



Provider Portal 3.0 Manual

Health Axis 3.0 Provider Portal User Guide

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Health Axis 3.0 Provider Portal



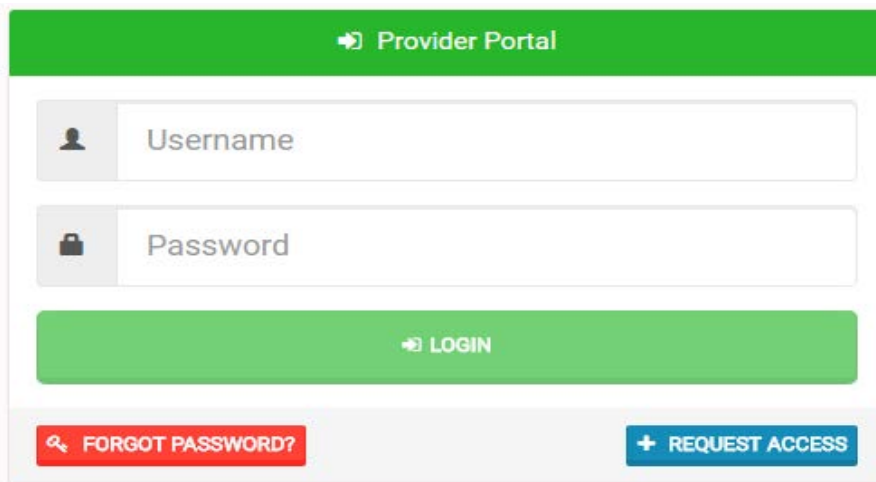
Provider Portal 3.0

The Provider Portal is a quick resource that allows Providers convenient access to member and claim information. The portal is designed to provide access to: Claim status, Member's Eligibility, Referrals and Authorizations.

How to Access the Provider Portal

Enter the URL.

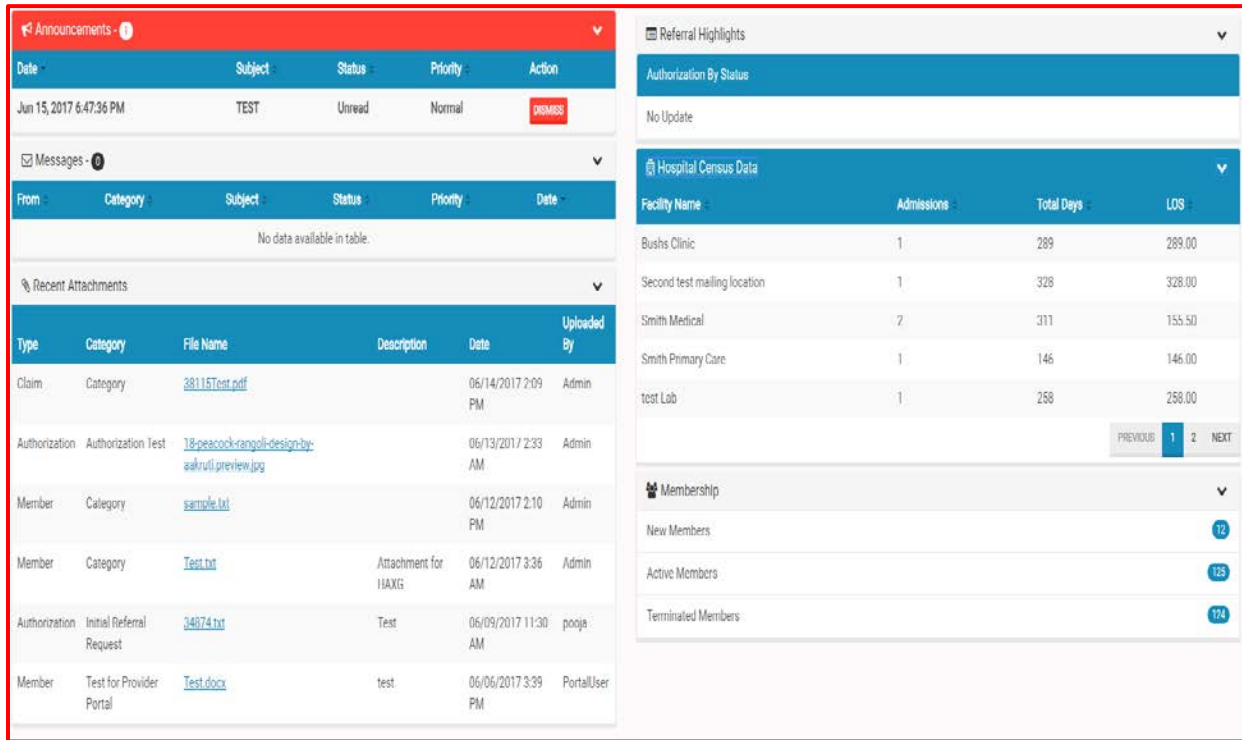
Note: The Provider Portal cannot be accessed through Internet Explorer, users must use Chrome.



The screenshot shows the Provider Portal login interface. At the top, there is a green header bar with a white arrow icon and the text "Provider Portal". Below the header, there are two input fields: the first is labeled "Username" with a person icon on the left, and the second is labeled "Password" with a lock icon on the left. Below these fields is a large green button with a white arrow icon and the text "LOGIN". At the bottom of the form, there are two buttons: a red button with a magnifying glass icon and the text "FORGOT PASSWORD?", and a blue button with a plus sign icon and the text "REQUEST ACCESS".

Dashboard

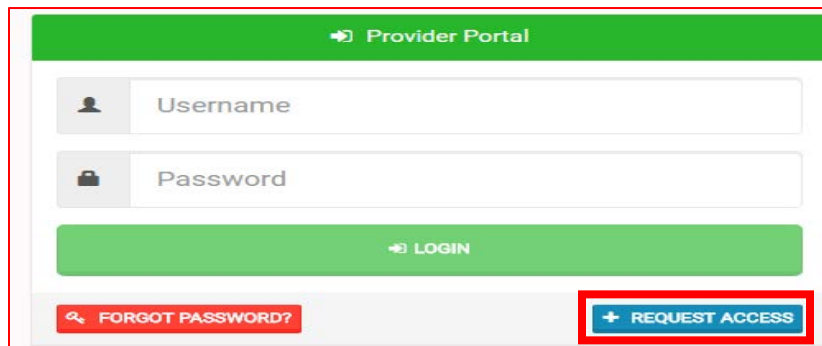
The Dashboard is the landing page displayed once the user logs into the portal. The dashboard gives the user an overview of authorizations by status, Hospital Census Data, Membership (New, Active and Terminated Members), Announcements, Messages, and Recent Attachments.



The dashboard is divided into several sections:

- Announcements:** A table with columns: Date, Subject, Status, Priority, Action. One announcement is visible: Jun 15, 2017 6:47:36 PM, TEST, Unread, Normal, with a DISMISS button.
- Messages:** A table with columns: From, Category, Subject, Status, Priority, Date. It shows "No data available in table."
- Recent Attachments:** A table with columns: Type, Category, File Name, Description, Date, Uploaded By. It lists several attachments including a PDF, a JPG, and a DOCX.
- Referral Highlights:** A section titled "Authorization By Status" showing "No Update".
- Hospital Census Data:** A table with columns: Facility Name, Admissions, Total Days, LOS. It lists facilities like Bushs Clinic, Second test mailing location, Smith Medical, Smith Primary Care, and test Lab.
- Membership:** A summary section showing counts for New Members (12), Active Members (128), and Terminated Members (114).

How to Request Access to the Provider Portal



The login form includes the following elements:

- Username:** Input field with a user icon.
- Password:** Input field with a lock icon.
- LOGIN:** A large green button.
- FORGOT PASSWORD?:** A red button with a magnifying glass icon.
- REQUEST ACCESS:** A blue button with a plus icon, highlighted with a red box.

New Provider Portal users should request access by contacting the Provider Administrator.

Note: There are four possible user types: Physician, Facility, Vendor, or IPA. Access Level is based on a combination of User Type and Role/Permissions.

Once the Provider Administrator submits a request a popup window as shown below will be displayed stating that your request has been submitted. The user will receive an email notification, once the Administrator approves their User Access.

User Types Hierarchy

1. **System Administrator** – Only System Administrators can Approve/Deny a Provider Administrator’s Access Request Form or they can go to Create User Screen, to create a Provider Administrator.
2. **Provider Administrator (Physician Administrator, Facility Administrator, Vendor Administrator, or IPA Administrator)** – There can only be one (1) Provider Administrator per NPI/Tax ID. Only the Provider Administrator can complete the Request Access Form (login screen)
3. **Provider Authorized Users (Physician Auth. User, Facility Auth. User, Vendor Auth. User, and IPA Auth. User)** – Only the Provider Administrators can create a Provider Authorization User account, for their respective NPI/Tax ID. A Provider Authorized User would need to reach out to their designated Provider Administrator to request a user account.

Administration Module

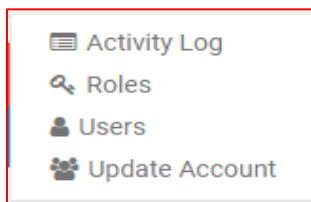
The administration module allows users with administrative privileges to manage user accounts in the Provider Portal. The user will have access to create, terminate or update a user level account details.

Accessing the Administration Module

Once logged into the system, select Administration dropdown list from the dashboard.



The dropdown list for the Administration Module contains the following selections.

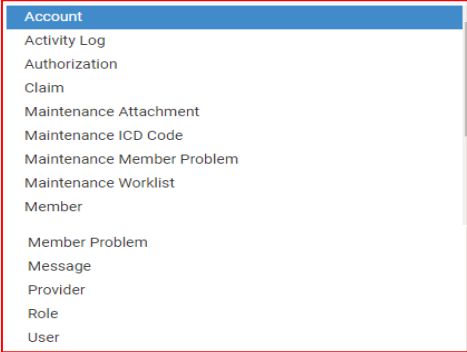



Activity Log

The Activity Log sub module allows users with administrator privileges full access to search and view user activities in the system.

Activity Log Screen

Field Names	Search Activity Log Section – Field Descriptions			
Q Search Activity Log				
Role Area	Action	User Name		
Select an Option	Select an Option	User Name		
First Name	Last Name	From Date	To Date	
First Name	Last Name	Select Date	Select Date	
Q SEARCH RESET				

<p>Role Area</p>	<p>The Role Area field allows users to select a role area from the dropdown list as part of the search criteria. Choices are:</p> 
<p>Action</p>	<p>The Action field allows users to select an action from the dropdown list as part of the search criteria. Choices are:</p> 
<p>User Name</p>	<p>The User Name field allows users to enter and search by the user name.</p>
<p>First Name</p>	<p>The First Name field allows users to enter and search by a user's First Name.</p>
<p>Last Name</p>	<p>The Last Name field allows users to enter and search by a user's Last Name.</p>
<p>From Date</p>	<p>The From Date field allows users to select the from date using the calendar feature or by manually keying the date in as follows:</p> <ul style="list-style-type: none"> • MM/DD/YYYY
<p>To Date</p>	<p>The To Date field allows users to select the from date using the calendar feature or by manually keying the date in as follows:</p> <ul style="list-style-type: none"> • MM/DD/YYYY
<p>Search</p>	<p>The Search button allows the user to launch the Activity Log search based on the criteria selected. The results table will be populated below with the respective data fields selected. Note: Clicking Search with no search criteria will return all results.</p>

Search Result - 3					
User Name	Action Type	Area Name	Message	Log Date	User Status
admin	View	Member	Member detail having member number AH0003 is viewed by admin.	06/05/2017 01:13 PM	Active
admin	View	Member	Member detail having member number MC1000542 is viewed by admin.	06/05/2017 01:10 PM	Active
admin	Search	Member	Member search is performed by admin with search criteria none.	06/05/2017 01:10 PM	Active

Roles

The Roles sub module allows users to view, add, edit, or delete user role permissions.

Note: Navigation throughout the portal will be based on a user's role permissions.

Roles Screen

Field Names **Search Role Section – Field Descriptions**

Q Search Role
+ ADD NEW ROLE

Name	Description	Last Modified Date	Add By	Last Modified By
Test	test oencal	06/05/2017 5:16 PM	admin	
Authorization	Authorization	05/18/2017 2:13 PM	admin	admin
Admin	Base Admin Account	04/06/2017 12:10 PM		

Search Role

The **“Search Role”** fields allow users to enter the Name, Description, Last Modified Date, Add by, and Last Modified to perform a search. The results will be displayed under the entry fields with the respective data fields selected.

Ex: Name= Admin

Q Search Role
+ ADD NEW ROLE

Name	Description	Last Modified Date	Add By	Last Modified By
<input type="text" value="admin"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Admin	Base Admin Account	04/06/2017 12:10 PM		

Roles Screen

Field Names

Add New Role Section – Field Descriptions

Note: To access this screen, the user must click the “Add New Role” button from the search role screen



Search Role + ADD NEW ROLE

Create New Role

Name **Description**
Required

Select Permissions

Account	READ UPDATE ALL
Activity Log	READ
Authorization	CREATE READ UPDATE EXPORT/PRINT EXTENSION REQUEST MOD REQUEST APPEAL ALL
Claim	CREATE READ UPDATE EXPORT/PRINT MOD REQUEST APPEAL ALL
Maintenance Attachment	CREATE READ DELETE ALL
Maintenance ICD Code	CREATE READ UPDATE DELETE ALL
Maintenance Member Problem	READ DELETE ALL
Maintenance Worklist	CREATE READ UPDATE DELETE ALL

SUBMIT
RESET

Create New Role	The Create New Role screen allows users with administrator privileges to create a new user role with selected permissions.
Submit	The Submit button allows the users to submit the permissions select for creating a new role setting.
Reset	The Reset button allows users to clear all data from the fields prior to saving.


Users


The Users sub module allows System Administrators access to view, edit, or delete provider access requests.

Once the provider's access request is submitted, the Provider Administrator will be allowed to set up the provider's role settings.

Users Screen

Field Names
Search Role Section – Field Descriptions

 **Provider Access Request**

User Name	First Name	Last Name	Middle Name	Access Level	Email	Phone Number	Extension	User Type	NPI	Tax ID	Company Name	Requested Date
 admin.test	Test	Test		Authorization, Claim				Provider	1811176480			04/26/2017 3:29 PM

Q Search Users + ADD NEW USER

User Name

User Type

First Name

Company Name

Last Name

NPI

Role

Tax ID

Email



LOB

Phone Number

IPA

Q SEARCH
↻ RESET

Q Search Result - 2

User Name	First Name	Last Name	Middle Name	Role	Email	Is Email Verified	Phone Number	User Type	NPI	Tax ID
 Testcencal	Test	Cencal		Admin	cencal@healthaxis.com	No		Provider	1861722134	
 gsurat	Greg	Surat		Admin	gsurat@bea conh.com	Yes	8135066000	Admin		

Provider Access Request

Once a **Provider's Request** has been submitted. The request will appear under the Provider Access Request section as seen below. The **System Administrator** can either approve or deny the request.

 **Provider Access Request**

User Name	First Name	Last Name	Middle Name	Access Level	Email	Phone Number	Extension	User Type	NPI	Tax ID	Company Name	Requested Date
 admin.test	Test	Test		Authorization, Claim				Provider	1811176480			04/26/2017 3:29 PM

Search Users

Once the request has been approved by the System Administrator. The Provider Administrator can search a user by a user name, first name, last name, role, email, phone number, user type, company name, NPI, Tax ID, LOB, or IPA. The results table will be populated below with the respective data fields selected.

The screenshot shows a search interface with a green header bar containing a magnifying glass icon, the text "Search Users", and a "+ ADD NEW USER" button. Below the header are two rows of input fields. The first row includes: "User Name" (text input), "First Name" (text input), "Last Name" (text input), "Role" (text input with "Role Name" placeholder), "Email" (text input), and "Phone Number" (text input with "() - " placeholder). The second row includes: "User Type" (dropdown menu with "Select an Option"), "Company Name" (text input with "Company Name" placeholder), "NPI" (text input with "NPI" placeholder), "Tax ID" (text input with "Tax ID" placeholder), "LOB" (text input with "Select Some Options" placeholder), and "IPA" (text input with "Select Some Options" placeholder). At the bottom left are two buttons: a green "SEARCH" button and a red "RESET" button.

Search Result




The **Search Result** section allows the Provider Administrator to view the results of a search.

The screenshot shows a table titled "Search Result" with a blue header. The table has the following columns: User Name, First Name, Last Name, Middle Name, Role, Email, Is Email Verified, Phone Number, User Type, NPI, Tax ID, and Last Modified Date. There are three rows of data, each with a trash icon on the left.

User Name	First Name	Last Name	Middle Name	Role	Email	Is Email Verified	Phone Number	User Type	NPI	Tax ID	Last Modified Date
Testcencal	Test	Cencal		Admin	cencal@healthaxis.com	No		Provider	1861722134		06/05/2017 6:42 PM
gsurat	Greg	Surat		Admin	gsurat@beaconh.com	Yes	8135066000	Admin			05/23/2017 11:09 AM
CenCal	Cencal	Test		Admin	neha.surendranath@healthaxis.com	Yes		Provider	1861722134		05/22/2017 3:23 PM

Update Account

The Update Account sub module allows users to setup and update screen settings.

Update Account Screen	
Field Names	Update Account Section – Field Descriptions
	
Theme	<p>The Theme fields allow users to select a background theme/color for the screen. Choices are:</p> <div style="border: 1px solid red; padding: 5px; width: fit-content;"> <ul style="list-style-type: none"> Default Meterial Solar Slate Superhero Yeti </div>
Account Name	The Account Name field allows users to enter the name of the account.
Logo	<p> The Logo field allows users to change the screen logo, by using the “choose file” button (shown above. Once a file has been selected it will be displayed in the field.</p> <p>Note: Required Field</p> <p> The red X (shown left) will clear the selected file.</p>
Contact Email	The Contact Email field allows users to enter a contact email for system issues.
Contact Phone	The Contact Phone field allows users to enter a contact phone number for system issues. Note: Required Field
Grace Period	The Grace Period field allows users to enter a period of how long a member’s eligibility information will be viewable after termination.
Announcement	The Announcement field allows users to enter a system announcement. Ex: System will be down for maintenance.
Terms of Use	The Terms of Use field allows users to enter a disclaimer for use of the site.

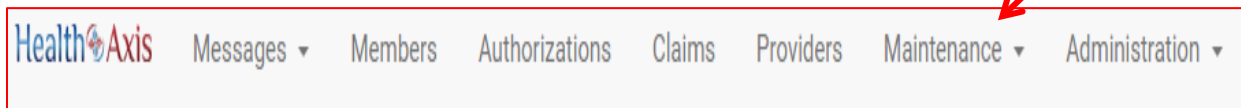
Privacy Policy	The Privacy Policy field allows users to enter a privacy policy for use of the site.
Submission Guidelines for Authorization Appeal	This Submission Guidelines for Authorization Appeal field allows users to enter personalized guidelines for submission of authorization appeals.
Submission Guidelines for Claim Appeal	This Submission Guidelines for Claim Appeal field allows users to enter personalized guidelines for submission of claim appeals.
Submit	The Submit button allows users to save the information entered.

Maintenance Module

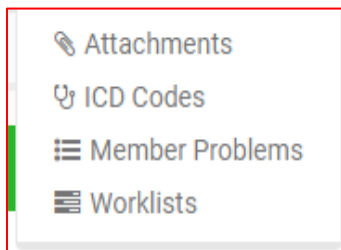
The Maintenance Module allows users to maintain the attachments, ICD codes, search member issues, and create worklist.

Accessing the Maintenance Module

Once logged into the system, select Maintenance dropdown list from the dashboard.



The dropdown list for the Maintenance Module contains the following selections.



Attachments

The Attachments sub module allows users to search and upload attachments for authorizations, claims, members or providers.

Attachment Screen

Field Names | **Search Attachments Section – Field Descriptions**


A screenshot of the 'Attachment Screen' in the system. The page has a header with 'Attachment Screen' on the left and 'Search Attachments Section – Field Descriptions' on the right. Below the header is a search and upload interface. At the top left, there is a search icon and the text 'Search Attachments'. To its right is an 'Upload Attachments' button with a plus icon. Below this, there are several input fields: a 'Type' dropdown menu with 'Select an Option' and a 'Q FIND' button; a 'Category' dropdown menu with 'Select an Option'; and an 'Upload Date From' field with the date '06/01/2017'. Below these fields is a large text area for 'Description'. At the bottom left, there are two buttons: a green 'Q SEARCH' button and a red 'RESET' button.

Type

The **Type** field allows users to select a specific type from the dropdown list as part of the search criteria. Choices are:

Authorization
Claim
Member
Provider

Find Button

 Once a type is selected, the user can click the Find button (shown left) to search all authorization, claims, members, or providers. (Based on the type selected) Upon clicking the Find button the Search screen will appear as a pop-window (shown below)

Member Search Double click on row to select member. x

Search By: Search for: HICN Number: Member DOB:

Health Plan: Line Of Business: Benefit Plan: IPA:

Search Result - 116

Name	Member ID	DOB	Phone Number	Eff Date	Term Date	PCP	Health Plan	LOB	Benefit Plan	IPA	Benefit ID
<input checked="" type="checkbox"/> Abraham, Lucas	MC1000048	12/12/1980	(000)000-0000	02/15/2017	02/15/2019	Assignment, General	Blue Cross	Medical	Plan MA2	Preferred Ipa	MA2
<input checked="" type="checkbox"/> Accucheck, Accucheck	MC1000542	10/25/1988	(746)135-1321	01/01/2015	12/31/2017	Dhaval, Patel	Blue Cross	Medical	Plan MA2	Preferred Ipa	MA2

Note: Users can narrow the search results by entering specific search criteria and clicking search.

Once the search results are returned they will appear below the search section. Upon double clicking on the row to the selected result, the search result will be populated in the search attachment screen.

Search Attachments

Type:

Category: Upload Date From:

Description:

Upon clicking the search button, the result will be displayed below the search attachment section.

Type	Category	File Name	Description	Date	Uploaded By
<input checked="" type="checkbox"/> Member	Test for Provider Portal	Test.docx	test	06/06/2017 3:39 PM	PortalUser

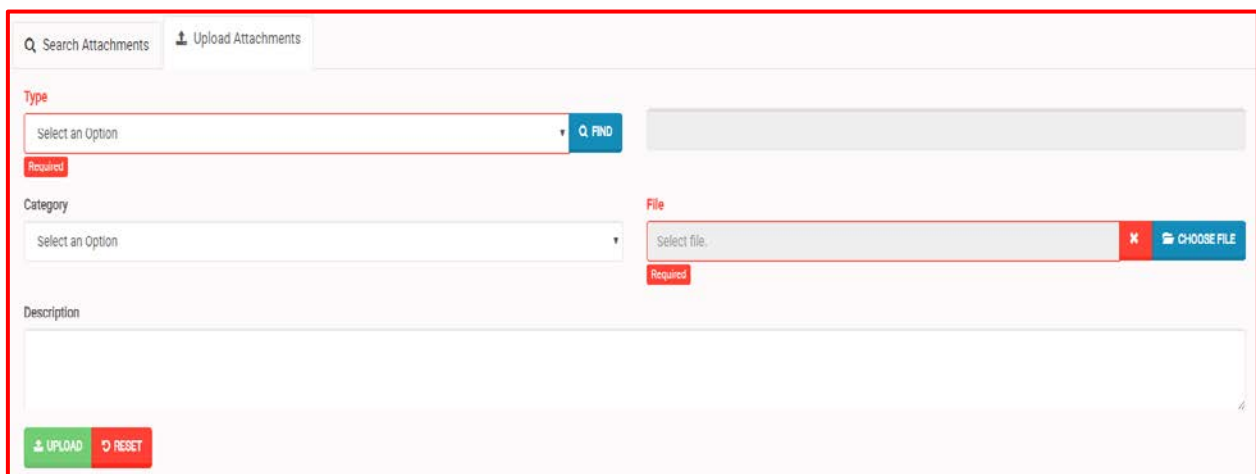
User can then click the file name to view the attachment.

Category	<p>The Category field allows users to select the category type from the dropdown list as part of the search criteria. Choices are:</p> <div style="border: 1px solid red; padding: 5px;"> <p>Select an Option</p> <p>Attachment Category8</p> <p>Test for Provider Portal</p> </div>
Upload Date From	<p>The Upload Date From field allows users to select the upload date of the attachment as part of the search criteria, by either using the calendar, or manually entering the date in the following format.</p> <ul style="list-style-type: none"> • MM/DD/YYYY
Description	<p>The Description field allows users to enter the description of the attachment as part of the search criteria.</p>
Search	<p>The Search button allows users to launch the Search Attachment functionality based on the criteria selected. The results will populate below the search attachment section.</p> <p>Note: Clicking Search with no search criteria will return all results.</p>
Reset	<p>The Reset button allows users to clear data from the search criteria fields.</p>


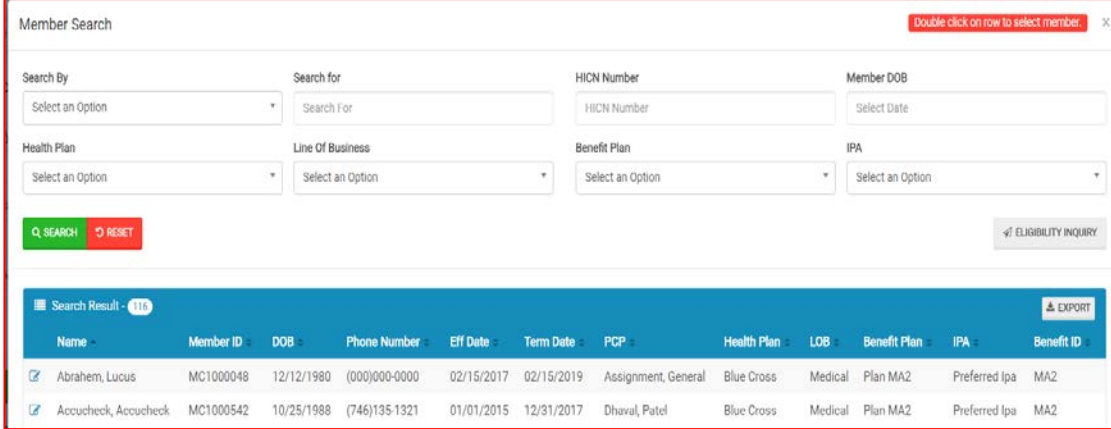
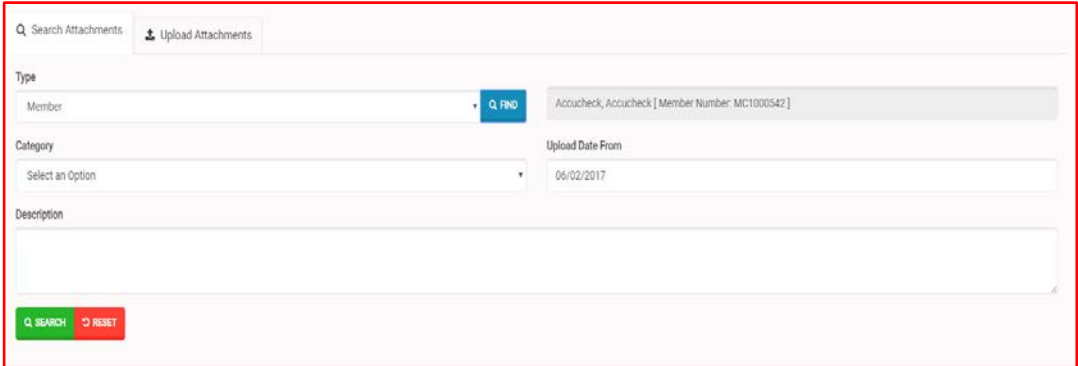
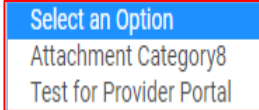


Attachment Screen

Field Names

Upload Attachments Section – Field Descriptions



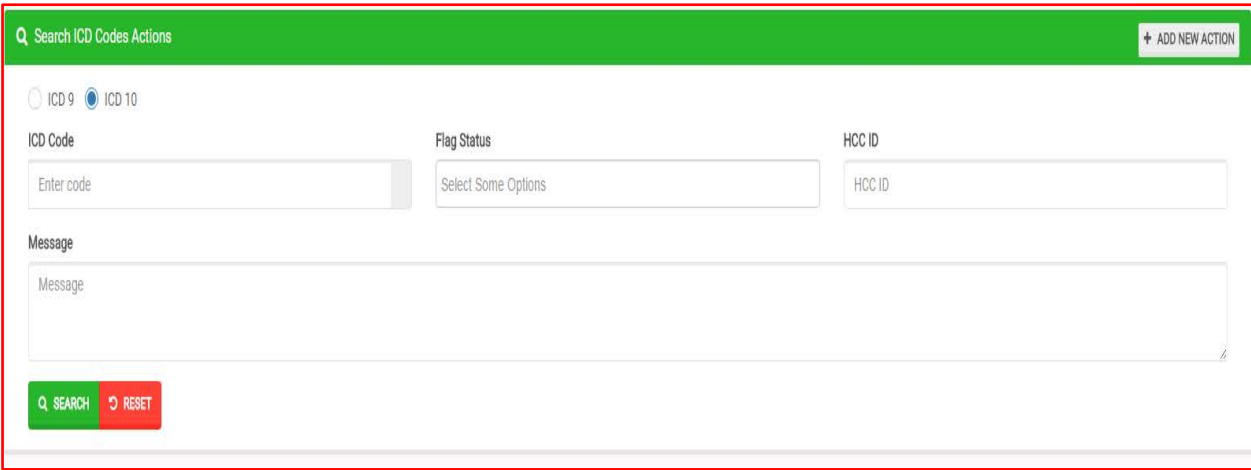
Type	<p>The Type field allows users to select a specific type from the dropdown list for the type of attachment to be uploaded. Choices are:</p> <div style="border: 1px solid red; padding: 5px;"> <p>Authorization</p> <p>Claim</p> <p>Member</p> <p>Provider</p> </div> <p>Note: Required Field</p>
------	---


<p>Find Button</p>	<p> FIND</p> <p>Once a type is selected, the user can click the Find button (shown left) to search all authorization, claims, members, or providers. (Based on the type selected) Upon clicking the Find button the Search screen will appear as a pop-window (shown below)</p>  <p>Note: Users can narrow the search results by entering specific search criteria and clicking search.</p> <p>Once the search results are return they will appear below the search section. Upon double clicking on the row to the selected result, the search result will be populated in the search attachment screen.</p> 
<p>Category</p>	<p>The Category field allows users to select the category type from the dropdown list for the uploaded attachment. Choices are:</p> 
<p>File</p>	<p> CHOOSE FILE</p> <p>The File field allows users to choose a file to be attached by clicking the “choose file” button (shown above). Once a file has been selected it will be displayed in the field.</p> <p>Note: Required Field</p>  The red X (shown left) will clear the selected file.

Description	The Description field allows users to enter the description of the attachment to be uploaded.
Upload	The Upload button allows users to import the selected file.
Reset	The Reset button allows users to clear data from the search criteria fields.

ICD Codes

The ICD Codes sub module allows users to search and create ICD9 and ICD10 codes actions.

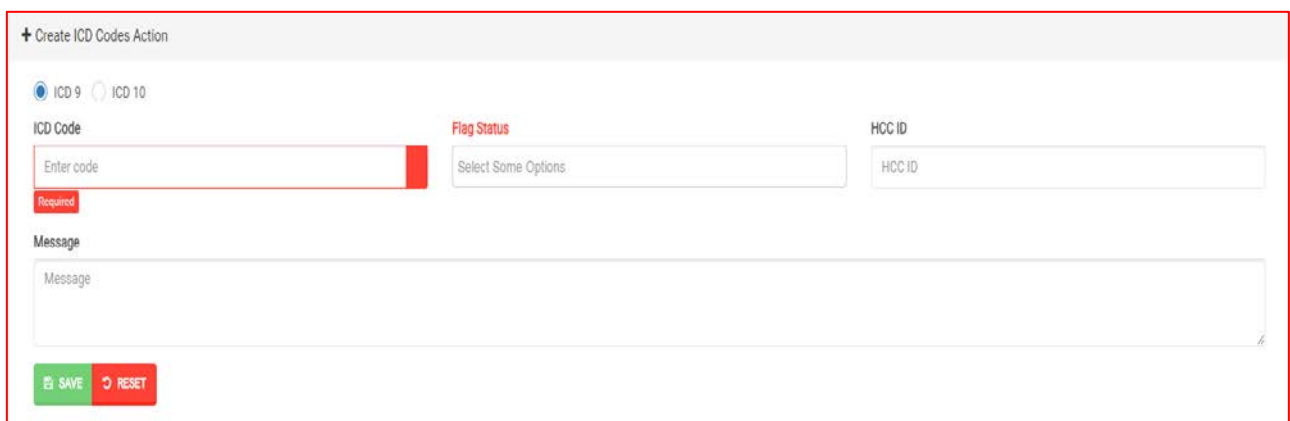
ICD Codes Screen	
Field Names	Search ICD Codes Actions Section – Field Descriptions
	
ICD 9	The ICD 9 radio button allows users to search ICD9 code actions based on the specific search criteria selected.
ICD 10	The ICD 10 radio button allows users to search ICD 10 code actions based on the specific search criteria selected.
ICD Code	The ICD Code field allows users to enter an ICD9 or ICD 10 (based on radio button selected) as part of the search criteria.
Flag Status	The Flag Status field allows users to select a flag status from the dropdown list as part of the search criteria. Choices are: <div data-bbox="375 1545 721 1789" style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <ul style="list-style-type: none"> HCC/RAF Star Rating Show Alternates in HCC Group Do Not Allow Display Message </div>
HCC ID	The HCC Id field allows users to enter a HCC Id as part of the search criteria.
Message	The Message field allows users to enter a message as part of the search criteria.

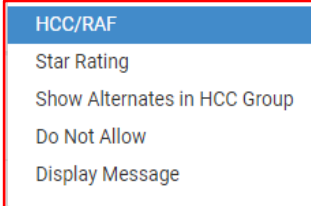
Search	The Search button allows users to launch the Search ICD 9/ICD 10 functionality, based on the criteria selected. The results will populate below the search section. Note: Clicking Search with no search criteria will return all results.
Reset	The Reset button allows users to clear data from the search criteria fields.
Add New Action	 The Add New Action button (shown left) allows users to create a new ICD 9 or ICD 10 codes action based on radio button selected.

ICD Codes Screen

Field Names

Create ICD Codes Actions Section – Field Descriptions



ICD 9	The ICD 9 radio button allows users to create an ICD9 code action.
ICD 10	The ICD 10 radio button allows users to create an ICD 10 code action.
ICD Code	The ICD Code field allows users to enter an ICD9 or ICD 10 (based on radio button selected) for the new ICD Code being created. Users can type in the field or click the field to select a code from the dropdown list. Note: Required Field
Flag Status	The Flag Status dropdown list allows users to enter or select the flag status of the new ICD Code being created. Choices are: 
HCC ID	The HCC Id field allows users to enter a HCC Id of the new ICD Code being created.
Message	The Message field allows users to enter a message for the new ICD Code being created.
Save	The Save button allows users to store the newly created ICD Code Action.
Reset	The Reset button allows users to clear all data from the fields prior to saving.

Member Problems

The Member Problem sub module allows users to search a specific member’s problem/issue.

Member Problems Screen

Field Names **Search Member Problems Section – Field Descriptions**

Q Search Member Problems

Member

Member Deactive Only?

Required

Member	<div style="text-align: right;"><input type="button" value="Q FIND"/></div> <p>The Member field allows users to search for a member using the “Find” button.</p> <p>Note: Required field.</p> <p>When users click the “Find” button a Search Member popup window will appear. The window will display member search criteria at the top and the search results at the bottom. The users can enter specific search criteria to narrow search results. Upon double clicking the row of the selected member, the member name will be populated in the Member field of the Search Member Problems screen. Note: See Member Module Section.....</p> <div style="border: 1px solid red; padding: 5px; margin: 5px 0;"> <p>Member Search Double click on row to select member</p> <p>Search By: <input type="text" value="Select an Option"/> Search for: <input type="text" value="Search For"/> HICN Number: <input type="text" value="HICN Number"/> Member DOB: <input type="text" value="Select Date"/></p> <p>Health Plan: <input type="text" value="Select an Option"/> Line Of Business: <input type="text" value="Select an Option"/> Benefit Plan: <input type="text" value="Select an Option"/> IPA: <input type="text" value="Select an Option"/></p> <p><input type="button" value="Q SEARCH"/> <input type="button" value="RESET"/> ELIGIBILITY INQUIRY</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr style="background-color: #0070c0; color: white;"> <th colspan="12">Search Result - 3</th> <th style="text-align: right;"><input type="button" value="EXPORT"/></th> </tr> <tr> <th>Name</th> <th>Member ID</th> <th>DOB</th> <th>Phone Number</th> <th>Eff Date</th> <th>Term Date</th> <th>PCP</th> <th>Health Plan</th> <th>LOB</th> <th>Benefit Plan</th> <th>IPA</th> <th>Benefit ID</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Abraham, Lucas</td> <td>MC1000048</td> <td>12/12/1980</td> <td>(000)000-0000</td> <td>02/15/2017</td> <td>02/15/2019</td> <td>Assignment, General</td> <td>Blue Cross</td> <td>Medical</td> <td>Plan MA2</td> <td>Preferred ipa</td> <td>MA2</td> </tr> <tr> <td><input checked="" type="checkbox"/> Accucheck, Accucheck</td> <td>MC1000542</td> <td>10/25/1988</td> <td>(746)135-1321</td> <td>01/01/2015</td> <td>12/31/2017</td> <td>Dhaval, Patel</td> <td>Blue Cross</td> <td>Medical</td> <td>Plan MA2</td> <td>Preferred ipa</td> <td>MA2</td> </tr> <tr> <td><input checked="" type="checkbox"/> Addepalli, Mohan</td> <td>MC1000032</td> <td>07/21/1998</td> <td>000-000-0000</td> <td>01/02/2015</td> <td></td> <td>Larson, Desi</td> <td>Blue Cross</td> <td>Medical</td> <td>Medi-CAL2015</td> <td>Preferred ipa</td> <td>MC2015</td> </tr> </tbody> </table> </div>	Search Result - 3												<input type="button" value="EXPORT"/>	Name	Member ID	DOB	Phone Number	Eff Date	Term Date	PCP	Health Plan	LOB	Benefit Plan	IPA	Benefit ID	<input checked="" type="checkbox"/> Abraham, Lucas	MC1000048	12/12/1980	(000)000-0000	02/15/2017	02/15/2019	Assignment, General	Blue Cross	Medical	Plan MA2	Preferred ipa	MA2	<input checked="" type="checkbox"/> Accucheck, Accucheck	MC1000542	10/25/1988	(746)135-1321	01/01/2015	12/31/2017	Dhaval, Patel	Blue Cross	Medical	Plan MA2	Preferred ipa	MA2	<input checked="" type="checkbox"/> Addepalli, Mohan	MC1000032	07/21/1998	000-000-0000	01/02/2015		Larson, Desi	Blue Cross	Medical	Medi-CAL2015	Preferred ipa	MC2015
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Worklist

The Worklist sub module allows users to assign and create worklist to users.

Maintenance Worklist Screen

Field Names

Maintenance Worklist Screen Section – Field Descriptions

The screenshot shows the 'Maintenance Worklist' interface. It features two input fields: 'Worklist Name' with a 'Name' placeholder and a 'Required' label, and 'Assign Users' with a 'Select Some Options' placeholder and a 'Required' label. Below these fields are 'UPDATE' and 'RESET' buttons. A table below displays a single entry with the following data:

Worklist Name	Users	Last Modified By	Last Modified Date
test	admin	admin	06/06/2017 05:14 PM

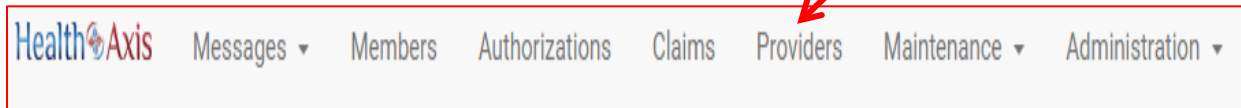
Worklist Name	The Worklist Name field allows users to enter the name of the worklist to be assigned. Note: Required Field.
Assign Users	The Assign Users field allows users to assign multiple users to a worklist. Note: Required Field.
Update	The Update button allows users to store newly created worklists. The results will appear below the Maintenance Worklist section.
Reset	The Reset button allows users to clear all data from the fields prior to saving.

Provider Module

The Provider Module allows users search providers using specific search criteria.

Accessing the Provider Module

Once logged into the system, select Provider from the dashboard.



Provider Search

Upon clicking the Provider Module, the Provider Search Popup Window will appear.

Provider Search Screen

Field Names	Provider Search Section – Field Descriptions
<div style="border: 1px solid red; padding: 10px; margin-bottom: 10px;"> <p>Provider Search Double click on row to select provider. X</p> <p>Search By: <input type="text" value="Select an Option"/></p> <p>Search for: <input type="text" value="Search Query"/></p> <p>City: <input type="text" value="City"/> Zip Code: <input type="text" value="Zip"/></p> <p>Specialty: <input type="text" value="Select an Option"/> Locality: <input type="text" value="Select an Option"/></p> <p>Health Plan: <input type="text" value="Select an Option"/> Line Of Business: <input type="text" value="Select an Option"/> IPA: <input type="text" value="Select an Option"/></p> <p><input checked="" type="radio"/> Par Provider <input type="radio"/> All (Par and Non-par)</p> <p>SEARCH RESET</p> </div>	<p>The Search By field contains a dropdown list that can be utilized to narrow down a search to only display providers with specific criteria. Choices are:</p> <p>Ex: Last Name</p> <div style="border: 1px solid red; padding: 5px; margin-top: 5px;"> <ul style="list-style-type: none"> <li style="background-color: #0056b3; color: white; padding: 2px;">Last, First <li style="padding: 2px;">Last Name <li style="padding: 2px;">First Name <li style="padding: 2px;">License Number <li style="padding: 2px;">TIN <li style="padding: 2px;">Provider Number <li style="padding: 2px;">Organization Name </div>

Search For	The Search For fields corresponds to the selection chosen in the <i>Search By</i> field. EX: Smith NOTE: An entry is required in this field, if a selection is made in the “search by” field.
City	The City field allows users to enter the city as part of the search criteria.
Zip Code	The Zip Code field allows users to enter the zip code as part of the search criteria.
Specialty	The Specialty dropdown list allows users to select a specialty as part of the search criteria.
Locality	The Locality dropdown list allows users to select a locality as part of the search criteria.
Health Plan	The Health Plan dropdown list allows users to select a health plan as part of the search criteria.
Line of Business	The Line of Business dropdown list allows users to select a LOB as part of the search criteria.
IPA	The IPA dropdown list allows users to select an IPA as part of the search criteria.
Par Provider	The Par Provider radio button allows users to select only Par providers as part of the search criteria.
All (Par and Non-par)	The All radio button allows users to select both Par and Non-Par providers as part of the search criteria.
Search	The Search button allows users to launch the Provider Search functionality based on the criteria selected. The results table will populate below with the respective data fields selected. Note: Clicking Search with no search criteria will return all results.
Reset	The Reset button allows users to clear all data from the fields prior to saving.

Provider Search Screen

Field Names

Provider Results Section – Field Descriptions

Is Par?	Name	Number	Health Plan	LOB	IPA	Network	Eff Date	Term Date	Address	Phone	TIN	NPI	Specialty
<input checked="" type="checkbox"/>	Yes	Smith Primary Care	P00000004	Blue Cross	MediCal	California Medical Center	Aetna Network	11/01/2015	Address line 1 LONG BEACH, CA 90803	000-000-0000	213123123	1003017633	ABC, Cardiolog
<input checked="" type="checkbox"/>	Yes	Smith Primary Care	P00000004	Blue Cross	MediCal	California Medical Center	Vision Network	01/01/2015	Address line 1 LONG BEACH, CA 90803	000-000-0000	213123123	1003017633	ABC, Cardiolog
<input checked="" type="checkbox"/>	Yes	Smith Primary Care	P00000004	Blue Cross	MediCal	California Medical Center	Dipa MOD1	01/01/2015	Address line 1 LONG BEACH, CA 90803	000-000-0000	213123123	1003017633	ABC, Cardiolog
<input checked="" type="checkbox"/>	Yes	Smith Primary Care	P00000004	Blue Cross	MediCal	Hollywood Presbyterian	Aetna Network	01/01/2015	Address line 1 LONG BEACH, CA 90803	000-000-0000	213123123	1003017633	ABC, Cardiolog
<input checked="" type="checkbox"/>	Yes	Smith Medical	P00000003	Blue Cross	MediCal	California Medical Center	Vision Network	01/01/2015	Address line 1 TAMPA, FL 33614	000-000-0000	123456789	1212121212	Dentist
<input checked="" type="checkbox"/>	Yes	Smith Medical	P00000003	Blue Cross	MediCal	Citrus Valley Partners	Vision Network	07/01/2015	Address line 1 TAMPA, FL 33614	000-000-0000	123456789	1212121212	Dentist
<input checked="" type="checkbox"/>	Yes	Smith Medical	P00000003	ACME Health Plan	ACMEDUAL	RIOTAP POD1	RIOTAP NETWORK	05/22/2017	Address line 1 TAMPA, FL 33614	000-000-0000	123456789	1212121212	Dentist

Search Results	The Search Results heading tells the users how many records are displayed in the results table.
Export	The Export button allows the user to export the results data into an excel format.
Results Table	The Results Table is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order; click the errors next to the header. (as shown below)

Provider Information

Upon double clicking on the selected provider from the grid, the provider information will populate into the provider information screen. The user can now view the Provider Information and the Provider Assignment Details.

Note: Each section can be collapsed for easier viewing. This section is for review only, users will not be allowed to edit.

Provider Information Screen

Provider Information Section

Provider Information
▼

Provider ID	Degree	Salutation	Suffix	Gender	Organization Name
P00003028	MRA Degree				HealthAxis Clinic
Last Name		First Name		Middle Name	
Patel		Pooja		J	
Address 1	Address 2	City	State	Zip Code	
45451 w green st		Tampa	FL	33613	
National Provider ID	Taxonomy ID	Tax ID	Language	Phone	Fax
1125588999				(815) 454-1121	

The Provider Information section allows the users to view the demographics of the Provider.

Provider Information Screen

Provider Assignment Section

Provider Assignment
▼

Assignment Plan ID	Line of Business	IPA	Network	Billing Address	City, State & Zip	Type	Effective Date	Term Date	Status
PA201706071105227731227888	MediCal	Preferred IPA	Aetna Network			PCP	06/01/2017		Active

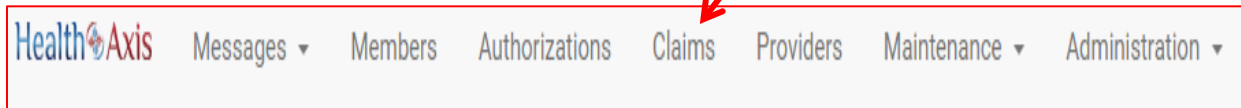
The Provider Assignment section allows users to view the provider assignment plans.

Claim Module

The Claim Module allows users to search claims using specific search criteria.

Accessing the Claim Module

Once logged into the system, select Claim from the dashboard



Search Claim

Upon clicking the Claims Module, the Search Claim Popup Window will appear.

Claim Screen

Field Names	Search Claim Section – Field Descriptions
--------------------	--







Q Search Claim ▼

Claim Number <input type="text" value="Claim Number"/>	Member <input type="text" value="Hill, Mary"/> Q FIND	Claim Status <input type="text" value="Select Some Options"/>	Payment Status <input type="text" value="Select an Option"/>
HICN Number <input type="text" value="HICN Number"/>	Member DOB <input type="text" value="Select Date"/>	LOB <input type="text" value="Select an Option"/>	IPA <input type="text" value="Select an Option"/>
Svc Date From <input type="text" value="Select Date"/>	Svc Date To <input type="text" value="Select Date"/>	Ordering Provider <input type="text" value="Ordering Provider"/> Q FIND	Requested Provider <input type="text" value="Requested Provider"/> Q FIND

Institutional Claim
 Professional Claim
 CHDP Claim

Q SEARCH
RESET

Claim Number	The Claim Number field allows the user to enter the claim number as part of the search criteria.
Member	<div style="display: flex; align-items: center; margin-bottom: 5px;"> Q FIND </div> The Member field allows the user to enter the member’s name (Last Name, First Name) or click the Find button (shown to the left) to select the member from the Member Search popup window as part of the search criteria.
Claims Status	The Claims Status dropdown list allows users to select the claim status from the dropdown list as part of the search criteria.
Payment Status	The Payment Status dropdown list allows users to select the payment status as part of the search criteria.
HICN Number	The HICN Number field allows users to enter the HICN Number as part of the search criteria.

Member DOB	The Member DOB date field allows users to select the Member’s DOB using the calendar feature or by manually keying the member’s DOB in as follows: <ul style="list-style-type: none"> MM/DD/YYYY 																												
LOB	The LOB dropdown list allows users to select the LOB as part of the search criteria.																												
IPA	The IPA dropdown list allows users to select the IPA as part of the search criteria.																												
Svc Date From	The Svc Date From field allows users to select the svc date from using the calendar feature or by manually keying the date in as follows: <ul style="list-style-type: none"> MM/DD/YYYY 																												
Svc Date To	The Svc Date To field allows users to select the svc date to using the calendar feature or by manually keying the date in as follows: <ul style="list-style-type: none"> MM/DD/YYYY 																												
Ordering Provider	 The Ordering Provider field allows users to enter the name of the ordering provider (Last Name, First Name) or click the Find button (shown to the left) to select the provider from the Provider Search popup window as part of the search criteria.																												
Requested Provider	 The Requested Provider field allows users to enter the name of the requested provider (Last Name, First Name) or click the Find button (shown to the left) to select the provider from the Provider Search popup window as part of the search criteria.																												
Institutional Claim	The Institutional Claim check box allows users to select only institutional claims as part of the search criteria.																												
Professional Claim	The Professional Claim check box allows users to select only professional claims as part of the search criteria.																												
CHDP Claim	The CHDP Claim check box allows users to select only CHDP claims as part of the search criteria.																												
Search	The Search button allows users to launch the Claim Search functionality based on the criteria selected. The results table will populate below with the respective data fields selected. Note: Clicking Search with no search criteria will return all results.																												
Reset	The Reset button allows users to clear all data from the fields prior to saving.																												
Claim Screen																													
Field Names	Claims Results Section – Field Descriptions																												
 <p>The screenshot shows a table with the following data:</p> <table border="1"> <thead> <tr> <th>Claim Number</th> <th>Status</th> <th>U/H</th> <th>Date Of Service</th> <th>Orig Rcvd Date</th> <th>Member</th> <th>Requested Provider</th> <th>Vendor</th> <th>Health Plan</th> <th>LOB</th> <th>IPA</th> <th>PBP</th> <th>Net Payment</th> <th>Last Modified Date</th> </tr> </thead> <tbody> <tr> <td> 2017051700045564</td> <td>AA-Pend</td> <td>Professional</td> <td>05/15/2017</td> <td>05/15/2017</td> <td>Hill, Mary</td> <td>Hayes, Robert</td> <td>Robert Hayes</td> <td>Blue Cross</td> <td>Medical</td> <td>Preferred Ipa</td> <td>MC2015</td> <td>\$50.00</td> <td>05/17/2017 12:39 PM</td> </tr> </tbody> </table>		Claim Number	Status	U/H	Date Of Service	Orig Rcvd Date	Member	Requested Provider	Vendor	Health Plan	LOB	IPA	PBP	Net Payment	Last Modified Date	 2017051700045564	AA-Pend	Professional	05/15/2017	05/15/2017	Hill, Mary	Hayes, Robert	Robert Hayes	Blue Cross	Medical	Preferred Ipa	MC2015	\$50.00	05/17/2017 12:39 PM
Claim Number	Status	U/H	Date Of Service	Orig Rcvd Date	Member	Requested Provider	Vendor	Health Plan	LOB	IPA	PBP	Net Payment	Last Modified Date																
 2017051700045564	AA-Pend	Professional	05/15/2017	05/15/2017	Hill, Mary	Hayes, Robert	Robert Hayes	Blue Cross	Medical	Preferred Ipa	MC2015	\$50.00	05/17/2017 12:39 PM																
Export	The Export button allows the user to export the results data into an excel format.																												

Claims Review Screen

Upon double clicking on the selected claim from the grid, the claim review screen will be displayed. The user will be allowed to view the details of the member’s claim selected.

The claims review screen consists of the following collapsible sections: member’s information, member’s current coverage, claim header, provider or facility information, claim process detail, claim details, coordination of benefits, attachments, authorization information, anesthesia, ambulance, and check details.


Note: Each section can be collapsed for easier viewing. This section is for review only, users will not be allowed to edit.

Claims Review Screen

Member Information Section

Note: The appeal button allows users to appeal the claim. Upon clicking the appeal button, a popup window will appear. (the Claim Appeal button will be explained in more detail following the Claims Review Section)

Claim - 2017061200045817

[APPEAL](#) 

Member Information
▼

Salutation	Last Name	First Name	Middle Name	Suffix	Status
	Star	Indian		.Jr	M01 - Active Member
Member ID	CIN Number	Date of Birth	Age	Gender	Marital Status
AH0003	655555555555555576665	01/01/2012	5	Female	Single
Phone	Home Phone	Work Phone	Cell Phone	Fax	Email Address
(546)576-5877	(767)676-7676	(546)433-3356	(566)666-6666	(454)545-4545	
Primary Language	Employment	Emergency Contact	Emergency Phone	Address	
English	Full Time	Star Father	454-545-4545	Hillsborough road, tampa, FL 33626	

The member information section allows users to view the member’s demographic information.

Claims Review Screen

Current Coverage Section

Current Coverage

Health Plan Access dental plan	Line Of Business Alliedhealth	Benefit Plan AP2017	BP Effective Date 01/01/2017	BP Term Date 12/31/2020
IPA Allied IPA	IPA Effective Date 01/01/2017	IPA Term Date 12/31/2020		
PCP Number P00002076	PCP Name Kumar, Saroj	PCP Effective Date 01/01/2017	PCP Term Date 12/31/2020	PCP Location 657 link road Miami Gardens, FL 33056
Gender Female	Ethnicity	PCP Phone (765) 887-9679	PCP Extension	PCP Fax (678) 969-6989
Benefit Plan Description				
Benefit Detail Health plan- Access Dental Plan Product- Participating				

The Current Coverage Section allows users to view the member's current coverage details.

Claims Review Screen

Claim Header Section

Claim Header

Medicare (Medicare #)
 Medicaid (Medicaid #)
 Incare (ID#000#)
 CHAMPVA (Member ID #)
 Group Health Plan (ID #)
 FLCA BLK LUNG (ID#)
 Other (ID #)

Claim Number	Status	Claim Type	Header Level Pend
2017061200345817	Paid	Professional	
Encounter	Batch	Page	External ID
No			
Received Type	First Date Of Service	Original Received Date	Received Date
Paper Claim	06/12/2017	06/12/2017	06/12/2017
			Total Charges
			\$50.00

Claim Member Information

Is Patient Insured Person?

Member Number	First Name	Last Name	Middle Initial	Date of Birth	Gender
AH0003	Indian	Star		01/01/2012	Female
Address Line #1	Address Line #2 (Suit/Apt.)	City	State	Zip Code	Country
Hillsborough road	Suit 23	tampa	FL	33626	USA
Province	County	Health Plan	Line of Business	Product	IPA
	Hillsborough	Access dental plan	Alliedhealth	Participating	Allied IPA
Network	Group Name	Group ID	Benefit Plan	Effective From	Effective To
Allied Network			AP2017	01/01/2017	12/31/2020

Claim Member PCP Information

PCP Plan ID	PCP Name	PCP NPI	PCP TIN	Taxonomy
P00002076	Kumar, Saroj mn M.D.	04/20/1970	01/07/1970	03/04/1970
Address Line #1	Address Line #2 (Suit/Apt.)	City	State	Zip Code
657 link road		Miami Gardens	FL	33056

The **Claim Header** section allows the users to view the Claim Member’s Summary, the Claim Member’s Information, and the Claim Member’s PCP Information.

Claims Review Screen

Provider or Facility Information Section

Provider or Facility Information

Rendering Provider:		Billing Vendor:		Service Facility Location:	
Provider Number	Name	Vendor Number	Pay to Name	Provider Number	Name
P00002076	Kumar Saroj	V00001006	Vendor Allied		
Provider NPI	TIN	NPI	TIN	Provider NPI	TIN
9454545645	564696898		987654321123456		
IPA	Specialty	Address 1	City	IPA	Specialty
		Home line road	Tampa		
Address 1	City	State	Zip Code	Address 1	City
657 link road	Miami Gardens	FL	33625		
State	Zip Code			State	Zip Code
FL	33056				

Referring Provider

Provider Number	Name	Degree	NPI	TIN

The **Provider or Facility Information** section allows users to view the rendering and referring provider/facility information of the member’s claim.

Claims Review Screen

Claim Process Detail Section

The **Claim Process Detail** section contains two tabs: Claim Detail and Claim Audit. This section allows the users to view the details of a processed claim and view any audits made on the claim.

Claim Process Detail

Claim Detail | Claim Audit

Status	Svc From	Svc To	CPT	Mod1	Mod2	Mod3	Mod4	POS	Dx	QTY	Type	Billed	Allowed	Adjusted	Primary Paid	Co-Pay	Co-Insurance	Deductible	MBR Liability	W.Hold	Interest	Penalty	Net Paid	Duplicate	Auth#	NDC	DOFR Defer ID									
1	Approved	06/12/2017	06/12/2017	V5286				11	A	1	Unit	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00													
Reason		MCAL20 - 20% REDUCTION FOR OUTP HOSP APPLIED																																		
Total												\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

The **Claim Detail** tab allows users to view the details of the process claim of the member.

Claim Process Detail

Claim Detail | Claim Audit

Audited By	Examiner	Procedural Score	Financial Score	Other Findings	Is Queue	Is Corrected	Is Examiner
No data available in table.							

The **Claim Audit** tab allows users to view any audits processed on the member’s claim.

Claims Review Screen

Claim Details Section

Claim Details

Is Patient's Condition Related To:

Employment Accident? No

Auto Accident? No

Other Accident? No

Asg Ben: Yes

Rel Info: Yes

Dates Patient Unable to work in current occupation

From: To:

Hospitalization dates related to current services

From: To:

Outside Lab? No

Lab Charges: \$0.00

Resubmission Code

Original Ref No.

Patient Account Number

Patient Status

Reserved For NUCC Use

Additional Claim Info+

Reserved For Local Use

Date of Current Illness, Injury, or Pregnancy (LMP)

Claim Codes 0

Dx Codes 1

ICD 9 ICD 10

DX A

Z99.3 - Dependence on wheelchair

The **Claim Details** section contains two sub sections: Claim Codes and DX Codes. The Claim Details section allows users to view the member’s claim detail information, along with the claim codes and dx codes on the claim.

Claims Review Screen

Coordination of Benefits Section

Coordination of Benefits																	
Other Health Plan Line	Other Health Plan Policy/GroupNumber	Prior Payment	Balance Due	EST Amount Due	Primary Allowed Amount	Primary Paid Amount	Primary Deductible Amount	Primary Coinsurance Amount	Primary CoPay Amount	Primary Not Covered Amount	Primary With-Hold Amount	Primary Adjustment Amount	Member Obligation Amount	Subrogation Amount	Lifetime Reserve Days	Non Covered Days	Days Covered by Coinsurance
No data available in table.																	

The **Coordination of Benefits** section allows users to view COB's on the member's claim.

Claims Review Screen

Attachments Section

Attachments 0						
Type	Category	File Name	Description	Date	Uploaded By	
No data available in table.						

The **Attachment** section allows users to view any attachments on the member's claim.

Claims Review Screen

Authorization Information Section

Authorization Information					
Authorization Number	Referral Date	Approved Date	Effective Date	Expiration Date	Authorization Override
					No

The **Authorization Information** section allows users to view authorization information on the member's claim.

Claims Review Screen

Anesthesia Section

Anesthesia					
Anesthesia Time Type	Start Date	Start Time	End Date	End Time	Total Min

The **Anesthesia** section allows users to view anesthesia information on the member's claim.

Claims Review Screen

Ambulance Section

Ambulance							
Pick-Up Details				Drop-off Details			
Facility	NPI			Facility	NPI		
Address Line #1	Address Line #2 (Suit/Apt.)			Address Line #1	Address Line #2 (Suit/Apt.)		
City	State	Zip Code		City	State	Zip Code	
Begin Miles	End Miles	Total Miles		Round Trip Description	Transport Reason	Patient Weight(lb)	Stretcher Description

The **Ambulance** section allows users to view ambulance information on the member's claim.

Claims Review Screen

Check Details Section

Check Details			
Check No.	Date	Amount	Total
BB106	06/12/2017	\$ 0	\$ 0
<input type="checkbox"/> EOP this Claim <input type="checkbox"/> EOP for Check <input type="checkbox"/> EOB this Claim <input type="button" value="DEMAND"/>			

The **Check Details** section allows users to view check details, and reprint the check. Users can check the box to EOP the Claim, EOP for Check, or EOB this Claim. Once the check boxes have been selected the user can click the Demand button. Upon clicking the Demand button, the reprinting process will initiate.

Claims Appeal Screen

The Claim Appeal section allows users to appeal the member’s claim. Upon clicking the appeal button, the popup window shown below will appear.

Claim Appeal Popup Window

Claim Appeal Section

Claim Appeal
✕

Claim Number: 2017061200045817 , Paid Date: 06/12/2017 , Check Number: BB106 , Member Name: Star, Indian , PCD Name: Kumar, Saroj mn M.D.

Justification or Explanation

Required

Additional Information or Comments

Category - 1

Select an Option

Attachment - 1

Select file

✕
CHOOSE FILE

SEND
RESET

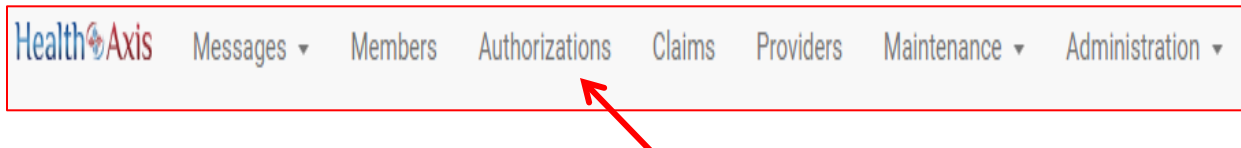
Justification or Explanation	The Justification or Explanation field allows users to enter the reason for appealing the claim. Note: Required field
Additional Information or Comments	The Additional Information or Comments field allows users to enter any additional information or comments pertaining to the appeal.
Category-1	The Category-1 field allows users to select a category from the dropdown list.
Attachment-1	<div style="display: flex; align-items: center; margin-bottom: 5px;"> CHOOSE FILE <div style="margin-left: 5px;">The Attachment-1 field allows users to choose a file to be attached by clicking the “choose file” button (shown above). Once a file has been selected it will be displayed in the attachment field.</div> </div> <div style="display: flex; align-items: center;"> ✕ <div style="margin-left: 5px;">The red X (shown left) will clear the selected file.</div> </div>
Send	The Send button allows users to send the claim appeal.
Reset	The Reset button allows users to clear all data from the fields prior to saving.

Authorization Module

The Authorization Module allows users with specific access to search and view providers details.

Accessing the Authorization Module

Once logged into the system, select Authorization from the dashboard.



Hospital Census Data

Upon clicking the Authorization Module, the Hospital Census Data will display. (If it is collapsed, click the arrow on the right to expand).

Authorization Screen

Hospital Census Data Section

Facility Name	Admissions	Total Days	LOS
Bushs Clinic	1	282	282.00
Second test mailing location	1	321	321.00
Smith Medical	2	297	148.50
Smith Primary Care	1	139	139.00
test Lab	1	251	251.00
Wellness Clinic	1	242	242.00

The Hospital Census Data section allows the users to view the number of admissions, total days, and average length of stay for admitted members.

Search Authorization

Upon clicking the Authorization Module, the Search Authorization screen will display. (If it is collapsed, click the arrow on the right to expand).

Authorization Screen

Search Authorization Section



Q Search Authorization ▼

Auth Number <input type="text" value="Auth Number"/>	Member <input type="text" value="Member Name"/> Q FIND	Member DOB <input type="text" value="Select Date"/>	HICN Number <input type="text" value="HICN Number"/>
Auth Status <input type="text" value="Select an Option"/> ▼	Type <input type="text" value="Select an Option"/> ▼	Auth Type <input type="text" value="Select an Option"/> ▼	Place Of Service <input type="text" value="Select an Option"/> ▼
LOB <input type="text" value="Select an Option"/> ▼	IPA <input type="text" value="Select an Option"/> ▼	Enter Date From <input type="text" value="Select Date"/>	Enter Date To <input type="text" value="Select Date"/>
Ordering Provider <input type="text" value="Ordering Provider"/> Q FIND	Requested Provider <input type="text" value="Requested Provider"/> Q FIND	Received Date From <input type="text" value="Select Date"/>	Received Date To <input type="text" value="Select Date"/>

Q SEARCH
↶ RESET

The Hospital Census Data section allows the users to view the number of admissions, total days, and average length of stay for admitted members.

Auth Number	The Auth Number field allows users to enter an authorization number as part of the search criteria.
Member	<div style="background-color: #0070c0; color: white; padding: 2px 5px; display: inline-block; font-size: 0.8em;">Q FIND</div> The Member field allows the user to enter the member’s name (Last Name, First Name) or click the Find button (shown to the left) to select the member from the Member Search popup window as part of the search criteria.
Member DOB	The Member DOB date field allows users to select the Member’s DOB using the calendar feature or by manually keying the member’s DOB in as follows: <ul style="list-style-type: none"> MM/DD/YYYY
HICN Number	The HICN Number field allows users to enter the HICN Number as part of the search criteria.
Auth Status	The Auth Status field allows users to select the appropriate Authorization Status from the dropdown list as part of the search criteria.
Type	The Type field allows users to narrow an authorization search by selecting the authorization type from the dropdown list.
Auth Type	The Authorization Type field allows users to select the appropriate Authorization Type from the dropdown list.
Place of Service	The Place of Service field allows users to narrow an authorization search by selecting the service location from the dropdown list.
LOB	The (LOB) field allows users to select a LOB from the dropdown list as part of the search criteria.

IPA	The IPA field allows users to select an IPA (or Network) from the dropdown list as part of the search criteria.
Enter Date From	The Enter Date From field allows users to select the “enter date from” of the authorization as part of the search criteria, by either using the calendar, or manually entering the date in the following format. MM/DD/YYYY
Enter Date To	The Enter Date To field allows users to select the “enter date to” of the authorization as part of the search criteria, by either using the calendar, or manually entering the date in the following format. MM/DD/YYYY
Ordering Provider	 The Ordering Provider field allows users to enter the name of the ordering provider (Last Name, First Name) or click the Find button (shown to the left) to select the provider from the Provider Search popup window as part of the search criteria.
Requested Provider	 The Requested Provider field allows users to enter the name of the requested provider (Last Name, First Name) or click the Find button (shown to the left) to select the provider from the Provider Search popup window as part of the search criteria.
Received Date From	The Received Date From field allows users to select the “received date from” as part of the search criteria, by either using the calendar, or manually entering the date in the following format. <ul style="list-style-type: none"> • MM/DD/YYYY
Received Date To	The Received Date To field allows users to select the “received date” (to) as part of the search criteria, by either using the calendar, or manually entering the date in the following format. <ul style="list-style-type: none"> • MM/DD/YYYY
Search	The Search button allows users to launch the Search Authorization functionality based on the criteria selected. The results will populate below the search section.
Reset	The Reset button allows users to clear all data from the fields prior to saving.

Authorization Screen

Field Names

Authorization Results Section – Field Descriptions



Received Date	Status	Admit Date	Auth Number	Member	IPA	HP	Submit Type	Category	Type	Place Of Service	Ordering Provider	Requested Provider	Requested Facility	ICD Code	Assigned To	Referred to
06/19/2017	Pend		1706190000041114	Patel, Darshan	Preferred Ipa	Blue Cross	Referral	Outpatient	Standard	Outpatient Hospital(22)	Assignment, General	Das, Jony		059.1		No
06/19/2017	Pend		1706190000041113	Patel, Darshan	Preferred Ipa	Blue Cross	Referral	Outpatient	Standard	Outpatient Hospital(22)	Assignment, General	Das, Jony		059.0		No

Export

The **Export** button allows the user to export the results data into an excel format.

Authorization Review Screen

Upon double clicking on the selected authorization from the grid, the authorization review screen will display. The user can view the details of the member’s authorization selected. The authorization review screen consists of the following collapsible sections: member’s information, member’s current coverage, authorization summary, ordering provider, requested facility, requested services, decision and routing information, attachments, notifications (letters), and inpatient tracking log.

Note: The action buttons at the top of the screen will be explained following this section.

Note: Each section can be collapsed for easier viewing. This section is for review only, users will not be allowed to edit.

Authorization Review Screen

Member Information Section

Member Information
▼

Salutation	Last Name	First Name	Middle Name	Suffix	Status
Mr.	Patel	Darshan	D.		MO1 - Active Member
Member ID	CIN Number	Date of Birth	Age	Gender	Marital Status
MC1000055		07/14/1990	26	Male	Single
Phone	Home Phone	Work Phone	Cell Phone	Fax	Email Address
(000)000-0000	(000)000-0000	(000)000-0000	(000)000-0000		
Primary Language	Employment	Emergency Contact	Emergency Phone	Address	
Gujarati	Full Time		000-000-0000	Address line 1, Tampa, FL 33609	

The **Member Information** section allows users to view the member’s demographic information.

Claims Review Screen

Current Coverage Section

Coverage
▼

Health Plan	Benefit Plan	IPA	BP Effective Date	BP Term Date
Blue Cross	MC2015	Preferred IPA	10/01/2016	
PCP Number	PCP Name			
PC0001012	Assignment General			

The **Current Coverage** Section allows users to view the member’s current coverage details.

Authorization Review Screen

Authorization Summary Section

Authorization			
Authorization # 1706190000041114	Status Pend	Entered By PortalUser	Date/Time 05/19/2017 5:57 PM
Received Date 05/19/2017	Received Time 16:42:00	Start Date 05/19/2017	Expiration Date
Type Standard	Category Outpatient	POS Outpatient Hospital(ZZ)	Authorization Type SURG - Surgery
Admit Type	Admit Date	Admit Time	Discharge Date
MRN/Account No	Planned Discharge Date	Planned Discharge To	

The **Authorization Summary** section allows users to view the summary details of the member's authorization.

Authorization Review Screen

Ordering Provider Section

Ordering Provider				
Provider Number P00001012	Last Name Assignment	First Name General	MI	Degree
Org Name ABCD	Specialty Cardiologist	IPA Name Preferred IPA		
NPI	Tax ID 879809809	Phone (000)000-0000	Fax () - -	
Address 3801 N Nebraska Ave	City Tampa	State FL	Zip Code 33609	

The **Ordering Provider** section allows users to view the ordering provider's details.

Authorization Review Screen

Requested Provider Section

Requested Provider				
Provider Number P00002077	Last Name Das	First Name Jony	MI	Degree
Org Name Das Jony	Specialty	IPA Name Preferred IPA		
NPI 8451432132	Tax ID 676007009	Phone (000)000-0000	Fax (965)413-2132	
Address Address line 1	City Aguadilla	State PR	Zip Code 00603	

The **Requested Provider** section allows users to view the requested provider's details.

Authorization Review Screen

Requested Facility Section

Requested Facility
▲

Facility Number	Org Name	IPA Name	Specialty
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
NPI	Tax ID	Phone	Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	City	State	Zip Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

The **Requested Facility** section allows users to view the requested facility's details.

Authorization Review Screen

Requested Provider Section

Requested Provider
▲

Provider Number	Last Name	First Name	MI	Degree
<input type="text" value="P00002077"/>	<input type="text" value="Das"/>	<input type="text" value="Jony"/>	<input type="text"/>	<input type="text"/>
Org Name	Specialty	IPA Name	Preferred IPA	
<input type="text" value="Das Jony"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
NPI	Tax ID	Phone	Fax	
<input type="text" value="8451432132"/>	<input type="text" value="676007009"/>	<input type="text" value="(000)000-0000"/>	<input type="text" value="(965)413-2132"/>	
Address	City	State	Zip Code	
<input type="text" value="Address line 1"/>	<input type="text" value="Aguadilla"/>	<input type="text" value="PR"/>	<input type="text" value="00603"/>	

The **Requested Provider** section allows users to view the requested provider's details.

Authorization Review Screen

Requested Services Section

Requested Services
▲

ICD 9 ICD 10

DX #1	DX #2	DX #3	DX #4
<input type="text" value="059.1 - OTHER PARAPOXVIRUS INFECTIONS*"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
DX #5	DX #6	DX #7	DX #8
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ICD Proc #1	ICD Proc #2	ICD Proc #3	ICD Proc #4
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Svc From	Svc To	Rev	Procedure	Mod1	Mod2	Qty	Fee/Unit	Fee/Low	Qty Type	Decision	Reason
06/19/2017			0001M	25		1	0	0			

The **Requested Services** section allows users to view the requested services of the member's authorization.

Authorization Review Screen

Decision and Routing Information Section

Decision and Routing Information									
Date	Entered By	Health Plan Auth Number	Queue	Assigned To	Decision Date	Decision Time	Decision	Reason	Comments
06/19/2017 05:57 PM	PortalUser			PortalUser	06/19/2017		Pend	Provider is UM-DNU	Provider is UM-DNU

The **Decision and Routing Information** section allows users to view the decision and routing details of the member's authorization.

Authorization Review Screen

Attachments Section

Attachments 1					
Type	Category	File Name	Description	Date	Uploaded By
Authorization		Clinical_Information_06-19-2017_5-57-18-PM.pdf	Clinical Information	06/19/2017 5:57 PM	PortalUser

The **Attachments** section allows users to view any attachments for the member's authorization.

Authorization Review Screen

Notifications (Letters) Section

Notifications (Letters)					
Date	Send To	Date Notified	Notified Via	Download	
No data available in table.					

The **Notification** section allows users to view any notifications (letters) for the member's authorization.

Authorization Review Screen
















Inpatient Tracking Log Section

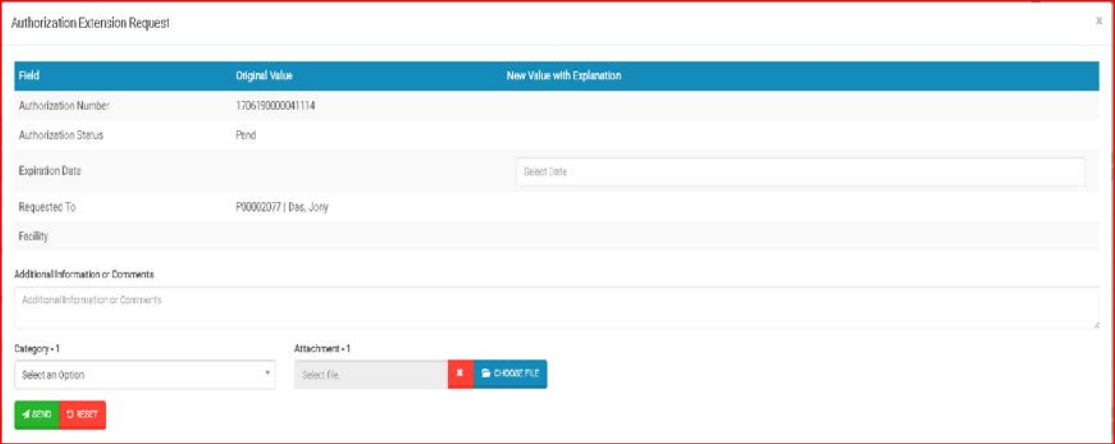
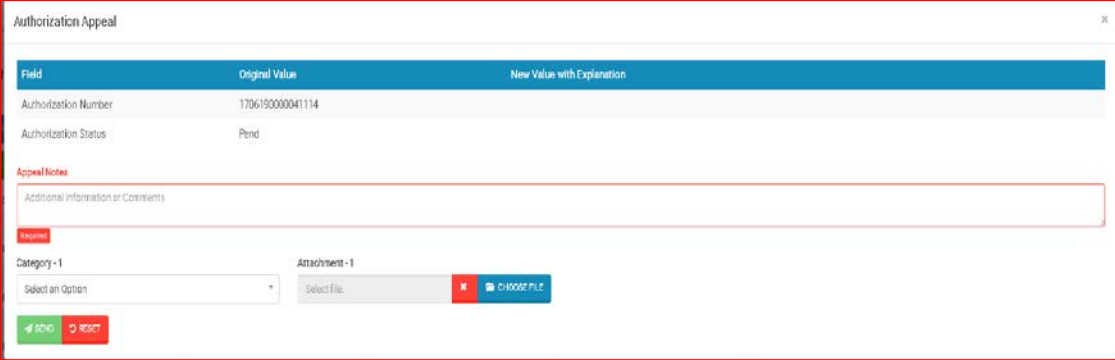
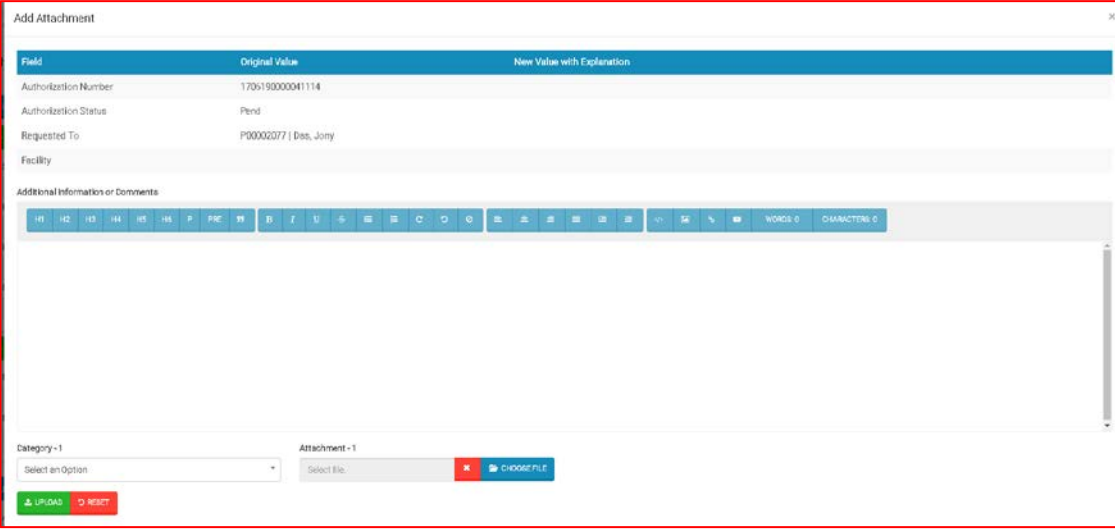
Inpatient Tracking Log 0						
From Date	From Time	To Date	To Time	Total Hours	Care Type	Notes
No data available in table.						

The **Inpatient Tracking Log** section allows users to view the tracking log of inpatients.

Action Buttons

The Action Buttons at the top of the Authorization Information screen allows users to perform various tasks within the authorization information screen.

Authorization Information Screen																																																																														
Action Buttons																																																																														
<div style="background-color: #0070c0; color: white; padding: 5px; display: flex; justify-content: space-between; align-items: center;">  UPDATE AUTHORIZATION  MODIFICATION REQUEST  EXTENSION REQUEST  APPEAL  ADD ATTACHMENT  PRINT </div>																																																																														
Update Authorization	<p>The Update Authorization button allows users to update the current authorization being viewed. Once the user clicks the update authorization button the authorization will appear. Users can update the desire information and click submit.</p>																																																																													
Modification Request	<p>The Modification Request button allows users to modify the authorization being viewed. Upon clicking the modification button, a popup screen will display as seen below.</p> <div style="border: 2px solid red; padding: 10px; margin-top: 10px;"> <p>Authorization Modification Request</p> <p>Submission Guidelines</p> <p>Tip: Modification Request Guidelines</p> <table border="1"> <thead> <tr> <th>Field</th> <th>Original Value</th> <th colspan="3">New Value with Explanation</th> </tr> </thead> <tbody> <tr> <td>Authorization Number</td> <td>1705190000041114</td> <td colspan="3"></td> </tr> <tr> <td>Authorization Status</td> <td>Pend</td> <td colspan="3"></td> </tr> <tr> <td>Expiration Date</td> <td></td> <td colspan="3">Select Date</td> </tr> <tr> <td rowspan="3">Procedure Codes</td> <td rowspan="3">0001M</td> <td>Svc Code #1</td> <td>Svc Code #2</td> <td>Svc Code #3</td> </tr> <tr> <td>Enter code</td> <td>Enter code</td> <td>Enter code</td> </tr> <tr> <td colspan="3"> <input type="radio"/> ICD 9 <input checked="" type="radio"/> ICD 10 </td> </tr> <tr> <td rowspan="3">Diagnostic Codes</td> <td rowspan="3">055.1</td> <td>Dx Code #1</td> <td>Dx Code #2</td> <td>Dx Code #3</td> </tr> <tr> <td>Enter code</td> <td>Enter code</td> <td>Enter code</td> </tr> <tr> <td colspan="3">New Value with Explanation c. Find</td> </tr> <tr> <td>Requested To</td> <td>P000020771 Bas, Jony</td> <td colspan="3">New Value with Explanation c. Find</td> </tr> <tr> <td>Facility</td> <td></td> <td colspan="3">New Value with Explanation c. Find</td> </tr> <tr> <td colspan="5">Additional Information or Comments</td> </tr> <tr> <td colspan="5">Additional Information or Comments</td> </tr> <tr> <td>Category - 1</td> <td></td> <td>Attachment - 1</td> <td colspan="2"></td> </tr> <tr> <td>Select an Option</td> <td></td> <td>Select File</td> <td colspan="2"> Choose File</td> </tr> <tr> <td colspan="2"> 6940</td> <td colspan="3"> 6907</td> </tr> </tbody> </table> </div>	Field	Original Value	New Value with Explanation			Authorization Number	1705190000041114				Authorization Status	Pend				Expiration Date		Select Date			Procedure Codes	0001M	Svc Code #1	Svc Code #2	Svc Code #3	Enter code	Enter code	Enter code	<input type="radio"/> ICD 9 <input checked="" type="radio"/> ICD 10			Diagnostic Codes	055.1	Dx Code #1	Dx Code #2	Dx Code #3	Enter code	Enter code	Enter code	New Value with Explanation c. Find			Requested To	P000020771 Bas, Jony	New Value with Explanation c. Find			Facility		New Value with Explanation c. Find			Additional Information or Comments					Additional Information or Comments					Category - 1		Attachment - 1			Select an Option		Select File	 Choose File		 6940		 6907		
Field	Original Value	New Value with Explanation																																																																												
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		Enter code	Enter code	Enter code																																																																										
		<input type="radio"/> ICD 9 <input checked="" type="radio"/> ICD 10																																																																												
Diagnostic Codes	055.1	Dx Code #1	Dx Code #2	Dx Code #3																																																																										
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Facility		New Value with Explanation c. Find																																																																												
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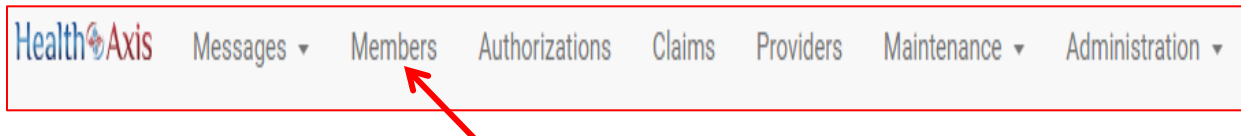
<p>Extension Request</p>	<p>The Extension Request button allows users to request an extension for the authorization. Upon clicking the extension request button, a popup screen will display as seen below.</p> 
<p>Appeal</p>	<p>The Appeal button allows users to appeal the authorization being viewed. Upon clicking the appeal button, a popup screen will display as seen below.</p> 
<p>Add Attachment</p>	<p>The Add Attachment button allows users to add an attachment to the authorization being viewed. Upon clicking the add attachment button a popup screen will display as seen below.</p> 
<p>Print</p>	<p>The Print button allows users to print the authorization information screen.</p>

Member Module

The Member Module allows users with specific access to search and view member details.

Accessing the Member Module

Once logged into the system, select Member from the dashboard.



Member Screen

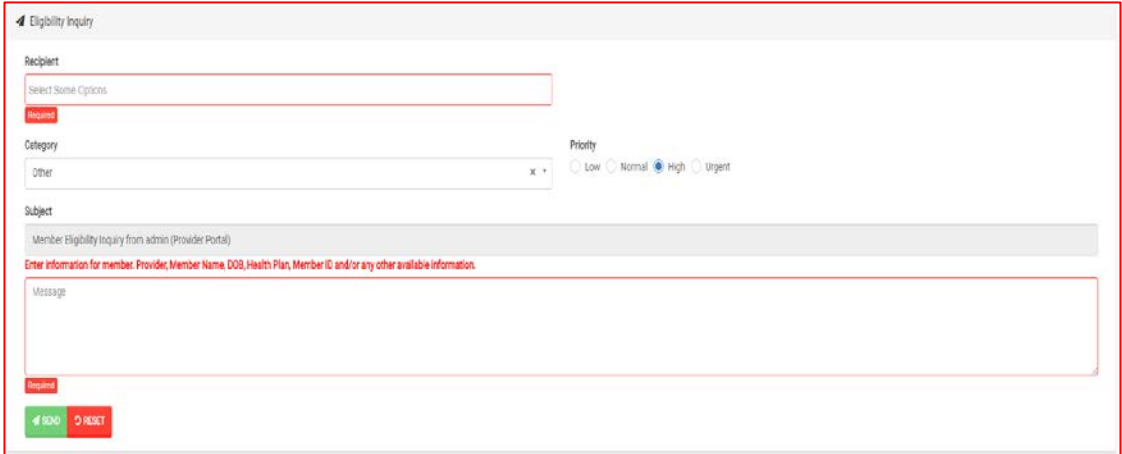
Member Search Section

Member Search Double click on row to select member. X

Search By <input type="text" value="Select an Option"/>	Search for <input type="text" value="Search For"/>	HICN Number <input type="text" value="HICN Number"/>	Member DOB <input type="text" value="Select Date"/>
Health Plan <input type="text" value="Select an Option"/>	Line Of Business <input type="text" value="Select an Option"/>	Benefit Plan <input type="text" value="Select an Option"/>	IPA <input type="text" value="Select an Option"/>

ELIGIBILITY INQUIRY

Search By	<p>The “Search By” field contains a dropdown list that can be utilized to narrow down a search to only display providers with specific criteria. Choices are:</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="background-color: #0056b3; color: white; padding: 2px;">Last, First</p> <p>Last Name</p> <p>First Name</p> <p>CIN Number</p> <p>Member ID</p> <p>PCP Last, First</p> </div>
Search For	<p>The Search For fields corresponds to the selection chosen in the <i>Search By</i> field.</p> <p>EX: Smith</p> <p><i>NOTE: An entry is required in this field, if a selection is made in the search by field.</i></p>
HICN Number	<p>The HICN Number field allows users to enter the HICN Number as part of the search criteria.</p>

Member DOB	The Member DOB date field allows users to select the Member’s DOB using the calendar feature or by manually keying the member’s DOB in as follows: <ul style="list-style-type: none"> MM/DD/YYYY
Health Plan	The Health Plan dropdown list allows users to select a health plan as part of the search criteria.
Line of Business	The Line of Business field allows users to narrow the member search by selecting a line of business from the dropdown list.
Benefit Plan	The Benefit Plan field allows users to narrow the member search by selecting a benefit plan from the dropdown list.
IPA	The IPA field allows users to narrow the member search by selecting an IPA from the dropdown list.
Search	The Search button allows users to launch the search functionality, based on criteria selected. The results will populate below the search section.
Reset	The Reset button allows users to clear all data from the fields prior to saving.
Eligibility Inquiry	<p>The Eligibility Inquiry button allows users to send an inquiry requiring a member’s eligibility. Upon clicking the eligibility inquiry button, the eligibility inquiry screen will appear as seen below:</p>  <p>Users can enter the recipient, category, priority and message. Upon clicking the send button, the inquiry will be sent to the recipient entered.</p>

Member Search Screen

Field Names

Member Results Section – Field Descriptions

Search Result - 124											EXPORT
Name	Member ID	DOB	Phone Number	Eff Date	Term Date	PCP	Health Plan	LOB	Benefit Plan	IPA	Benefit ID
<input checked="" type="checkbox"/> Abraham, Lucas	MC1000048	12/12/1980	(000)000-0000	02/15/2017	02/15/2019	Assignment, General	Blue Cross	Medical	Plan MA2	Preferred Ipa	MA2
<input checked="" type="checkbox"/> Accucheck, Accucheck	MC1000542	10/25/1988	(746)135-1321	01/01/2015	12/31/2017	Dhaval, Patel	Blue Cross	Medical	Plan MA2	Preferred Ipa	MA2
<input checked="" type="checkbox"/> Addepalli, Mohan	MC1000032	07/21/1998	000-000-0000	01/02/2016		Larson, Desi	Blue Cross	Medical	Medi-CAL2015	Preferred Ipa	MC2015
<input checked="" type="checkbox"/> Addepalli, Mohan	MC1000035	07/21/1998	000-000-0000	01/02/2016		Larson, Desi	Blue Cross	Medical	Medi-CAL2015	Preferred Ipa	MC2015
<input checked="" type="checkbox"/> Addepalli, Mohan	MC1000023	07/21/1998	000-000-0000	01/02/2016		Larson, Desi	Blue Cross	Medical	Medi-CAL2015	Preferred Ipa	MC2015
<input checked="" type="checkbox"/> Addepalli, Mohan	MC1000024	07/21/1998	000-000-0000	01/02/2016		Larson, Desi	Blue Cross	Medical	Medi-CAL2015	Preferred Ipa	MC2015
<input checked="" type="checkbox"/> Addepalli, Mohan	MC1000025	07/21/1998	000-000-0000	01/02/2016		Larson, Desi	Blue Cross	Medical	Medi-CAL2015	Preferred Ipa	MC2015
<input checked="" type="checkbox"/> Addepalli, Mohan	MC1000026	07/21/1998	000-000-0000	01/02/2016		Larson, Desi	Blue Cross	Medical	Medi-CAL2015	Preferred Ipa	MC2015
<input checked="" type="checkbox"/> Addepalli, Mohan	MC1000028	07/21/1998	000-000-0000	01/02/2016		Larson, Desi	Blue Cross	Medical	Medi-CAL2015	Preferred Ipa	MC2015
<input checked="" type="checkbox"/> Addepalli, Mohan	MC1000029	07/21/1998	000-000-0000	01/02/2016		Larson, Desi	Blue Cross	Medical	Medi-CAL2015	Preferred Ipa	MC2015

PREVIOUS 1 2 3 4 5 6 7 ... 13 NEXT

Search Results

The “**Search Results**” heading tells the users how many records are displayed in the results table.

Export

The **Export** button allows the user to export the results data into an excel format.

Results Table

The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order; click the arrows next to the header. (as shown below)



Member Information

Upon double clicking on the selected member from the grid, the member information will populate into the member information screen. The user can now view the Member's Information, Current Coverage, Coverage History, Coordination of Benefits, and Cases.

Member Information Screen

Member Information Section

Member Information
▼

Salutation Mrs.	Last Name Abraham	First Name Lucus	Middle Name Test	Suffix Sr.	Status M01 - Active Member
Member ID MC1000048	CIN Number	Date of Birth 12/12/1980	Age 36	Gender Female	Marital Status Married
Phone (000)000-0000	Home Phone (000)000-0000	Work Phone (000)000-0000	Cell Phone (000)000-0000	Fax (333)090-1231	Email Address test@mail.com
Primary Language Achinese	Employment Part Time	Emergency Contact	Emergency Phone	Address Address line 1, Tortugas, NM 88001	

The **Member Information** section allows users with specific access to view all active members' demographic information.

Current Coverage

Member Information Screen

Current Coverage Section

Current Coverage
▼

Health Plan Blue Cross	Line Of Business Medical	Benefit Plan MA2	BP Effective Date 02/15/2017	BP Term Date 02/15/2019
IPA Preferred IPA	IPA Effective Date 02/15/2017	IPA Term Date 06/30/2017		
PCP Number P00001012	PCP Name Assignment, General	PCP Effective Date 02/15/2017	PCP Term Date 06/30/2017	PCP Location 3801 N Nebraska Ave Tampa, FL 33609
Gender	Ethnicity	PCP Phone (000) 000-0000	PCP Extension	PCP Fax Primary Lab

Benefit Plan Description

Plan Name: Patriot Plus (PFFS)
 PBP Number: 002
 Max out of Pocket: 6700 - Combined
 Contract Number: H3421

Office Visit
 Primary Care Visit: \$20
 Specialist Visit: \$50
 Urgently Needed Care SPEC: \$50
 Urgently Needed Care PCP: \$20

The **Current Coverage** section allows users with specific access to view all active members' coverage.

Coverage History

Member Information Screen

Coverage History Section

🔄 Coverage History ⓘ

Health Plan	Line Of Business	IPA	Benefit Plan ID	Effective Date	Term Date	PCP	PCP Effective Date	PCP Term Date	Status
Blue Cross	MediCal	Preferred IPA	MO2015	05/09/2016	08/08/2016	patel, Andrew	10/06/2016		InActivated

The **Coverage History** section allows users with specific access to view all active members' coverage history.

Coordination of Benefits

Member Information Screen

Coordination of Benefits Section

☰ Coordination of Benefits ⓘ

Policy Number	Plan Name	Type	Plan Group	Eff Date	Term Date	Verified	MSP Code
No data available in table.							

The **Coordination of Benefits** section allows users with specific access to view all active members' COBs.

Cases

Member Information Screen

Cases Section

☰ Coordination of Benefits ▼

Policy Number	Plan Name	Type	Plan Group	Eff Date	Term Date	Verified	MSP Code
No data available in table.							


The **Cases** section allows users with specific access to view all active members' Cases.

Action Buttons

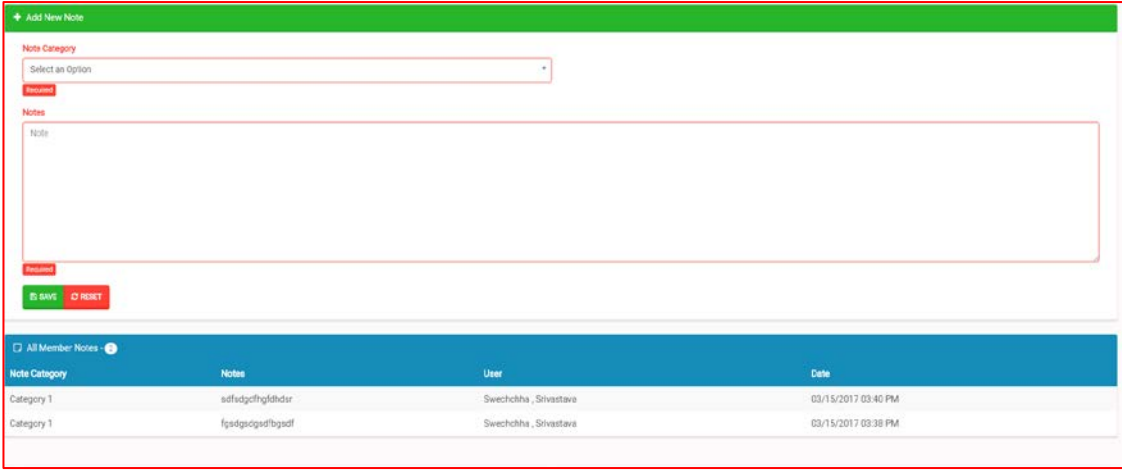
The Action Buttons at the top of the Member Information screen allows users to perform various tasks within the member information screen.

Member Information Screen

Action Buttons

AUTHORIZATION ▼
CLAIM ▼
ATTACHMENTS
NOTES
PROBLEMS
HCC/STAR
LABS
OUTREACH
RX
 PRINT

Authorization	<p>The Authorization button allows users to view all authorizations tied to the selected member, or create an authorization for the selected member.</p> <p>Choices are:</p> <div style="border: 1px solid red; padding: 5px; margin: 5px 0;"> <p style="text-align: center;">View All Create Authorization</p> </div>												
Claim	<p>The Claim button allows users to view all claims tied to the selected member, or create a new claim for the selected member.</p> <p>Choices are:</p> <div style="border: 1px solid red; padding: 5px; margin: 5px 0;"> <p style="text-align: center;">View All Create Claim</p> </div>												
Attachments	<p>The Attachments button allows users to view/download all attachments tied to the selected member. Upon clicking the attachment button, the following popup window will appear.</p> <div style="border: 1px solid red; padding: 5px; margin: 5px 0;"> <p style="text-align: right; font-size: small;">Member Attachments x</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #0070c0; color: white;"> <th>Type</th> <th>Category</th> <th>File Name</th> <th>Description</th> <th>Date</th> <th>Uploaded By</th> </tr> </thead> <tbody> <tr> <td colspan="6" style="text-align: center;">No data available in table.</td> </tr> </tbody> </table> </div>	Type	Category	File Name	Description	Date	Uploaded By	No data available in table.					
Type	Category	File Name	Description	Date	Uploaded By								
No data available in table.													

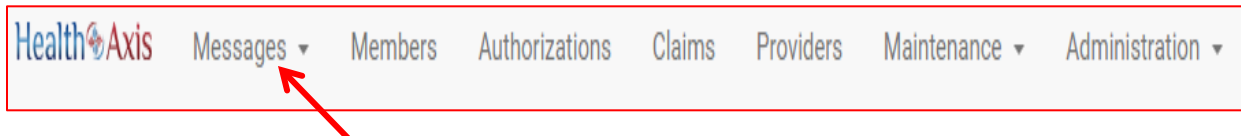
Notes	<p>The Notes button allows users to add/view notes tied to the selected member. Upon clicking the note button, the screen seen below will appear. Users can create a new note, or view existing notes at the bottom.</p>  <table border="1" data-bbox="399 667 1515 804"> <thead> <tr> <th>Note Category</th> <th>Notes</th> <th>User</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>Category 1</td> <td>sdfsdfghjklhdsr</td> <td>Swechhha ,Sivastava</td> <td>03/15/2017 03:40 PM</td> </tr> <tr> <td>Category 1</td> <td>fgsdgdsdflbgdsf</td> <td>Swechhha ,Sivastava</td> <td>03/15/2017 03:38 PM</td> </tr> </tbody> </table>	Note Category	Notes	User	Date	Category 1	sdfsdfghjklhdsr	Swechhha ,Sivastava	03/15/2017 03:40 PM	Category 1	fgsdgdsdflbgdsf	Swechhha ,Sivastava	03/15/2017 03:38 PM
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Category 1	fgsdgdsdflbgdsf	Swechhha ,Sivastava	03/15/2017 03:38 PM										
Problems	<p>The Problems button allows users to view or manual create a new problem for selected member. See Member Problem Section</p>												
HCC/Star	Future enhancement												
Labs	Future enhancement												
Outreach	Future enhancement												
RX	Future enhancement												
Print	The Print button allows users to print the member information screen.												

Message Module

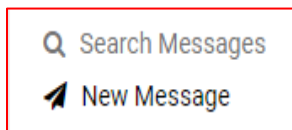
The Message Module allows users to search, view and send messages.

Accessing the Message Module

Once logged into the system, select Member from the dashboard.



The dropdown list for the Message Module contains the following selections.




Message Screen	
Search Message Section	
<p>A screenshot of the Search Message section interface. It features a green header with a magnifying glass icon and the text 'Search Message'. Below the header are several input fields: a 'Search' field, a 'Category' dropdown menu, an 'Enter Date From' field, and an 'Enter Date To' field. There are also radio buttons for 'All', 'Read', 'Unread', and 'Deleted', and another set of radio buttons for 'Received' and 'Send'. At the bottom, there are two buttons: a green 'SEARCH' button and a red 'RESET' button.</p>	
Search	The Search field allows users to enter the subject of the message as part of the search criteria.
Category	The Category field allows users to select a category from the dropdown list as part of the search criteria.
Enter Date From	The Enter Date From field allows users to select the “enter date from” of the message as part of the search criteria, by either using the calendar, or manually entering the date in the following format. <ul style="list-style-type: none"> MM/DD/YYYY

Enter Date To	The Enter Date to field allows users to select the “enter date to” of the message as part of the search criteria, by either using the calendar, or manually entering the date in the following format. <ul style="list-style-type: none"> • MM/DD/YYYY
Radio Buttons	The All, Read, Unread, Deleted, Received and Send radio buttons allows users to select as part of the search criteria.
Search	The Search button allows users to launch the Search Message functionality based on the criteria selected. The results will populate below the search message section.
Reset	The Reset button allows users to clear all data from the fields prior to saving.

Message Screen

Field Names	Message Results Section – Field Descriptions
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Search Results	The Search Results heading tells the users how many records are displayed in the results table.
Results Table	The Results Table is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order; click the errors next to the header. (as shown below) 

Message Information

Upon double clicking on the selected message from the grid, the details of the message will be displayed.

Message Information Screen

Message Details Section

✓ MARK AS UNREAD
↩ REPLY
➦ FORWARD

✉ test

From: admin

Date: 4/24/17 1:36 PM

Category: Authorization

Priority: Normal

test

The user can view the details of the message, mark as unread, reply, or forward the message.

New Message

The New Message sub module allows users to create a new message to send to a recipient.

Message Screen

Field Names
New Message Section – Field Descriptions

✉ New Message

Recipient Announcement?

Category Priority Low Normal High Urgent

Subject

Enter Message Detail

Message

Recipient	The Recipient field allows users to enter one or more recipient names to send a message. Note: Required field
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Announcement	The Announcement check box allows users to select if the message is an announcement for all users.
Category	The Category field allows users to select a category for the message. Note: Required field
Priority	The Priority radio buttons allow users to select the priority of the message: Choices are: (Low, Normal, High, Urgent)
Subject	The Subject field allows users to enter the subject of the message. Note: Required field
Enter Message Detail	The Enter Message Detail field allows users to enter the details of the message being sent. Note: Required field
Send	The Send button allows users to send the message to the entered recipient(s).
Reset	The Reset button allows users to clear all data from the fields prior to saving.