th>Description</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">-</td> <td>ICD10</td> <td>B42.81</td> <td>Cerebral sporotrichosis</td> <td style="text-align: center;"></td> </tr> </tbody> </table> <p><span style="background-color: #28a745; color: white; padding: 2px 5px;">Attach</span> <a href="#">Cancel</a></p> </div> <table border="1" data-bbox="240 772 1544 1024" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #555; color: white;">If...</th> <th style="background-color: #555; color: white;">Then...</th> </tr> </thead> <tbody> <tr> <td>You wish to add the diagnosis to your <b>Favorite Diagnosis list</b></td> <td>Click on the <b>heart icon</b> in the <b>Action</b> column</td> </tr> <tr> <td>You wish to add the diagnosis to the episode</td> <td>Click the <b>Attach</b> 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 <b>Favorite Diagnosis list</b>	Click on the <b>heart icon</b> in the <b>Action</b> column	You wish to add the diagnosis to the episode	Click the <b>Attach</b> button
	Diagnosis Code Type	Diagnosis Code	Description	Action													
-	ICD10	B42.81	Cerebral sporotrichosis														
If...	Then...																
You wish to add the diagnosis to your <b>Favorite Diagnosis list</b>	Click on the <b>heart icon</b> in the <b>Action</b> column																
You wish to add the diagnosis to the episode	Click the <b>Attach</b> button																
5.	<p>Repeat steps 1-4 as needed or desired</p> <p><b>Note:</b> 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 <b>Favorite Diagnosis</b> hyperlink</p> 																
2.	<p>Click on the <b>Attach Icon</b> (paperclip) to add the diagnosis to the request.</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.

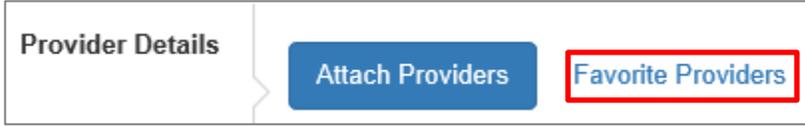
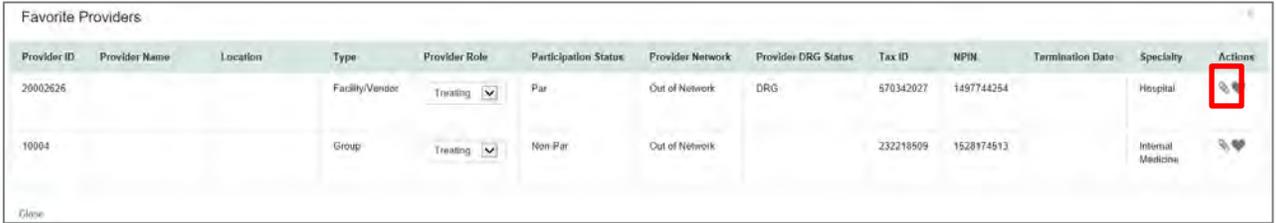
## Favorite Providers List – How to Create

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

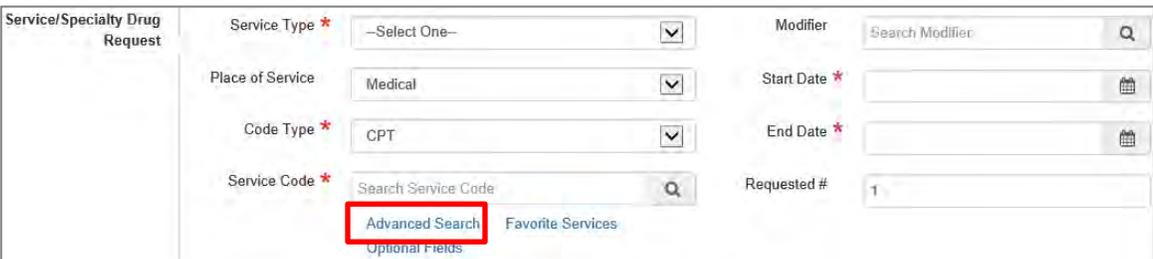
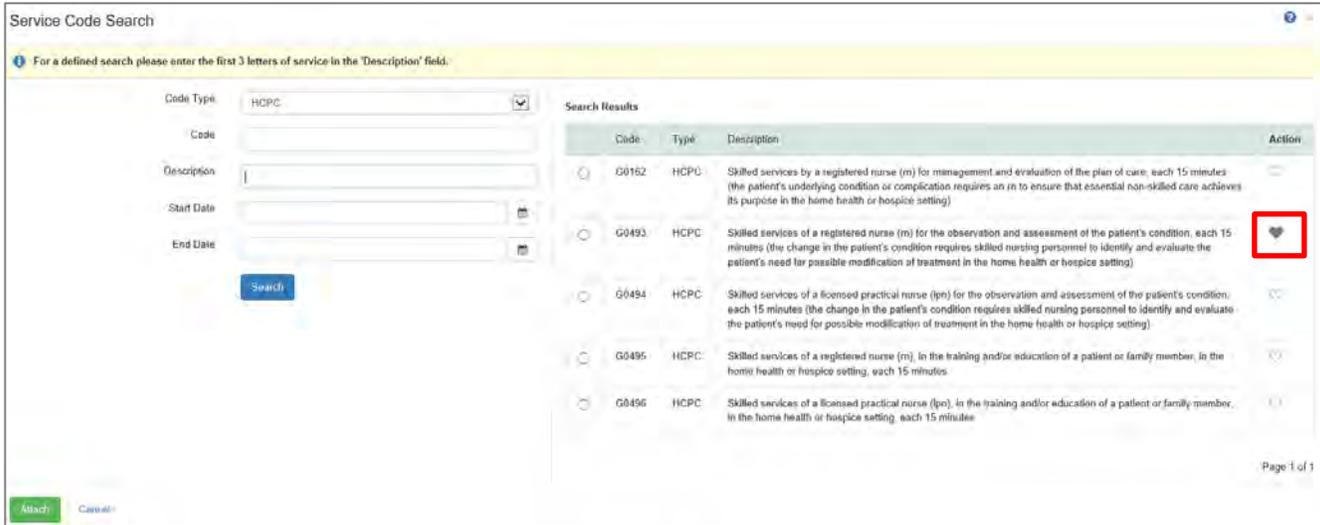
Step	Action
1.	<p>When creating an episode, click on the <b>Favorite Providers</b> hyperlink</p> 
2.	<p>Click on the <b>Attach Icon</b> (paperclip) to add the provider to the request.</p> 



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

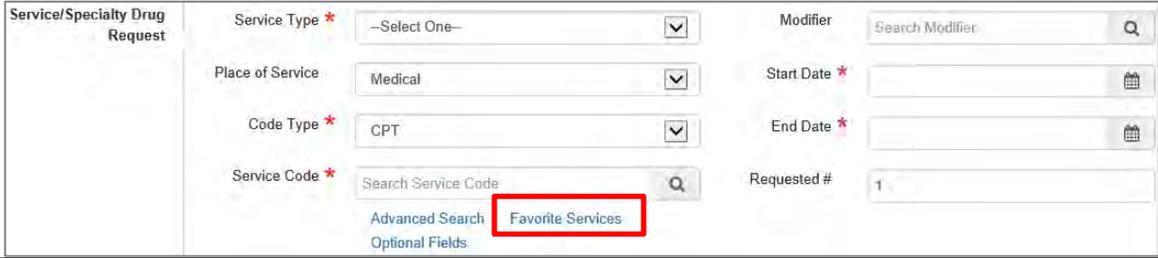
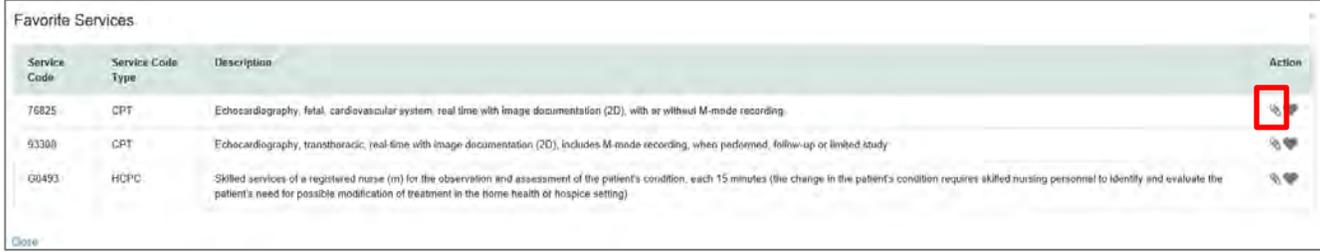
## Favorite Services List – How to Create

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 <b>Advanced Search</b> hyperlink</p> 
2.	<p>Enter the appropriate criteria from the Basic Search screen or from the Advanced Search screen and click on <b>Search</b></p>
3.	<p>The service(s) will then appear in the <b>Search Results</b> section Click on the <b>heart icon</b> to add the service as a favorite.</p> 

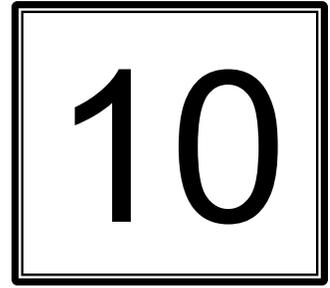
## Favorite Services List – Utilizing the List

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 <b>Favorite Services</b> hyperlink</p>  <p>The screenshot shows a form titled "Service/Specialty Drug Request" with several fields: "Service Type" (dropdown menu), "Place of Service" (dropdown menu), "Code Type" (dropdown menu), "Service Code" (search field), "Modifier" (search field), "Start Date" (calendar icon), "End Date" (calendar icon), and "Requested #" (text input). Below the "Service Code" field, there are two links: "Advanced Search" and "Favorite Services", which is highlighted with a red rectangular box.</p>
2.	<p>Click on the <b>Attach Icon</b> (paperclip) to add the service code to the request.</p>  <p>The screenshot shows a table titled "Favorite Services" with columns: "Service Code", "Service Code Type", "Description", and "Action". The first row is highlighted. The "Action" column contains a paperclip icon (highlighted with a red box), a heart icon, and a trash can icon. The second row also has a heart icon and a trash can icon. The third row has a heart icon and a trash can icon. A "Close" button is visible at the bottom left of the table.</p>



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



## **10 RESOURCES**

## Plan Contact Information

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

## Escalation Process and Training Requests – Account Executives and Providers

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