



AmeriHealth *Caritas*[™]

District of Columbia

Jiva – Provider Portal
Reference Guide

Welcome Home!



Welcome to your NaviNet home page, customized just for you. NaviNet Home allows you to

personalize your relationship with the health plans and service providers you connect to via NaviNet.

Fewer clicks, easier navigation to all the NaviNet health plans and services you use.

Customized updates on the latest news and NaviNet services, just for you.

Short-cuts directly to the Web sites you visit most often.

Save time and minimize log-ins, when you set the length of your own session.

For more information about your NaviNet Home, go to [NaviNet Customer Care](#) and click on "NaviNet Common Concepts."

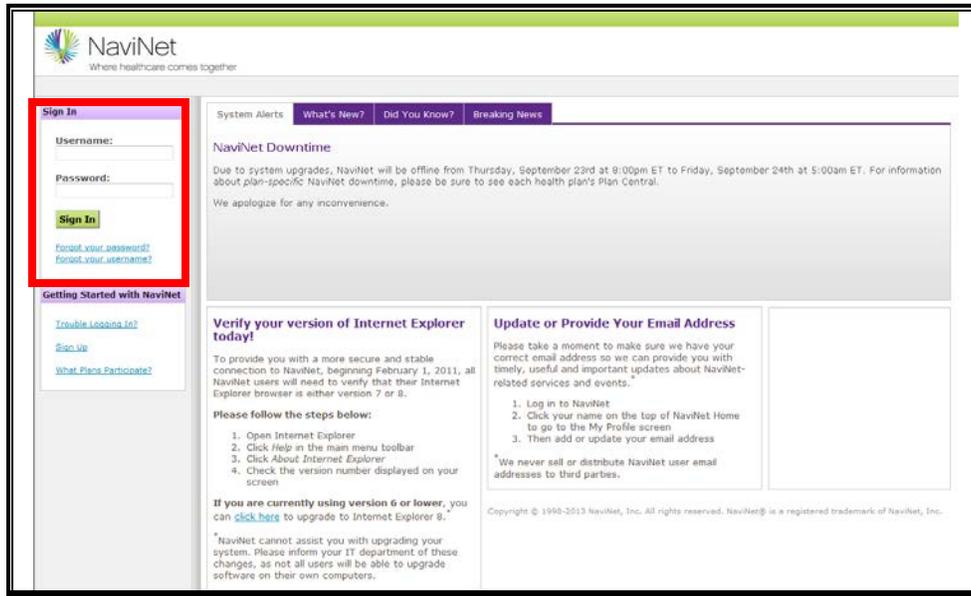
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1 LOGGING INTO THE PROVIDER PORTAL

Logging into the Provider Portal



Step	Action
1.	Access NaviNet using the follow address: https://navinet.navimedix.com/sign-in?ReturnUrl=/Main.aspx .
2.	Enter your Username .
3.	Enter your Password .
4.	Click the Sign In button. Note – The NaviNet Home screen appears.
5.	Select the health plan of your choice in the left navigation window.
6.	Click the Pre-Authorization Management hyperlink.
7.	If applicable, select the group of your choice from the “Group-Group Number – Plan:” drop down Note – Jiva dashboard screen will appear.

Overview of the Dashboard

Upon logging in to the provider portal, you will be taken to the dashboard view.

Menu Bar	Description
New Request	This tab will allow you to start a new request.
Search Request	This tab will allow you to search for an existing request and view the determination of a request.

My Tasks (Left Navigation Window)	Description
Actions Required	This tab will let you see any request that you started or saved, but have not yet been submitted with clinical information. (The health plan can view these requests.)
Closed Requests	This tab will show requests that have recently been closed by the health plan. They will stay on the list for 30 days and then they will no longer be visible.
Active Requests	This tab will show any requests that are in process. For example, you have submitted the episode and it is ongoing.

	My Inbox (menu bar), Messages and Gaps in Care are currently not utilized.
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2 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 3 “How to Enter an IP Nonclinical Request” and Chapter 4 “How to Add Clinical Information to an Existing IP Nonclinical 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**

- **Assessment (if triggered)**

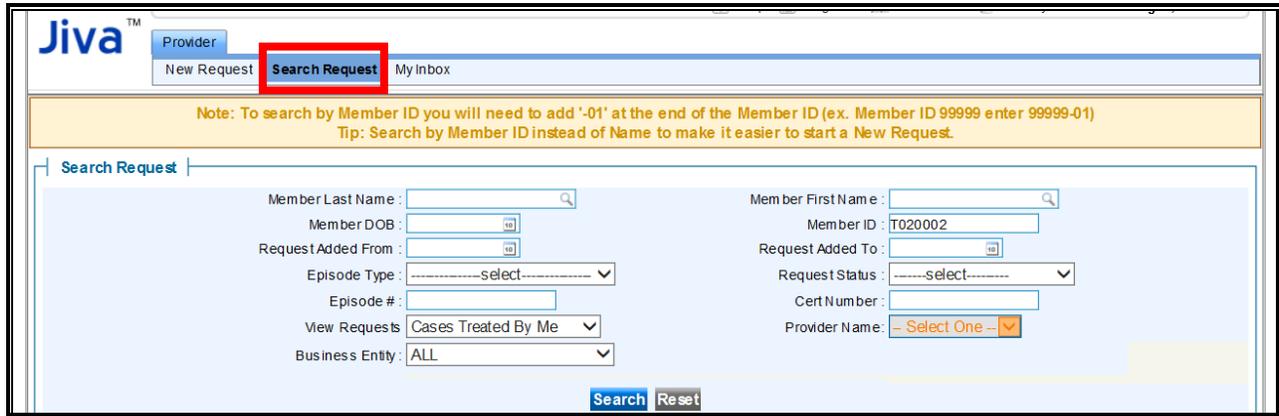


Requests where the clinical information is entered may auto approve based on what is requested and the information provided in the assessment.

Searching for a Member

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

	<h3>Duplicate Case Check and Alert</h3>
	<p>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.</p> <p>Jiva will not auto approve any case that is a possible duplicate. The request will be evaluated by the Utilization Management team.</p>



Step	Action
1.	Click on Search Request on the menu bar.
2.	Enter the “member ID” in the member ID field or the member’s name and DOB. IMPORTANT – Please enter “-01” at the end of the member ID.
3.	Select “ Cases Treated By Me ” in the View Requests drop down.
4.	Verify that “ All ” is in the Business Entity field.
5.	Click the Search button and check for duplicate requests.
6.	Click the Add New Request button.
7.	Select Inpatient from the drop down Note – Adding a request from this screen auto populates the member’s data.

	<p>When searching by member’s name you must fill out all three of the following fields:</p> <ul style="list-style-type: none"> - Member Last Name - Member First Name - Member DOB
---	---

Adding a New IP Clinical Request – Adding Episode Details

The member Demographics section will auto populate. Follow the steps below to complete the **Episode Details** section.

The screenshot shows the Jiva web interface. At the top, there are navigation tabs: 'New Request', 'Search Request', and 'My Inbox'. Below this is the 'Demographics' section, which is partially visible. The 'Episode Details' section is highlighted with a red border and contains the following fields:

- * Episode Type: **Inpatient**
- * Referral Source: [-Select One--]
- * Episode Class: [-Select One-]
- Time Request: [Text Input]
- Do you Have Clinical Info?: Yes No
- * Urgency: [-----select-----]
- * Reason for Request: [-Select One--]
- Alternate Contact Phone/Fax: [Text Input]

Step	Action
1.	Select the appropriate source from the Referral Source drop down
2.	Select the appropriate class from the Episode Class drop down
3.	Select the appropriate urgency from the Urgency drop down
4.	Select the appropriate reason from the Reason for Request drop down
5.	Select the Yes radio button to the question “ Do you have clinical info ” Note - The system will offer an assessment (if available for the request) that may trigger the auto approval functionality.

Adding a New IP Clinical Request – Adding Diagnosis

You can add multiple diagnoses from this screen or you can utilize the Favorites icon  to save time and keystrokes. The **Favorites List** will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider’s account. Reference chapter 8 “Diagnosis Favorites List – How to Create a Favorites List.”



Step	Action						
1.	Select the appropriate code in the Code Type drop down						
2.	Type the diagnosis or code in the Diagnosis field or click the search icon  to initiate a search for the diagnosis						
3.	Click the Add button to add the diagnosis to the request						
4.	<table border="1"> <thead> <tr> <th>IF</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>you want to add additional diagnoses</td> <td> Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon  to remove a diagnosis from the request. - You can only change the primary diagnosis before you click the next button. Click the Star  in the Primary column on the diagnosis line to mark it as the primary diagnosis. </td> </tr> <tr> <td>you do not want to add additional diagnoses</td> <td>Go to step 5.</td> </tr> </tbody> </table>	IF	THEN	you want to add additional diagnoses	Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon  to remove a diagnosis from the request. - You can only change the primary diagnosis before you click the next button. Click the Star  in the Primary column on the diagnosis line to mark it as the primary diagnosis. 	you do not want to add additional diagnoses	Go to step 5.
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you want to add additional diagnoses	Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon  to remove a diagnosis from the request. - You can only change the primary diagnosis before you click the next button. Click the Star  in the Primary column on the diagnosis line to mark it as the primary diagnosis. 						
you do not want to add additional diagnoses	Go to step 5.						
5.	Click the Next button. Result - The Providers section will appear.						

Adding a New IP Clinical Request – Adding Providers

All Inpatient requests require a **Treating** provider (Facility) and an **Attending** physician. The provider search feature has separated these two provider types for all Inpatient requests.

- When searching for a **Treating** provider, the search results will only contain facilities.
- When searching for an **Attending** provider, the search results will only contain physicians.

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

	<p>Favorites List - You can utilize the Favorites icon  to save time and keystrokes. The Favorites List will allow you to create and manage a list of frequently used providers. Reference chapter 8 “Providers Favorites List–How to Create a Favorites List.”</p>
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Step	Action						
1.	<table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: center;">IF</th> <th style="text-align: center;">THEN</th> </tr> </thead> <tbody> <tr> <td>the facility you wish to attach to the request appears in the Treating drop down</td> <td> <ul style="list-style-type: none"> - Select the appropriate facility - Click the attach button </td> </tr> <tr> <td>the facility you wish to attach to the request does not appear in the Treating drop down</td> <td>Go to step 2.</td> </tr> </tbody> </table>	IF	THEN	the facility you wish to attach to the request appears in the Treating drop down	<ul style="list-style-type: none"> - Select the appropriate facility - Click the attach button 	the facility you wish to attach to the request does not appear in the Treating drop down	Go to step 2.
IF	THEN						
the facility you wish to attach to the request appears in the Treating drop down	<ul style="list-style-type: none"> - Select the appropriate facility - Click the attach button 						
the facility you wish to attach to the request does not appear in the Treating drop down	Go to step 2.						
2.	<p>Click on the search icon  to initiate the search.</p> <p>Result – The Search Providers window opens.</p>						

Adding a New IP Clinical Request – Adding Providers (con't)

Step	Action
3.	Type your search criteria in the appropriate fields
4.	Click the Search button
5.	<p>Click the attach icon  to add the provider to the request.</p> <p>Result – the facility will be added to the request.</p> <p>Notes:</p> <ul style="list-style-type: none"> – Click the  Deactivate icon to deactivate a facility – Click the  Activate icon to active a facility

 **Attending Provider** - Repeat steps 2 to 5 to add the Attending provider.

 **Saving Steps** – Since the process of adding the “Treating” and the “Attending” provider has been separated the system will auto assign the appropriate provider role. This results in fewer steps for you!

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.

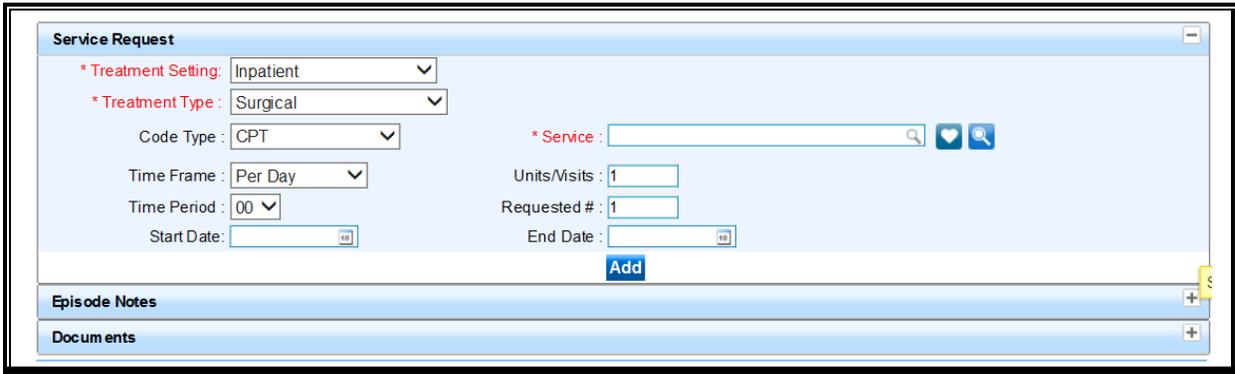
The screenshot shows a web form titled "Add Stay Request". It includes the following fields and controls:

- * Treatment Setting :** A dropdown menu currently showing "--Select One--".
- * Treatment Type :** A dropdown menu currently showing "--Select One--".
- * Admit Date :** A date selection field with a calendar icon.
- * LOS Requested # :** A text input field containing the number "0".
- Requested Level Of Care :** A dropdown menu currently showing "--Select One--".
- Save** button: A blue button located at the bottom right of the form.

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

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

When adding a procedure to an Inpatient request, you will need to address the “Services Request” section. You must click the “Show” icon  in the right hand corner to expand this section.



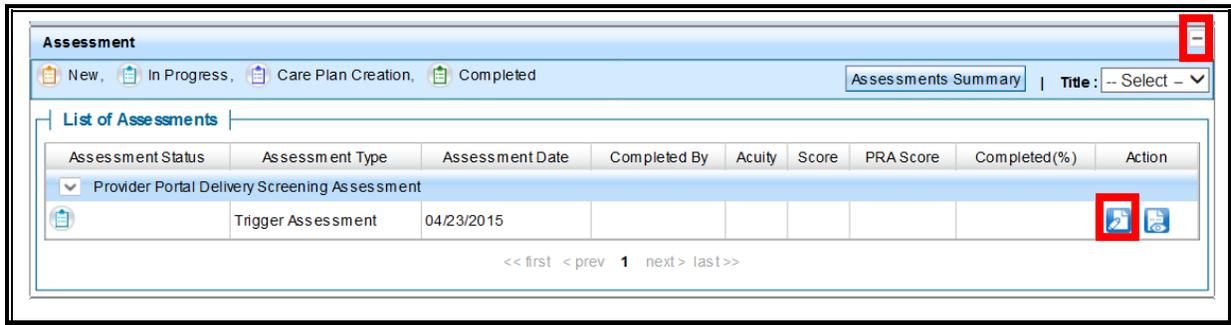
Step	Action
1.	To save time and keystrokes, the system will automatically default the “ Treatment Setting ” and the “ Treatment Type ” field since you have already addressed that information in the “Stay Request” section.
2.	Type the service code in the Service field or click the search icon  to initiate a search for the correct service
3.	The “ Units/Visits ” field defaults to “1,” but you have the ability to change it.
4.	Enter the Start Date
5.	Enter the End Date
6.	Click the Add button.



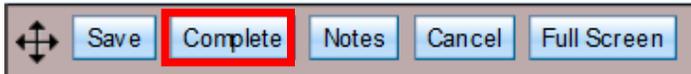
Click the “Show” icon  in the right hand corner of the “**Episode Notes**” and/or “**Documents**” sections to expand and add additional information to the request. Reference Chapter 8 for more information.

Adding a New IP Clinical Request – Adding Assessments

If there is an assessment available, it will appear in the list of assessments when you expand the section. You must click the “Show” icon  in the right hand corner to expand this section.



 The buttons at the bottom of the screen are to submit your request. **Do not** submit the request until you have marked the assessment as complete.

Step	Action
1.	Click on the edit assessment icon  to open and complete the assessment
2.	Answer the questions. Note - Questions in red are mandatory.
3.	Click the Complete button to trigger the auto approval rules.  Note - the Save button will not trigger the auto approval rules.

Adding a New IP Clinical Request – Submitting the Request

List of Assessments

Assessment Status	Assessment Type	Assessment Date	Completed By	Acuity	Score	PRA Score	Completed(%)	Action
Provider Portal Delivery Screening Assessment								
	Trigger Assessment	04/23/2015		1	7.0		36.84	
	Trigger Assessment							

<< first < prev 1 next > last >>

Episode Notes +

Documents +

Disclaimer

The case reference number you will receive is for identification purposes only. Authorization is based on medical necessity, is subject to member eligibility and applicable Plan benefit limitations. This is not a guarantee of payment. You must call back and confirm member eligibility and benefit availability 24 hours prior to the scheduled service.

Submit Request
Delete Request
View Abstract

Step	Action
1.	Click on the Submit Request button to submit your request.
2.	Click the OK button when asked “Do you want to Submit Request.” Note – The disclaimer window appears with the decision and cert number.

Expected Decision Date: 04/24/2015
Decision: Approved
Cert Number: 150400261
Authorization Type: IP

Disclaimer

The case reference number you will receive is for identification purposes only. Authorization is based on medical necessity, is subject to member eligibility and applicable Plan benefit limitations. This is not a guarantee of payment. You must call back and confirm member eligibility and benefit availability 24 hours prior to the scheduled service.

3 ENTER AN IP NONCLINICAL REQUEST

How to Enter an IP Nonclinical Request

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

The nonclinical 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**

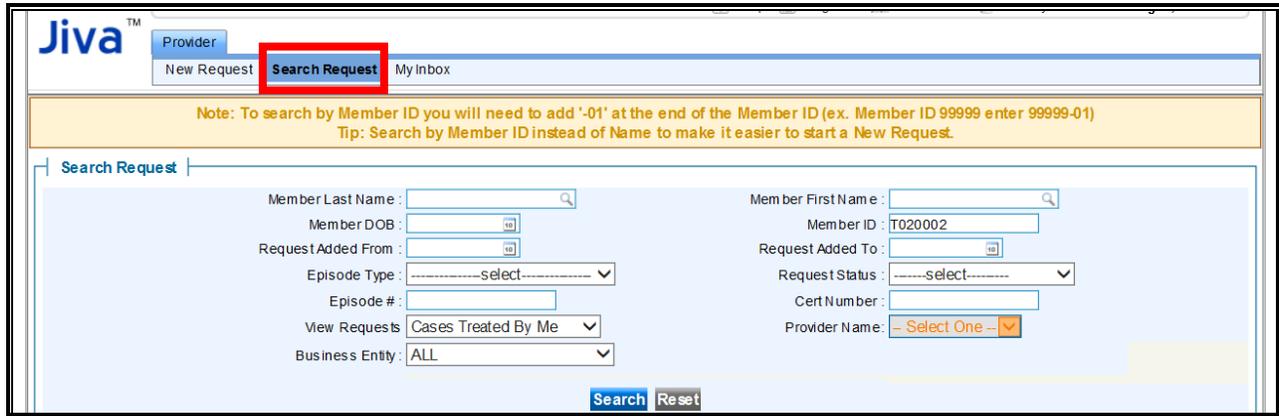


Requests where the clinical information is entered may auto approve based on what is requested and the information provided in the assessment.

Searching for a Member

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

	<h3>Duplicate Case Check and Alert</h3>
	<p>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.</p> <p>Jiva will not auto approve any case that is a possible duplicate. The request will be evaluated by the Utilization Management team.</p>



Step	Action
1.	Click on Search Request on the menu bar.
2.	Enter the “member ID” in the member ID field or the member’s name and DOB IMPORTANT – Please enter “-01” at the end of the member ID.
3.	Select “ Cases Treated By Me ” in the View Requests drop down.
4.	Verify that “ All ” is in the Business Entity field.
5.	Click the Search button and check for duplicate requests.
6.	Click the Add New Request button.
7.	Select Inpatient from the drop down Note – Adding a request from this screen auto populates the member’s data.

	<p>When searching by member’s name you must fill out all three of the following fields:</p> <ul style="list-style-type: none"> - Member Last Name - Member First Name - Member DOB
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Adding a new IP Nonclinical Request – Adding Episode Details

The member Demographics section will auto populate. Follow the steps below to complete the **Episode Details** section.

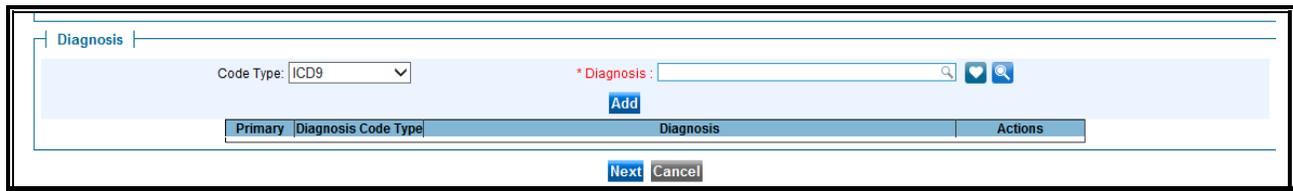
The screenshot shows the Jiva web application interface. At the top, there are navigation tabs: 'New Request', 'Search Request', and 'My Inbox'. Below this, the 'Demographics' section is populated with member information: Member Name (Test, Keystone Connect), Member ID (T020002), DOB (09/22/1989), Gender, Product Type (Medicaid/Medicaid Program of MI), Effective Date (09/01/2014), and Termination Date. The 'Episode Details' section, highlighted with a red border, contains the following fields:

- * Episode Type: Inpatient
- * Referral Source: [-Select One--]
- * Episode Class: [-Select One--]
- Time Request: [Text Input]
- Do you Have Clinical Info?: Yes No
- * Urgency: [-----select-----]
- * Reason for Request: [-Select One--]
- Alternate Contact Phone/Fax: [Text Input]

Step	Action
1.	Select the appropriate source from the Referral Source drop down
2.	Select the appropriate class from the Episode Class drop down
3.	Select the appropriate urgency from the Urgency drop down
4.	Select the appropriate reason from the Reason for Request drop down
5.	Select the No radio button to the question “ Do you have clinical info ” Note - the system will treat this as a non clinical request and will not offer any assessments that are used in the auto approval process.

Adding a new IP Nonclinical Request – Adding Diagnosis

You can add multiple diagnoses from this screen or you can utilize the Favorites icon  to save time and keystrokes. The “Favorites List” will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider’s account. Reference chapter 8 “Diagnosis Favorites List – How to Create a Favorites List.”



Step	Action						
1.	Select the appropriate code in the Code Type drop down						
2.	Type the diagnosis code in the Diagnosis field or click the search icon  to initiate a search for the correct diagnosis						
3.	Click the Add button to add the diagnosis to the request						
4.	<table border="1"> <thead> <tr> <th>IF</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>you want to add additional diagnoses</td> <td> Repeat steps 2 and 3. Note: - Click the remove icon  to remove a diagnosis from the request. - You can only change the primary diagnosis before you click the next button. Click the Star  in the Primary column on the diagnosis line to mark it as the primary diagnosis. </td> </tr> <tr> <td>you do not want to add additional diagnoses</td> <td>Go to step 5.</td> </tr> </tbody> </table>	IF	THEN	you want to add additional diagnoses	Repeat steps 2 and 3. Note: - Click the remove icon  to remove a diagnosis from the request. - You can only change the primary diagnosis before you click the next button. Click the Star  in the Primary column on the diagnosis line to mark it as the primary diagnosis.	you do not want to add additional diagnoses	Go to step 5.
IF	THEN						
you want to add additional diagnoses	Repeat steps 2 and 3. Note: - Click the remove icon  to remove a diagnosis from the request. - You can only change the primary diagnosis before you click the next button. Click the Star  in the Primary column on the diagnosis line to mark it as the primary diagnosis.						
you do not want to add additional diagnoses	Go to step 5.						
5.	Click the Next button. Result - The Providers section will appear.						

Adding a new IP Nonclinical Request – Adding Providers

All Inpatient requests require a **Treating** provider (Facility) and an **Attending** physician. The provider search feature has separated these two provider types for all Inpatient requests.

- When searching for a **Treating** provider, the search results will only contain facilities.
- When searching for an **Attending** provider. The search results will only contain physician/physician groups.

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

	<p>Favorites List - You can utilize the Favorites icon  to save time and keystrokes. The “Favorites List” will allow you to create and manage a list of frequently used facilities. Reference chapter 8 “Providers Favorites List–How to Create a Favorites List.”</p>
---	---



The screenshot shows a 'Providers' section with three rows. The first row is for the 'Treating' provider, with 'Healthcare INC' selected and an 'Attach' button. The second row is for the 'Attending' provider. The third row is for the 'Other provider'. Each row has a search icon and a message that says 'no providers attached to this episode'.

Step	Action	
1.	IF	THEN
	the facility you wish to attach to the request appears in the Treating drop down	<ul style="list-style-type: none"> - Select the appropriate facility - Click the attach button
	the facility you wish to attach to the request does not appear in the Treating drop down	Go to step 2.
2.	Click on the search icon  to initiate the search. Result – The Search Providers window opens.	

Adding a new IP Nonclinical Request – Adding Providers (con't)

Favorite Attending

Search Providers

Note: To perform a quick search, please enter few characters for Last Name or First Name
 E.g. Enter at least three characters in First/Last Name to search for a Provider. The system will auto populate the content as characters are entered.

Business Entity:

Provider Last Name:

NPIN (National Provider Identification Number):

Tax ID:

Provider First Name:

Provider ID:

Search Results

Provider Name	Provider ID	Address	Tax ID	Termination Date	NPIN	Participation Status	Provider Network	Actions
Flintstone, Fred	123	1313 Mocking Bird lane Munster, YZ 12345	123		123	Par	INNNETWORK	 

Step	Action
3.	Type your search criteria in the appropriate fields
4.	Click the Search button
5.	<p>Click the attach icon  to add the provider to the request.</p> <p>Result – the facility will be added to the request.</p> <p>Notes:</p> <ul style="list-style-type: none"> – Click the  Deactivate icon to deactivate a facility – Click the  Activate icon to activate a facility



Attending Provider - Repeat steps 2 to 5 to add the Attending provider.



Saving Steps – Since the process of adding the “Treating” and the “Attending” provider has been separated the system will auto assign the appropriate provider role. This results in fewer steps for you!

Adding a new IP Nonclinical 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.

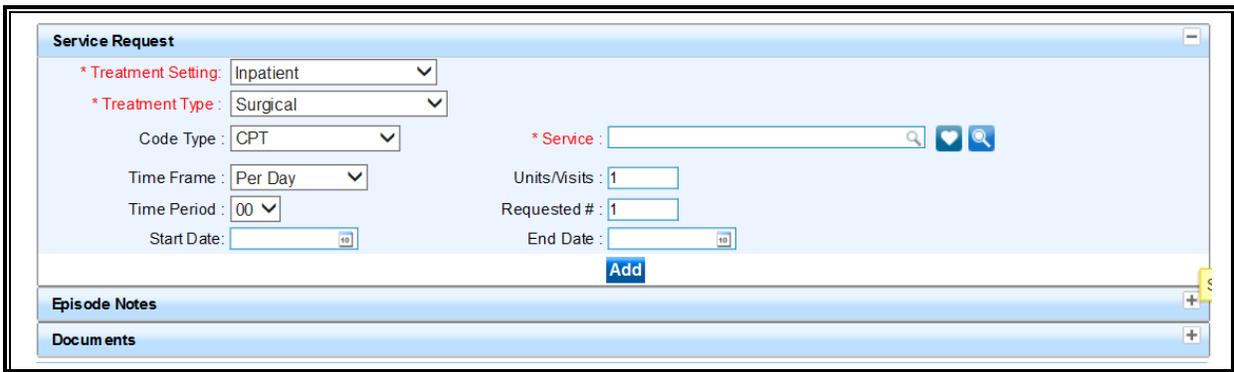
The screenshot shows a web form titled "Add Stay Request". It includes the following fields:

- Treatment Setting:** A dropdown menu with "--Select One--" selected.
- Treatment Type:** A dropdown menu with "--Select One--" selected.
- Admit Date:** A date selection field with a calendar icon.
- LOS Requested #:** A text input field containing the number "0".
- Requested Level Of Care:** A dropdown menu with "--Select One--" selected.
- Save:** A blue button at the bottom right.

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

Adding a new IP Nonclinical Request – Adding Service Request (if applicable)

When adding a procedure to an Inpatient request, you will need to address the “Services Request” section. You must click the “Show” icon  in the right hand corner to expand this section.



Step	Action
1.	To save time and keystrokes, the system will automatically default the “ Treatment Setting ” and the “ Treatment Type ” field since you have already addressed that information in the “Stay Request” section.
2.	Type the service code in the Service field or click the search icon  to initiate a search for the correct service
3.	The “ Units/Visits ” field defaults to “1,” but you have the ability to change it.
4.	Enter the Start Date
5.	Enter the End Date
6.	Click the Add button.



Click the “Show” icon  in the right hand corner of the “**Episode Notes**” and/or “**Documents**” sections to expand and add additional information to the request. Reference Chapter 8 for more information.

Adding a new IP Nonclinical Request – Saving the Request

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

The screenshot shows a web interface with a blue header bar containing three expandable sections: 'Service Request', 'Episode Notes', and 'Documents'. Below these is a 'Disclaimer' section with the following text: 'The case reference number you will receive is for identification purposes only. Authorization is based on medical necessity, is subject to member eligibility and applicable Plan benefit limitations. This is not a guarantee of payment. You must call back and confirm member eligibility and benefit availability 24 hours prior to the scheduled service.' At the bottom of the interface, there are three buttons: 'Save Request' (highlighted with a red box), 'Delete Request', and 'View Abstract'.

Step	Action
1.	Click on the Save Request button to save your request.
2.	Click the OK button when asked “Do you want to Save this Request.” Note – The disclaimer window appears with the cert number.

The screenshot shows a confirmation message at the top: 'Request has been saved successfully. [Dismiss this message](#)'. Below this is a white box with a red border containing the following information: 'Member Name : Blush, Betty Helathy PA', 'Expected Decision Date:', 'Decision: -', 'Cert Number: 150400297', and 'Authorization Type: IP'. Below the white box is a blue bar with the word 'Disclaimer' in white text. At the bottom, the same disclaimer text from the previous screenshot is visible: 'The case reference number you will receive is for identification purposes only. Authorization is based on medical necessity, is subject to member eligibility and applicable Plan benefit limitations. This is not a guarantee of payment. You must call back and confirm member eligibility and benefit availability 24 hours prior to the scheduled service.'

4 ADD CLINICAL TO AN EXISTING IP REQUEST

How to Add Clinical Information to an Existing IP Nonclinical Request

You **must complete** the following steps:

- Edit Episode Details section (Do you have clinical Yes)
- Add assessment
- Submit request.

Search for an Existing Request

The screenshot shows the Jiva web application interface. At the top, there is a navigation bar with 'New Request', 'Search Request', and 'My Inbox' buttons. The 'Search Request' button is highlighted with a red box. Below the navigation bar, there is a search form with various fields: Member Last Name, Member DOB, Request Added From, Episode Type, Episode #, View Requests (Cases Treated By Me), Business Entity, Member First Name, Member ID, Request Added To, Request Status, Cert Number (130500280), and Provider Name. A 'Search' button is at the bottom of the form. Below the search form, there is a table titled 'Request Search Results' with columns: Episode ID, Member Name, Episode Type, Request Submit Date, Cert Number, Diagnosis, Submitted By, Status, Decision, and Actions. The first row of the table is highlighted in red, showing Episode ID 24739, Member Name Alamode, Pte, and Episode Type IP.

Step	Action								
1.	Click Search Request on the menu bar from the dashboard.								
2.	Enter the “certification number” in the Cert Number field. Note – You can also search using the member ID or name/DOB.								
3.	Select “ Cases Treated By Me ” from the View Requests drop down box. <table border="1" data-bbox="323 1203 1523 1419"> <thead> <tr> <th>View Request Options</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>PCP Cases</td> <td>displays requests for members associated with doctor’s panel</td> </tr> <tr> <td>Cases treated by me</td> <td>displays requests associated with the selected business entity</td> </tr> <tr> <td>Cases submitted by me</td> <td>displays requests entered by the person who is logged in</td> </tr> </tbody> </table>	View Request Options	Description	PCP Cases	displays requests for members associated with doctor’s panel	Cases treated by me	displays requests associated with the selected business entity	Cases submitted by me	displays requests entered by the person who is logged in
View Request Options	Description								
PCP Cases	displays requests for members associated with doctor’s panel								
Cases treated by me	displays requests associated with the selected business entity								
Cases submitted by me	displays requests entered by the person who is logged in								
4.	Select your Business Entity from the drop down box.								
5.	Click the Search button.								
6.	Locate the case to which you wish to add clinical information.								
7.	Click on the hyperlink in the Episode Type column to access the request								

	If the search results do not reveal the case you are looking for, you can start a new request by clicking on the Add New Request button.
---	---

Adding Clinical Information to an Existing IP Nonclinical Request – Episode Details

Submit Request Delete Request Episode ID: 40854

Demographics

Member Name: Test, Keystone Connect Member ID: T020002 DOB: 09/22/1989
 Gender: Product Type: Medicaid(Medicaid Program of MI) Effective Date: 09/01/2014 Termination Date:
 Group: Keystone Connect

Episode Details

Episode Type: Inpatient Referral Source: Emergency **Edit**
 Episode Class: Admission Urgency: Standard Time Request: 24 Hours
 Reason For Request: Court Mandated Alternative Contact Phone/Fax: Do you have Clinical Info: Yes

Step	Action
1.	Click the Edit hyperlink in the Episode Details section. Result – the Edit Request window will appear.

Edit Request

Episode Details

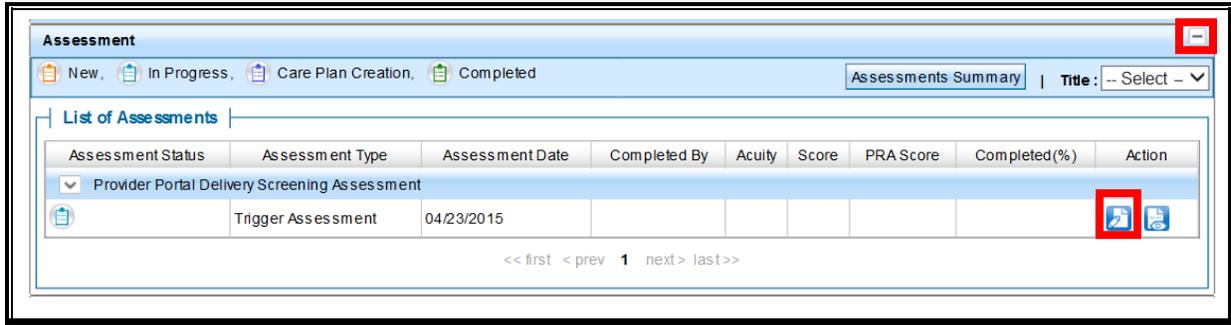
* Episode Type: Inpatient
 * Referral Source: Emergency
 * Episode Class: Admission
 Time Request: 24 Hours
 * Urgency: Standard
 * Reason for Request: Court Mandated
 Alternate Contact Phone/Fax:
 Do you Have Clinical Info?: Yes No

Save Cancel

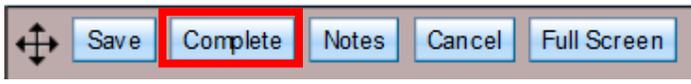
Step	Action
2.	Select the Yes radio button to the question “ Do you have clinical info ” Note - The system will offer an assessment if available for the request that may trigger the auto approval functionality.
3.	Click the Save button
4.	Click the “ Show ” icon  to expand the Assessment section.

Adding Clinical Information to an Existing IP Nonclinical Request – Assessment

If there is an assessment available, it will appear in the list of assessments when you expand the section. You must click the “Show” icon  in the right hand corner to expand this section.



The buttons at the bottom of the screen are to submit your request. Do not submit the request until you have marked the assessment as complete.

Step	Action
1.	Click on the edit assessment icon  to open and complete the assessment
2.	Answer the questions. Note - Questions in red are mandatory.
3.	Click the Complete button to trigger the auto approval rules.  Note - the Save button will not trigger the auto approval rules.

Adding Clinical Information to an Existing IP Nonclinical Request – Submit Request

List of Assessments

Assessment Status	Assessment Type	Assessment Date	Completed By	Acuity	Score	PRA Score	Completed(%)	Action
Provider Portal Delivery Screening Assessment								
	Trigger Assessment	04/23/2015		1	7.0		36.84	
	Trigger Assessment							

<< first < prev 1 next > last >>

Episode Notes +

Documents +

Disclaimer

The case reference number you will receive is for identification purposes only. Authorization is based on medical necessity, is subject to member eligibility and applicable Plan benefit limitations. This is not a guarantee of payment. You must call back and confirm member eligibility and benefit availability 24 hours prior to the scheduled service.

Submit Request
Delete Request
View Abstract

Step	Action
1.	Click on the Submit Request button to submit your request.
2.	Click the OK button when asked “Do you want to Submit Request.”
	Note – The disclaimer window appears with the decision and cert number.

Expected Decision Date: 04/24/2015
Decision: Approved
Cert Number: 150400261
Authorization Type: IP

Disclaimer

The case reference number you will receive is for identification purposes only. Authorization is based on medical necessity, is subject to member eligibility and applicable Plan benefit limitations. This is not a guarantee of payment. You must call back and confirm member eligibility and benefit availability 24 hours prior to the scheduled service.

5 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 nonclinical request where the clinical information can be added at a later time.

The steps below outline how to enter an OP clinical request. Reference chapter 6 “How to Enter an OP Nonclinical Request” and Chapter 7 “How to Add Clinical Information to an Existing OP Nonclinical Request” for more information.

When entering a **clinical** request, you **must complete** the following steps:

- **Episode Details**
- **Diagnosis- primary a must, secondary is optional**
- **Providers**
- **Add Service request**
- **Assessment (if triggered)**

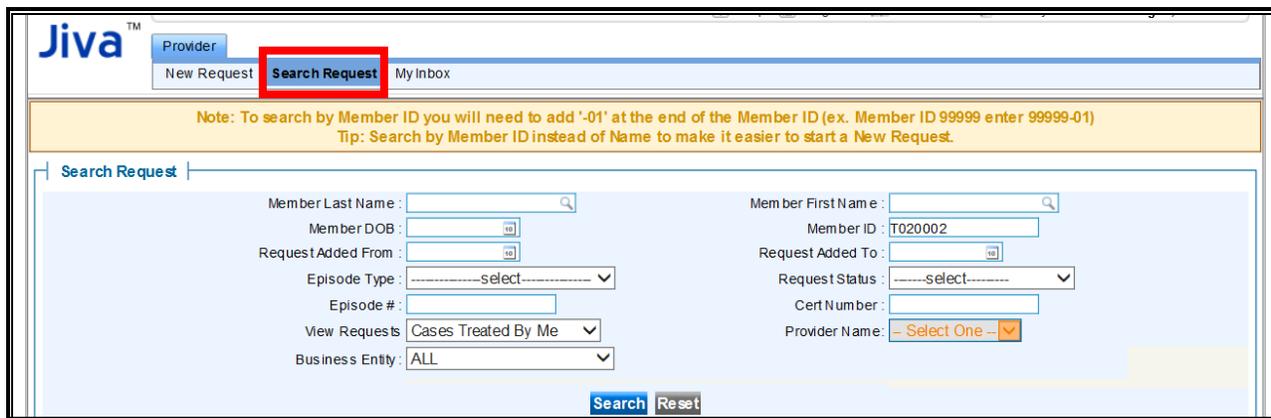


Requests where the clinical information is entered may auto approve based on what is requested and the information provided in the assessment.

Searching for a Member

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

	<h3>Duplicate Case Check and Alert</h3>
	<p>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.</p> <p>Jiva will not auto approve any case that is a possible duplicate. The request will be evaluated by the Utilization Management team.</p>



Step	Action
1.	Click on Search Request on the menu bar.
2.	Enter the “member ID” in the member ID field or the member’s name and DOB. IMPORTANT – Please enter “-01” at the end of the member ID.
3.	Select “ Cases Treated By Me ” in the View Requests drop down.
4.	Verify that “ All ” is in the Business Entity field.
5.	Click the Search button and search for duplicate requests.
6.	Click the Add New Request button.
7.	Select Outpatient from the drop down Note – Adding a request from this screen auto populates the member’s data.

	<p>When searching by member’s name you must fill out all three of the following fields:</p> <ul style="list-style-type: none"> - Member Last Name - Member First Name - Member DOB
---	---

Adding a New OP Clinical Request – Adding Episode Details

The member Demographics section will auto populate. Follow the steps below to complete the **Episode Details** section.

The screenshot shows the Jiva system interface. The 'Demographics' section is populated with the following information:

- Member Name: Test, Keystone Connect
- Member ID: T020002
- DOB: 09/22/1989
- Gender:
- Product Type: Medicaid(Medicaid Program of MI)
- Effective Date: 09/01/2014
- Termination Date:
- Group: [Keystone Connect](#)

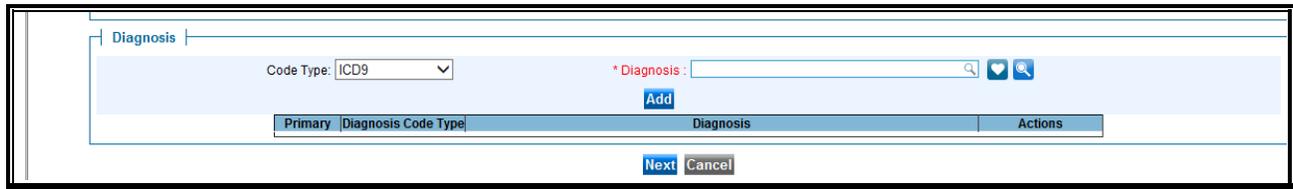
The 'Episode Details' section, highlighted with a red box, contains the following fields:

- * Episode Type: **Outpatient**
- * Referral Source: --Select One--
- * Episode Class: --Select One--
- * Urgency: -----select-----
- * Reason for Request: --Select One--
- Time Request: [input field]
- Do you Have Clinical Info? Yes No
- Alternate Contact Phone/Fax: [input field]

Step	Action
1.	Select the appropriate source from the Referral Source drop down menu
2.	Select the appropriate class from the Episode Class drop down menu
3.	Select the appropriate urgency from the Urgency drop down menu
4.	Select the appropriate reason from the Reason for Request drop down menu
5.	Select the Yes radio button to the question “ Do you have clinical info ”
	Note - The system will offer an assessment if available for the request that may trigger the auto approval functionality.

Adding a New OP Clinical Request – Adding Diagnosis

You can add multiple diagnoses from this screen or you can utilize the Favorites icon  to save time and keystrokes. The “Favorites List” will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider’s account. Reference chapter 8 “Diagnosis Favorites List – How to Create a Favorites List.”



Step	Action						
1.	Select the appropriate code in the Code Type drop down						
2.	Type the diagnosis code in the Diagnosis field or click the search icon  to initiate a search for the correct diagnosis						
3.	Click the Add button to add the diagnosis to the request						
4.	<table border="1"> <thead> <tr> <th>IF</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>you want to add additional diagnoses</td> <td> Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon  to remove a diagnosis from the request. - You can only change the primary diagnosis before you click the next button. Click the Star  in the Primary column on the diagnosis line to mark it as the primary diagnosis. </td> </tr> <tr> <td>you do not want to add additional diagnoses</td> <td>Go to step 5.</td> </tr> </tbody> </table>	IF	THEN	you want to add additional diagnoses	Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon  to remove a diagnosis from the request. - You can only change the primary diagnosis before you click the next button. Click the Star  in the Primary column on the diagnosis line to mark it as the primary diagnosis. 	you do not want to add additional diagnoses	Go to step 5.
IF	THEN						
you want to add additional diagnoses	Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon  to remove a diagnosis from the request. - You can only change the primary diagnosis before you click the next button. Click the Star  in the Primary column on the diagnosis line to mark it as the primary diagnosis. 						
you do not want to add additional diagnoses	Go to step 5.						
5.	Click the Next button. Result - The Providers section will appear.						

Adding a New OP Clinical Request – Adding Providers

Providers |

Search Provider

no providers attached to this episode

Step	Action
1.	<p>Click the Search Provider button</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <p>Favorites List - You can utilize the Favorites icon  to save time and keystrokes. The “Favorites List” will allow you to create and manage a list of frequently used providers. Reference chapter 8 “Providers Favorites List–How to Create a Favorites List.”</p> </div>

Favorite Provider Search

Search Providers |

Note: To perform a quick search, please enter few characters for Last Name or First Name
E.g Enter at least three characters in First/Last Name to search for a Provider. The system will auto populate the content as characters are entered.

Business Entity: ALL

Provider Last Name:

Provider First Name:

NPIN (National Provider Identification Number):

Tax ID:

Provider ID:

Search Reset

Search Results |

Provider Name	Address	Type	Tax ID	Termination Date	NPIN	Provider ID	LOB	Participation Status	Provider Network	Provider Role	Actions
Flintstone, Fred	1313 Mocking Bird lane Munster, YZ 123	Group	123			123		Par	INNETWORK	--Select One--	 

Step	Action
2.	Type your search criteria in the appropriate fields
3.	<p>Click the Search button</p> <p>Note – If the provider is not found, go back to your search criteria and select “all” from the Business Entity drop down box.</p>

Adding a New OP Clinical Request – Adding Providers (con't)

Favorite Provider Search

Search Providers

Note: To perform a quick search, please enter few characters for Last Name or First Name
E.g Enter at least three characters in First/Last Name to search for a Provider. The system will auto populate the content as characters are entered.

Business Entity:

Provider Last Name:

Provider First Name:

NPIN (National Provider Identification Number):

Tax ID:

Search Reset

Search Results

Provider Name	Address	Type	Tax ID	Termination Date	NPIN	Provider ID	LOB	Participation Status	Provider Network	Provider Role	Actions
Flintstone, Fred	1313 Mocking Bird lane Munster, YZ 123	Group	123			123		Par	INNETWORK	--Select One--	

Step	Action
4.	Select the appropriate role from the Provider Role drop down Note - Assigning the wrong role will result in claims payment issues.
5.	Click the attach icon to add the provider to the request.

OP Request	
Treating	The provider who is providing the service
Referring	The physician or group
Example: For a home care request, attach the Treating role to the home care agency	

	Repeat steps 1 to 5 to add additional providers.
--	--

	If you need to change the provider role, reference “ How to Change the Provider’s Role ” on the next page.
--	---

How to Change the Provider's Role

If you attached the correct provider, but have an incorrect provider role follow the steps outlined below to make the correction.



Name	Service Location	Phone	Provider ID	Provider Role	Network Status	Specialty	Fax	Termination Date	Actions
Fred Flintstone Hospital	1313 Mocking Bird lane Munster, YZ 12	2157627000	12312	Treating  Treating		Hospital	123123215		

Step	Action
1.	Click the modify icon  under the provider you wish to change.
2.	Select the correct role from the drop down box.
3.	Click the Save button to save your changes.

Adding a New OP Clinical Request – Adding Service Request

Service Request

* **Treatment Setting:** --Select One--

* **Treatment Type:** --Select One--

Code Type: CPT

Time Frame: Per Day

Time Period: 00

Start Date:

* **Service:**   

Units/Visits: 0

Requested #: 1

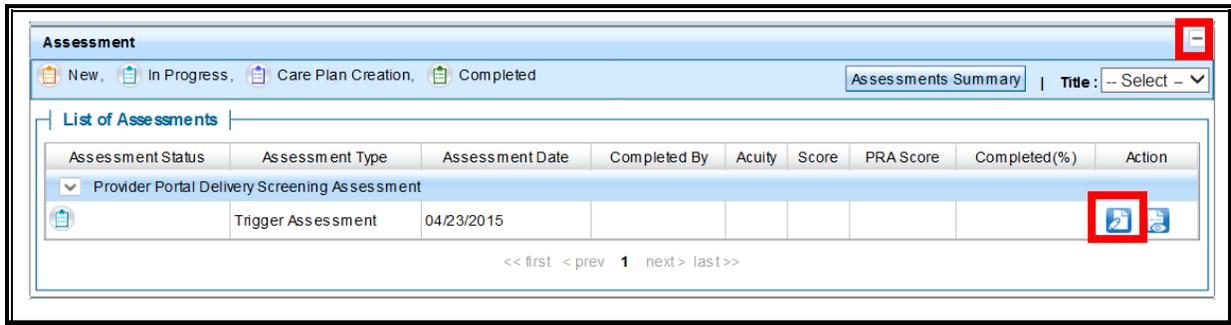
End Date:

Add

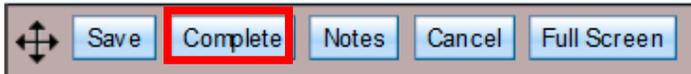
Step	Action
1.	Select the appropriate choice in the Treatment Setting drop down
2.	Select the appropriate choice in the Treatment Type drop down
3.	Type the service code in the Service field or click the search icon  to initiate a search for the correct service
4.	The “ Units/Visits ” field defaults to “0,” but you have the ability to change it.
5.	Enter the Start Date
6.	Enter the End Date
7.	Click the Add button.

Adding a New OP Clinical Request – Adding Assessments

If there is an assessment available, it will appear in the list of assessments when you expand the section. You must click the “Show” icon  in the right hand corner to expand this section.



 The buttons at the bottom of the screen are to submit your request. Don't submit the request until you have marked the assessment as complete.

Step	Action
1.	Click on the edit assessment icon  to open and complete the assessment
2.	Answer the questions. Note - Questions in red are mandatory.
3.	Click the Complete button to trigger the auto approval rules.  Note - the Save button will not trigger the auto approval rules.

 Click the “Show” icon  in the right hand corner of the “**Notes**” and/or “**Documents**” sections to expand and add additional information to the request. Reference Chapter 8 for more information.

Adding a New OP Clinical Request – Submitting the Request

List of Assessments

Assessment Status	Assessment Type	Assessment Date	Completed By	Acuity	Score	PRA Score	Completed(%)	Action
Provider Portal Delivery Screening Assessment								
	Trigger Assessment	04/23/2015		1	7.0		36.84	
	Trigger Assessment							

<< first < prev 1 next > last >>

Episode Notes +

Documents +

Disclaimer

The case reference number you will receive is for identification purposes only. Authorization is based on medical necessity, is subject to member eligibility and applicable Plan benefit limitations. This is not a guarantee of payment. You must call back and confirm member eligibility and benefit availability 24 hours prior to the scheduled service.

Submit Request
Delete Request
View Abstract

Step	Action
1.	Click on the Submit Request button to submit your request.
2.	Click the OK button when asked “Do you want to Submit Request.” Note – The disclaimer window appears with the decision and cert number.

Request has been submitted successfully [Dismiss this message](#)

Member Name : Test,Keystone Connect
 Expected Decision Date: 06/07/2015
 Decision: Pending
 Cert Number: 150600031
 Authorization Type: OP

Disclaimer

The case reference number you will receive is for identification purposes only. Authorization is based on medical necessity, is subject to member eligibility and applicable Plan benefit limitations. This is not a guarantee of payment. You must call back and confirm member eligibility and benefit availability 24 hours prior to the scheduled service.

6 ENTER AN OP NON-CLINICAL REQUEST

How to Enter an OP Nonclinical Request

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

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

You **must at least complete** the following steps for a nonclinical request:

- **Episode Details**
- **Diagnosis- primary a must, secondary is optional**
- **Providers**
- **Add Service request**

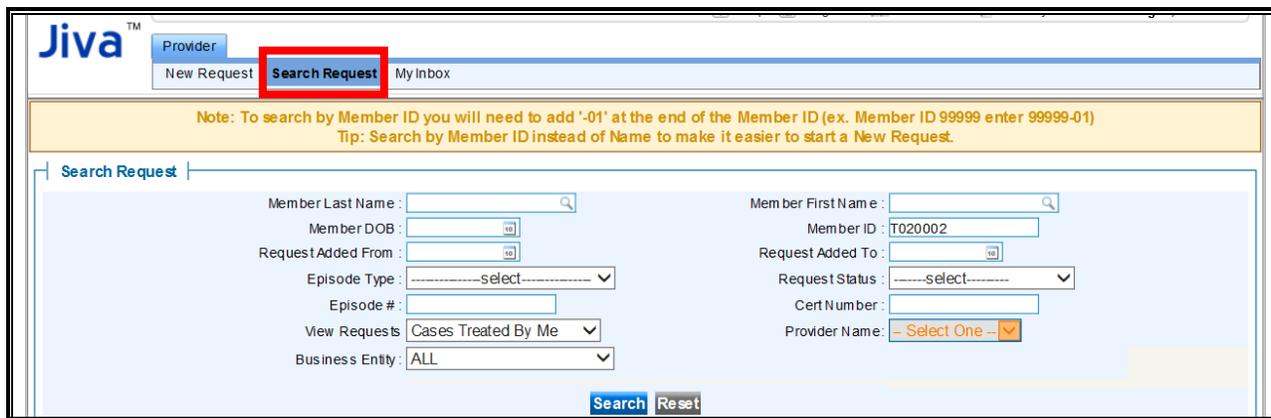


Requests where the clinical information is entered may auto approve based on what is requested and the information provided in the assessment.

Searching for a Member

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

	<h3>Duplicate Case Check and Alert</h3> <p>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.</p> <p>Jiva will not auto approve any case that is a possible duplicate. The request will be evaluated by the Utilization Management team.</p>
---	---



Step	Action
1.	Click on Search Request on the menu bar.
2.	Enter the “member ID” in the member ID field or the member’s name and DOB IMPORTANT – Please enter “-01” at the end of the member ID.
3.	Select “ Cases Treated By Me ” in the View Requests drop down menu.
4.	Verify that “ All ” is in the Business Entity field.
5.	Click the Search button and search for duplicate requests.
6.	Click the Add New Request button.
7.	Select Outpatient from the drop down menu Note – Adding a request from this screen auto populates the member’s data.

	<p>When searching by member’s name you must fill out all three of the following fields:</p> <ul style="list-style-type: none"> - Member Last Name - Member First Name - Member DOB
---	---

Adding a New OP NonClinical Request – Adding Episode Details

The member Demographics section will auto populate. Follow the steps below to complete the **Episode Details** section.

The screenshot shows the Jiva web application interface. The top navigation bar includes 'Provider', 'New Request', 'Search Request', and 'My Inbox'. Below this, the 'Demographics' section is populated with the following information:

- Member Name: Test, Keystone Connect
- Member ID: T020002
- DOB: 09/22/1989
- Gender:
- Product Type: Medicaid(Medicaid Program of MI)
- Effective Date: 09/01/2014
- Termination Date:
- Group: [Keystone Connect](#)

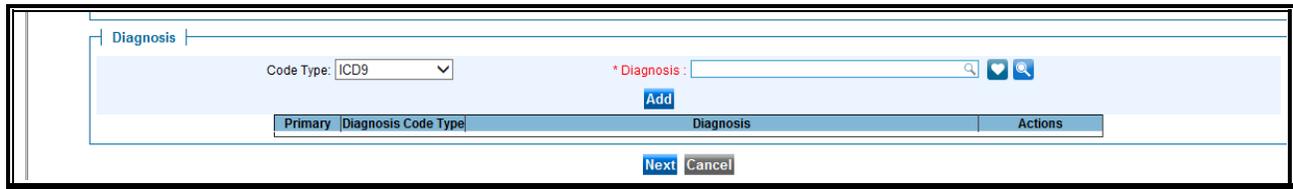
The 'Episode Details' section, highlighted with a red box, contains the following fields:

- * Episode Type: **Outpatient**
- * Referral Source: --Select One--
- * Episode Class: --Select One--
- * Urgency: -----select-----
- * Reason for Request: --Select One--
- Time Request: [input field]
- Do you Have Clinical Info?: Yes No
- Alternate Contact Phone/Fax: [input field]

Step	Action
1.	Select the appropriate source from the Referral Source drop down menu
2.	Select the appropriate class from the Episode Class drop down menu
3.	Select the appropriate urgency from the Urgency drop down menu
4.	Select the appropriate reason from the Reason for Request drop down menu
5.	Select the No radio button to the question “ Do you have clinical info ”
	Note - The system will offer an assessment if available for the request that may trigger the auto approval functionality.

Adding a New OP NonClinical Request – Adding Diagnosis

You can add multiple diagnoses from this screen or you can utilize the Favorites icon  to save time and keystrokes. The “Favorites List” will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider’s account. Reference chapter 8 “Diagnosis Favorites List – How to Create a Favorites List.”



Step	Action						
1.	Select the appropriate code in the Code Type drop down menu						
2.	Type the diagnosis code in the Diagnosis field or click the search icon  to initiate a search for the correct diagnosis						
3.	Click the Add button to add the diagnosis to the request						
4.	<table border="1"> <thead> <tr> <th>IF</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>you want to add additional diagnoses</td> <td> Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon  to remove a diagnosis from the request. - You can only change the primary diagnosis before you click the next button. Click the Star  in the Primary column on the diagnosis line to mark it as the primary diagnosis. </td> </tr> <tr> <td>you do not want to add additional diagnoses</td> <td>Go to step 5.</td> </tr> </tbody> </table>	IF	THEN	you want to add additional diagnoses	Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon  to remove a diagnosis from the request. - You can only change the primary diagnosis before you click the next button. Click the Star  in the Primary column on the diagnosis line to mark it as the primary diagnosis. 	you do not want to add additional diagnoses	Go to step 5.
IF	THEN						
you want to add additional diagnoses	Repeat steps 2 and 3. Note: <ul style="list-style-type: none"> - Click the remove icon  to remove a diagnosis from the request. - You can only change the primary diagnosis before you click the next button. Click the Star  in the Primary column on the diagnosis line to mark it as the primary diagnosis. 						
you do not want to add additional diagnoses	Go to step 5.						
5.	Click the Next button. Result - The Providers section will appear.						

Adding a New OP NonClinical Request – Adding Providers

Step	Action
1.	<p>Click the Search Provider button</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Favorites List - You can utilize the Favorites icon to save time and keystrokes. The “Favorites List” will allow you to create and manage a list of frequently used providers. Reference chapter 8 “Providers Favorites List–How to Create a Favorites List.”</p> </div>

Provider Name	Address	Type	Tax ID	Termination Date	NPIN	Provider ID	LOB	Participation Status	Provider Network	Provider Role	Actions
Flintstone, Fred	1313 Mocking Bird lane Munster, YZ 123	Group	123			123		Par	INNETWORK	--Select One--	

Step	Action
2.	Type your search criteria in the appropriate fields
3.	<p>Click the Search button</p> <p>Note – If the provider is not found, go back to your search criteria and select “all” from the Business Entity drop down box.</p>

Adding a New OP NonClinical Request – Adding Providers (con't)

Favorite Provider Search

Search Providers

Note: To perform a quick search, please enter few characters for Last Name or First Name
E.g Enter at least three characters in FirstLast Name to search for a Provider. The system will auto populate the content as characters are entered.

Business Entity:

Provider Last Name:

Provider First Name:

NPIN (National Provider Identification Number):

Tax ID:

Search Reset

Search Results

Provider Name	Address	Type	Tax ID	Termination Date	NPIN	Provider ID	LOB	Participation Status	Provider Network	Provider Role	Actions
Flintstone, Fred	1313 Mocking Bird lane Munster, YZ 123	Group	123			123		Par	INNETWORK	--Select One--	 

Step	Action
4.	Select the appropriate role from the Provider Role drop down menu Note - Assigning the wrong role will result in claims payment issues.
5.	Click the attach icon  to add the provider to the request.

OP Request	
Treating	The provider who is providing the service
Referring	The physician or group
Example: For a home care request, attach the Treating role to the home care agency	

	Repeat steps 1 to 5 to add additional providers.
---	--

	If you need to change the provider role, reference “ How to Change the Provider’s Role ” on the next page.
---	---

How to Change the Provider's Role

If you attached the correct provider, but have an incorrect provider role by following the steps outlined below.



Name	Service Location	Phone	Provider ID	Provider Role	Network Status	Specialty	Fax	Termination Date	Actions
Fred Flintstone Hospital	1313 Mocking Bird lane Munster, YZ 12	2157627000	12312	Treating  Treating		Hospital	123123215		

Step	Action
1.	Click the modify icon  under the provider you wish to change.
2.	Select the correct role from the drop down box.
3.	Click the Save button to save your changes.

Adding a New OP NonClinical Request – Adding Service Request

Step	Action
1.	Select the appropriate choice in the Treatment Setting drop down menu
2.	Select the appropriate choice in the Treatment Type drop down menu
3.	Type the service code in the Service field or click the search icon  to initiate a search for the correct service
4.	The “ Units/Visits ” field defaults to “0,” but you have the ability to change it.
5.	Enter the Start Date
6.	Enter the End Date
7.	Click the Add button.

	<p>Click the “Show” icon  in the right hand corner of the “Notes” and/or “Documents” sections to expand and add additional information to the request. Reference Chapter 8 for more information.</p>
---	---

Adding a new OP Nonclinical Request – Saving the Request

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

The screenshot shows a web interface with a sidebar on the left containing 'Service Request', 'Episode Notes', and 'Documents', each with a plus sign. The main content area has a blue header 'Disclaimer' and a paragraph of text: 'The case reference number you will receive is for identification purposes only. Authorization is based on medical necessity, is subject to member eligibility and applicable Plan benefit limitations. This is not a guarantee of payment. You must call back and confirm member eligibility and benefit availability 24 hours prior to the scheduled service.' Below the text are three buttons: 'Save Request' (highlighted with a red box), 'Delete Request', and 'View Abstract'.

Step	Action
1.	Click on the Save Request button to save your request.
2.	Click the OK button when asked “Do you want to Save this Request.” Note – The disclaimer window appears with the cert number.

The screenshot shows a confirmation message at the top: 'Request has been saved successfully. [Dismiss this message](#)'. Below it is a box containing the following information: 'Member Name : Test,Keystone Connect', 'Expected Decision Date:', 'Decision: -', 'Cert Number: 150600033', and 'Authorization Type: OP'. Below this box is a blue header 'Disclaimer' and a paragraph of text: 'The case reference number you will receive is for identification purposes only. Authorization is based on medical necessity, is subject to member eligibility and applicable Plan benefit limitations. This is not a guarantee of payment. You must call back and confirm member eligibility and benefit availability 24 hours prior to the scheduled service.'

7 ADD CLINICAL TO AN EXISTING OP REQUEST

How to Add Clinical Information to an Existing OP Nonclinical Request

You **must complete** the following steps:

- Edit Episode Details section (Do you have clinical Yes)
- Add assessment
- Submit request.

Search for an Existing Request

Note: To search by Member ID you will need to add "01" at the end of the Member ID (ex. Member ID 99999 enter 99999-01)
Tip: Search by Member ID instead of Name to make it easier to start a New Request.

Search Request Form Fields:

- Member Last Name:
- Member DOB:
- Member First Name:
- Member ID:
- Government ID:
- Request Added To:
- Request Status:
- Cert Number:
- Provider Name:
- Request Added From:
- Episode Type:
- Episode #:
- View Requests:
- Business Entity:

Request Search Results Table:

Last Trans. Date	Episode ID	Member Name	Episode Type	Request Submit Date	Cert Number	Diagnosis	Submitted By	Status	Decision	Reason for Decision	Actions
	40801	Test, Keystone Connect	OP	01/21/2015	150100616	496 (Chronic airway obstruction, not elsewhere classified)	Deb Marino	Pending for submission			

Step	Action								
1.	Click Search Request on the menu bar from the dashboard.								
2.	Enter the “certification number” in the Cert Number field. Note – You can also search using the member ID or name/DOB.								
3.	Select “ Cases Treated By Me ” from the View Requests drop down box. <table border="1" style="width: 100%;"> <thead> <tr> <th>View Request Options</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>PCP Cases</td> <td>displays requests for members associated with doctor’s panel</td> </tr> <tr> <td>Cases treated by me</td> <td>displays requests associated with the selected business entity</td> </tr> <tr> <td>Cases submitted by me</td> <td>displays requests entered by the person who is logged in</td> </tr> </tbody> </table>	View Request Options	Description	PCP Cases	displays requests for members associated with doctor’s panel	Cases treated by me	displays requests associated with the selected business entity	Cases submitted by me	displays requests entered by the person who is logged in
View Request Options	Description								
PCP Cases	displays requests for members associated with doctor’s panel								
Cases treated by me	displays requests associated with the selected business entity								
Cases submitted by me	displays requests entered by the person who is logged in								
4.	Select your Business Entity from the drop down box.								
5.	Click the Search button.								
6.	Locate the case where you wish to add clinical information.								
7.	Click on the hyperlink in the Episode Type column to access the request								

 If the search results do not reveal the case you are looking for, you can start a new request by clicking on the **Add New Request** button.

Adding Clinical Information to Existing OP Nonclinical Request – Episode Details

You must edit the request to reflect that you want to enter clinical information.

The screenshot shows a web interface for editing a request. At the top, there are buttons for 'Submit Request' and 'Delete Request', and the 'Episode ID: 40854' is displayed. Below this, there are two main sections: 'Demographics' and 'Episode Details'. The 'Demographics' section includes fields for Member Name (Test, Keystone Connect), Member ID (T020002), DOB (09/22/1989), Gender, Product Type (Medicaid/Medicaid Program of MI), Effective Date (09/01/2014), Termination Date, and Group (Keystone Connect). The 'Episode Details' section includes Episode Type (Inpatient), Episode Class (Admission), Reason For Request (Court Mandated), Referral Source (Emergency), Urgency (Standard), Alternative Contact Phone/Fax, Time Request (24 Hours), and Do you have Clinical Info? (Yes). The 'Edit' button is highlighted with a red box.

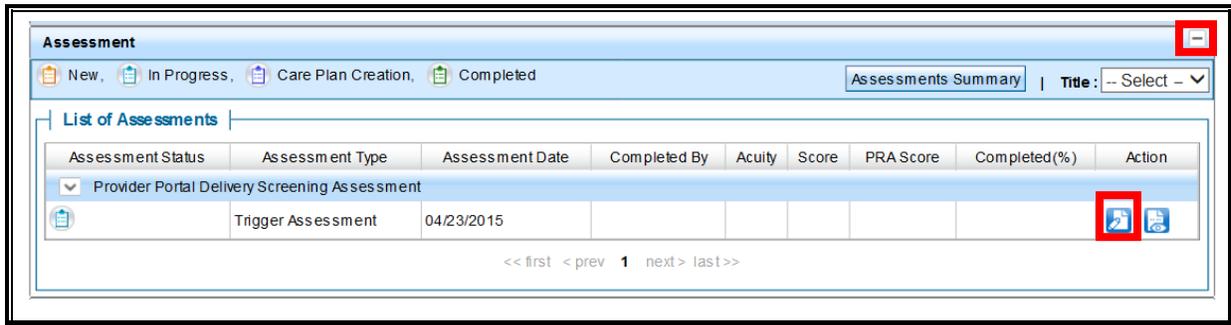
Step	Action
1.	Click the Edit hyperlink in the Episode Details section. Result – the Edit Request window will appear.

The screenshot shows the 'Edit Request' window. It contains the 'Episode Details' section with the following fields: Episode Type (Inpatient), Referral Source (Emergency), Episode Class (Admission), Time Request (24 Hours), Urgency (Standard), Reason for Request (Court Mandated), and Alternate Contact Phone/Fax. The 'Do you Have Clinical Info?' field has two radio buttons: 'Yes' (selected) and 'No'. The 'Yes' radio button is highlighted with a red box. At the bottom, there are 'Save' and 'Cancel' buttons.

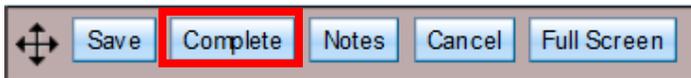
Step	Action
2.	Select the Yes radio button to the question “ Do you have clinical info ” Note - The system will offer an assessment if available for the request that may trigger the auto approval functionality.
3.	Click the Save button
4.	Click the “ Show ” icon  to expand the Assessment section.

Adding Clinical Information to an Existing OP Nonclinical Request – Assessment

If there is an assessment available, it will appear in the list of assessments when you expand the section. You must click the “Show” icon  in the right hand corner to expand this section.



The buttons at the bottom of the screen are to submit your request. Don't submit the request until you have marked the assessment as complete.

Step	Action
1.	Click on the edit assessment icon  to open and complete the assessment
2.	Answer the questions. Note - Questions in red are mandatory.
3.	Click the Complete button to trigger the auto approval rules.  Note - the Save button will not trigger the auto approval rules.

Adding Clinical Information to Existing OP Nonclinical Request – Submit Request

List of Assessments

Assessment Status	Assessment Type	Assessment Date	Completed By	Acuity	Score	PRA Score	Completed(%)	Action
Provider Portal Delivery Screening Assessment								
	Trigger Assessment	04/23/2015		1	7.0		36.84	
	Trigger Assessment							

<< first < prev 1 next > last >>

Episode Notes +

Documents +

Disclaimer

The case reference number you will receive is for identification purposes only. Authorization is based on medical necessity, is subject to member eligibility and applicable Plan benefit limitations. This is not a guarantee of payment. You must call back and confirm member eligibility and benefit availability 24 hours prior to the scheduled service.

Submit Request
Delete Request
View Abstract

Step	Action
1.	Click on the Submit Request button to submit your request.
2.	Click the OK button when asked “Do you want to Submit Request.” Note – The disclaimer window appears with the decision and cert number.

Request has been submitted successfully [Dismiss this message](#)

Member Name : TestKeystone Connect
 Expected Decision Date: 06/07/2015
 Decision: Pending
 Cert Number: 150100616
 Authorization Type: OP

Disclaimer

The case reference number you will receive is for identification purposes only. Authorization is based on medical necessity, is subject to member eligibility and applicable Plan benefit limitations. This is not a guarantee of payment. You must call back and confirm member eligibility and benefit availability 24 hours prior to the scheduled service.

8 ADDITIONAL PROCESSES

Search for a Determination

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

Search Request

Member Last Name: Member First Name:

Member DOB: Member ID: 1020002

Government ID:

Request Added From: Request Added To:

Episode Type: Request Status:

Episode #: Cert Number: 150100616

View Requests: Cases Treated By Me Provider Name:

Business Entity: ALL

Search Reset

Last Trans. Date	Episode ID	Member Name	Episode Type	Request Submit Date	Cert Number	Diagnosis	Submitted By	Status	Decision	Reason for Decision	Actions
	40801	Test, Keystone Connect	OP	01/21/2015	150100616	496 (Chronic airway obstruction, not elsewhere classified)	Deb Marino	InProcess	Pending	Decision pending due to auto update	

Step	Action								
1.	Click Search Request on the menu bar from the dashboard.								
2.	Enter the “certification number” in the Cert Number field. Note – You can also search using the member ID or name/DOB.								
3.	Select “ Cases Treated By Me ” from the View Requests drop down box. <table border="1"> <thead> <tr> <th>View Request Options</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>PCP Cases</td> <td>displays requests for members associated with doctor’s panel</td> </tr> <tr> <td>Cases treated by me</td> <td>displays requests associated with the selected business entity</td> </tr> <tr> <td>Cases submitted by me</td> <td>displays requests entered by the person who is logged in</td> </tr> </tbody> </table>	View Request Options	Description	PCP Cases	displays requests for members associated with doctor’s panel	Cases treated by me	displays requests associated with the selected business entity	Cases submitted by me	displays requests entered by the person who is logged in
View Request Options	Description								
PCP Cases	displays requests for members associated with doctor’s panel								
Cases treated by me	displays requests associated with the selected business entity								
Cases submitted by me	displays requests entered by the person who is logged in								
4.	Select your Business Entity from the drop down box.								
5.	Click the Search button.								
6.	The determination will be in the Decision column (Approve, Pending or Denied).								

Episode ID Hyperlink	Provides a summary of the case.
Episode Type Hyperlink	Provides additional details about the case.

 If the search results do not reveal the case you are looking for, you can start a new request by clicking on the **Add New Request** button.

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.

Note: To search by Member ID you will need to add ".01" at the end of the Member ID (ex. Member ID 99999 enter 99999-01)
Tip: Search by Member ID instead of Name to make it easier to start a New Request.

Search Request

Member Last Name: Member First Name:

Member DOB: Member ID:

Request Added From: Government ID:

Episode Type: Request Added To:

Episode #: Request Status:

View Requests: Cert Number:

Business Entity: Provider Name:

Search **Reset**

Last Trans. Date	Episode ID	Member Name	Episode Type	Request Submit Date	Cert Number	Diagnosis	Submitted By	Status	Decision	Reason for Decision	Actions
	40801	Test, Keystone Connect	OP	01/21/2015	150100616	496 (Chronic airway obstruction, not elsewhere classified)	Deb Marino	InProcess	Pending	Decision pended due to auto update	

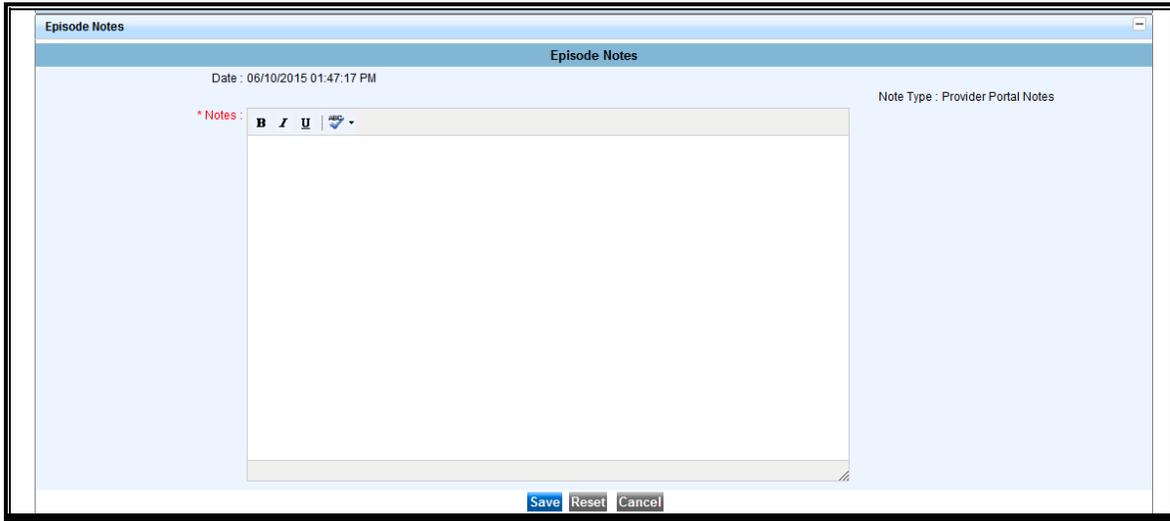
Step	Action								
1.	Click Search Request on the menu bar from the dashboard.								
2.	Enter the “certification number” in the Cert Number field. Note – You can also search using the member ID or name/DOB.								
3.	Select “ Cases Treated By Me ” from the View Requests drop down box. <table border="1"> <thead> <tr> <th>View Request Options</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>PCP Cases</td> <td>displays requests for members associated with doctor’s panel</td> </tr> <tr> <td>Cases treated by me</td> <td>displays requests associated with the selected business entity</td> </tr> <tr> <td>Cases submitted by me</td> <td>displays requests entered by the person who is logged in</td> </tr> </tbody> </table>	View Request Options	Description	PCP Cases	displays requests for members associated with doctor’s panel	Cases treated by me	displays requests associated with the selected business entity	Cases submitted by me	displays requests entered by the person who is logged in
View Request Options	Description								
PCP Cases	displays requests for members associated with doctor’s panel								
Cases treated by me	displays requests associated with the selected business entity								
Cases submitted by me	displays requests entered by the person who is logged in								
4.	Select your Business Entity from the drop down box.								
5.	Click the Search button.								
6.	Click the Extend Request icon in the Actions column.								

Extending an Existing Request (con't)

Step	Action						
8.	Click on Step 2: UM Services in the left navigation window.						
9.	Click on the extend icon  in the actions column.						
10.	Enter the “number of days” you are requesting in the LOS Requested # field for IP and in the Units/Visits field for OP.						
11.	Click on Step 3: Add Assessment in the left navigation window. <table border="1" data-bbox="396 982 1466 1182"> <thead> <tr> <th>IF</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>There is an extension or second initial assessment</td> <td>Go to step 12.</td> </tr> <tr> <td>There is NO additional assessments</td> <td>Go to step 15.</td> </tr> </tbody> </table>	IF	THEN	There is an extension or second initial assessment	Go to step 12.	There is NO additional assessments	Go to step 15.
IF	THEN						
There is an extension or second initial assessment	Go to step 12.						
There is NO additional assessments	Go to step 15.						
12.	Click on the modify icon  to open the assessment.						
13.	Answer the questions. Note – Questions in red are mandatory.						
14.	Click the Complete button to trigger the auto approval rules. Note - the Save button will not trigger the auto approval rules.						
15.	Click on Step 4: Add Notes in the left navigation window.						
16.	Click the Add Notes button						
17.	Type the extension notes in the Notes section						
18.	Click the Save button						
19.	Click on Step 6: Submit Extension in the left navigation window.						
20.	Click on the Submit Request button to submit your extension request.						

Adding Notes - Initial Request

The **Notes** field is compressed so you must click the “Show” icon  in the right hand corner to expand this section.



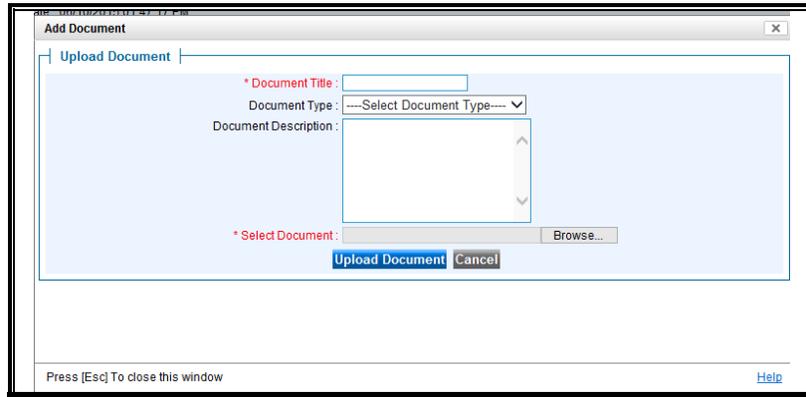
Step	Action
1.	Click the “Show” icon  in the right hand corner to expand this section
2.	Click the Add Notes button
3.	Enter the appropriate notes in the notes section. Be sure to include your name and contact information in the event the plan needs to contact you. Note- Spell check is available by clicking the icon  on the menu bar.
4.	Click the Save button.



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

Attaching a Document - Initial Request

It is recommended that you save the document to a location that you can easily find. For example, save the document to your desktop. The **Documents** field is compressed so you must click the “Show” icon  in the right hand corner to expand this section.



Step	Action
1.	Click the “Show” icon  in the right hand corner to expand this section
2.	Click the Add Documents button Result – The Add Document window appears
3.	Enter the “title of the document” in the Document Title field
4.	Select the most appropriate Document Type
5.	Optional: Add a Document Description
6.	Click the Browse button to search for your document you wish to upload Note – If you saved it to your desktop, navigate to your desktop to upload the document.
7.	Select the document Note – the title of the document will appear in the Select Document field.
8.	Click the Upload Document button. Note - You should see the document in the documents section.

Diagnosis Favorites List – How to Create a Favorites List

The “Favorites List” will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider’s account. The steps for creating a “Favorites List” are below.

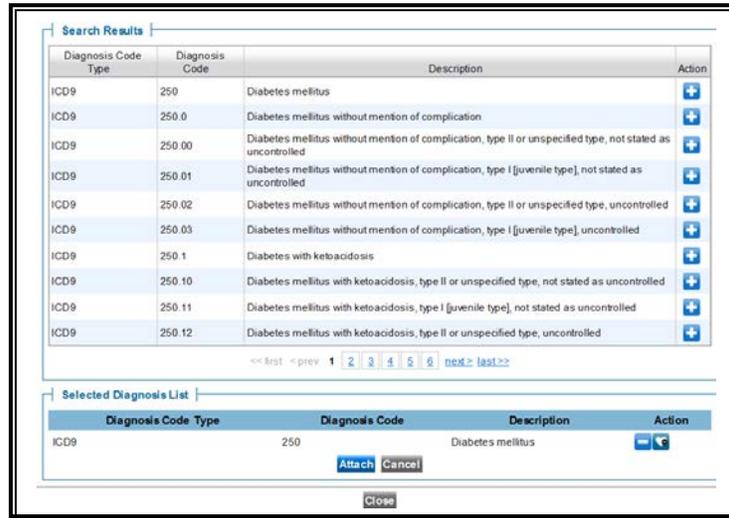
Primary	Diagnosis Code Type	Diagnosis	Actions
★	ICD9	250--Diabetes mellitus,	[-]

Step	Action
1.	Click the diagnosis search icon  to initiate the search. Result – The “Diagnosis Code Search Form” window will appear.

Diagnosis Code Type	Diagnosis Code	Description	Action
ICD9	250	Diabetes mellitus	[+]
ICD9	250.0	Diabetes mellitus without mention of complication	[+]

Step	Action
2.	Select the appropriate “Diagnosis Code Type” from the drop down
3.	Type the code or the description in the appropriate field Result – The “Search Results” will appear.

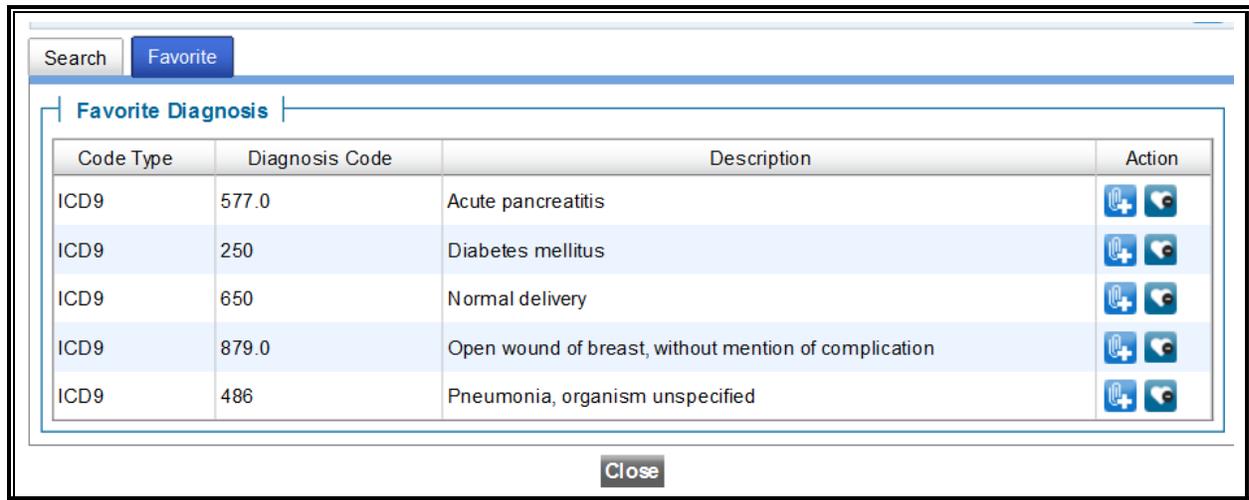
Diagnosis Favorites List – How to Create a Favorites List (con't)



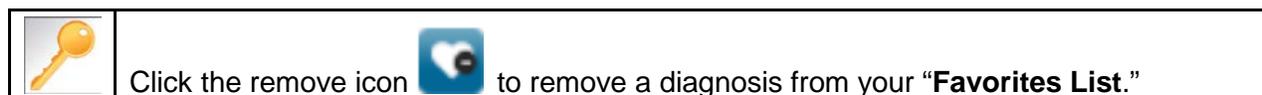
Step	Action						
4.	<p>Click the add icon next to the diagnosis of your choice</p> <p>Result – the selected diagnosis will appear in the “Selected Diagnosis List” at the bottom of the screen.</p>						
IF	THEN						
you wish to add the diagnosis to the request	go to step #5						
you wish to add the diagnosis to your “ Favorites List ”	<p>Click on the heart icon </p> <table border="1"> <thead> <tr> <th>IF</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>you wish to select additional diagnoses to your “Favorite List”</td> <td>repeat steps 2 thru 4</td> </tr> <tr> <td>you wish to add the diagnosis to the request</td> <td>go to step #5</td> </tr> </tbody> </table>	IF	THEN	you wish to select additional diagnoses to your “ Favorite List ”	repeat steps 2 thru 4	you wish to add the diagnosis to the request	go to step #5
	IF	THEN					
	you wish to select additional diagnoses to your “ Favorite List ”	repeat steps 2 thru 4					
you wish to add the diagnosis to the request	go to step #5						
5.	Click on the “ Attach ” button to add the diagnosis to the request.						

Diagnosis Favorites List – Utilizing a Favorites List

Once your “**Favorites List**” is set up, you do not need to search for diagnosis in order to add them to the request. Follow the steps below to add diagnosis from your “**Favorites List**.”



Step	Action
1.	Click on the heart icon in the diagnosis section of the new request Result – The “Favorite Diagnosis” window opens.
2.	Click on the add icon to add the diagnosis to the request
3.	After you have added the diagnosis, click on the “Next” button to display the next mandatory section of “Adding Providers.”

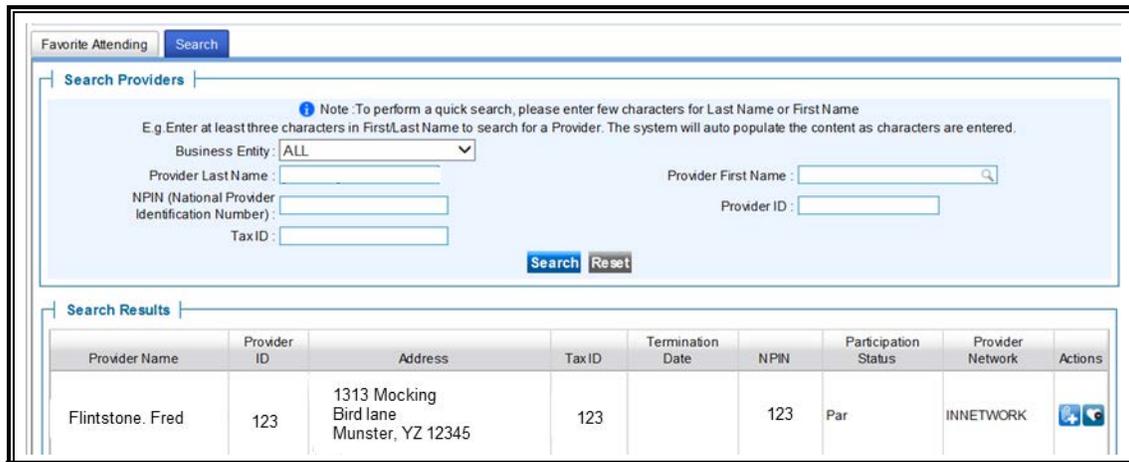


Providers Favorites List – How to Create a Favorites List

The “Favorites List” will allow you to create and manage a list of frequently used providers. The list is unique to the provider’s account. The steps for creating a “Favorites List” are below.



Step	Action
1.	Click the provider search icon  to initiate the search. Result – The “Search Providers” window appears.



Step	Action
2.	Search for the provider.
3.	Click the “Favorites” icon  in the row of the provider you wish to add to your “Favorites List.” Result – The provider is now added to your “Favorite List.”

Providers Favorites List – Utilizing a Favorites List

Once your “**Favorites List**” is set up, you do not need to search for your commonly used providers in order to add them to the request. Follow the steps below to add a provider from your “**Favorites List**.”

Step	Action
1.	Click on the heart icon  in the “Providers” section of the new request Result – The “Favorite Providers” window opens.
2.	Click on the add icon  to add the provider to the request

	Click the remove icon  to remove the provider from your “ Favorites List .”
---	---

Add Additional Diagnoses - Extension Request

(Note: This is a Test Site. Data entered here will not be migrated to Production. -)

Jiva™ Provider

New Request Search Request My Inbox

Step 1: Edit Request
Step 2: Add Providers
Step 3: Add Diagnosis
Step 4: UM Services
Step 5: Add Assessment
Step 6: Add Notes
Step 7: Add Documents
Step 8: Submit Request

Episode ID: 27323 [Delete Request](#)

Member Name : Alamo de, Pie
Member ID : 78945612-01
DOB : 05/05/1950
Address : Cherry Road, Coolwhip, PA, USA, -

Gender :
Age: 63

Preferred Phone # :
Product Type: Medicaid(Medicaid Program of MI)
Elig. Start Date: 01/01/2004
Elig. End Date: 12/31/9999

Group [Keystone First Health Plan - TCats 21 and Over w/Adult MA](#)
Employer: Keystone First
Client: Keystone First

Episode : IP
Episode Status : New
Primary Diagnosis : 650
Procedure Details :

Diagnosis

Primary DX	Diagnosis	Diagnosis Type	Date Added
Yes	650 (0) - Normal delivery	ICD9	07/29/2013

[Add New Diagnosis](#)

Step	Action
1.	Click on the step titled Add Diagnosis in the left navigation window.
2.	Click on the Add New Diagnosis button.
3.	Enter the appropriate Start Date .
4.	Enter the appropriate Diagnosis Code . Note - you can search for a diagnosis by clicking the search icon  .
5.	Click the Add New Diagnosis icon  .
6.	Click the Add button to save the additional diagnosis.