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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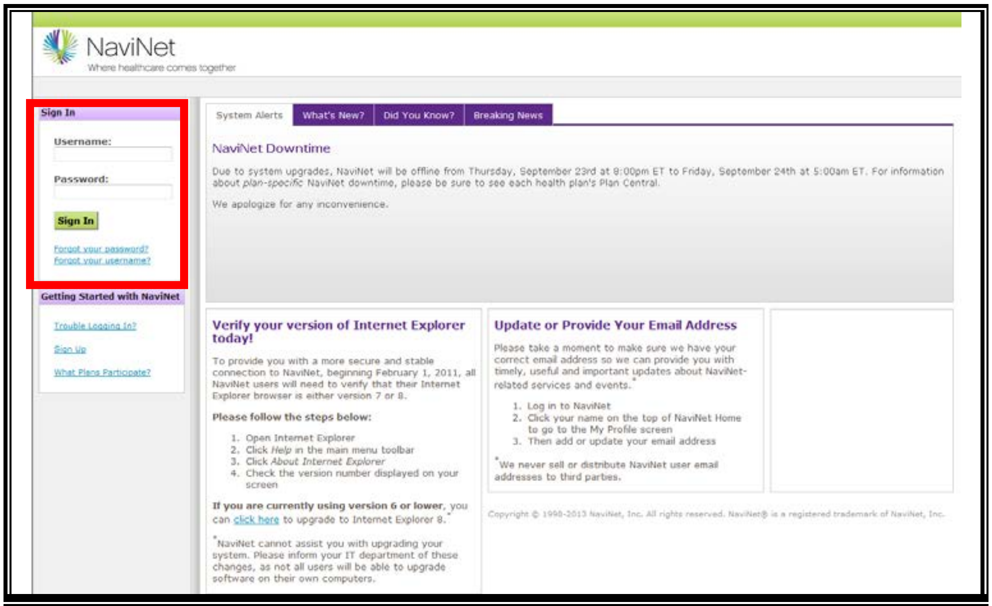
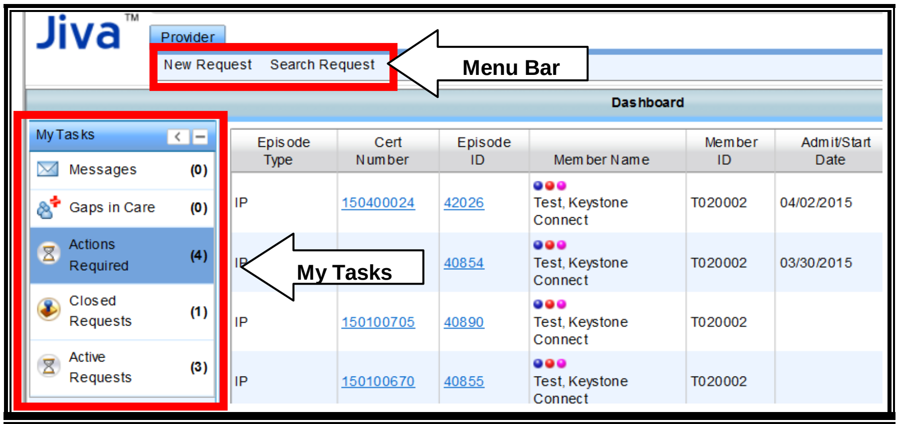
1 LOGGING INTO THE PROVIDER PORTAL



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.

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:

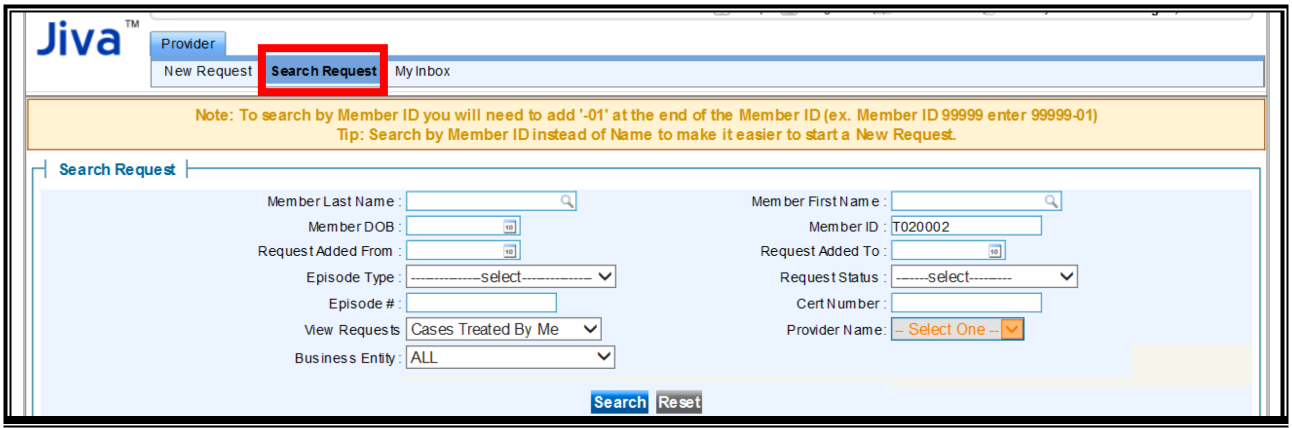
- **Episode Details**
- **Diagnosis- primary a must, secondary is optional**
- **Treating Provider**
- **Attending Physician**
- **Add stay request**
- **Assessment (if triggered)**

	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.

	Duplicate Case Check and Alert
	Jiva will compare dates of service, treating provider and procedure request to other cases for the member. You will receive a warning message if a possible duplicate exists. Jiva will not auto approve any case that is a possible duplicate. The request will be evaluated by the Utilization Management team.

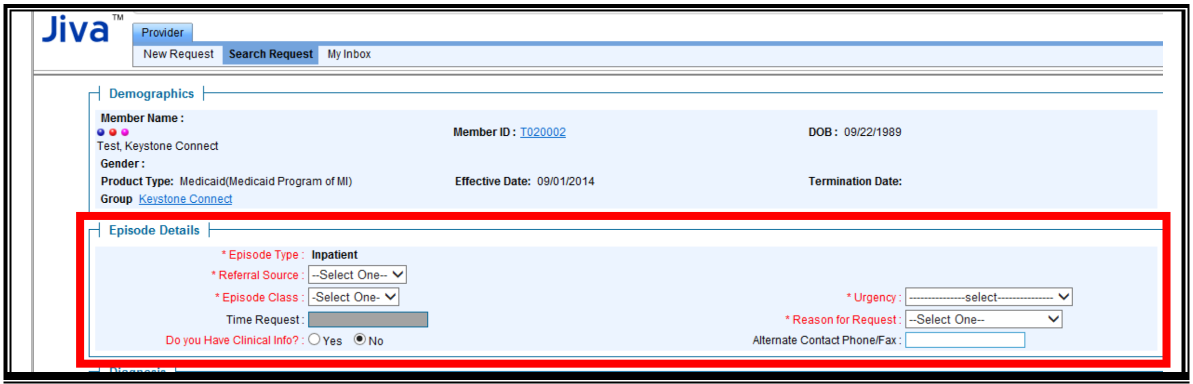


Step	Action
1.	Click on **Search Request** on the menu bar.
2.	Enter the “member ID” in the **member ID** field or the member’s name and DOB. **<u>IMPORTANT</u>** – Please enter “-01” at the end of the member ID.
3.	Select “**Cases Treated By Me”** in the **View Requests** drop down.
4.	Verify that “**All”** 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 **<u>Note</u>** – Adding a request from this screen auto populates the member’s data.

	When searching by member’s name you must fill out all three of the following fields: - Member Last Name - Member First Name - Member DOB

Adding a New IP Clinical Request – Adding Episode Details

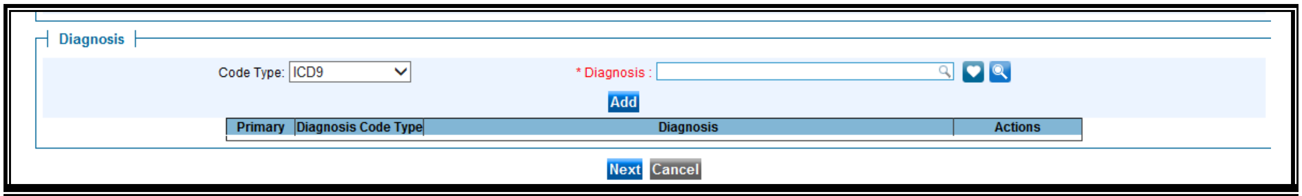
The member Demographics section will auto populate. Follow the steps below to complete the **Episode Details** section.



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."



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Select the appropriate code in the Code Type drop down</td></tr>
<tr><td>2.</td><td>Type the diagnosis or code in the Diagnosis field or click the search icon to initiate a search for the diagnosis</td></tr>
<tr><td>3.</td><td>Click the Add button to add the diagnosis to the request</td></tr>
<tr><td>4.</td><td>
<table>
<tr><th>IF</th><th>THEN</th></tr>
<tr><td>you want to add additional diagnoses</td><td>Repeat steps 2 and 3.

<u>Note</u>:
- 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 <u>do not</u> want to add additional diagnoses</td><td>Go to step 5.</td></tr>
</table>
</td></tr>
<tr><td>5.</td><td>Click the Next button.

Result - The Providers section will appear.</td></tr>
</table>

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.

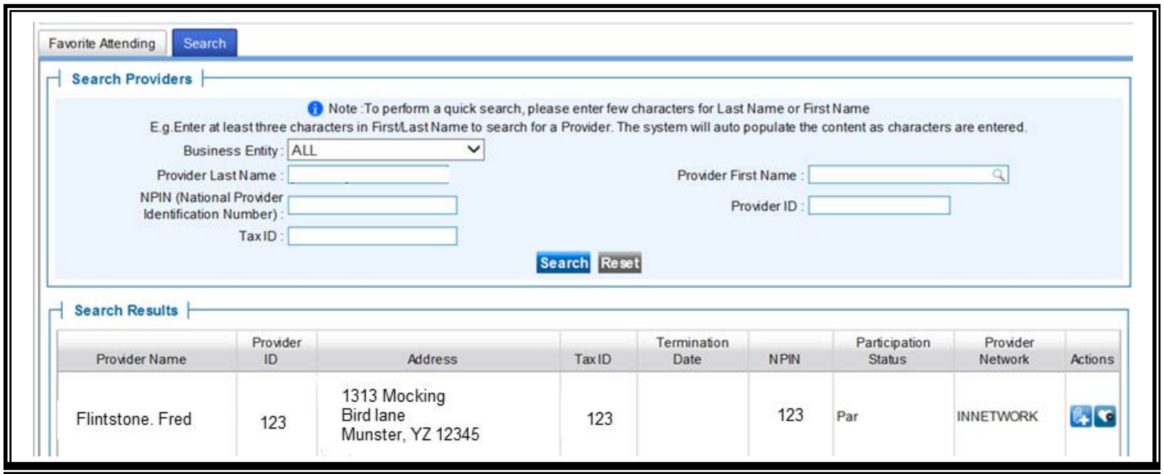
- When searching for a **Treating** provider, the search results will only contain facilities.
- When searching for an **Attending** provider, the search results will only contain physicians.

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

<table>
<tr><td></td><td>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.”</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>
<table>
<tr><th>IF</th><th>THEN</th></tr>
<tr><td>the facility you wish to attach to the request appears in the Treating drop down</td><td>- Select the appropriate facility
- Click the attach button</td></tr>
<tr><td>the facility you wish to attach to the request <u>does not</u> appear in the Treating drop down</td><td>Go to step 2.</td></tr>
</table>
</td></tr>
<tr><td>2.</td><td>Click on the search icon  to initiate the search.
Result – The Search Providers window opens.</td></tr>
</table>

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



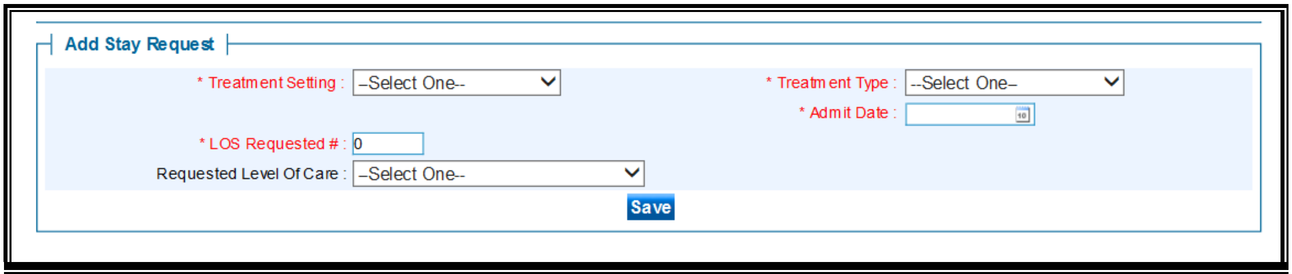
Step	Action
3.	Type your search criteria in the appropriate fields
4.	Click the **Search** button
5.	Click the attach icon to add the provider to the request. **Result** – the facility will be added to the request. **Notes**: – Click the **Deactivate** icon to deactive a facility – Click the **Activate** 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

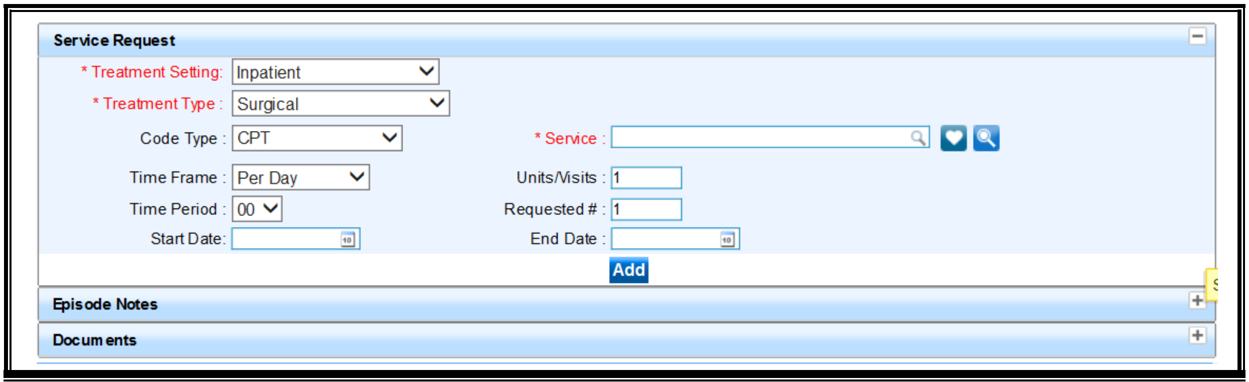
You can add a Stay Request (length of stay/days in hospital) without adding a Service Request. The Service Request is used to request a surgical procedure. The following steps outline how to add the Stay Request.



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.

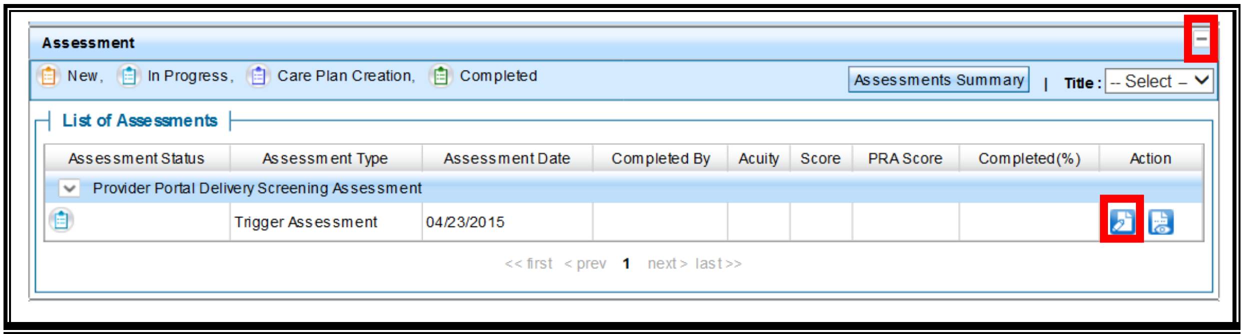


Step	Action
1.	To save time and keystrokes, the system will automatically default the "**Treatment Setting**" and the "**Treatment Type**" field since you have already addressed that information in the "Stay Request" section.
2.	Type the service code in the **Service** field or click the search icon 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.

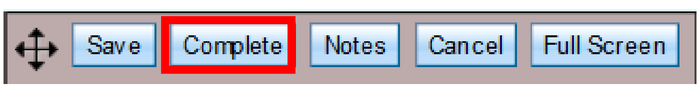
	Click the "Show" icon in the right hand corner of the "**Episode Notes**" and/or "**Documents**" sections to expand and add additional information to the request. Reference Chapter 8 for more information.

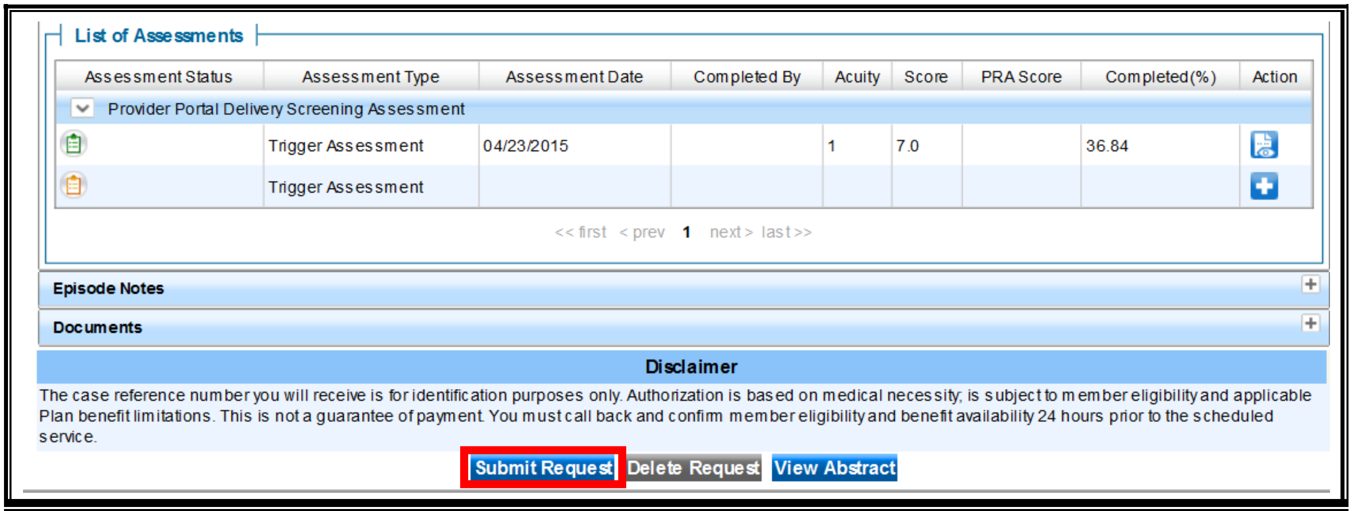
Adding a New IP Clinical Request – Adding Assessments

If there is an assessment available, it will be 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.

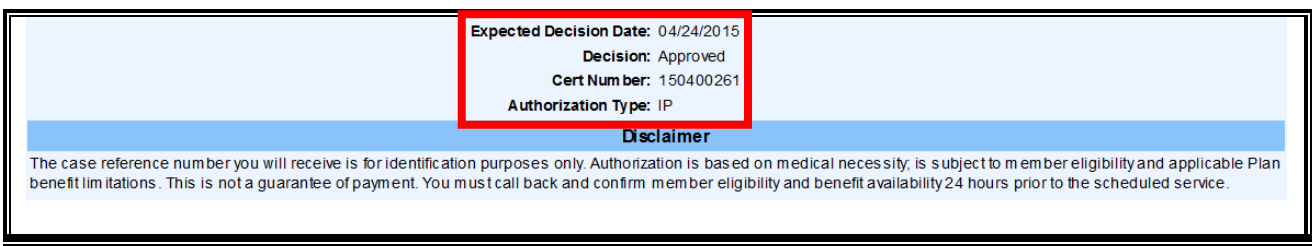


	The buttons at the bottom of the screen are to submit your request. **Do not** submit the request until you have marked the assessment as complete.

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.



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.” **<u>Note</u>** – The disclaimer window appears with the decision and cert number.



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 **<u>non-clinical</u>** 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.

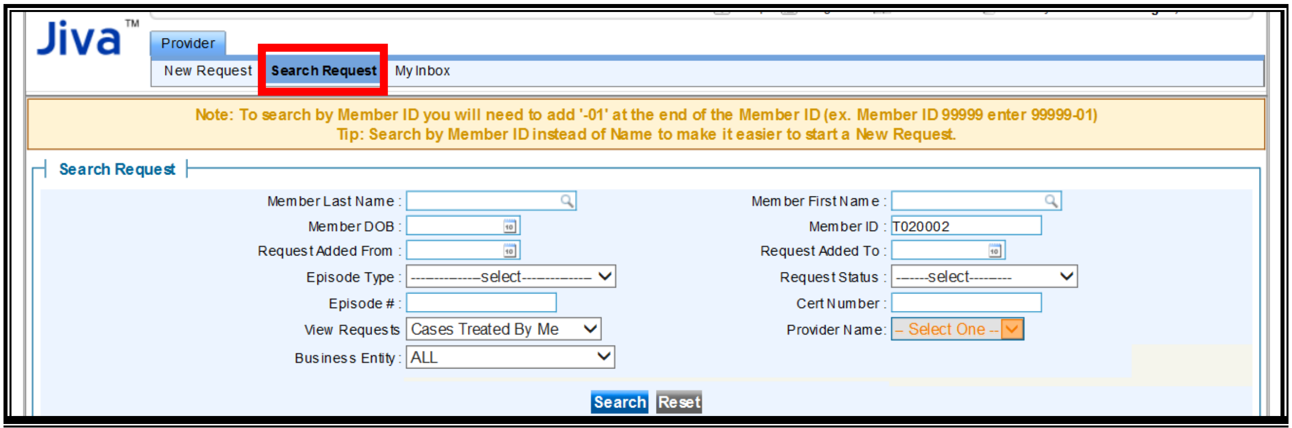
Searching for a Member

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.

Duplicate Case Check and Alert

Jiva will compare dates of service, treating provider and procedure request to other cases for the member. You will receive a warning message if a possible duplicate exists.

Jiva will not auto approve any case that is a possible duplicate. The request will be evaluated by the Utilization Management team.



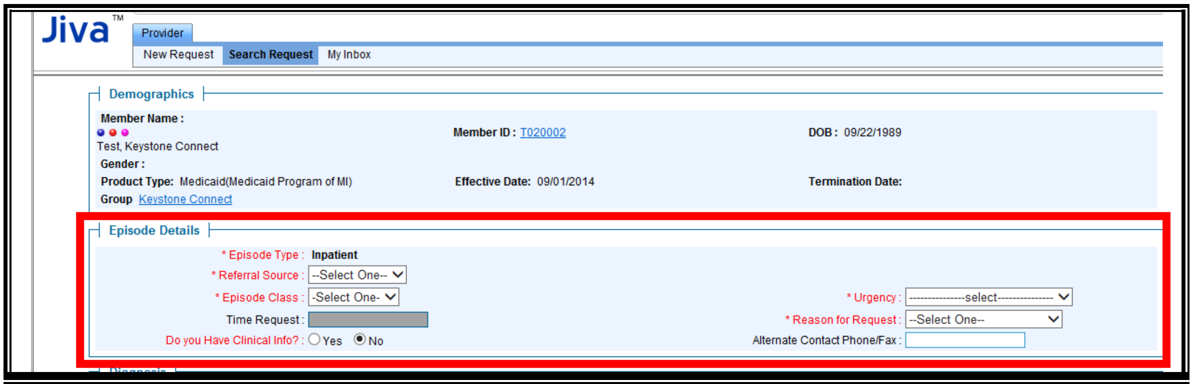
Step	Action
1.	Click on **Search Request** on the menu bar.
2.	Enter the "member ID" in the **member ID** field or the member's name and DOB **<u>IMPORTANT</u>** – Please enter "-01" at the end of the member ID.
3.	Select "**Cases Treated By Me"** in the **View Requests** drop down.
4.	Verify that "**All"** 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 **<u>Note</u>** – Adding a request from this screen auto populates the member's data.

When searching by member's name you must fill out all three of the following fields:

- Member Last Name
- Member First Name
- Member DOB

Adding a new IP Nonclinical Request – Adding Episode Details

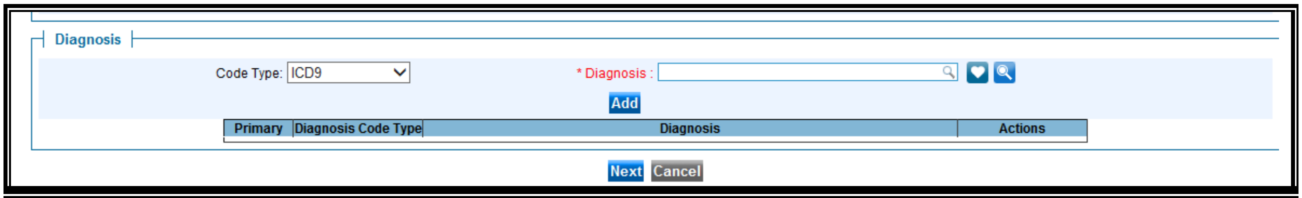
The member Demographics section will auto populate. Follow the steps below to complete the **Episode Details** section.



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.”



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Select the appropriate code in the Code Type drop down</td></tr>
<tr><td>2.</td><td>Type the diagnosis code in the Diagnosis field or click the search icon to initiate a search for the correct diagnosis</td></tr>
<tr><td>3.</td><td>Click the Add button to add the diagnosis to the request</td></tr>
<tr><td>4.</td><td>
<table>
<tr><th>IF</th><th>THEN</th></tr>
<tr><td>you want to add additional diagnoses</td><td>Repeat steps 2 and 3.

<u>Note</u>:
- 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 <u>do not</u> want to add additional diagnoses</td><td>Go to step 5.</td></tr>
</table>
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<tr><td>5.</td><td>Click the Next button.

Result - The Providers section will appear.</td></tr>
</table>

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.

	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."

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>
<table>
<tr><th>IF</th><th>THEN</th></tr>
<tr><td>the facility you wish to attach to the request appears in the Treating drop down</td><td>- Select the appropriate facility
- Click the attach button</td></tr>
<tr><td>the facility you wish to attach to the request <u>does not</u> appear in the Treating drop down</td><td>Go to step 2.</td></tr>
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<tr><td>2.</td><td>Click on the search icon to initiate the search.
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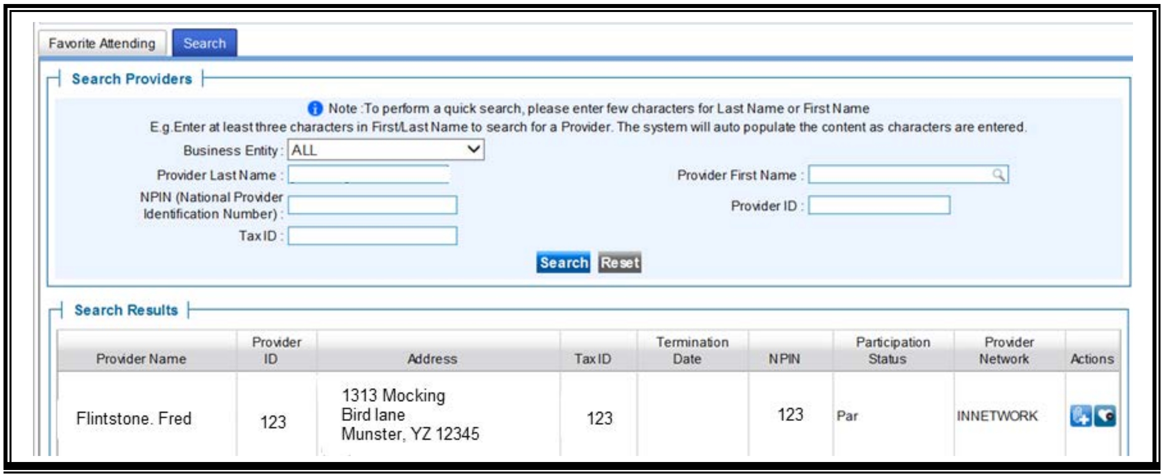


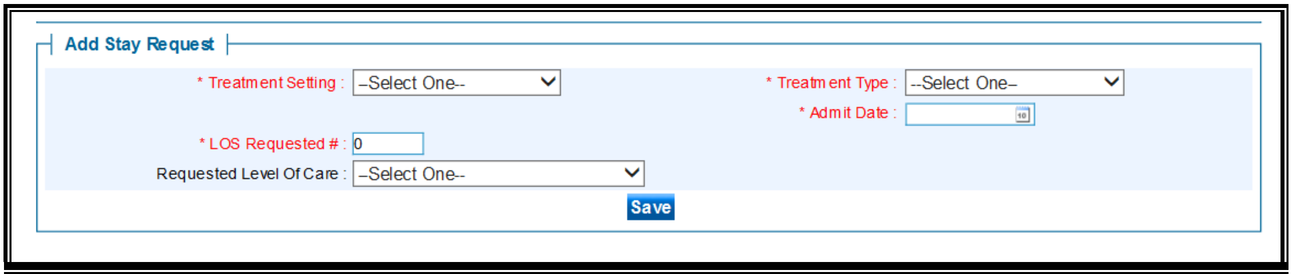
Step	Action
3.	Type your search criteria in the appropriate fields
4.	Click the **Search** button
5.	Click the attach icon to add the provider to the request. **Result** – the facility will be added to the request. **<u>Notes</u>**: – Click the **Deactivate** icon to deactive a facility – Click the **Activate** 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 Nonclinical Request – Adding Stay Request

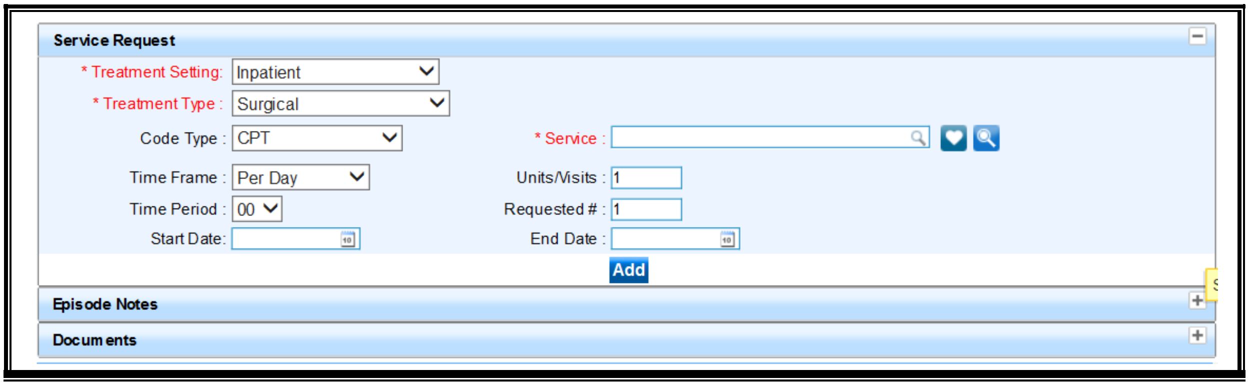
You can add a Stay Request (length of stay/days in hospital) without adding a Service Request. The Service Request is used to request a surgical procedure. The following steps outline how to add the Stay Request.



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.



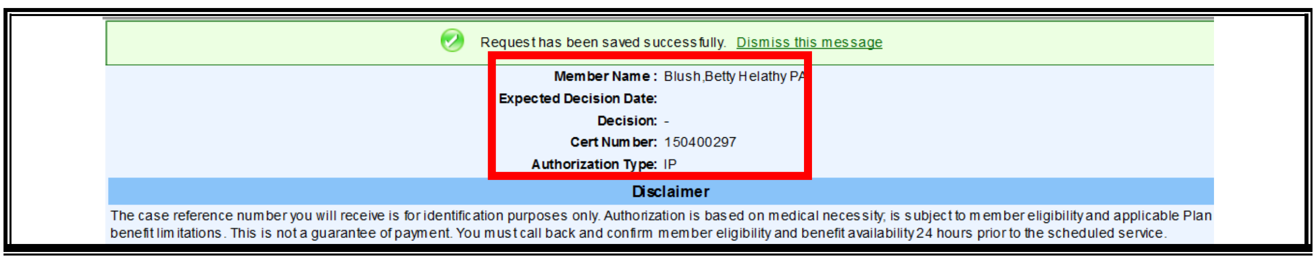
Step	Action
1.	To save time and keystrokes, the system will automatically default the "**Treatment Setting**" and the "**Treatment Type**" field since you have already addressed that information in the "Stay Request" section.
2.	Type the service code in the **Service** field or click the search icon 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.

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.” **<u>Note</u>** – The disclaimer window appears with the cert number.



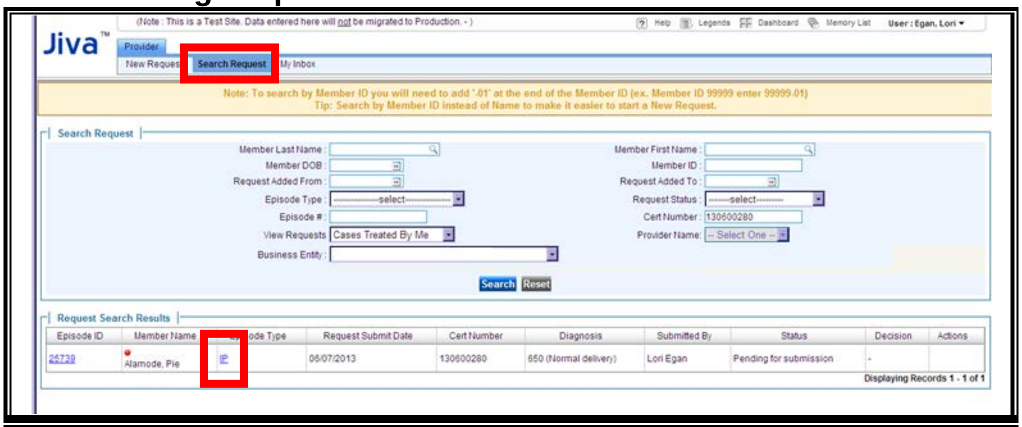
4 ADD CLINICAL TO AN EXISTING IP REQUEST

How to Add Clinical Information to an Existing IP Nonclinical Request

You **must complete** the following steps:

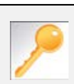
- Edit Episode Details section (Do you have clinical Yes)
- Add assessment
- Submit request.

Search for an Existing Request



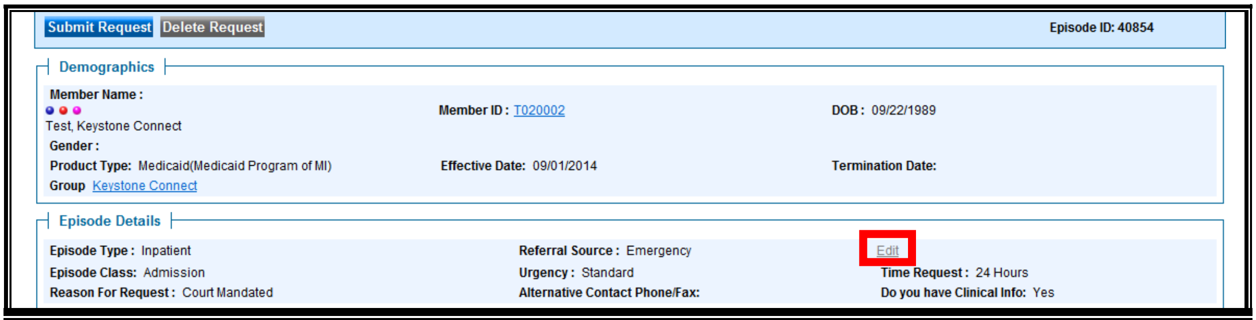
Step	Action
1.	Click **Search Request** on the menu bar from the dashboard.
2.	Enter the "certification number" in the **Cert Number** field. **<u>Note</u>** – You can also search using the member ID or name/DOB.
3.	Select "**Cases Treated By Me**" from the **View Requests** drop down box.
4.	Select 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

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

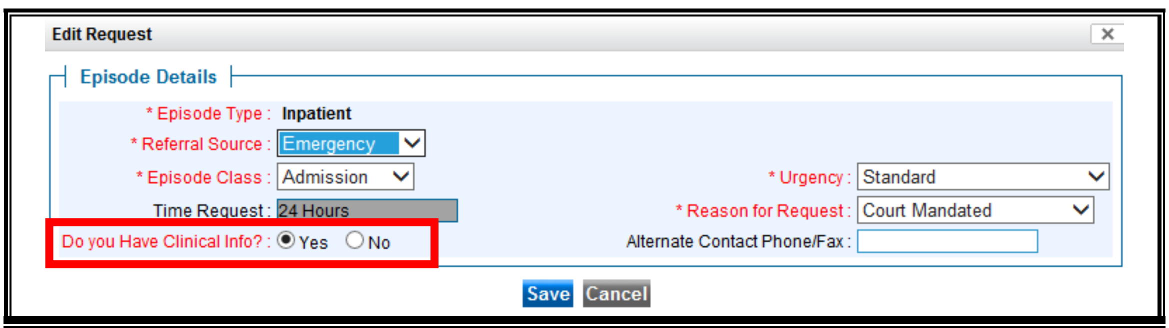


If the search results do not reveal the case you are looking for, you can start a new request by clicking on the **Add New Request** button.

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



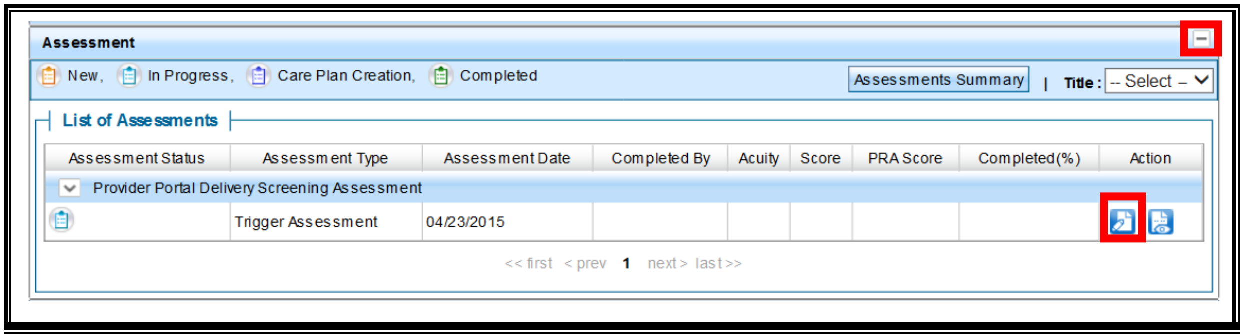
Step	Action
1.	Click the **Edit** hyperlink in the **Episode Details** section. **Result** – the **Edit Request** window will appear.



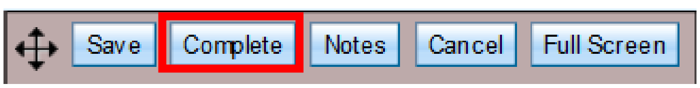
Step	Action
2.	Select the **Yes** radio button to the question "**Do you have clinical info**" **Note** - The system will offer an assessment if available for the request that may trigger the auto approval functionality.
3.	Click the **Save** button
4.	Click the "**Show**" icon  to expand the **Assessment**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

Adding Clinical Information to an Existing IP Nonclinical Request – Assessment

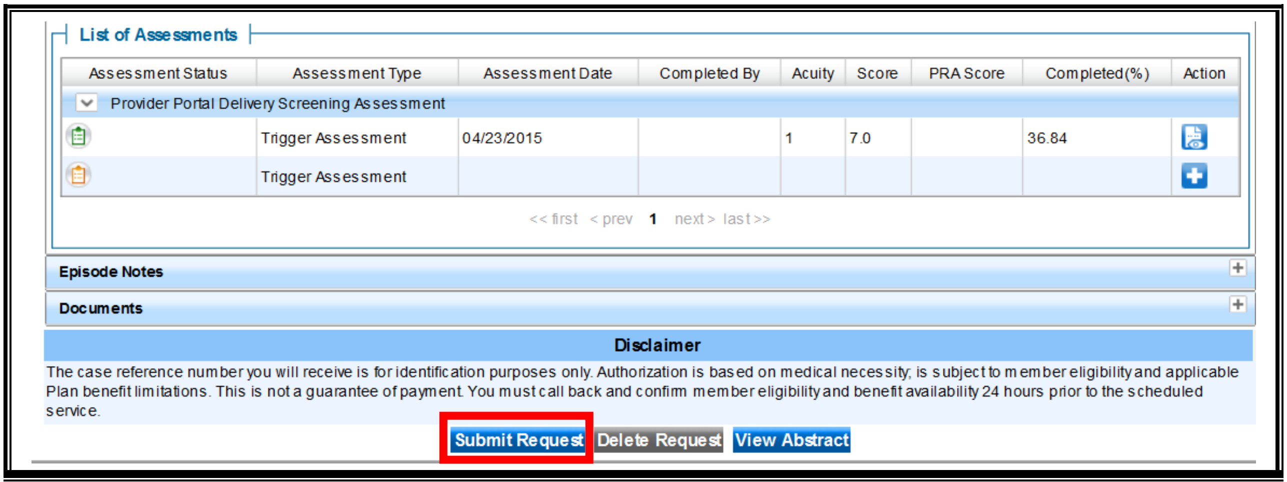
If there is an assessment available, it will be appear in the list of assessments when you expand the section. You must click the “Show” icon in the right hand corner to expand this section.



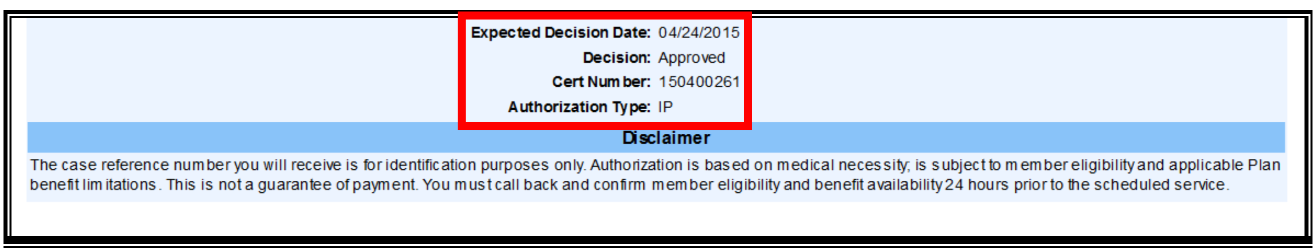
	The buttons at the bottom of the screen are to submit your request. Do not submit the request until you have marked the assessment as complete.

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



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." **<u>Note</u>** – The disclaimer window appears with the decision and cert number.



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:

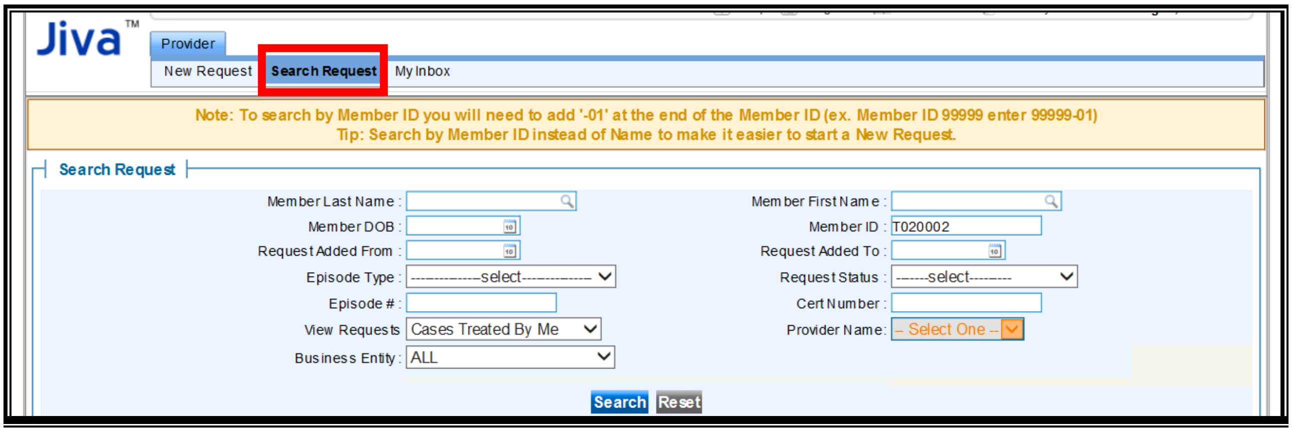
- **Episode Details**
- **Diagnosis- primary a must, secondary is optional**
- **Providers**
- **Add Service request**
- **Assessment (if triggered)**

	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.

	Duplicate Case Check and Alert
	Jiva will compare dates of service, treating provider and procedure request to other cases for the member. You will receive a warning message if a possible duplicate exists. Jiva will not auto approve any case that is a possible duplicate. The request will be evaluated by the Utilization Management team.

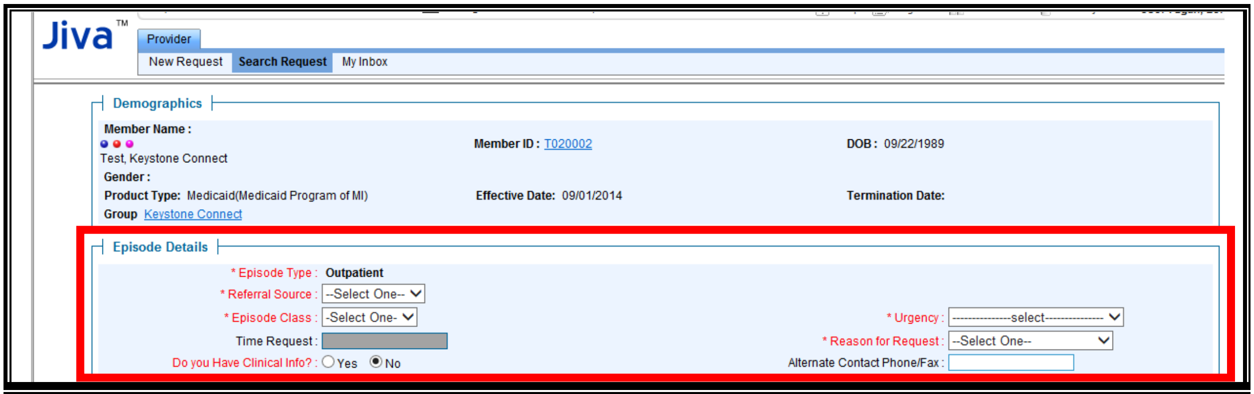


Step	Action
1.	Click on **Search Request** on the menu bar.
2.	Enter the "member ID" in the **member ID** field or the member's name and DOB. **<u>IMPORTANT</u>** – Please enter "-01" at the end of the member ID.
3.	Select "**Cases Treated By Me"** in the **View Requests** drop down.
4.	Verify that "**All"** 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 **<u>Note</u>** – Adding a request from this screen auto populates the member's data.

	When searching by member's name you must fill out all three of the following fields: - Member Last Name - Member First Name - Member DOB

Adding a New OP Clinical Request – Adding Episode Details

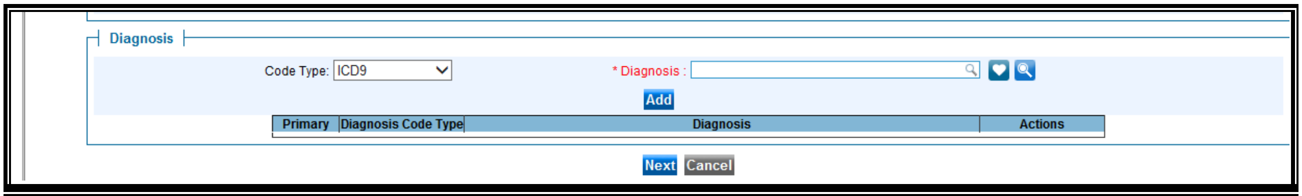
The member Demographics section will auto populate. Follow the steps below to complete the **Episode Details** section.



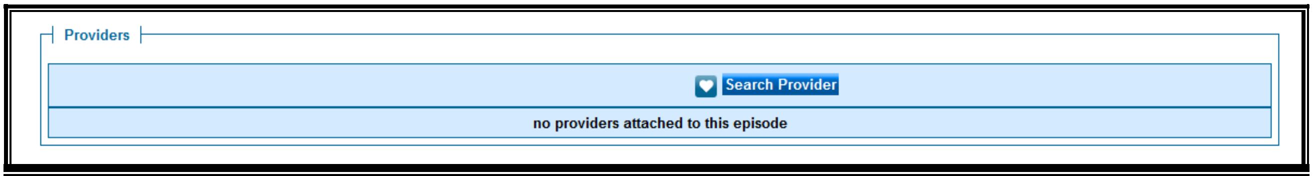
Step	Action
1.	Select the appropriate source from the **Referral Source** drop down menu
2.	Select the appropriate class from the **Episode Class** drop down menu
3.	Select the appropriate urgency from the **Urgency** drop down menu
4.	Select the appropriate reason from the **Reason for Request** drop 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

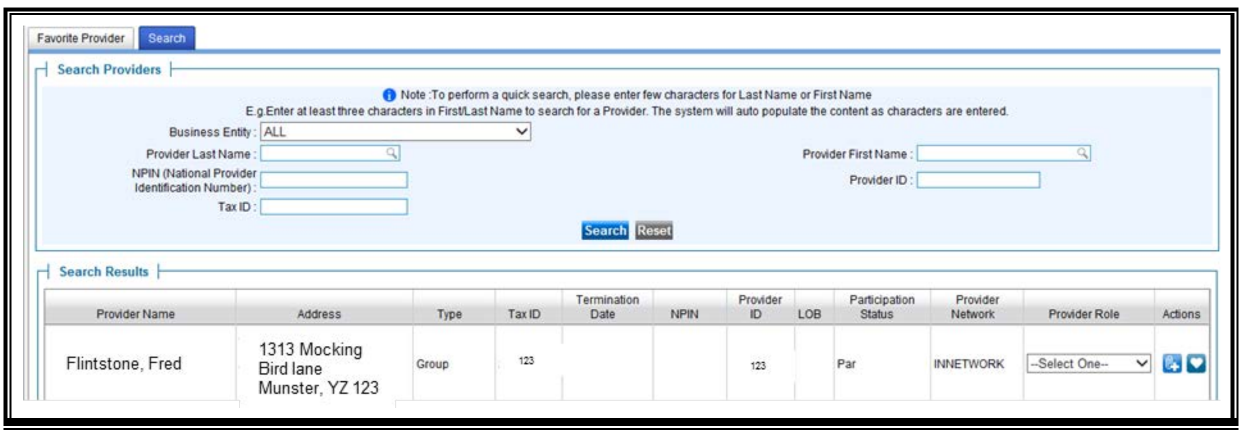
You can add multiple diagnoses from this screen or you can utilize the Favorites icon to save time and keystrokes. The “Favorites List” will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider’s account. Reference chapter 8 “Diagnosis Favorites List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



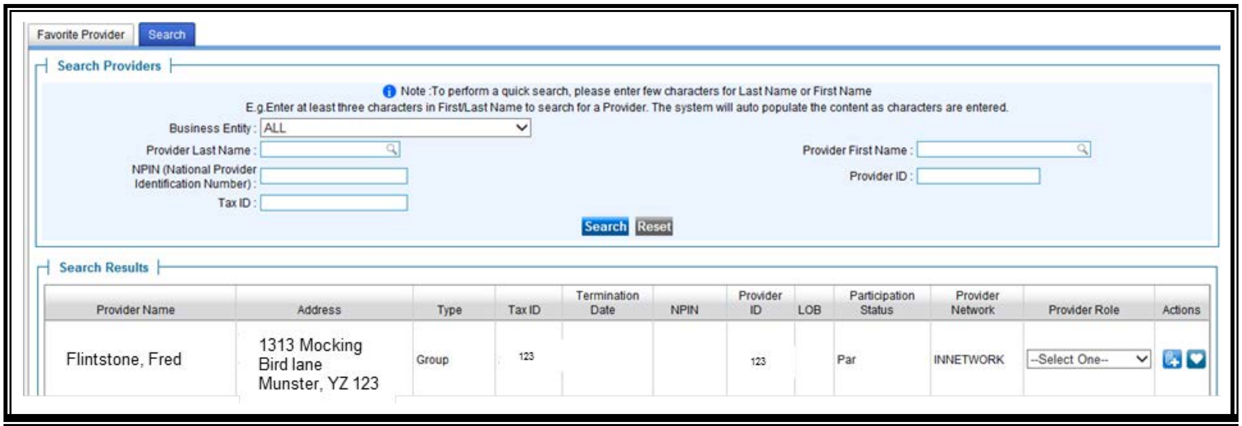
Step	Action
1.	Select the appropriate code in the **Code Type** drop down
2.	Type the diagnosis code in the **Diagnosis** field or click the search icon to initiate a search for the correct diagnosis
3.	Click the **Add** button to add the diagnosis to the request
4.	**IF** you want to add additional diagnoses **THEN** 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. **IF** you **do not** want to add additional diagnoses **THEN** Go to step 5.
5.	Click the **Next** button. **Result** - The **Providers** section will appear.



Step	Action
1.	Click the **Search Provider** button **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."



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



Step	Action
4.	Select the appropriate role from the **Provider Role** drop down **<u>Note</u>** - 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
<u>Example:</u> 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

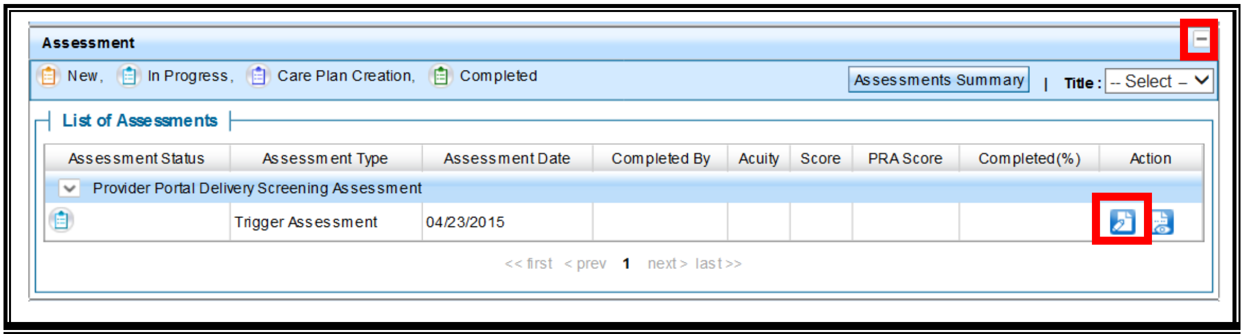
If you attached the correct provider, but have an incorrect provider role follow the steps outlined below to make the correction.

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.

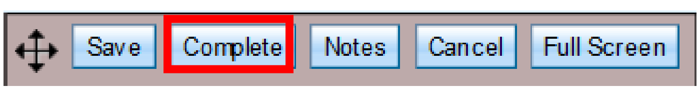
Step	Action
1.	Select the appropriate choice in the **Treatment Setting** drop down
2.	Select the appropriate choice in the **Treatment Type** drop down
3.	Type the service code in the **Service** field or click the search icon  to initiate a search for the correct service
4.	The "**Units/Visits**" field 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

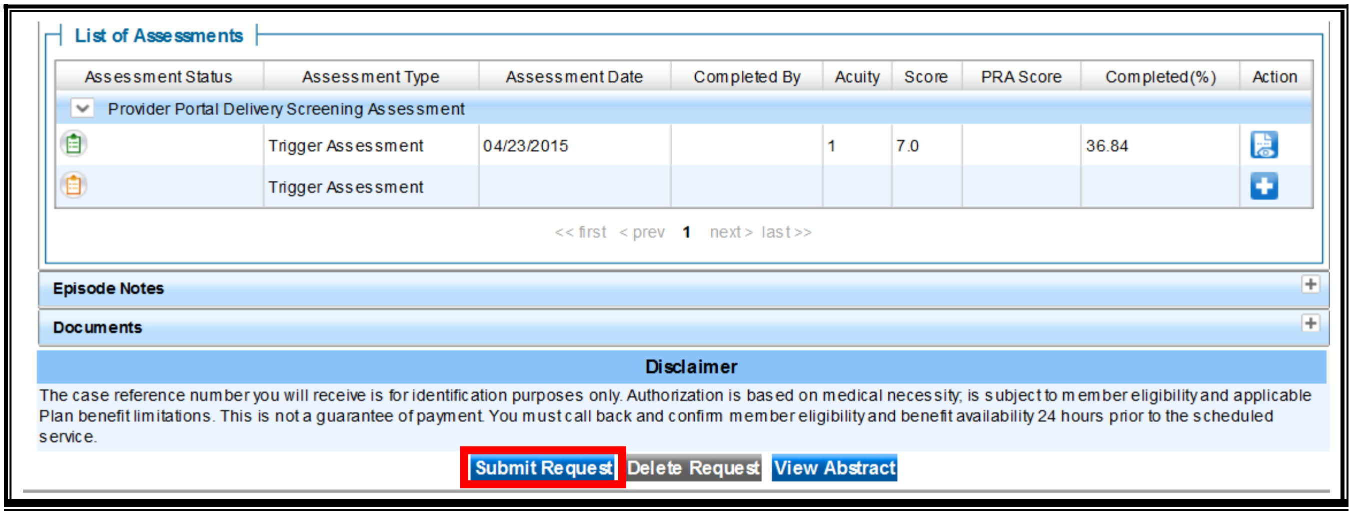
If there is an assessment available, it will be appear in the list of assessments when you expand the section. You must click the "Show" icon in the right hand corner to expand this section.



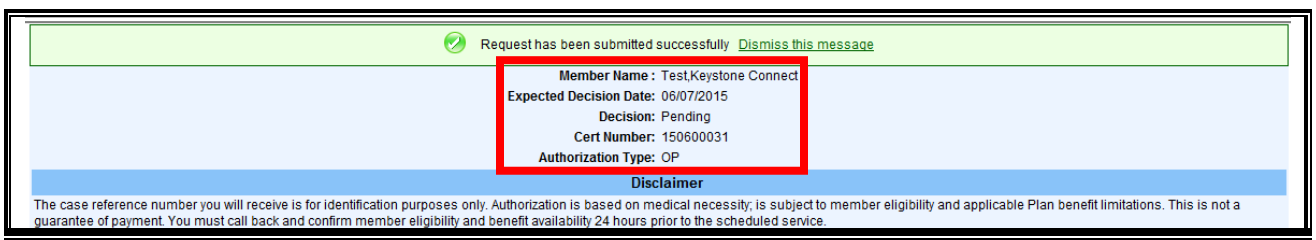
	The buttons at the bottom of the screen are to submit your request. Don't submit the request until you have marked the assessment as complete.

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.



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.



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.

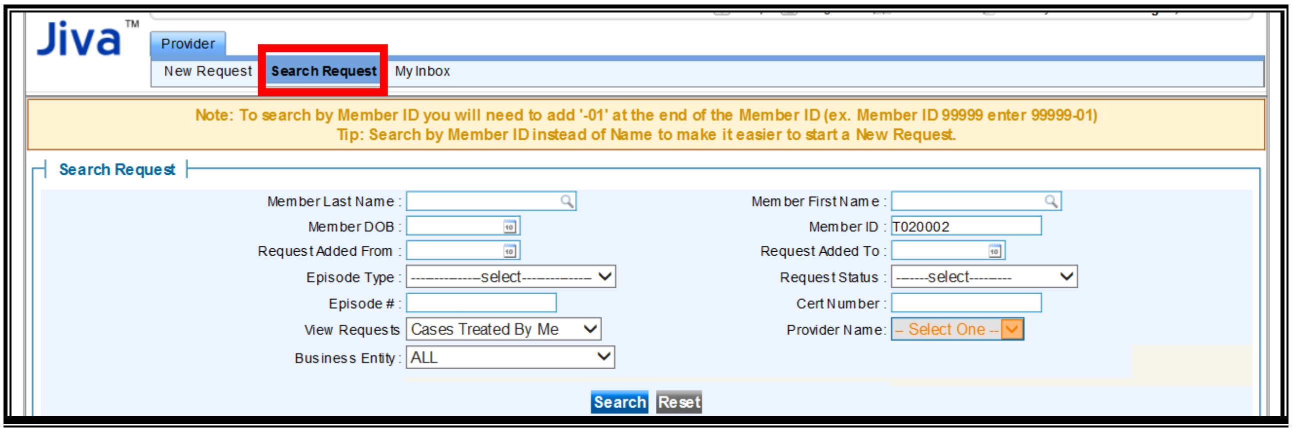
Searching for a Member

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.

Duplicate Case Check and Alert

Jiva will compare dates of service, treating provider and procedure request to other cases for the member. You will receive a warning message if a possible duplicate exists.

Jiva will not auto approve any case that is a possible duplicate. The request will be evaluated by the Utilization Management team.



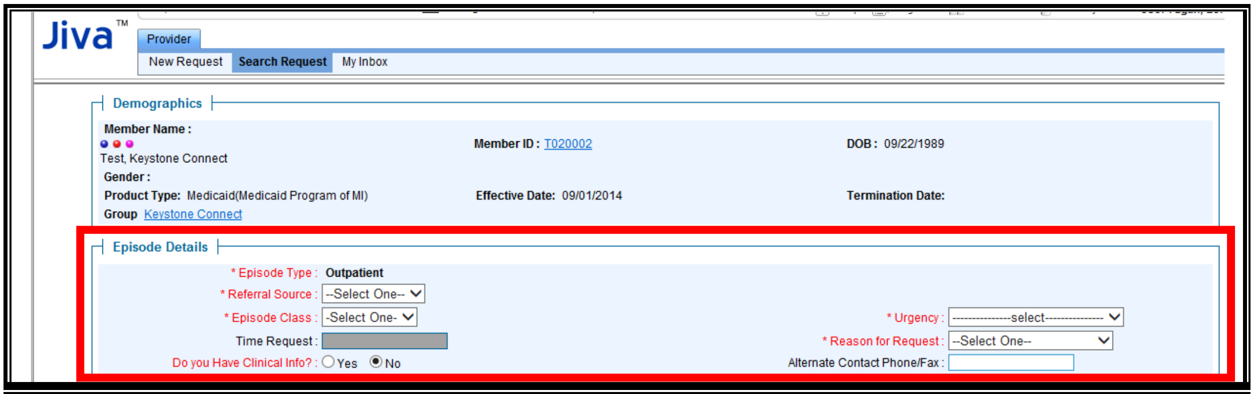
Step	Action
1.	Click on **Search Request** on the menu bar.
2.	Enter the “member ID” in the **member ID** field or the member’s name and DOB **<u>IMPORTANT</u>** – Please enter “-01” at the end of the member ID.
3.	Select “**Cases Treated By Me”** in the **View Requests** drop down menu.
4.	Verify that “**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 **<u>Note</u>** – Adding a request from this screen auto populates the member’s data.

When searching by member’s name you must fill out all three of the following fields:

- Member Last Name
- Member First Name
- Member DOB

Adding a New OP NonClinical Request – Adding Episode Details

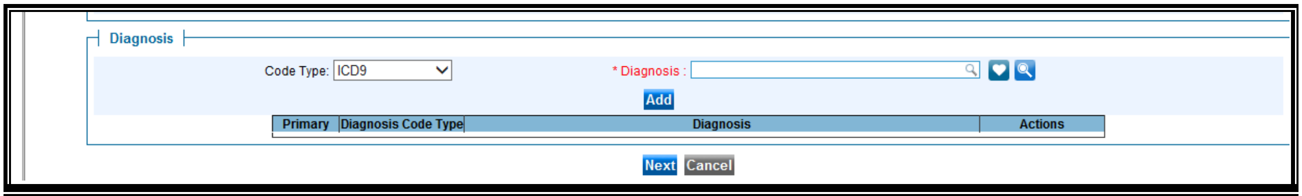
The member Demographics section will auto populate. Follow the steps below to complete the **Episode Details** section.



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

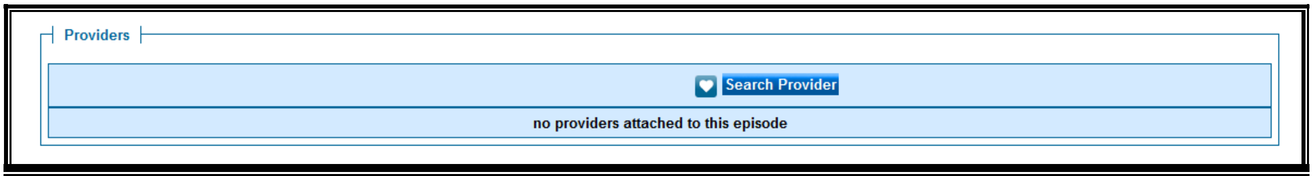
You can add multiple diagnoses from this screen or you can utilize the Favorites icon to save time and keystrokes. The "Favorites List" will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider's account. Reference chapter 8 "Diagnosis Favorites List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



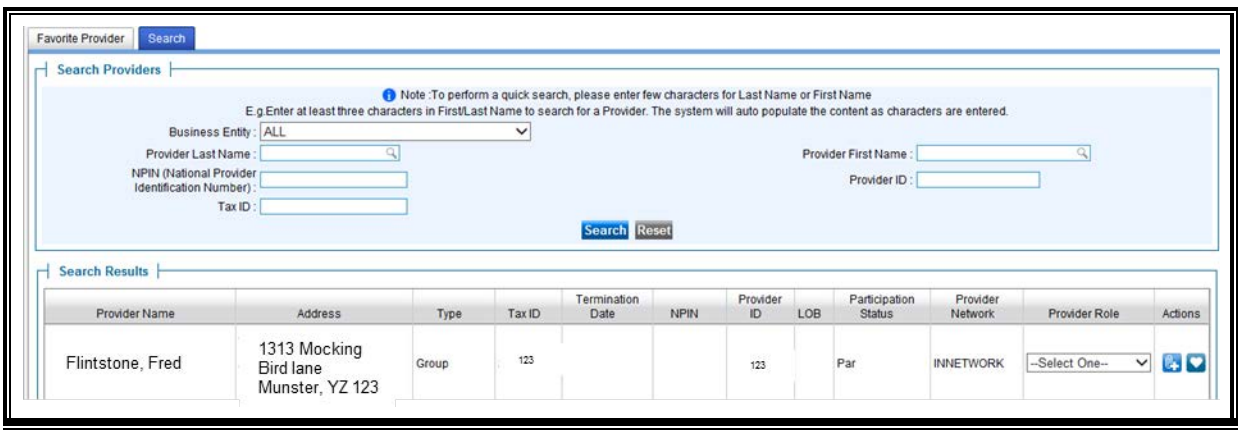
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Select the appropriate code in the Code Type drop down menu</td></tr>
<tr><td>2.</td><td>Type the diagnosis code in the Diagnosis field or click the search icon to initiate a search for the correct diagnosis</td></tr>
<tr><td>3.</td><td>Click the Add button to add the diagnosis to the request</td></tr>
<tr><td>4.</td><td>
<table>
<tr><th>IF</th><th>THEN</th></tr>
<tr><td>you want to add additional diagnoses</td><td>Repeat steps 2 and 3.

<u>Note</u>:
- 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 <u>do not</u> want to add additional diagnoses</td><td>Go to step 5.</td></tr>
</table>
</td></tr>
<tr><td>5.</td><td>Click the Next button.

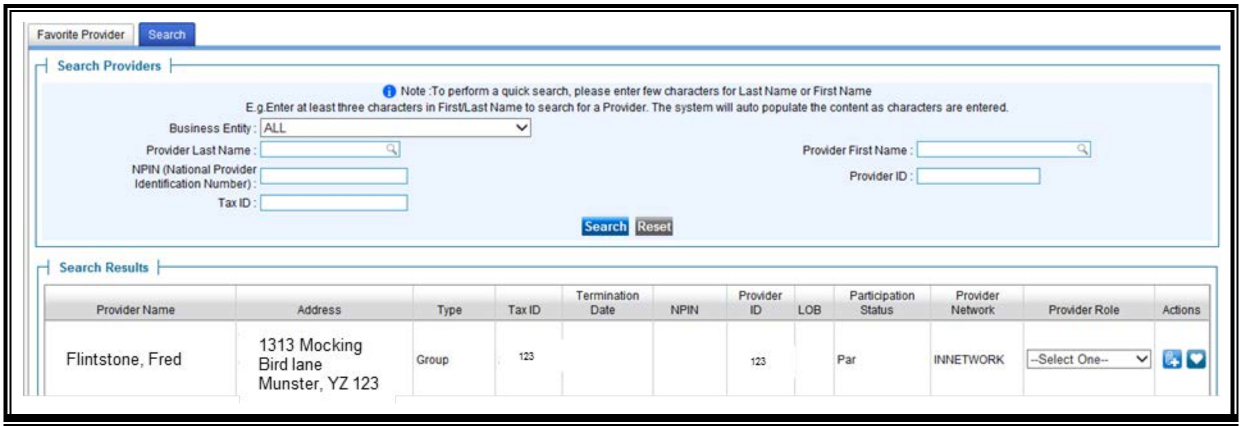
Result - The Providers section will appear.</td></tr>
</table>



Step	Action
1.	Click the **Search Provider** button  **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.”



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



Step	Action
4.	Select the appropriate role from the **Provider Role** drop down menu **<u>Note</u>** - 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
<u>Example:</u> For a home care request, attach the **Treating** role to the home care agency	

	Repeat steps 1 to 5 to add additional providers.

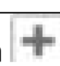
	If you need to change the provider role, reference "**How to Change the Provider's Role**" on the next page.

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.

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.

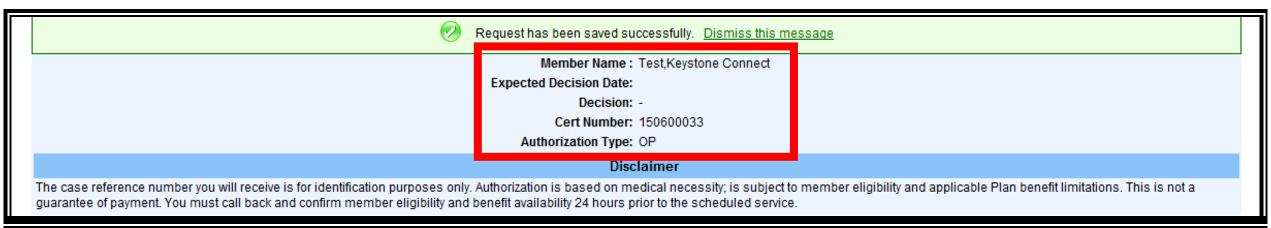
Step	Action
1.	Select the appropriate choice in the **Treatment Setting** drop down menu
2.	Select the appropriate choice in the **Treatment Type** drop down menu
3.	Type the service code in the **Service** field or click the search icon  to initiate a search for the correct service
4.	The “**Units/Visits**” 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.

	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 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.

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.” **<u>Note</u>** – The disclaimer window appears with the cert number.



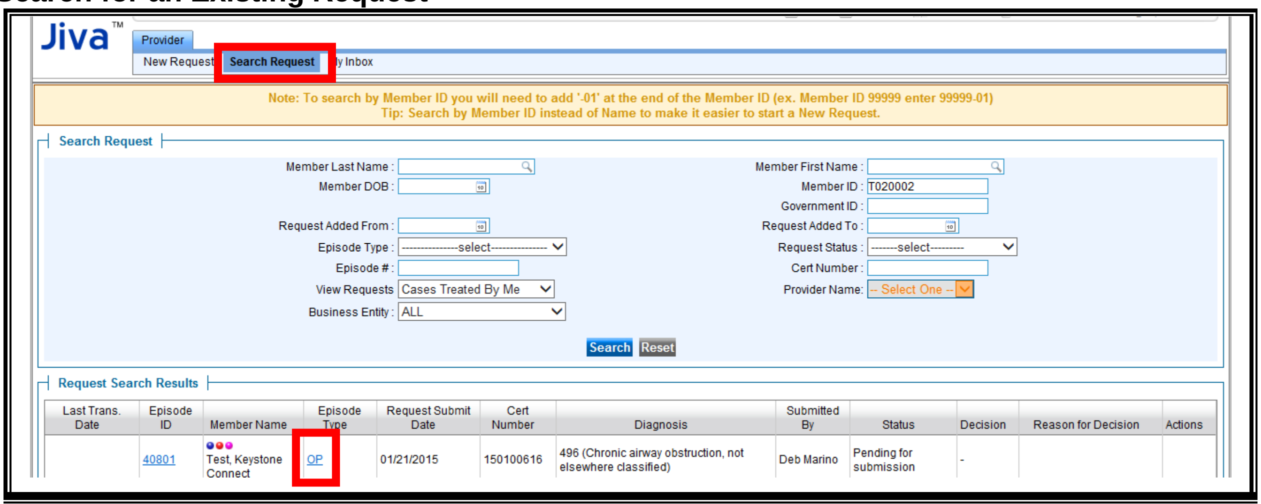
7 ADD CLINICAL TO AN EXISTING OP REQUEST

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



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Click Search Request on the menu bar from the dashboard.</td></tr>
<tr><td>2.</td><td>Enter the “certification number” in the Cert Number field.

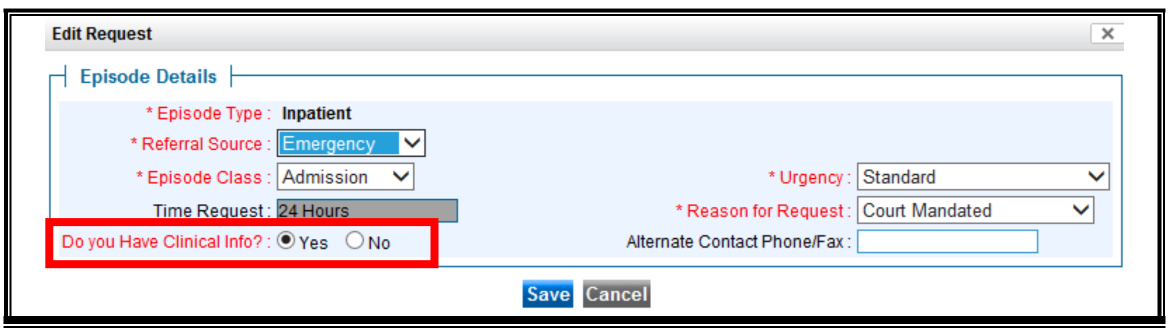
<u>Note</u> – You can also search using the member ID or name/DOB.</td></tr>
<tr><td>3.</td><td>Select “Cases Treated By Me” from the View Requests drop down box.
<table>
<tr><th>View Request Options</th><th>Description</th></tr>
<tr><td>PCP Cases</td><td>displays requests for members associated with 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>
</table></td></tr>
<tr><td>4.</td><td>Select your Business Entity from the drop down box.</td></tr>
<tr><td>5.</td><td>Click the Search button.</td></tr>
<tr><td>6.</td><td>Locate the case where you wish to add clinical information.</td></tr>
<tr><td>7.</td><td>Click on the hyperlink in the Episode Type column to access the request</td></tr>
</table>

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.

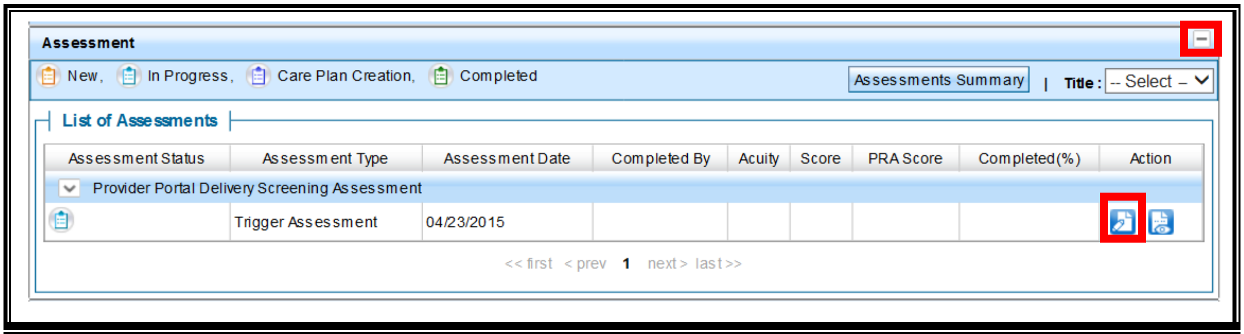
Step	Action
1.	Click the **Edit** hyperlink in the **Episode Details** section. **Result** – the **Edit Request** window will appear.



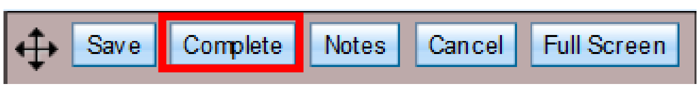
Step	Action
2.	Select the **Yes** radio button to the question "**Do you have clinical info**" **Note** - The system will offer an assessment if available for the request that may trigger the auto approval functionality.
3.	Click the **Save** button
4.	Click the "**Show**" icon to expand the **Assessment**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

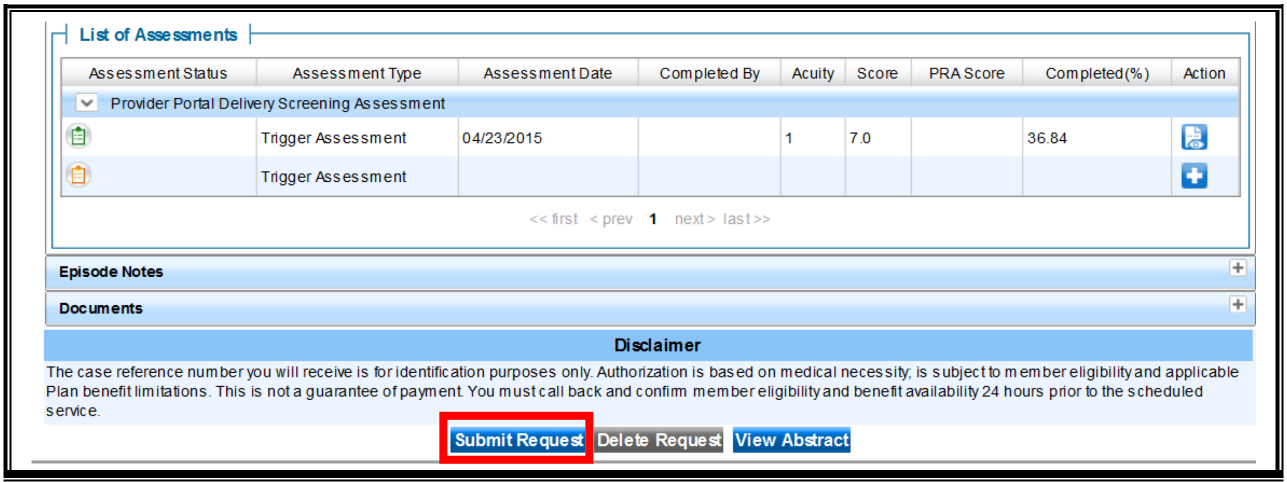
Adding Clinical Information to an Existing OP Nonclinical Request – Assessment

If there is an assessment available, it will be 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.

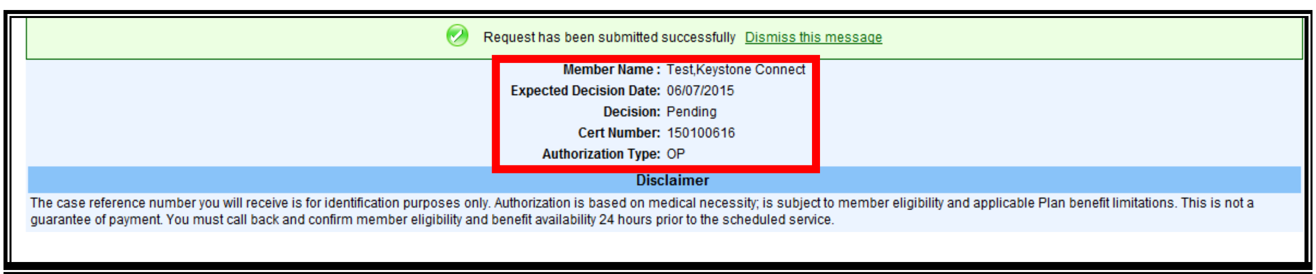


	The buttons at the bottom of the screen are to submit your request. Don’t submit the request until you have marked the assessment as complete.

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.

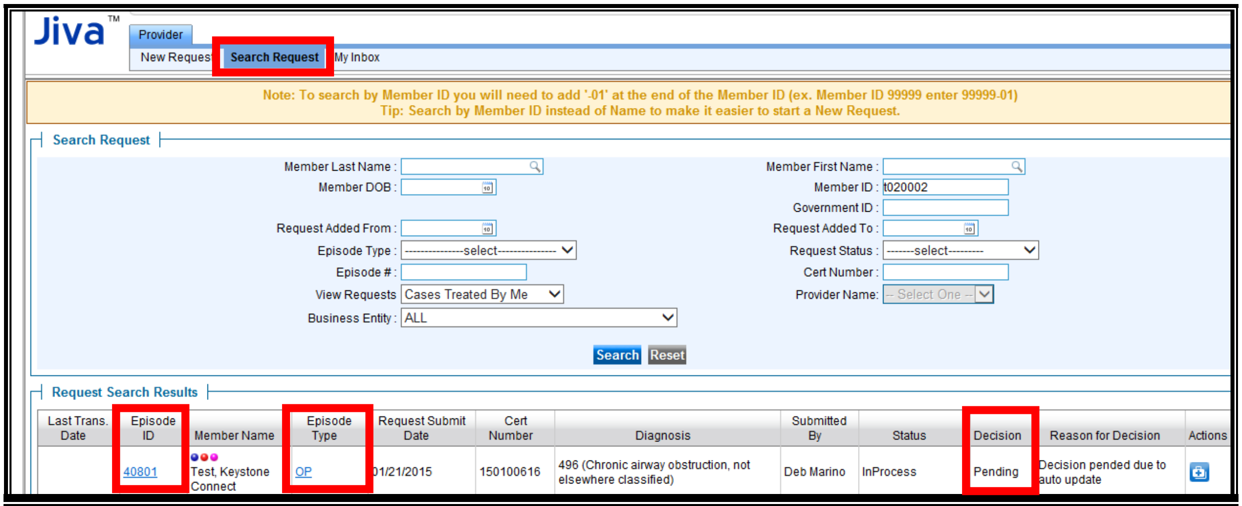


Step	Action
1.	Click on the **Submit Request** button to submit your request.
2.	Click the **OK** button when asked “Do you want to Submit Request.” **<u>Note</u>** – The disclaimer window appears with the decision and cert number.



8 ADDITIONAL PROCESSES

Search for a Determination



Step	Action
1.	Click **Search Request** on the menu bar from the dashboard.
2.	Enter the "certification number" in the **Cert Number** field. **<u>Note</u>** – You can also search using the member ID or name/DOB.
3.	Select "**Cases Treated By Me**" from the **View Requests** drop down box.
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).

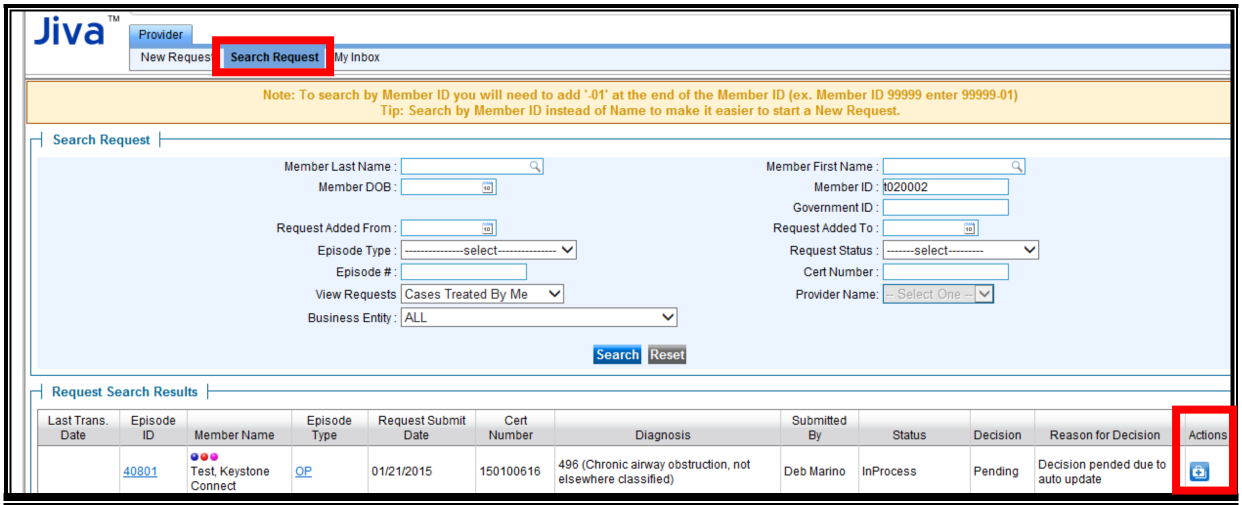
View Request Options	Description
PCP Cases	displays requests for members associated with doctor's panel
Cases treated by me	displays requests associated with the selected business entity
Cases submitted by me	displays requests entered by the person who is logged in

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.

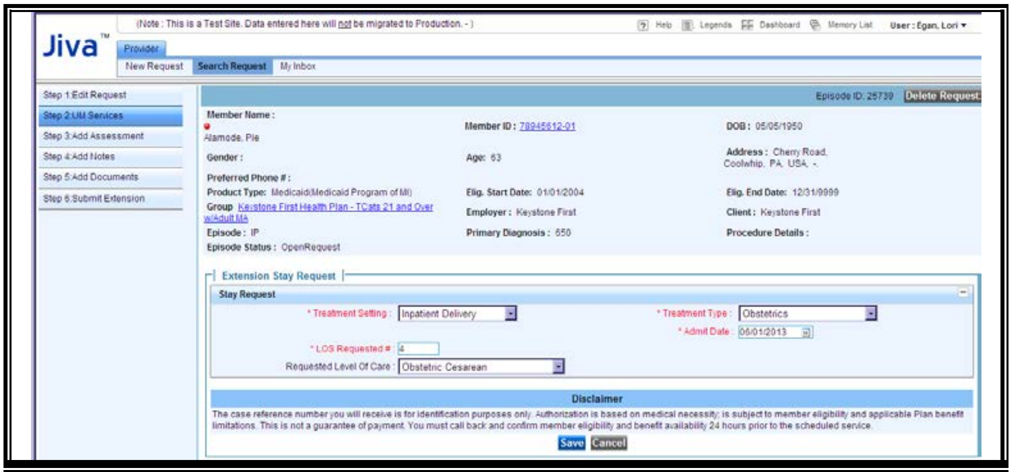
Extending an Existing Request

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.



Step	Action
1.	Click **Search Request** on the menu bar from the dashboard.
2.	Enter the "certification number" in the **Cert Number** field. <u>**Note**</u> – 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><tr><th>View Request Options</th><th>Description</th></tr><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></table>
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.

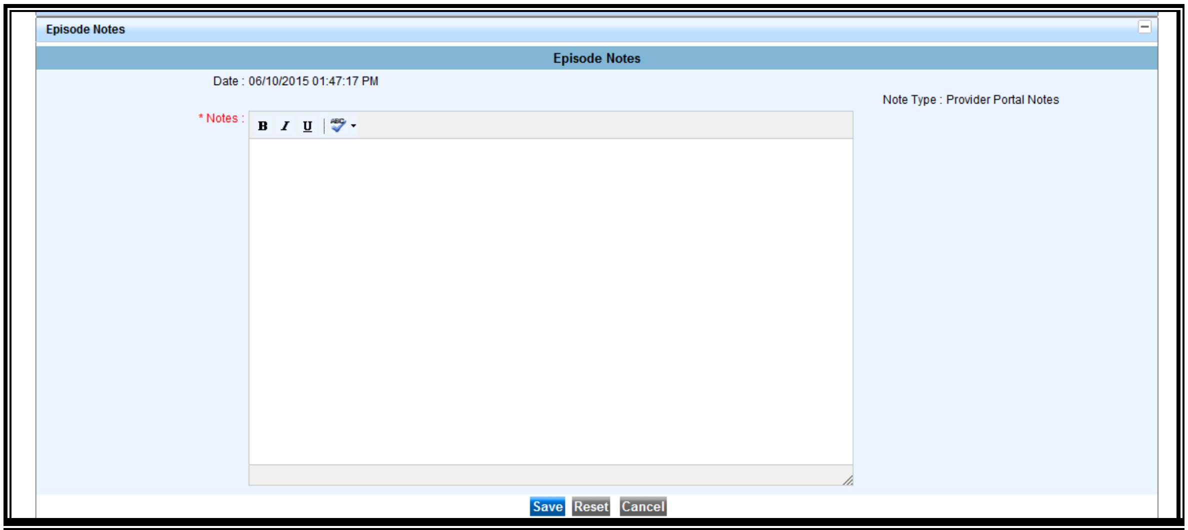
Extending an Existing Request (con’t)



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8.</td><td>Click on Step 2: UM Services in the left navigation window.</td></tr>
<tr><td>9.</td><td>Click on the extend icon in the actions column.</td></tr>
<tr><td>10.</td><td>Enter the “number of days” you are requesting in the LOS Requested # field for IP and in the Units/Visits field for OP.</td></tr>
<tr><td>11.</td><td>Click on Step 3: Add Assessment in the left navigation window.
<table>
<tr><th>IF</th><th>THEN</th></tr>
<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>
</table></td></tr>
<tr><td>12.</td><td>Click on the modify icon to open the assessment.</td></tr>
<tr><td>13.</td><td>Answer the questions.
<u>Note</u> – Questions in red are mandatory.</td></tr>
<tr><td>14.</td><td>Click the Complete button to trigger the auto approval rules.
<u>Note</u>- the Save button will not trigger the auto approval rules.</td></tr>
<tr><td>15.</td><td>Click on Step 4: Add Notes in the left navigation window.</td></tr>
<tr><td>16.</td><td>Click the Add Notes button</td></tr>
<tr><td>17.</td><td>Type the extension notes in the Notes section</td></tr>
<tr><td>18.</td><td>Click the Save button</td></tr>
<tr><td>19.</td><td>Click on Step 6: Submit Extension in the left navigation window.</td></tr>
<tr><td>20.</td><td>Click on the Submit Request button to submit your extension request.</td></tr>
</table>

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.

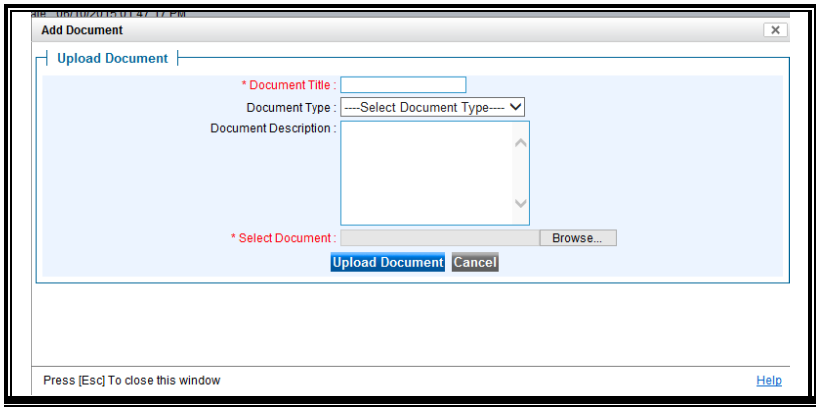


Step	Action
1.	Click the “Show” icon ➕ in the right hand corner to expand this section
2.	Click the **Add Notes** button
3.	Enter the appropriate notes in the notes section. Be sure to include your **name** and **contact information** in the event the plan needs to contact you. **Note**- Spell check 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

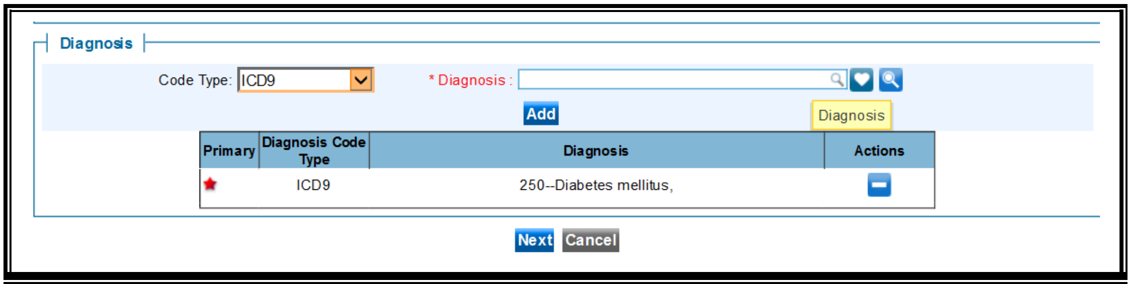
It is recommended that you save the document to a location that you can easily find. For example, save the document to your desktop. The **Documents** field is compressed so you must click the "Show" icon in the right hand corner to expand this section.



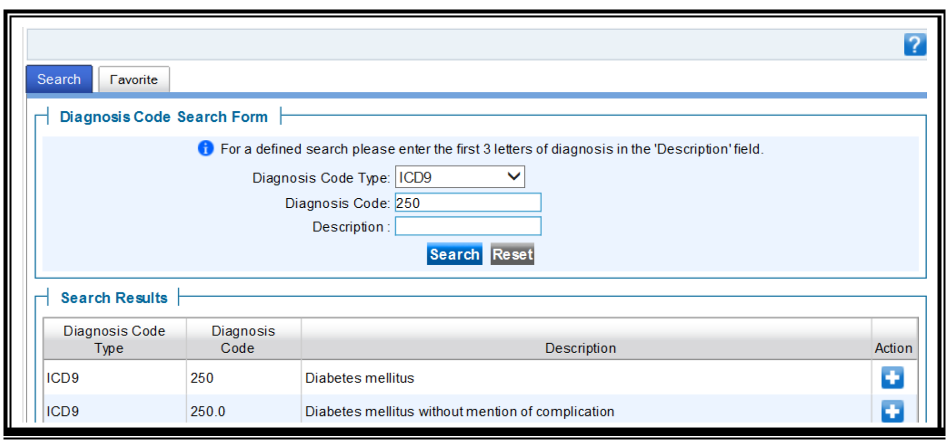
Step	Action
1.	Click the "Show" icon in the right hand corner to expand this section
2.	Click the **Add Documents** button **Result** – The **Add Document** window appears
3.	Enter the "title of the document" in the **Document Title** field
4.	Select the most appropriate **Document Type**
5.	Optional: 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

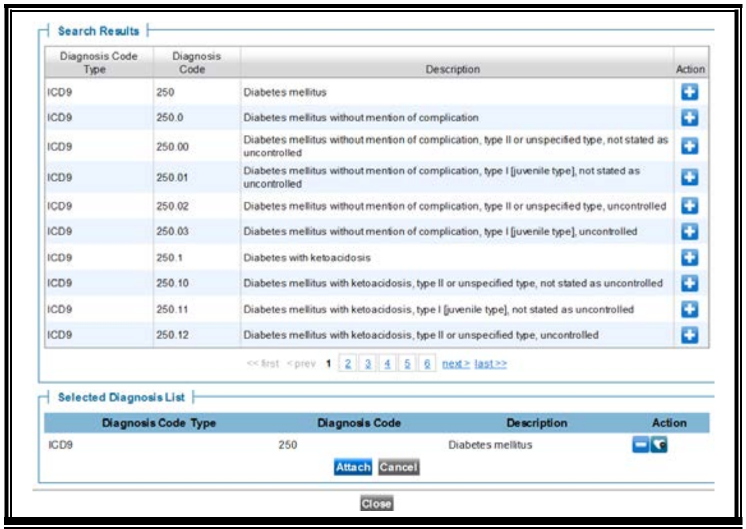
The "**Favorites List**" will allow you to create and manage a list of frequently used diagnoses. The list is unique to the provider's account. The steps for creating a "**Favorites List**" are below.



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



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.



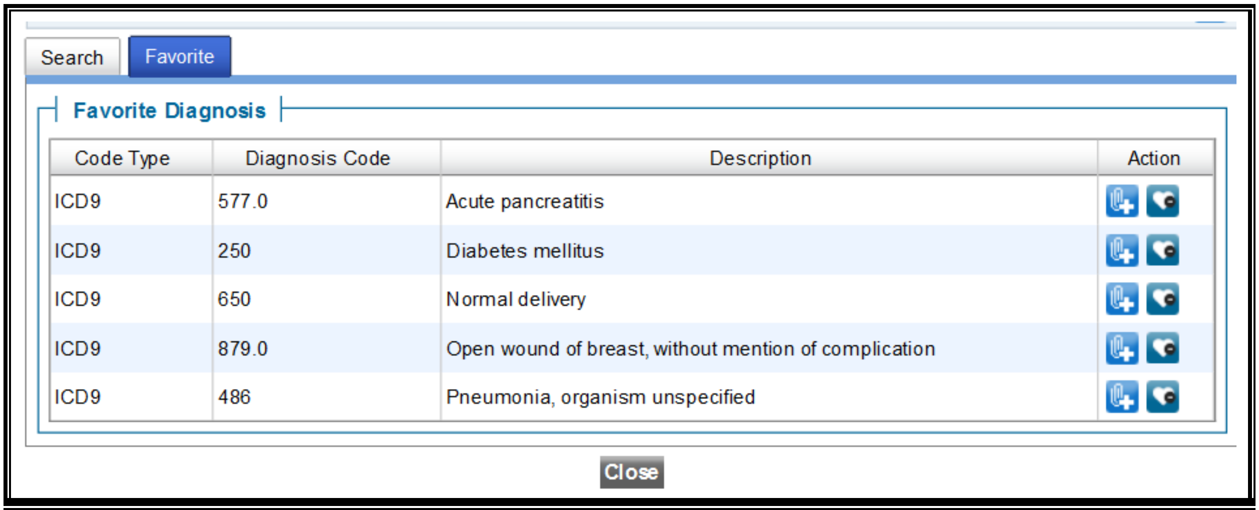
<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>4.</td><td colspan="2">Click the add icon next to the diagnosis of your choice

Result – the selected diagnosis will appear in the “Selected Diagnosis List” at the botom of the screen.</td></tr>
<tr><th colspan="2">IF</th><th>THEN</th></tr>
<tr><td colspan="2">you wish to add the diagnosis to the request</td><td>go to step #5</td></tr>
<tr><td colspan="2">you wish to add the diagnosis to your “Favorists List”</td><td>Click on the heart icon 

<table><tr><th>IF</th><th>THEN</th></tr><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></table></td></tr>
<tr><td>5.</td><td colspan="2">Click on the “Attach” button to add the diagnosis to the request.</td></tr>
</table>

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.**”



Code Type	Diagnosis Code	Description	Action
ICD9	577.0	Acute pancreatitis	
ICD9	250	Diabetes mellitus	
ICD9	650	Normal delivery	
ICD9	879.0	Open wound of breast, without mention of complication	
ICD9	486	Pneumonia, organism unspecified	

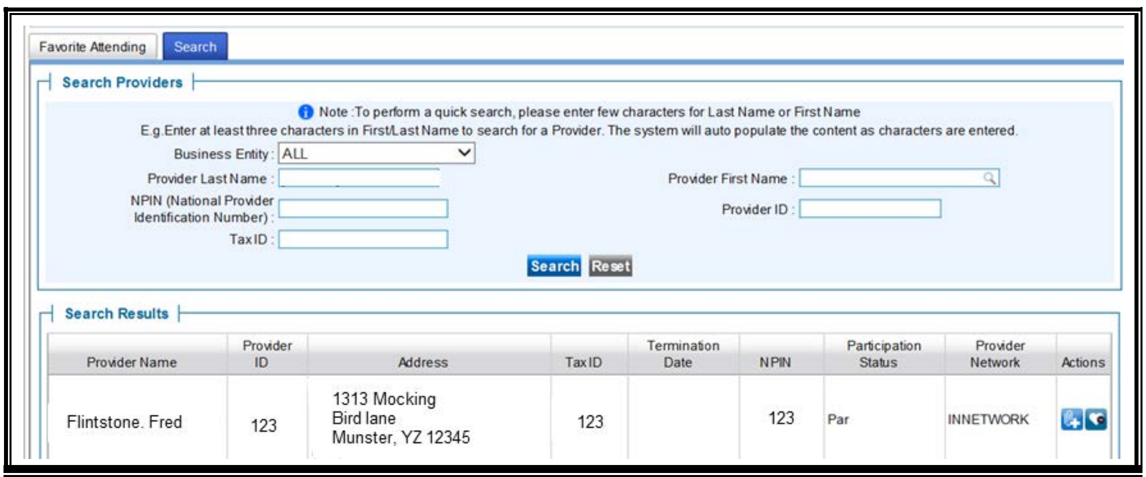
Step	Action
1.	Click on the heart icon in the diagnosis section of the new request **Result** – The “Favorite Diagnosis” window opens.
2.	Click on the add icon to add the diagnosis to the request
3.	After you have added the diagnosis, click on the “Next” button to display the next mandatory section of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

	Click the remove icon to remove a diagnosis from your “**Favorites List**.”

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.

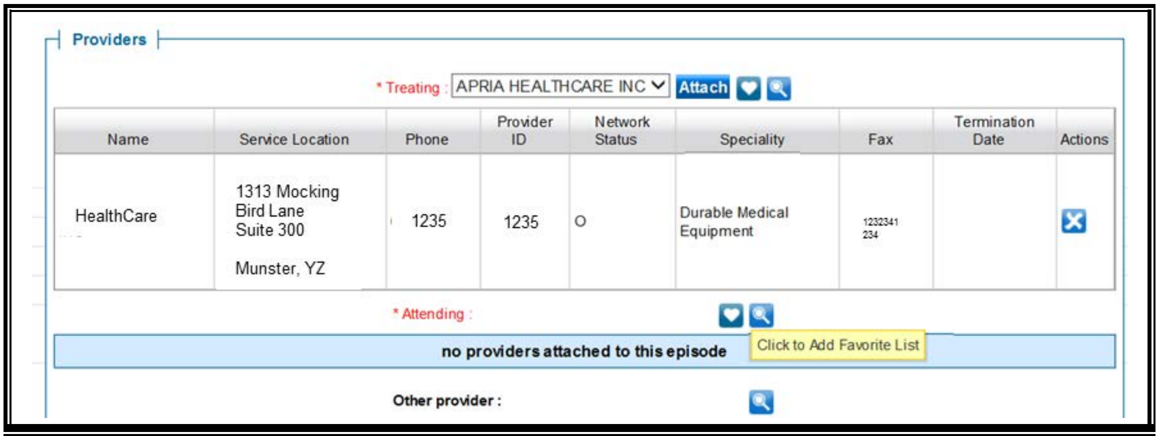
Step	Action
1.	Click the provider search icon to initiate the serach. **Result** – The “Search Providers” window appears.



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

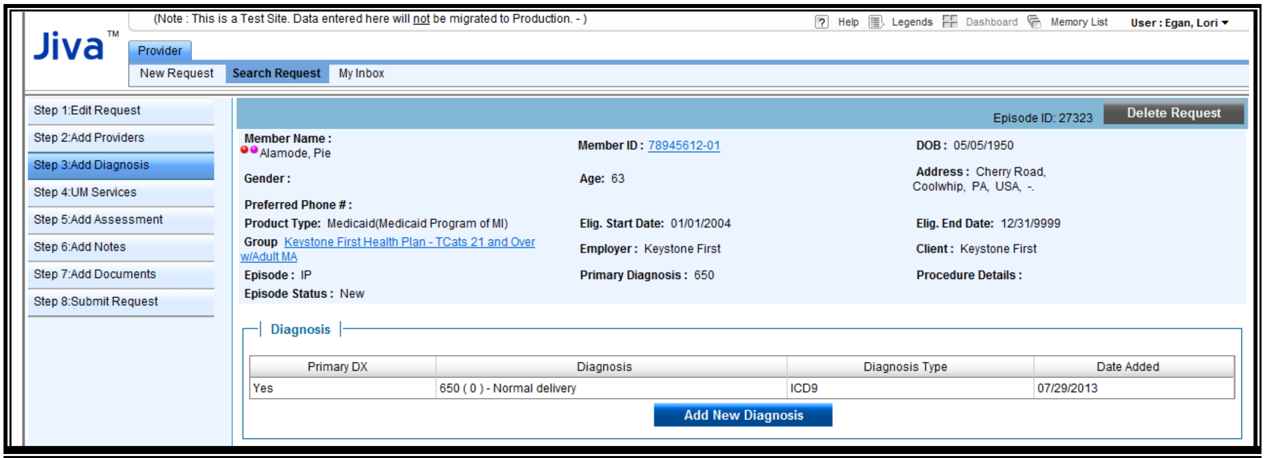
Providers Favorites List – Utilizing a Favorites List

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**.”



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.