

# AWD

## **PowerQueueAWD Customer Service *Users Guide***

**<Client>**

## Document for Internal Use Only

This document will need to be updated for the client that will receive this document. This Users Guide was created from an MHC implementation so some areas will need to be updated for other Core system clients. Items that are highlighted in Red need to be either changed for the client or deleted before sending out to the client.

### Revision Control

Version	Date	Changes
1.0	3/15/08	Original document.

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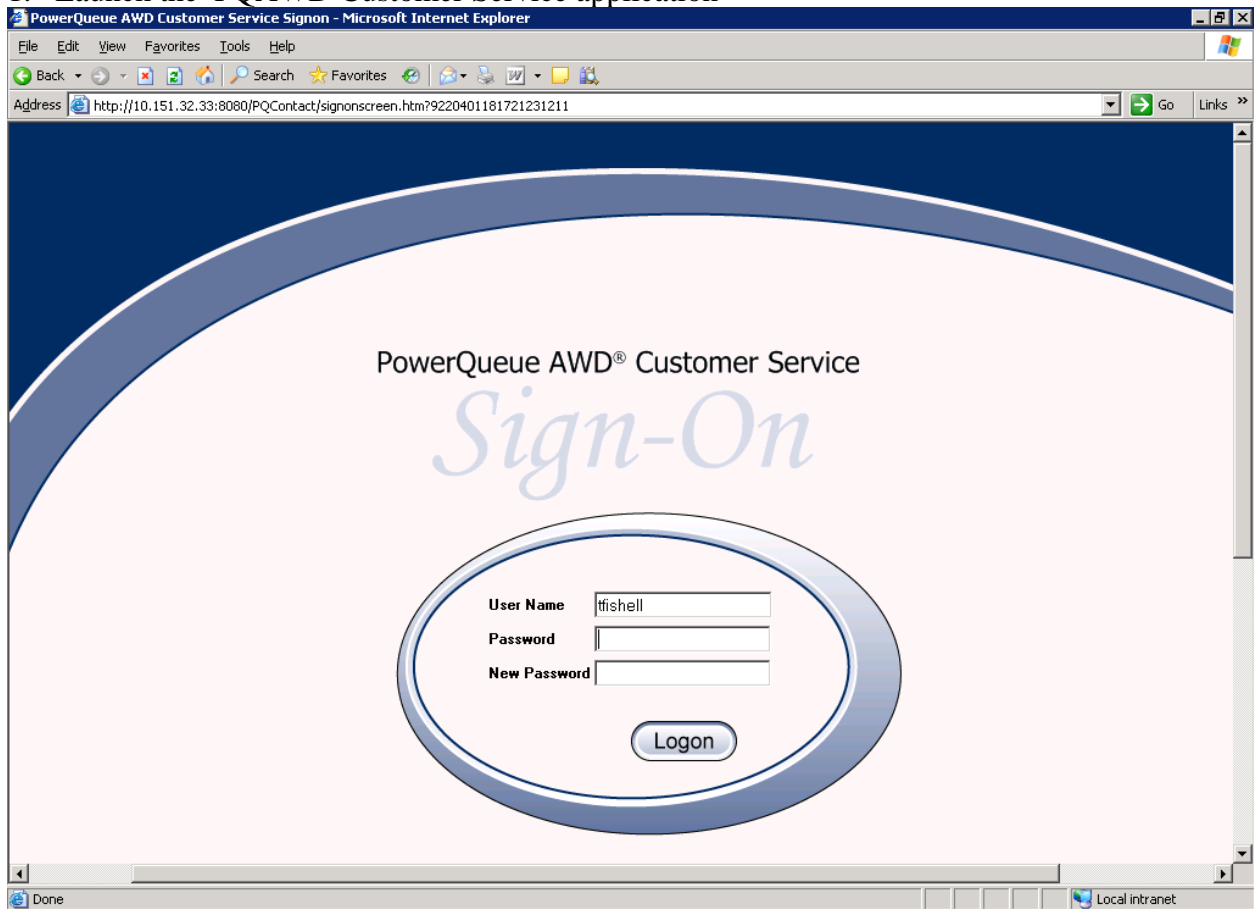
## **PowerQueue AWD Customer Service Overview**

PowerQueue AWD (PQAWD) Customer Service provides customized, call-tracking solutions that include standard call-center functionality. Using PQAWD Customer Service the user can resolve and log issues more efficiently because the user will have real-time access to claims system data.

PQAWD Customer Service allows you to categorize callers, who are referred to as "contacts." The categories include Member, Provider, Group and Other. Each category allows you to retrieve pertinent information about the caller from the system, while simultaneously logging detailed information about the current call.

## How to Log on:

### 1. Launch the PQAWD Customer Service application



2. Enter User Name
3. Enter Password
4. New Password **Keep Blank** – Unless you have to change your password then enter information into the New Password field.
5. Select Logon

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Note: The Password for PQAWD Customer Service is Case sensitive. The Password has to be at least 7 characters, can not have 3 consecutive characters form the user's user ID and needs to have at least three of the following criteria:

1. Upper Case
2. Lower Case
3. Number
4. Character (!; @; #; \$; %; &; \*; or ?0029

If the user does not enter the appropriate password then an error message is received.

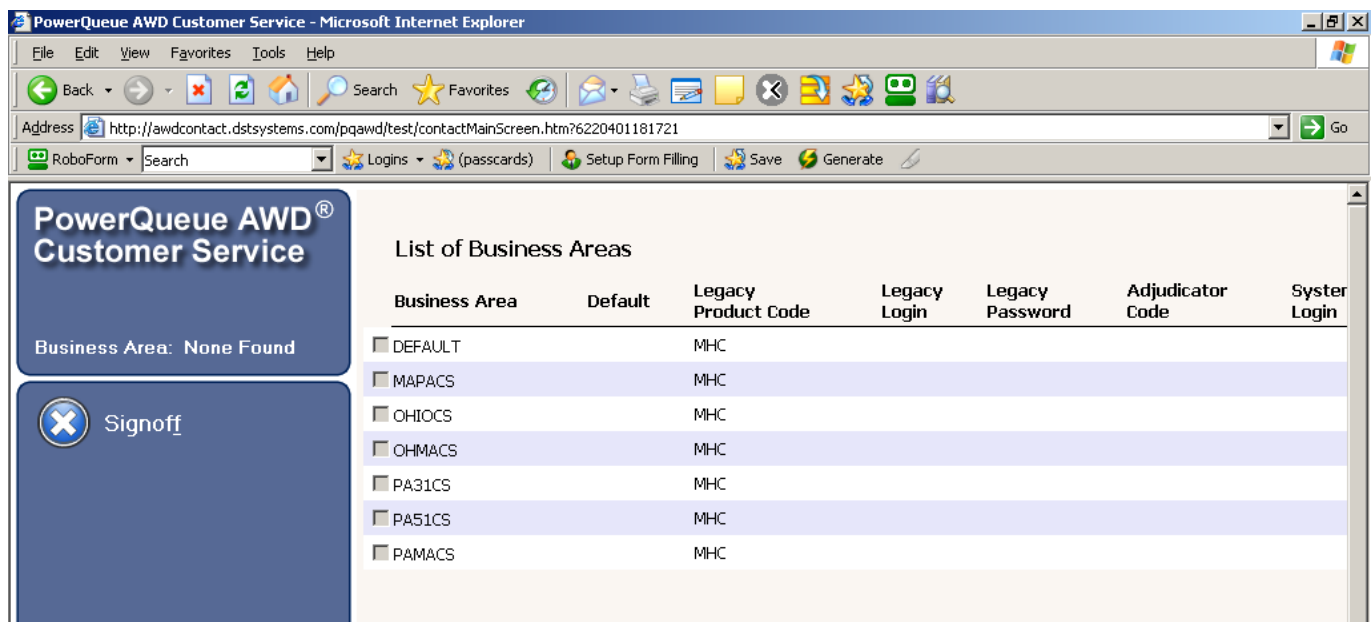
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## Setting up the Business Area:

This setup is needed required when you first log into PQAWD Customer Service this setting is necessary for each business area that is in your business area section. If a user does not at least have update authority (in AWD Admin) for a business area they will not be able to create issues in that business area and they will not be able to work issues in their inbox from that business area. **All roles have been created with all business areas as at least update only.**

When you initially log into PQAWD Customer Service your screen will look like the following:

Screen shot would look different for other Core system clients (i.e. Core Product Code will be different for each Core system) so update screen shot accordingly.



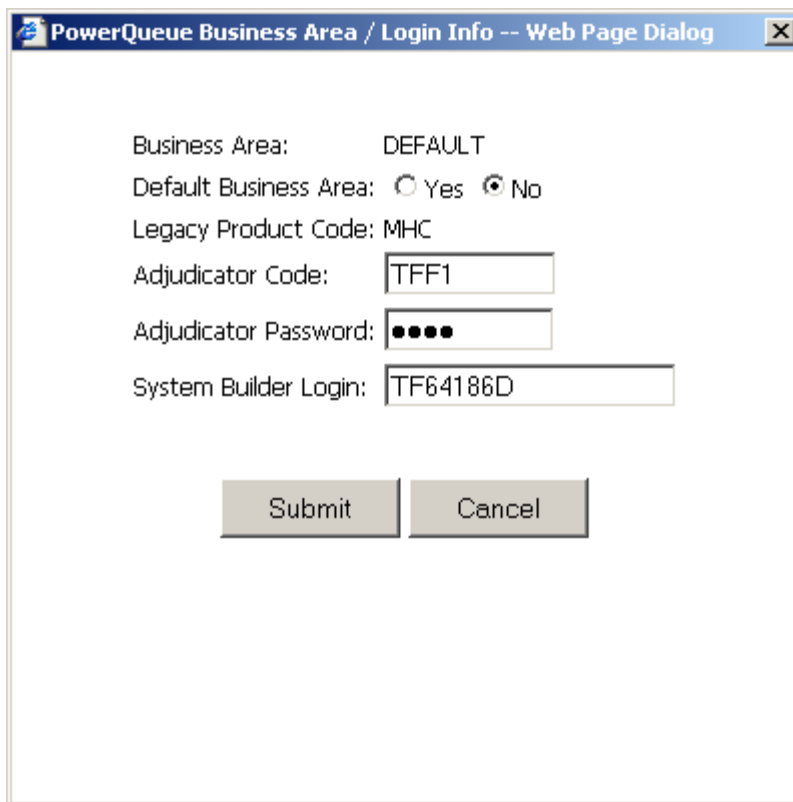
This setup will only have to happen one time except for the following two situations:

- A new business area is introduced into the workflow and setup for the user in AWD Admin
- The users password has been changed then it will need to be updated for each of the business areas setup on this screen

**MHC Log in ONLY: This section will need to be changed for other Core system clients**

When you first log into the PQAWD Customer Service you will have to set your business area(s).

1. Select the Business Areas button
2. Select Edit hyperlink to the right of the Business Area
3. Select Default Business Area: YES for the DEFAULT business Area ONLY (all other business areas will be set to NO)
4. Enter the User ID for Adjudicator Code (upper case)
5. Enter the Adjudicator Password (upper case)
6. Enter the User ID for System Builder (upper case)



The screenshot shows a web page dialog box titled "PowerQueue Business Area / Login Info -- Web Page Dialog". The dialog contains the following fields and controls:

- Business Area: DEFAULT
- Default Business Area:  Yes  No
- Legacy Product Code: MHC
- Adjudicator Code:
- Adjudicator Password:
- System Builder Login:
- Submit button
- Cancel button

---

**Note:** The above example is only for our MHC Core system. Our other Core systems will only have a Core ID and Core Password to enter.

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## Home Screen Options:

The following screen is what the representative will see when you logon to PQAWD Customer Service. This is considered the Home window, therefore when the Home button is selected the representative will be directed to this view.

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**Note:** Do not use the Back button on your browser window only use the back arrow PQAWD Customer Service offers on the left side tool bar (if applicable).

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## Business Areas button:

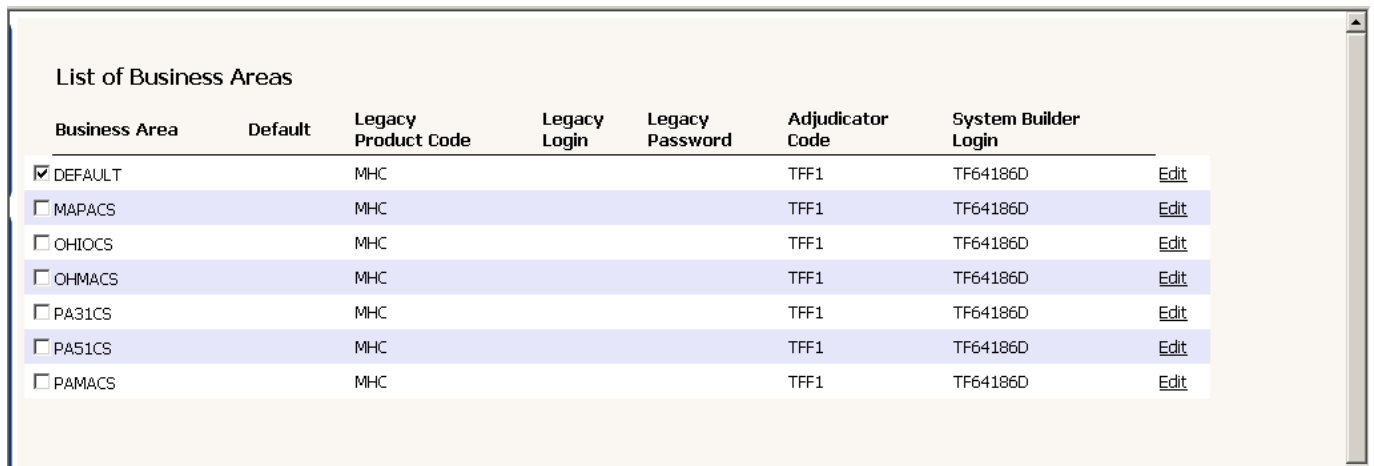
The Business Area button takes the user to the list of Business Areas the user is assigned. The Business Areas are setup in the AWD Administration option. Only the Business Areas set up as a part of the users privileges will be visible on this screen.

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**NOTE:**

This screen will only need to be set up one time for a user. If the User's password is change in the Core system then that password will need to be updated in this screen

---



Business Area	Default	Legacy Product Code	Legacy Login	Legacy Password	Adjudicator Code	System Builder Login	
<input checked="" type="checkbox"/> DEFAULT		MHC			TFF1	TF64186D	<a href="#">Edit</a>
<input type="checkbox"/> MAPACS		MHC			TFF1	TF64186D	<a href="#">Edit</a>
<input type="checkbox"/> OHIOCS		MHC			TFF1	TF64186D	<a href="#">Edit</a>
<input type="checkbox"/> OHMACS		MHC			TFF1	TF64186D	<a href="#">Edit</a>
<input type="checkbox"/> PA31CS		MHC			TFF1	TF64186D	<a href="#">Edit</a>
<input type="checkbox"/> PAS1CS		MHC			TFF1	TF64186D	<a href="#">Edit</a>
<input type="checkbox"/> PAMACS		MHC			TFF1	TF64186D	<a href="#">Edit</a>

## New Contact button:

The “New Contact” button is used by the User to enter a new issue into the PQAWD Customer Service Application.

## Member Contact

The Member Contact is where the Customer Service Representative will log issues received from a member.

The screenshot shows the 'PowerQueue AWD Customer Service' interface. On the left is a navigation menu with icons for Home, Business Areas, Help, and Signoff. The main area is titled 'Member Contact' and features a 'Select Contact Form:' dropdown menu set to 'Member'. Below this are several input fields for member information, including Member Number, Member Last Name, Member First, Member DOB, Member SSN, Member HICN Number, Recipient Number, Case Number, Subscriber Number, and Subscriber Last Name. A 'Search' button is located at the bottom right of the form area.

1. Select Member from the Select Contact Form drop down list
2. Enter any of the following search information
  - b. Member Number
  - c. Member last name
  - d. Member First name
  - e. Member DOB
  - f. Alternate ID
  - g. Member SSN
  - h. HICN Number
  - i. Recipient Number
  - j. Case Number
  - k. Subscriber Number

- l. Subscriber Last name
- m. Subscriber First name

3. Hit the Search button

If there are multiple members for the search criteria entered the following window will appear. If only one member is associated with the search criteria screen print under #4 will appear.

List of Members

Member Number Address Line Region	Member Name City	Date Of Birth State	Group Number Zip Code HICN Number	Effective Subscriber Number Recipient Number	Expiration Subscriber Name Case Number
30000060*01 123 MAIN STREET NORTH	SMITH, SAM DRYDEN	01/01/1972 MI	031LC*HHW 48428 MR011007001	01/01/2007 30000060 R30000060	SAM SMITH C30000060
30000061*01 123 MAIN STREET ADAMS COUNTY	SMITH, SAM DRYDEN	01/01/1972 MI	21*NHSP 48428 MR011007001	01/01/2007 30000061	SAM SMITH
30000081*01 123 MAIN STREET NORTH	SMITH, STAN DRYDEN	01/01/1972 MI	COMM*H 48428	01/01/2007 30000081	STAN SMITH
30000090*01 123 MAIN STREET NORTH	SMITH, STAN DRYDEN	01/01/1972 MI	COMM*H 48428	01/01/2007 30000090	STAN SMITH

4. On the List of Members screen, click on the member number that corresponds with the member for whom you are searching. The Member Verification screen will open.

**MEMBER Verification**

Member Number: 30000126*01	Group Number: 044AC*SSI3 HCSW	Effective: 01/01/2007
Member Name: LAILA SMITH	Date Of Birth: 10/01/2000	Expiration:
454545 GREEN STREET	PLYMOUTH, MI 48170	Region: WESTMORELAND COUNTY
Subscriber Number: 30000126	Subscriber Name: LAILA SMITH	HoH: BOB KITTEN

[Add New Contact](#)

List of Contacts

Contact Name	Relationship	Phone	Address	City, State Zip	Authorized
BOB KITTEN		(111) 555-5252	15555 CALIFORNIA ST	CANTON, MI 48188	No <a href="#">View</a>
LAILA SMITH		(555) 555-5555	454545 GREEN STREET	PLYMOUTH, MI 48170	Yes <a href="#">View</a>

5. On the Member Verification screen, review the information in the Member Verification and List of Contacts window to ensure that the contact is authorized to discuss the member.
6. On the List of Contacts window, the names of all previous contacts on behalf of the member will appear. Either Add New Contact (a) if the contact is not listed or Select the Contact (b).

a. Add new contact

- i. Select the Add new Contact button

The screenshot shows a web page dialog titled "Add New Contact -- Web Page Dialog". The form contains the following fields and controls:

- Contact Name:** A text input field followed by "Mbr AutoFill" and "HoH AutoFill" buttons.
- Contact Phone:** A text input field followed by an "Ext:" text input field.
- Relationship:** A dropdown menu.
- Alternate Phone:** A text input field followed by an "Ext:" text input field.
- Fax Number:** A text input field.
- Email:** A text input field.
- Address Line 1:** A text input field.
- Address Line 2:** A text input field.
- City:** A text input field.
- State:** A dropdown menu.
- Zip:** A text input field.
- Comments:** A large text area with a vertical scrollbar.
- Authorized:** A checkbox.
- Buttons:** "Save", "Delete", and "Cancel" buttons at the bottom.

- ii. Enter in all the contact information or select the Mbr AutoFill or HoH Autofill buttons
- iii. Check the authorized box – this indicates the contact is authorized to discuss the member. If the contact is not authorized they will be listed as a contact but there will be no hyperlink to take this contact to the next step.
- iv. Select save – this adds the contact’s information into the system and return to the List of Contacts window.

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Note: Changing the contacts address does not update The Core System with that address change.

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- b. Contact Already Exists: On the List of Contacts window, click on the View link next to the contact's name and demographic information to edit the contact information, if required. The Add New Contact window will appear with the contact's previously supplied information already populated in the fields. Edit as necessary and click the Save button to save your changes and return to the List of Contacts window.
  - i. Select the Contact's name to go to the Member Contact Form screen

**MEMBER Verification**

Member Number: 30000126*01	Group Number: 044AC*SSI3 HCSW	Effective: 01/01/2007
Member Name: LAILA SMITH 454545 GREEN STREET	Date Of Birth: 10/01/2000 PLYMOUTH, MI 48170	Expiration: Region: WESTMORELAND COUNTY
Subscriber Number: 30000126	Subscriber Name: LAILA SMITH	HoH: BOB KITTEN

---

**List of Contacts** Add New Contact

Contact Name	Relationship	Phone	Address	City, State Zip	Authorized
BOB KITTEN		(111) 555-5252	15555 CALIFORNIA ST	CANTON, MI 48188	No <a href="#">View</a>
<u>LAILA SMITH</u>		(555) 555-5555	454545 GREEN STREET	PLYMOUTH, MI 48170	Yes <a href="#">View</a>

## Member Contact Form

7. **Contact Form Tab** – this tab contains three additional sections: Issues form, issues, and contact history. Changes to the Contacts Form screen can be saved by clicking the “save” button in the middle left of the page. Multiple issues can be saved using the “Save” function and when the entire call is done then the user would select the “complete” button on the index to the left of the screen. If you do not click on this button, your entries will not be completely saved and sent to the workflow.

**Member Information**

Member Number: 30000126*01	Group Number: 044AC*SS13 HCSW	Effective: 01/01/2007
Member Name: LAILA SMITH 454545 GREEN STREET	Date Of Birth: 10/01/2000 PLYMOUTH, MI 48170	Expiration: Region: WESTMORELAND COUNTY
Subscriber Number: 30000126	Subscriber Name: LAILA SMITH	HoH: BOB KITTEN
Contact Name: LAILA SMITH	Contact Phone: (555) 555-5555	<a href="#">Edit</a>

**Contact Form** | Eligibility | Claims | Accumulators | Providers | Authorizations | Group

**Issue Form**

Subject: Select a subject...      Status: Select a status...

**Issue Category**

Select an Issue Category

<ul style="list-style-type: none"> <li>1. <a href="#">Prov Inquiry</a></li> <li>2. <a href="#">Prov Action</a></li> <li>3. <a href="#">MBR Inquiry</a></li> <li>4. <a href="#">MBR Action</a></li> <li>5. <a href="#">MBR Request</a></li> <li>6. <a href="#">MBR Dental Issue</a></li> <li>7. <a href="#">MBR Redirect Call</a></li> <li>8. <a href="#">MBR Appeals</a></li> <li>9. <a href="#">MBR Notification</a></li> <li>10. <a href="#">RX Dept Only</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Auth Or Referral Inq</li> <li><input type="checkbox"/> Claim Inquiry</li> <li><input type="checkbox"/> CCI ClaimCheck Inq</li> <li><input type="checkbox"/> CNF Inquiry</li> <li><input type="checkbox"/> UM Provider ID Inq</li> <li><input type="checkbox"/> TPL Inquiry</li> <li><input type="checkbox"/> Eligibility Inquiry</li> <li><input type="checkbox"/> Medical Benefit Inq</li> </ul>
--	---

**Comments**

Ready to add a new Issue for MEMBER-30000126\*01

Save
Cancel

**Issues**

Current Case/Issue(s) [Add Case](#)

- Case for MEMBER-30000126\*01
  - Issue - Adding ...

**Contact History**

Results (showing 10 of 11) [More](#) [+/-](#)

- Phone on 09/04/2008 at 08:06:27 - Tocallend
  - Issue on 09/04/2008 at 08:06:02 about Member Dental Provider Inquiry - Tocsmisc  
Issue ID:20080904-080602-TIFFANYF Mbr:30000126\*01 Prv:1010616
  - Issue on 09/04/2008 at 08:06:20 about Member Disenroll Request - Tocsmisc  
Issue ID:20080904-080620-TIFFANYF Mbr:30000126\*01 Prv:1010616
- Phone on 09/03/2008 at 14:42:28 - Tocallend
  - Issue on 09/03/2008 at 14:42:22 about Member PCP Inquiry - Tocsmisc  
Issue ID:20080903-144222-TIFFANYF Mbr:30000126\*01 Prv:1010616

## **Member Information**

The Member information section displays the member's information and will stay at the top of the screen as you move through the various tabs.

<b>Member Information</b>			
Member Number: 30000126*01	Group Number: 044AC*SSI3 HCSW	Effective: 01/01/2007	
Member Name: LAILA SMITH 454545 GREEN STREET	Date Of Birth: 10/01/2000 PLYMOUTH, MI 48170	Expiration:	Region: WESTMORELAND COUNTY
Subscriber Number: 30000126	Subscriber Name: LAILA SMITH	HoH: BOB KITTEN	
Contact Name: LAILA SMITH	Contact Phone: (555) 555-5555		<a href="#">Edit</a>

**Issue Form:** The issues form tab contains Subject and Status list boxes to let you easily indicate the nature of the contact and whether it is in a Created or Saved status.

- a. Select a Subject – the subjects are configurable
  - i. List includes:
    1. Provider
    2. Member
- b. Select a Status – the status are configurable
  - i. List includes:
    1. TOCSCREATE – creates the issue and sends item to workflow
    2. TOCSSAVE – saves to worklist as the issue is not ready to be sent to workflow

**Issue Category:** A list of configurable categories and sub-categories that give a brief explanation of the issue that was reported.

- c. Select an issue category & sub-category– click on an issue category from the displayed list of issue categories in the Issue Category box. A list of issue sub-categories check boxes associated with the selected issue category will appear. See “**PQAWD CS MBR-PRV-GRP-OTH Call Configuration vXX.xls**” that displays the entire list of Subjects, Categories and Subcategories.
  - i. Examples include:
    1. MBR Dental Issue
      - a. Dental Question Referral
      - b. Urgent Dental Request
      - c. Non Urgent Request Lead
      - d. Non Urgent Request No Lead
      - e. General Dental Issue



*Note: You may only choose 1 category and 1 subcategory*

Standard PQAWD Customer Service allows the user to choose more than one subcategory but choosing more than one will cause the issue to be routed based on the rule priority level and additional subcategory can not be reported on. If you were to choose more than 1 subcategory the issues will be routed to the CSMISC queue for member services to determine what happens to the issue.

**Comments:**

- d. Enter Comments – when you select a category and a subcategory this adds partial comments into the comments section to get you started. Enter free-form comments in the Comments field below the displayed information.
- e. Select the Save button under the comments box to SAVE your current issue.

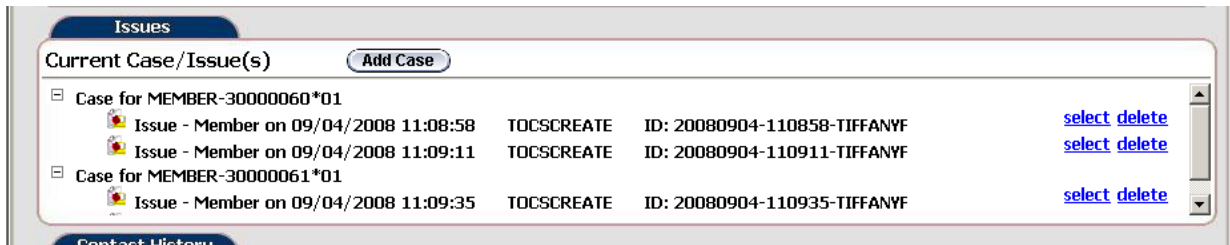
The screenshot shows the 'Issue Form' interface with the following elements:

- Navigation Tabs:** Contact Form, Eligibility, Claims, Accumulators, Providers, Authorizations, Group.
- Issue Form Header:** Subject: [Select a subject...], Status: [Select a status...]
- Issue Category Section:**
  - Select an Issue Category:**
    - 1. Prov Inquiry
    - 2. Prov Action
    - 3. MBR Inquiry
    - 4. MBR Action
    - 5. MBR Request
    - 6. MBR Dental Issue
    - 7. MBR Redirect Call
    - 8. MBR Appeals
    - 9. MBR Notification
    - 10. RX Dept Only
  - Subcategory List:**
    - Auth Or Referral Inq
    - Claim Inquiry
    - CCI ClaimCheck Inq
    - CNF Inquiry
    - UM Provider ID Inq
    - TPL Inquiry
    - Eligibility Inquiry
    - Medical Benefit Inq
- Comments Section:** A large text area for entering free-form comments.
- Buttons:** Save, Cancel.
- Footer:** Ready to add a new Issue for MEMBER-30000126\*01

**Issues:**

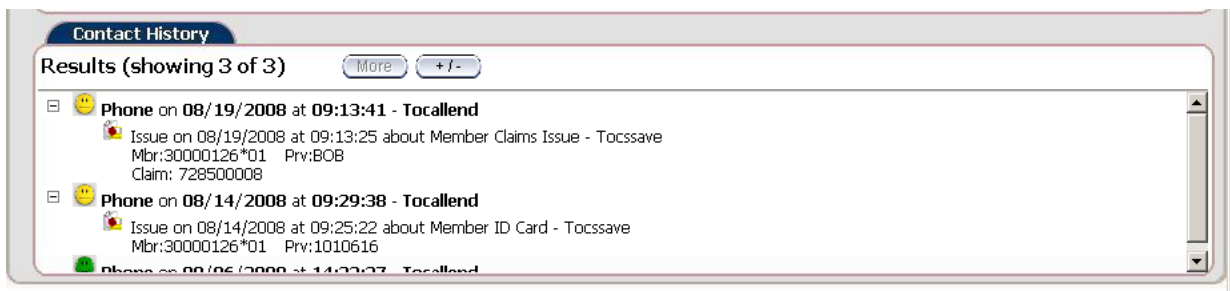
- f. Current Case/Issue(s) – this section shows the case/issues that are open for this particular Contact.
  - i. You can also add another case for one contact. Select Add case and it will take you back to the initial search for member/provider/group/other.
  - ii. Examples of when to add a new case would be when a Mother is calling about herself and her child. One case would be for the mother and another case would be for the child. This section also allows the user to use the select and delete option before the user has completed the call.

Note: The only way to receive the Issue ID is to save the issue before you complete the issue



**Contact History:** provides an at-a-glance view of all previous exchanges with the contact, including contact’s identification information, the subject(s) previously discussed and the current status of the issue(s). Once you select a contact history you are able to add comments to that issue but you will not be able to reopen issue if it is in the END queue or route an open issue to another queue..

- g. Contact history shows all the various case/issues that were logged for this Contact



- 8. Related To** - this tab will display the related member, provider, group, claim, and authorization information. These fields can change depending on which claim or authorization has been chosen during an issue creation. These fields display in the issue history window and is used for reporting purposes.

Member	<input type="text" value="30000126*01"/>	<input type="button" value="Update"/>	Group	<input type="text" value="044AC*S"/>	<input type="button" value="Update"/>	Provider	<input type="text" value="BOB"/>	<input type="button" value="Update"/>
Claim	<input type="text" value="728500008"/>	<input type="button" value="Update"/>	Authorization	<input type="text"/>	<input type="button" value="Update"/>			
Claim DOS: 07/01/2006 to 07/01/2006			Auth DOS: 07/01/2006 to 07/01/2006					

Related to

## Core System Tabs:

The PowerQueue AWD Customer Service Mapping document will detail how the fields on each of the tabs below map back to the Core system. Some fields on the tabs below only get populated by certain Core systems. The Mapping document will define if a field is not being used by the specified Core system

**Eligibility Tab** – this tab shows the members eligibility according to what is set up in the core system. All this information is read only. Once you select this tab, additional tabs will become available. These include Summary, Additional Information, Provider, COB, Medicaid, and Medicare tabs.

- a. Summary tab under the Eligibility tab displays a summary of the members Eligibility. This tab displays the Benefit enrollment, PCP Information and Privacy Information.

**Summary**

Last Name: **Park** First: **John** Middle:   
 Address: **123 New Hyde Park** Status: **N**  
 Rel Code: **Self**  
 City: **Birmingham** Gender: **Male** DOB: **01/01/1962**  
 State: **AL** Home Phone: **205-437-1000** Fax Number:   
 Zip Code: **35242** Work Phone: **205-555-1234**  
 ID Card Request: **Yes** ID Card Counter: **1** COB Ind: **Yes**  
 LOB: **PPO Preferred Provider Organization**

Benefit Enrollment						
Effective	Expiration	Benefit PKG	Description	Tier Code	Description	
	Account #		LOB			
01/01/2000	99/99/9999	AAAA	AAAA Benefit Pkg	FMLY	Family Tier Code	
	123456		PPO	Preferred Prov Org		
01/01/2005	12/31/2005	BBBB	BBBB Benefit Pkg	SNGL	Single Tier Code	
	XYZACCT		ABC	ABCDEFGHIJKPPh		
01/01/2004	12/31/2004	CCCC	CCCC Benefit Pkg	SNGL	Single Tier Code	
	XYZACCT		ABC	ABCDEFPPPP		

PCP Information					
Effective	Expiration	PCP Number	Name	PCP Org	Name
01/01/2000	99/99/9999	2010001	Nancy Beeman	ORG1	ABCD Organization
01/01/2005	12/31/2005	2010002	Gerald Fishburne	ORG2	HHHH Organization
01/01/2004	12/31/2004	2010005	Caleb McCloud	ORG3	AAAA Organization

Privacy Information			
Verified Date:	<b>02/15/2000</b>	Verified By:	<b>Nancy Smith</b>
Verified?	<b>Verified</b>	Received by Writing:	<b>Y</b>

- b. Additional Info tab under the Eligibility tab displays any additional information for the member's eligibility. There are personal representative comments, pre-existing information and Languages.

**Related to**

Contact Form **Eligibility** Claims Accumulators Providers Authorizations Group

Summary **Additional Info** Provider COB Medicaid Medicare

Creditable Coverage Date: 01/01/2006

**Subscriber Information**

Subscriber Effective Date: 01/01/04  
 Subscriber Address: 123 Main St

Subscriber City, State Zip: Birmingham, AL 35242  
 Subscriber Home Phone: (205) 555-1234      Subscriber Work Phone: (205) 545-3333

**Personal Representative Comments**

This is an example of a personal representative comment  
 Another example of a personal representative comment  
 Another example of a personal representative comment  
 Another exmple of a personal representative comment

**Pre-Existing**

Diagnosis Range	Letter Waive
250.3 TO 250.9	Y
250.3 TO 250.9	N
250.3 TO 250.9	Y

**Languages**

English  
 French  
 German

- c. Provider tab under the Eligibility tab displays the Secondary PCP, Non-PCP Provider and Fee Scheduled Override information for the member

**Secondary PCP Information**

Effective	Expiration	PCP Number	Name	PCP Org	Name
01/01/2006	99/99/9999	2010007	Joshua Health	AAAA	AAAA Organization Name
01/01/2005	12/31/2005	2010005	Caleb McCloud	YYYY	YYYY Organization Name
01/01/2004	12/31/2004	2010001	Nancy Beeman	XXXX	XXXX Organization Name
01/01/2003	12/31/2003	2010002	Gerald Fishburne	CCCC	CCCC Organization Name

**Non-PCP Provider**

Benefit Category	Description	Non-PCP Provider
XYZ	XYZ Category	ABCD
AAA	AAA Category	1111
BBB	BBB Category	2222
CCC	CCC Category	3333
DDD	DDD Category	4444
XYZ	XYZ Category	5555
777	777 Category	6666

**Fee Schedule Override**

Effective	Expiration	Fee Code	Description
01/01/2006	99/99/9999	RRR	RRR Fee Schedule
06/01/2005	12/31/2005	ABC	ABC Fee Schedule
01/01/2000	06/31/2005	XYZ	XYZ Fee Schedule

- d. COB tab under the Eligibility tab displays the member's coordination of benefits that have been added to the core system.

Is Health Plan Primary or Secondary? **Eligible**

Insurance Company		
Effective Date	Expiration Date	Priority
<input checked="" type="checkbox"/> 01/01/2006	99/99/9999	1
<input type="checkbox"/> 01/01/2005	12/31/2005	10
<input type="checkbox"/> 01/01/2004	12/31/2004	20

Policy Holder Member #: **71101**  
 Policy Holder Name: **John Park**  
 Ins Company: **89898989**  
 Description: **B Insurance**  
 Address: **101 12th Avenue South**  
**Suite 100**  
 City, State Zip: **Atlanta, GA 88888-9999**  
 Contact: **William Tack** Phone: **(405)123-1243**  
 Other Ins Member #: **23322222**  
 Other Ins Code: **BCBS** Other Ins #: **3434343**

- e. Medicaid tab under the Eligibility tab displays the members Medicaid information that has been setup in the core system

Case Number: **858585** Effective Date: **01/01/2007**  
 Case Worker Name:  
 Recipient Number: **585858**  
 Aid Code: **01 AFDC**  
 Alternate ID:  
 Date Received:  
 Relation:  
 Head of Household: **BOB KITTEN**  
 Address: **1555 CALIFORNIA ST**  
 City, State Zip: **CANTON, MI 48188**  
 Phone: **111/555-5252**  
 Language: **SPANISH**

- f. Medicare tab under the Eligibility tab displays the members Medicare information that has been setup in the core system

Related to

Contact Form **Eligibility** Claims Accumulators Providers Authorizations Group

Summary Additional info Provider COB Medicaid **Medicare**

Medicare Number: MRO11007001

Months of Prior Coverage:

Proposed HCFA Eff Date:

Proposed HCFA Group:

Effective Date		County		State	
01/01/2007		MACOMB		MI	

Effective Dates and Indicators

<p>Part A</p> <p>01/01/2007 Y</p>	<p>Part B</p> <p>01/01/2007 Y</p>	<p>Part C</p> <p>01/01/2007 Y</p>	<p>Part D</p> <p>01/01/2007 Y</p>
<p>ESRD</p> <p>01/01/2007 N</p>	<p>Welfare</p> <p>01/01/2007 Y</p>	<p>Instit/NHC</p> <p>01/01/2007 O</p>	<p>MTMP</p>
<p>Hospice</p> <p>01/01/2007 N</p>	<p>Working-Aged</p> <p>01/01/2007 N</p>	<p>Aged/Disabled</p>	<p>Pre Disabled</p>
<p>Medica Add-On</p>	<p>Transplant</p>		



9. **Claims Tab** – this tab shows the members claims according to what is in the core system. All this information is read only.

- a. Search section under the claims tab will allow you to search for a specific claim for that member. Use the search criteria and select the search button.

The screenshot shows a web application interface for the 'Claims' tab. At the top, there are navigation tabs: Contact Form, Eligibility, Claims (selected), Accumulators, Providers, Authorizations, and Group. Below this, there are sub-tabs: Search (selected), Summary, Claim Line(s), Comments, and Benefits. The search section contains several input fields: Claim Number, Alternate Claim Number, Beginning Date of Service (with a calendar icon), Ending Date of Service (with a calendar icon), Provider Number, Provider First Name, and Provider Last Name. A 'Search' button is located at the bottom right of the search section. Below the search section is a 'Search Results' table with the following data:

Claim Number	Provider Number-Name Alt Claim Number	Claim Status	Beginning DOS To Pay Amount	Ending DOS Total Charges
<a href="#">01-053105-003</a>	2010001	P	01/01/2005 \$200	01/01/2005 \$1000
<a href="#">01-072205-001</a>	2010005	P	06/25/2005 \$150	06/25/2005 \$500
<a href="#">01-103106-001</a>	2010002	P	10/31/2006 \$200	10/31/2006 \$500

- b. Summary tab – to display information on this tab you have to select a claim on the Search Tab and the claim information will display on this tab

Contact Form
Eligibility
Claims
Accumulators
Providers
Authorizations
Group

Search
Summary
Claim Line(s)
Comments
Benefits

Claim Number:	01-103106-001	Alt Claim Number:	12345
Authorization Number:	<u>45556788899</u>	Claim Status:	Closed
Beginning DOS:	10/31/2006	Ending DOS:	10/31/2006
Vendor:	01	Claim Form Type:	LT
Received Date:	11/15/2006	Adjudication Date:	12/12/2006
Diagnosis Code 1:	789.2	Diagnosis Code 2:	465
Diagnosis Code 3:	56	Diagnosis Code 4:	78
Provider:	<u>201001</u> Nancy Beeman	Benefit Package:	2222 Benefit Pkg Des

Total Claim Amounts			
Charged:	500.00	Deductible:	0.00
Allowed:	200.00	COInsurance:	0.00
Discount:	0.00	CoPay:	10.00
Withhold:	0.00	COB Savings:	0.00
		Patient Paid:	10.00
		To-pay:	200.00

Reason Information

Reason	Desc
1234	Desc 1234
1555	Desc 1555
1666	Desc 1666

Other Payer		
ID	Name	Paid Amount
245666	Compass	100.00
245667	Compass	100.00
245668	Compass	100.00

Check Number

- c. Claim Line(s) tab - this tab shows the detail for each line of the claim that was selected in the search tab. When you select a service line the information can change in the additional amount section of this screen.

Contact Form
Eligibility
Claims
Accumulators
Providers
Authorizations
Group

Search
Summary
Claim Line(s)
Comments
Benefits

Claim Number: **01-103106-001**      Alt Claim Number: **12345**

Claim Lines						
BegDate	EndDate	CPTCod		Units Covered	Charged Non Covered	Allowed To-Pay
SvcCod	Md Md Md Md					
<input checked="" type="checkbox"/>	10/31/2006	10/31/2006	99213	1	300.00	100.00
				1		100.00
<input type="checkbox"/>	10/31/2006	10/31/2006	99215	1	200.00	100.00
				1		100.00

**Reason Information**

Reason	Status	Type	EOP
AO Benefit Reduced	Pay	W	
BA Not Covered by Plan	Pay	W	
RR Auth Limit Exceeded	Pay	W	

**Additional Amounts**

Member Liability:	<b>10.00</b>	CoPay:		Deductible:	<b>0.00</b>	CoInsurance:	
Quantity Allowed:		Discount:	<b>0.00</b>	Withhold:	<b>0.00</b>	COB:	

Line Status:	<b>Paid</b>	Paid Date:	<b>12/20/2006</b>
Authorization #:	<b><u>45556788899</u></b>	Adjudication Date:	<b>12/15/2006</b>
Provider:	<b><u>2010001</u> Nancy Beeman</b>	Network Status:	
Provider Capacity:		Line Vendor:	<b>Family Practice Associates</b>
Fee Schedule:	<b>HMOP HMO Provider Fee</b>	Override Code:	<b>OR</b>
Place Of Service:	<b>11 In-Office</b>	EPSDT:	
Diagnosis:	<b>465</b>	Check Number:	<b>00234</b>

- d. Comments tab – this tab will display any comments that are attached to the claim that was selected in the search tab.

Claim Number: 01-103106-001      Alt Claim Number: 12345  
Authorization Number: 45556788899      Claim Status: P  
Beginning DOS: 01/01/2005      Ending DOS: 01/01/2005  
Vendor: 01 Demo Vendor Name      Claim Form Type: LT

Comments

Ajudicated claim to pay per authorization.

- e. Benefits tab – under this tab you can select a claim line number to display the benefit information for that claim line.

Claim Line Number: 01

Claim Number: 01-103106-001      Alt Claim Number: 12345  
 Authorization Number: 45556788899      Claim Status: Closed  
 Beginning DOS: 10/31/2006      Ending DOS: 10/31/2006  
 Vendor: 01      Claim Form Type: LT

Benefit	Cov Unit	Cov \$	OOP \$	Coins \$	Copay \$	Deduct \$
Bene111 Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111
Bene222 Bene222	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111
Bene222 Bene222	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111
Bene222 Bene222	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111
Bene222 Bene222	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111

Benefit	Cov Unit	Cov \$	OOP \$	Coins \$	Copay \$	Deduct \$
MM111 MM111	MM111	MM111	MM111	MM111	MM111	MM111

Benefit	Cov Unit	Cov \$	OOP \$	Coins \$	Deduct \$
Grp1111 Grp1111	Grp1111	Grp1111	Grp1111	Grp1111	Grp1111

10. Accumulator Tab – this tab shows the members Accumulator information according to what is set up in the core system. All this information is read only.

- a. Search tab – allows you to search for a particular Benefit for that member in the core system

The screenshot displays a web application interface for the 'Accumulators' tab. At the top, there are navigation tabs: 'Contact Form', 'Eligibility', 'Claims', 'Accumulators' (selected), 'Providers', 'Authorizations', and 'Group'. Below these, there are sub-tabs for 'Search' and 'Summary'. The 'Search' section contains three input fields: 'Benefit:', 'Group:', and 'Accumulator Inquiry Date:' (with a calendar icon). A 'Search' button is located to the right of these fields. Below the search area, a 'Search Results' section contains a table with the following data:

Benefit	Description	Group	Description	Benefit Type
<a href="#">BASE</a>	Medical	GRP2	GRP 2 Desc	DEF
<a href="#">Exception</a>	Medical	GRP3	GRP 3 Desc	HIJ
<a href="#">MOV</a>	Medical	GRP	GRP Desc	ABC
<a href="#">Urgent Care</a>	Medical	GRP4	GRP 4 Desc	KLM

On the left side of the interface, there is a vertical label 'Related to'.

- b. Summary tab – for information to display you will have to select a benefit from the search tab.

Contact Form
Eligibility
Claims
Accumulators
Providers
Authorizations
Group

Search
Summary

Accumulator Inquiry Date: <b>01/01/2006</b>	Benefit: <b>BASE Commercial HMO</b>
Benefit Effective Date: <b>01/01/2006</b>	Benefit Expiration Date: <b>12/31/2007</b>
Member Effective Date: <b>01/01/2006</b>	Member Expiration Date: <b>12/31/2007</b>
Benefit Type: <b>HMO</b>	Enrollment Status: <b>Active</b>

Benefit Grouper

Grouper	Description	Type
GRP	GRP ABC	GRPT
GRP1	GRP 1 RFG	GRPT1
GRP2	GRP2 ELK	GRPT2

Single

Max Limits				
Accumed	Type	Exp DT	Limit	Claimed
MAX1	MAXT1	12/31/07	2000.00	50.00
MAX2	MAXT2	12/31/07	2000.00	50.00
MAX3	MAXT3	12/31/07	2000.00	50.00
MAX4	MAXT4	12/31/07	2000.00	50.00

Deductible			
Accumed	Type	Exp DT	Limit
DED	DEDT	12/31/07	500.00
DED1	DEDT1	12/31/07	500.00
DED2	DEDT2	12/31/07	500.00
DED3	DEDT3	12/31/07	500.00

CoInsurance		
Accumed	Type	Exp DT
COI	COIT	
COI1	COIT1	
COI2	COIT2	
COI3	COIT3	

Out Of Pocket		
Accumed	Exp DT	Limit

Cap Limit		
Accumed	Exp DT	Limit

Copay		
Accumed	Type	Exp DT

Family

Out Of Pocket		
Accumed	Exp DT	Limit

Deductible			
Accumed	Limit	Life Accumed	Life Limit

30

11. Provider Tab – this tab shows the members Provider information according to what is set up in the core system. All this information is read only.

a. Summary tab – this tab displays the members provider information

The screenshot displays a software interface for provider information. At the top, there are navigation tabs: Contact Form, Eligibility, Claims, Accumulators, **Providers**, Authorizations, and Group. Below these, there are sub-tabs: **Summary** and Contract. The main content area is divided into several sections:

- Provider Information:**
  - Provider Number: 1234
  - Work Phone: 205-437-5131
  - Contact: Joe Carter
  - Size: 99
  - Federal Tax ID: 123467899
  - Medicaid Number: 23554
  - NPI Number: 349875
  - Provider Name: [Blank]
  - Gender: Male
  - Panel: BIM Baptist Internal Medici
  - Size Limit: 99
  - DEA Number: 553246678
  - Medicare Number: 54678
  - UPIN: F3456
- Specialty Information:**
  - Specialty Code 1: S
  - Specialty Code 2: S
  - State License Number: 342122
  - Board Certified 1: Y
  - Board Certified 2: Y
  - State License Code: 435567
  - Specialty Type 1: S
  - Specialty Type 2: S
- Line-Of-Business Table:**

LOB	Description	Size	Limit	Maximum Age	Minimum Age	Accepting Patients
<input checked="" type="checkbox"/>	HMO	23	50		18	Y
<input type="checkbox"/>	HMO	23	50		18	Y
<input type="checkbox"/>	PPO	23	50		18	Y
- Associations Table:**

Effective	Expiration	Association	Description	Fee Schedule
12/23/2006	12/5/2006	6789		
12/23/2006	12/5/2006	6789		
12/23/2006	12/5/2006	6789		



- b. Contract tab – this tab displays the providers Line of Business, Region, Vendor Information and Pricing Information according to the effective/Expiration dates of service selected.

Provider Number: 123456      Provider Name: Harsh Mittal

**Line-Of-Business**

LOB	Description
<input checked="" type="checkbox"/> HMO	HMO
<input type="checkbox"/> 2	Clanton
<input type="checkbox"/> 5	Prattville

**Region**

Region	Description
<input checked="" type="checkbox"/> 1	Montgomery
<input type="checkbox"/> 2	Clanton

U&C Percentile: 25 250

Effective	Expiration	Active Status
<input checked="" type="checkbox"/> 01/01/2006	99/99/9999	Active
<input type="checkbox"/> 01/01/2005	99/99/9999	Active
<input type="checkbox"/> 01/01/2004	99/99/9999	Active

Capitation Vendor: N N

**Vendor Information**

Vendor	Name	Par/Non-Par	OverRide Capacity	Description
23	Southeast Family Practice	Y	N	

**Pricing Information**

Capacity	Speciality	Cap	N-Cap List	Base Table	OVRD Table	Disc Table	WTHD%
N	S	N	N	HMO1	23	45	25

12. Authorization Tab – this tab shows the members authorizations according to what is in the core system. All this information is read only.

- a. Search tab – this tab allows you to search for the members authorizations using specific search criteria.

**Search Results**

Authorization Number	Referring Provider Auth Type	Auth Status	Receiving Provider Effective Date	Expiration Date
<a href="#">0103150200101</a>	2610001 Michelle Famil Practice Medical	OPEN	2610003 09/01/2006	10/31/2006
<a href="#">0103150200102</a>	2610001 Michelle Family Practice Medical	Closed	2610003 10/10/2001	03/01/2006

- b. Summary tab – this tab will not display information unless you select an authorization from the search tab.

**Related to**

**Contact Form** | **Eligibility** | **Claims** | **Accumulators** | **Providers** | **Authorizations** | **Group**

**Search** | **Summary** | **Detail Line(s)** | **InPatient**

Authorization: **0103150200101**      Authorization Status: **Open**  
 Referring Provider: **2610001 Michelle Family**      Authorization Type: **ME**  
 Alternate Provider: **Community Hospital 1234**      Precert Status: **Approved**  
 Effective Date: **09/01/2006**      Actual Days: **7**  
 Expiration Date: **10/31/2006**      Approved Days: **10**  
 Line Of Business: **HMO HMO**      Total Certified Days: **7**  
 Claim Type: **MN Medically Necessary**  
 Place of Service: **21**  
 Liability:

**Service Providers**

- 2010001 Nancy Beeman
- 2010002 Gerald Fishburne
- 2010005 Caleb McCloud

**Diagnosis Information**

Principal Code:

- Code 1: 250.3 Diabetes with other coma
- Code 2: 250.4 Diabetes with renal manifestations
- Code 3:
- Code 4:
- Code 5:
- Code 6:
- Code 7:

**Claims**

Claim Number

- 10080100101
- 10080100117
- 10080100102
- 10080100103
- 10080100109
- 10080100110
- 10080100111

**Comments**

- Auth comment 1
- Auth comment 2
- Auth comment 3

- c. Detail Line(s) tab – shows the detail for each line of the claim selected in the search tab. select a different line number to show a different line of the claim

Authorization Line Number: 1 Authorization Number: 0103150200101

Service Class: **First First Class**  
 Service Code: **12444 Srv Code Description**  
 Beginning Date Of Service: **10/10/2001**  
 Ending Date Of Service: **01/01/2002**  
 Authorized Days: **6**  
 Authorized Quantity: **68**  
 Duration: **5**  
 Bed Type: **Bed Type Bed Type Desc**  
 Procedure Estimated Amount: **\$100**  
 Negotiated Amount: **\$99**

Place of Service		Approved	Actual
21	Inpatient Hospital	22	5
22	Outpatient Hospital	86	66
23	EMERGENCY ROOM HOSPITAL		
24	AMBULATORY SURGICAL CENTER		
26	MILITARY TREATMENT FACILITY		

- d. Inpatient tab – shows the Inpatient information for the claim that was requested in the search tab

Authorization Number: 0103150200101

Actual Admission Date: 08/25/06 Actual Discharge Date: 08/27/06

Actual Admission Type: **INP Inpatient**  
 Actual Discharge Type:

Admitting Diagnosis: **427.5 Cardiac arrest**  
 Discharged Diagnosis:

Estimated Admission Date: 8/25/06 Estimated Discharge Date: 8/27/06

Covered Days: 2 Non-Covered Days:  
 Acute Days: Non-Acute Days:  
 Pre-Operative Days Denied:

Bed Type: **HB Hold Bed**

13. Group Tab – this tab shows the members eligibility according to what is set up in the core system. All this information is read only.

a. Summary Tab – shows the summary information for the members group

The screenshot shows a software interface with a top navigation bar containing tabs: Contact Form, Eligibility, Claims, Accumulators, Providers, Authorizations, and Group. The 'Group' tab is selected. Below this is a sub-navigation bar with tabs: Summary, Account, Billing, and Contract. The 'Summary' sub-tab is active. On the left side of the main content area, there is a vertical label 'Related to'. The main content area displays the following information:

Fed Tax ID:	123456789		
Ext Group Number:	ED987654321		
HCFA Plan ID:	444444444		
Group Type:	G Group		
LOB:	PPO Preferred Provider Organization		
Market Segment:	Large Group	Parent Group:	654321 Big Group Parent
Market Representative:	Jim Smith	Age Cutoffs Stud/Dep/Ret:	21
Standard Industry Code:	V1234	Billing Type:	Monthly
Total # of Employees:	10,000	Company:	01
HIPAA Certificate Flag:	Yes	EPSDT:	Yes
Status:	Active		

Below the summary information, there are three sections separated by horizontal lines:

- Contact Information:**

Group Contact:	Phil Jackson	Email:	biggroup@mail.com
Phone Number:	(205)437-5200	Fax:	(205)437-5201
		800 Number:	(800)437-5200
- Claim Information:**

Payer ID:	987654		
Pricing Group:	345678	Big Group Pricing Group	Print EOB: Yes
Group to Group Utilization:	222222	Big Group Utilization Group	
Pre-Existing Condition - 1st Period:	3 months		
- Group Comments:**

This is a great employer group. This healthplan needs to pay special attention to this group and offer them a great renewal package. Keep this group's business.

b. Account Tab – shows the account information for the group the member is assigned

Contact Form
Eligibility
Claims
Accumulators
Providers
Authorizations
Group

Summary
Account
Billing
Contract

Accounts

Sel	Account# Address	Account Name	City	Status	Effective State	Expiration Zip
<input checked="" type="checkbox"/>	123456 123 Main Street	ABC Orthotics Corporation	Birmingham	Active	01/01/2006 Alabama	99/99/9999 35242
<input type="checkbox"/>	654321 123 Main Street	Smith's Hardware Inc.	Deirut	Active	01/01/2006 Michigan	99/99/9999 48434
<input type="checkbox"/>	123456 123 Main Street	ABC Orthotics Corporation	Birmingham	Active	01/01/2006 Alabama	99/99/9999 35242
<input type="checkbox"/>	654321	Smith's Hardware Inc.		Active	01/01/2006	99/99/9999

Contact Information

Contact 1/Phone: **John Smith** (205)437-5200      Address: **123 Main Street**  
 Contact 2/Phone: **Jack Walker** (205)437-5200      **Suite 19**  
 City, ST Zip: **Birmingham Alabama 12345**

Contract Information

Effective Date: **01/01/2006**    Benefit Eff Date: **01/01/2006**    Benefit Exp Date: **99/99/9999**  
 Expiration Date: **99/99/9999**    Credit Banking Eff Date: **01/01/2006**    Credit Banking Exp Date: **99/99/9999**  
 Credit Banking Withdrawal: **Yes**

Carryovers

Eff Date: **01/01/2006**

Coinsurance: <b>Yes</b>	Deductible: <b>Yes</b>	Out-Of-Pocket: <b>Yes</b>
Copay: <b>Yes</b>	Units: <b>Yes</b>	Coverage: <b>Yes</b>

- c. Billing Tab – shows the billing information for the member in regards to the members group

Billing			
	-Group Premium-	-Member Premium-	
Charge free amount up to day:	15	15	
Charge full amount up to day:	15	20	
Charge half amount up to day:	20	10	
Credit free amount up to day:	20	1	
Credit full amount up to day:	15	1	
Credit half amount up to day:	15	1	
<hr/>			
Premium Billing beginning day:	10	Start Premium Billing month:	10
Premium Billing beginning month:	6	Start Premium Billing year:	2006
Premium Billing mode:	Mh	Premium Billing Billed-thru Date:	06/01/2006
Premium Charge Retroactive Days:	30	Billing Cycle:	3
Premium Credit Retroactive Days:	30	Age Calculation Method:	10
Stop Premium Billing code/ Description:			
<hr/>			
Billing Flags			
Individual Billing:	Y		
Member Billing:	Y		
Secondary Billing:	Y		

- d. Contract Tab – shows the members contract information corresponding with the members group

**Contract**

Effective Date	Expiration Date
<input checked="" type="checkbox"/> 01/01/2006	99/99/9999
<input type="checkbox"/> 01/01/2011	99/99/9999
<input type="checkbox"/> 01/01/2011	99/99/9999

Benefit Plan/Description: **HMO HMO Plan**  
 Contract Number/Description: **123456 Big Group Contract**  
 Hold Code/Description: **01 Group is suspended**  
 Group to Group Utilization:

Benefit Eff Date: **01/01/2006**    Benefit Exp Date: **99/99/9999**    Default Prev Org: **PPO**  
 OOP by Salary Flag: **Y**    Deduct by Salary: **Y**    Fee Sch: **HMO1**  
 Probationary Days: **20**    Prem Billing Age Flag: **Y**

**Contract Carryovers**

Eff Date: **01/01/2006**  
 CoInsurance: **Y**    Deductible: **Y**    Out-Of-Pocket: **Y**    Coverage: **y**    Copay: **Y**    Units: **Y**

**Tier Code**

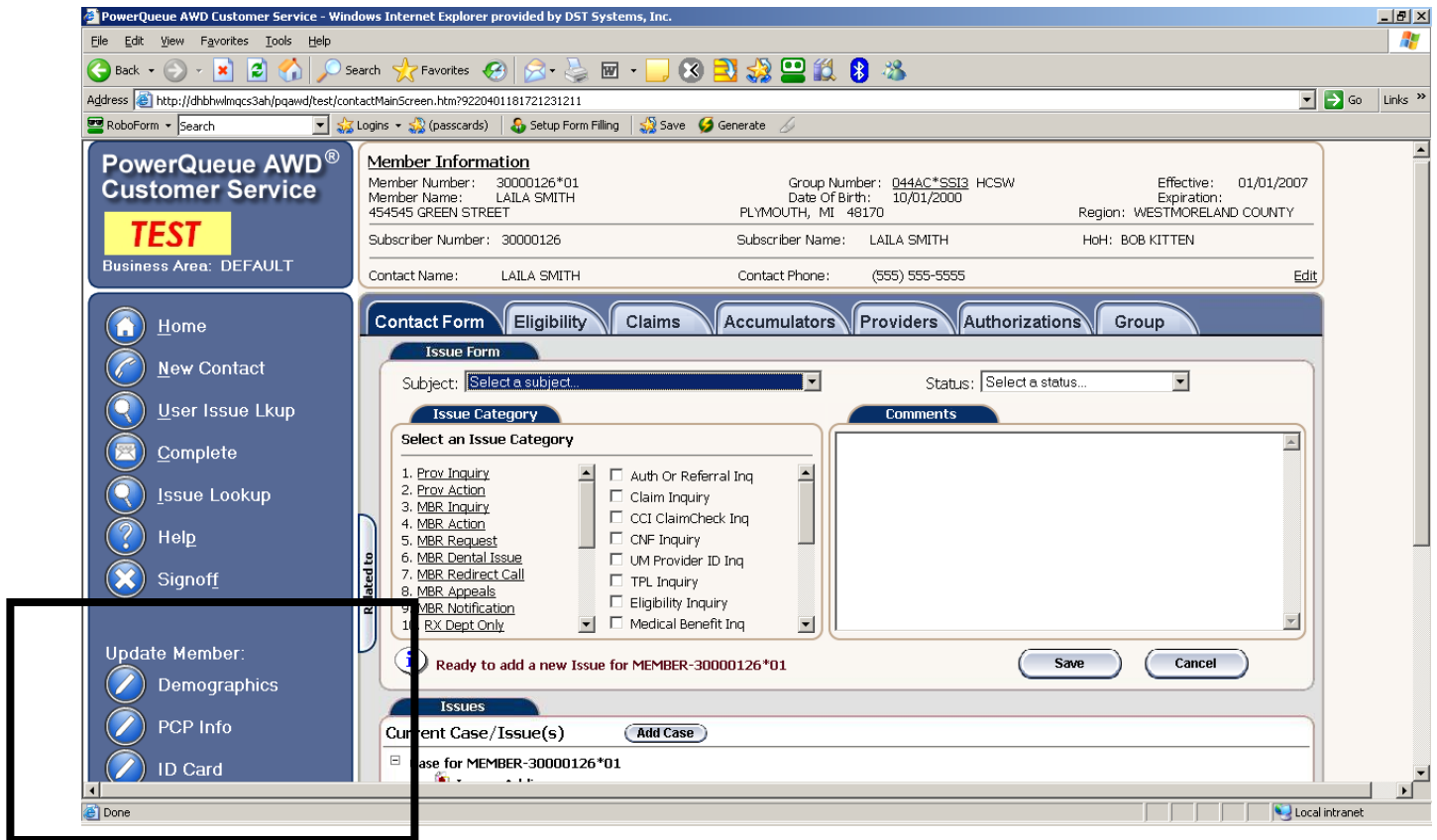
Tier Code	Description
<input checked="" type="checkbox"/> SNGL	Single Coverage
<input type="checkbox"/> FMLY	Multi Coverage

**Detailed Tier Information**

Dependent Minimum: **1**    Dependent Maximum: **21**    Dependent Age Limit: **21**  
 Other Dependent Minimum: **1**    Other Dependent Maximum: **21**    Other Dependent Age Limit: **21**  
 Student Age Minimum: **19**    Other Dependent Only Flag: **Y**    Spouse Coverage Flags: **Y**



14. Update Member – you are able to update member information by using the buttons on the left hand side of the member contract screen. These update options include Demographics, PCP information and ID Card.



- a. **Demographics** - allows the user to update the members demographic information from PQAWD to the Core system. The fields included in the update are as follows:
  - i. Last Name
  - ii. First Name
  - iii. Middle Name
  - iv. Status
  - v. Rel Code
  - vi. Gender
  - vii. Address
  - viii. City, State & Zip Code
  - ix. Home, Work and Fax Numbers

The screenshot shows a web page dialog box titled "Update Member - Demographics -- Web Page Dialog". The form contains the following fields and values:


Last Name:	SMITH	First:	LAILA
Status:	<input type="button" value="v"/>	Middle:	
Gender:	<input type="button" value="v"/>	Rel Code:	<input type="button" value="v"/>
Address:	454545 GREEN STREET		
City:	PLYMOUTH		
State:	MI <input type="button" value="v"/>	Zip Code:	48170
Work Phone:	<input type="text"/>	Home Phone:	<input type="text"/>
	<input type="text"/>	Fax Number:	<input type="text"/>

At the bottom of the dialog box, there are two buttons: "Submit" and "Cancel".

- b. **PCP Info** - allows the user to change the members PCP from PQAWD Customer Service to the Core system. The information displayed in the PCP Info window is the members current PCP.

Update Member - PCP Info -- Web Page Dialog

Effective Date: 01/01/2007      Expiration Date:

PCP Number:        Name: DOC MARTEN

PCP Organization Number:


---

Address:      Accepting Patients: Y

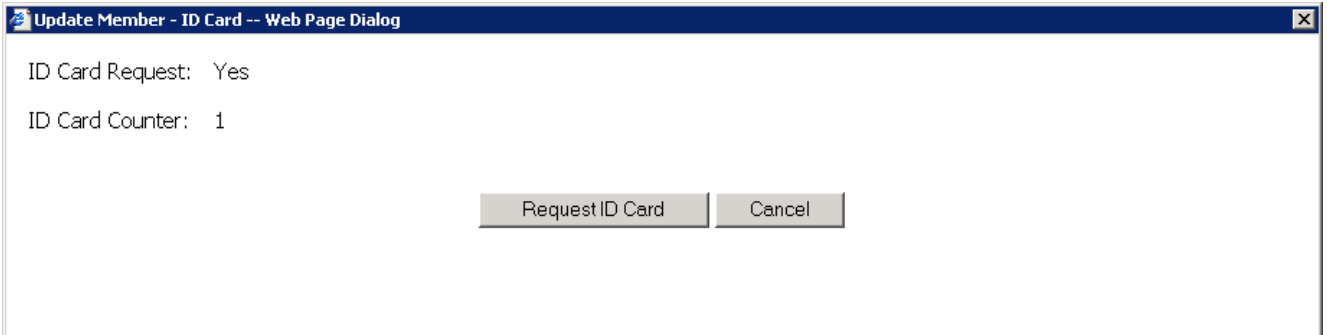
Phone Number:

Specialty Code: FP FAMILY PRACTICE      Provider Type:

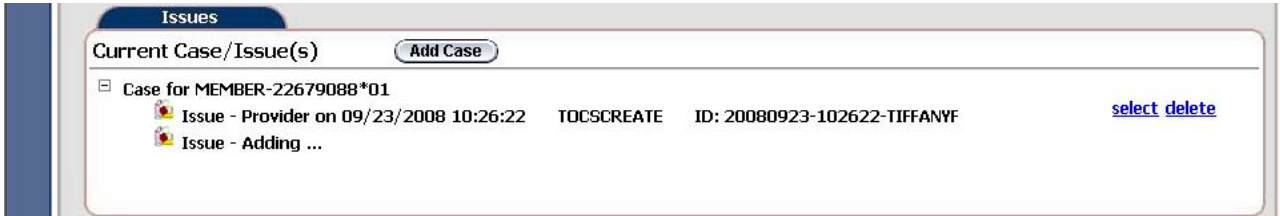
- i. Use the search button  next to the PCP Number to search the Core system for new PCP. A list of search criteria will display:
1. Provider Number
  2. Provider Last Name
  3. Provider First Name
  4. NPI Number
  5. Tax ID Number
  6. Speciality
  7. Zip Code
- ii. After entering the search criteria select Search
- iii. A list of providers will display select one of the provider to be the Members new PCP
- iv. The new PCP information will be displayed in the PCP Info window
- v. Hit Submit to finalize the changes.

- c. **ID card** – allows the user to request an ID card for the member from the Core system. Select the “Request ID Card” for the request to be processed in the Core System.



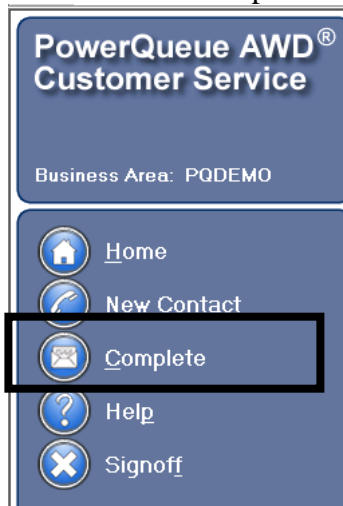
15. Saving each individual issue – make sure to save the issue before you complete the issue to receive your issue ID number

- a. Select SAVE – the issue will display under the Issues window. See screen shot below. At this point you are still able to Select the issue to modify and delete the issue.



16. Completing the Contact – once all the issues have been created for the call (contact) you will use the “Complete” button to end the entire call and send the issues through the work flow or save it to the user’s inbox. Once the “Complete” button has been used the issues are not able to be modified or deleted.

- a. Select the Complete button



- b. Once you save an issue the system automatically starts to create a new issue. Therefore, when you are ready to complete the call you will receive a message “Do you want to save current issue” :
  - i. Select No – if you have saved all your issues to the Issue window
  - ii. Select Yes – if you have not saved your current issue to the Issue window

- c. The following screen will display to select the Media type (examples: Phone, Fax & Email)
- d. Slide the Face from right to left to determine the contacts mood.

The screenshot shows a dialog box titled "Contact Survey -- Web Page Dialog". It contains two questions:

- "What Media was used for this Contact?" with a dropdown menu currently set to "Phone".
- "What was the overall mood of the contact?" with a slider control. The slider is positioned in the middle, and the text above it reads "Customer Satisfaction: Neutral". A yellow neutral face icon is positioned on the slider.

At the bottom of the dialog box, there are two buttons: "Finish" and "Cancel".

- e. Select the Finish button – you will then be in the work list page

## Provider Contact

The Provider Contact is where the Customer Service Representative will log issues received from a provider representative.

The screenshot displays the PowerQueue AWD Customer Service web application interface. On the left, there is a navigation menu with icons for Home, Business Areas, Help, and Signoff. The main content area features a form titled "Select Contact Form:" with a dropdown menu set to "Provider". Below this, there are seven input fields for search criteria: Provider Number, Provider Last Name, Provider First Name, NPI Number, Tax ID Number, Specialty, and Zip Code. A "Search" button is located at the bottom right of the form area. The browser's status bar at the bottom shows "Done" and "Local intranet".

1. Select Provider from the Select Contact Form drop down list
2. Enter any of the following search information
  - a. Provider Number
  - b. Provider Last Name
  - c. Provider First Name
  - d. NPI Number
  - e. Tax ID Number
  - f. Specialty
  - g. Zip Code

3. Hit the Search button

If there are multiple providers for the search criteria entered the following window will appear. If only one provider is associated with the search criteria screen print under #4 will appear.

List of Providers

Provider Number Address Line	Provider Name City	Tax ID Number State	NPI Zip Code	Specialty Phone Number	Provider Type Accepting Patients
<a href="#">1123001</a> 1600 St. Vincent Dr	Barns Jack Birmingham	Alabama	35401	ENT (205)555-3333	Specialist Yes
<a href="#">2010001</a> 3400 Medical Drive	Beman Nancy Birmingham	Alabama	35233	OB/GYN (205)555-4555	PCP Yes
<a href="#">2010002</a> 1600 Mtn Brook Way	Fishburne Gerald Birmingham	Alabama	35242	Internal Medicine (205)555-1234	Specialist Yes
<a href="#">897688</a> 234 Hosptial Dr	Hosptial Community Birmingham	Alabama	35242	Hospital (205)555-2334	Hospital Yes
<a href="#">1123099</a> 670 N 16th St.	Ingram Rick Birmingham	Alabama	35242	Pulmonary (205)555-4583	Specialist Yes
<a href="#">1123988</a> 344 Circle St	James Jim Birmingham	Alabama	35242	Family Practitce (205)555-3455	PCP Yes
<a href="#">2010008</a> 1500 Healthy Way	Johnson Crystal Birmingham	Alabama	35205	Peditrician (205)555-2345	PCP Yes
<a href="#">2010006</a> 444 Middle St.	Juarez Nicole Birmingham	Alabama	35233	Othorpedic (205)555-5677	PCP Yes
<a href="#">269001</a> 123 Oak Street	Latent Michelle Birmingham	Alabama	35242	Family Practice (205)437-4343	PCP Yes
<a href="#">2010005</a> 2300 Medical Drive	McCloud Caleb Birmingham	Alabama	35233	GYN (205)555-3477	PCP Yes
<a href="#">1123444</a> 4560 12th Street	Smith Hal Birmingham	Alabama	35422	Pediatrician (205)555-4566	PCP Yes
<a href="#">112389</a> 5664 36 St. N	Spain Mike Birmingham	Alabama	35242	Internal Medicine (205)555-4456	PCP Yes
<a href="#">123433</a>	Wright Sam			Family Practice	PCP

4. On the List of Providers screen, click on the provider number that corresponds with the provider for whom you are searching. The Provider Verification screen will open.

**PROVIDER Verification**

Provider Number: 1123001      Provider Name: Jack Barns      NPI: 35401  
 Phone Number: (205)555-3333      Fax Number: (205)555-9888      Accepting Patients: Yes  
 1600 St. Vincent Dr, Suite 202      Birmingham, Alabama

**List of Contacts** [Add New Contact](#)

Contact Name	Relationship	Phone	Address	City, State Zip	Authorized
Jack Barns	Attorney	(248) 948-3000			Yes <a href="#">View</a>



5. On the Provider Verification screen, review the information in the Provider Verification and List of Contacts windows to ensure that the caller is authorized to discuss the provider.
6. On the List of Contacts window, the names of all previous contacts on behalf of the provider will appear. Either Add New Contact (a) if the contact is not listed or Select the Contact (b).

a. Add new contact

- i. Select the Add new Contact button

The screenshot shows a web dialog box titled "Add New Contact -- Web Page Dialog". It contains the following fields and controls:

- Contact Name: [Text Input]
- Relationship: [Dropdown Menu]
- Contact Phone: [Text Input] Ext: [Text Input]
- Alternate Phone: [Text Input] Ext: [Text Input]
- Fax Number: [Text Input]
- Email: [Text Input]
- Address Line 1: [Text Input]
- Address Line 2: [Text Input]
- City: [Text Input] State: [Dropdown Menu] Zip: [Text Input]
- Comments: [Large Text Area]
- Authorized:
- Buttons: Save, Delete, Cancel

- ii. Enter in all the contact information
- iii. Check the Authorized box – this indicates the contact is authorized to discuss the provider. If the contact is not authorized they will be listed as a contact but there will be no hyperlink to take this contact to the next step.
- iv. Select save – this adds the contact’s information into the system and return to the List of Contacts window.

---

Note: Changing the contacts address does not update The Core System with that address change.

---

b. Contact Already Exists: On the List of Contacts window, click on the View link next to the contact's name and demographic information to edit the contact information, if required. The Add New Contact window will appear with the contact's previously supplied information already populated in the fields. Edit as necessary and click the Save button to save your changes and return to the List of Contacts window.

ii. Select the Contact's name to go to the Provider Contact Form screen

PROVIDER Verification						
Provider Number:	1123001	Provider Name:	Jack Barns	NPI:		
Phone Number:	(205)555-3333	Fax Number:	(205)555-9888	Accepting Patients:	Yes	
1600 St. Vincent Dr, Suite 202		Birmingham, Alabama		35401		

List of Contacts						<a href="#">Add New Contact</a>
Contact Name	Relationship	Phone	Address	City, State Zip	Authorized	
<a href="#">Jack Barns</a>	Attorney	(248) 948-3000			Yes	<a href="#">View</a>

## Provider Contact Form

7. **Contact Form Tab** – this tab contains three additional tabs: Issues form, issues, and contact history. Changes to the Contacts Form screen can be saved by clicking the “complete” button on the index to the left of the screen. If you do not click on this button, your entries will not be saved.

### Provider Information

The Provider information section displays the provider’s information and will stay at the top of the screen as you move through the various tabs.

**Provider Information**

Provider Number:	PCP1	Provider Name:	CASEY	NPI:	1001001001
Phone Number:	PRIMARY BUSINESS ADD	Fax Number:	SOUTHFIELD, MI 48034	Accepting Patients:	Y
Contact Name:	Lisa Madsen	Contact Phone:	(765) 888-8888	<a href="#">Edit</a>	

Contact Form
Providers
Eligibility
Claims
Accumulators
Authorizations
Group

**Issue Form**

Subject:

Status:

**Issue Category**

**Select an Issue Category**

<ul style="list-style-type: none"> <li>1. <a href="#">Providers</a></li> <li>2. <a href="#">Prov PQDM</a></li> <li>3. <a href="#">Prov Communication</a></li> <li>4. <a href="#">Prov Claims</a></li> <li>5. <a href="#">Sp Investigations</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Referral Form to PRV</li> <li><input type="checkbox"/> Demographic Chg Inquiry</li> <li><input type="checkbox"/> NPI Issue</li> <li><input type="checkbox"/> NPI Inquiry</li> <li><input type="checkbox"/> PRV Inquiry Credentialing</li> </ul>
---	---

**Comments**

Ready to add a new Issue for PROVIDER-PCP1

Save
Cancel

**Issues**

**Current Case/Issue(s)** Add Case

- Case for PROVIDER-PCP1
  - Issue - Adding ...

**Contact History**

**Results (showing 5 of 5)** More +/-

- Phone on 08/15/2008 at 11:26:57 - Tocallend
- Case for PROVIDER-PCP1
  - Phone on 08/13/2008 at 15:25:06 - Tocallend
  - Issue on 08/13/2008 at 15:25:03 about Providers Demographic Chg Inquiry - Tocssave  
Prv:PCP1
  - Phone on 08/13/2008 at 08:00:58 - Tocallend
  - Issue on 08/13/2008 at 08:00:58 about Providers NPI Issue - Tocssave  
Prv:PCP1

**Issue Form:** The issues form tab contains Subject and Status list boxes to let you easily indicate the nature of the contact and whether it is a Resolved, Open or Saved status.

- a. Select a Subject – the subjects are configurable for each client
  - iii. Examples include:
    3. Providers
- b. Select a Status – the status are configurable for each client
  - iv. Examples include:
    4. TOCSCREATE – sends the issue into the workflow
    5. TOCSSAVE – Saves the issue to your work list to be completed at another time (this issue is not in the workflow)

**Issue Category:** A list of configurable categories and sub-categories that give a brief explanation of the issue that was reported.

- h. Select an issue category and sub-category – click on an issue category from the displayed list of issue categories in the Issue Category box. A list of issue sub-category check boxes associated with the selected issue category will appear. See “**PQAWD CS MBR-PRV-GRP-OTH Call Configuration vXX.xls**” that displays the entire list of Subjects, Categories and Subcategories.

---

*Note:*

You may only choose 1 category and 1 subcategory

Standard PQAWD Customer Service allows the user to choose more than one subcategory but choosing more than one will cause the issue to be routed based on the rule priority level and additional subcategory can not be reported on. If you were to choose more than 1 subcategory the issues will be routed to the CSMISC queue for member services to determine what happens to the issue.

---

- i. Examples include:
  - 1. Providers
    - a. Referral Form to PRV
    - b. Demographic Chg Inquiry
    - c. NPI Issue
    - d. NPI Inquiry
    - e. PRV Inquiry Credentialing
  - 2. Prov Claims
    - a. Provider Reviews

**Comments:**

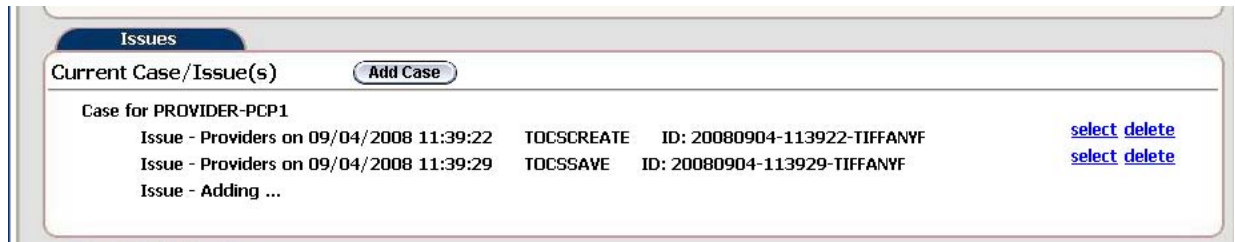
- c. Enter Comments – when you select a category and a subcategory this adds partial comments into the comments section to get you started. Enter free-form comments in the Comments field below the displayed information
- d. Select the Save button under the comments box to SAVE your current issue.

The screenshot displays the 'Issue Form' interface. At the top, there is a navigation bar with tabs for 'Contact Form', 'Providers', 'Eligibility', 'Claims', 'Accumulators', 'Authorizations', and 'Group'. Below this, the 'Issue Form' section is visible, featuring a 'Subject' dropdown menu and a 'Status' dropdown menu. The 'Issue Category' section is active, showing a list of categories with checkboxes: '1. Providers', '2. Prov PDOM', '3. Prov Communication', '4. Prov Claims', and '5. Sp Investigations'. Under 'Providers', there are sub-options: 'Referral Form to PRV', 'Demographic Chg Inquiry' (checked), 'NPI Issue', 'NPI Inquiry', and 'PRV Inquiry Credentialing'. To the right, the 'Comments' section contains a text area with the text 'Providers - Demographic Chg Inquiry'. At the bottom of the form, there are 'Save' and 'Cancel' buttons. A status bar at the bottom indicates 'Ready to add a new Issue for PROVIDER-N100'.

**Issues:**

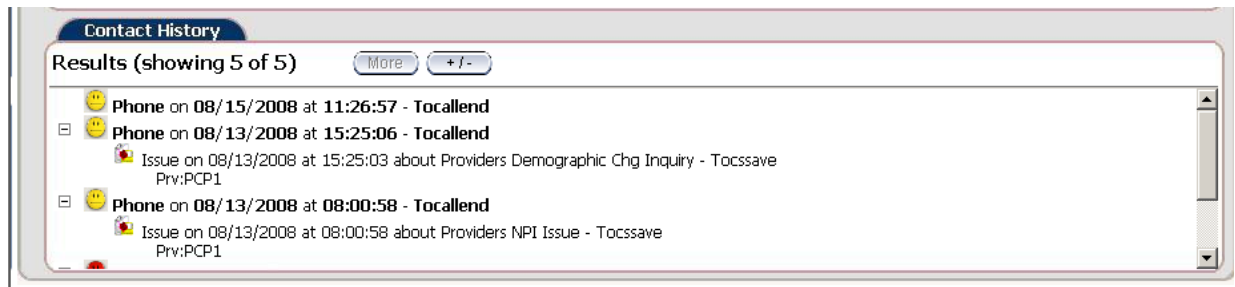
- e. Current Case/Issue(s) – this section shows the case/issues that are open for this particular contact. You can also add another case for one contact, just select Add case and it will take you back to the initial search for member/provider/group/other. This section also allows the user to select or delete issues they have started but have not completed.

Note: The only way to receive the Issue ID is to save the issue before you complete the issue



**Contact History:** provides an at-a-glance view of all previous exchanges with the contact, including contact’s identification information, the subject(s) previously discussed and the current status of the issues discussed. Once you select a contact history you are able to add comments to that issue but you will not be able to reopen issue if it is in the END queue or route an open issue to another queue..

- f. Contact history shows all the various case/issues that were logged for this Contact



- 8. **Related To** - this tab will display the related member, provider, group, claim, and authorization information. Depending on which claim or authorization has been chosen during a contact creation this information can change.

Member	<input type="text"/>	<input type="button" value="Update"/>	Group	<input type="text"/>	<input type="button" value="Update"/>	Provider	<input type="text" value="PCP1"/>	<input type="button" value="Update"/>
Claim	<input type="text"/>	<input type="button" value="Update"/>	Authorization	<input type="text"/>	<input type="button" value="Update"/>			
Claim DOS:			Auth DOS:					

Related to

9. **Provider Tab** - this tab shows the Provider information according to what is set up in the core system. All this information is read only.

a. Summary tab – this tab displays the provider information

**Summary**

Provider Number:	1234	Provider Name:	
Work Phone:	205-437-5131	Gender:	Male
Contact:	Joe Carter	Panel:	BIM Baptist Internal Medici
Size:	99	Size Limit:	99
Federal Tax ID:	123467899	DEA Number:	553246678
Medicaid Number:	23554	Medicare Number:	54678
NPI Number:	349875	UPIN:	F3456

Specialty Code 1:	S	Board Certified 1:	Y	Specialty Type 1:	S
Specialty Code 2:	S	Board Certified 2:	Y	Specialty Type 2:	S
State License Number:	342122	State License Code:	435567		

Line-Of-Business						
LOB	Description	Size	Limit	Maximum Age	Minimum Age	Accepting Patients
<input checked="" type="checkbox"/>	HMO	23	50		18	Y
<input type="checkbox"/>	HMO	23	50		18	Y
<input type="checkbox"/>	PPO	23	50		18	Y

Associations				
Effective	Expiration	Association	Description	Fee Schedule
12/23/2006	12/5/2006	6789		
12/23/2006	12/5/2006	6789		
12/23/2006	12/5/2006	6789		



- b. Contract tab – this tab displays the providers Line of Business, Region, Vendor Information and Pricing Information according to the effective/Expiration dates of service selected.

Contact Form
**Providers**
Eligibility
Claims
Accumulators
Authorizations
Group

Summary
**Contract**

Provider Number: **123456** Provider Name: **Harsh Mittal**

Line-Of-Business

LOB	Description
<input checked="" type="checkbox"/> HMO	HMO
<input type="checkbox"/> 2	Clanton
<input type="checkbox"/> 5	Prattville

Region

Region	Description
<input checked="" type="checkbox"/> 1	Montgomery
<input type="checkbox"/> 2	Clanton

U&C Percentile: 25 250

Effective	Expiration	Active Status
<input checked="" type="checkbox"/> 01/01/2006	99/99/9999	Active
<input type="checkbox"/> 01/01/2005	99/99/9999	Active
<input type="checkbox"/> 01/01/2004	99/99/9999	Active

Capitation Vendor: N N

Vendor Information

Vendor	Name	Par/Non-Par	OverRide Capacity	Description
<u>23</u>	Southeast Family Practice	Y	N	

Pricing Information

Capacity	Speciality	Cap	N-Cap List	Base Table	OVRD Table	Disc Table	WTHD%
N	S	N	N	HMO1	23	45	25

10. **Eligibility Tab** – this tab shows members eligibility according to what is set up in the core system. All this information is read only. Once you select this tab, additional tabs will become available. These include Member Search, Summary, Additional Information, Provider, COB, Medicaid, and Medicare tabs.

- a. Member Search tab under the Eligibility tab allows you to search for a member to display their eligibility information.

The screenshot shows a web application interface with a top navigation bar containing tabs: Contact Form, Providers, Eligibility (selected), Claims, Accumulators, Authorizations, and Group. Below this is a secondary navigation bar with tabs: Search (selected), Summary, Additional info, Provider, COB, Medicaid, and Medicare. The main content area contains search fields for Member Number, Member Last Name, Member DOB (with a calendar icon), Subscriber Number, and Subscriber Last Name. To the right, there are fields for First and Alternate ID, and another set of First and Alternate ID fields. A Search button is located at the bottom right. A vertical 'Related to' sidebar is on the left.

Once you enter member search information and hit the search button a list of members will display at the bottom of the above screen according to the search criteria entered.

Search Results					
Member Number	Member Name	Date Of Birth	Group Number	Effective	Expiration
Address Line	City	State	Zip Code	Subscriber Number	Subscriber Name
10014	Green, William	01/01/1971	100	01/01/2000	99/99/9999
20 Barclay	Utica	MI	48317	10014	William Green
01101	Jones, Frank	01/01/1967	MA001	01/01/2000	99/99/9999
123 Elm Street	Phoenix	AZ	02365	01101	Frank Jones
01104	Jones, Janice	03/06/1970	MA001	01/01/2000	99/99/9999
123 Elm Street	Phoenix	AZ	02365	01104	Janice Jones
01103	Jones, Jay	01/01/1999	MA001	01/01/2000	99/99/9999
123 Elm Street	Phoenix	AZ	02365	01103	Jay Jones
01102	Jones, Unborn	99/99/9999	MA001	99/99/9999	99/99/9999
123 Elm Street	Phoenix	AZ	02365	01102	Unborn Jones
71101-B	Park, John	01/01/1962	FHP001	01/01/2001	99/99/9999

- b. Summary tab under the Eligibility tab displays a summary of the searched members Eligibility. This tab displays the Benefit enrollment, PCP Information and Privacy Information.

Contact Form
**Eligibility**
Claims
Accumulators
Providers
Authorizations
Group

**Summary**
Additional info
Provider
COB
Medicaid
Medicare

Last Name: <b>Park</b>	First: <b>John</b>	Middle:
Address: <b>123 New Hyde Park</b>		Status: <b>N</b>
		Rel Code: <b>Self</b>
City: <b>Birmingham</b>	Gender: <b>Male</b>	DOB: <b>01/01/1962</b>
State: <b>AL</b>	Home Phone: <b>205-437-1000</b>	Fax Number:
Zip Code: <b>35242</b>	Work Phone: <b>205-555-1234</b>	
ID Card Request: <b>Yes</b>	ID Card Counter: <b>1</b>	COB Ind: <b>Yes</b>
LOB: <b>PPO Preferred Provider Organization</b>		

**Benefit Enrollment**

Effective	Expiration Account #	Benefit PKG	Description LOB	Tier Code Description	Description
01/01/2000	99/99/9999 123456	AAAA	AAAA Benefit Pkg PPO	FMLY Preferred Prov Org	Family Tier Code
01/01/2005	12/31/2005 XYZACCT	BBBB	BBBB Benefit Pkg ABC	SNGL ABCDEFGHIJKPPh	Single Tier Code
01/01/2004	12/31/2004 XYZACCT	CCCC	CCCC Benefit Pkg ABC	SNGL ABCDEFPPPP	Single Tier Code

**PCP Information**

Effective	Expiration	PCP Number	Name	PCP Org	Name
01/01/2000	99/99/9999	2010001	Nancy Beeman	ORG1	ABCD Organization
01/01/2005	12/31/2005	2010002	Gerald Fishburne	ORG2	HHHH Organization
01/01/2004	12/31/2004	2010005	Caleb McCloud	ORG3	AAAA Organization

**Privacy Information**

Verified Date: <b>02/15/2000</b>	Verified By: <b>Nancy Smith</b>
Verified? <b>Verified</b>	Received by Writing: <b>Y</b>

- c. Additional Info tab under the Eligibility tab displays any additional information for the selected member's eligibility. There are personal representative comments, pre-existing information and Languages.

The screenshot displays a web application interface with the following components:

- Navigation Tabs:** Contact Form, Eligibility (selected), Claims, Accumulators, Providers, Authorizations, Group.
- Sub-Section Tabs:** Summary, Additional Info (selected), Provider, COB, Medicaid, Medicare.
- Subscriber Information:**
  - Creditable Coverage Date: 01/01/2006
  - Subscriber Effective Date: 01/01/04
  - Subscriber Address: 123 Main St
  - Subscriber City, State Zip: Birmingham, AL 35242
  - Subscriber Home Phone: (205) 555-1234
  - Subscriber Work Phone: (205) 545-3333
- Personal Representative Comments:** A text area containing four example comments: "This is an example of a personal representative comment", "Another example of a personal representative comment", "Another example of a personal representative comment", and "Another exmple of a personal representative comment".
- Pre-Existing Table:**

Diagnosis Range	Letter Waive
250.3 TO 250.9	Y
250.3 TO 250.9	N
250.3 TO 250.9	Y
- Languages:** A list with three entries: English, French, and German.

- d. Provider tab under the Eligibility tab displays the Secondary PCP, Non-PCP Provider and Fee Scheduled Override information for the searched member.

The screenshot shows a software interface with a top navigation bar containing tabs: Contact Form, Eligibility, Claims, Accumulators, Providers, Authorizations, and Group. Below this is a sub-navigation bar with tabs: Summary, Additional info, Provider, COB, Medicaid, and Medicare. The 'Provider' tab is selected.

On the left side, there is a vertical label 'Related to'.

The main content area is divided into three sections:

#### Secondary PCP Information

Effective	Expiration	PCP Number	Name	PCP Org	Name
01/01/2006	99/99/9999	2010007	Joshua Health	AAAA	AAAA Organization Name
01/01/2005	12/31/2005	2010005	Caleb McCloud	YYYY	YYYY Organization Name
01/01/2004	12/31/2004	2010001	Nancy Beeman	XXXX	XXXX Organization Name
01/01/2003	12/31/2003	2010002	Gerald Fishburne	CCCC	CCCC Organization Name

#### Non-PCP Provider

Benefit Category	Description	Non-PCP Provider
XYZ	XYZ Category	ABCD
AAA	AAA Category	1111
BBB	BBB Category	2222
CCC	CCC Category	3333
DDD	DDD Category	4444
XYZ	XYZ Category	5555
777	777 Category	6666

#### Fee Schedule Override

Effective	Expiration	Fee Code	Description
01/01/2006	99/99/9999	RRR	RRR Fee Schedule
06/01/2005	12/31/2005	ABC	ABC Fee Schedule
01/01/2000	06/31/2005	XYZ	XYZ Fee Schedule

- e. COB tab under the Eligibility tab displays the searched members coordination of benefits that have been added to the core system.

Is Health Plan Primary or Secondary? **Eligible**

Insurance Company		
Effective Date	Expiration Date	Priority
<input checked="" type="checkbox"/> 01/01/2006	99/99/9999	1
<input type="checkbox"/> 01/01/2005	12/31/2005	10
<input type="checkbox"/> 01/01/2004	12/31/2004	20

Policy Holder Member #: **71101**  
 Policy Holder Name: **John Park**  
 Ins Company: **89898989**  
 Description: **B Insurance**  
 Address: **101 12th Avenue South**  
**Suite 100**  
 City, State Zip: **Atlanta, GA 88888-9999**  
 Contact: **William Tack** Phone: **(405)123-1243**  
 Other Ins Member #: **23322222**  
 Other Ins Code: **BCBS** Other Ins #: **3434343**

- f. Medicaid tab under the Eligibility tab displays the searched members Medicaid information that has been setup in the core system

Case Number: **858585** Effective Date: **01/01/2007**  
 Case Worker Name:  
 Recipient Number: **585858**  
 Aid Code: **01 AFDC**  
 Alternate ID:  
 Date Received:  
 Relation:  
 Head of Household: **BOB KITTEN**  
 Address: **1555 CALIFORNIA ST**  
 City, State Zip: **CANTON, MI 48188**  
 Phone: **111/555-5252**  
 Language: **SPANISH**

- g. Medicare tab under the Eligibility tab displays the searched members Medicare information that has been setup in the core system

Medicare Number: MR011007001

Months of Prior Coverage:

Proposed HCFA Eff Date:

Proposed HCFA Group:

HCFA State/ County	
Effective Date	County State
01/01/2007	MACOMB MI

Effective Dates and Indicators

Part A 01/01/2007 Y	Part B 01/01/2007 Y	Part C 01/01/2007 Y	Part D 01/01/2007 Y
ESRD 01/01/2007 N	Welfare 01/01/2007 Y	Instit/NHC 01/01/2007 O	MTMP
Hospice 01/01/2007 N	Working-Aged 01/01/2007 N	Aged/Disabled	Pre Disabled
Medicd Add-On	Transplant		

11. **Claims Tab** – this tab shows the searched members claims according to what is in the core system. If you have not done the member search in the Eligibility tab then there will no claims displayed in the Claims tab. All this information is read only.

- a. Search section under the claims tab will allow you to search for a specific claim for that member. Use the search criteria and select the search button.

The screenshot shows the 'Claims' tab in a software application. The interface includes a search section with the following fields:

- Claim Number:
- Alternate Claim Number:
- Beginning Date of Service:
- Ending Date of Service:
- Provider Number:
- Provider First Name:
- Provider Last Name:

A **Search** button is located at the bottom right of the search section.

Below the search section is a 'Search Results' table:

Claim Number	Provider Number-Name Alt Claim Number	Claim Status	Beginning DOS To Pay Amount	Ending DOS Total Charges
<a href="#">01-053105-003</a>	2010001	P	01/01/2005 \$200	01/01/2005 \$1000
<a href="#">01-072205-001</a>	2010005	P	06/25/2005 \$150	06/25/2005 \$500
<a href="#">01-103106-001</a>	2010002	P	10/31/2006 \$200	10/31/2006 \$500



- b. Summary tab – to display information on this tab you have to select a claim on the Search Tab and the claim information will display on this tab

Contact Form
Eligibility
Claims
Accumulators
Providers
Authorizations
Group

Search
Summary
Claim Line(s)
Comments
Benefits

Claim Number:	01-103106-001	Alt Claim Number:	12345
Authorization Number:	<u>45556788899</u>	Claim Status:	Closed
Beginning DOS:	10/31/2006	Ending DOS:	10/31/2006
Vendor:	01	Claim Form Type:	LT
Received Date:	11/15/2006	Adjudication Date:	12/12/2006
Diagnosis Code 1:	789.2	Diagnosis Code 2:	465
Diagnosis Code 3:	56	Diagnosis Code 4:	78
Provider:	<u>201001</u> Nancy Beeman	Benefit Package:	2222 Benefit Pkg Des

Total Claim Amounts			
Charged:	500.00	Deductible:	0.00
Allowed:	200.00	COInsurance:	0.00
Discount:	0.00	CoPay:	10.00
Withhold:	0.00	COB Savings:	0.00
		Patient Paid:	10.00
		To-pay:	200.00

Reason		Reason Information
1234	Desc 1234	
1555	Desc 1555	
1666	Desc 1666	

Other Payer		
ID	Name	Paid Amount
245666	Compass	100.00
245667	Compass	100.00
245668	Compass	100.00

Check Number

- c. Claim Line(s) tab - this tab shows the detail for each line of the claim that was selected in the search tab. When you select a service line the information can change in the additional amount section of this screen.

Contact Form
Eligibility
Claims
Accumulators
Providers
Authorizations
Group

Search
Summary
Claim Line(s)
Comments
Benefits

Claim Number: **01-103106-001**      Alt Claim Number: **12345**

Claim Lines						
BegDate	EndDate	CPTCod		Units Covered	Charged Non Covered	Allowed To-Pay
SvcCod	Md Md Md Md					
<input checked="" type="checkbox"/>	10/31/2006	10/31/2006	99213	1	300.00	100.00
				1		100.00
<input type="checkbox"/>	10/31/2006	10/31/2006	99215	1	200.00	100.00
				1		100.00

**Reason Information**

Reason	Status	Type	EOP
AO Benefit Reduced	Pay	W	
BA Not Covered by Plan	Pay	W	
RR Auth Limit Exceeded	Pay	W	

**Additional Amounts**

Member Liability:	<b>10.00</b>	CoPay:		Deductible:	<b>0.00</b>	CoInsurance:	
Quantity Allowed:		Discount:	<b>0.00</b>	Withhold:	<b>0.00</b>	COB:	

Line Status:	<b>Paid</b>	Paid Date:	<b>12/20/2006</b>
Authorization #:	<b><u>45556788899</u></b>	Adjudication Date:	<b>12/15/2006</b>
Provider:	<b><u>2010001</u> Nancy Beeman</b>	Network Status:	
Provider Capacity:		Line Vendor:	<b>Family Practice Associates</b>
Fee Schedule:	<b>HMOP HMO Provider Fee</b>	Override Code:	<b>OR</b>
Place Of Service:	<b>11 In-Office</b>	EPSDT:	
Diagnosis:	<b>465</b>	Check Number:	<b>00234</b>

- d. Comments tab – this tab will display any comments that are attached to the claim that was selected in the search tab.

Claim Number: 01-103106-001      Alt Claim Number: 12345  
Authorization Number: 45556788899      Claim Status: P  
Beginning DOS: 01/01/2005      Ending DOS: 01/01/2005  
Vendor: 01 Demo Vendor Name      Claim Form Type: LT

Comments

Ajudicated claim to pay per authorization.

- e. Benefits tab – under this tab you can select a claim line number to display the benefit information for that claim line.

Claim Line Number:

Claim Number: **01-103106-001**      Alt Claim Number: **12345**  
 Authorization Number: **45556788899**      Claim Status: **Closed**  
 Beginning DOS: **10/31/2006**      Ending DOS: **10/31/2006**  
 Vendor: **01**      Claim Form Type: **LT**

Benefit Information							
Benefit	Cov Unit	Cov \$	OOP \$	Coins \$	Copay \$	Deduct \$	
Bene111 Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111
Bene222 Bene222	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111
Bene222 Bene222	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111
Bene222 Bene222	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111
Bene222 Bene222	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111	Bene1111

Major Medical							
Benefit	Cov Unit	Cov \$	OOP \$	Coins \$	Copay \$	Deduct \$	
MM111 MM111	MM111	MM111	MM111	MM111	MM111	MM111	

Grouper Benefits							
Benefit	Cov Unit	Cov \$	OOP \$	Coins \$	Copay \$	Deduct \$	
Grp1111 Grp1111	Grp1111	Grp1111	Grp1111	Grp1111	Grp1111	Grp1111	

12. Accumulator Tab – this tab shows the searched member’s (from the Eligibility tab) Accumulator information according to what is set up in the core system. If you do not do a member search in the Eligibility tab then no information will display in this tab. All this information is read only.
- a. Search tab – allows you to search for a particular Benefit for that searched member in the core system

The screenshot displays the 'Accumulators' tab in a software interface. At the top, there are navigation tabs: Contact Form, Eligibility, Claims, Accumulators (selected), Providers, Authorizations, and Group. Below these, there are sub-tabs for 'Search' and 'Summary'. The 'Search' sub-tab is active, showing three input fields: 'Benefit:', 'Group:', and 'Accumulator Inquiry Date:'. A 'Search' button is located to the right of these fields. Below the search area, a 'Search Results' section contains a table with the following data:

Benefit	Description	Group	Description	Benefit Type
BASE	Medical	GRP2	GRP 2 Desc	DEF
Exception	Medical	GRP3	GRP 3 Desc	HIJ
MOV	Medical	GRP	GRP Desc	ABC
Urgent Care	Medical	GRP4	GRP 4 Desc	KLM

- b. Summary tab – for information to display you will have to select a benefit from the search tab.

Contact Form
Eligibility
Claims
Accumulators
Providers
Authorizations
Group

Search
Summary

Accumulator Inquiry Date: <b>01/01/2006</b>	Benefit: <b>BASE Commercial HMO</b>
Benefit Effective Date: <b>01/01/2006</b>	Benefit Expiration Date: <b>12/31/2007</b>
Member Effective Date: <b>01/01/2006</b>	Member Expiration Date: <b>12/31/2007</b>
Benefit Type: <b>HMO</b>	Enrollment Status: <b>Active</b>

Benefit Grouper

Grouper	Description	Type
GRP	GRP ABC	GRPT
GRP1	GRP 1 RFG	GRPT1
GRP2	GRP2 ELK	GRPT2

Single

Max Limits				
Accumed	Type	Exp DT	Limit	Claimed
MAX1	MAXT1	12/31/07	2000.00	50.00
MAX2	MAXT2	12/31/07	2000.00	50.00
MAX3	MAXT3	12/31/07	2000.00	50.00
MAX4	MAXT4	12/31/07	2000.00	50.00

Deductible			
Accumed	Type	Exp DT	Limit
DED	DEDT	12/31/07	500.00
DED1	DEDT1	12/31/07	500.00
DED2	DEDT2	12/31/07	500.00
DED3	DEDT3	12/31/07	500.00

CoInsurance		
Accumed	Type	Exp DT
COI	COIT	
COI1	COIT1	
COI2	COIT2	
COI3	COIT3	

Out Of Pocket		
Accumed	Exp DT	Limit

Cap Limit		
Accumed	Exp DT	Limit

Copay		
Accumed	Type	Exp DT

Family

Out Of Pocket		
Accumed	Exp DT	Limit

Deductible			
Accumed	Limit	Life Accumed	Life Limit

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13. Authorization Tab – this tab shows the searched member’s (from the Eligibility tab) authorizations according to what is in the core system. If you have no searched for a member in the Eligibility tab then no information will display in this tab. All this information is read only.

- a. Search tab – this tab allows you to search for the members authorizations using specific search criteria.

**Search Results**

Authorization Number	Referring Provider Auth Type	Auth Status	Receiving Provider Effective Date	Expiration Date
<a href="#">0103150200101</a>	2610001 Michelle Famil Practice Medical	OPEN	2610003 09/01/2006	10/31/2006
<a href="#">0103150200102</a>	2610001 Michelle Family Practice Medical	Closed	2610003 10/10/2001	03/01/2006

- b. Summary tab – this tab will not display information unless you select an authorization from the search tab.

**Related to**

**Contact Form** | **Eligibility** | **Claims** | **Accumulators** | **Providers** | **Authorizations** | **Group**

**Search** | **Summary** | **Detail Line(s)** | **InPatient**

Authorization: **0103150200101**      Authorization Status: **Open**  
 Referring Provider: **2610001 Michelle Family**      Authorization Type: **ME**  
 Alternate Provider: **Community Hospital 1234**      Precert Status: **Approved**  
 Effective Date: **09/01/2006**      Actual Days: **7**  
 Expiration Date: **10/31/2006**      Approved Days: **10**  
 Line Of Business: **HMO HMO**      Total Certified Days: **7**  
 Claim Type: **MN Medically Necessary**  
 Place of Service: **21**  
 Liability:

**Service Providers**

- 2010001 Nancy Beeman
- 2010002 Gerald Fishburne
- 2010005 Caleb McCloud

**Diagnosis Information**

Principal Code:

- Code 1: 250.3 Diabetes with other coma
- Code 2: 250.4 Diabetes with renal manifestations
- Code 3:
- Code 4:
- Code 5:
- Code 6:
- Code 7:

**Claims**

Claim Number

- 10080100101
- 10080100117
- 10080100102
- 10080100103
- 10080100109
- 10080100110
- 10080100111

**Comments**

- Auth comment 1
- Auth comment 2
- Auth comment 3



- c. Detail Line(s) tab – shows the detail for each line of the claim selected in the search tab. select a different line number to show a different line of the claim

Authorization Line Number: 1 Authorization Number: 0103150200101

Service Class: **First First Class**  
 Service Code: **12444 Srv Code Description**  
 Beginning Date Of Service: **10/10/2001**  
 Ending Date Of Service: **01/01/2002**  
 Authorized Days: **6**  
 Authorized Quantity: **68**  
 Duration: **5**  
 Bed Type: **Bed Type Bed Type Desc**  
 Procedure Estimated Amount: **\$100**  
 Negotiated Amount: **\$99**

Place of Service	
21	Inpatient Hospital
22	Outpatient Hospital
23	EMERGENCY ROOM HOSPITAL
24	AMBULATORY SURGICAL CENTER
26	MILITARY TREATMENT FACILITY

	Approved	Actual
Days	22	5
Unit	86	66
Amount		

- d. Inpatient tab – shows the Inpatient information for the claim that was requested in the search tab

Authorization Number: 0103150200101  
 Actual Admission Date: 08/25/06 Actual Discharge Date: 08/27/06  
 Actual Admission Type: INP Inpatient  
 Actual Discharge Type:

Admitting Diagnosis: 427.5 Cardiac arrest  
 Discharged Diagnosis:

Estimated Admission Date:	8/25/06	Estimated Discharge Date:	8/27/06
Covered Days:	2	Non-Covered Days:	
Acute Days:		Non-Acute Days:	
Pre-Operative Days Denied:			
Bed Type:	HB Hold Bed		

14. Group Tab – this tab shows the searched member’s (from the Eligibility tab) eligibility according to what is set up in the core system. If a member was searched for in the Eligibility tab then no information will be displayed on this screen. All this information is read only.

a. Summary Tab – shows the summary information for the searched members group

Summary		Account		Billing		Contract		Group Information	
Fed Tax ID:	123456789								
Ext Group Number:	ED987654321								
HCFA Plan ID:	444444444								
Group Type:	G Group								
LOB:	PPO Preferred Provider Organization								
Market Segment:	Large Group	Parent Group:	654321	Big Group Parent					
Market Representative:	Jim Smith	Age Cutoffs Stud/Dep/Ret:	21						
Standard Industry Code:	V1234	Billing Type:	Monthly						
Total # of Employees:	10,000	Company:	01						
HIPAA Certificate Flag:	Yes	EPSDT:	Yes						
Status:	Active								
<b>Contact Information</b>									
Group Contact:	Phil Jackson	Email:	biggroup@mail.com						
Phone Number:	(205)437-5200	Fax:	(205)437-5201	800 Number:	(800)437-5200				
<b>Claim Information</b>									
Payer ID:	987654								
Pricing Group:	345678	Big Group Pricing Group	Print EOB:	Yes					
Group to Group Utilization:	222222	Big Group Utilization Group							
Pre-Existing Condition - 1st Period:	3 months								
<b>Group Comments</b>									
This is a great employer group. This healthplan needs to pay special attention to this group and offer them a great renewal package. Keep this group's business.									

- b. Account Tab – shows the account information for the group the searched member is assigned

**Accounts**

Sel	Account#	Address	Account Name	City	Status	Effective State	Expiration Zip
<input checked="" type="checkbox"/>	123456	123 Main Street	ABC Orthodics Corporation	Birmingham	Active	01/01/2006 Alabama	99/99/9999 35242
<input type="checkbox"/>	654321	123 Main Street	Smith's Hardware Inc.	Deirut	Active	01/01/2006 Michigan	99/99/9999 48434
<input type="checkbox"/>	123456	123 Main Street	ABC Orthodics Corporation	Birmingham	Active	01/01/2006 Alabama	99/99/9999 35242
<input type="checkbox"/>	654321	123 Main Street	Smith's Hardware Inc.	Birmingham	Active	01/01/2006 Alabama	99/99/9999 35242

**Contact Information**

Contact 1/Phone: **John Smith** (205)437-5200 Address: **123 Main Street Suite 19**  
 Contact 2/Phone: **Jack Walker** (205)437-5200 City, ST Zip: **Birmingham Alabama 12345**

**Contract Information**

Effective Date: **01/01/2006** Benefit Eff Date: **01/01/2006** Benefit Exp Date: **99/99/9999**  
 Expiration Date: **99/99/9999** Credit Banking Eff Date: **01/01/2006** Credit Banking Exp Date: **99/99/9999**  
 Credit Banking Withdrawal: **Yes**

**Carryovers**

Eff Date: **01/01/2006**  
 Coinsurance: **Yes** Deductible: **Yes** Out-Of-Pocket: **Yes**  
 Copay: **Yes** Units: **Yes** Coverage: **Yes**

- c. Billing Tab – shows the billing information for the searched member in regards to the members group

**Billing**

	-Group Premium-	-Member Premium-
Charge free amount up to day:	15	15
Charge full amount up to day:	15	20
Charge half amount up to day:	20	10
Credit free amount up to day:	20	1
Credit full amount up to day:	15	1
Credit half amount up to day:	15	1

Premium Billing beginning day:	10	Start Premium Billing month:	10
Premium Billing beginning month:	6	Start Premium Billing year:	2006
Premium Billing mode:	Mh	Premium Billing Billed-thru Date:	06/01/2006
Premium Charge Retroactive Days:	30	Billing Cycle:	3
Premium Credit Retroactive Days:	30	Age Calculation Method:	10
Stop Premium Billing code/ Description:			

**Billing Flags**

Individual Billing:	Y
Member Billing:	Y
Secondary Billing:	Y

- d. Contract Tab – shows the searched members contract information corresponding with the members group

Contact Form
Eligibility
Claims
Accumulators
Providers
Authorizations
Group

Summary
Account
Billing
Contract

Effective Date	Expiration Date
<input checked="" type="checkbox"/> 01/01/2006	99/99/9999
<input type="checkbox"/> 01/01/2011	99/99/9999
<input type="checkbox"/> 01/01/2011	99/99/9999

Benefit Plan/Description: **HMO HMO Plan**  
 Contract Number/Description: **123456 Big Group Contract**  
 Hold Code/ Description: **01 Group is suspended**  
 Group to Group Utilization:

Benefit Eff Date: <b>01/01/2006</b>	Benefit Exp Date: <b>99/99/9999</b>	Default Prev Org: <b>PPO</b>
OOP by Salary Flag: <b>Y</b>	Deduct by Salary: <b>Y</b>	Fee Sch: <b>HMO1</b>
Probationary Days: <b>20</b>	Prem Billing Age Flag: <b>Y</b>	

---

**Contract Carryovers**

Eff Date: **01/01/2006**  
 CoInsurance: **Y**      Deductible: **Y**      Out-Of-Pocket: **Y**      Coverage: **y**      Copay: **Y**      Units: **Y**

Tier Code	Description
<input checked="" type="checkbox"/> SNGL	Single Coverage
<input type="checkbox"/> FMLY	Multi Coverage

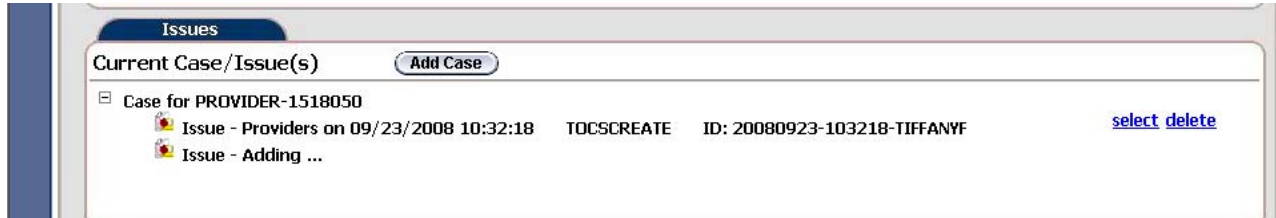
---

**Detailed Tier Information**

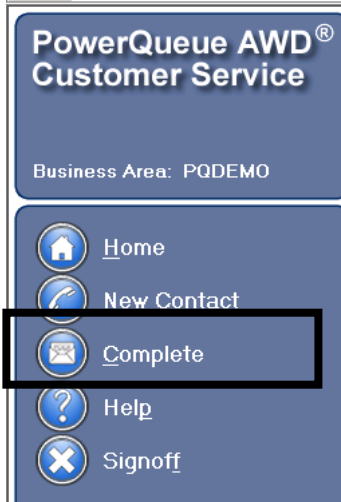
Dependent Minimum: <b>1</b>	Dependent Maximum: <b>21</b>	Dependent Age Limit: <b>21</b>
Other Dependent Minimum: <b>1</b>	Other Dependent Maximum: <b>21</b>	Other Dependent Age Limit: <b>21</b>
Student Age Minimum: <b>19</b>	Other Dependent Only Flag: <b>Y</b>	Spouse Coverage Flags: <b>Y</b>

Related to

- 13. Saving each individual issue – make sure to save the issue before you complete the issue to receive your issue ID number
  - a. Select SAVE



- 14. **Completing the Contact** – make sure all the information necessary has been completed and the contact is ready to end communication.
  - d. Select the Complete button



- e. Since you have already saved your issue and a new issue is being created when you receive the following message “Do you want to save current issue” you will say no (but if you have not saved your current issue you will want to say Yes to this question). The following screen will display to select the Media type (examples: Phone, Fax & Email)

- f. Slide the Face from right to left to determine the contacts mood.

What Media was used for this Contact? Phone

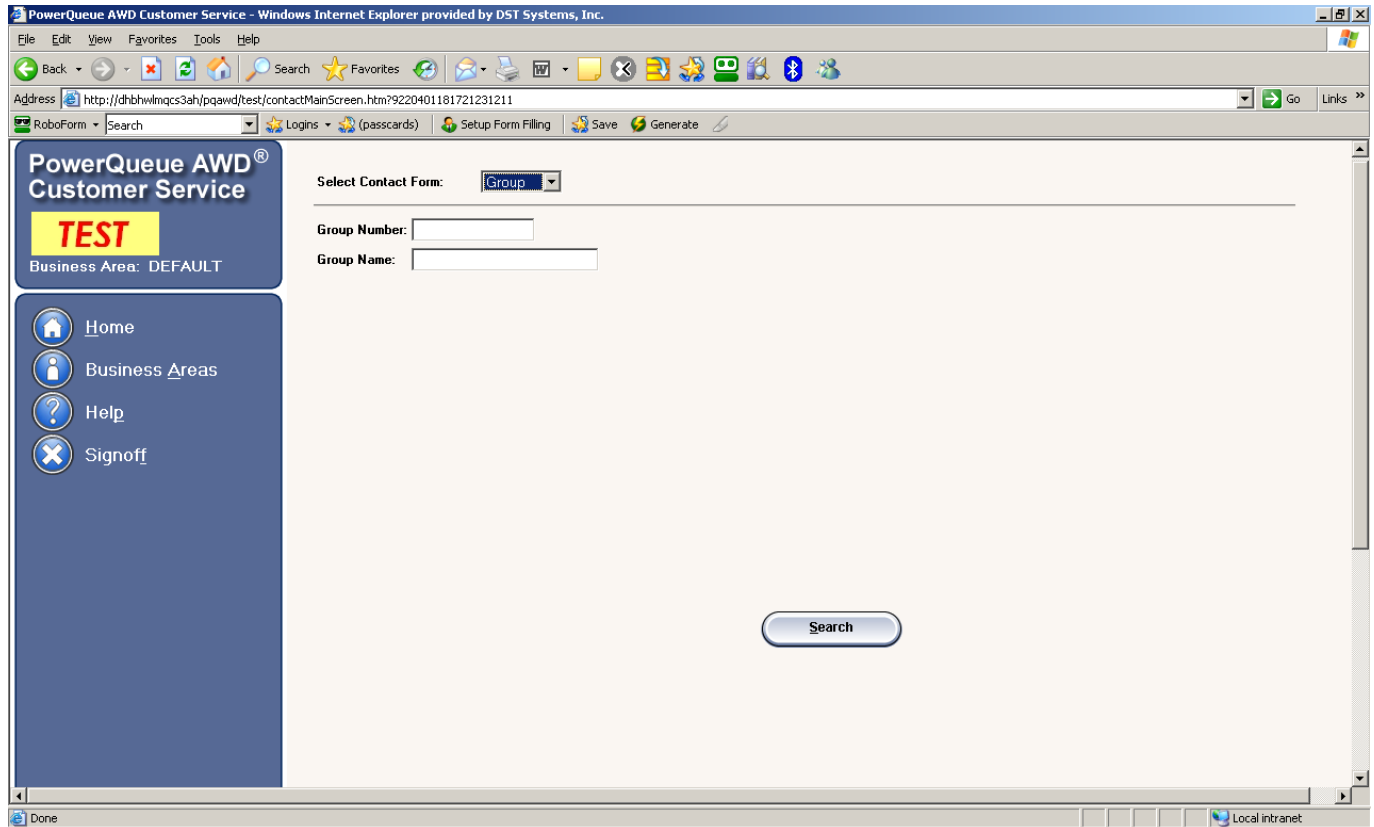
What was the overall mood of the contact? Customer Satisfaction: Neutral

Finish Cancel

- g. Select the Finish button – you will then be in the work list page

## Group Contact

The Group Contact is where the Customer Service Representative will log issues received from a Group representative.



1. Select Group from the Select Contact Form drop down list
2. Enter any of the following search information
  - a. Group Number
  - b. Group Name



3. Hit the Search button

If there are multiple groups for the search criteria entered the following window will appear. If only one group is associated with the search criteria screen print under #4 will appear.

List of Groups

Group Number	Group Name	Effective	Expiration
Address Line	City	State	Zip Code
031LC*HHW	HCLC	01/01/2006	12/31/2007
600 GRANT STREET	PITTSBURGH	PA	15219
044AC*SSI3	HCSW	01/01/2006	12/31/2006
222 WHATEVER	WHITMORE LAKE	MI	48189

4. On the List of Groups screen, click on the group number that corresponds with the group for whom you are searching. The Group Verification screen will open.

**GROUP Verification**

Group Number:	044AC*SSI3	Group Name:	HCSW
Address:	222 WHATEVER	WHITMORE LAKE , MI	48189
Enrollment:	01/01/2006	Expiration:	12/31/2006

**List of Contacts** [Add New Contact](#)

Contact Name	Relationship	Phone	Address	City, State Zip	Authorized
CONTACT		(555) 555-5555			Yes <a href="#">View</a>

5. On the Group Verification screen, review the information in the Group Verification and List of Contacts windows to ensure that the caller is authorized to discuss the Group.
6. On the List of Contacts window, the names of all previous contacts on behalf of the group will appear. Either Add New Contact (a) if the contact is not listed or Select the Contact (b).

a. Add new contact

- i. Select the Add new Contact button

The screenshot shows a web dialog box titled "Add New Contact -- Web Page Dialog". It contains the following fields and controls:

- Contact Name: [Text Input]
- Relationship: [Dropdown Menu]
- Contact Phone: [Text Input] Ext: [Text Input]
- Alternate Phone: [Text Input] Ext: [Text Input]
- Fax Number: [Text Input]
- Email: [Text Input]
- Address Line 1: [Text Input]
- Address Line 2: [Text Input]
- City: [Text Input] State: [Dropdown Menu] Zip: [Text Input]
- Comments: [Large Text Area]
- Authorized:
- Buttons: Save, Delete, Cancel

- ii. Enter in all the contact information
- iii. Check the Authorized box – this indicates the contact is authorized to discuss the group. If the contact is not authorized they will be listed as a contact but there will be no hyperlink to take this contact to the next step.
- iv. Select save – this adds the contact’s information into the system and return to the List of Contacts window.

---

Note: Changing the contacts address does not update The Core System with that address change.

---

- b. Contact Already Exists: On the List of Contacts window, click on the View link next to the contact's name and demographic information to edit the contact information, if required. The Add New Contact window will appear with the contact's previously supplied information already populated in the fields. Edit as necessary and click the Save button to save your changes and return to the List of Contacts window.
  
- i. Select the Contact's name to go to the Group Contact Form screen

**GROUP Verification**

Group Number:	044AC*SSI3	Group Name:	HCSW
Address:	222 WHATEVER WHITMORE LAKE , MI 48189		
Enrollment:	01/01/2006	Expiration:	12/31/2006

**List of Contacts** Add New Contact

Contact Name	Relationship	Phone	Address	City, State Zip	Authorized
CONTACT		(555) 555-5555			Yes <a href="#">View</a>

## Group Contact Form

7. **Contact Form Tab** – this tab contains three additional tabs: Issues form, issues, and contact history. Changes to the Contacts Form screen can be saved by clicking the “complete” button on the index to the left of the screen. If you do not click on this button, your entries will not be saved.

### Group Information

The Group information section displays the group’s information and will stay at the top of the screen as you move through the various tabs.

The screenshot displays the 'Group Contact Form' interface. At the top, the 'Group Information' section shows details for a group named 'HCSW' with Group Number '044AC\*SSI3', Address '222 WHATEVER WHITMORE LAKE, MI 48189', Enrollment date '01/01/2006', and Expiration date '12/31/2006'. The contact name is 'CONTACT' and the phone number is '(555) 555-5555'. Below this is a navigation bar with 'Contact Form' and 'Group' tabs. The 'Issue Form' section includes a 'Subject' dropdown set to 'Group' and a 'Status' dropdown set to 'Select a status...'. Under 'Issue Category', there is a list with '1. Group' selected and four sub-options: 'Group Issue', 'Group Action', 'Group Inquiry', and 'Group Changes', each with an unchecked checkbox. A 'Comments' text area is also present. A message at the bottom of the Issue Form says 'Ready to add a new Issue for GROUP-044AC\*SSI3' with 'Save' and 'Cancel' buttons. The 'Issues' section shows 'Current Case/Issue(s)' with an 'Add Case' button and a list containing 'Case for GROUP-044AC\*SSI3' with a sub-item 'Issue - Adding ...'. The 'Contact History' section shows 'Results (showing 1 of 1)' with 'More' and '+/-' buttons, and a single entry: 'Phone on 01/06/2009 at 13:17:42 - Tocallend' with a sub-item 'Issue on 01/06/2009 at 13:17:27 about Group Group Issue - Tocscrate' and 'Issue ID:20090106-131727-TIFFANYF'. A 'Related to' sidebar is visible on the left.

**Issue Form:** The issues form tab contains Subject and Status list boxes to let you easily indicate the nature of the contact and whether it is a Resolved, Open or Saved status.

- a. Select a Subject – the subjects are configurable for each client
  - i. Examples include:
    1. Group
- b. Select an initial Status – the status are configurable for each client
  - i. Examples include:
    1. TOCSCREATE – sends the issue into the workflow
    2. TOCSSAVE – Saves the issue to your work list to be completed at another time (this issue is not in the workflow)

**Issue Category:** A list of configurable categories and sub-categories that give a brief explanation of the issue that was reported.

- a. Select an issue category and sub-category – click on an issue category from the displayed list of issue categories in the Issue Category box. A list of issue sub-category check boxes associated with the selected issue category will appear. See “**PQAWD CS MBR-PRV-GRP-OTH Call Configuration vXX.xls**” that displays the entire list of Subjects, Categories and Subcategories.

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*Note:*

You may only choose 1 category and 1 subcategory

Standard PQAWD Customer Service allows the user to choose more than one subcategory but choosing more than one will cause the issue to be routed based on the rule priority level and additional subcategory can not be reported on. If you were to choose more than 1 subcategory the issues will be routed to the CSMISC queue for member services to determine what happens to the issue.

---

- i. Example includes:
  1. Group
    - a. Group Issue
    - b. Group Action
    - c. Group Inquiry
    - d. Group Changes

**Comments:**

- c. Enter Comments – when you select a category and a subcategory this adds partial comments into the comments section to get you started. Enter free-form comments in the Comments field below the displayed information
- d. Select the Save button under the comments box to SAVE your current issue.

The screenshot displays a web application interface for managing group information and issues. At the top, there is a 'Group Information' section with the following details:

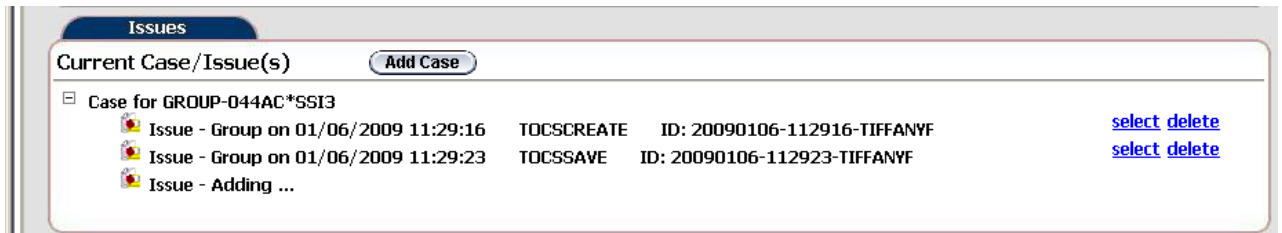
Group Number:	044AC*SSI3	Group Name:	HCSW
Address:	222 WHATEVER	WHITMORE LAKE , MI	48189
Enrollment:	01/01/2006	Expiration:	12/31/2006
Contact Name:	CONTACT	Contact Phone:	(555) 555-5555

Below the group information is a navigation bar with 'Contact Form' and 'Group' tabs. The 'Issue Form' section is active, featuring a 'Subject' dropdown menu set to 'Group' and a 'Status' dropdown menu set to 'Select a status...'. The 'Issue Category' section is titled 'Select an Issue Category' and lists '1. Group' with four sub-options: 'Group Issue', 'Group Action', 'Group Inquiry', and 'Group Changes', each with an unchecked checkbox. To the right of the category list is a large 'Comments' text area. At the bottom left, a blue information icon is followed by the text 'Ready to add a new Issue for GROUP-044AC\*SSI3'. At the bottom right, there are 'Save' and 'Cancel' buttons. A vertical 'Related to' label is visible on the left side of the interface.

**Issues:**

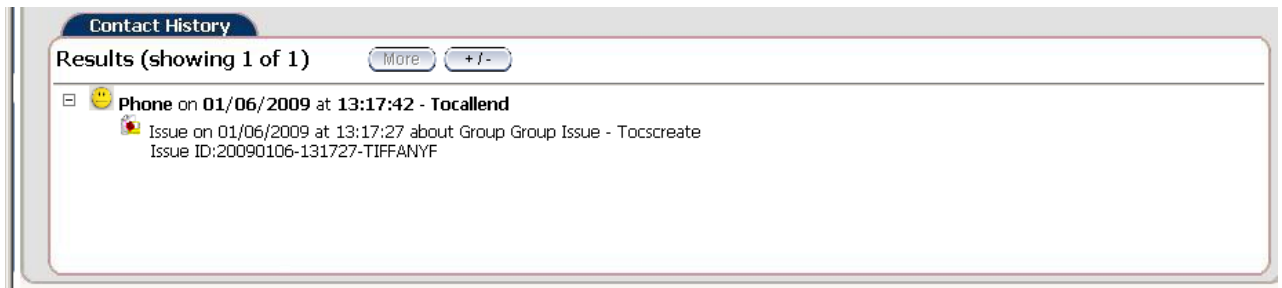
- e. Current Case/Issue(s) – this section shows the case/issues that are open for this particular contact. You can also add another case for one contact, just select Add case and it will take you back to the initial search for member/provider/group/other. This section also allows the user to select or delete issues they have started but have not completed.

Note: The only way to receive the Issue ID is to save the issue before you complete the issue



**Contact History:** provides an at-a-glance view of all previous exchanges with the contact, including contact’s identification information, the subject(s) previously discussed and the current status of the issues discussed. Once you select a contact history you are able to add comments to that issue but you will not be able to reopen issue if it is in the END queue or route an open issue to another queue..

- f. Contact history shows all the various case/issues that were logged for this Contact



8. **Related To** - this tab will display the related member, provider, group, claim, and authorization information. Depending on which claim or authorization has been chosen during a contact creation this information can change.

Member	<input type="text"/>	<input type="button" value="Update"/>	Group	<input type="text"/>	<input type="button" value="Update"/>	Provider	<input type="text" value="PCP1"/>	<input type="button" value="Update"/>
Claim	<input type="text"/>	<input type="button" value="Update"/>	Authorization	<input type="text"/>	<input type="button" value="Update"/>			
Claim DOS:			Auth DOS:					

Related to



9. **Group Tab** - this tab shows the Group information according to what is set up in the core system. All this information is read only.

a. Summary tab – this tab displays the Group information

The screenshot displays a software interface for a 'Group' tab. At the top, there are tabs for 'Contact Form' and 'Group'. Under the 'Group' tab, there are sub-tabs for 'Summary', 'Account', 'Billing', and 'Contract'. The 'Summary' sub-tab is active, showing the following information:

- Fed Tax ID:
- Ext Group Number:
- HCFA Plan ID:
- Group Type: **CD Medicaid**
- LOB: **31 GATEWAY PA 31**
- Market Segment:
- Market Representative:
- Standard Industry Code: **GOVT**
- Total # of Employees: **100**
- HIPAA Certificate Flag:
- Status:
- Parent Group:
- Age Cutoffs Stud/Dep/Ret: **99/99/99**
- Billing Type: **P**
- Company: **11 GATEWAY PA**
- EPSDT: **Y**

Below this information is a section titled 'Contact Information' which includes:

- Group Contact:
- Phone Number:
- Email:
- Fax:
- 800 Number:

The next section is 'Claim Information', which includes:

- Payer ID:
- Pricing Group:
- Group to Group Utilization:
- Pre-Existing Condition - 1st Period:
- Print EOB: **N**

At the bottom is a large empty box titled 'Group Comments'.

b. Account Tab – shows the account information for the group

**Accounts**

Sel	Account#	Account Name	City	Status	Effective State	Expiration Zip
<input checked="" type="checkbox"/>	AGS	AGE/SEX CONSOLIDATED GROUP				

**Contact Information**

Contact 1/Phone: \_\_\_\_\_ Address: \_\_\_\_\_  
 Contact 2/Phone: \_\_\_\_\_ City, ST Zip: \_\_\_\_\_

**Contract Information**

Effective Date: **01/01/2006** Benefit Eff Date: **01/01/2006** Benefit Exp Date: \_\_\_\_\_  
 Expiration Date: **12/31/2006** Credit Banking Eff Date: \_\_\_\_\_ Credit Banking Exp Date: \_\_\_\_\_  
 Credit Banking Withdrawal: \_\_\_\_\_

**Carryovers**

Coinsurance: \_\_\_\_\_ Deductible: \_\_\_\_\_ Eff Date: \_\_\_\_\_ Out-Of-Pocket: \_\_\_\_\_  
 Copay: \_\_\_\_\_ Units: \_\_\_\_\_ Coverage: \_\_\_\_\_

Billing Tab – shows the billing information for the group

Contact Form		Group	
Summary		Account	
Billing		Contract	
<b>Billing</b>			
	-Group Premium-		-Member Premium-
Charge free amount up to day:	1		
Charge full amount up to day:			
Charge half amount up to day:			
Credit free amount up to day:			
Credit full amount up to day:			
Credit half amount up to day:			
<hr/>			
Premium Billing beginning day:	1	Start Premium Billing month:	2
Premium Billing beginning month:	2	Start Premium Billing year:	2009
Premium Billing mode:	P	Premium Billing Billed-thru Date:	
Premium Charge Retroactive Days:		Billing Cycle:	M
Premium Credit Retroactive Days:		Age Calculation Method:	
Stop Premium Billing code/ Description:			
<hr/>			
<b>Billing Flags</b>			
Individual Billing:	N		
Member Billing:	Y		
Secondary Billing:			

c. Contract Tab – shows the Contract information for the Group

The screenshot shows a software interface with a top navigation bar containing 'Contact Form' and 'Group'. Below this is a sub-navigation bar with 'Summary', 'Account', 'Billing', and 'Contract' tabs. The 'Contract' tab is active. On the left side, there is a vertical label 'Related to'. The main content area is divided into several sections:

- Effective Date / Expiration Date:** A table with one row:  01/01/2006
- Benefit Plan/Description:** BASIC BASIC PLAN
- Contract Number/Description:**
- Hold Code/ Description:**
- Group to Group Utilization:**
- Benefit Eff Date:** 01/01/2006    **Benefit Exp Date:**    **Default Prev Org:**
- OOP by Salary Flag:**    **Deduct by Salary:**    **Fee Sch:**
- Probationary Days:**    **Prem Billing Age Flag:**

Below this is a section titled **Contract Carryovers** with the following fields:

- Eff Date:**
- CoInsurance:**    **Deductible:**    **Out-Of-Pocket:**    **Coverage:**    **Copay:**    **Units:**

Next is a table titled **Tier Code**:

Tier Code	Description
<input checked="" type="checkbox"/> 1T	1 TIER

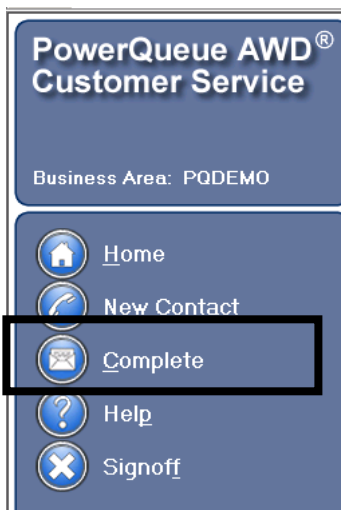
Finally, there is a section titled **Detailed Tier Information** with the following fields:

- Dependent Minimum:** 0    **Dependent Maximum:** 0    **Dependent Age Limit:**
- Other Dependent Minimum:** 0    **Other Dependent Maximum:** 0    **Other Dependent Age Limit:**
- Student Age Limit:**    **One Dependent Only Flag:** N    **Spouse Coverage Flag:** N

15. Saving each individual issue – make sure to save the issue before you complete the issue to receive your issue ID number
  - a. Select SAVE



16. **Completing the Contact** – make sure all the information necessary has been completed and the contact is ready to end communication.
  - a. Select the Complete button



- b. Since you have already saved your issue and a new issue is being created when you receive the following message “Do you want to save current issue” you will say no (but if you have not saved your current issue you will want to say Yes to this question). The following screen will display to select the Media type (examples: Phone, Fax & Email)

- h. Slide the Face from right to left to determine the contacts mood.

Contact Survey -- Web Page Dialog

What Media was used for this Contact? Phone

Customer Satisfaction: Neutral

What was the overall mood of the contact?

Finish Cancel

- i. Select the Finish button – you will then be in the work list page

## Other Contact

PowerQueue AWD<sup>®</sup>  
Customer Service

Business Area: PQDEMO

Home  
Business Areas  
Help  
Signoff

Select Contact Form: Other

Contact Name:


Phone Number:

Search

1. Select Other from the Select Contact Form drop down list
2. Enter any of the following search information
  - a. Contact name
  - b. Phone Number

3. Hit the Search button

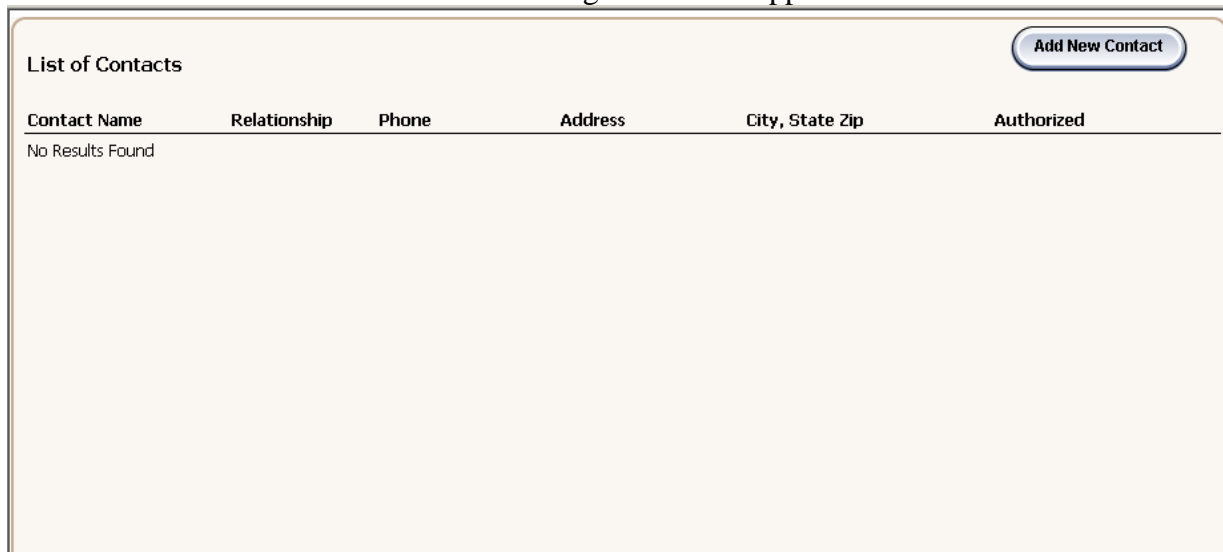
If a match has been found the following screen will appear



The screenshot shows a web interface titled "List of Contacts" with a blue "Add New Contact" button in the top right corner. Below the title is a table with the following columns: Contact Name, Relationship, Phone, Address, City, State Zip, and Authorized. A single row of data is displayed for "Jim Jones", with a "View" link under the Authorized column.

Contact Name	Relationship	Phone	Address	City, State Zip	Authorized
<a href="#">Jim Jones</a>	Representative	(248) 555-5555			Yes <a href="#">View</a>

If a match as not been found the following screen will appear



The screenshot shows a web interface titled "List of Contacts" with a blue "Add New Contact" button in the top right corner. Below the title is a table with the following columns: Contact Name, Relationship, Phone, Address, City, State Zip, and Authorized. The text "No Results Found" is displayed in the first cell of the table.

Contact Name	Relationship	Phone	Address	City, State Zip	Authorized
No Results Found					



4. On the List of Contacts window, the names of all previous contacts will appear. Either Select the Contact given or Add New Contact if the contact is not listed
  - a. Add new contact
    - i. Select the Add new Contact button

The screenshot shows a web dialog box titled "Add New Contact -- Web Page Dialog". It contains the following fields and controls:

- Contact Name: [Text Input]
- Relationship: [Dropdown Menu]
- Contact Phone: [Text Input] Ext: [Text Input]
- Alternate Phone: [Text Input] Ext: [Text Input]
- Fax Number: [Text Input]
- Email: [Text Input]
- Address Line 1: [Text Input]
- Address Line 2: [Text Input]
- City: [Text Input] State: [Dropdown Menu] Zip: [Text Input]
- Comments: [Large Text Area]
- Authorized:
- Buttons: Save, Delete, Cancel

- ii. Enter in all the contact information
    - iii. Check the Authorized box – this indicates the contact is authorized to discuss the information
    - iv. Select save – this adds the contact’s information into the system and return to the List of contacts window.

---

Note: Changing the contacts address does not update The Core System with that address change.

---

- b. On the List of Contacts window, click on the View link next to the contact’s name and demographic information to edit the contact information, if required. The Add New Contact window will appear with the contact’s previously supplied information already populated in the fields. Edit as necessary and click the Save button to save your changes and return to the List of Contacts window.
  - c. Select a Contact
    - i. Select the name of the contact

## Contact Form

5. **Contact Form Tab** – this tab contains three additional tabs: Issues form, issues, and contact history. Changes to the Contacts Form screen can be saved by clicking the “complete” button on the index to the left of the screen. If you do not click on this button, your entries will not be saved.

The screenshot displays a web-based contact management interface. At the top, a 'Contact Information' section shows 'Contact Name: jenny smith' and 'Contact Phone: (555) 555-5555' with an 'Edit' link. Below this is the 'Contact Form' section, which includes an 'Issue Form' with dropdown menus for 'Subject' and 'Status'. The 'Issue Category' section lists '1. Prospect' with four sub-options: 'MBR Prospect Medicare', 'MBR Prospect Medicaid', 'PRV Prospect PAMA-MAPA', and 'PRV Prospect OHMA'. A 'Comments' text area is also present. A status message reads 'Ready to add a new Issue for OTHER-OTHER' with 'Save' and 'Cancel' buttons. The 'Issues' section shows a 'Current Case/Issue(s)' list with an 'Add Case' button and one entry: 'Case for OTHER-OTHER' containing 'Issue - Adding ...'. The 'Contact History' section shows 'Results (showing 3 of 3)' with a 'More' button and a list of three phone calls from 'Tocallend' on 08/19/2008, 08/15/2008, and 08/12/2008, each with associated issue details.

## **Contact Information**

The Contact information section displays the Contact's information and will stay at the top of the screen as you move through the various tabs.

**Issue Form:** The issues form tab contains Subject and Status list boxes to let you easily indicate the nature of the contact and whether it is a resolved, Open or Saved status.

- a. Select a Subject – the subjects are configurable for each client
  - i. Example(s) include:
    1. Prospect
- b. Select a Status – the status are configurable for each client
  - i. Example(s) include:
    1. TOCSCREATE (creates issue and sends to workflow)
    2. TOCSSAVE (saves issue to worklist to complete later)

**Issue Category:** A list of configurable categories and sub-categories that give a brief explanation of the issue that was reported.

- a. Select an issue category & sub-category – click on an issue category from the displayed list of issue categories in the Issue Category box. A list of issue sub-category check boxes associated with the selected issue category will appear. See “**PQAWD CS MBR-PRV-GRP-OTH Call Configuration vXXxls**” that displays the entire list of Subjects, Categories and Subcategories.

---

*Note:*

You may only choose 1 category and 1 subcategory

Standard PQAWD Customer Service allows the user to choose more than one subcategory but choosing more than one will cause the issue to be routed based on the rule priority level and additional subcategory can not be reported on. If you were to choose more than 1 subcategory the issues will be routed to the CSMISC queue for member services to determine what happens to the issue.

---

- v. Example(s) include
  - 6. Prospect
    - a. MBR Prospect Medicare
    - b. MBR Prospect Medicaid
    - c. PRV Prospect PAMA-MAPA
    - d. PRV Prospect OHMA

**Comments:**

- c. Enter Comments – when you select a category and a subcategory this adds partial comments into the comments section to get you started. Enter free-form comments in the Comments field below the displayed information.
- d. Select the Save button under the comments box to SAVE your current issue.

The screenshot displays the 'Contact Form' interface, specifically the 'Issue Form' section. At the top, there are two dropdown menus: 'Subject' (set to 'Prospect') and 'Status' (set to 'Select a status...'). Below these is the 'Issue Category' section, which includes a list of categories under the heading 'Select an Issue Category'. The categories are: '1. Prospect' (which is selected), 'MBR Prospect Medicare', 'MBR Prospect Medicaid' (which is checked), 'PRV Prospect PAMA-MAPA', and 'PRV Prospect OHMA'. To the right of the category list is a 'Comments' text area containing the text 'Prospect - MBR Prospect Medicaid'. At the bottom of the form are two buttons: 'Save' and 'Cancel'. In the bottom left corner, there is a status message: 'Ready to add a new Issue for OTHER-OTHER'.

**Issues:**

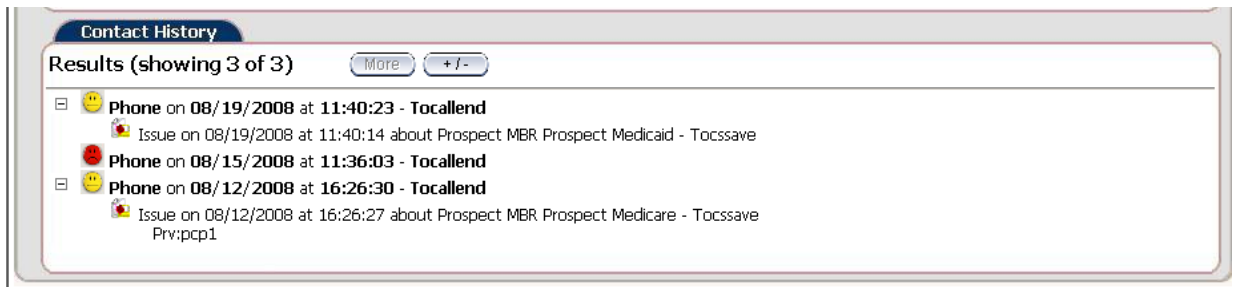
- e. Current Case/Issue(s) – this section shows the case/issues that are open for this particular contact. You can also add another case for one contact. Just select Add case and it will take you back to the initial search for member/provider/group/other. This section also allows the user to select or delete issues they have added before they select the complete button.

Note: The only way to receive the Issue ID is to save the issue before you complete the issue



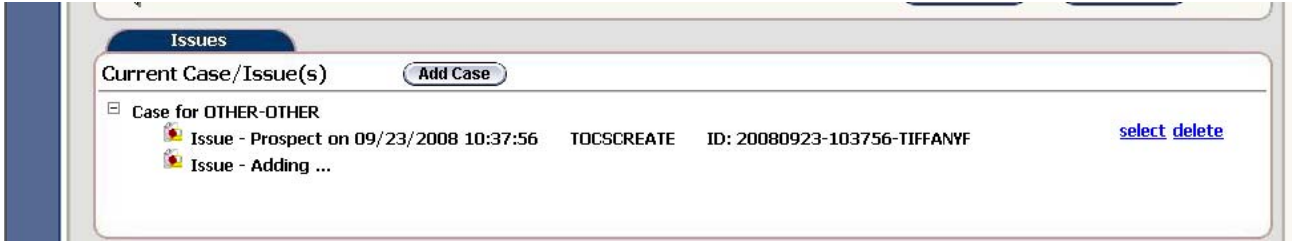
**Contact History:** provides an at-a-glance view of all previous exchanges with the Other contacts, including contacts identification information, the subjects previously discussed and the current status of the issues discussed. Once you select a contact history you are able to add comments to that issue but you will not be able to reopen issue if it is in the END queue or route an open issue to another queue..

Contact history shows all the various case/issues that were logged for the Other Type call



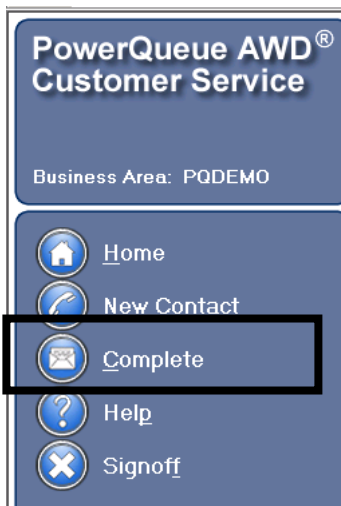
**Saving the Issue** – Make sure to save the issue before completing the issue to receive the issue ID number for each issue

1. Select the Save button and issue will be saved in the issues section of the screen



**Completing the Contact** – make sure all the information necessary has been completed and the contact is ready to end communication.

1. Select the Complete button



2. Since you have already saved your issue and a new issue is being created when you receive the following message “Do you want to save current issue” you will say no (but if you have not saved your issue you will want to say Yes to this question)The following screen will display to select the Media type (examples: Phone, Fax & Email)
3. Slide the Face from right to left to determine the contacts mood.

What Media was used for this Contact? Phone

Customer Satisfaction: Neutral

What was the overall mood of the contact?

Finish Cancel

4. Select the Finish button – you will then be in the work list page

**Home button:**

The Home window displays your Work List; these are all the assignments that are waiting for the representative to be worked.

The screenshot shows the PowerQueue AWD Customer Service interface. On the left is a dark blue sidebar with navigation buttons: Home, Business Areas, New Contact, User Issue Lkup, Issue Lookup, Help, and Signoff. The main area is titled 'Worklist' and contains a table with columns: Priority, Issue ID, Subject, Issue Category, Issue Sub Category, Member, and Provide. A 'New Assi' button is visible in the top right corner of the table area.

Priority	Issue ID	Subject	Issue Category	Issue Sub Category	Member	Provide
300	20080828-102955-TIFFANYF	Member	MBR Action	PCP Transfer	30000126*01	BOB
300	20080828-105207-TIFFANYF	Member	MBR Action	MBR Address Change	30000126*01	1010616
300		Provider	Prov Action	Eligibility Issue		
300	20080902-161942-TIFFANYF	Member	MBR Contact	Welcome Packet	30000081*01	PCP1
300	20080828-111800-TIFFANYF	Member	MBR Action	MBR Address Change	30000126*01	1010616
300	20080828-161320-TIFFANYF	Member	MBR Action	MBR Phone Number	30000126*01	1010616



## USER ISSUE LOOKUP:

This option is a look up options for managers and supervisors to be able to release or assign issues from a user's inbox. This option is handled in the security group assigned to the user. If a user is assigned the security group of <list security group name> they will have this option on their home page. If the user is not in the security groups they will not have this option on their home page.

1. Select USER ISSUE LKUP option
2. Once the window appears select User Issue Lookup in the look up by box

The screenshot shows a web-based dialog box titled "User Issue Lookup -- Web Page Dialog". On the left side, there is a section labeled "Issue Lookup by:" with a dropdown menu currently showing "User Issue Lookup". On the right side, there is a section titled "User Issue Lookup" which includes an "Assigned To User" text input field, "From:" and "To:" date pickers (with dates 8/5/2008 and 9/4/2008 respectively), and "Search" and "Close" buttons. Below this section is a large empty rectangular area labeled "Search Results". At the bottom right of the dialog, there are "Release" and "Assign" buttons.

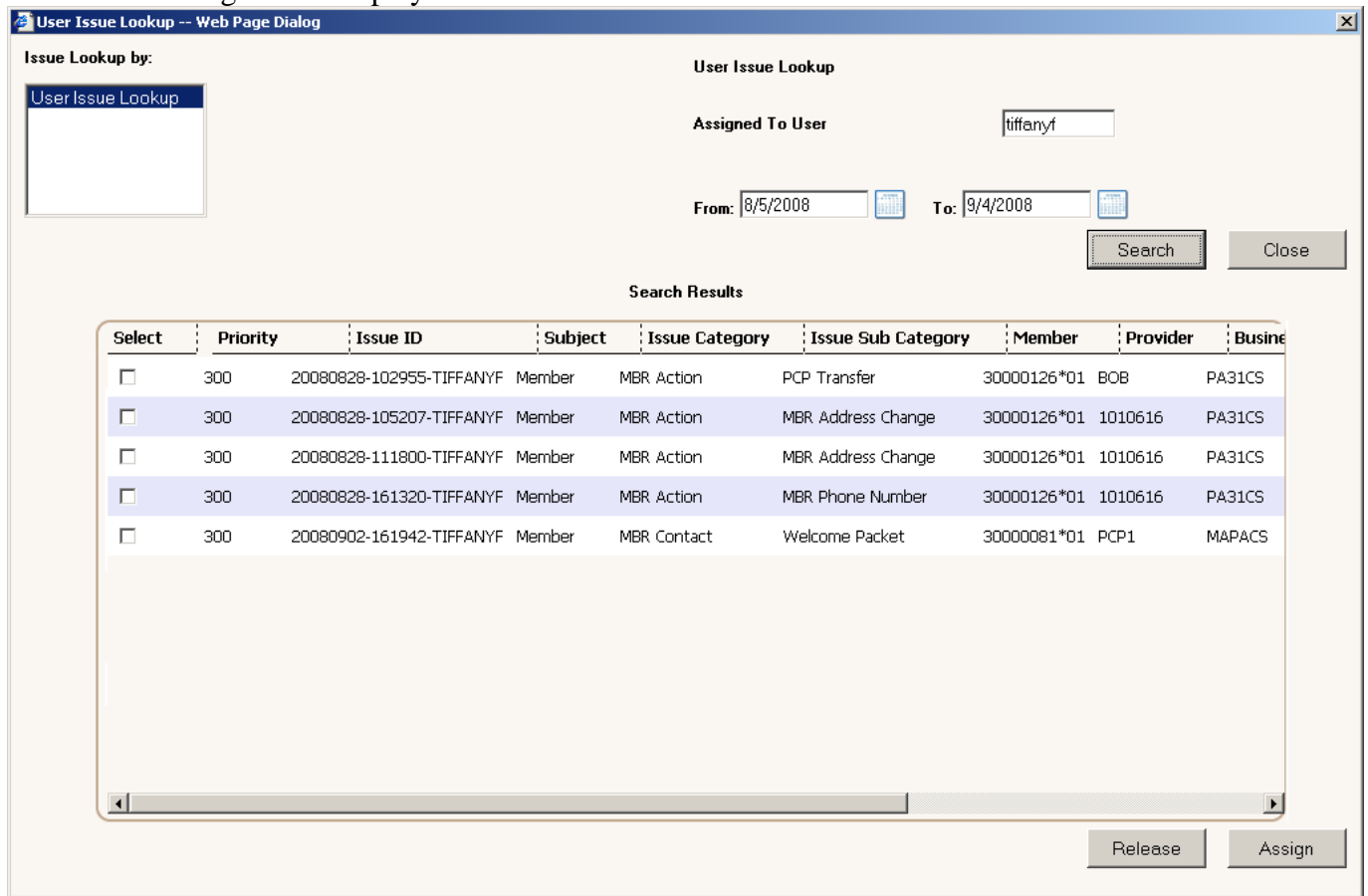
3. Enter the Assigned to User Id (this is ID of the user who's inbox you would like to look at)
4. Hit Search

---

**Note:** Do not use the Release button for issues that are in a **TOCSSAVE** status. These issues will be sent to the **CSSAVE** queue and not be able to be selected. If this happens you will need to contact your AWD Administrator to get them out of the queue. You are able to assign them to yourself to be able to change to the status to **TOCSCREATE** to send them into the workflow.

---

5. The following screen displays the results



6. Select an individual issue or multiple issues
7. Select the Release option to release the issues back into the workflow
  - a. Select the Finish button on the PowerQueue Complete Issue Release window
8. Select the Assign option to assign the issues to an individual user ID
  - a. Select a User ID from the PowerQueue User List/Assign Issue window
  - b. Select Finish

## ISSUE LOOKUP:

This option can be used by all users to look up Customer Service issues that are in the workflow. If a user does not have at least Update ability for all business areas they will not be able to lookup and move issues to their inbox. The user is able to look up an issue by the following criteria:

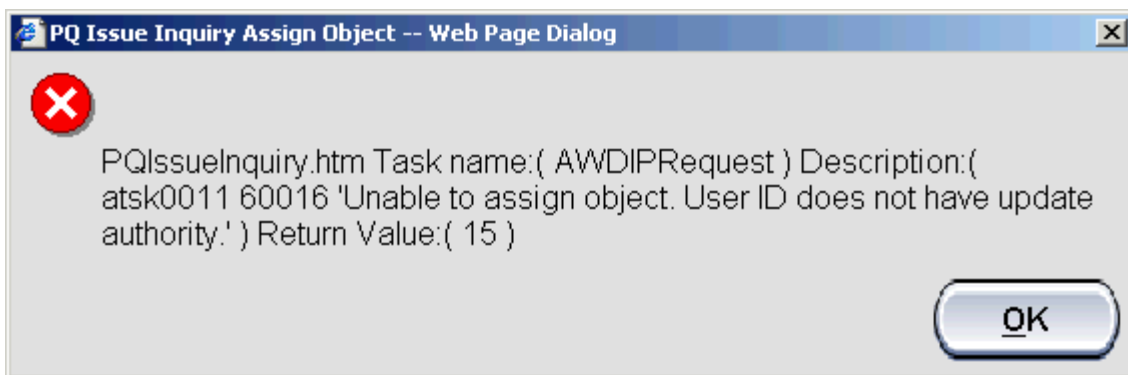
- Issue ID
- Issue Category
- Member Number
- Group Number
- Provider Number
- Date Range

Error messages received when user does not, at least, have privileges to update a business area work item.

- If a user had privileges to a Business Area/worktype combination and pulled an issue into their inbox. Then they no longer have privileges to that Business Area/Worktype combination and the user tried to select that issue from their work list they will receive the following error:

### **User is not setup for Business Area <business area name> in AWD**

- If a user does not have privileges to the business area/worktype combination and they try to move an issue to their inbox they will receive the following error:



**Issue ID:**

- Select Home page
- Select Issue Lookup option
- Select Issue ID
- Enter Issue ID
- Select Search

**Lookup -- Web Page Dialog**

**Issue Lookup by:**

- Issue ID
- Issue Category
- Member Number
- Group Number
- Provider Number
- Date Range

**Issue ID Lookup**

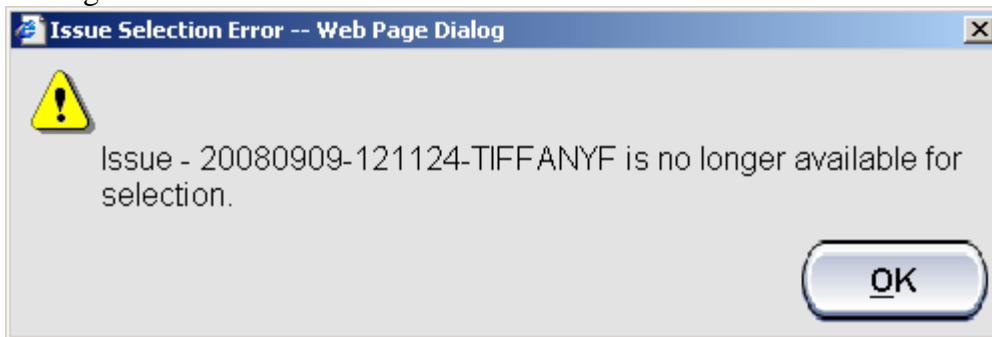
**Issue ID:**

**Search Results**

Priority	Issue ID	Subject	Issue Category	Issue Sub Category	Member	Group	Provider	Business
400	20080917-103612-CSDWA	Member	MBR Action	UM PCP Issue	22149233*01	022SW*T	1014412	PAMACS

- Results will display in the search results window
- Right click on an issue
  - Move issue to Inbox
    - Search results window will show that it is loading
    - Once complete issue will still be listed in the search results window
    - Close the lookup window
    - Refresh inbox and issue will be assigned to your inbox

**Note:** When you Move an issue to your inbox that was in another users inbox that issue will still be in that others users inbox. Once that user tries to select the issue that was moved, they will receive an error message:



Once the user selects OK their inbox is refreshed and the issue will no longer be in their inbox.

---

**Note:** Issues that are in the END queue with a status of **TOEND** can not be moved to your inbox.

If an issue is in a **TOCSSAVE** status and in another's inbox will not be allowed to be moved to your inbox. If a **TOCSSAVE** issue has been accidentally released you will then be able to move it to your inbox through the lookup function.

---

**Note:** Issues that are locked to another individual (lock icon displays next to the users name in Assigned To Column) can not be moved to the requestors inbox.

---

**Note:** Issues that have a status of **TOCSCREATE** can not be moved to the user's inbox. When an issue is in this status it means the issue has not gone through the rules to be assigned the appropriate worktype and status combination.

---

- View Details
  - Once you select the view details button the history window for that issue will display
  - You will be able to view the history of the issue
  - History comments will display oldest to newest
  - You will be able to add a comment to the issue, even issues that are in the END queue. But this will not move the issue from where it is currently at in the workflow.
  - After you have entered your comments select OK to close the window
  - If you do not enter any comments select Cancel to close the window

**PowerQueue Contact History Details -- Web Page Dialog**

Issue Detail for 2008-09-29-09.55.30.602760T01      Issue ID: 20080929-095420-TIFFANYF

AWD Business Area: PAMACS  
 AWD Object Type: MCHGPHON  
 AWD Object Status: Toend

PowerQueue AWD Customer Service Line of Business Fields

Begin Time of Issue - 2008-09-29 09:54:05  
 End Time of Issue - 2008-09-29 09:54:20  
 Issue Category - MBR Action  
 Issue Sub-Category 1 - MBR Phone Number  
 Issue Sub-Category 2 -  
 Issue Sub-Category 3 -  
 Issue Sub-Category 4 -  
 Issue Sub-Category 5 -  
 Subject - Provider  
 Related to Member Number - 21017889\*01  
 Related to Group Number - 022NW\*T  
 Related to Provider Number - 1039340  
 Related to Claim Number -  
 Related to Claim Beginning DOS -  
 Related to Claim Ending DOS -  
 Related to Authorization Number -  
 Related to Auth Beginning DOS -  
 Related to Auth Ending DOS -  
 Contact Name - TABATHA MILLER  
 Contact Address - 1623 BUFFALO RD  
 Contact City - ERIE  
 Contact State - PA  
 Contact Zip - 16510-1003  
 Contact Phone - (814) 403-9234  
 Contact Email -

AWD History

<u>Date</u>	<u>Time</u>	<u>User ID</u>	<u>Status</u>	<u>Queue</u>	<u>Priority</u>	<u>Comments</u>
2008-09-29	09:55:31	TIFFANYF	Tocscreeate	CSVBR	999	MBR Action - MBR Phone Number
2008-09-29	09:56:08	VBRCS2	Tocsenroll	CSENROLL	300	MCHGPHON Rule Applied - Priority 63
2008-09-29	19:12:31	TIFFANYF	Object unassigned			
2008-09-30	15:36:22	TIFFANYF	Object unassigned			

Update Comments:

OK      Cancel

## Issue Category:

- Select Home page
- Select Issue Lookup option
- Select Issue Category look up
- Select Issue Category from the drop down
- Select Issue Sub-Category
- Enter From and to Dates

---

Note: Date range can only be with in a 60 day period. You are able to search any time period but only in 60 day ranges.

---

- Select Search

Lookup -- Web Page Dialog

Issue Lookup by:

- Issue ID
- Issue Category
- Member Number
- Group Number
- Provider Number
- Date Range

Issue Category Lookup

Issue Category

From: 08/05/2008 To: 09/04/2008

Search Close

Search Results

- Results will display in the search results window
- Right click on an issue
  - Move issue to Inbox
    - Search results window will show that it is loading
    - Once complete issue will still be listed in the search results window
    - Close the lookup window
    - Refresh inbox and issue will be assigned to your inbox

---

**Note:** When you Move an issue to your inbox that was in another users inbox that issue will still be in that others users inbox. Once that user tries to select the issue that was moved, they will receive an error message:



Once the user selects OK their inbox is refreshed and the issue will no longer be in their inbox.

---

**Note:** Issues that are in the END queue with a status of **TOEND** can not be moved to your inbox. If an issue is in a **TOCSSAVE** status and in another's inbox will not be allowed to be moved to your inbox. If a **TOCSSAVE** issue has been accidentally release you will then be able to move it to your inbox through the lookup function.

---

**Note:** Issues that are locked to another individual (lock icon displays next to the users name in Assigned To Column) can not be moved to the requestors inbox.

---

**Note:** Issues that have a status of **TOCSCREATE** should not be moved to the user's inbox. When an issue is in this status it means the issue has not gone through the rules to be assigned the appropriate worktype and status combination.

---



- View Details
  - Once you select the view details button the history window for that issue will display
  - You will be able to view the history of the issue
  - History comments will display oldest to newest
  - You will be able to add a comment to the issue, even issues that are in the END queue. But this will not move the issue from where it is currently at in the workflow.
  - After you have entered your comments select OK to close the window
  - If you do not enter any comments select Cancel to close the window

**PowerQueue Contact History Details -- Web Page Dialog**

Issue Detail for 2008-09-29-09.55.30.602760T01      Issue ID: 20080929-095420-TIFFANYF

AWD Business Area: PAMACS  
 AWD Object Type: MCHGPHON  
 AWD Object Status: Toend

PowerQueue AWD Customer Service Line of Business Fields

Begin Time of Issue - 2008-09-29 09:54:05  
 End Time of Issue - 2008-09-29 09:54:20  
 Issue Category - MBR Action  
 Issue Sub-Category 1 - MBR Phone Number  
 Issue Sub-Category 2 -  
 Issue Sub-Category 3 -  
 Issue Sub-Category 4 -  
 Issue Sub-Category 5 -  
 Subject - Provider  
 Related to Member Number - 21017889\*01  
 Related to Group Number - 022NW\*  
 Related to Provider Number - 1039340  
 Related to Claim Number -  
 Related to Claim Beginning DOS -  
 Related to Claim Ending DOS -  
 Related to Authorization Number -  
 Related to Auth Beginning DOS -  
 Related to Auth Ending DOS -  
 Contact Name - TABATHA MILLER  
 Contact Address - 1623 BUFFALO RD  
 Contact City - ERIE  
 Contact State - PA  
 Contact Zip - 16510-1003  
 Contact Phone - (814) 403-9234  
 Contact Email -

**AWD History**

Date	Time	User ID	Status	Queue	Priority
2008-09-29	09:55:31	TIFFANYF	Toccreate	CSVBR	999
2008-09-29	09:56:08	VBRC52	Tocsenroll	CSENROLL	300
2008-09-29	19:12:31	TIFFANYF	Object unassigned		
2008-09-30	15:36:22	TIFFANYF	Object unassigned		

Update Comments:

OK      Cancel

## Member Number:

- Select Home page
- Select Issue Lookup option
- Select Member Number lookup
- Enter Member Number
- Enter From and to Dates
- Select Search

**Issue Lookup by:**

- Issue ID
- Issue Category
- Member Number**
- Group Number
- Provider Number
- Date Range

**Member Lookup**

**Member Number:** 22149233\*01

**From:** 07/25/2008 **To:** 09/23/2008

**Search** **Cancel**

**Search Results**

Priority	Issue ID	Subject	Issue Category	Issue Sub Category	Member	Group	Provider	Business
300	20080911-102656-CSMAD	Member	MBR Contact	UM Correspondence	22149233*01	022SW*T	1014412	PAMACS
300	20080911-105134-CSDWB	Member	MBR Alert	Alert	22149233*01	022SW*T	1014412	PAMACS
400	20080917-103612-CSDWA	Member	MBR Action	UM PCP Issue	22149233*01	022SW*T	1014412	PAMACS

- Results will display in the search results window

- Right click on an issue
  - Move issue to Inbox
    - Search results window will show that it is loading
    - Once complete issue will still be listed in the search results window
    - Close the lookup window
    - Refresh inbox and issue will be assigned to your inbox

---

**Note:** When you Move an issue to your inbox that was in another users inbox that issue will still be in that others users inbox. Once that user tries to select the issue that was moved, they will receive an error message:



Once the user selects OK their inbox is refreshed and the issue will no longer be in their inbox.

---

**Note:** Issues that are in the END queue with a status of **TOEND** can not be moved to your inbox. If an issue is in a **TOCSSAVE** status and in another's inbox will not be allowed to be moved to your inbox. If a **TOCSSAVE** issue has been accidentally release you will then be able to move it to your inbox through the lookup function.

---

**Note:** Issues that are locked to another individual (lock icon displays next to the users name in Assigned To Column) can not be moved to the requestors inbox.

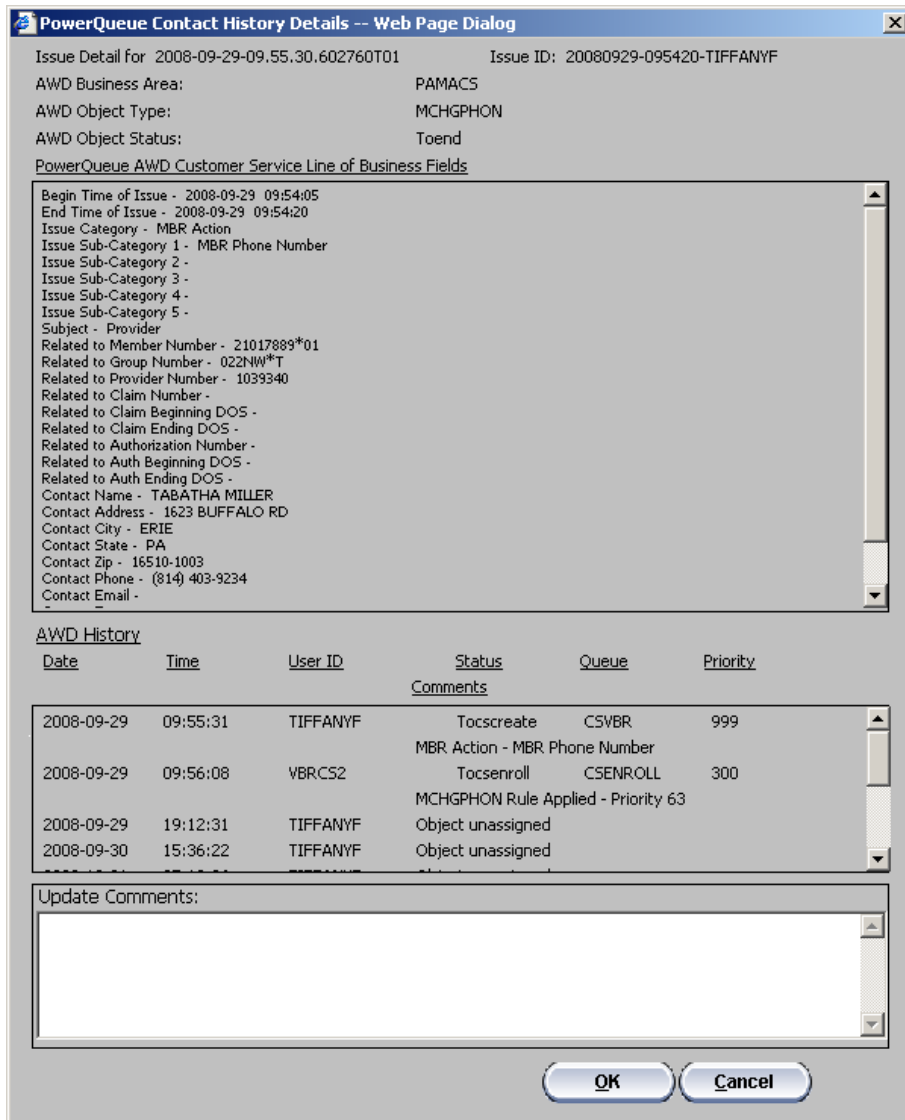
---

**Note:** Issues that have a status of **TOCSCREATE** should not be moved to the user's inbox. When an issue is in this status it means the issue has not gone through the rules to be assigned the appropriate worktype and status combination.

---

o View Details

- Once you select the view details button the history window for that issue will display
- You will be able to view the history of the issue
- History comments will display oldest to newest
- You will be able to add a comment to the issue, even issues that are in the END queue. But this will not move the issue from where it is currently at in the workflow.
- After you have entered your comments select OK to close the window
- If you do not enter any comments select Cancel to close the window



## Group Number:

- Select Home page
- Select Issue Lookup option
- Select Group Number lookup
- Enter Group Number
- Enter From and to Dates

Note: Date range can only be with in a 60 day period. You are able to search any time period but only in 60 day ranges.

- Select Search

The screenshot shows a web application window titled "Lookup -- Web Page Dialog". It features a search interface for "Group Lookup". On the left, a dropdown menu labeled "Issue Lookup by:" has "Group Number" selected. The main search area includes a "Group Number" field containing "022SW\*T", a "From" date field with "07/25/2008", and a "To" date field with "09/23/2008". There are "Search" and "Cancel" buttons. Below the search fields, a "Search Results" table is displayed with the following data:

Priority	Issue ID	Subject	Issue Category	Issue Sub Category	Member	Group	Provider	Busine
350	20080911-095148-CSDWA	Member	Seamless Enroll	Not Enroll Opt Out	00529915*01	022SW*T	1017766	PAMAC
300	20080911-102656-CSMAD	Member	MBR Contact	UM Correspondence	22149233*01	022SW*T	1014412	PAMAC
300	20080911-102919-CSMAD	Member	MBR Contact	MC Involuntary Disenroll	22043247*01	022SW*T	1035638	PAMAC
300	20080911-103314-CSMAD	Member	MBR Contact	WA or COB Survey	22043247*01	022SW*T	1035638	PAMAC
300	20080911-103524-CSCDA	Provider	Prov Action	Provider Letters	22043247*01	022SW*T	1035638	PAMAC
300	20080911-104240-CSCDA	Member	MBR Inquiry	Eligibility Verification	00529915*01	022SW*T	1017766	PAMAC
300	20080911-105134-CSDWB	Member	MBR Alert	Alert	22149233*01	022SW*T	1014412	PAMAC
300	20080911-105628-CSDWB	Member	MBR Alert	Mem Serv Other	00529915*01	022SW*T	1017766	PAMAC
300	20080911-122607-CSMAD	Member	MBR Claims	Recovery	22149247*01	022SW*T	1503119	PAMAC
300	20080911-130258-CSBPH	Provider	Prov Inquiry	Other Inquiry	00529915*01	022SW*T	1017766	PAMAC
300	20080911-130619-CSBPH	Provider	Prov Inquiry	Term MBR From PCP Inq	22149247*01	022SW*T	1503119	PAMAC
300	20080911-131425-CSBPH	Provider	Prov Action	Claim Issue BSC	22043247*01	022SW*T	1035638	PAMAC
300	20080912-084150-CSKEB	Member	MBR Action	Specialist as PCP	22043247*01	022SW*T	1035638	PAMAC
300	20080912-085204-CSKEB	Member	MBR Action	MBR Released From PCP	22149247*01	022SW*T	1503119	PAMAC

- Results will display in the search results window

- Right click on an issue
  - Move issue to Inbox
    - Search results window will show that it is loading
    - Once complete issue will still be listed in the search results window
    - Close the lookup window
    - Refresh inbox and issue will be assigned to your inbox

---

**Note:** When you Move an issue to your inbox that was in another users inbox that issue will still be in that others users inbox. Once that user tries to select that issue, that was moved, they will receive an error message:



Once the user selects OK their inbox is refreshed and the issue will no longer be in their inbox.

---

**Note:** Issues that are in the END queue with a status of **TOEND** can not be moved to your inbox. If an issue is in a **TOCSSAVE** status and in another's inbox will not be allowed to be moved to your inbox. If a **TOCSSAVE** issue has been accidentally release you will then be able to move it to your inbox through the lookup function.

---

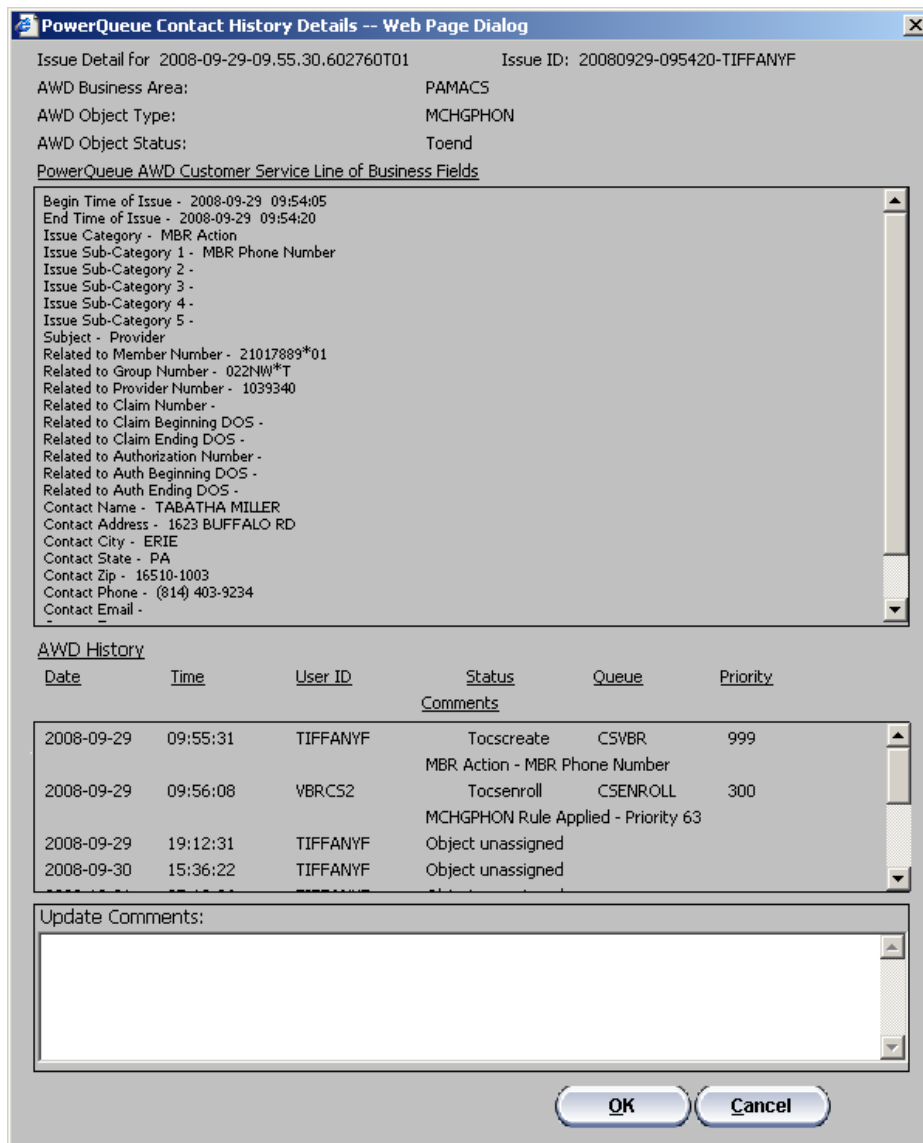
**Note:** Issues that are locked to another individual (lock icon displays next to the users name in Assigned To Column) can not be moved to the requestors inbox.

---

**Note:** Issues that have a status of **TOCSCREATE** should not be moved to the user's inbox. When an issue is in this status it means the issue has not gone through the rules to be assigned the appropriate worktype and status combination.

---

- View Details
  - Once you select the view details button the history window for that issue will display
  - You will be able to view the history of the issue
  - History comments will display oldest to newest
  - You will be able to add a comment to the issue, even issues that are in the END queue. But this will not move the issue from where it is currently at in the workflow.
  - After you have entered your comments select OK to close the window
  - If you do not enter any comments select Cancel to close the window



**Provider Number:**

- Select Home page
- Select Issue Lookup option
- Select Provider Number lookup
- Enter Provider Number
- Enter From and to Dates

Note: Date range can only be with in a 60 day period. You are able to search any time period but only in 60 day ranges.

- Select Search

**Lookup -- Web Page Dialog**

Issue Lookup by:

- Issue ID
- Issue Category
- Member Number
- Group Number
- Provider Number**
- Date Range

**Provider Lookup**

Provider Number:

From:  To:

**Search Results**

Priority	Issue ID	Subject	Issue Category	Issue Sub Category	Member	Group	Provider	Busine
300	20080911-122607-CSMAD	Member	MBR Claims	Recovery	22149247*01	022SW*T	1503119	PAMAC
300	20080911-130619-CSBPH	Provider	Prov Inquiry	Term MBR From PCP Inq	22149247*01	022SW*T	1503119	PAMAC
300	20080912-085204-CSKEB	Member	MBR Action	MBR Released From PCP	22149247*01	022SW*T	1503119	PAMAC
300	20080912-124827-CSTCO	Member	MBR Request	HIPAA Accounting Form	22149247*01	022SW*T	1503119	PAMAC
300	20080915-104009-CSBPH	Member	MBR Inquiry	Mental Hlth Detox Inquiry	22149247*01	022SW*T	1503119	PAMAC
300	20080915-111627-CSDWA	Member	Reporting Only	Request Interpreter	22149247*01	022SW*T	1503119	PAMAC
550	20080915-140002-CSDWB	Member	MBR Alert	Mem Serv Escalated Call	22149247*01	022SW*T	1503119	PAMAC
300	20080918-132335-P014	Member	MBR Inquiry	PCP Inquiry	22043365*01	022SW*T	1503119	PAMAC
300	20080922-200547-P100	Member	Appeals Dept Only	Attorney Record Request	22573518*01	21*NHSP	1503119	MAPAC
300	20080922-200548-P100	Member	MBR Contact	Survey	22573518*01	21*NHSP	1503119	MAPAC
300	20080922-201821-P215	Member	MBR Claims	Administrative Review	22573518*01	21*NHSP	1503119	MAPAC
300	20080922-201822-P215	Member	MBR Request	EOB RX Request	22573518*01	21*NHSP	1503119	MAPAC
300	20080922-202821-P319	Provider	System Admin	Other	22573661*01	21*NHSP	1503119	MAPAC
300	20080922-202822-P319	Member	MBR Other	Returned MED EOB	22573661*01	21*NHSP	1503119	MAPAC

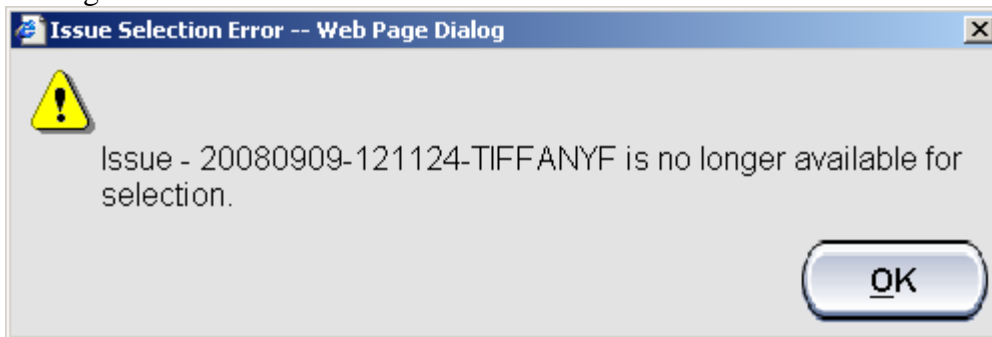
- Results will display in the search results window
- Right click on an issue



- Move issue to Inbox
  - Search results window will show that it is loading
  - Once complete issue will still be listed in the search results window
  - Close the lookup window
  - Refresh inbox and issue will be assigned to your inbox

---

**Note:** When you Move an issue to your inbox that was in another users inbox that issue will still be in that others users inbox. Once that user tries to select that issue, that was moved, they will receive an error message:



Once the user selects OK their inbox is refreshed and the issue will no longer be in their inbox.

---

**Note:** Issues that are in the END queue with a status of **TOEND** can not be moved to your inbox. If an issue is in a **TOCSSAVE** status and in another's inbox will not be allowed to be moved to your inbox. If a **TOCSSAVE** issue has been accidentally release you will then be able to move it to your inbox through the lookup function.

---

**Note:** Issues that are locked to another individual (lock icon displays next to the users name in Assigned To Column) can not be moved to the requestors inbox.

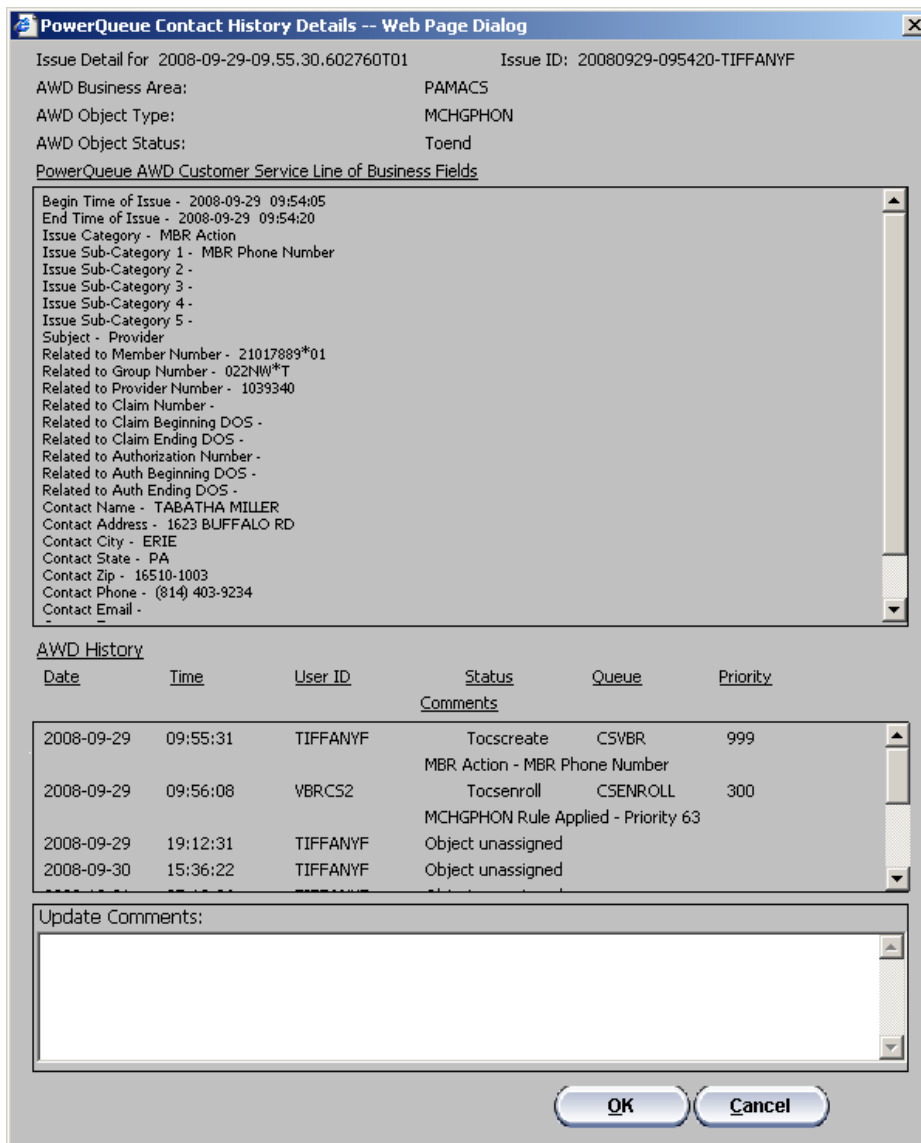
---

**Note:** Issues that have a status of **TOCSCREATE** should not be moved to the user's inbox. When an issue is in this status it means the issue has not gone through the rules to be assigned the appropriate worktype and status combination.

---

o View Details

- Once you select the view details button the history window for that issue will display
- You will be able to view the history of the issue
- History comments will display oldest to newest
- You will be able to add a comment to the issue, even issues that are in the END queue. But this will not move the issue from where it is currently at in the workflow.
- After you have entered your comments select OK to close the window
- If you do not enter any comments select Cancel to close the window



## **WORKLIST:**

The work list serves as your inbox, displaying all the items that are available to be worked by the user. These items are either pulled into the work list by “New Assignment” button or issues that have been Assigned to the user by another user. From the work list the user is able to select an issue to work that issue, assign an issue to another user or release the issue (with applicable security) back into the workflow.

## **New Assignment**

Selecting the “New Assignment” button will bring work to your inbox from the queue that you have been assigned to receive work. Once the issues are in your inbox you will be able to select the issue to work.

---

**Note:** At this time you will receive a total of 15 issues in your inbox with a maximum of 15 issues when you select New Assignment. This is hard coded until the modification to customize this is completed.

---

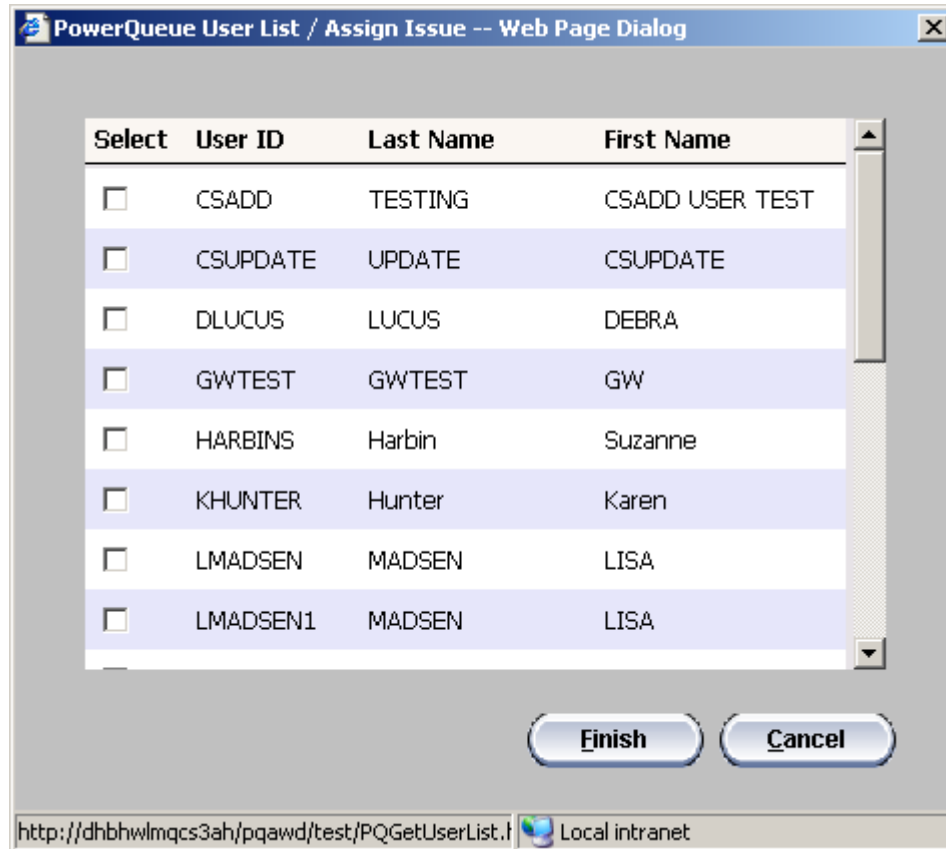
The following will not count towards your maximum number of issues in your inbox at one time.

- Issues that are Saved to your inbox by using TOCSSAVE status when creating issues
- Issues Assigned to you by other users

## Assign Function

The assign function allows the user to assign the issue to another user and get the issue out of their worklist.

1. Right click on an issue
2. Select the Assign function
3. Select the User ID of the user who will receive the issue from the list of users. Make sure the user ID



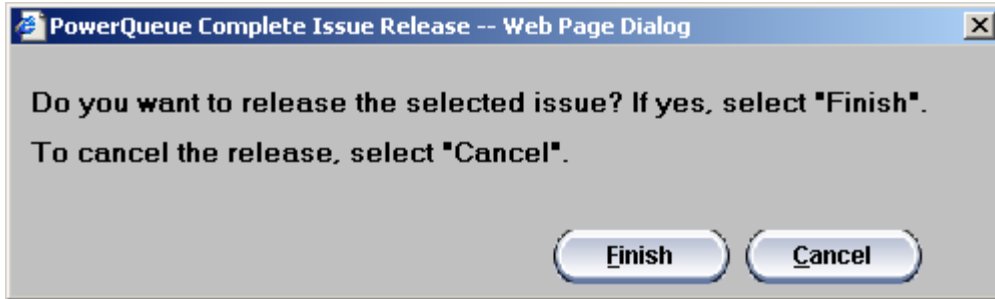
4. Select Finish
5. Issue will no longer be displayed in the users worklist

**Note:** If a user is set to Disabled, Unavailable, Sick, or Vacation in AWD Administration then they will not be displayed in the PowerQueue User List / Assign Issue window to be assigned work. Only Customer Service users that are set to Available in AWD Administration will be able to be selected from the PowerQueue User List to receive assigned issues.

## Release Function

The Release function allows the user to the issue back into the workflow to the queue which the issue was pulled from. This option is only available for users with the appropriate security.

1. Right click on an issue
2. Select the Release function



3. Select the finish button to release issue
4. Issue will no longer be in the users worklist

## Issue Hyperlink

Selecting an issue’s hyperlink will enable the user to pull up the issue to be able to work the issue. By selecting the Issue Hyperlink you can work issues you have saved to your work list, issues that have been assigned to the worklist by another individual or through AWD routing. In your worklist when you place your cursor over the issue you want to select, that issue line will change to a Red color showing that issue is to be selected.

Worklist								
Priority	Subject	Issue Category	Issue Sub Category	Member	Provider	Business Area	Work Type	Status
300	Provider	Prov Action	Eligibility Issue			PA31CS	PAELG	TOCSENROL
999	Member	MBR Request	ID Card	30000126*01	1010616	DEFAULT	ISSUE	TOCSSAVE
999	Providers	Sp Investigations	Special Investigations Issue	30000126*01	N100	DEFAULT	ISSUE	TOCSSAVE
999	Providers	Prov Communication	PRV Communication		N100	DEFAULT	ISSUE	TOCSSAVE
999	Member	MBR Action	Claims Issue	30000126*01	BOB	DEFAULT	ISSUE	TOCSSAVE
999	Prospect	Prospect	MBR Prospect Medicaid			DEFAULT	ISSUE	TOCSSAVE
999	Member	Appeals Dept Only	DOH External Complaint	30000126*01	1010616	DEFAULT	ISSUE	TOCSSAVE
999						MAPACS	CALLER	TOEND

## Working Saved Issues

Selecting an issue that has been saved to your worklist for further evaluation before being sent into the workflow.

1. Select the issue hyperlink from the worklist

**Member Information**

Member Number: 30000126*01	Group Number: 044AC*SSI3 HCSW	Effective: 01/01/2007
Member Name: LAILA SMITH 454545 GREEN STREET	Date Of Birth: 10/01/2000 PLYMOUTH, MI 48170	Expiration: Region: WESTMORELAND COUNTY
Subscriber Number: 30000126	Subscriber Name: LAILA SMITH	HoH: BOB KITTEN
Contact Name: LAILA SMITH	Contact Phone: (555) 555-5555	<a href="#">Edit</a>

Contact Form
Eligibility
Claims
Accumulators
Providers
Authorizations
Group

**Issue Form**

Subject: Member      Routing Status: TOCSSAVE      Worklist:

**Issue Category**

Select an Issue Category

<ol style="list-style-type: none"> <li>1. <b>Prov Inquiry</b></li> <li>2. <a href="#">Prov Action</a></li> <li>3. <a href="#">MBR Inquiry</a></li> <li>4. <a href="#">MBR Action</a></li> <li>5. <a href="#">MBR Request</a></li> <li>6. <a href="#">MBR Dental Issue</a></li> <li>7. <a href="#">MBR Redirect Call</a></li> <li>8. <a href="#">MBR Appeals</a></li> <li>9. <a href="#">MBR Notification</a></li> <li>10. <a href="#">RX Dept Only</a></li> </ol>	<table style="width: 100%; border-collapse: collapse;"> <tr><td><input type="checkbox"/> MBR Address Change</td></tr> <tr><td><input type="checkbox"/> MBR Phone Number</td></tr> <tr><td><input checked="" type="checkbox"/> PCP Transfer</td></tr> <tr><td><input type="checkbox"/> MBR to PCP Existing Clsd</td></tr> <tr><td><input type="checkbox"/> Eligibility Update</td></tr> <tr><td><input type="checkbox"/> Pharmacy Issue</td></tr> <tr><td><input type="checkbox"/> Enrollment Request</td></tr> <tr><td><input type="checkbox"/> Disenroll Request</td></tr> </table>	<input type="checkbox"/> MBR Address Change	<input type="checkbox"/> MBR Phone Number	<input checked="" type="checkbox"/> PCP Transfer	<input type="checkbox"/> MBR to PCP Existing Clsd	<input type="checkbox"/> Eligibility Update	<input type="checkbox"/> Pharmacy Issue	<input type="checkbox"/> Enrollment Request	<input type="checkbox"/> Disenroll Request
<input type="checkbox"/> MBR Address Change									
<input type="checkbox"/> MBR Phone Number									
<input checked="" type="checkbox"/> PCP Transfer									
<input type="checkbox"/> MBR to PCP Existing Clsd									
<input type="checkbox"/> Eligibility Update									
<input type="checkbox"/> Pharmacy Issue									
<input type="checkbox"/> Enrollment Request									
<input type="checkbox"/> Disenroll Request									

**Comments**

Save
Cancel

i Update the Issue 20080904-122658-TIFFANYF and select 'Complete'

**History / Comments**

Date	Time	User ID	Status	Queue	Priority
2008-09-04	12:24:56	TIFFANYF	Tocssave	CSSAVE	999
2008-09-04	12:24:57	TIFFANYF	MBR Action - PCP Transfer		
2008-09-04	12:25:02	TIFFANYF	Assigned to: TIFFANYF		

**Contact History**

Results (showing 10 of 12)      More      +/-

- ☺ **Phone on 09/04/2008 at 12:26:58 - Tocallend**  
📞 Issue on 09/04/2008 at 12:26:58 about Member PCP Transfer - Tocssave  
 Issue ID:20080904-122658-TIFFANYF Mbr:30000126\*01    Prv:1010616
- ☺ **Phone on 09/04/2008 at 08:06:27 - Tocallend**  
📞 Issue on 09/04/2008 at 08:06:02 about Member Dental Provider Inquiry - Tocsmisc  
 Issue ID:20080904-080602-TIFFANYF Mbr:30000126\*01    Prv:1010616
- 📞 Issue on 09/04/2008 at 08:06:20 about Member Disenroll Request - Tocsmisc  
 Issue ID:20080904-080620-TIFFANYF Mbr:30000126\*01    Prv:1010616

2. You are able to update the issues Subject, Category and Subcategory
3. You are able to add any additional comments – previous comments will display in the History/comments section
4. You are able to search any other information from the various tabs that link to MHC
5. By Un-checking the Worklist check box you are able to change the status of the issue to either save it back to your worklist (TOCSSAVE) or send it into the workflow (TOCSCREATE) for routing
6. To complete the issue you must select the Complete button on the side panel tool bar. The Save and Cancel options are no longer available as they only work when opening a new Case not with individual issues.

---

Note: Once you have saved an issue to your inbox the comments can not be changed they are saved to that issue. You are able to add new comments at any time.

---

## Working Routed/Assigned Issues

Select an issue's hyperlink from the worklist to work a PQAWD customer service issue that has been routed through the workflow.

Priority	Issue ID	Subject	Issue Category	Issue Sub Category	Member	Provider	Business Area
300	20080828-102955-TIFFANYF	Member	MBR Action	PCP Transfer	30000126*01	BOB	PA31CS
300	20080828-105207-TIFFANYF	Member	MBR Action	MBR Address Change	30000126*01	1010616	PA31CS
999	20080904-122658-TIFFANYF	Member	MBR Action	PCP Transfer	30000126*01	1010616	DEFAULT
300	20080902-161942-TIFFANYF	Member	MBR Contact	Welcome Packet	30000081*01	PCP1	MAPACS
300	20080828-111800-TIFFANYF	Member	MBR Action	MBR Address Change	30000126*01	1010616	PA31CS
300	20080828-161320-TIFFANYF	Member	MBR Action	MBR Phone Number	30000126*01	1010616	PA31CS

1. Select issue hyperlink (will highlight in red when cursor hovers)
2. Issue contact form will display

**Member Information**

Member Number: 30000126*01	Group Number: 044AC*SSI3 HCSW	Effective: 01/01/2007
Member Name: LAILA SMITH 454545 GREEN STREET	Date Of Birth: 10/01/2000 PLYMOUTH, MI 48170	Expiration: Region: WESTMORELAND COUNTY
Subscriber Number: 30000126	Subscriber Name: LAILA SMITH	HoH: BOB KITTEN
Contact Name: LAILA SMITH	Contact Phone: (555) 555-5555	<a href="#">Edit</a>

**Issue Form**

Subject: Member      Routing Status: TOCSENROLL      Worklist:

<p><b>Selected Issue Category</b></p> <p>MBR Action      MBR Address Change</p>	<p><b>Comments</b></p> <div style="border: 1px solid gray; height: 100px;"></div>
---	---

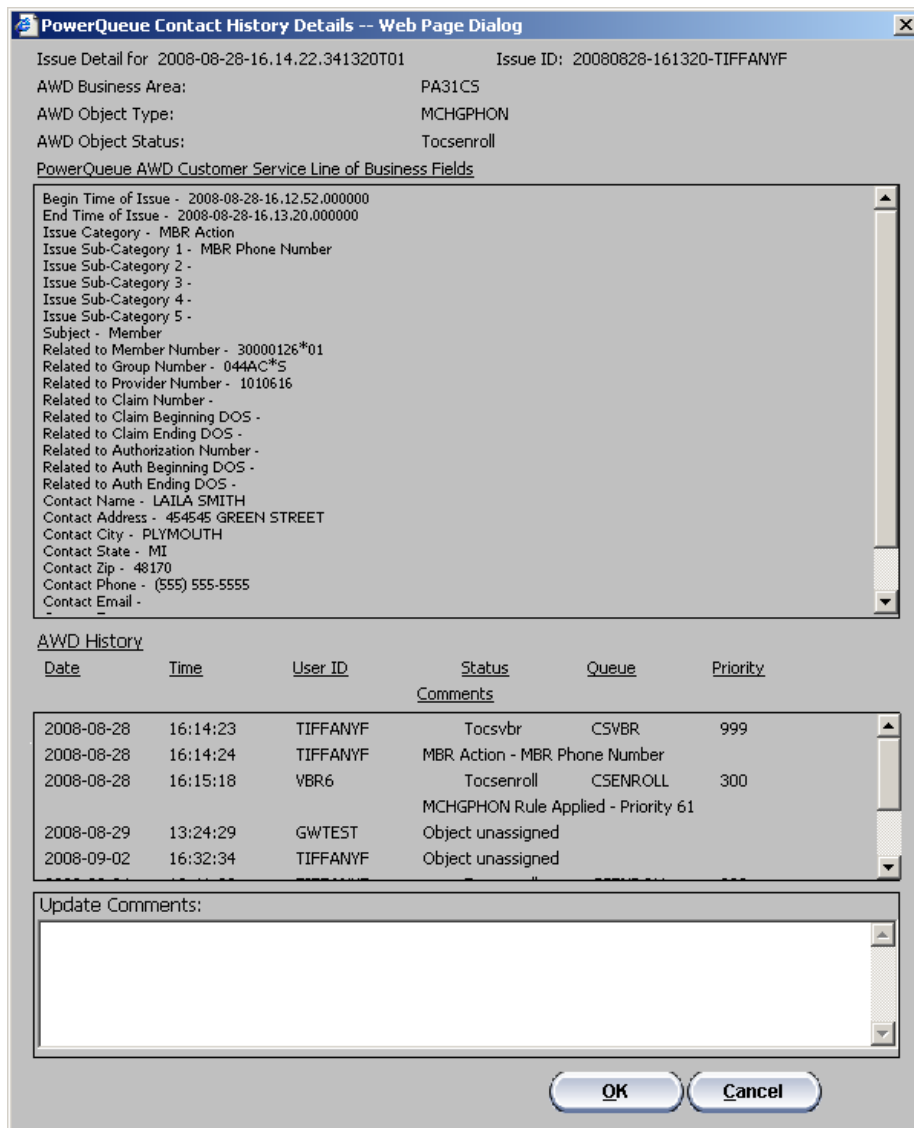
Release      
 Assign

**History / Comments**

Date	Time	User ID	Status	Queue	Priority
2008-08-28	10:52:17	TIFFANYF	Tocscreeate	CSVBR	999
2008-08-28	10:52:44	VBR5	MBR Action - MBR Address Change Tocsenroll	CSENROLL	300
2008-09-02	16:28:48	TIFFANYF	MCHGADD - PAMACS Object unassigned		



3. Issue subject, category & subcategory can not be changed they are read only
4. Issue history/comments displays for all work steps of the issue (oldest to newest)
  - a. Comments with “Object Unassigned” means the issue was release back into the workflow at one point
  - b. Comments with “Assigned to” means the issue was assigned from one individual to another or you moved the issue to your inbox from a lookup (i.e. you assign the issue to yourself).
5. Issue Contact History displays the history for all the cases/issues for this user and business area
  - a. Select an issue and this will display the issues history information
  - b. You are also able to add comments to issues that are displaying in history (even to issues that have been completed and are in the END queue)



6. User is able to Release the issue by selecting the release button (if security is applicable)
7. User is able to Assign the issue to another user by selecting the Assign button

---

**Note:** If a user is set to Disabled, Unavailable, Sick, or Vacation in AWD Administration then they will not be displayed in the PowerQueue User List / Assign Issue window to be assigned work. Only users that are set to Available in AWD Administration will be able to be selected from the PowerQueue User List to receive assigned issues.

---

8. User is able to verify MHC information using the various tabs
9. Select the related to option to see the issues related information:
  - a. Member number
  - b. Group number
  - c. Provider Number
  - d. Claim Number
  - e. Authorization Number
  - f. Claim DOS
  - g. Auth DOS
10. User is able to add comments with out routing the issue. Add a comment then select complete (keeping the worklist check box checked) this will add a comment without releasing issue from your inbox.
11. When the user is ready to move or close the issue
  - a. Uncheck the Worklist check box
  - b. Select a status from the status dropdown box
  - c. Select the Complete button
  - d. You will be taken the inbox and the issue will no longer be in the users inbox

**LASTOPER** status – this status will be listed in the status drop down window. This will allow the user to send the issue back to the user who previously worked the issue. This is used if you would like the issue to go back to the previous user instead of a queue for another individual to pick up the issue.

---

**Note:** When you receive a work item in your inbox that has the Status of LASTOPER do NOT use the release function. The item will be in the LASTOPER queue and will not be able to be work selected. You will be able to do a look up and move the issue into your inbox if someone does accidentally release the item.

---

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**Note:** When you receive a work item in your inbox that has the Status of LASTOPER do NOT use the Assign function. The status LASTOPER is set to send the item back to the last user, therefore, if you try and assign the issue to someone when it is in a LASTOPER status the issue will just come back into your inbox.

---

***Help button:***

The Help button will take the user to another window that gives additional information about PQAWD Customer Service. The help will give a description of how to log a member, provider and other type call. This help window will also give a description of the various PQAWD Customer Service screens.

***Sign off button:***

This button will sign the user out of the PQAWD Customer Service Application

## Glossary of Terms:

<i>Term</i>	<i>Definition</i>
Assign	To move a work object to a user's inbox for processing.
AWD Admin	AWD's administrative functions program. Admin provides access to the operating parameters of AWD, including resources, data dictionary, users, and workflow configuration
Business Area	Group of worktypes with a specific business correlation.  <b>Equates to The Core System Line of Business Except for Provider &amp; Other type calls as they will always have DEFAULT business area</b>
Business Intelligence (BI)	Event based reporting system used to manage current work and analyze historical trends.
Category	High level explanation of the issue  Looking at the MBR-PRV-GRP-OTH call configuration spreadsheet will give a list of all the Categories for PQAWD Customer service.
Issue Lookup	An option that allows a user to lookup PQAWD customer Service Issues
Privilege	The type of access that a user has to an AWD object or queue
Queue	The AWD equivalent of a holding area where a work object awaits selection for its next step in the workflow. The current status of a work object determines its queue.
Release	Removes the work object from the Inbox making it available for work select by other processors from the queue originally pulled from

<b><i>Term</i></b>	<b><i>Definition</i></b>
Role	Group of users with the same AWD Privileges
Status	Routes the work object to the defined queue
SubCategory	Detailed explanation of the issue  Looking at the PQAWD CS MBR-PRV-GRP-OTH call configuration spreadsheet will give a list of all the Subcategories for PQAWD Customer service.
Subject	Highest level explanation of the issue  Looking at the MBR-PRV-GRP-OTH call configuration spreadsheet will give a list of the entire list of Subjects for PQAWD Customer service.
User Lookup	This is a lookup designed for managers to release or assign issues out of a users inbox
User ID	ID used to log onto AWD
Work Group	Groups users for reporting through AWD Business Intelligence
Work Type	Type of issue Subject, category & subcategory will equate to a worktype according to our MBR-PRV-GRP-OTH call configuration spreadsheet