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Solutions for the Underserved  
and Chronically Ill.

# Provider Portal Participant Guide

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Corporate Clinical Systems Training Department

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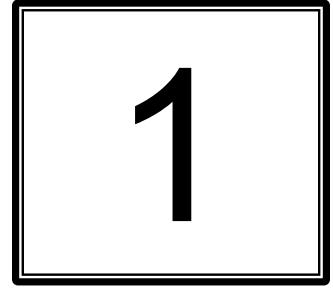
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# TABLE OF CONTENTS

<b>1 LOGGING IN TO THE PROVIDER PORTAL .....</b>	<b>4</b>
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
<b>2 SEARCHING FOR A MEMBER.....</b>	<b>12</b>
Searching for a Member – Search Request Tab.....	13
Searching for a Member – New Request Tab .....	14
<b>3 ENTER AN IP CLINICAL REQUEST .....</b>	<b>15</b>
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
<b>4 ENTER AN IP NON-CLINICAL REQUEST .....</b>	<b>31</b>
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
<b>5 ADD CLINICAL TO AN EXISTING IP NON-CLINICAL REQUEST .....</b>	<b>43</b>

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?**

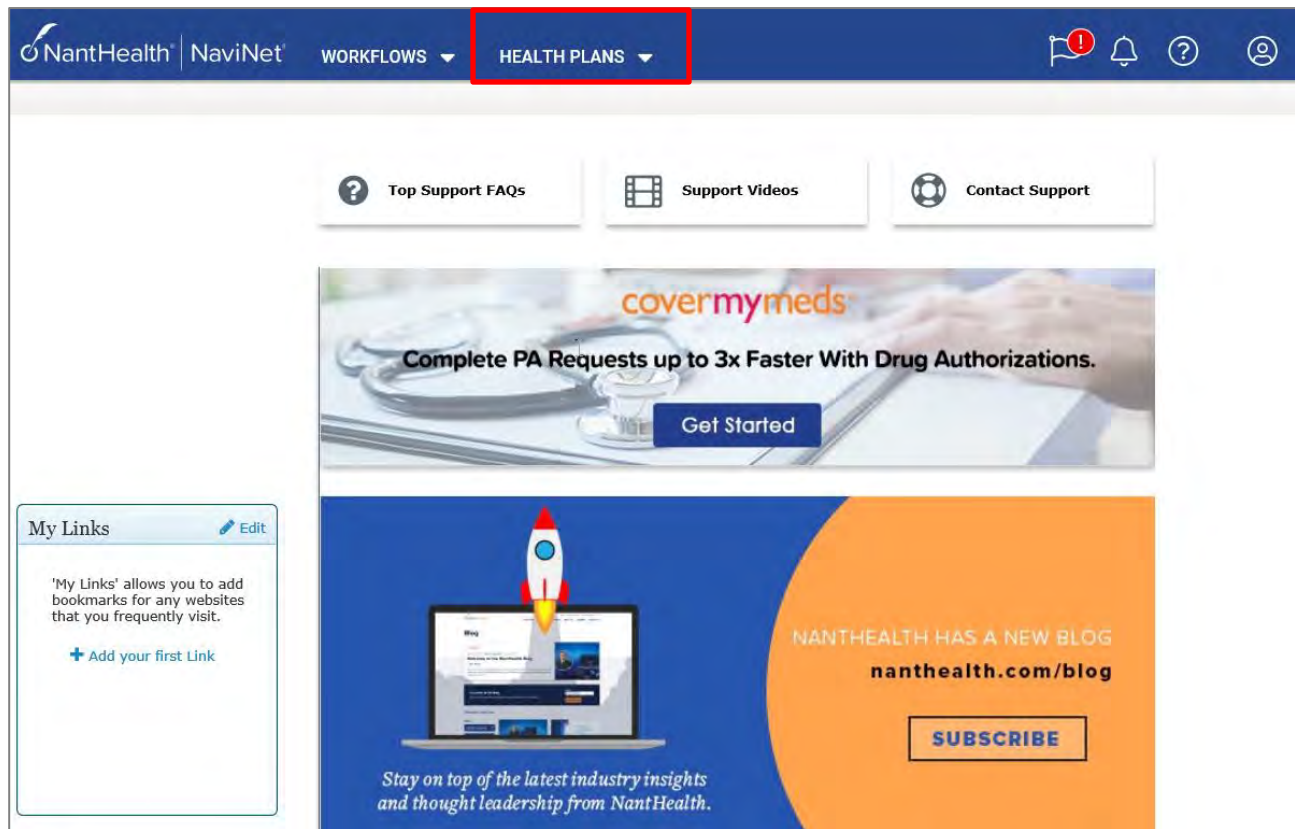
HIPAA guidelines prohibit users from sharing login information. If you are sharing login credentials, please contact your NaviNet Security Officer to be added as a user. Don't know the name of your Security Officer? Log in and go to **My Account** and click **My Security**. There is no additional charge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

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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> The NaviNet Home screen will be displayed

## Logging in to Provider Portal



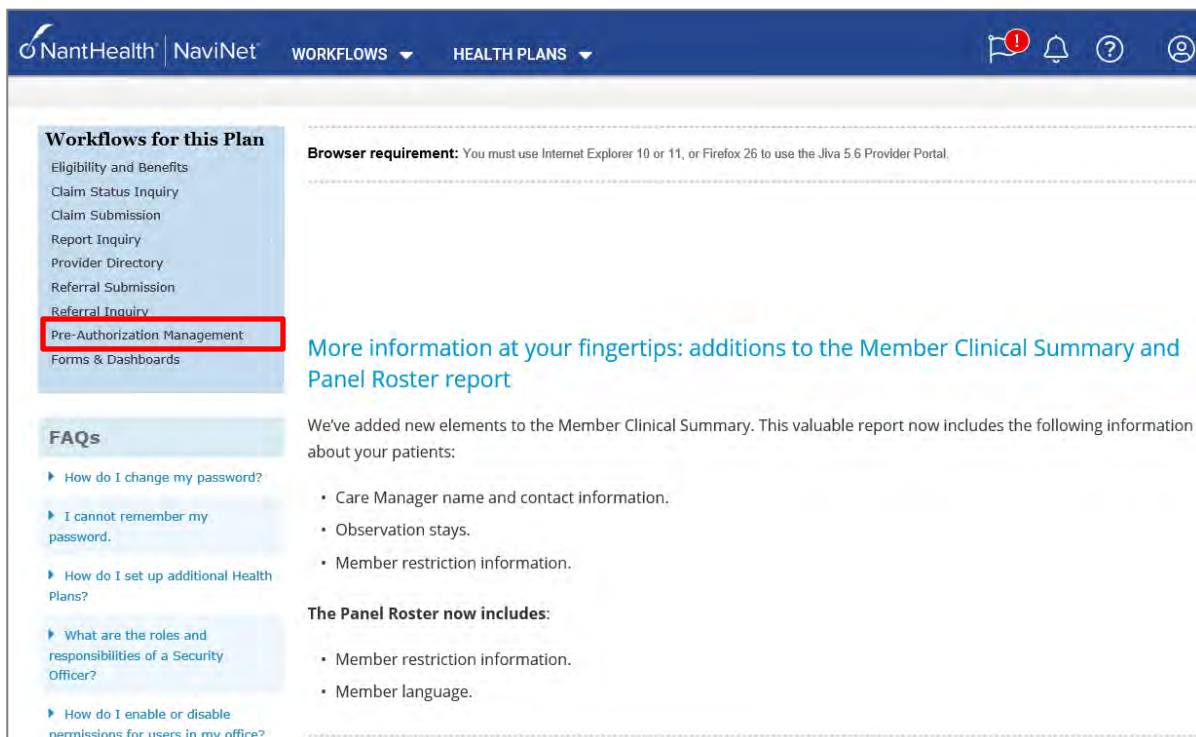
The NaviNet Home Page is not Health Plan-specific.

To locate your Health Plan:

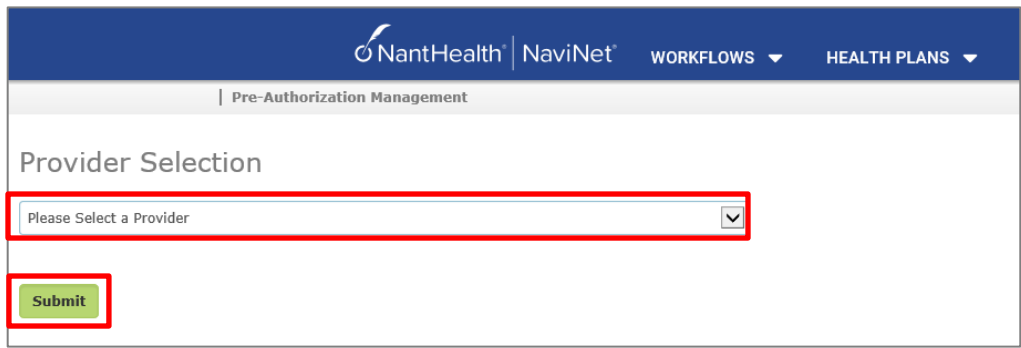
Step	Action
1.	Click on <b>HEALTHPLANS</b> in the top menu
2.	Select the appropriate <b>health plan</b> from the drop down list
	<b>Result:</b> The Health Plan-specific Home page will display

## 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

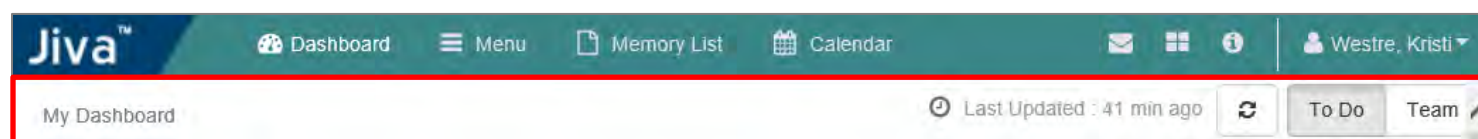
The dashboard consists of widgets (*or panels*) that help you to access the tasks that are assigned to you. It also provides high-level information about the episodes and activities assigned to you.

### Application Banner



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

### My Dashboard Banner







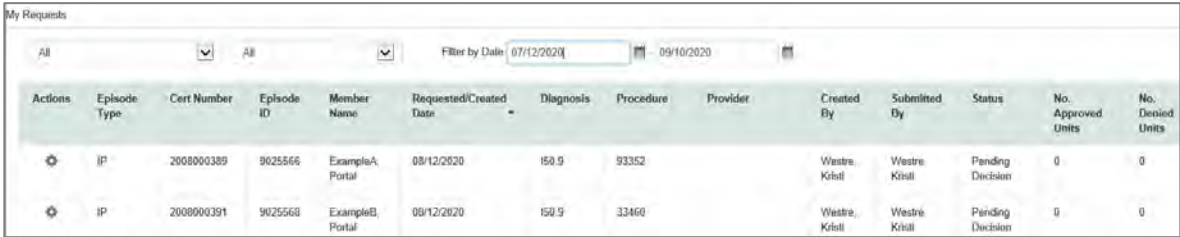
Item	Description
Last Updated	Displays the last time the Dashboard was updated
Refresh	Click the Refresh icon to update the Dashboard to view the most current information.
To Do	Displays the widgets containing information regarding episodes associated with you.
Team	Displays the widgets containing information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

## Overview of the Dashboard: To-Do View

These widgets contain information regarding the episodes associated with you.

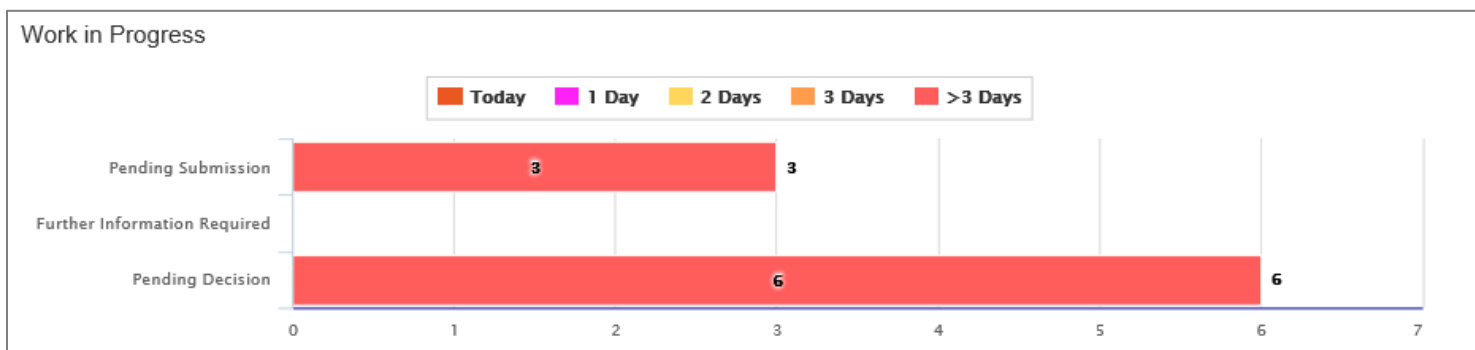
### Information Widget

	0 Alerts
	0 Messages
	7 My Requests
	0 Gaps in Care

Item	Description
<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

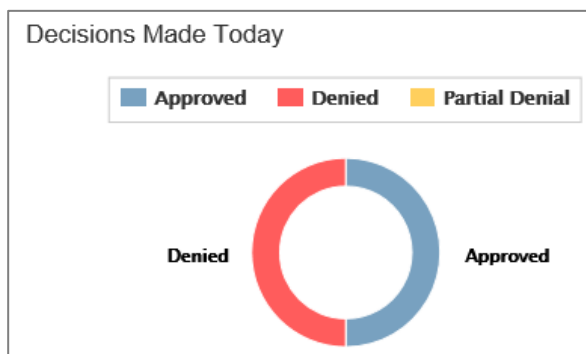
### Requests by Type Widget

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.

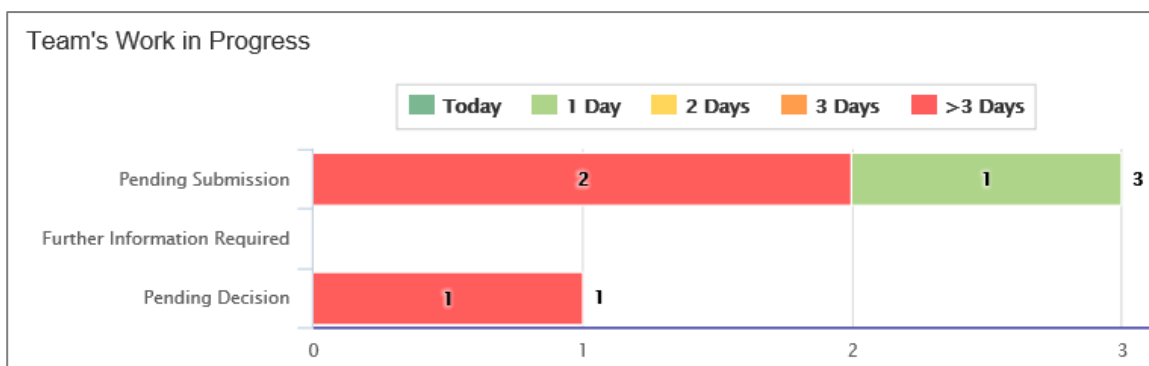
### Team Members Widget

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.



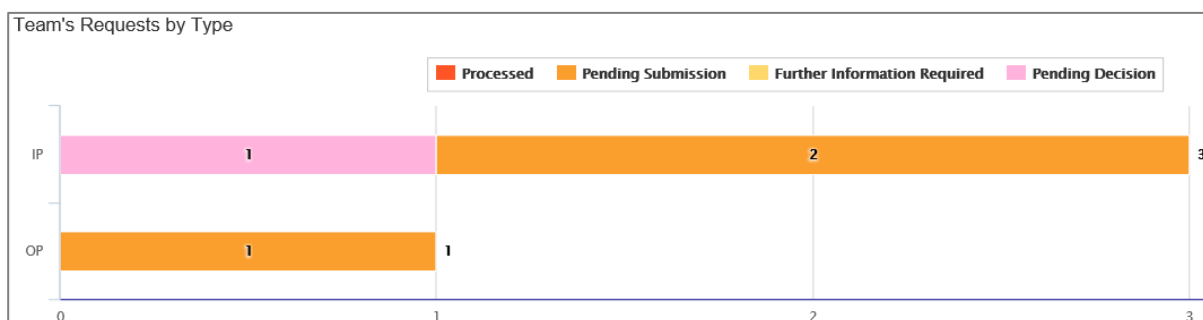
### Team's Work in Progress Widget

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

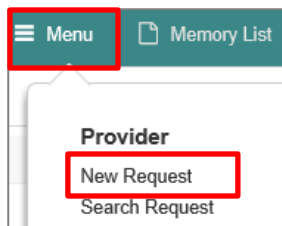
It is recommended that you search for a possible duplication before entering a request. Conducting the search using **Search Request** allows you to view existing requests for a member.

	<b>Duplicate Case Check and Alert</b>
<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> <div><div><div>Menu</div><div>Memory List</div></div><div><div>Provider</div><div>New Request</div><div>Search Request</div></div></div>																																							
2.	<p>Search by one of the following:</p> <table><tr><th>Search Information</th><th>Description</th></tr><tr><td>Member ID</td><td>Member ID Type: defaults to ELIG Member ID which is their health plan ID. You will need to enter <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></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																															
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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><tr><th>Action</th><th>Episode ID</th><th>Member Name</th><th>Episode Type</th><th>Date of Service</th><th>Cert Number</th><th>Diagnosis</th><th>Created By</th><th>Submitted By</th><th>Initial Due Date</th><th>Status</th><th>Decision</th><th>Decision Reason</th></tr><tr><td></td><td>9025648</td><td>ExampleA, Portal</td><td>IP</td><td>08/13/2020</td><td>2008000412</td><td>M13.169 ( Monoarthritis, not elsewhere classified, unspecified knee )</td><td>Westre, Kristi</td><td>Westre, Kristi</td><td></td><td>Processed</td><td>Approved</td><td>Clinical Reviewer Approval</td></tr><tr><td></td><td>9026454</td><td>ExampleA, Portal</td><td>IP</td><td>09/10/2020</td><td>92009000124</td><td>R69 ( Illness, unspecified )</td><td>Westre, Kristi</td><td></td><td></td><td>Pending Submission</td><td></td><td></td></tr></table> <div><div>Add New Request</div><div></div></div>	Action	Episode ID	Member Name	Episode Type	Date of Service	Cert Number	Diagnosis	Created By	Submitted By	Initial Due Date	Status	Decision	Decision Reason		9025648	ExampleA, Portal	IP	08/13/2020	2008000412	M13.169 ( Monoarthritis, not elsewhere classified, unspecified knee )	Westre, Kristi	Westre, Kristi		Processed	Approved	Clinical Reviewer Approval		9026454	ExampleA, Portal	IP	09/10/2020	92009000124	R69 ( Illness, unspecified )	Westre, Kristi			Pending Submission		
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## 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>

New Request

Member Last Name  Client

Member First Name  Member ID Type

Member DOB  Member ID \*

Step	Action
1.	Enter the Member ID in the <b>Member ID</b> field.
	<div>  <p>When searching by <b>Member ID</b> you must enter “-01” at the end of the Member ID.</p> </div>
2.	Click the <b>Search</b> button to search for the member.
	<p><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.</p>

New Request

Member Last Name  Client

Member First Name  Member ID Type

Member DOB  Member ID \*

	Jiva Member ID	Member Name	Member Date of Birth	Gender	Member ID	Coverage Start Date	Coverage End Date	Group Name	Action
		ExampleA, Portal	04/19/1966	F		01/01/2004	12/31/9999		Add Request <input type="button" value="v"/>



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



## How to Enter an Inpatient Clinical Request

---

When entering a request you have 2 options:

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

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

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

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



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

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

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

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

The screenshot shows the Jiva portal interface. At the top, there's a navigation bar with 'Jiva' logo and links to Dashboard, Menu, Memory List, and Calendar. Below this is a member information bar with fields like 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 on the right side of the member information bar. Below this is the 'Inpatient Request' form. The form has a left sidebar with 'Episode Details' selected. The main area contains fields for 'Request Type' (dropdown), 'Request Priority' (dropdown), and 'Admit Type' (dropdown). A red circle highlights a hyperlink labeled 'Optional Fields' at the bottom of the form.

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.

The screenshot shows the 'Inpatient Request' form with the 'Optional Fields' section expanded. The 'Time Request' field is a text input, and the 'Reason for Request' field is a dropdown menu. A red box highlights these two fields.

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

## Adding a New IP Clinical Request – Adding Diagnosis

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

**Diagnosis**

Code Type \*

ICD10
















▼

Diagnosis \*

Diagnosis

Q

[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><tr><th>Primary Dx</th><th>Code Type</th><th>Diagnosis</th><th>Actions</th></tr><tr><td></td><td>ICD10</td><td>I50.9--Heart failure, unspecified</td><td></td></tr><tr><td></td><td>ICD10</td><td>R69--Illness, unspecified</td><td></td></tr></table>	Primary Dx	Code Type	Diagnosis	Actions		ICD10	I50.9--Heart failure, unspecified			ICD10	R69--Illness, unspecified	
Primary Dx	Code Type	Diagnosis	Actions										
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	ICD10	R69--Illness, unspecified											
4.	<table><tr><th>If you...</th><th>Then...</th></tr><tr><td>want to add additional diagnoses</td><td>Repeat steps 2 and 3.  <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></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.						
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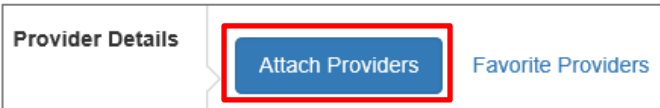
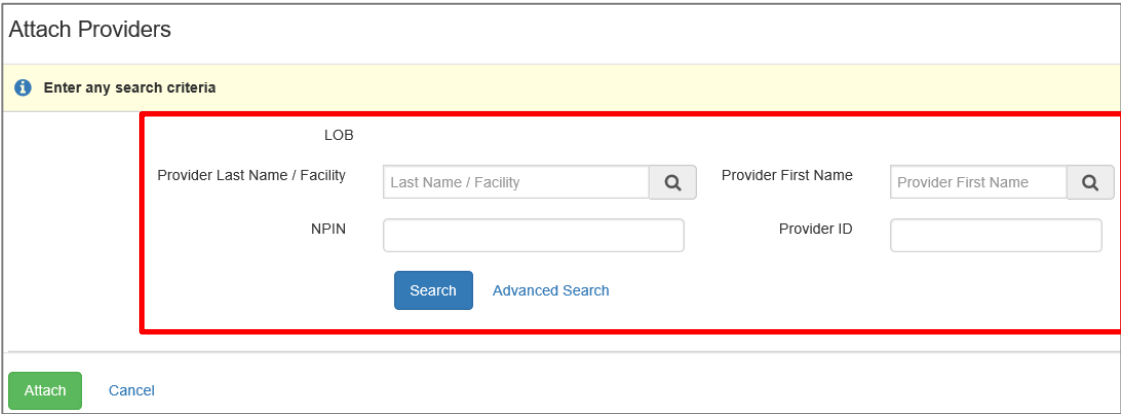
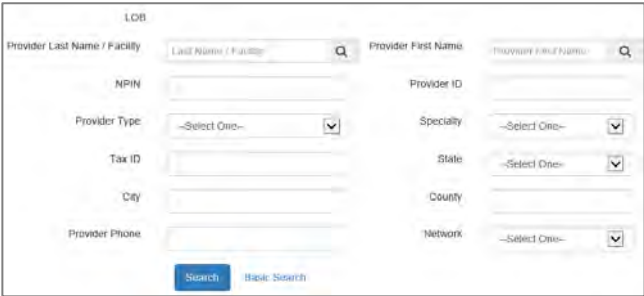
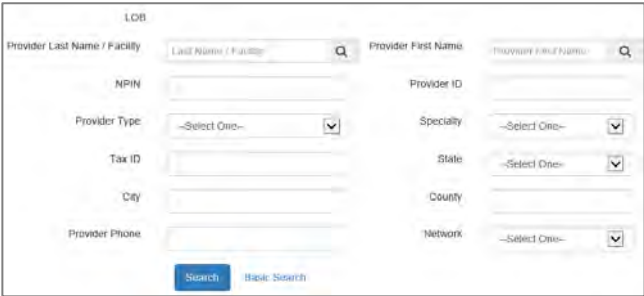
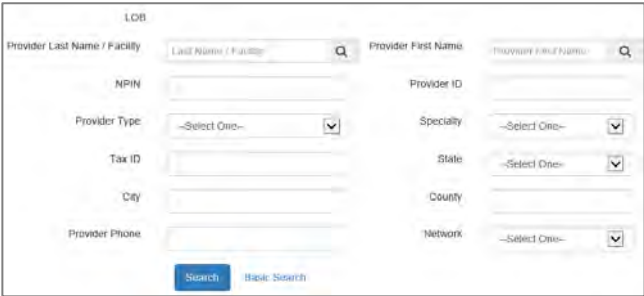
## Adding a New IP Clinical Request – Adding Providers

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"> <thead> <tr> <th>If appropriate provider...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Is displayed</td><td>Proceed to Step 4.</td></tr> <tr> <td><i>Is not</i> displayed</td><td> <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  <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>Attending</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...
<b><u>Attach multiple providers to an episode at the same time</u></b>	<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
		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="402 546 1380 959" data-label="Form"> </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
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<b>Start Date</b>	Defaults to match the Actual Admit date, update as needed																						
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<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><tr><th colspan="9">Service Request</th></tr><tr><th>Action</th><th><input type="checkbox"/></th><th>Service Code</th><th>Requested#</th><th>Start Date</th><th>End Date</th><th>Service Type</th><th>Place of Service</th><th>Review Status</th></tr><tr><td></td><td></td><td>93352(CPT)</td><td>1</td><td>08/12/2020</td><td>08/13/2020</td><td>Inpatient</td><td>Medical</td><td></td></tr></table> <p><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

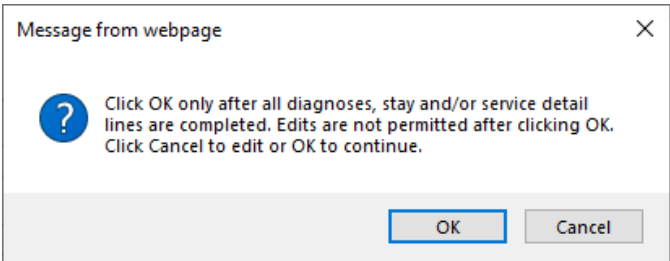
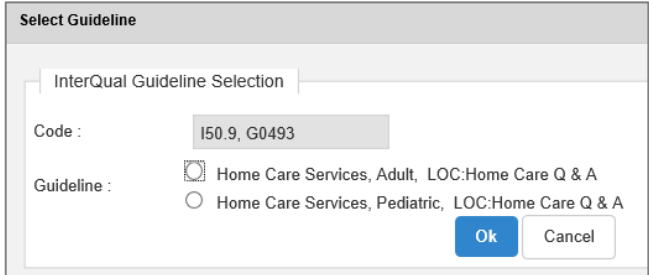
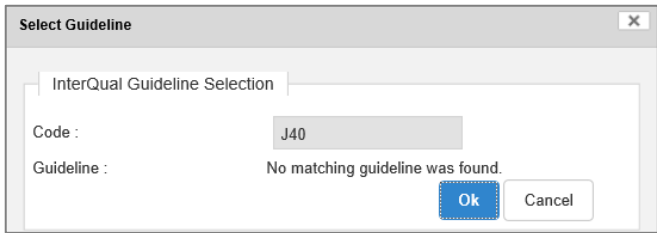
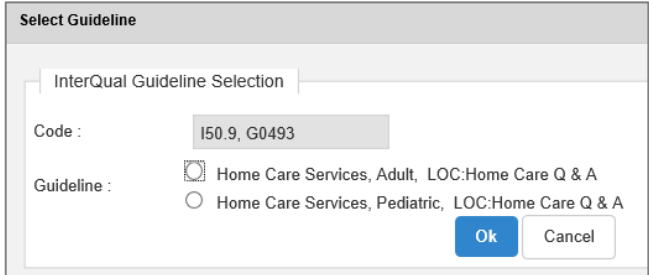
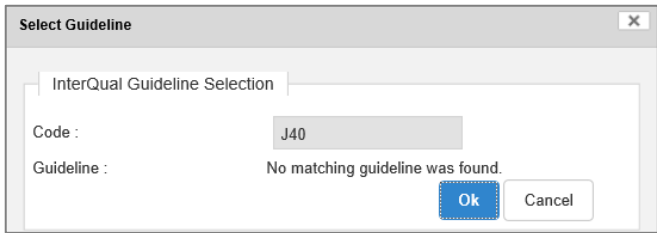
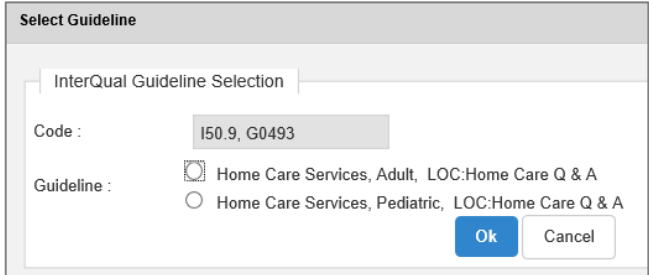
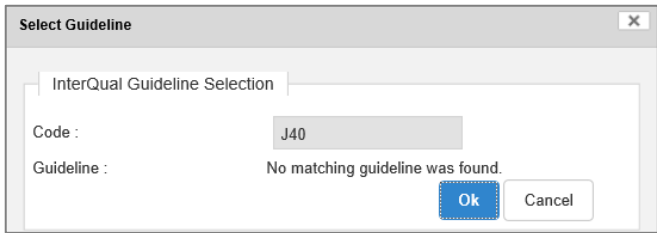


*If you need training or have questions regarding the use of InterQual Connect criteria, please contact your facility InterQual trainer or contact your Change HealthCare account representative.*

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

Step	Action																								
1.	Click the <b>Check for Review</b> button. <div>Check For Review</div>																								
2.	Once determined that one or both exists, you will receive the following pop-up message. Click <b>OK</b> . <div>Message from webpage There are stay/service lines to be reviewed. Kindly complete the same before submit. OK Cancel</div>																								
3.	Click the appropriate <b>Review</b> button. <table><tr><th>If...</th><th>Then...</th></tr><tr><td>Only a <b>Stay Request</b></td><td><ul style="list-style-type: none"><li>Click the <b>Review</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>Review</b> button associated with the Stay Request will be inactive.</li><li>Click the <b>Review</b> button associated with the <b>Service Request</b>.</li></ul></td></tr></table> <div><div>Stay Request</div><div>Service Type: Inpatient, Actual Admit Date: 08/12/2020, Place of Service: Medical, Requested Level Of Care: --Select One--, LOS Requested: 1, Review Status: Review</div><div>Review</div></div> <div><div>Review</div><div>Service Request</div><table><tr><th>Action</th><th></th><th>Service Code</th><th>Requested#</th><th>Start Date</th><th>End Date</th><th>Service Type</th><th>Place of Service</th><th>Review Status</th></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td>93352(CPT)</td><td>1</td><td>08/12/2020</td><td>08/13/2020</td><td>Inpatient</td><td>Medical</td><td></td></tr></table></div>	If...	Then...	Only a <b>Stay Request</b>	<ul style="list-style-type: none"><li>Click the <b>Review</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>Review</b> button associated with the Stay Request will be inactive.</li><li>Click the <b>Review</b> button associated with the <b>Service Request</b>.</li></ul>	Action		Service Code	Requested#	Start Date	End Date	Service Type	Place of Service	Review Status		<input checked="" type="checkbox"/>	93352(CPT)	1	08/12/2020	08/13/2020	Inpatient	Medical	
If...	Then...																								
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Action		Service Code	Requested#	Start Date	End Date	Service Type	Place of Service	Review Status																	
	<input checked="" type="checkbox"/>	93352(CPT)	1	08/12/2020	08/13/2020	Inpatient	Medical																		

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

Step	Action						
4.	<p>You will receive the following message. Click <b>OK <u>only</u></b> if you completed the items listed.</p>  <p><b>Result:</b> The system will run a diagnostic review of the request to determine if a <b>Stay Request</b> and/or a <b>Service Request</b> is associated with it.</p>						
5.	<table border="1"> <thead> <tr> <th>If there is...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td><b>Matching Guideline</b></td><td> <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>  </td></tr> <tr> <td><b>No Matching Guideline</b></td><td> <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>  </td></tr> </tbody> </table>	If there is...	Then...	<b>Matching Guideline</b>	<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> 	<b>No Matching Guideline</b>	<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> 
If there is...	Then...						
<b>Matching Guideline</b>	<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> 						
<b>No Matching Guideline</b>	<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> 						

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

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

## Adding a New IP Clinical Request – Adding Notes

Notes

Note Type

--Select One--

▼

Note Encounter Date

08/13/2020

📅

Note Encounter Time

08

▼

49

▼

Note Text

File ▼ Edit ▼ View ▼ Format ▼ Tools ▼

**B**

*I*

U

ABC ✓

📎

⬆

⬇

⬆

Step	Action
1.	Select the appropriate <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> <div> <span>Submit</span> <span>Save as Draft</span> <span>Delete</span> <span>Cancel</span> </div> <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
	12548538	27428(CPT)	1	0	0			Inpatient	Per Day
									Decision
									Pending



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



## How to Enter an Inpatient Non-Clinical Request

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

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

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

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

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

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

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

The screenshot shows the Jiva portal interface. At the top, there's a navigation bar with 'Jiva' logo and links for Dashboard, Menu, Memory List, and Calendar. Below this is a member information header 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 on the right side of the header. Below the header is the 'Inpatient Request' section. On the left, there's a sidebar with 'Episode Details' selected. The main form area contains three dropdown menus: 'Request Type' (with a red asterisk), 'Request Priority' (with a red asterisk), and 'Admit Type'. A red circle highlights the 'Optional Fields' link at the bottom of the form.

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.

The screenshot shows the 'Inpatient Request' form with the 'Optional Fields' section expanded. The 'Time Request' field is a text input, and the 'Reason for Request' field is a dropdown menu. A red box highlights these two fields.

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

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

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

**Diagnosis**
















Code Type \*

ICD10

Diagnosis \*

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. <div><table><tr><th>Primary Dx</th><th>Code Type</th><th>Diagnosis</th><th>Actions</th></tr><tr><td></td><td>ICD10</td><td>I50.9--Heart failure, unspecified</td><td></td></tr><tr><td></td><td>ICD10</td><td>R69--Illness, unspecified</td><td></td></tr></table></div>	Primary Dx	Code Type	Diagnosis	Actions		ICD10	I50.9--Heart failure, unspecified			ICD10	R69--Illness, unspecified	
Primary Dx	Code Type	Diagnosis	Actions										
	ICD10	I50.9--Heart failure, unspecified											
	ICD10	R69--Illness, unspecified											
4.	<table><tr><th>If you...</th><th>Then...</th></tr><tr><td>want to add additional diagnoses</td><td>Repeat steps 2 and 3.  <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></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.												

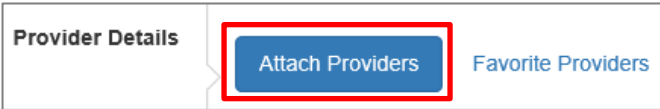
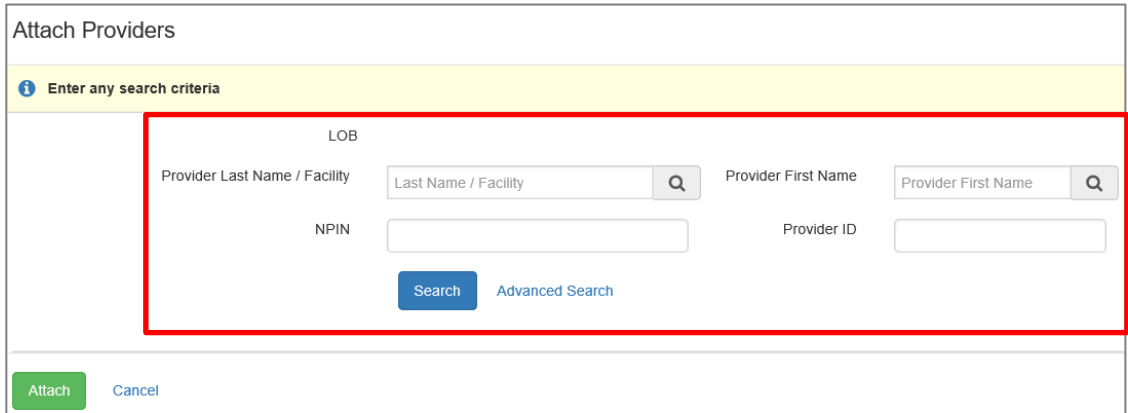
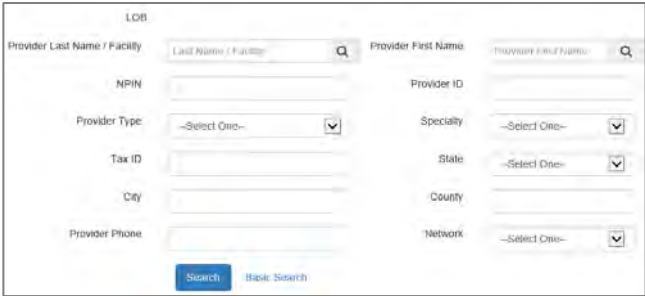
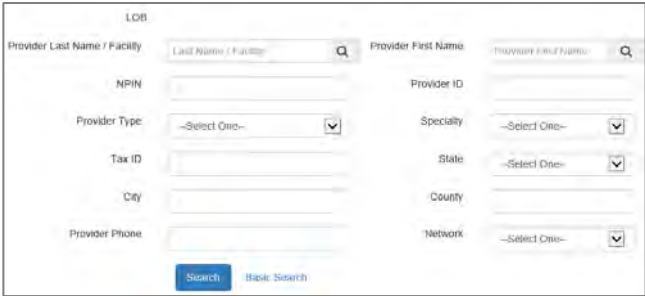
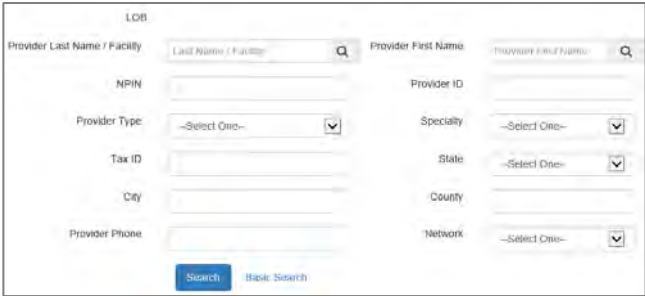
## Adding a New IP Non-Clinical Request – Adding Providers

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.*”


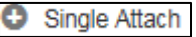

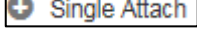
Step	Action						
1.	<p>Click the <b>Attach Providers</b> button.</p> 						
2.	<p>Enter the appropriate search criteria and click on <b>Search</b>.</p> 						
3.	<p>After clicking <b>Search</b>:</p> <table border="1"> <thead> <tr> <th>If appropriate provider...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Is displayed</td><td>Click the <b>Attach</b> button</td></tr> <tr> <td><i>Is not</i> displayed</td><td> <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.)


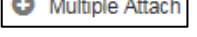

Search Results

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...
<b>Attach <u>multiple providers</u> to an episode at the same time</b>	<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			
	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="401 573 1383 987"> </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
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<b>Modifier</b>	Enter modifier details as appropriate																						
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<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.	<div>Click the <b>Add</b> button</div> <div><b>Result:</b> The Service Request line will now be populated (appears below the Service Request fields)</div> <div><table><tr><th colspan="9">Service Request</th></tr><tr><th>Action</th><th><input type="checkbox"/></th><th>Service Code</th><th>Requested#</th><th>Start Date</th><th>End Date</th><th>Service Type</th><th>Place of Service</th><th>Review Status</th></tr><tr><td></td><td></td><td>93352(CPT)</td><td>1</td><td>08/12/2020</td><td>08/13/2020</td><td>Inpatient</td><td>Medical</td><td></td></tr></table></div> <div><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.</div>	Service Request									Action	<input type="checkbox"/>	Service Code	Requested#	Start Date	End Date	Service Type	Place of Service	Review Status			93352(CPT)	1	08/12/2020	08/13/2020	Inpatient	Medical	
Service Request																												
Action	<input type="checkbox"/>	Service Code	Requested#	Start Date	End Date	Service Type	Place of Service	Review Status																				
		93352(CPT)	1	08/12/2020	08/13/2020	Inpatient	Medical																					
3.	Repeat Steps 1 and 2 to add additional services, if appropriate																											



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

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

Step	Action
1.	<p>Complete the following:</p> <ol style="list-style-type: none"><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 Browse button.</li></ol> <div><div>Documents</div><div><div>Document Title *</div><div>Clinical Information</div><div>Document Description</div><div>Can enter a document description here.</div><div>Document Type</div><div>Medical Document</div><div>Select Document</div><div>Browse</div><div>PP Example Document.docx</div></div></div>

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

Notes

Note Type

--Select One--

▼

Note Encounter Date

08/13/2020

📅

Note Encounter Time

08

▼

49

▼

Note Text

File ▼ Edit ▼ View ▼ Format ▼ Tools ▼

**B**

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ABC ✓

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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.

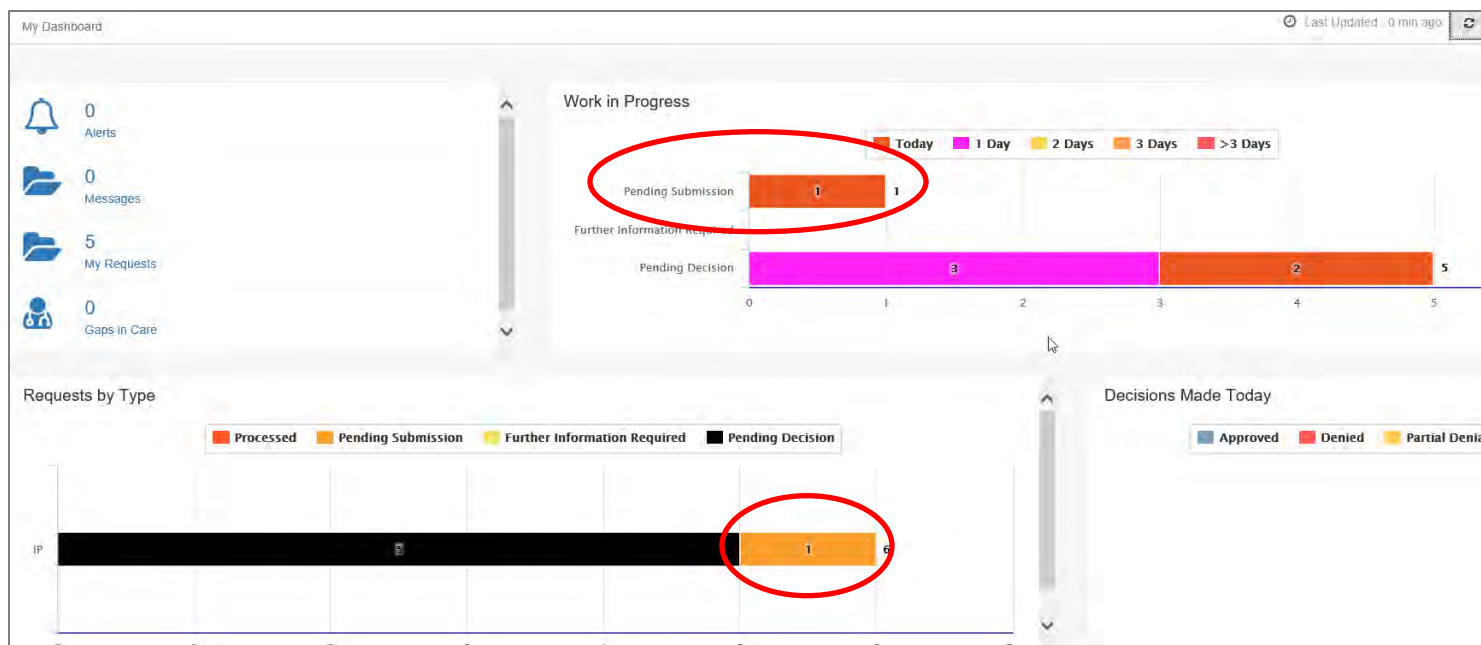


This is a shared note field. Notes can be viewed and entered by both you and the Plan.

## 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> <div> <span>Submit</span> <span>Save as Draft</span> <span>Cancel</span> </div> <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> <div>Inpatient Request (Draft)</div>
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>





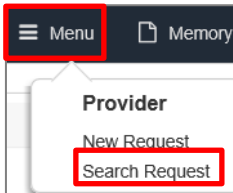
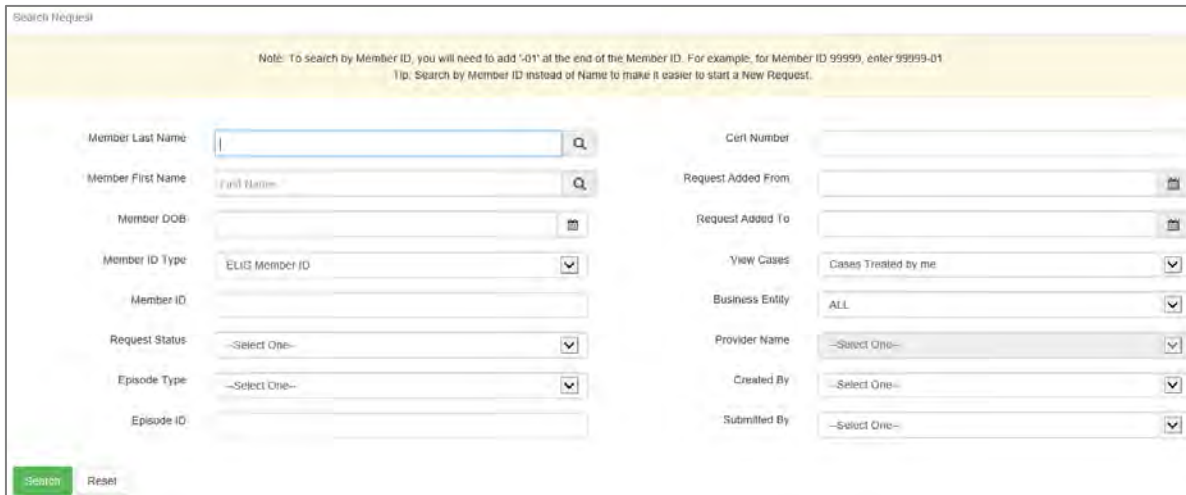
5

## **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> <div><div>Work in Progress</div><div><div>Pending Submission</div><div>3</div></div></div>																				
2.	<p>All Pending Submission requests, regardless of Episode Type, will be displayed.</p> <div><div>Work in Progress</div><div><div>All</div><div>Pending Submission</div><div>Today</div></div><table><thead><tr><th></th><th>Episode Type</th><th>Cert Number</th><th>Episode ID</th><th>Member Name</th></tr></thead><tbody><tr><td>⚙️</td><td>IP</td><td>2008000414</td><td>9025650</td><td>ExampleA, Portal</td></tr><tr><td>⚙️</td><td>IP</td><td>2008000422</td><td>9025658</td><td>ExampleB, Portal</td></tr><tr><td>⚙️</td><td>OP</td><td>2008000423</td><td>9025659</td><td>ExampleA, Portal</td></tr></tbody></table></div>		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																	
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⚙️	IP	2008000422	9025658	ExampleB, Portal																	
⚙️	OP	2008000423	9025659	ExampleA, Portal																	

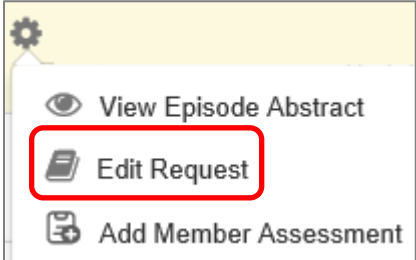

## How to Add Clinical Information to Existing IP Non-Clinical Request

### 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> <div><p>Requests by Type</p><div><div><div></div>Processed</div><div><div></div>Pending Submission</div><div><div></div>Further Information Required</div><div><div></div>Pending Decision</div></div><div><div><div>IP</div><div>5</div></div><div><div>2</div></div></div><div><div>OP</div><div><div>1</div><div>1</div></div></div></div>															
2.	<p>All Pending Submission requests for that Episode Type will be displayed.</p> <div><p>Requests by Type</p><div><div>Inpatient</div><div>Pending Submission</div><div>Date Range</div></div><table><thead><tr><th></th><th>Episode Type</th><th>Cert Number</th><th>Episode ID</th><th>Member Name</th></tr></thead><tbody><tr><td>⚙</td><td>IP</td><td>2008000414</td><td>9025650</td><td>ExampleA, Portal</td></tr><tr><td>⚙</td><td>IP</td><td>2008000422</td><td>9025658</td><td>ExampleB, Portal</td></tr></tbody></table></div>		Episode Type	Cert Number	Episode ID	Member Name	⚙	IP	2008000414	9025650	ExampleA, Portal	⚙	IP	2008000422	9025658	ExampleB, Portal
	Episode Type	Cert Number	Episode ID	Member Name												
⚙	IP	2008000414	9025650	ExampleA, Portal												
⚙	IP	2008000422	9025658	ExampleB, Portal												

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

Follow these steps to open the request for editing.


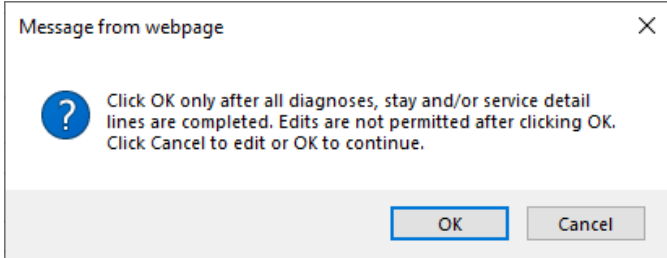
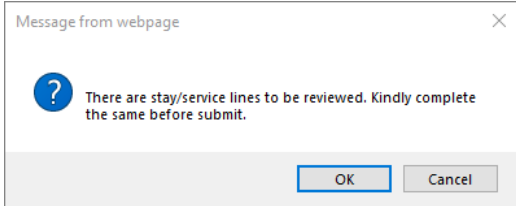
Step	Action
1.	<p>Click on the ⚙ icon to the left of the episode and select <b>Edit Request</b>.</p> <div></div> <p><b>Note:</b> Depending on how you accessed the episode, you may see different options under the gear.</p>
2.	<p>The request will open and is read to be updated.</p>

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





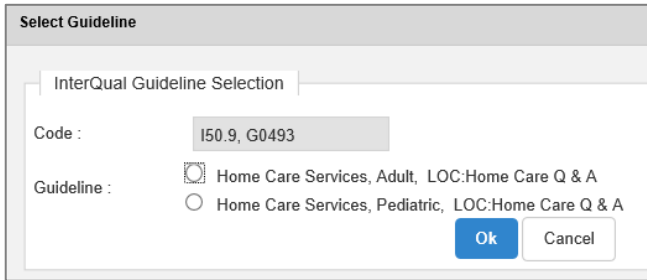
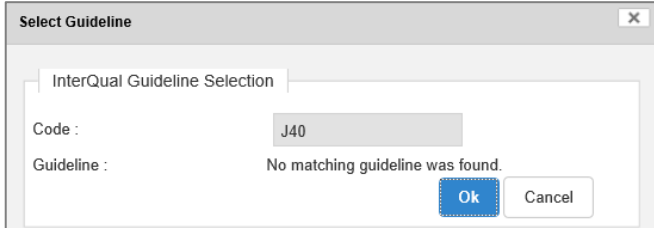
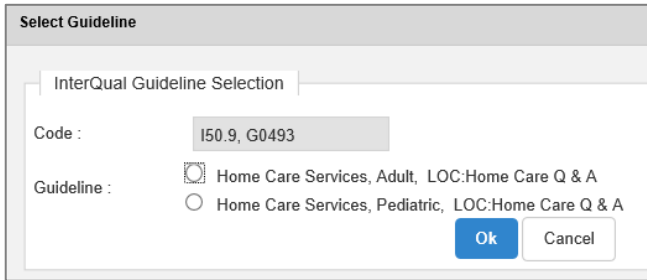
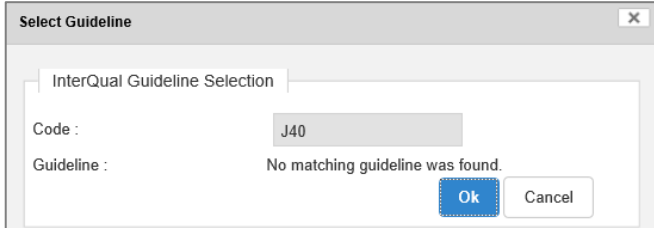
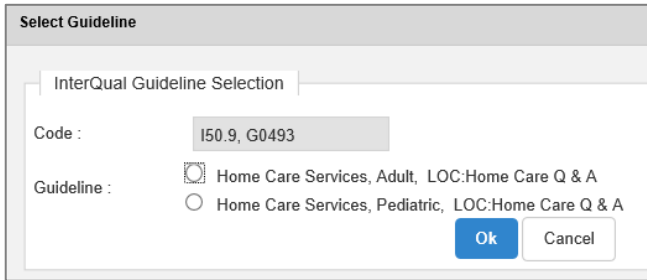
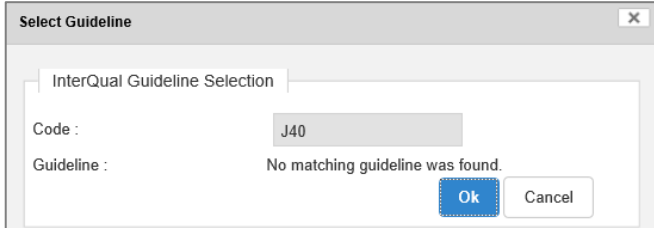
If you need training or have questions regarding the use of InterQual Connect criteria, please contact your facility InterQual trainer or contact your Change HealthCare account representative.

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

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



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

Step	Action						
4.	<p>Click the appropriate <b>Review</b> button.</p> <table border="1"> <thead> <tr> <th>If...</th><th>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>Review</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>Review</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Review</b> button associated with the <b>Service Request</b>.</li> </ul> </td></tr> </tbody> </table>  	If...	Then...	Only a <b>Stay Request</b>	<ul style="list-style-type: none"> <li>Click the <b>Review</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>Review</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Review</b> button associated with the <b>Service Request</b>.</li> </ul>
If...	Then...						
Only a <b>Stay Request</b>	<ul style="list-style-type: none"> <li>Click the <b>Review</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>Review</b> button associated with the Stay Request will be inactive.</li> <li>Click the <b>Review</b> button associated with the <b>Service Request</b>.</li> </ul>						
5.	<p>The system will connect with InterQual and determine if there is a matching guideline.</p> <table border="1"> <thead> <tr> <th>If there is...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td><b>Matching Guideline</b></td><td> <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>  </td></tr> <tr> <td><b>No Matching Guideline</b></td><td> <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>  </td></tr> </tbody> </table>	If there is...	Then...	<b>Matching Guideline</b>	<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> 	<b>No Matching Guideline</b>	<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> 
If there is...	Then...						
<b>Matching Guideline</b>	<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> 						
<b>No Matching Guideline</b>	<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> 						

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

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

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

**Notes**

Note Type:

Note Encounter Date:

Note Encounter Time:

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> <div> <span>Submit</span> <span>Save as Draft</span> <span>Delete</span> <span>Cancel</span> </div> <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

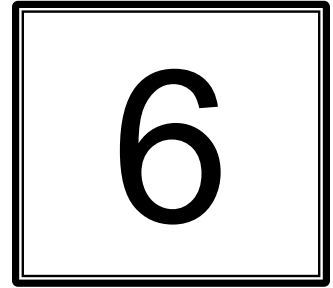
Cert Number 2008000412

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	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 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 section 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 header. Below the header is a section titled 'Outpatient Request'. Inside this section, there is a tab labeled 'Episode Details'. To the right of the 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 'Outpatient Request' form. 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 dropdown menus in the second row have a downward arrow icon.

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

## Adding a New OP Clinical Request – Adding Diagnosis

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

**Diagnosis**
















Code Type \*

ICD10

Diagnosis \*

Diagnosis

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

Step	Action												
1.	<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. <div><table><tr><th>Primary Dx</th><th>Code Type</th><th>Diagnosis</th><th>Actions</th></tr><tr><td></td><td>ICD10</td><td>I50.9--Heart failure, unspecified</td><td></td></tr><tr><td></td><td>ICD10</td><td>R69--Illness, unspecified</td><td></td></tr></table></div>	Primary Dx	Code Type	Diagnosis	Actions		ICD10	I50.9--Heart failure, unspecified			ICD10	R69--Illness, unspecified	
Primary Dx	Code Type	Diagnosis	Actions										
	ICD10	I50.9--Heart failure, unspecified											
	ICD10	R69--Illness, unspecified											
4.	<table><tr><th>If you...</th><th>Then...</th></tr><tr><td>want to add additional diagnoses</td><td>Repeat steps 2 and 3.  <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></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.												

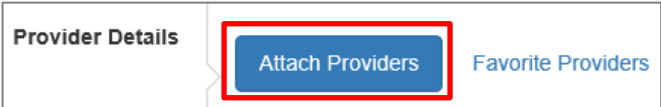
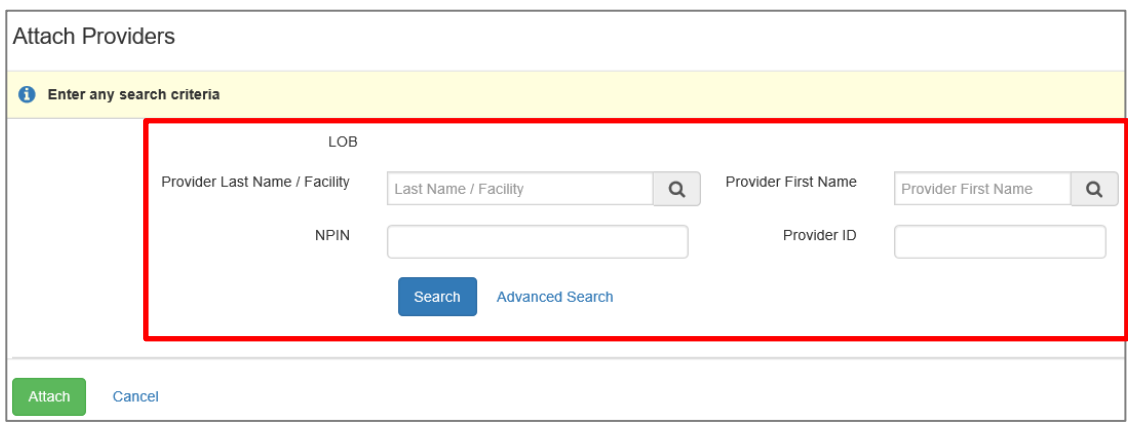
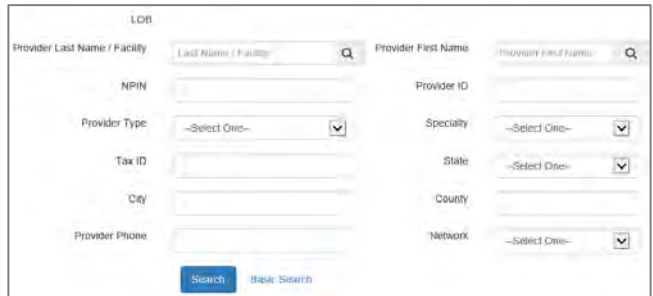
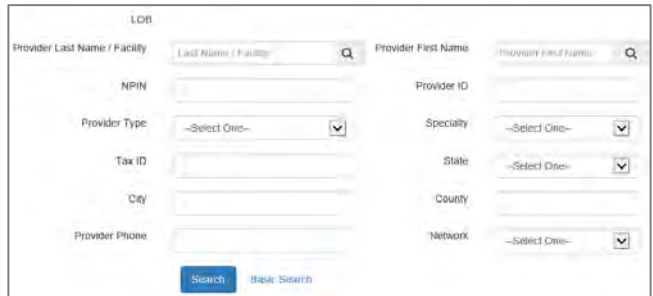
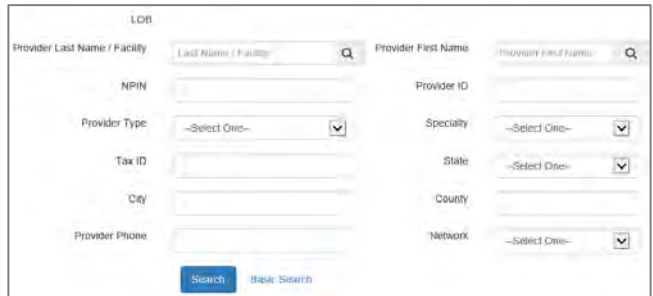
## Adding a New OP Clinical Request – Adding Providers

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"> <thead> <tr> <th>If appropriate provider...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Is displayed</td><td>Click the <b>Attach</b> button</td></tr> <tr> <td><i>Is not</i> displayed</td><td> <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.																						
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<b>Modifier</b>	Enter modifier details as appropriate																						
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<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><tr><th colspan="7">Service Request</th></tr><tr><th>Action</th><th>Service Code</th><th>Requested#</th><th>Start Date</th><th>End Date</th><th>Service Type</th><th>Place of Service</th></tr><tr><td></td><td>G0493(HCPC)</td><td>5</td><td>08/17/2020</td><td>09/01/2020</td><td>Home</td><td>Medical</td></tr><tr><td></td><td>S9131(HCPC)</td><td>14</td><td>08/19/2020</td><td>09/02/2020</td><td>Home</td><td>Medical</td></tr></table> <p><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																												


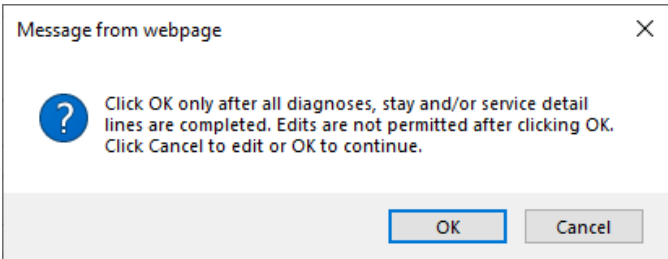
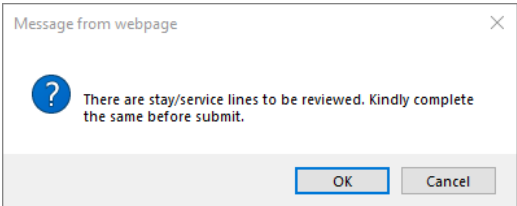
## Adding a New OP Clinical Request – InterQual

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

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

Step	Action																		
4.	<p>Click the <b>Review</b> button.</p> <div><div>Review</div><div>Service Request</div><table><tr><th>Action</th><th></th><th>Service Code</th><th>Requested#</th><th>Start Date</th><th>End Date</th><th>Service Type</th><th>Place of Service</th><th>Review Status</th></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td>93352(CPT)</td><td>1</td><td>08/12/2020</td><td>08/13/2020</td><td>Inpatient</td><td>Medical</td><td></td></tr></table></div>	Action		Service Code	Requested#	Start Date	End Date	Service Type	Place of Service	Review Status		<input checked="" type="checkbox"/>	93352(CPT)	1	08/12/2020	08/13/2020	Inpatient	Medical	
Action		Service Code	Requested#	Start Date	End Date	Service Type	Place of Service	Review Status											
	<input checked="" type="checkbox"/>	93352(CPT)	1	08/12/2020	08/13/2020	Inpatient	Medical												
5.	<p>The system will connect with InterQual and determine if there is a matching guideline.</p> <table><tr><th>If there is...</th><th>Then...</th></tr><tr><td><b>Matching Guideline</b></td><td><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><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : I50.9, G0493</div><div>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</div><div><div>Ok</div><div>Cancel</div></div></div></div></td></tr><tr><td><b>No Matching Guideline</b></td><td><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><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : J40</div><div>Guideline : No matching guideline was found.</div><div><div>Ok</div><div>Cancel</div></div></div></div></td></tr></table>	If there is...	Then...	<b>Matching Guideline</b>	<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><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : I50.9, G0493</div><div>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</div><div><div>Ok</div><div>Cancel</div></div></div></div>	<b>No Matching Guideline</b>	<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><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : J40</div><div>Guideline : No matching guideline was found.</div><div><div>Ok</div><div>Cancel</div></div></div></div>												
If there is...	Then...																		
<b>Matching Guideline</b>	<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><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : I50.9, G0493</div><div>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</div><div><div>Ok</div><div>Cancel</div></div></div></div>																		
<b>No Matching Guideline</b>	<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><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : J40</div><div>Guideline : No matching guideline was found.</div><div><div>Ok</div><div>Cancel</div></div></div></div>																		



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

Step	Action						
6.	After answering the review questions, the Recommendations page will display either <b>Criteria Met</b> or <b>Criteria Not Met</b> .						
7.	<div>From the <b>Recommendations</b> page:</div> <table><tr><th>If you click...</th><th>Then...</th></tr><tr><td><b>Save</b></td><td>The review will be saved and can be updated, if needed, prior to submitting the request.</td></tr><tr><td><b>Complete</b></td><td>The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td></tr></table>	If you click...	Then...	<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.

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

## Adding a New OP Clinical Request – Adding Notes

Notes

Note Type

--Select One--

▼

Note Encounter Date

08/13/2020

📅

Note Encounter Time

08

▼

49

▼

Note Text

File ▼ Edit ▼ View ▼ Format ▼ Tools ▼

**B**

*I*

U

ABC ✓

📎

⬆

⬇

⬆

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> <div> <span>Submit</span> <span>Save as Draft</span> <span>Delete</span> <span>Cancel</span> </div> <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										
<p>Expected Decision Date : 08/15/2020      Authorization Type <b>OP</b>      Episode Number : 9025648      Episode Status : OpenRequest      Cert Number 2008000412</p>										
Authorization Details	Service ID	Service Code	Requested #	Assigned #	Denied	Auth Start Date	Auth End Date	Service Type	Frequency	Decision
	12548538	27428(CPT)	1	0	0			Inpatient	Per Day	Pending



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

## How to Enter an Outpatient Non-Clinical Request

---

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

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

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

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

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

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

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

The screenshot shows the top of a web application. At the top, there is a header bar with fields for 'ExampleA, Portal (Female)', 'DOB:', 'Member ID:', and 'Government Id:'. Below this is a section 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 header. Below the header is a section titled 'Outpatient Request'. Inside this section, there is a tab labeled 'Episode Details'. To the right of the 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 'Outpatient Request' form. 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.

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



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

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

**Diagnosis**
















Code Type \*

ICD10

Diagnosis \*

Diagnosis

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

Step	Action												
1.	<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. <div><table><tr><th>Primary Dx</th><th>Code Type</th><th>Diagnosis</th><th>Actions</th></tr><tr><td></td><td>ICD10</td><td>I50.9--Heart failure, unspecified</td><td></td></tr><tr><td></td><td>ICD10</td><td>R69--Illness, unspecified</td><td></td></tr></table></div>	Primary Dx	Code Type	Diagnosis	Actions		ICD10	I50.9--Heart failure, unspecified			ICD10	R69--Illness, unspecified	
Primary Dx	Code Type	Diagnosis	Actions										
	ICD10	I50.9--Heart failure, unspecified											
	ICD10	R69--Illness, unspecified											
4.	<table><tr><th>If you...</th><th>Then...</th></tr><tr><td>want to add additional diagnoses</td><td>Repeat steps 2 and 3.  <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></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.												


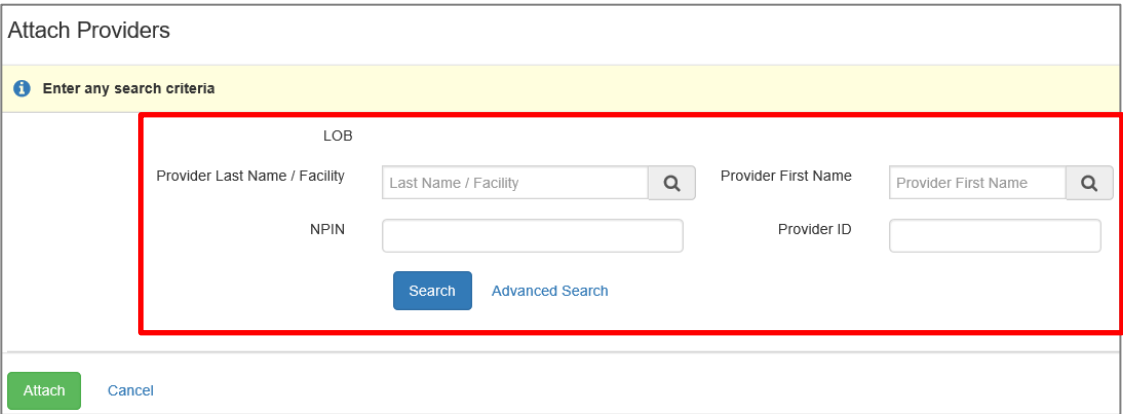
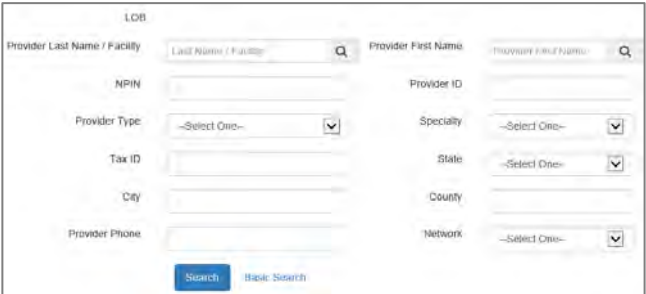
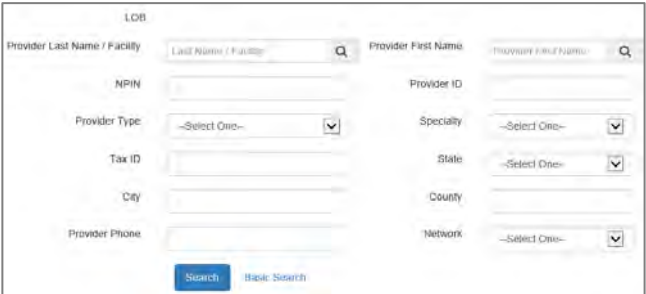
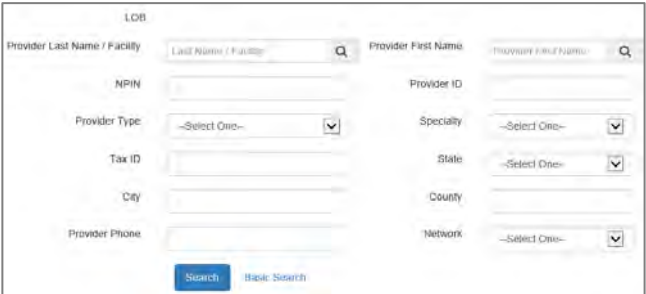
## Adding a New OP Non-Clinical Request – Adding Providers

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"> <thead> <tr> <th>If appropriate provider...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>Is displayed</td><td>Click the <b>Attach</b> button</td></tr> <tr> <td><i>Is not</i> displayed</td><td> <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.)




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 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><tr><th colspan="7">Service Request</th></tr><tr><th>Action</th><th>Service Code</th><th>Requested#</th><th>Start Date</th><th>End Date</th><th>Service Type</th><th>Place of Service</th></tr><tr><td></td><td>G0493(HCPC)</td><td>5</td><td>08/17/2020</td><td>09/01/2020</td><td>Home</td><td>Medical</td></tr><tr><td></td><td>S9131(HCPC)</td><td>14</td><td>08/19/2020</td><td>09/02/2020</td><td>Home</td><td>Medical</td></tr></table> <p><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 a **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 Browse button.</li></ol> <div><div>Documents</div><div><div>Document Title *</div><div>Clinical Information</div><div>Document Description</div><div>Can enter a document description here.</div><div>Document Type</div><div>Medical Document</div><div>Select Document</div><div>Browse</div><div>PP Example Document.docx</div></div></div>

## Adding a New OP 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 ✓

📎

⬆

⬇

⬆

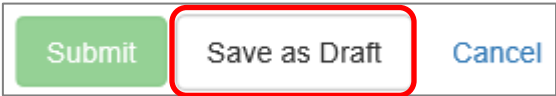

Step	Action
1.	Select the appropriate <b>Note Type</b> from the drop-down menu.
2.	Enter the appropriate notes in the notes section. Be sure to include your <b>name</b> and <b>contact information</b> in the event the Plan needs to contact you.

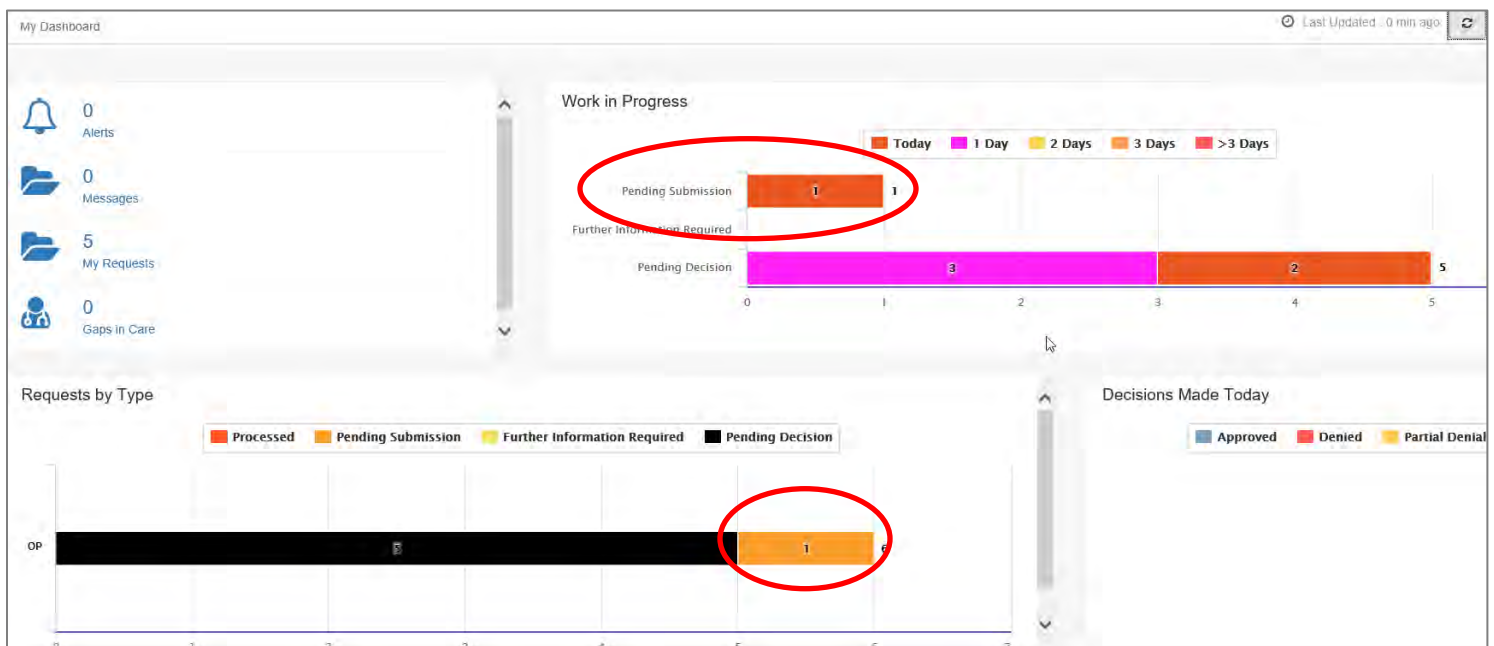


This is a shared note field. Notes can be viewed and entered by both you and the Plan.

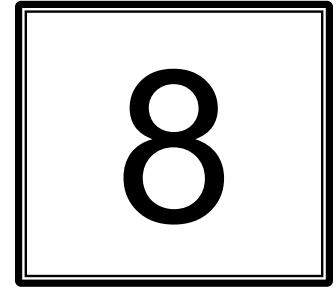
## Adding a New OP Non-Clinical Request – Saving as Draft

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>





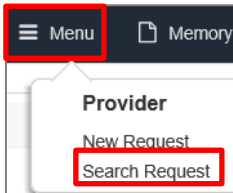
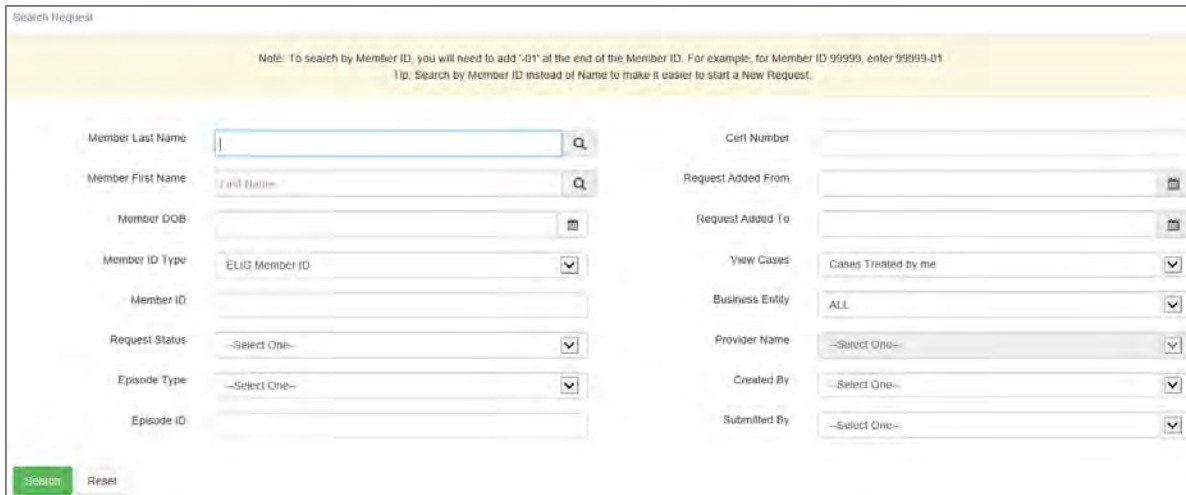


## **8 ADD CLINICAL TO AN EXISTING OP NON-CLINICAL REQUEST**

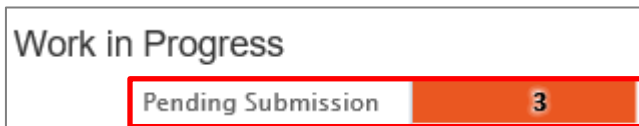
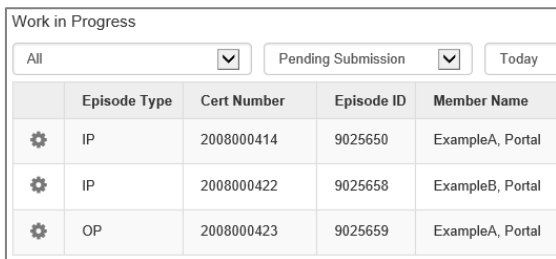
## Adding Clinical Information to an Existing OP Non-clinical Request

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> 

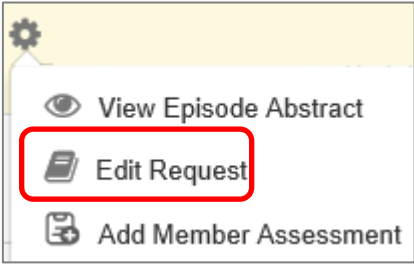
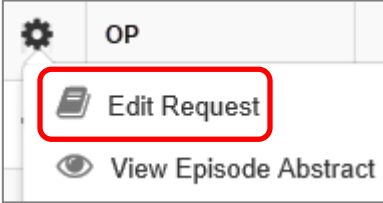
## Adding Clinical Information to Existing OP Non-Clinical Request, continued

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

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

Follow these steps to open the request for editing.

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


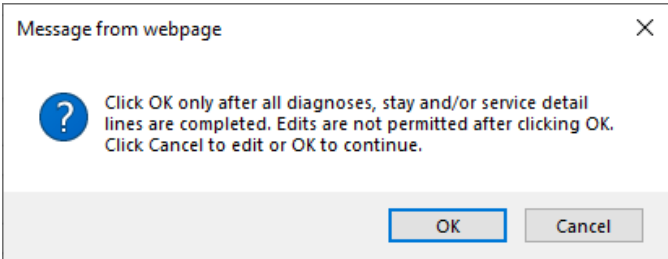
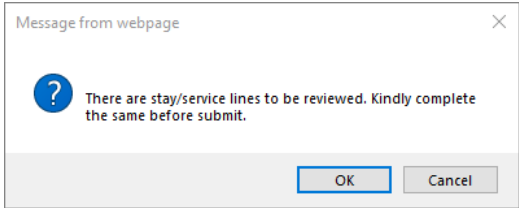
## Adding Clinical Information to Existing OP Non-Clinical Request – InterQual

Access and complete InterQual Connect Clinical Criteria



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

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

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

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

Step	Action																		
4.	<p>Click the <b>Review</b> button.</p> <div><div>Review</div><div>Service Request</div><table><tr><th>Action</th><th><input checked="" type="checkbox"/></th><th>Service Code</th><th>Requested#</th><th>Start Date</th><th>End Date</th><th>Service Type</th><th>Place of Service</th><th>Review Status</th></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td>93352(CPT)</td><td>1</td><td>08/12/2020</td><td>08/13/2020</td><td>Inpatient</td><td>Medical</td><td></td></tr></table></div>	Action	<input checked="" type="checkbox"/>	Service Code	Requested#	Start Date	End Date	Service Type	Place of Service	Review Status		<input checked="" type="checkbox"/>	93352(CPT)	1	08/12/2020	08/13/2020	Inpatient	Medical	
Action	<input checked="" type="checkbox"/>	Service Code	Requested#	Start Date	End Date	Service Type	Place of Service	Review Status											
	<input checked="" type="checkbox"/>	93352(CPT)	1	08/12/2020	08/13/2020	Inpatient	Medical												
5.	<p>The system will connect with InterQual and determine if there is a matching guideline.</p> <table><tr><th>If there is...</th><th>Then...</th></tr><tr><td><b>Matching Guideline</b></td><td><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><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : I50.9, G0493</div><div>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</div><div>OkCancel</div></div></div></td></tr><tr><td><b>No Matching Guideline</b></td><td><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><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : J40</div><div>Guideline : No matching guideline was found.</div><div>OkCancel</div></div></div></td></tr></table>	If there is...	Then...	<b>Matching Guideline</b>	<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><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : I50.9, G0493</div><div>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</div><div>OkCancel</div></div></div>	<b>No Matching Guideline</b>	<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><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : J40</div><div>Guideline : No matching guideline was found.</div><div>OkCancel</div></div></div>												
If there is...	Then...																		
<b>Matching Guideline</b>	<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><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : I50.9, G0493</div><div>Guideline : <input checked="" type="radio"/> Home Care Services, Adult, LOC:Home Care Q &amp; A <input type="radio"/> Home Care Services, Pediatric, LOC:Home Care Q &amp; A</div><div>OkCancel</div></div></div>																		
<b>No Matching Guideline</b>	<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><div>Select Guideline</div><div><div>InterQual Guideline Selection</div><div>Code : J40</div><div>Guideline : No matching guideline was found.</div><div>OkCancel</div></div></div>																		

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

Step	Action						
6.	After answering the review questions, the Recommendations page will display either <b>Criteria Met</b> or <b>Criteria Not Met</b> .						
7.	<div>From the <b>Recommendations</b> page:<table><tr><th>If you click...</th><th>Then...</th></tr><tr><td><b>Save</b></td><td>The review will be saved and can be updated, if needed, prior to submitting the request.</td></tr><tr><td><b>Complete</b></td><td>The review will be saved and closed. It cannot be updated even if you have not yet submitted the request.</td></tr></table></div>	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.

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

Complete Save Save and Generate POC Cancel

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

Assessment Score 0 of 9 Provider Portal Delivery Screening Assessmer 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 a **Documents**.

Step	Action
1.	<p>Complete the following:</p> <ul style="list-style-type: none"><li>f. <b>Document Title:</b> enter the title of the document</li><li>g. <b>Document Type:</b> defaults to <b>Medical Document</b>, update as needed.</li><li>h. <b>Document Description:</b> optional field</li><li>i. Click the <b>Browse</b> button to search for the document you wish to upload<ul style="list-style-type: none"><li>vi. Click the desired document and click the <b>Open</b> button</li></ul></li><li>j. You will see the document name listed next to the Browse button.</li></ul>
	<div><div>Documents</div><div><div>Document Title *</div><div>Clinical Information</div><div>Document Description</div><div>Can enter a document description here.</div><div>Document Type</div><div>Medical Document</div><div>Select Document</div><div>Browse</div><div>PP Example Document.docx</div></div></div>

## Adding Clinical Information to Existing 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*

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ABC ✓

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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.



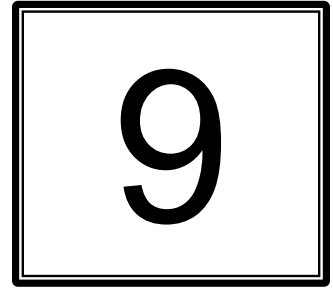
This is a shared note field. Notes can be viewed and entered by both you and the Plan.

## 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> <div> <span>Submit</span> <span>Save as Draft</span> <span>Delete</span> <span>Cancel</span> </div> <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										
<p>Expected Decision Date : 08/15/2020      Authorization Type <b>OP</b>      Episode Number : 9025648      Episode Status : OpenRequest      Cert Number 2008000412</p>										
Authorization Details	Service ID	Service Code	Requested #	Assigned #	Denied	Auth Start Date	Auth End Date	Service Type	Frequency	Decision
	12548538	27428(CPT)	1	0	0			Inpatient	Per Day	Pending



## **9 ADDITIONAL PROCESSES**

## Search for Determination

Search Request

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

Member Last Name:

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> <div>  Menu            Memory List           <div> <b>Provider</b>              New Request              Search Request           </div> </div>
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: <div> <div>  View Episode Abstract   Open   Add Member Assessment             </div> </div>

## Extending an Existing Request

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

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

Search Request

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

Member Last Name

Last Name

Q

Member First Name

First Name

Q

Member DOB

Member ID Type

ELIG Member ID

Member ID

Request Status

--Select One--

Episode Type

--Select One--

Episode ID

Cert Number

Request Added From

Request Added To

View Cases

Cases Treated by me

Business Entity

ALL

Provider Name

--Select One--

Created By


--Select One--

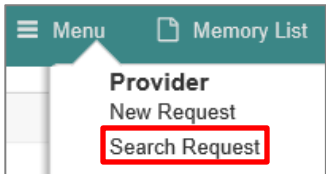
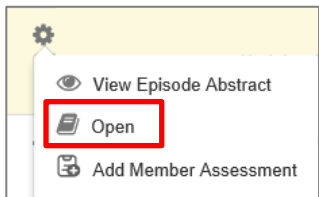
Submitted By

--Select One--

Search

Reset

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

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

## Extending an Existing Request, cont.

Member Overview > IP(9026523)

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

Review Extension Add

Stay Request

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

Page 1 of 1

Note

Diagnosis

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

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

Save Cancel

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

Requested Date \* 09/15/2020

Request Received Time \* 09 27

Request Type \* --Select One--

Request Priority \* --Select One--

Time Request

Due Date

Save Cancel

Member Overview > IP(9026532)

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

Add

Stay Request

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

Note

Diagnosis

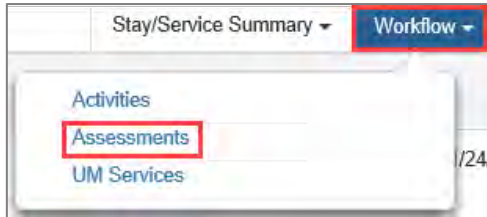
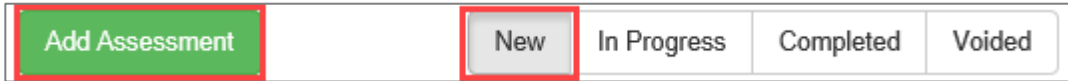
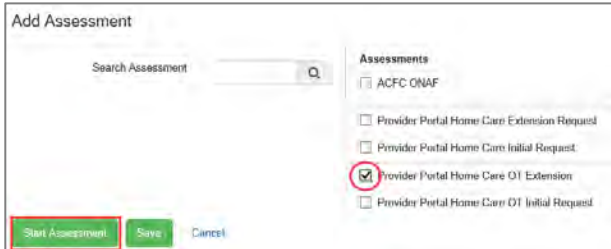
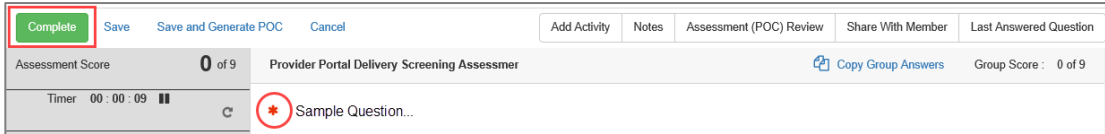
Primary Dx	Code Type	Diagnosis
I50.9	ICD10	I50.9-Heart failure, unspecified



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

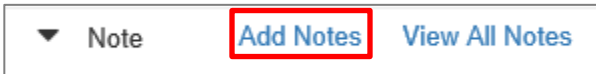
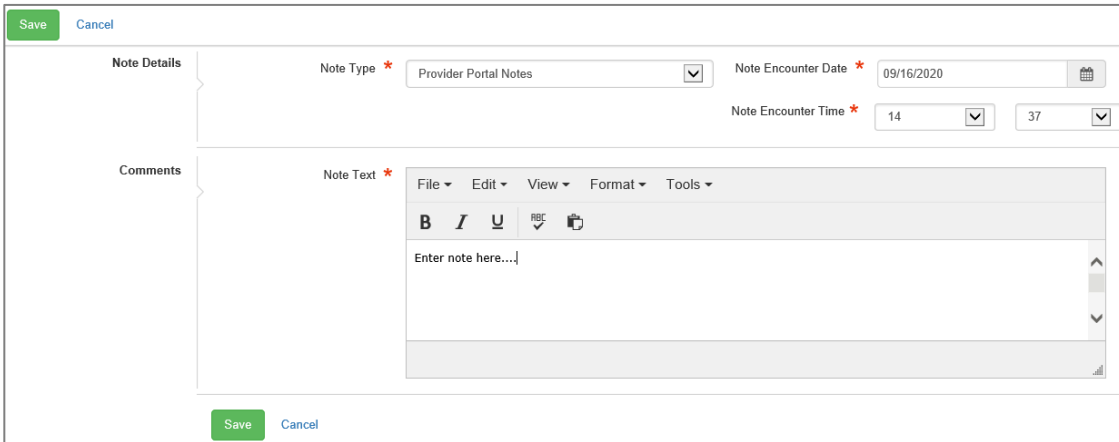
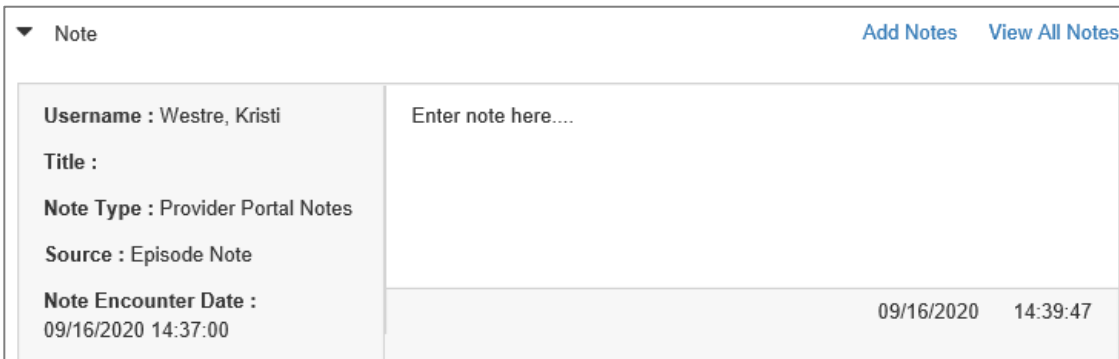
## Extending an Existing Request – Adding Assessments

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

Step	Action
1.	<p>Click on <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

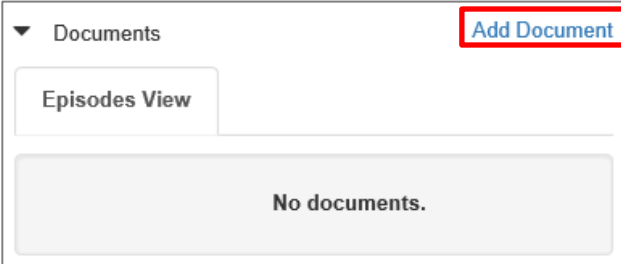
Step	Action
1.	<p>Within the <b>Note widget</b> on the right side of the episode screen, click on <b>Add Notes</b></p> 
2.	<p>Enter the appropriate notes for the extension in the notes section. Be sure to include your <b>name</b> and <b>contact information</b> in the event the Plan needs to contact you.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



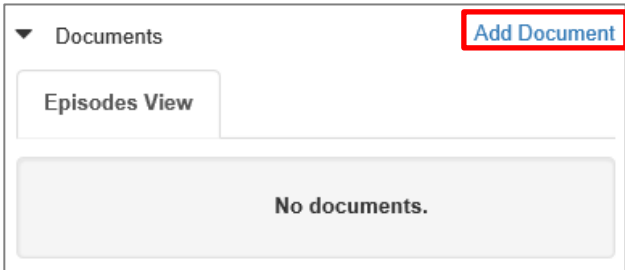
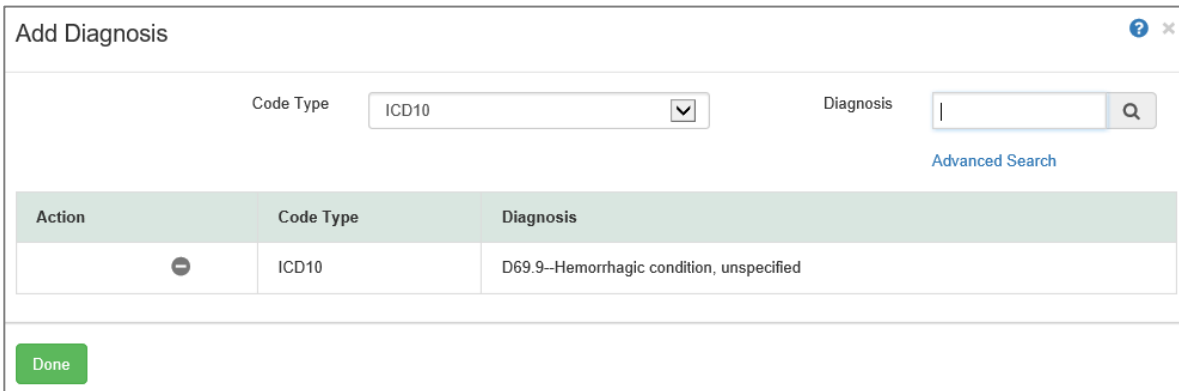
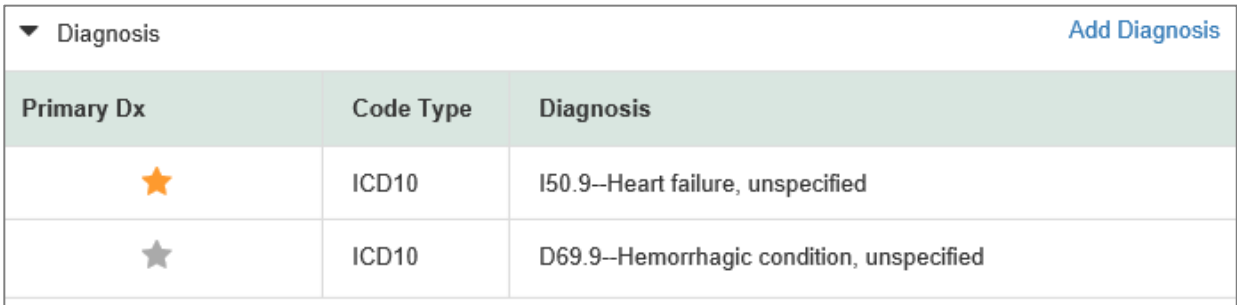
This is a shared note field. Notes can be viewed and entered by both you and the plan.

## Extending an Existing Request – Adding Documents

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

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

## Add Additional Diagnoses to an Existing Request








Step	Action
1.	Locate and open the appropriate episode.
2.	<p>Within the <b>Diagnosis widget</b> on the right side of the episode screen, click on <b>Add Diagnosis</b></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> 
4.	<p>The new diagnosis will now be displayed in the <b>Diagnosis widget</b></p> 

## Favorite Diagnosis List – How to Create

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

Step	Action																
1.	<p>When creating an episode, click on the <b>Advanced Search</b> hyperlink to search for a diagnosis</p> <div><div><div><div><div><div>1</div><div>Diagnosis</div></div></div><div><div>Code Type *</div><div>ICD10</div><div></div></div><div><div>Diagnosis *</div><div>Diagnosis</div><div></div></div></div></div><div><div>Advanced Search</div><div>Favorite Diagnosis</div></div></div>																
2.	<p>Type the code or description in the appropriate field and click on <b>Search</b></p> <div><div><div>Diagnosis Advanced Search</div><div><div>For a defined search please enter the first 3 letters of diagnosis in the 'Description' field.</div><div><div><div>Diagnosis Code Type</div><div>ICD10</div><div></div></div><div><div>Diagnosis Code</div><div></div></div><div><div>Description</div><div>cerebral</div></div></div><div><div>Search</div></div></div><div><div>Search Results</div><table><thead><tr><th></th><th>Diagnosis Code Type</th><th>Diagnosis Code</th><th>Description</th></tr></thead><tbody><tr><td>+</td><td>ICD10</td><td>B42.81</td><td>Cerebral sporotrichosis</td></tr><tr><td>+</td><td>ICD10</td><td>B45.1</td><td>Cerebral cryptococcosis</td></tr><tr><td>+</td><td>ICD10</td><td>G80.9</td><td>Cerebral palsy, unspecified</td></tr></tbody></table><div><div>1</div><div>2</div><div>3</div><div>4</div><div>5</div></div><div>Page 1 of 12</div></div></div></div>		Diagnosis Code Type	Diagnosis Code	Description	+	ICD10	B42.81	Cerebral sporotrichosis	+	ICD10	B45.1	Cerebral cryptococcosis	+	ICD10	G80.9	Cerebral palsy, unspecified
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3.	<p>Click on the <b>+ sign</b> next to the appropriate diagnosis code</p> <div><div><div>Diagnosis Advanced Search</div><div><div>For a defined search please enter the first 3 letters of diagnosis in the 'Description' field.</div><div><div><div>Diagnosis Code Type</div><div>ICD10</div><div></div></div><div><div>Diagnosis Code</div><div></div></div><div><div>Description</div><div>cerebral</div></div></div><div><div>Search</div></div></div><div><div>Search Results</div><table><thead><tr><th></th><th>Diagnosis Code Type</th><th>Diagnosis Code</th><th>Description</th></tr></thead><tbody><tr><td>+</td><td>ICD10</td><td>B42.81</td><td>Cerebral sporotrichosis</td></tr><tr><td>+</td><td>ICD10</td><td>B45.1</td><td>Cerebral cryptococcosis</td></tr><tr><td>+</td><td>ICD10</td><td>G80.9</td><td>Cerebral palsy, unspecified</td></tr></tbody></table><div><div>1</div><div>2</div><div>3</div><div>4</div><div>5</div></div><div>Page 1 of 12</div></div></div></div>		Diagnosis Code Type	Diagnosis Code	Description	+	ICD10	B42.81	Cerebral sporotrichosis	+	ICD10	B45.1	Cerebral cryptococcosis	+	ICD10	G80.9	Cerebral palsy, unspecified
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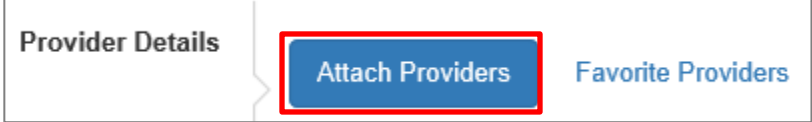

## Favorite Diagnosis List – How to Create (cont.)

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><div>Selected Diagnosis List </div><table><thead><tr><th></th><th>Diagnosis Code Type</th><th>Diagnosis Code</th><th>Description</th><th>Action</th></tr></thead><tbody><tr><td></td><td>ICD10</td><td>B42.81</td><td>Cerebral sporotrichosis</td><td></td></tr></tbody></table><div><div>Attach</div><div>Cancel</div></div></div> <table><thead><tr><th>If...</th><th>Then...</th></tr></thead><tbody><tr><td>You wish to add the diagnosis to your <b>Favorite Diagnosis</b> list</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</b> list	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
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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>																



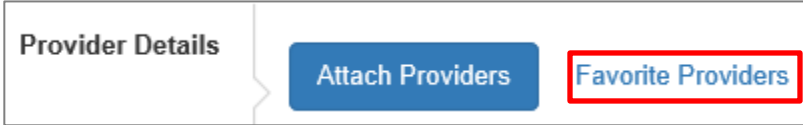
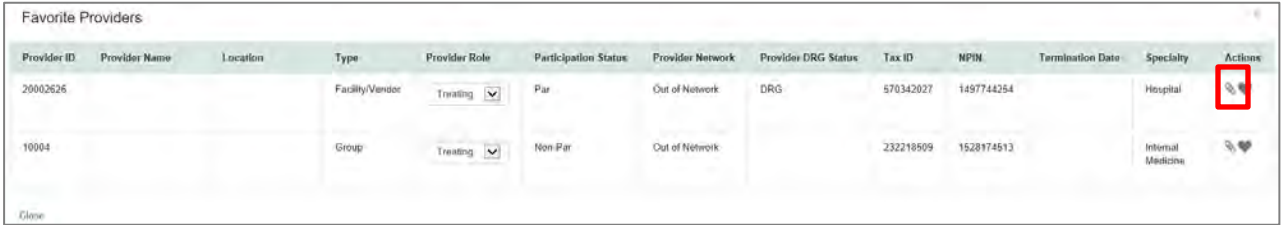
## Favorite Providers List – How to Create

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> 
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> 

## 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> 

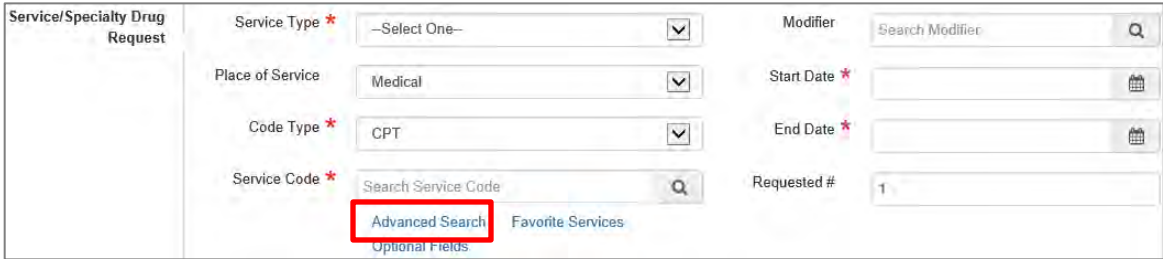
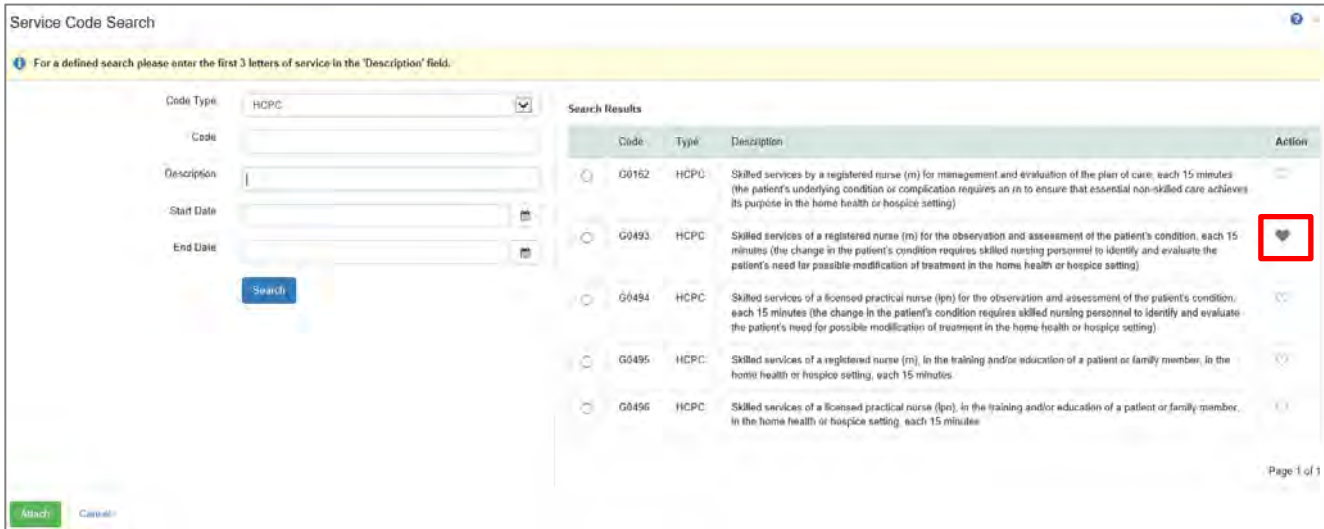


Click the heart icon  to remove a Provider from your **Favorite Providers** list.



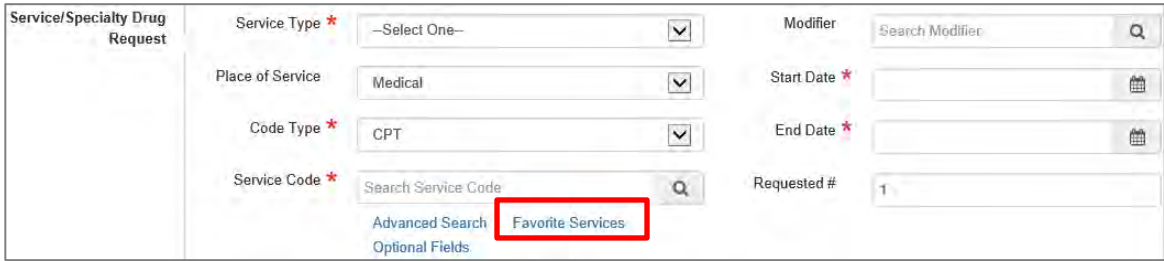
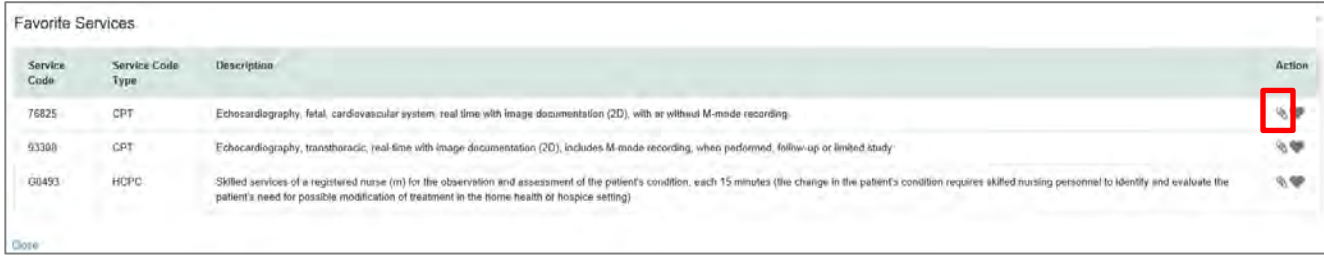
## Favorite Services List – How to Create

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> 

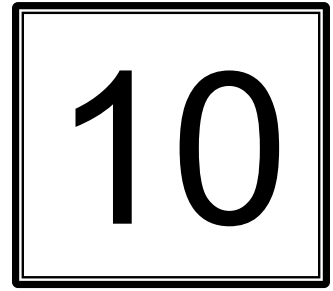
## Favorite Services List – Utilizing the List

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> 
2.	<p>Click on the <b>Attach Icon</b> (paperclip) to add the service code to the request.</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> )