



HEALTH **SOURCE**

6.0 Release Notes

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New Delivery Method for CMS Contractor Requesters

Introduction

Electronic Submission of Medical Documentation System (esMD) is an electronic delivery method developed by CMS to deliver medical records related to claims being audited by Medicare. Historically, esMD delivery of medical records was only available to clients that utilized Ciox’s AudaPro or HIHPro applications. These clients receive audit medical record requests from Review Contractors (RC) that work with CMS, and they track the larger claim audit process there as well. Recently, it has become necessary to provide this same electronic delivery method (esMD) for Ciox’s ROI client base as well.

Feature Summary

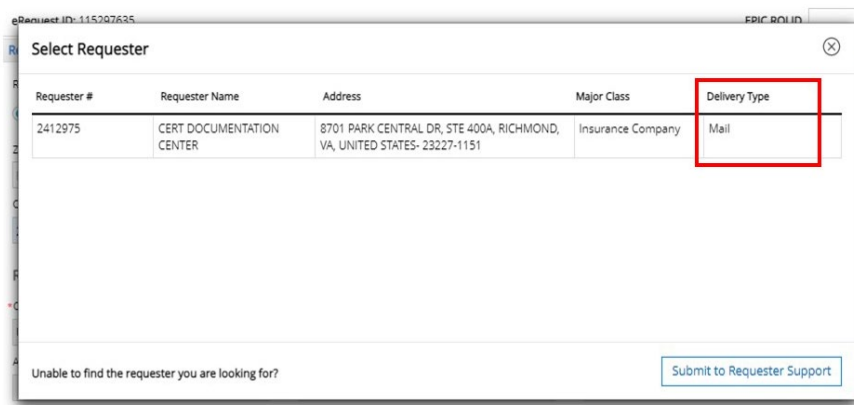
HealthSource has enabled Requester 2412975, CERT Documentation center, Contractor for esMD delivery from HealthSource. All requests *manually logged* for this Requester are delivered electronically via the Center for Medicare Services, CMS gateway (via secured record transmission).

1. First, the record is transmitted to CMS. An acknowledgement is sent from CMS to Ciox that states whether the record was received successfully.
2. CMS then routes the record to the RCs for receipt. Another acknowledgement is sent by CMS to CIOX.
3. The RCs then confirm receipt of the requested medical record. A third acknowledgement is sent, if successful, that the record delivery is complete.
4. In addition to the acknowledgements, CIOX receives a transaction ID which is used to identify the transmission if CMS needs to review or troubleshoot.

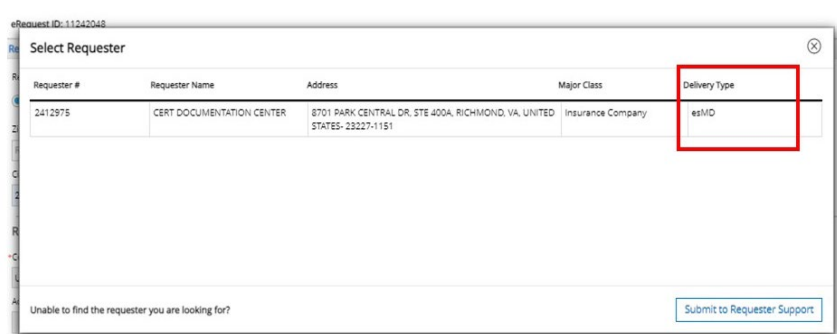
Note: Any record that is attempted to be sent using esMD and the record transmission has failed (i.e. api unavailable) and cannot be retried will be routed to paper.

HealthSource Logging & Fulfillment

When searching for this Requester, before changing the Requester to esMD, the Delivery Type was Mail



After changing this Requester, the Delivery Type is esMD

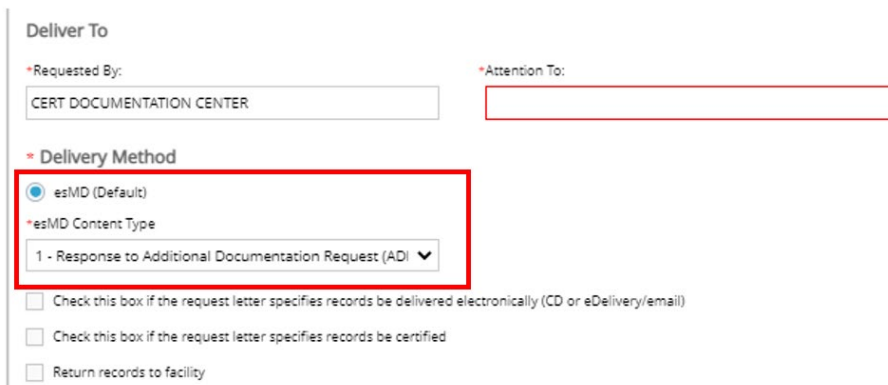


Requester #	Requester Name	Address	Major Class	Delivery Type
2412975	CERT DOCUMENTATION CENTER	8701 PARK CENTRAL DR, STE 400A, RICHMOND, VA, UNITED STATES- 23227-1151	Insurance Company	esMD

Unable to find the requester you are looking for? [Submit to Requester Support](#)

When an esMD Requester has been selected:

- The **Delivery Method** auto defaults to esMD, and the **esMD Content Type** to Response to Additional Documentation Request (ADR).



Deliver To

*Requested By: CERT DOCUMENTATION CENTER *Attention To:

* Delivery Method

esMD (Default)

*esMD Content Type

1 - Response to Additional Documentation Request (ADI) ▼

Check this box if the request letter specifies records be delivered electronically (CD or eDelivery/email)

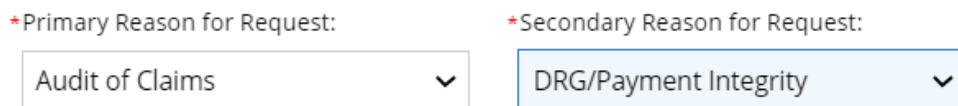
Check this box if the request letter specifies records be certified

Return records to facility

Note: Requests that originate in AudaPro and flow into HealthSource will continue to follow the existing workflow.

The following Reason for Request can be selected for CMS CERT request letters and is non-billable:

- Primary Reason, **Audit of Claims**
 - Secondary Reason, **DRG/Payment Integrity**



*Primary Reason for Request: ▼

*Secondary Reason for Request: ▼

Note: The request must be fulfilled within the specified time frame to the requesting contractor.



Below is an example of a CMS CERT Request Letter for the Requester, CERT Documentation Center



RECEIVED
MAY 02 2018

[Redacted]

ATTN: MEDICAL RECORDS

Date: 03/30/2018
Reference ID: CID #: [Redacted]
NPI/Provider #: [Redacted]
Phone:
Fax:

Request Type & Purpose: First Letter
Subject: Additional Documentation Required.

Dear Medicare Provider/Supplier,

The Centers for Medicare & Medicaid Services (CMS), through the Comprehensive Error Rate Testing (CERT) program, carries out the task of requesting, receiving, and reviewing medical records. The CERT program reviews selected Medicare A, B and DME claims and produces annual improper payment rates. For more information regarding the CERT program, please visit www.cms.gov/CERT.

- The Claim Number and Case ID are required to be entered

Patient Information

*Last Name: <input type="text" value="Test"/>	*First Name: <input type="text" value="Test"/>	DOB: <input type="text" value="mm/dd/yyyy"/>
MRN: <input type="text"/>	*Claim #: <input type="text"/>	*Case ID: <input type="text"/>

*Case ID has to be entered and must

Note: If Case ID has only 7 digits, 0000 (four zeroes) can be added at the end of the case ID.

- The NPI (National Provider Identifier) is required to proceed with Logging & Fulfilling

Medical Information

* Provider

Zip: <input type="text"/>	Address 1: <input type="text"/>	Address 2: <input type="text"/>	City: <input type="text"/>
State: <input type="text"/>	First Name: <input type="text"/>	Last Name: <input type="text"/>	Organization Name: <input type="text"/>
NPI: <input type="text"/>	<input type="button" value="Find Provider"/>		

- When the request is fulfilled and submitted, a successful esMD delivery is in History as seen below

Request History 📄 ⓧ

eRequest ID: 11242045 Site: 00135
 Log ID: 139707168 Request Status: Delivered

Date	User Name	Event Description
08/17/2022 02:37 PM	System Auto	HS workflow completed successfully
08/17/2022 02:37 PM	WORKFLOW	Request State changed from ESMD_DLVY to DELIVERED
08/17/2022 02:25 PM	Svc Esmd Unityqa	esMD Request was successfully delivered Via CMS.
08/17/2022 02:25 PM	Svc Esmd Unityqa	esMD - Review Contractor Pickup the documents from Enterprise File Transfer
08/17/2022 02:10 PM	System Auto	Message send to storage queue: hs-delivery-service-queue successfully
08/17/2022 02:10 PM	WORKFLOW	Invoicing completed
08/17/2022 02:10 PM	WORKFLOW	Request State changed from INVOICE to ESMD_DLVY
08/17/2022 02:10 PM	WORKFLOW	Invoicing started
08/17/2022 02:10 PM	WORKFLOW	Request State changed from ADDR_VALID to INVOICE
08/17/2022 02:07 PM	WORKFLOW	Indexing completed

Frequently Asked Questions on esMD Delivery Failure

Question: What if the esMD delivery fails?

Answer: Operations need to log an ITSD ticket and specify that it is an esMD request and provide the site and invoice number or eRequest ID in the ticket.

Question: Who will be notified of the esMD delivery failure?

Answer: A Summary Report will be generated, and it will be routed to ASM-CRI team and the esMD support team.

Question: How does ASM respond?

Answer: The esMD support team will respond via email to the User who logged the ticket, and a FedEx tracking number will be provided if the record is mailed.

Administrator setup - esMD Requester Set up in HealthSource Platform Admin

Step 1:

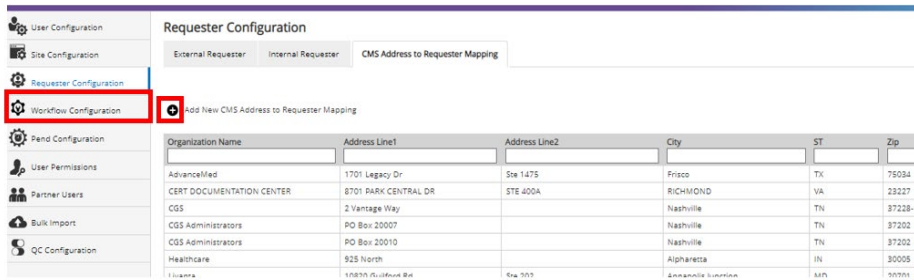
User Permissions and Roles required to set up a new Requester: Internal Management, Group Administrator and New Requester

Clarity Roles / Permissions

PERMISSIONS	Internal Management	CIOX Executive	Group Administrator	Customer Service	Business Office	External Management	Logger Centralized	Logger Centralize Supervisor	New Requester	Account Management	Client Service Representative	Internal Operations	External Operations	External Customer	Electronic Integration	Electro Search
Add New Request	✓		✓			✓		✓		✓		✓	✓			
Add New Requester									✓							
Administration			✓													
Bulk Cancel		✓	✓							✓						
Certify	✓		✓			✓					✓	✓	✓			
CMS Address to Requester Mapping	✓		✓						✓							

Step 2:

Go to Requester Configuration Tab: Click "⊕" to Add New CMS Address to Requester Mapping



Requester Configuration

External Requester Internal Requester CMS Address to Requester Mapping

⊕ Add New CMS Address to Requester Mapping

Organization Name	Address Line1	Address Line2	City	ST	Zip
AdvanceMed	1701 Legacy Dr	Ste 1475	Frisco	TX	75034
CERT DOCUMENTATION CENTER	8701 PARK CENTRAL DR	STE 400A	RICHMOND	VA	23227
CGS	2 Vantage Way		Nashville	TN	37228-15
CGS Administrators	PO Box 20007		Nashville	TN	37202
CGS Administrators	PO Box 20010		Nashville	TN	37202
Healthcare	925 North		Alpharetta	GA	30005
Illiana	10255 Alshire Rd	Ste 503	Indianapolis	IN	46251

Step 3:

Enter the details in the fields below. **OID needs to be entered for esMD delivery to be effective.**

Organization Name	Address Line1	Address Line2	City	ST	Zip	OID	Requester Number	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Save Cancel Map

Step 4:

Click Save.

Note: The 'Map' feature under Action can be used to look up the Requester to populate Requester Number field.

Find Requester

Zip:

Address:

Name:

Ciox Requester ID:

Select Requester

Requester Number	Requester Name	Address	Requester Type	Default Delivery	Status
2412975	CERT DOCUMENTATION CENTER	8701 PARK CENTRAL DR, STE 400A, RICHMOND, VA, UNITED STATES-23227-1151	Insurance Company	esMD	Disabled



Pull List Child Coversheet Parent eID

The Ciox generated Coversheet for a child now contains the parent eRequest ID in the top section. With HealthSource Release 5.19, 08/11/22, the parent Request Letter/Coversheet is no longer copied to each of the child requests. Instead, the child has its own Coversheet. The Parent eRequest ID was added to the child Coversheet so Users don't have to go to the History screen to get the parent eID.

CioxHealth E-REQUEST LETTER

Site #	13270
eRequest ID	3553191
Parent eRequest ID	3553189
Requestor Name	SAGICOR LIFE INSURANCE CO
Requestor Type	Insurance
Address	PO BOX 52121, PHOENIX, AZ 85072-2121

General Information	Patient Information	Delivery Information	Medical Information
Requestor Reason : Insurance Underwriting	Patient Name: child two King Date of Birth: 01/01/2000	Dates of Service: 01/01/2022 01/03/2022	Medical Record Types: Admission Report,After Visit Summary,Bone Density Scan,Cardiac Cath records,Cardiac



Login Screen and Loading Images

Several image changes have been applied to HealthSource. The following changes have been made:

- Login screen
 - white background (no lake image)
 - updated Ciox logo
 - updated HealthSource logo



- “Loading...” popup message replaced with an animated purple and orange image



User Experience & Technical Enhancements

User Type (End-User, Administrator, Technical)	Area	Problem/Error Solution implemented/amended behavior	Reference #
End-User	Cancel Request	Comments entered while cancelling a request from the Search results screen are not being saved Cancellation comments are not saved (resolved in Release 5.19)	60913
Administrator	Platform Admin	Image changes to login page, logos, and loading messages Revised logos, login image, and “Loading” messages are updated (see previous pages)	59546
Administrator	Platform Admin - esMD	The Requester Configuration function has a new tab, CMS Address to Requester Mapping, to map an external Requester to the CMS gateway for delivery of records A new permission to access the new tab was added to 3 User Roles. (see previous pages)	55187
Administrator	Site Configuration- Bulk Edit	When editing the Site Settings checkboxes, the 3 rd party Integration field settings are no longer updated A warning message displays when editing Advance Settings in bulk to remind user that changes apply to all Sites	62189
Technical	Swellbox	Send request status changes real-time to Swellbox for request notifications to requester	62195
Technical	Technical	Update the minimum pod config of hs-audittrailworker	62430
Technical	3 rd Party Publishing	Request Letter containing a form didn't show the data.	62628