HealthSource Clarity Processing Audits/Embedded Support

Version: 1
Release Date: 2.12.19

Processing Audits/Embedded Support in HealthSource

Overview

Introduction

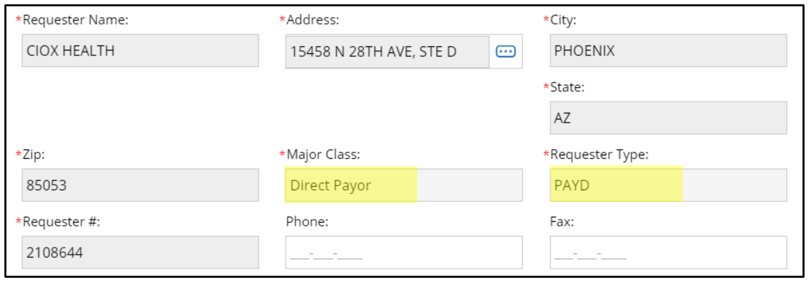
This job aid contains important information for processing audits in HealthSource.

Contents

PAYD Audits

Introduction

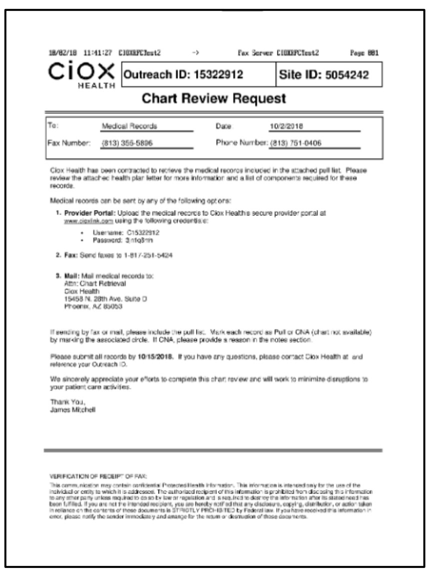
Health Plan request volume processed by the Ciox CDAI (Payor) team is known as PAYD. “D” is short for “direct” meaning the request is originating within Ciox and going “Direct” to your site. These audits were previously referred to as *managed projects* or *audits*.



When Ciox/Partner ROI teams use HealthSource, we deliver the jobs back to the Ciox Payor team (based in Phoenix, AZ). The Payor Team performs additional QA and ultimately delivers the Medical Records to our Customer (the Health Plan/Third Party).

Processing PAYD Requests

PAYD requests will contain a Ciox coversheet, then a request “packet” which includes request information and a list of patients.



10/02/18 11:41:27 CIOXRPCTest2 -> Fax Server CIOXRPCTest2 Page 001

CIOX HEALTH | Outreach ID: 15322912 | Site ID: 5054242

Chart Review Request

To:	Medical Records	Date:	10/2/2018
Fax Number:	(813) 355-5896	Phone Number:	(813) 751-0406

Ciox Health has been contracted to retrieve the medical records included in the attached pull list. Please review the attached health plan letter for more information and a list of components required for these records.

Medical records can be sent by any of the following options:

1. **Provider Portal:** Upload the medical records to Ciox Health's secure provider portal at www.cioxlink.com using the following credentials:
   - Username: C15322912
   - Password: [illegible]
2. **Fax:** Send faxes to 1-817-251-5424
3. **Mail:** Mail medical records to:
   Attn: Chart Retrieval
   Ciox Health
   15458 N. 28th Ave, Suite D
   Phoenix, AZ 85053

If sending by fax or mail, please include the pull list. Mark each record as Pull or CNA (chart not available) by marking the associated circle. If CNA, please provide a reason in the notes section.

Please submit all records by **10/15/2018.** If you have any questions, please contact Ciox Health at and reference your Outreach ID.

We sincerely appreciate your efforts to complete this chart review and will work to minimize disruptions to your patient care activities.

Thank You,
James Mitchell

VERIFICATION OF RECEIPT OF FAX:

This communication may contain confidential Protected Health Information. This information is intended only for the use of the individual or entity to which it is addressed. The authorized recipient of this information is prohibited from disclosing this information to any other party unless required to do so by law or regulation and is required to destroy the information after its stated need has been fulfilled. If you are not the intended recipient, you are hereby notified that any disclosure, copying, distribution, or action taken in reliance on the contents of these documents is STRICTLY PROHIBITED by Federal law. If you have received this information in error, please notify the sender immediately and arrange for the return or destruction of these documents.

If you receive a packet at your site:

- Obtain site approval to process the audit if required
- Check to see if the audit has been autoloaded directly to your site in HealthSource
- If not, see the Importing PAYD Requests into HealthSource section of this job aid for import the requests into your fulfillment work queue

Continued on next page

Important Notes

PAYD requests do not go through the standard “logging” process. When they are pushed to your site, or you import them into HS, they will show in fulfillment status:

- If you use Central Intake, do not resubmit these requests to logging for questions/changes as this will cause unnecessary delays. The Central Intake team did not log these requests and will have no further information about them to help you process.
- The request letter will state to send the records to the Ciox Phoenix location, however the address on the logging screen in HealthSource is that of the actual requester. This visual inconsistency is acceptable for these types of audits ONLY.

Example on the request letter:

Mail To: CIOX Health (Attention Chart Retrieval)
15458 N. 28th Ave. Suite D; Phoenix, AZ 85053

HealthSource Data Entry details:

*Name:	*Address 1:	Address 2:
ECS OPTUM PHYSICIANS MRA	7105 MOORES LANE	
Address 3:	*City:	*State:
	BRENTWOOD	TN

Getting Help

For questions or help with the fulfillment of PAYD audits such as none of the members are at this location, site requires specific information on the pull list, or site will not allow Ciox to process audits/chart reviews for this health plan:

- Self Service - Establish a ticket notifying the EST (Embedded Support Team) of the issue – see the Appendix of this job aid for how to log a ticket.
- If you do not have access you can send the information regarding the issue to EmbeddedSupport@CioxHealth.com. The team monitoring this mailbox will generate the ticket on behalf of the individual sending the email.

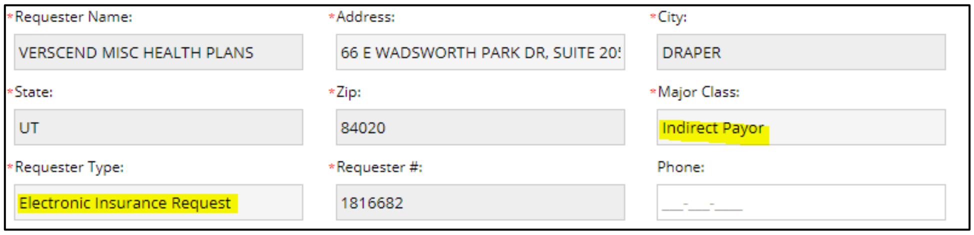
For technical support, contact:

- IT Service Desk Support – 1.877.358.6939
  or servicedesk@cioxhealth.com
- Fast CHAT (Available for 2 weeks following a release GO LIVE to HealthSource) – 1.678.287.7090
  or healthsourcesupport@cioxhealth.com

PAYI Audits

Introduction

Audits sent to facilities through a Third-Party Requester (i.e. Health EC, Optum, etc.) or straight from Health Plans (Aetna, United, Blue Anyone) are known as PAYI audits. “I” is short for “indirect” meaning the request is not originating from within Ciox.


*Requester Name: VERSCEND MISC HEALTH PLANS
*Address: 66 E WADSWORTH PARK DR, SUITE 20!
*City: DRAPER
*State: UT
*Zip: 84020
*Major Class: Indirect Payor
*Requester Type: Electronic Insurance Request
*Requester #: 1816682
Phone: ___-___-____

Processing PAYI Request

When you receive a PAYI Audit request, process using the guidelines below.

Sites that send requests to Central Intake for logging:

If ...	Then ...
The audit request has 50 or more patients.	Send the packet to the Non-Ciox Chart Review Portal – see the Appendix of this job aid for how to use the Portal.
The audit request has less than 50 patients.	Follow your standard process for submitting the request to central intake for logging.

Sites that do not send requests to Central Intake for logging:

If ...	Then ...
The audit request has 15 or more patients.	Send the packet to the Non-Ciox Chart Review Portal – see the Appendix of this job aid for how to use the Portal.
The audit request has less than 15 patients.	Follow your standard process for logging the request - see the Logging a Request: Pull List section of this job aid for how to log a pull-list request.

Important Notes

When PAYI requests are submitted to the portal and pushed to fulfillment, they do not go through the standard “logging” process.

- When they are pushed to your site they will show in fulfillment status.
- If you use Central Intake, do not resubmit these requests to logging for questions/changes as this will cause unnecessary delays. The Central Intake team did not log these requests and will have no further information about them to help you process.

Continued on next page

Getting Help

Send any questions about packets submitted to this portal or general questions about the portal to CRSupport@CIOXHealth.com.

If submitting questions specific to a packet load, please include:

- Site Number
- Requester
- ROI Request Package number if known. This number can be found in the confirmation email you received when you submitted the request to the portal:

  ROI Request Package #1538588335583 Submitted

Processing HEDIS requests in HealthSource

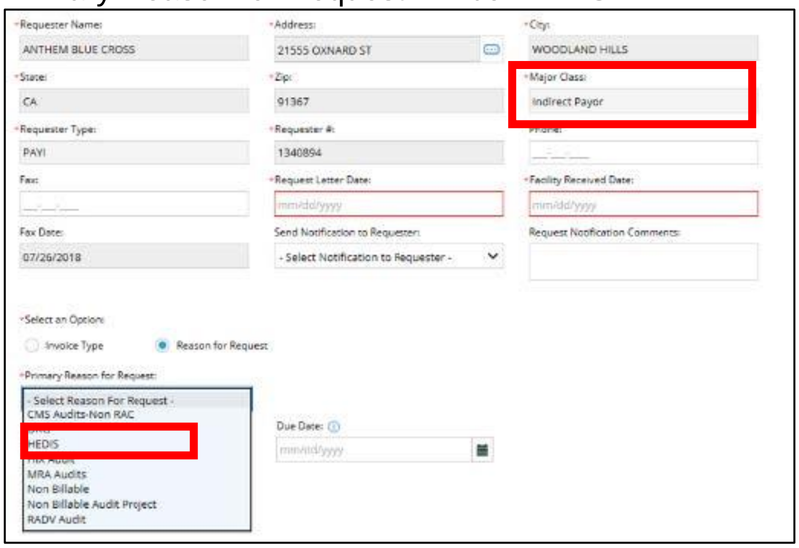
Introduction

This section contains helpful information for logging HEDIS requests in HealthSource.

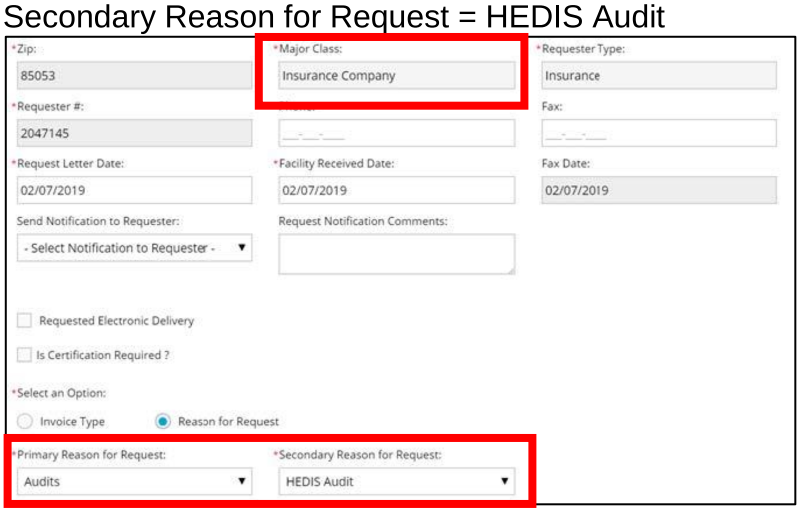
Selecting the correct Reason for Request

When logging a HEDIS request, there are 2 options for selecting HEDIS as the reason for request, depending on the Major Class of the requester selected:

Option 1: Major Class = Indirect Payor:
Primary Reason for Request will be HEDIS



Option 2: Major Class = Insurance Company:
Primary Reason for Request = Audits
Secondary Reason for Request = HEDIS Audit



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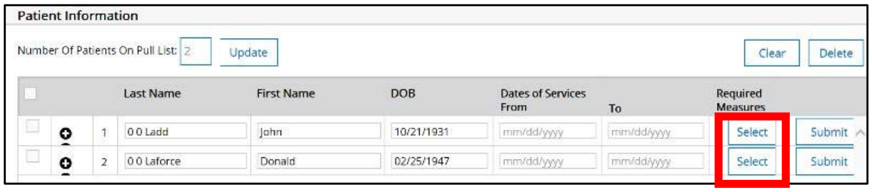
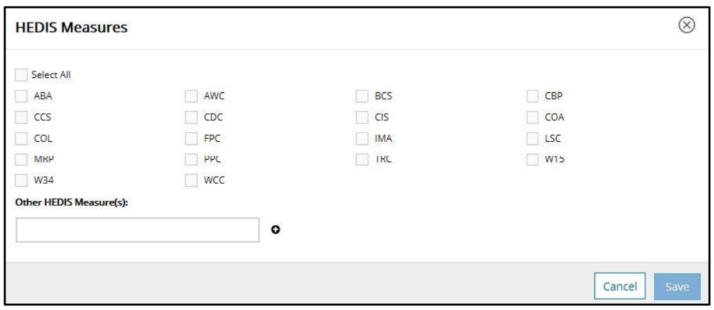
Selecting HEDIS Measures

There is a new Required Measures column on the Patient Information screen. To complete the section for each patient, click Select:

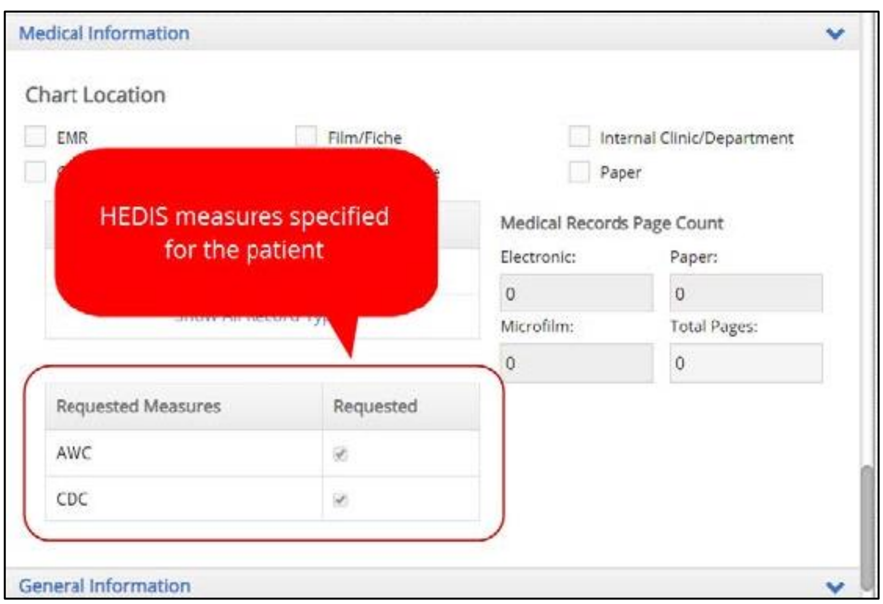


Click the appropriate box for each measure, or if there is not a checkbox for a measure, type the measure in the Other HEDIS Measure field. When finished click Save:



Viewing Measures in Fulfillment

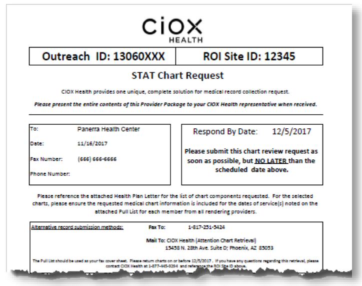
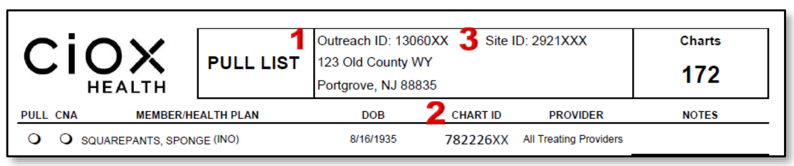
The Medical Information section lists the HEDIS measures that were specified on the Patient Information screen:



Importing PAYD Requests into HealthSource

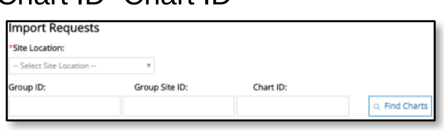
Provider Package

Ciox Phoenix sends medical record requests to HealthSource sites in a document set called a Provider Package, also known as a Ciox Phoenix Pull List. It typically consists of three parts:

Part	Description
Instruction Sheet	Identifies the requests as coming from Ciox Phoenix. 
Payor Page	This page shows which insurance company contracted with Ciox Phoenix to retrieve the requested records.
Pull List	Includes the patient information needed and includes three values used to import these requests into HealthSource: 1. Outreach ID 2. Chart ID 3. Site ID 

How to Manually Load Ciox Phoenix Requests

Follow these steps:

Step	Action
1	From the **Menu**, click **Import Requests**.
2	The **Import Requests** screen appears.
3	On the **Provider Package** (**Ciox Phoenix Pull List**), locate these three ID numbers: Outreach ID, Site ID and Chart ID.
4	Select the Site Location from the drop down and then enter the three ID numbers from the **Import Requests** screen and click **Find Charts**. **Note**: Group ID=Outreach ID Group Site ID=Site ID Chart ID=Chart ID 

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Importing PAYD Requests into HealthSource, Continued

How to Manually Load Ciox Phoenix Requests, continued

Step	Action
5	Pending requests appear on the **Import Request** screen, without any **eRequest ID**.
6	Do the requests match the information in the **Provider Package**? <table><tr><th>If...</th><th>Then ...</th></tr><tr><td>Yes</td><td>Go to step 7.</td></tr><tr><td>No</td><td>Repeat the search. If there are still no requests found, contact 877-358-6939</td></tr></table>
7	Select all of the requests listed on the **Provider Package** using the checkboxes in the far-left column of the **Import Request** screen.
8	Click **Submit** at the bottom right corner of the **Import Request** screen.
9	HealthSource notifies you that the requests have been submitted.
10	The requests are logged “behind the scenes” without any more action on your part.
11	f you want to see the logged requests, run the search again after several minutes. You’ll see that HealthSource has assigned an **eRequest ID**.

Logging a Request: Pull List

Pull List Process

Follow these steps to log a Pull List request:

Step	Action
1	Select **Pull List** under *Request Type*.
2	If the requestor was not found and populated by the ADE, enter the name or address and zip code of the requester.
3	Select **Find Requester**. If the Requester is not found, select the **Create New Requester** button to send this request to the Corporate queue where it will be researched and added to the database. The request will then be returned to the logging queue with the correct requester selected.
4	Select the **Requester Type**.
5	Enter the **Request Letter Date** found on the request letter.
6	Enter the **Facility Received Date.**
7	Select the **Reason for Request.**
8	In the **General Information** section, complete any fields if necessary.
9	In the **Medical Information** section, select the requested **Record Types.**
10	Click **Continue**. Continue will only be available if all of the required fields have been completed.
11	The **Pull List Patient Information** screen appears (see next page).
12	Enter the number of patients on the pull list and click **Update**.
13	Enter the Last Name, First Name, DOB, and Dates of Service for every patient on the Pull List.
14	Click **Submit** for every patient.
15	When all have been submitted, click **Done**.

Each time you click Submit for a patient, an individual eRequest ID is created for that patient/requester. You do not have to “Submit” every patient on the pull list at the same time. It is possible to begin fulfilling some on the list after they have been created individually and then create the rest at a later time.

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Logging a Request: Pull List, Continued

Pull List Request ID Values

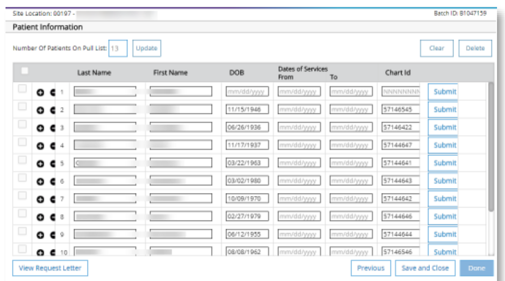
HealthSource tracks both the "parent" Pull List and all "children" requests covering specific patients.

Type	Batch ID	eRequest ID	Requester Type	Patient Name	Status
Pull List	Yes *	No	Yes	No	Logging Completed
Requests	No	Yes	Yes	Yes	Fulfillment Pending

The number in parenthesis after the Batch ID shows how many patient requests were part of the pull list. B1047159(13)

Pull List Patient Information Screen

This screen appears when a Logger enters a manual Pull List. It is not used for any other Request Type and does not appear for a Fulfiller.



Field	Description
Number of Patients on Pull List	Enter the # of individual patients whose records were requested and click **Update**. One row is automatically added for every patient.
Clear	Removes patient information from the selected row(s).
Delete	Deletes selected row(s).
Patient Information Columns	All fields must be filled out for every patient.
Submit	You must Submit the data for each patient row separately.
Done	Click Done when you have submitted all patient rows.
Manually add/delete row	Add: Delete:

<u>Note:</u> Users processing pull lists will have full access into the original request letter. The original pull list will show after the cover sheet that HealthSource automatically creates for pull list children. The original pull list as well as the cover sheet that HealthSource automatically creates for pull list children is part of the request package sent to the requester.

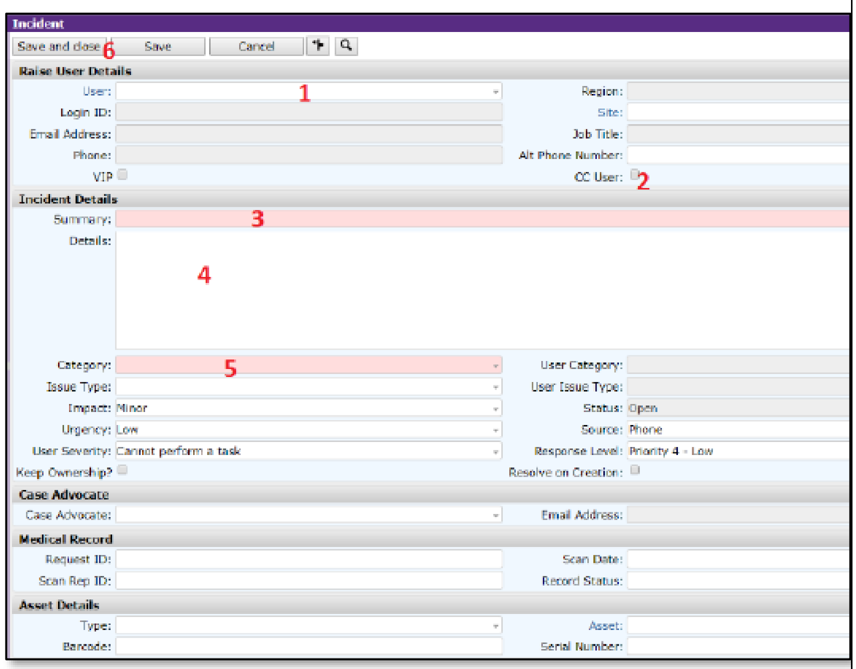
How to Submit Incident/Ticket for Embedded Support for CSR

Introduction

A ticket can be submitted for Embedded Support through LanDesk for CSR's (Ivanti).

Process

To submit a ticket, follow these steps:

Step	Action
1	Sign into Okta with your Ciox credentials. The **Landesk** "chicklet" is located on the Okta screen.
2	Upon selection, the Self-Service desk page or the Web Desk page will open. Select "Create Incident" or "New Incident" to begin creating a ticket.
3	Input information for each numbered section. 

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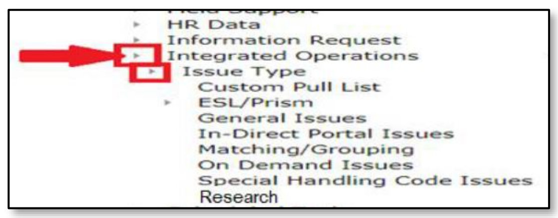
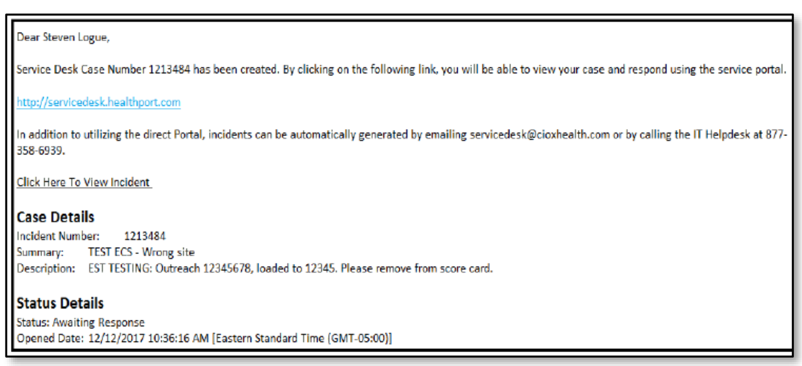
How to Submit Incident/Ticket for Embedded Support for CSR, Continued

Process, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3, cont</td><td>
<table>
<tr><th>#</th><th>Field</th><th>Description</th></tr>
<tr><td>1</td><td>User</td><td>the one who has the incident/request
(must have Ciox Health associated email)</td></tr>
<tr><td>2</td><td>CC User</td><td>CC users or additional people that you wish to be a part of this incident/ticket. (must have Ciox Health associated email)</td></tr>
<tr><td>3</td><td>Summary</td><td>Summary or the title of the incident/ticket, for precision please provide Outreach ID and ROI site ID that is having issue.</td></tr>
<tr><td>4</td><td>Details</td><td>Full descriptions, please provide additional information such as the problem, location and solution if available.</td></tr>
<tr><td>5</td><td>Category</td><td>Scroll to find Integrated Operations, and select the arrow, and select the next arrow for Issue Type and pick the sub category for the Incident/ticket to be worked on.

</td></tr>
<tr><td>5A</td><td>Issue Type</td><td>Some end users may have this highlighted, if not highlighted, disregard inputting anything, if highlighted please select SET UP.</td></tr>
<tr><td>6</td><td>Save and Close</td><td>Save and Close will create the ticket. Review all information is provided and correct with no PHI. HealthSource invoice, chart ID, Log IDs are acceptable. [Note: any updates regarding the incident/ticket process will be forwarded to the USER and CC USER.]</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>After submitting the incident/ticket, the USER will receive an email with the Service reference number and detailed ticket that was created.

Dear Steven Logue,
Service Desk Case Number 1213484 has been created. By clicking on the following link, you will be able to view your case and respond using the service portal.
http://servicedesk.healthport.com
In addition to utilizing the direct Portal, incidents can be automatically generated by emailing servicedesk@cioxhealth.com or by calling the IT Helpdesk at 877-358-6939.
Click Here To View Incident
Case Details
Incident Number: 1213484
Summary: TEST ECS - Wrong site
Description: EST TESTING: Outreach 12345678, loaded to 12345. Please remove from score card.
Status Details
Status: Awaiting Response
Opened Date: 12/12/2017 10:36:16 AM [Eastern Standard Time (GMT-05:00)]</td></tr>
</table>

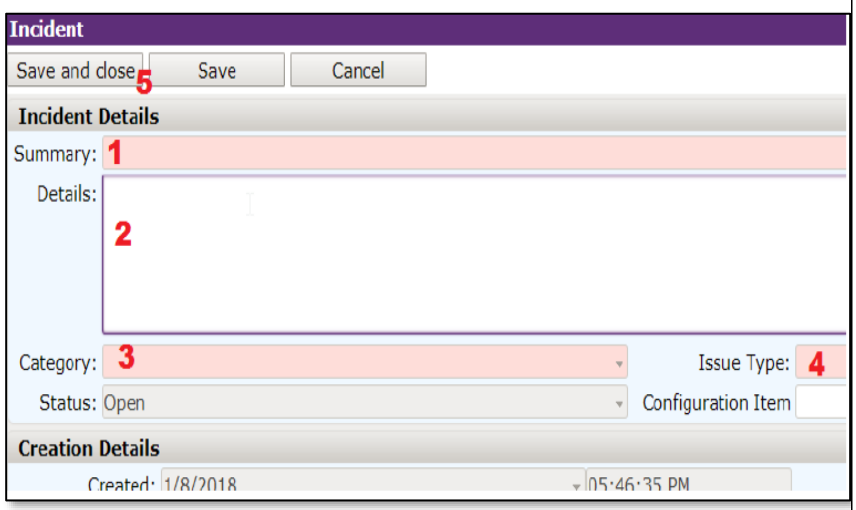
How to Submit Incident/Ticket for Embedded Support-Supervisor

Introduction

A ticket can be submitted for Embedded Support through LanDesk for Supervisors (Ivanti).

Process

To submit a ticket, follow these steps:

Step	Action
1	Sign into Okta with your Ciox credentials. The **Landesk** “chicklet” is located on the Okta screen. 
2	Upon selection, the Self-Service desk page or the Web Desk page will open. Select “Create Incident” or “New Incident” to begin creating a ticket.
3	Input information for each numbered section. 

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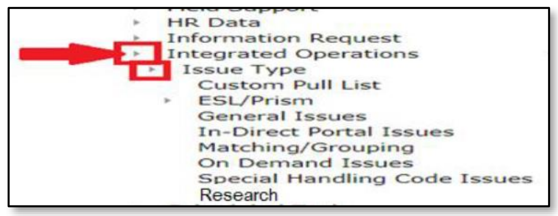
How to Submit Incident/Ticket for Embedded Support-Supervisor, Continued

Process, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3, cont</td><td>
<table>
<tr><th>#</th><th>Field</th><th>Description</th></tr>
<tr><td>1</td><td>Summary</td><td>Summary or the title of the incident/ticket, for precision please provide Outreach ID and ROI site ID that is having issue.</td></tr>
<tr><td>2</td><td>Details</td><td>Concise descriptions, please provide additional information such as the problem, location and solution if available.</td></tr>
<tr><td>3</td><td>Category</td><td>Scroll to find Integrated Operations, and select the arrow, and select the next arrow for Issue Type and pick the sub category for the Incident/ticket to be worked on.

</td></tr>
<tr><td>4</td><td>Issue Type</td><td>Some end users may have this highlighted, if not highlighted, disregard inputting anything, if highlighted please select SET UP.</td></tr>
<tr><td>5</td><td>Save and Close</td><td>Save and Close will create the ticket. Review all information is provided and correct with no PHI. HealthSource invoice, chart ID, Log IDs are acceptable. [Note: any updates regarding the incident/ticket process will be forwarded to the USER and CC USER.]</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>After submitting the incident/ticket, the USER will receive an email with the Service reference number and detailed ticket that was created.</td></tr>
</table>

Quick Start: Non-Ciox Chart Review Portal

Prior to Uploading

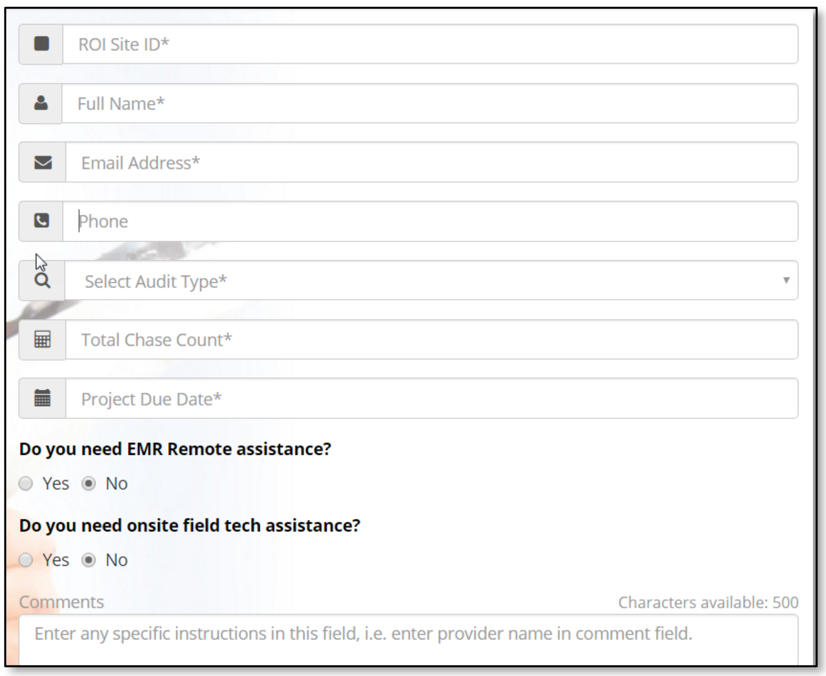
Ensure that the following items have already been satisfied:

a. Compliance or site approval.
b. Ensure the pull list request letter includes all requirements your site needs.
c. Any other items that you typically must have prior to scanning the work should be taken care of before uploading.

➢ Contact Support Team for questions/issues: CRSupport@CioxHealth.com

Process

Step	Action
1	Go to: https://cioxupload.com/roi
2	Fill out the form appropriately:



Field	Description
ROI Site ID	Verify your ROI Site ID and note that this is the site the chart review will be loaded to in the ROI software.
Full Name	This is your name, or whoever the Support team should communicate with for the audit, including who will receive the list once it's loaded.
Email Address	This should be for the person who the Support Team will speak with regarding the chart review.

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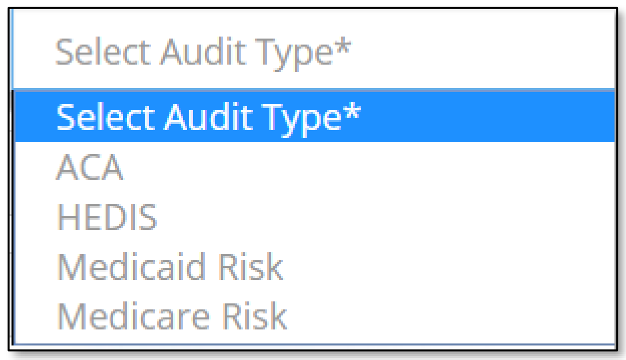
Process, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2, Cont</td><td>
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Phone</td><td>The main contact for the chart review. This number will be used for any questions associated with the chart review, as well as who the team will contact if you request remote access.</td></tr>
<tr><td>Select Audit Type</td><td>It’s important to identify the type of audit you are submitting. Choose the appropriate drop down that matches the audit.


</td></tr>
<tr><td>Chase Count</td><td>This is simply the number of patients on the pull list that you are submitting.</td></tr>
<tr><td>Project Due Date</td><td>During high volume times, requests for in-direct data entry are based on priority. The team will utilize the due date on the chart review to identify which requests should be managed first in order to offer plenty of time for the on-site team to process before the due dates. Ensure that you have this date correct when submitting.</td></tr>
<tr><td>Do You Need EMR Remote Assistance</td><td>If your site already has remote access set up for CIOX Chart Reviews, then we can utilize those same users to handle these non-CIOX audits for you! If your site does not have remote access set up, you can still request it here, and get the process started. Note: That requesting new access may take longer than there is time for the chart review.</td></tr>
</table>
</td></tr>
</table>

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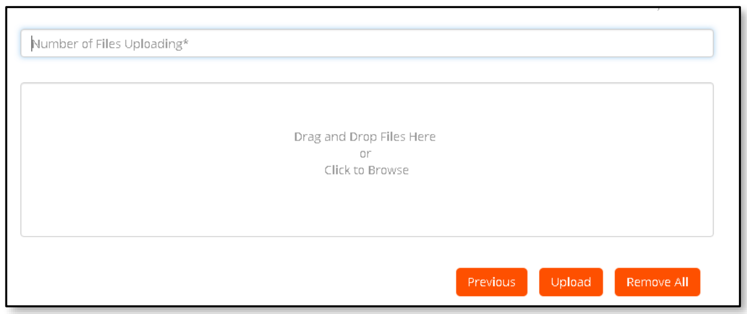
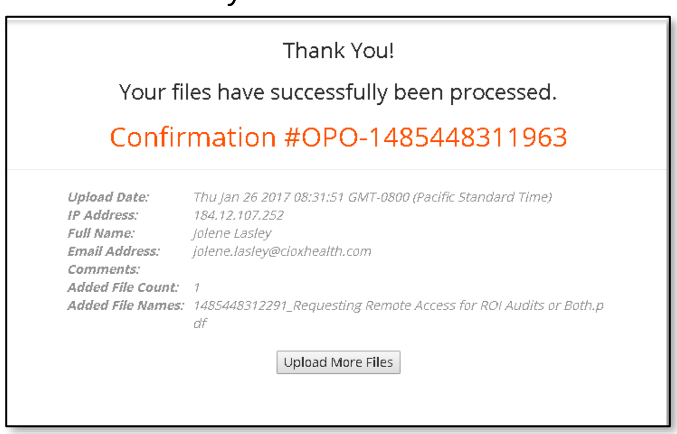
Process, continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2, Cont</td><td>
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Do You Need Onsite Field Tech Assistance</td><td>If you simply need some additional staff at the site to assist you to complete the audit, you can choose this option and the onsite resource team will contact you to set up a rep to come to your site and assist in processing the audit! The team will utilize the ROI Software just as your staff would do.</td></tr>
</table>
</td></tr>
<tr><td>3</td><td>Click “Next” once you’ve filled the form in completely.</td></tr>
<tr><td>4</td><td>Fill out fields:



<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Number of Files Uploading</td><td>Total number of files you will be adding.
Note: You can attach multiple files for a single chart review, but only include one chart review per submission</td></tr>
<tr><td>File Upload</td><td>Drag and drop the in any format you have available to you.</td></tr>
<tr><td>Click</td><td>Upload to submit</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>You will receive your confirmation number for the upload:



</td></tr>
<tr><td>6</td><td>You can then click “Upload More files” if you would lke to enter another chart review.</td></tr>
</table>