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SmartCare

Claim Review Process

User Guide

This guide demonstrates the updates to the Claim Review Process for CMHA-CEI program staff and how IS or the Provider Network Specialist will add Providers to the review list.

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Working Claims with Flag

Claim Review Flag Behavior

Functionality has been added to SmartCare that activates the Claim Line Under Review Flag for claims submitted by specified Providers.

Having this flag active on the claim will prevent it from flowing directly into the adjudication process. This will give CMHA-CEI program staff time to review claims for correctness or review any required supporting documentation. The Provider Network Specialist worked with program staff to identify which providers are required to submit supporting documentation, as well as those providers who are considered “High Risk”.

When a claim is submitted from a provider who has been identified as needing review from CMHA-CEI program staff, the Claim Line Under Review Flag is activated automatically by the SmartCare system. If you view the Claim Line Details of the submitted claim, you will see the check box is active.

The screenshot shows the 'Claim Line Detail' form. At the top, there is a 'Select Action' dropdown and buttons for 'Save', 'View Claim Form', and 'Audit Log'. The form is divided into two tabs: 'General' and 'Custom Fields'. The 'Claim Line Information' section contains the following data:

Claim Line ID	2126252	Client Id	973016	Client	<u>Tester 1, Training</u>	Provider	<u>Training Provider</u>	<input type="checkbox"/> Non-Network Provider
Status	Entry Complete	Received Date	01/24/2020	Site	<u>Training Site</u>	Type	Group Home Licensed	
Claim Form	Professional	Clean Date	01/24/2020	Provider ID	549	Tax ID	123456789	
Claim ID	<u>83909</u>	Authorization(s)		<input type="checkbox"/> Do Not Adjudicate		<input type="checkbox"/> Needs to be worked		
<input type="checkbox"/> Electronic		Batch		<input type="checkbox"/> Readjudicate		<input type="checkbox"/> Previous Payer EOB Received		
<input type="checkbox"/> Override Pended Reason				<input checked="" type="checkbox"/> Claim Line Under Review		<input type="checkbox"/> Final Status		

The 'Service/Charge' section contains the following data:

Start Date	12/09/2019	CPT/HCPCS Modifiers	90832	Rev Code		Units	2.00	Amount Paid	\$0.00
End Date	12/09/2019	POS	11 Office	Charge	\$133.90	Amount Claimed	\$133.90	Balance	\$0.00

Viewing Claims with Review Flag

To view claims that require review:

- Under the My Office tab, select Care Management>CM Billing>Claims. This will navigate you to the Claim Lines screen.

The screenshot shows the 'Claim Lines (45)' interface. A dropdown menu for 'All Statuses' is open, with 'Claims' highlighted. The table below displays the following data:

Claim Line	Client Name	Status	Payable Amount	Paid Amount	Procedure	Insurer	Units
2126223	Tester 1, Tra	2019 Entry Incomp...	\$0.00	\$0.00	90832	CEI CMH	
2126224	Tester 1, Tra	2019 Entry Incomp...	\$0.00	\$0.00	90834	CEI CMH	
2126242	Tester 1, Tra	2019 Paid	\$0.00	\$66.95	90832	CEI CMH	
2126243	Tester 1, Tra	2019 Paid	\$0.00	\$66.95	90832	CEI CMH	
2126244	Tester 1, Training	Training Provider, 12/24/2019	Paid	\$0.00	\$66.95	90832	CEI CMH
2126245	Tester 1, Training	Training Provider, 12/25/2019	Paid	\$0.00	\$66.95	90832	CEI CMH

- Use the second drop down to select claims with a status of Claim Line Under Review, then click the Apply Filter button to view only claims with the flag active.

The screenshot shows the 'Claim Lines (45)' interface with the 'All Statuses' dropdown menu open. 'Claim Line Under Review' is selected. The table below displays the following data:

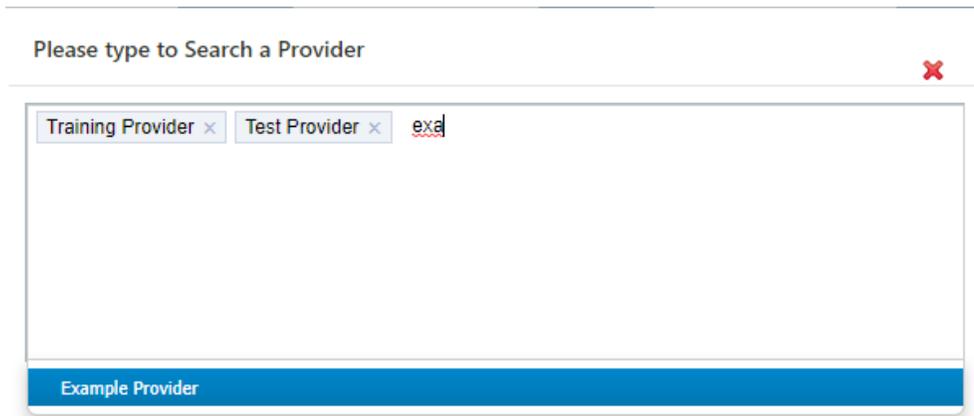
Claim Line	Client Name	Payable Amount	Paid Amount	Procedure	Insurer	Units
2126223	Tester 1, Training	comp...	\$0.00	\$0.00	90832	CEI CMH
2126224	Tester 1, Training	comp...	\$0.00	\$0.00	90834	CEI CMH
2126242	Tester 1, Training		\$0.00	\$66.95	90832	CEI CMH
2126243	Tester 1, Training		\$0.00	\$66.95	90832	CEI CMH

- To view only the claims from a specific provider use the provider filter.

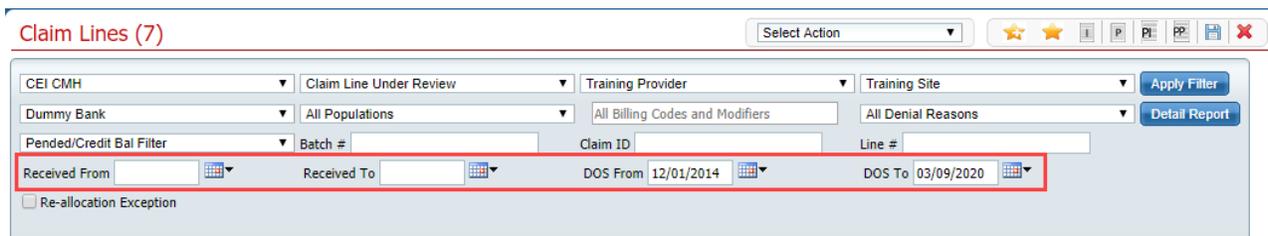
The screenshot shows the 'Claim Lines (7)' interface. The 'Training Provider' dropdown menu is open and highlighted. The interface includes filters for 'CEI CMH', 'Claim Line Under Review', 'Training Provider', and 'Training Site'. There are also buttons for 'Apply Filter' and 'Detail Report'.

- When you click the drop down, a pop-up window will appear.

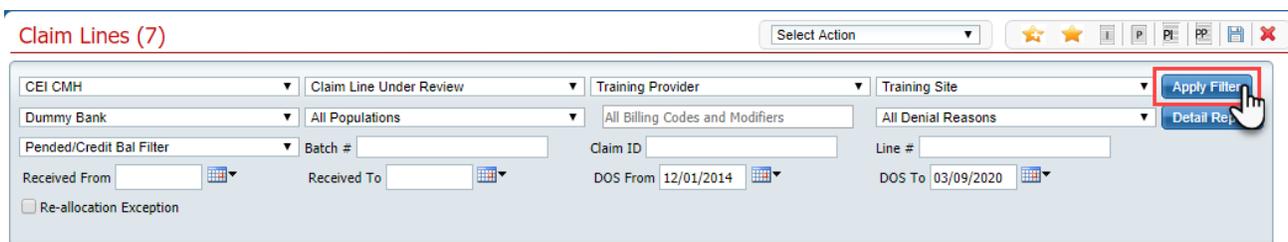
- Click anywhere in the text box to search for the provider you want to add. You may select multiple providers.
- Select the provider from the list to add them to the filter.
- Click the X next to the provider name if you want to remove them from the filter list.
- Once the provider(s) whose claims you want to view have been selected in the filter, close the pop-up window by clicking on the red X in the top right of that window.



- Verify the date range selected for Received Date and Date of Service. If the range is not correct, the filter will prevent you from seeing the claim lines you want to review.



- Once the provider(s) whose claims you want to view have been selected in the filter, click the Apply Filter button to view only those provider's claims which require review.



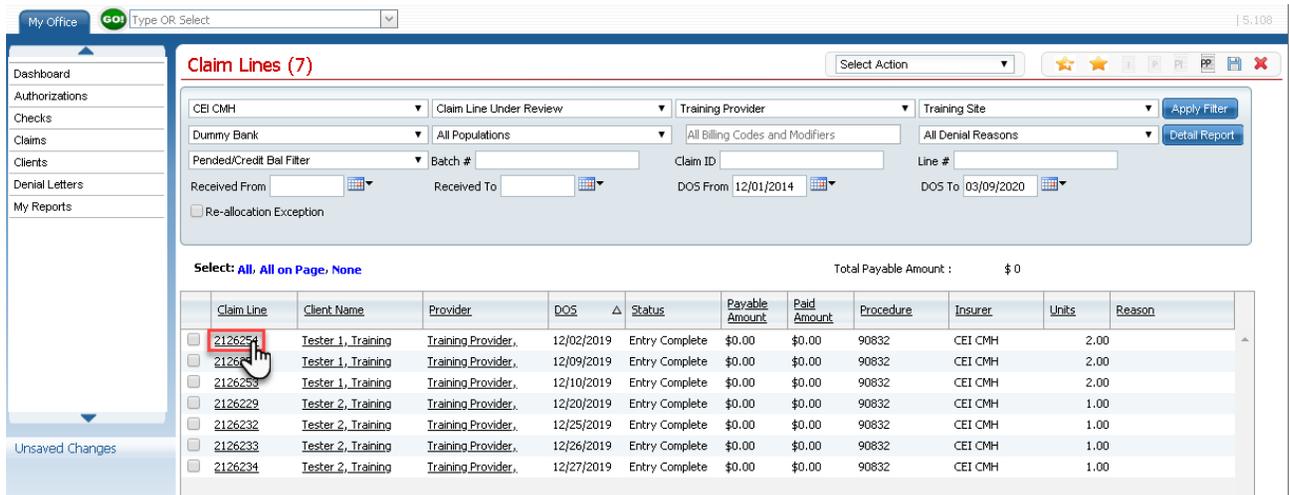
Removing Claim Review Flag

Claim Line Detail

Once you have completed the review of supporting documentation and you are ready to remove the flag, there are two different ways to perform this action. To remove the Claim Review Flag from a

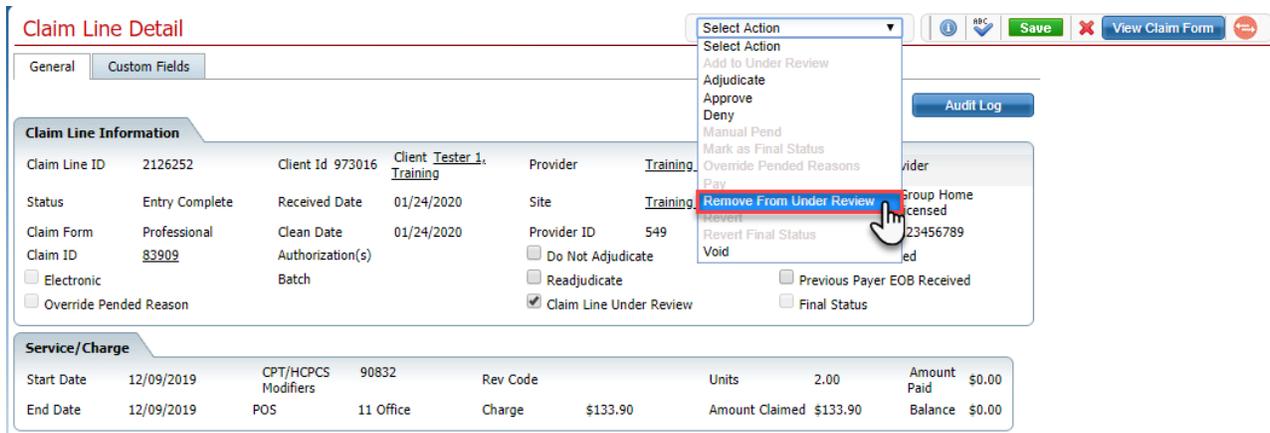
single claim, navigate to the Claim Lines screen as described in the previous section, [Viewing Claims with Review Flag](#).

- From the Claim Lines screen, click on the Claim Line ID you want to approve. This will take you to the Claim Line Details screen.

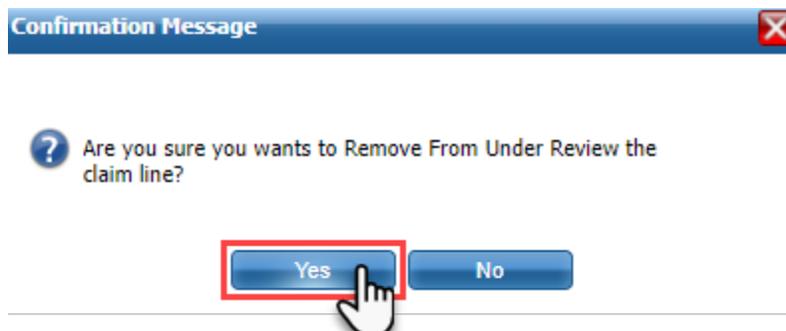


- Verify you have selected the correct claim line by reviewing the information on the Claim Line Details screen.
- Use the action drop down and click on, 'Remove From Under Review'.

IMPORTANT: Clicking on the check box will not remove the flag



- You will receive a confirmation pop-up, click Yes to remove the Under Review flag.



Claim Lines

To remove the Claim Review Flag from multiple claims, navigate to the Claim Lines screen as described in the previous section, [Viewing Claims with Review Flag](#).

- Use the checkboxes to select the claims you want to remove the Claim Line Under Review Flag from. Then use the Action drop-down to select 'Remove From Under Review'.

The screenshot shows the 'Claim Lines (7)' interface. At the top, there are filters for 'CEI CMH', 'Claim Line Under Review', and 'Training Provider'. Below these are fields for 'Batch #', 'Claim ID', and 'DOS From'. A table of claim lines is displayed with columns: Claim Line, Client Name, Provider, DOS, Status, Payable Amount, Paid Amount, Procedure, Insurer, Units, and Reason. The first six rows are checked. An 'Action' dropdown menu is open, showing options like 'Add to Under Review', 'Remove From Under Review', and 'Revert'. A hand cursor is pointing at 'Remove From Under Review'.

Claim Line	Client Name	Provider	DOS	Status	Payable Amount	Paid Amount	Procedure	Insurer	Units	Reason	
<input checked="" type="checkbox"/>	2126252	Tester 1, Training	Training Provider,	12/09/2019	Entry Complete	\$0.00	\$0.00	90832	CEI CMH	2.00	
<input checked="" type="checkbox"/>	2126253	Tester 1, Training	Training Provider,	12/10/2019	Entry Complete	\$0.00	\$0.00	90832	CEI CMH	2.00	
<input checked="" type="checkbox"/>	2126254	Tester 1, Training	Training Provider,	12/02/2019	Entry Complete	\$0.00	\$0.00	90832	CEI CMH	2.00	
<input checked="" type="checkbox"/>	2126229	Tester 2, Training	Training Provider,	12/20/2019	Entry Complete	\$0.00	\$0.00	90832	CEI CMH	1.00	
<input checked="" type="checkbox"/>	2126232	Tester 2, Training	Training Provider,	12/25/2019	Entry Complete	\$0.00	\$0.00	90832	CEI CMH	1.00	
<input checked="" type="checkbox"/>	2126233	Tester 2, Training	Training Provider,	12/26/2019	Entry Complete	\$0.00	\$0.00	90832	CEI CMH	1.00	
<input checked="" type="checkbox"/>	2126234	Tester 2, Training	Training Provider,	12/27/2019	Entry Complete	\$0.00	\$0.00	90832	CEI CMH	1.00	

- You will receive a confirmation pop-up. Click Yes to remove the Claim Line Under Review Flag from the claim lines you have selected.

A blue confirmation message dialog box with a close button (X) in the top right corner. The text inside reads: '? Are you sure you wants to Remove From Under Review the claim line?'. Below the text are two buttons: 'Yes' and 'No'. A hand cursor is pointing at the 'Yes' button.

Claim Line Review – Work Flow

