Care Management Providers and Contracts

Table of Contents

Providers

Enter a Provider

From the *Provider Information* page, you can:

Enter a New Provider

Change an Existing Provider

Delete a Provider

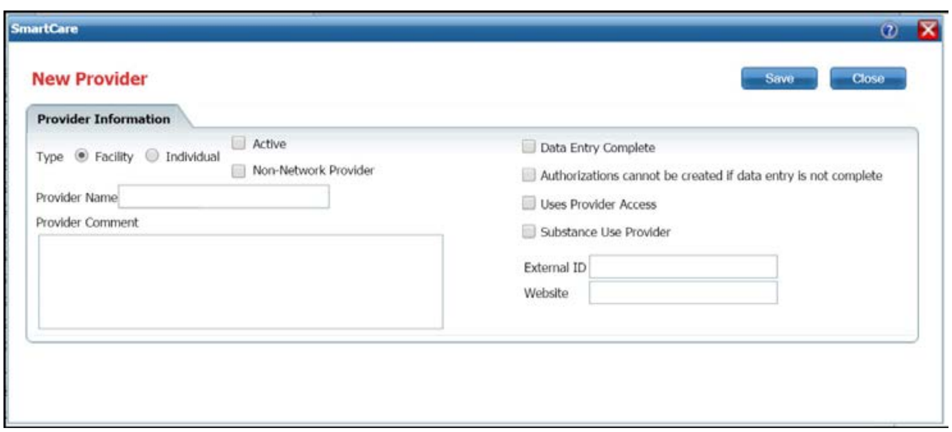
To Enter a New Provider

1. Display the *Provider Contracts (###)* list page. Tell me how...

   The *Provider Contracts (###)* list page is displayed. View field definitions.

2. Click the **New Item** icon in the task bar.

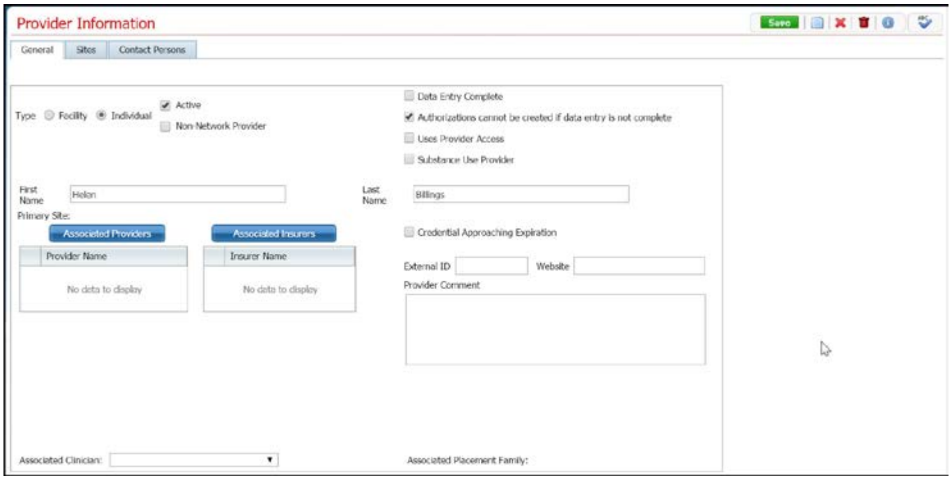
   The *New Provider* window is displayed. View field definitions.



3. Complete the **New Provider** window.

4. Click the **Save** button when you are done.

   The *Provider Information* page is displayed with the *General* tab active. View field definitions.

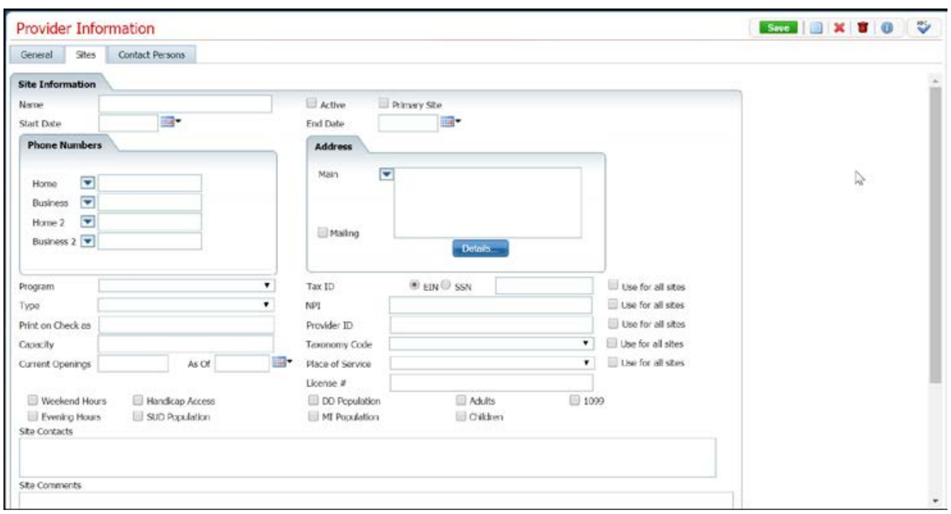


5. Complete the **General** tab.

6. Click **Save** when the *General* tab is complete.

7. Click the **Sites** tab to activate it.

The *Sites* tab is displayed. View field definitions.

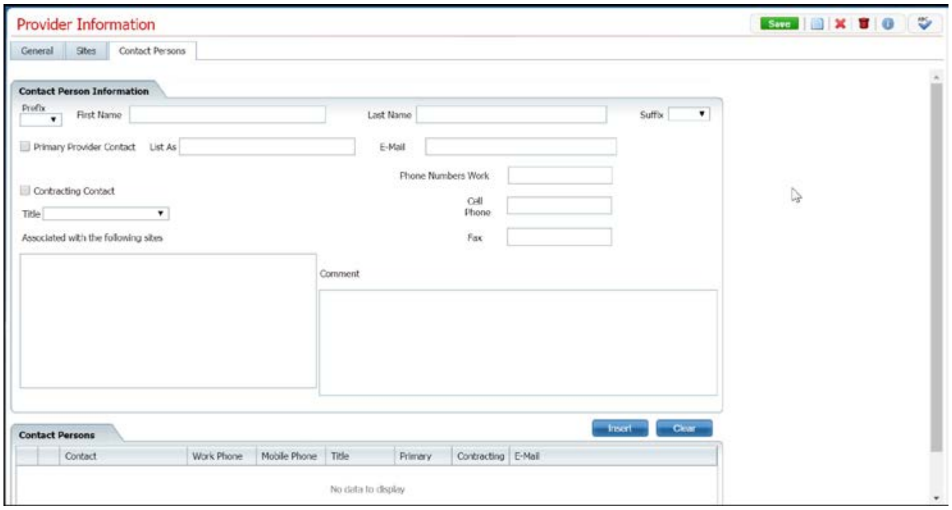


8. Complete the **Sites** tab.

9. Click the **Save** button in the task bar when you are done.

10. Click the **Contact Persons** tab to make it active.

The *Contact Persons* tab is displayed. View field definitions.



11. Complete the **Contact Persons** tab.

12. Click the **Save** button in the task bar when you are done.

13. Click the **Exit** icon to leave the *Provider Information* page when it is complete.

    The *Provider Contracts (###)* list page is displayed.

To Change an Existing Provider

After a provider is set up in the system, use this procedure to make changes to the provider's information.

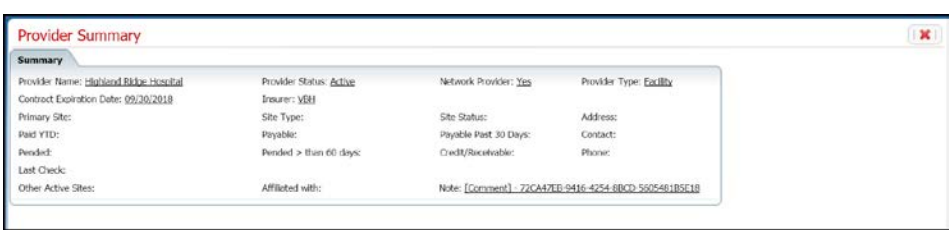
1. Click the **Open this Provider** drop down arrow on the title bar.

   Notice the red rectangle in the screen image below identifying the *Open this Provider* drop down list.

2. Select the **provider whose information you want to change** from the list. Type the first letter of the provider's last name to move quickly to that location in the list.

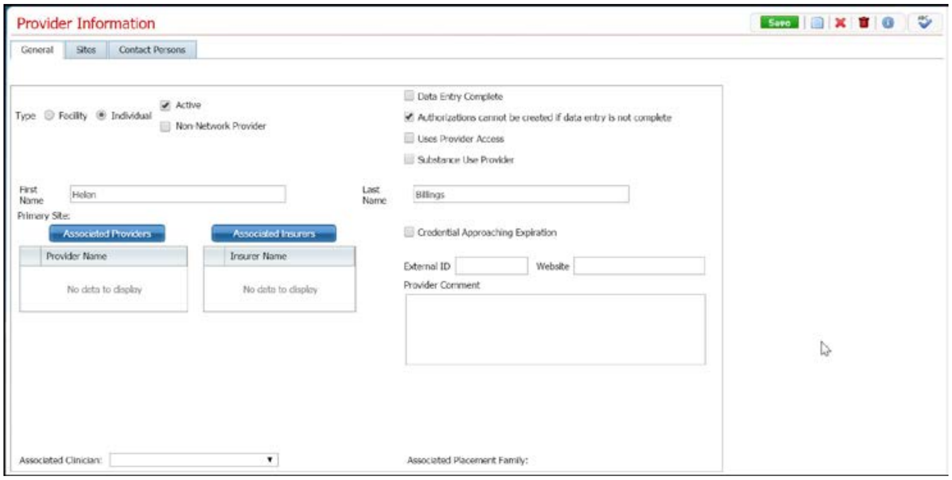
3. Click on the **name of the provider** whose information you want to display.

   The *Provider Summary* page is displayed. View field definitions.



4. Click on the **Provider Name hyperlink** to display the *Provider Information* page.

   The *Provider Information* page is displayed with the *General* tab active for the provider you selected. View field definitions.

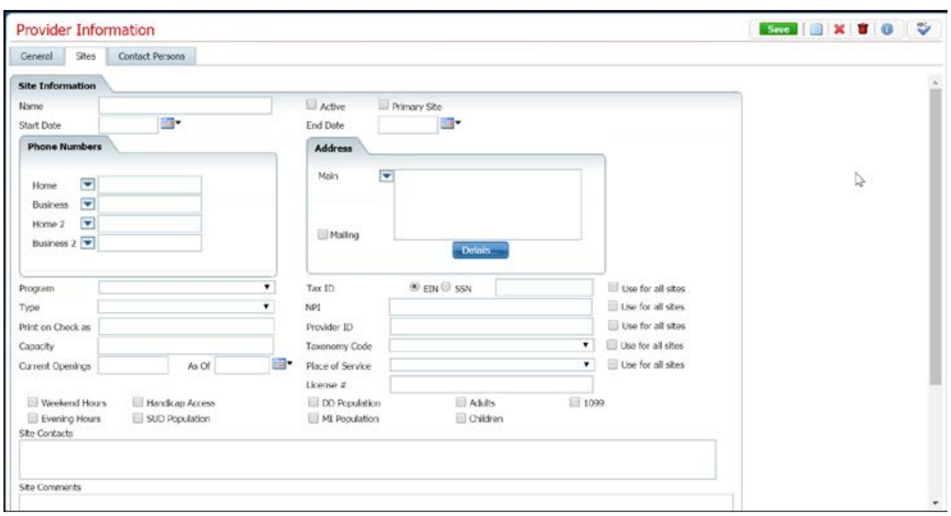


5. Make **changes** to the *General* tab, if needed.

6. Click the **Save** button in the task bar.

7. Click on the **Sites** tab to make it active.

   The *Sites* tab is displayed. View field definitions.

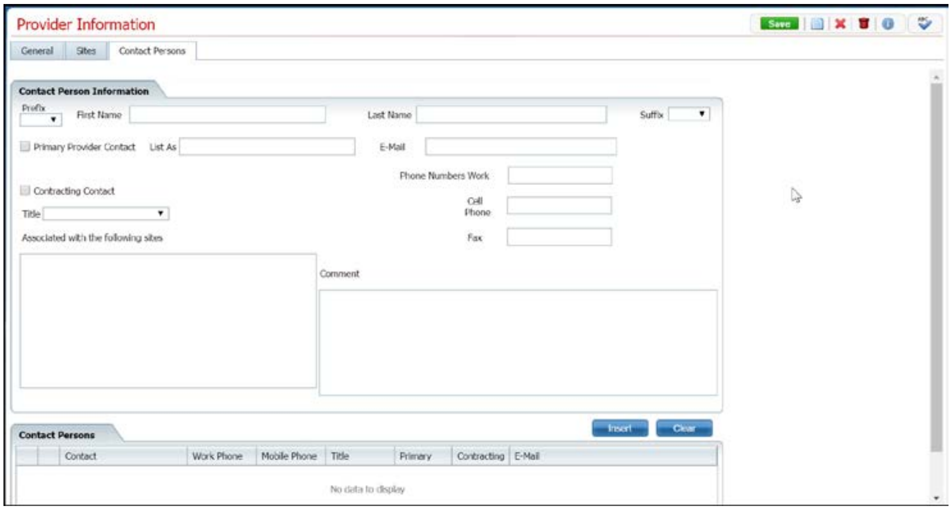


8. Make **changes** on the *Sites* tab, if needed.

9. Click the **Save** button in the task bar.

10. Click on the **Contact Person** tab to make it active.

The *Contact Person* tab is displayed. View field definitions.



11. Make **changes** on the *Contact Person* tab, if needed.

12. Click the **Save** button in the task bar.

13. If you are finished making changes to this provider, click the **Exit** icon to exit to the *Provider Summary* page.

To Delete a Provider

While it is possible to delete a provider from the system, it is very important that you do not delete a provider for whom services have been billed and/or paid. If the provider has been involved in processing of claims in the system, it will cause problems if you delete the provider.

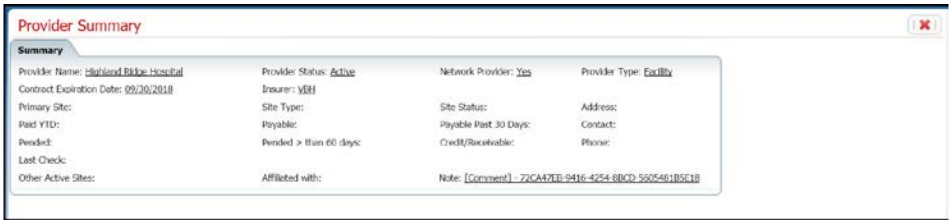
1. Click the **Open this Provider** drop down arrow on the title bar.

   Notice the red rectangle in the screen image below identifying the *Open this Provider* drop down list.

2. Select the **provider you want to delete** from the list. Type the first letter of the provider's last name to move quickly to that location in the list.

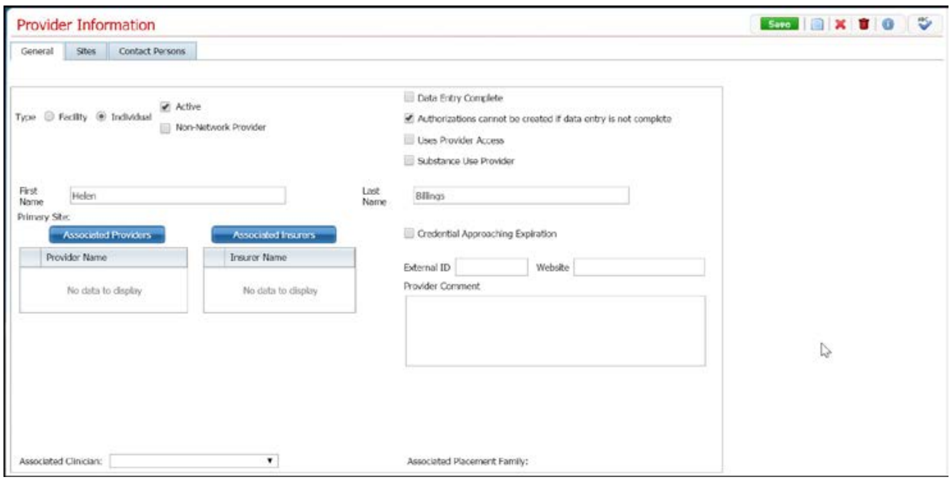
3. Click on the **name of the provider** whose information you want to display.

   The *Provider Summary* page is displayed. View field definitions.



4. Click on the **Provider Name hyperlink** to display the *Provider Information* page.

   The *Provider Information* page is displayed with the *General* tab active for the provider you selected. View [field definitions](#).



5. Click the **trash can** icon in the task bar.

6. Click the **Yes** button in the *Confirmation Message* window.

   The *Dashboard* page is displayed and the provider is deleted.

[Why can't I access these screens?](#)

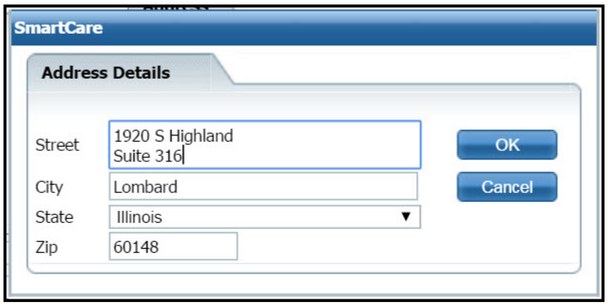
Enter Address Details for a Provider

1. Display the *Provider Information* page with the *Sites* tab active. Tell me how...

2. In the *Address* section, click the **drop arrow** to define the address you are entering. Your choices are *Main*, *Office* or *Office 2*.

3. Click the **Details** button.

The *Address Details* window is displayed. View field definitions.



4. Complete the **Address Details** window.

5. Click the **OK** button.

The window is closed and the *Provider Information* page is displayed with the *Sites* tab active.

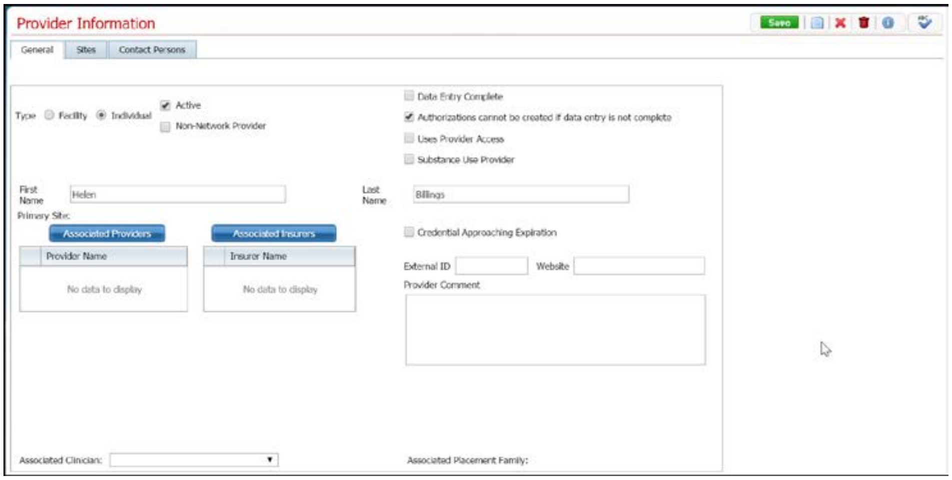
Why can't I access these screens?

Add an Associated Insurer to a Provider

An associated insurer identifies insurers who will pay for charges submitted by the provider.

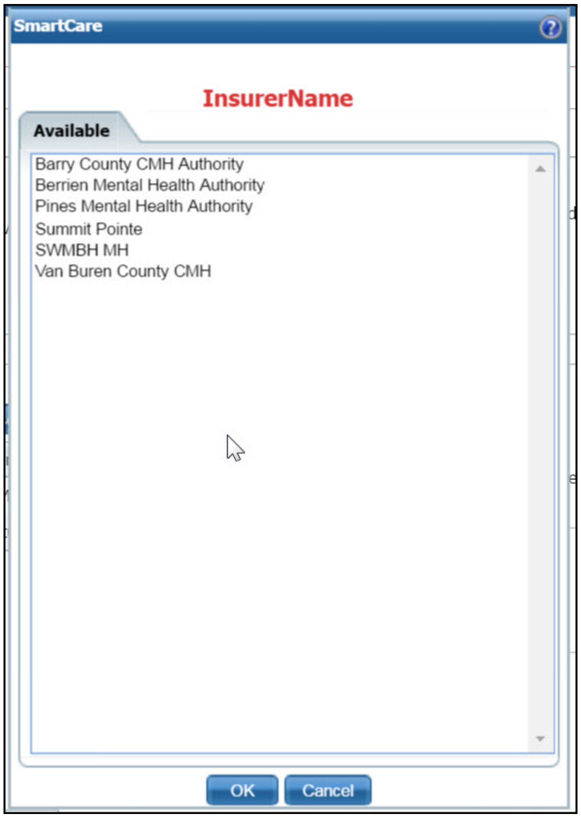
1. Display the *Provider Information* page. Tell me how...

   The *Provider Information* page is displayed with the *General* tab active. View field definitions.



2. Click the **Associated Insurers** button.

   The *Insurer Name* window is displayed. View field definitions.



3. Select the **insurer** you want to associate with the provider you are setting up.

4. Click the **OK** button.

   The window is closed and the insurer's name is listed in the *Associated Insurers* list box.

5. To associate more insurers with the provider you are setting up, repeat **steps 2 through 4** until you have added all the insurers you need to add.

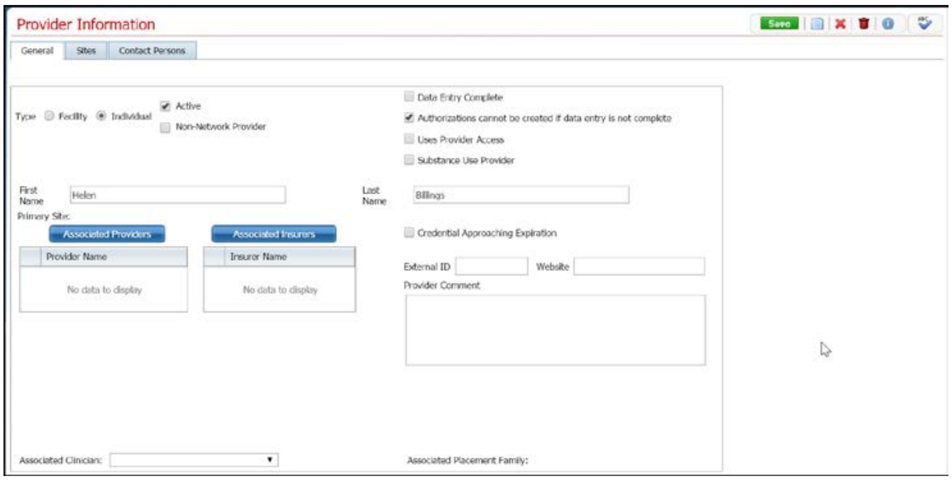
Why can't I access these screens?

Delete an Associated Insurer

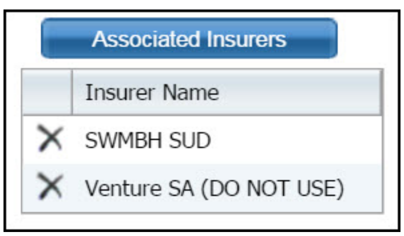
While you can delete an associated insurer, if claims have been billed to and paid by the insurer, you should not delete the insurer. When the insurer information is connected to a claim, charge or service in the system, deleting the insurer can cause problems.

1. Display the *Provider Information* page. Tell me how...

   The *Provider Information* page is displayed with the *General* tab active. View field definitions.



3. Note the **Associated Insurers** button with the selected insurers listed in the box below the button.



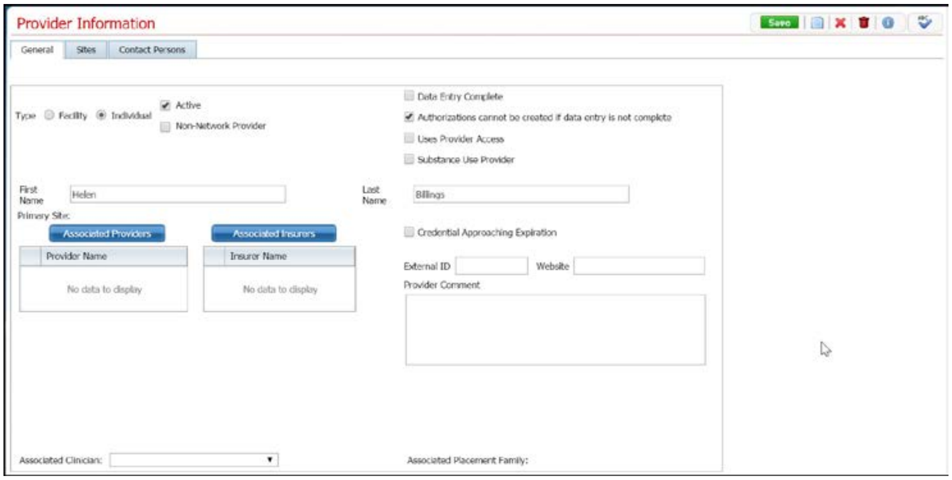
4. Click the **delete** icon to the left of the insurer’s name that you want to delete.
5. Click the **OK** button in the *Confirmation Message* window.
6. Click the **Save** button to save your changes.
7. Click the **Exit** icon in the task bar when you are done.

Add an Associated Provider to a Provider

An associated provider is one who provides services to clients at a facility which bills the services to the MCO. Use this procedure to set up the providers who give service to clients and will bill under the providers information.

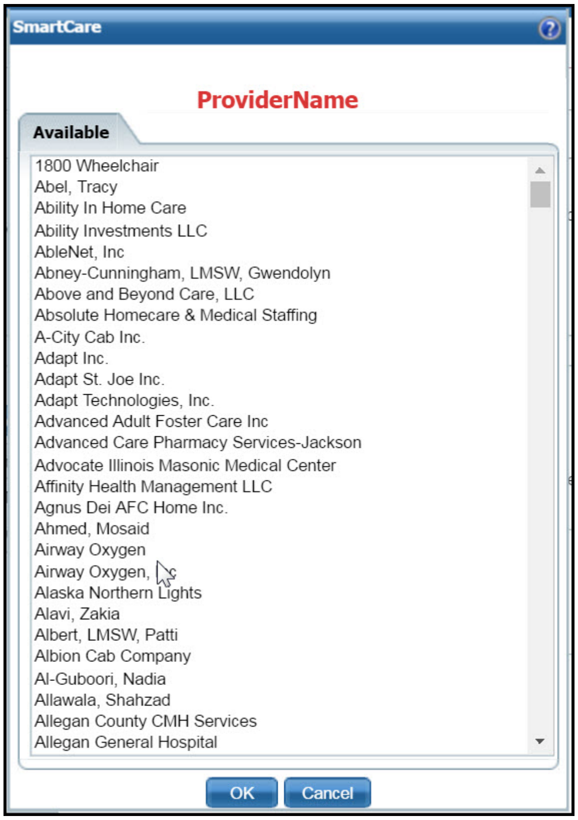
1. Display the *Provider Information* page. Tell me how...

   The *Provider Information* page is displayed with the *General* tab active. View field definitions.



2. Click the **Associated Providers** button.

   The *Provider Name* window is displayed. View field definitions.



3. Select the **provider** you want to associate with the provider you are setting up.

4. Click the **OK** button.

   The window is closed and the provider’s name is listed in the *Associated Providers* list box.

5. To associate more providers with the provider you are setting up, repeat **steps 2 through 4** until you have added all providers you need to add.

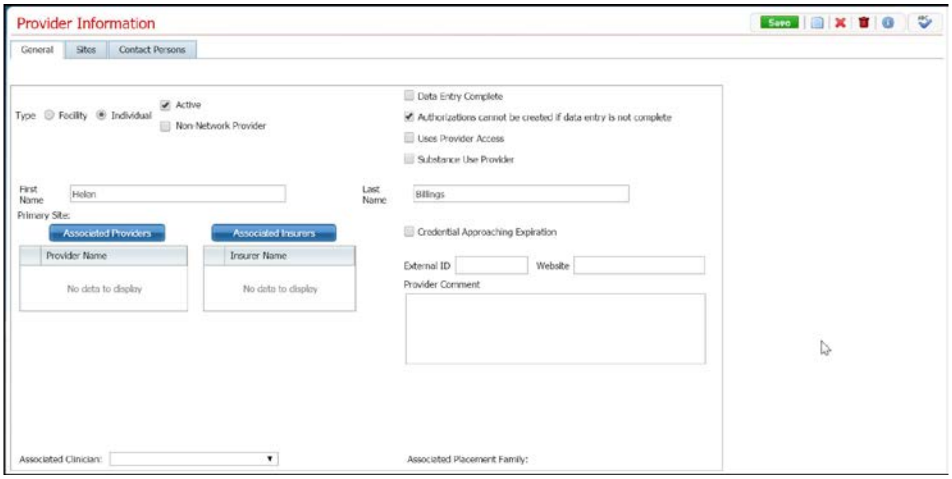
Why can’t I access these screens?

Delete an Associated Provider

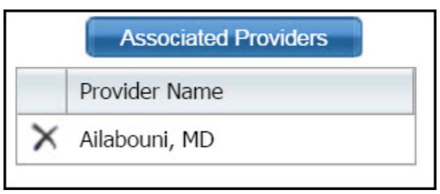
While you can delete an associated provider, if the claims and services have been billed by or for the associated provider, you should not delete the provider. When the provider information is connected to a claim, charge or service in the system, deleting the provider can cause problems.

1. Display the *Provider Information* page. Tell me how...

   The *Provider Information* page is displayed with the *General* tab active. View field definitions.



2. Note the **Associated Providers** button with the selected providers listed in the box below the button.



3. Click the **delete** icon to the left of the provider's name that you want to delete.

4. Click the **OK** button in the *Confirmation Message* window.

5. Click the **Save** button to save your changes.

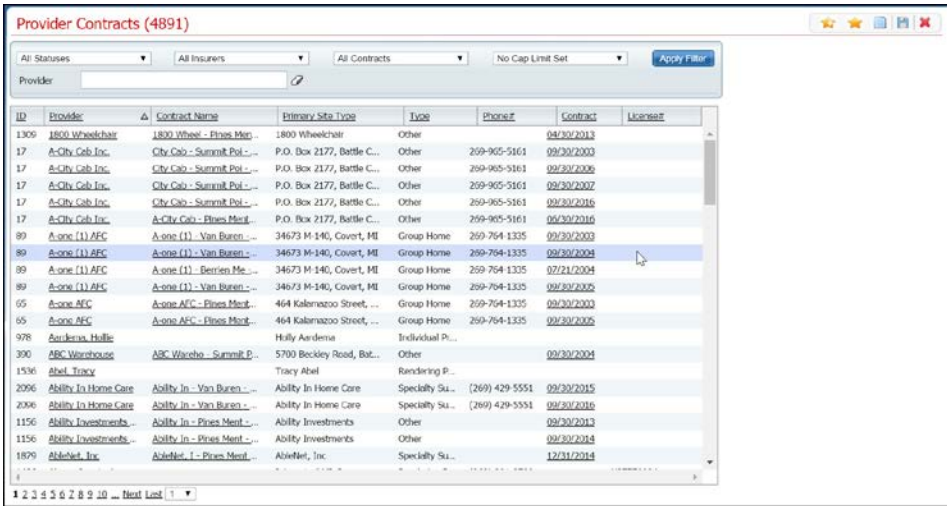
6. Click the **Exit** icon in the task bar when you are done.

Why can't I access these screens?

Export a List of Providers to Excel

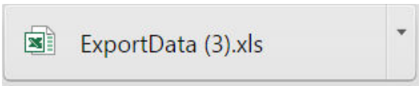
1. Display the *Provider Contracts (###)* list page. Tell me how...

   The *Provider Contracts (###)* list page is displayed. View field definitions



2. Click the **Export** icon in the task bar.

   The *Export file* tab is displayed in the lower left corner of your screen.



3. Click on the **ExportData.xls** file icon in the task bar in the lower left corner of your browser window to open the file in Microsoft Excel.

4. In Excel, you can **Save** the file with a new name and **Print** the file.

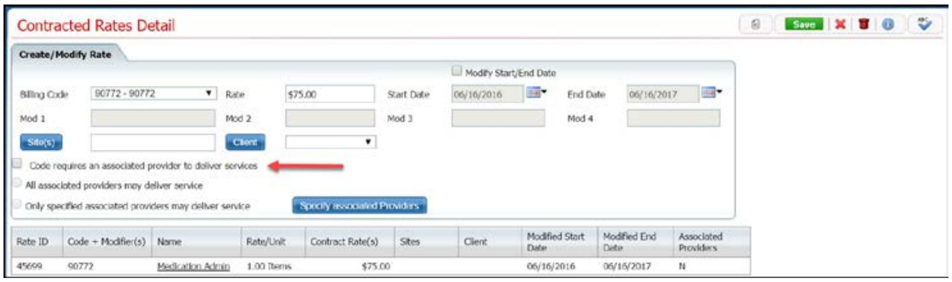
Why can't I access these screens?

Select a Provider or Site to Associate with a Contracted Rate

You can specify which providers and sites are associated with the contracted rate you are setting up. You can specify all providers or certain providers. Use this procedure to specify certain providers or sites to associate with the rate.

1. From the *Contracted Rates Detail* page, select the *Code requires an associated provider to deliver services* check box.

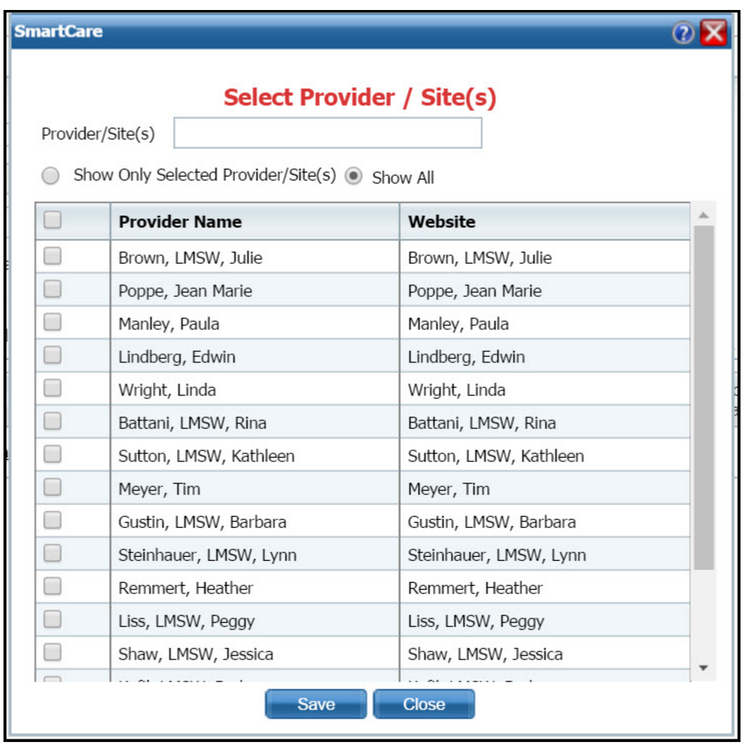
   Notice the red arrow pointing to the check box in the screen image below.



2. Select the *Only specified associated providers may deliver service* option.

3. Click the **Specify associated Providers** button.

   The *Select Provider / Site(s)* window is displayed. View field definitions.



4. Select **specific providers** from the list to display or select the **Show All** option to display all providers.

5. Type **all or partial name** in the *Provider/Site(s)* field to narrow the list of providers that is displayed.

6. Click the **Save** button to save the list of providers that you selected.

7. Click the **Close** button to close the window.

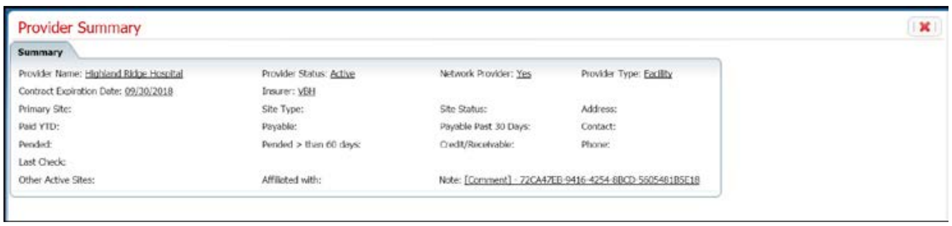
Why can't I access these screens?

View the Provider Summary Page

1. Click the drop down arrow in the **Open this Provider** drop down in the title bar. Notice the red rectangle in the screen image below for the location of the drop down list.

2. Highlight the **provider** you want to view and click on the **name** once it is highlighted.

A provider tab is opened and the *Provider Summary* page for the provider is displayed. View field definitions.



From the *Provider Summary* page, you can display the:

- *Provider Information* page
- *Contract Details* page
- *Checks* list page
- *Claim Lines (####)* list page

Why can't I access these screens?

Contracts

Add a New Provider from the Provider Tab

The providers, both institutions and professionals, who bill the Care Management organization for payment of services, are added to the Care Management system through the *Provider Contracts* module or from the *Open this Provider* drop down list.

The contract is the document that defines the relationship between the provider and the MCO to receive payments for services. The contract spells out rates, billing time spans, allowed procedures and the billing process.

Using the *Open this Provider* drop down list, you can:

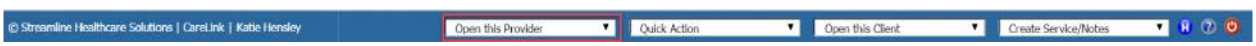
[Add a New Provider]

[Change Existing Provider Information]

[Delete a Provider]

Add a New Provider from the Open this Provider List

You can access provider information from the *Open this Provider* drop down list on the title bar.

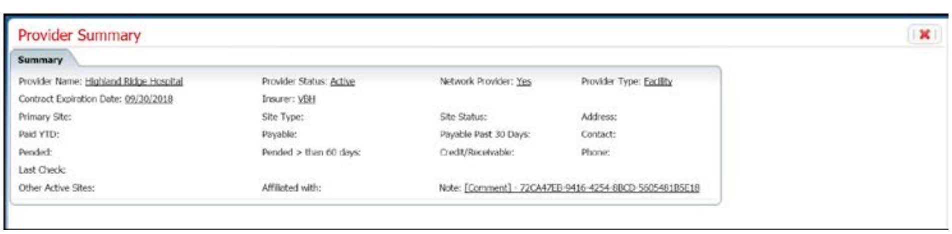


Notice the red rectangle in the screen image above. This red rectangle identifies the *Open this Provider* drop down.

To Add a Provider from the Open this Provider List

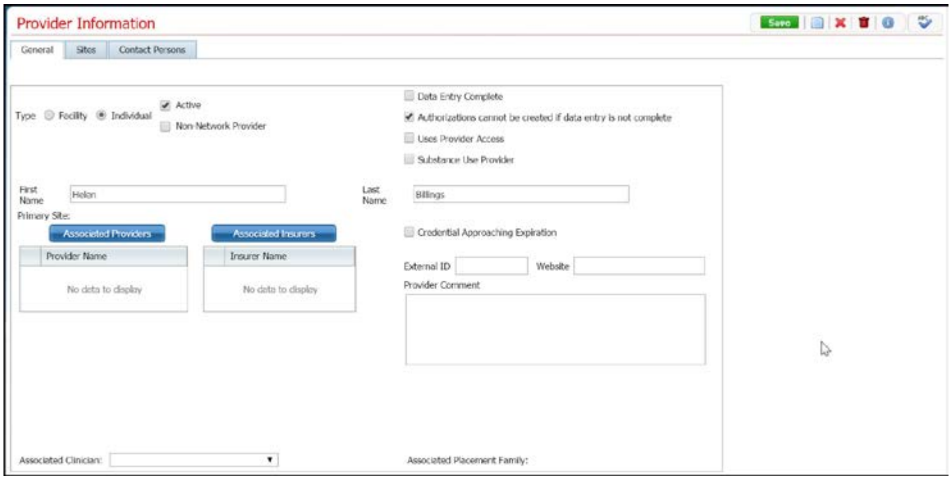
1. Click on the **drop down arrow** shown in the screen image above and select any provider from the list.

   The *Provider Summary* page is displayed with the provider's information. View [field definitions].



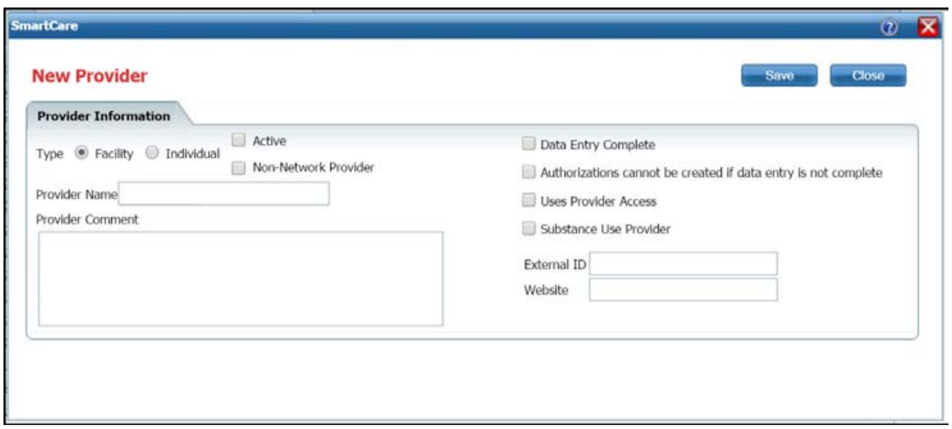
2. Click the **hyperlinked provider name**.

   The *Provider Information* page is displayed with the selected provider's information. View [field definitions].



3. To add a new provider, click the **New Item** icon. Tell me how...

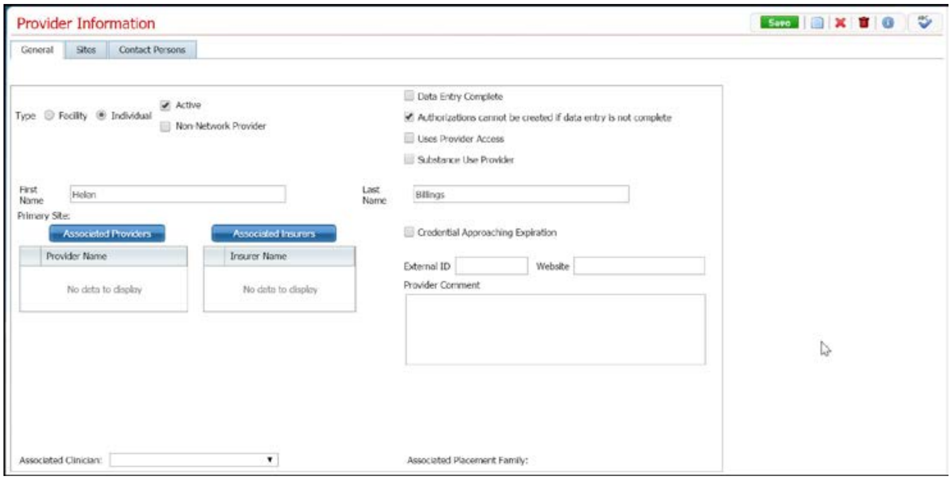
The *New Provider* window is displayed. View field definitions.



3. Complete the **New Provider** window.

4. Click the **Save** button when you are done.

The *Provider Information* page is displayed with the *General* tab active. View field definitions.

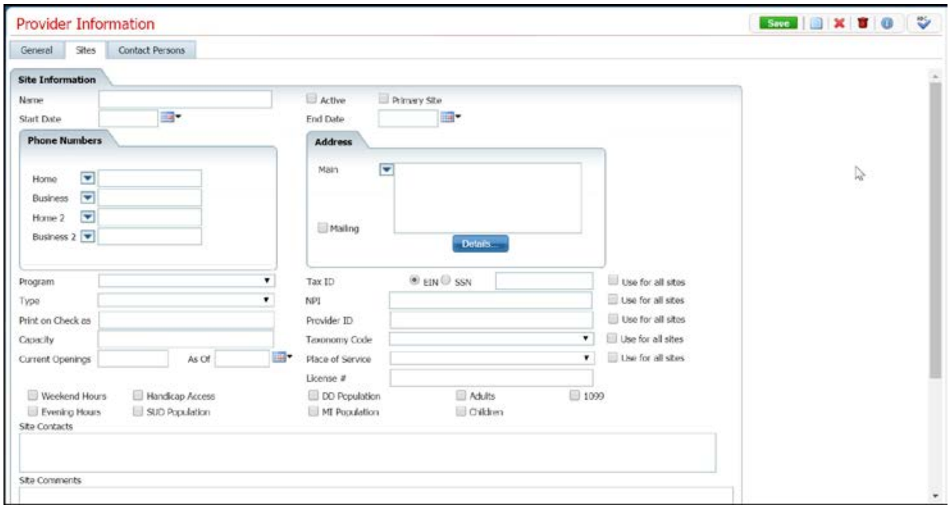


5. Complete the **General** tab.

6. Click **Save** when the *General* tab is complete.

7. Click the **Sites** tab to activate it.

   The *Sites* tab is displayed. View field definitions.

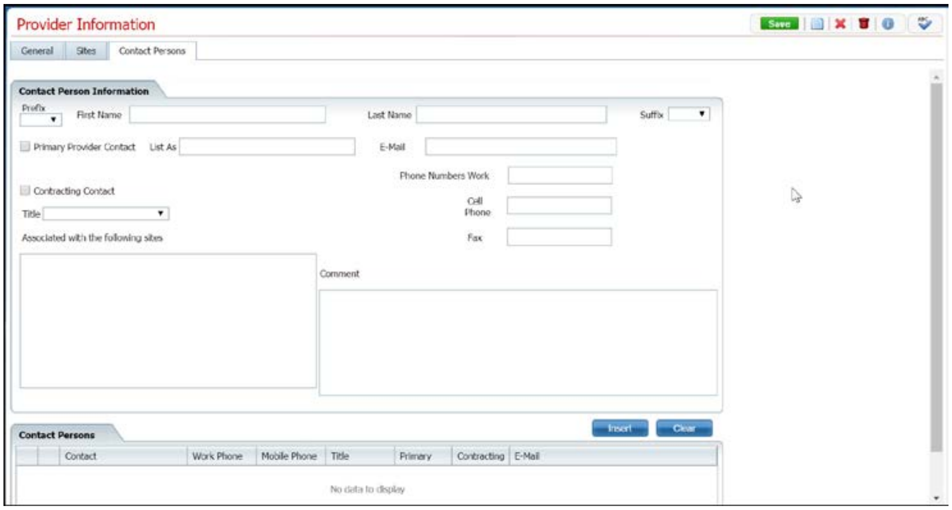


8. Complete the **Sites** tab.

9. Click the **Save** button in the task bar when you are done.

10. Click the **Contact Persons** tab to make it active.

    The *Contact Persons* tab is displayed. View field definitions.



11. Complete the **Contact Persons** tab.

12. Click the **Save** button in the task bar when you are done.

13. Click the **Exit** icon to leave the *Provider Information* page when it is complete.

    The *Provider Contracts (###)* list page is displayed.

To Change an Existing Provider

After a provider is set up in the system, use this procedure to make changes to the provider's information.

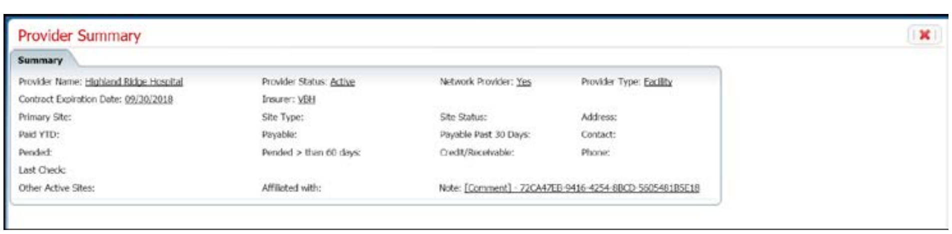
1. Click the **Open this Provider** drop down arrow on the title bar.

   Notice the red rectangle in the screen image below identifying the *Open this Provider* drop down list.

2. Select the **provider whose information you want to change** from the list. Type the first letter of the provider's last name to move quickly to that location in the list.

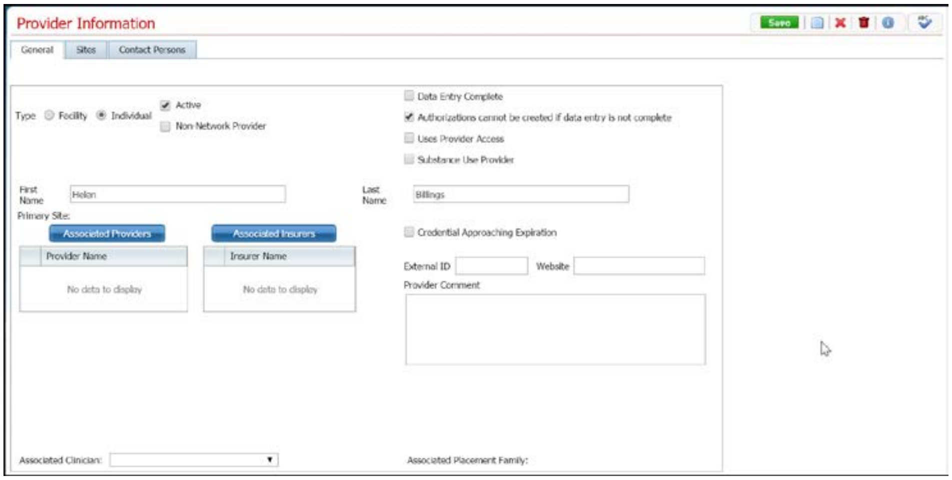
3. Click on the **name of the provider** whose information you want to display.

   The *Provider Summary* page is displayed. View [field definitions](#).



4. Click on the **Provider Name hyperlink** to display the *Provider Information* page.

   The *Provider Information* page is displayed with the *General* tab active for the provider you selected. View field definitions.

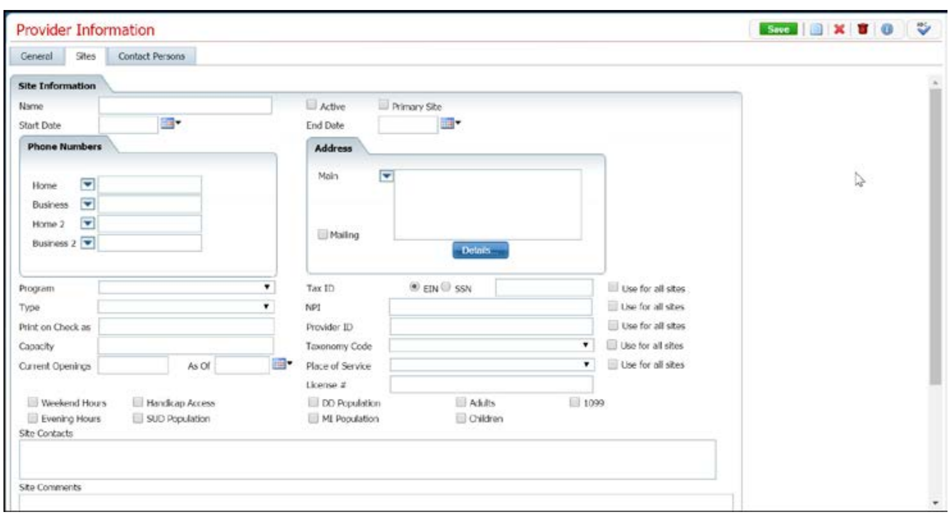


5. Make **changes** to the *General* tab, if needed.

6. Click the **Save** button in the task bar.

7. Click on the **Sites** tab to make it active.

   The *Sites* tab is displayed. View field definitions.

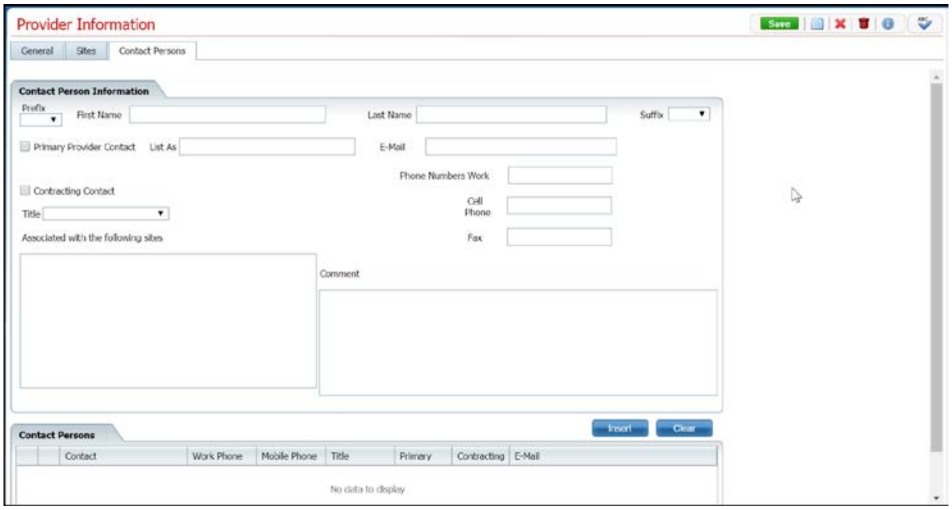


8. Make **changes** on the *Sites* tab, if needed.

9. Click the **Save** button in the task bar.

10. Click on the **Contact Person** tab to make it active.

The *Contact Person* tab is displayed. View field definitions.



11. Make **changes** on the *Contact Person* tab, if needed.

12. Click the **Save** button in the task bar.

13. If you are finished making changes to this provider, click the **Exit** icon to exit to the *Provider Summary* page.

To Delete a Provider

While it is possible to delete a provider from the system, it is very important that you do not delete a provider for whom services have been billed and/or paid. If the provider has been involved in processing of claims in the system, it will cause problems if you delete the provider.

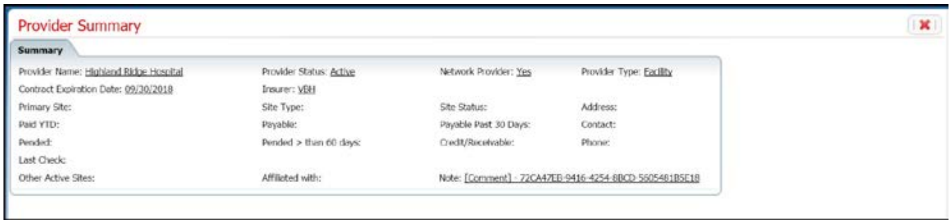
1. Click the **Open this Provider** drop down arrow on the title bar.

   Notice the red rectangle in the screen image below identifying the *Open this Provider* drop down list.

2. Select the **provider you want to delete** from the list. Type the first letter of the provider's last name to move quickly to that location in the list.

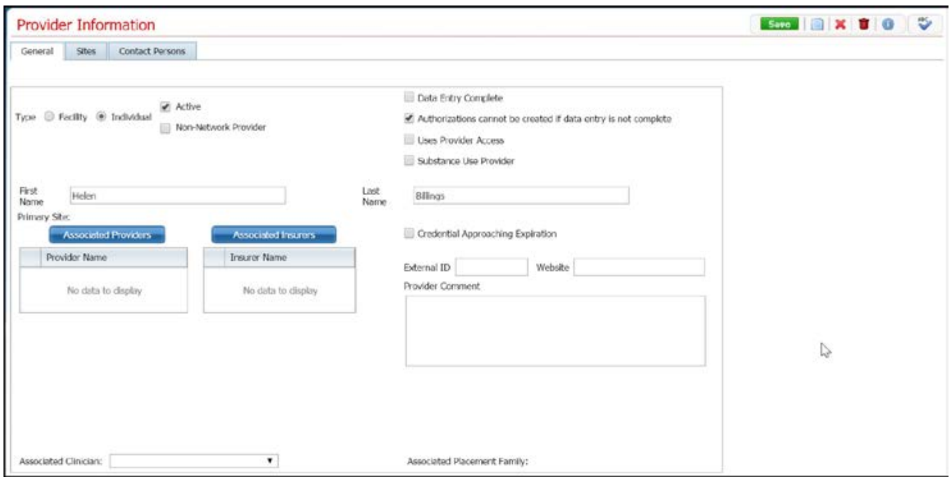
3. Click on the **name of the provider** whose information you want to display.

   The *Provider Summary* page is displayed. View field definitions.



4. Click on the **Provider Name hyperlink** to display the *Provider Information* page.

The *Provider Information* page is displayed with the *General* tab active for the provider you selected. View field definitions.



5. Click the **trash can** icon in the task bar.

6. Click the **Yes** button in the *Confirmation Message* window.

The *Dashboard* page is displayed and the provider is deleted.

Why can't I access these screens?

Add a Contract to a Provider

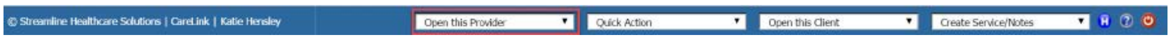
After you have added a provider to the Care Management system, you are ready to add the contract for the provider. The contract is the legal document defining the relationship between the Care Management group and each provider.

Before You Begin

Before you can set up the contract for the provider, set up the provider in the system. Refer to Enter a Provider. Once the provider is set up, you are ready to add the contract.

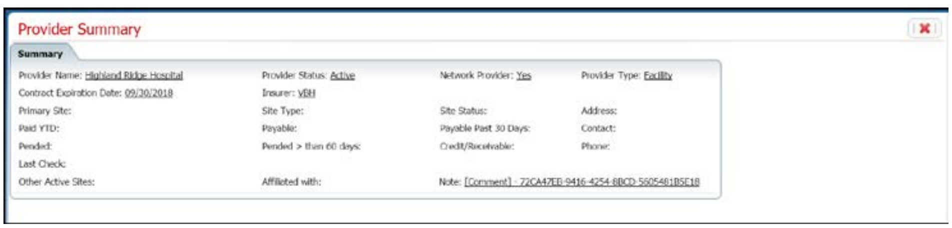
To Add a Contract to a Provider

1. Click the drop down arrow in the **Open this Provider** drop down in the title bar. Notice the red rectangle in the screen image below for the location of the drop down list.

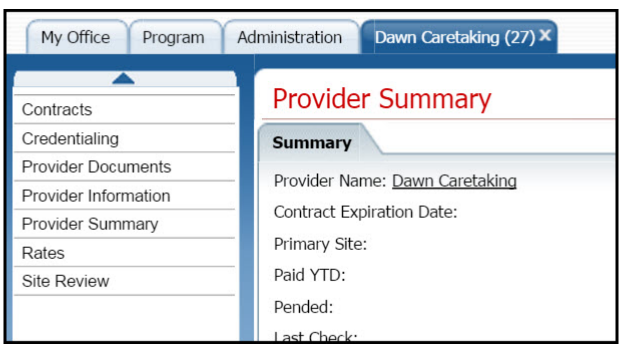


2. Highlight the **provider** you want to view and click on the **name** once it is highlighted.

   A provider tab is opened and the *Provider Summary* page for the provider is displayed. View field definitions.



   Notice the *provider tab and banners* are displayed.

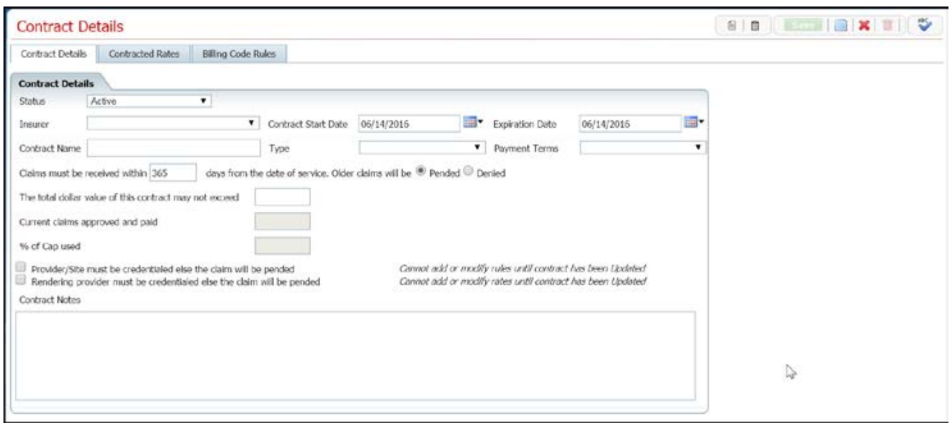


3. Click on the **Contracts** banner to select it.

   The *Provider Contracts (###)* list page is displayed. View field definitions.

4. Click the **New Item**  icon in the task bar.

   The *Contract Details* page is displayed with the *Contract Details* tab active. View [field definitions](#).



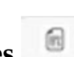
5. Complete the **Contract Details** tab.

6. When the *Contract Details* tab is complete, click the **Save** button in the task bar.

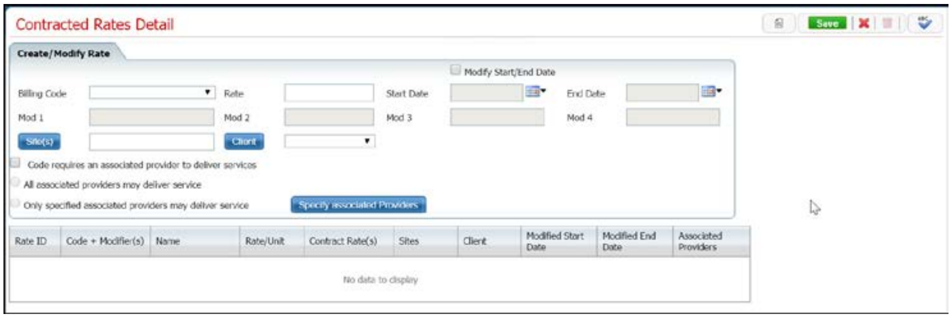
7. Click the **Contracted Rates** tab to make it active.

   The *Contracted Rates* tab is displayed. View [field definitions](#).

8. Complete the **Contracted Rates** tab.

9. To add a new *Contracted Rate* to a contract, click the **New Contracted Rates**  icon in the task bar.

   The *Contracted Rates Detail* page is displayed. View [field definitions](#).



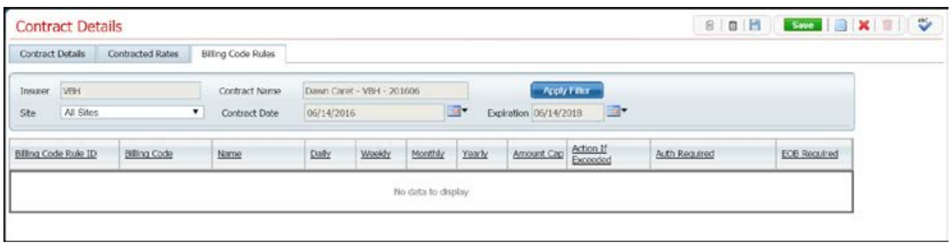
10. Complete the **Contracted Rates Detail** page.

11. Click the **Save** button in the task bar when the *Contracted Rates Detail* page is complete.

    The *Contract Details* page is displayed.

12. Click the **Billing Code Rules** tab to make it active.

    The *Billing Code Rules* tab is displayed. View field definitions.



13. Complete the **Billing Code Rules** tab.

14. To add a new *Billing Code Rule*, click the **New Billing Code Rule** icon in the task bar.

    The *Billing Code Rules Detail* page is displayed. View field definitions.

15. Complete the **Billing Code Rules Detail** page.

16. Click the **Save** button in the task bar when the *Billing Code Rules* page is complete.

17. Click the **Exit** icon in the task bar to close the *Contract Details* page.

Why can’t I access these screens?

Add a Contracted Rate to a Provider

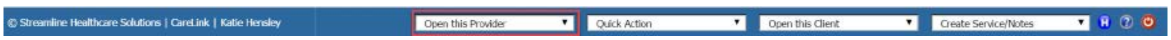
From the *Contacted Rates* tab on the *Contract Details* page, you can:

Add a New Contracted Rate to a Provider

Change a Contracted Rate for a Provider

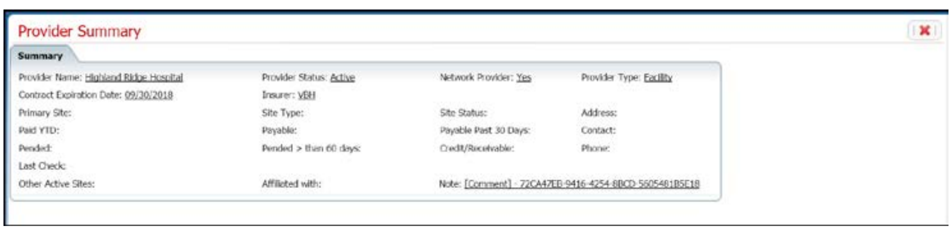
To Add a New Contracted Rate to a Provider

1. Click the drop down arrow in the **Open this Provider** drop down in the title bar. Notice the red rectangle in the screen image below for the location of the drop down list.



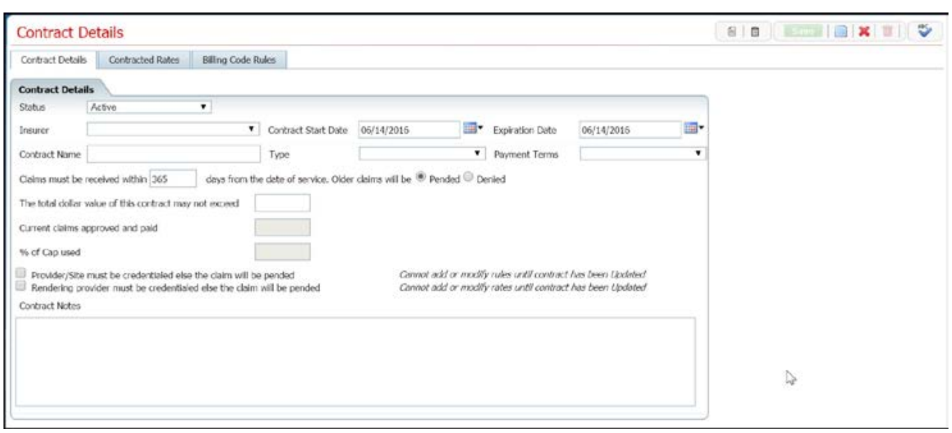
2. Highlight the **provider** you want to view and click on the **name** once it is highlighted.

   A provider tab is opened and the *Provider Summary* page for the provider is displayed. View field definitions.



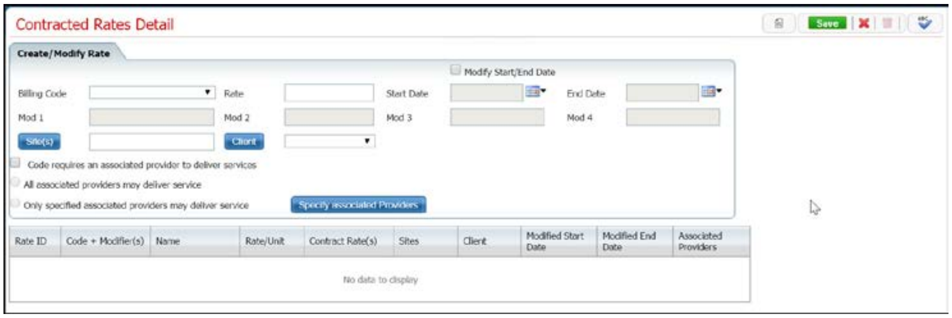
3. Click on the **hyperlinked Contract Expiration Date** to display the *Contract Details* page.

   The *Contract Details* page is displayed. View field definitions.



4. Click the **New Contracted Rates**  icon in the task bar.

The *Contracted Rates Detail* page is displayed. View field definitions.



5. Select the **Modify Start/End Date** check box to enter the *Start Date* and *End Dates*.

6. Complete the **Contracted Rates Detail** page.

7. Click the **Save** button to save the contracted rate you just added.

8. To add another contracted rate, click the **New Contracted Rates** icon. Repeat steps 5 through 7.

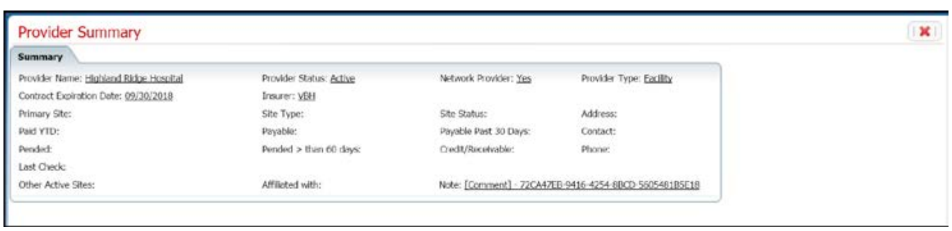
9. If you are finished adding a new contracted rate, click the **Exit** icon in the task bar.

To Change a Contracted Rate

1. Click the drop down arrow in the **Open this Provider** drop down in the title bar. Notice the red rectangle in the screen image below for the location of the drop down list.

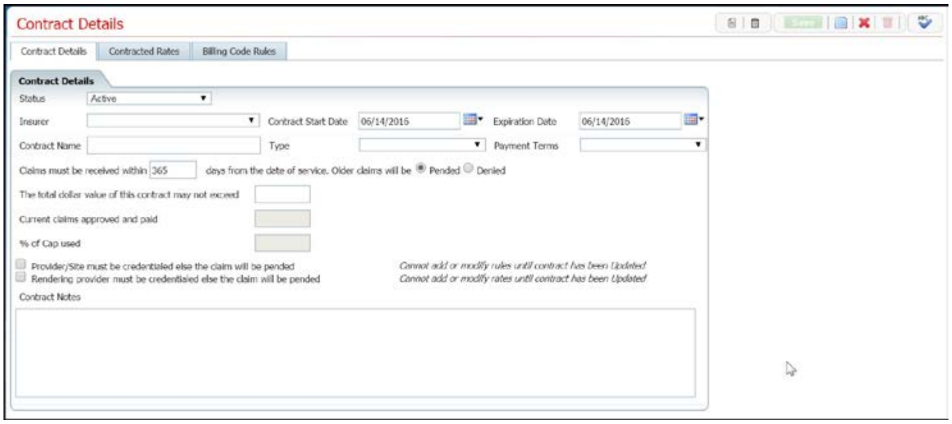
2. Highlight the **provider** you want to view and click on the **name** once it is highlighted.

A provider tab is opened and the *Provider Summary* page for the provider is displayed. View field definitions.



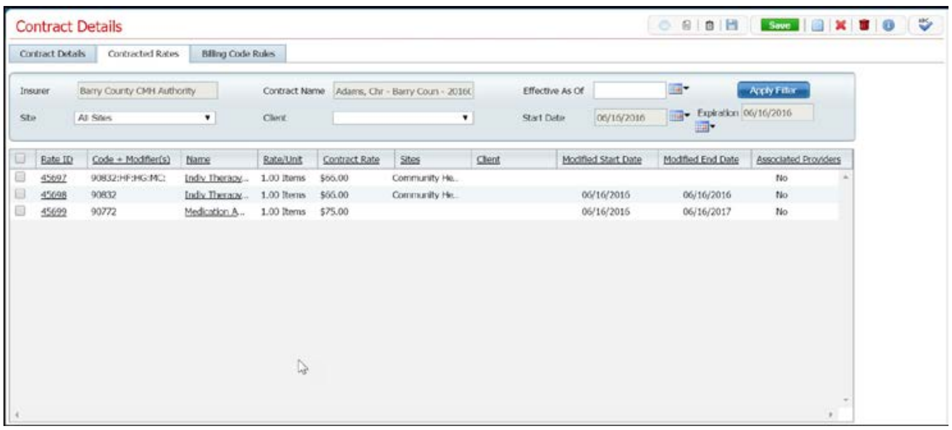
3. Click on the **hyperlinked Contract Expiration Date** in the *Provider Summary* page to display the *Contract Details* page.

The *Contract Details* page is displayed. View field definitions.



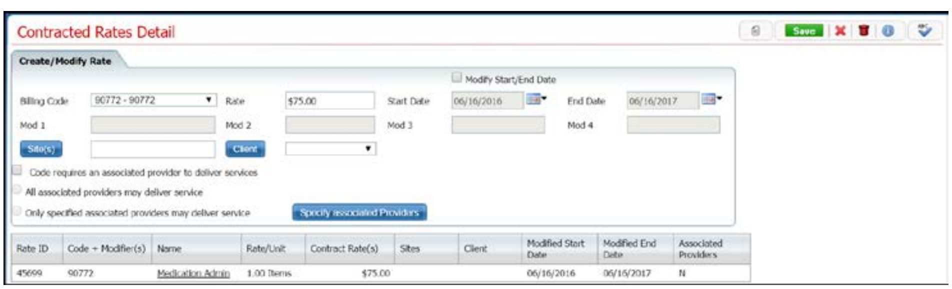
4. Click on the **Contracted Rates** tab to make it active.

   The *Contracted Rates* tab is displayed. View [field definitions](#).



5. Click on the **hyperlinked rate ID** in the *Rate ID* column for the rate you want to change.

   The *Contracted Rates Detail* page is displayed. View [field definitions](#).



6. Make **changes** to the rate as needed.

7. To change the *Start and End* dates, first, select the **Modify Start/End Date** check box just above the *Start Date* and *End Date* fields.

8. When you are done making changes, click the **Save** button in the task bar.

9. Click the **Exit** ✖ icon in the task bar to close the page.

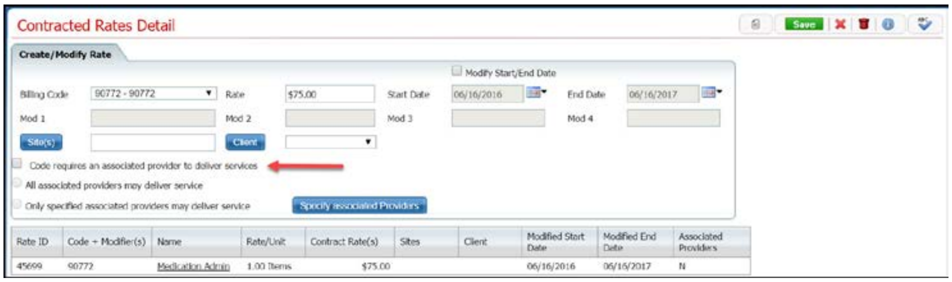
Why can’t I access these screens?

Select a Provider or Site to Associate with a Contracted Rate

You can specify which providers and sites are associated with the contracted rate you are setting up. You can specify all providers or certain providers. Use this procedure to specify certain providers or sites to associate with the rate.

1. From the *Contracted Rates Detail* page, select the *Code requires an associated provider to deliver services* check box.

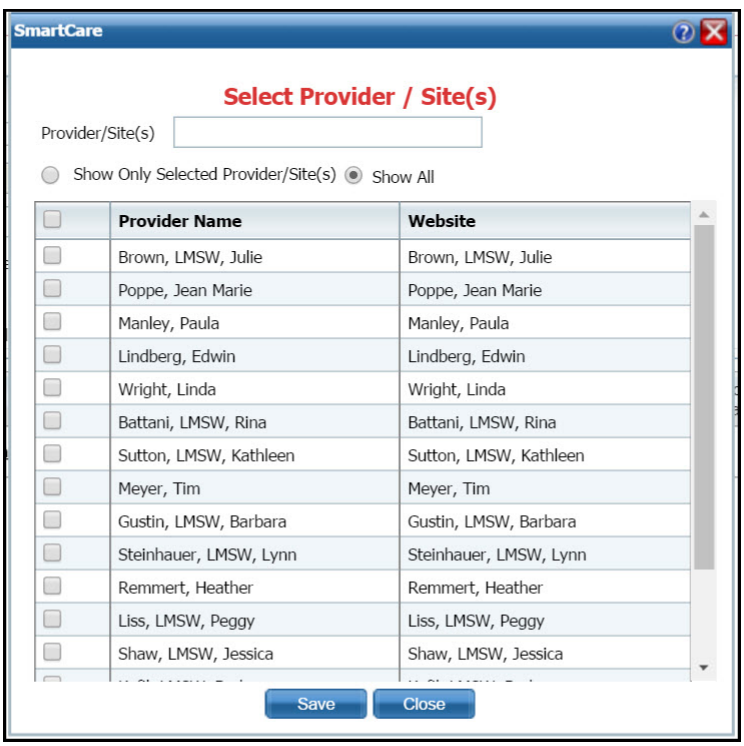
   Notice the red arrow pointing to the check box in the screen image below.



2. Select the *Only specified associated providers may deliver service* option.

3. Click the **Specify associated Providers** button.

   The *Select Provider / Site(s)* window is displayed. View field definitions.



4. Select **specific providers** from the list to display or select the **Show All** option to display all providers.

5. Type **all or partial name** in the *Provider/Site(s)* field to narrow the list of providers that is displayed.

6. Click the **Save** button to save the list of providers that you selected.

7. Click the **Close** button to close the window.

[Why can't I access these screens?]

Add a Billing Code Rule to a Provider

For each billing code that a provider can use, you can set up use rules for the code. The rule controls the:

- Number of occurrences in a specified time span
- Action to take on a claim if the rules are exceeded
- Dollar amount cap
- Whether or not authorization is required for the code
- Whether or not previous payer EOB is required.

From the *Billing Code Rules* tab in *Contract Details*, you can:

Add a Billing Code Rule to a Provider

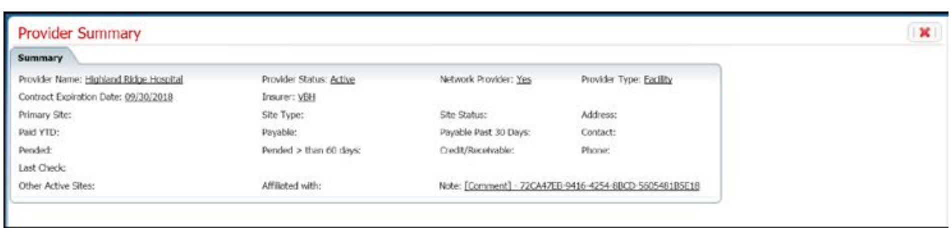
Change a Billing Code Rule for a Provider

To Add a Billing Code Rule to a Provider

1. Click the drop down arrow in the **Open this Provider** drop down in the title bar. Notice the red rectangle in the screen image below for the location of the drop down list.

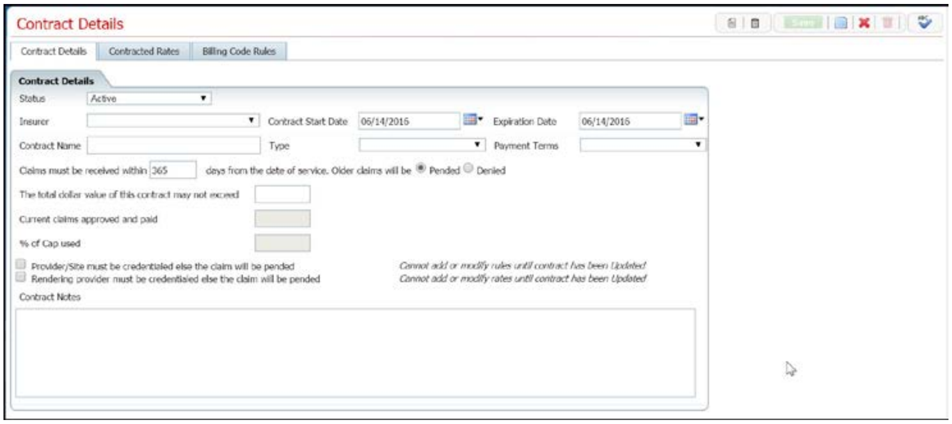
2. Highlight the **provider** you want to view and click on the **name** once it is highlighted.

   A provider tab is opened and the *Provider Summary* page for the provider is displayed. View field definitions.



3. Click on the **hyperlinked Contract Expiration Date** to display the *Contract Details* page.

   The *Contract Details* page is displayed. View field definitions.



4. Click the **New Billing Code Rules** icon in the task bar.

   The *Billing Code Rules Detail* page is displayed. View field definitions.

5. Complete the **Create/Modify Rule** section of the page.

6. When you are done, click the **Save** icon in the task bar.

7. To add another *Billing Code Rule,* click the **New Billing Code Rules** icon in the task bar. Repeat steps 5 and 6 in this procedure.

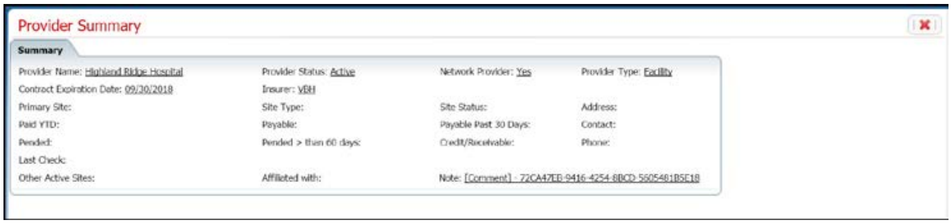
8. When you are done adding *Billing Code Rules*, click the **Exit** icon in the task bar.

To Change a Billing Code Rule for a Provider

1. Click the drop down arrow in the **Open this Provider** drop down in the title bar. Notice the red rectangle in the screen image below for the location of the drop down list.

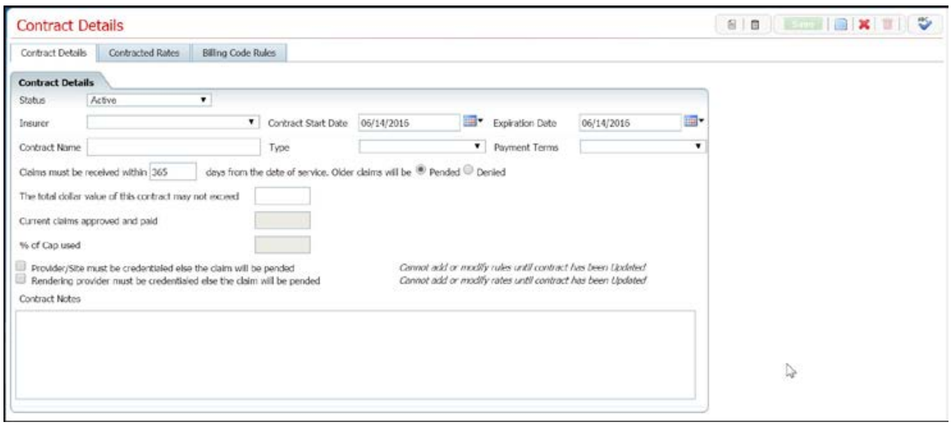
2. Highlight the **provider** you want to view and click on the **name** once it is highlighted.

   A provider tab is opened and the *Provider Summary* page for the provider is displayed. View field definitions.



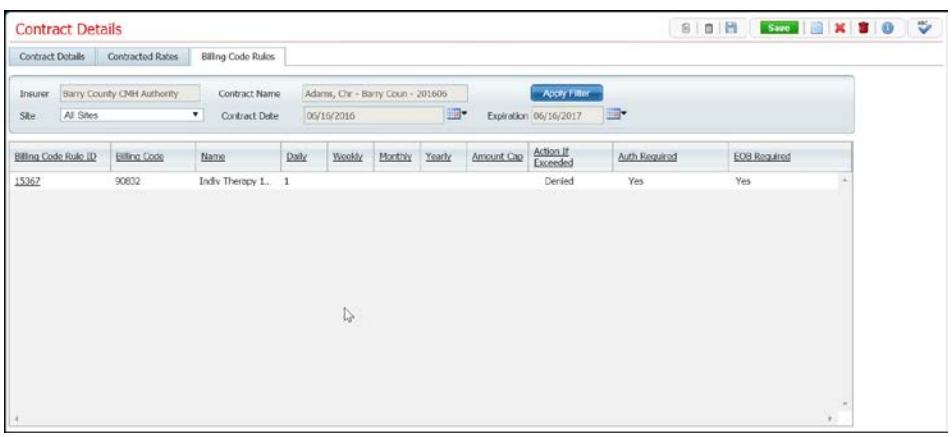
3. Click on the **hyperlinked Contract Expiration Date** to display the *Contract Details* page.

The *Contract Details* page is displayed. View field definitions.



4. Click on the **Billing Code Rules** tab to make it active.

The *Billing Code Rules* tab is displayed. View field definitions.



5. Click on the **hyperlinked billing code rule ID number** in the *Billing Code Rule ID* column.

The *Billing Code Rules Detail* page is displayed. View field definitions.

6. Make changes to the billing code rule.

7. When you are done, click the **Save** icon in the task bar.

8. When you are done changing *Billing Code Rules*, click the **Exit** icon in the task bar.

Why can’t I access these screens?

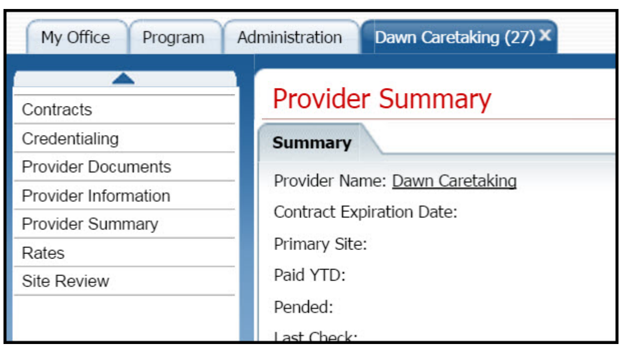
Export a List of a Provider's Contracts to Excel

1. Click the drop down arrow in the **Open this Provider** drop down in the title bar. Notice the red rectangle in the screen image below for the location of the drop down list.

2. Highlight the **provider** you want to view and click on the **name** once it is highlighted.

A provider tab is opened and the *Provider Summary* page for the provider is displayed. View [field definitions](#).

Notice the *provider tab and banners* are displayed.

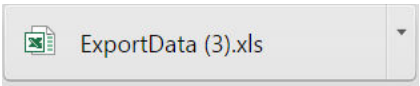


3. Click on the **Contracts** banner to select it.

The *Provider Contracts (###)* list page is displayed. View [field definitions](#).

4. Click on the **Export**  icon in the task bar.

The *Export file* tab is displayed in the lower left corner of your screen.



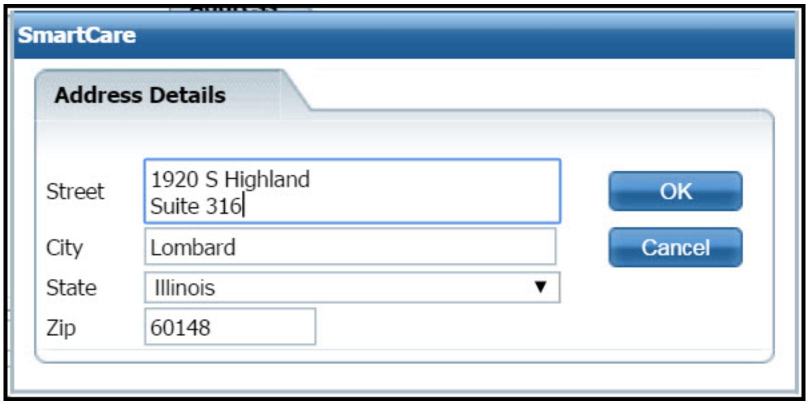
5. Click on the **ExportData** file icon in the task bar in the browser window to open the file in Microsoft Excel.

6. In Excel, you can **Save** the file with a new name and **Print** the file.

[Why can't I access these screens?]

Field Definitions

Address Details Window Field Definitions



A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

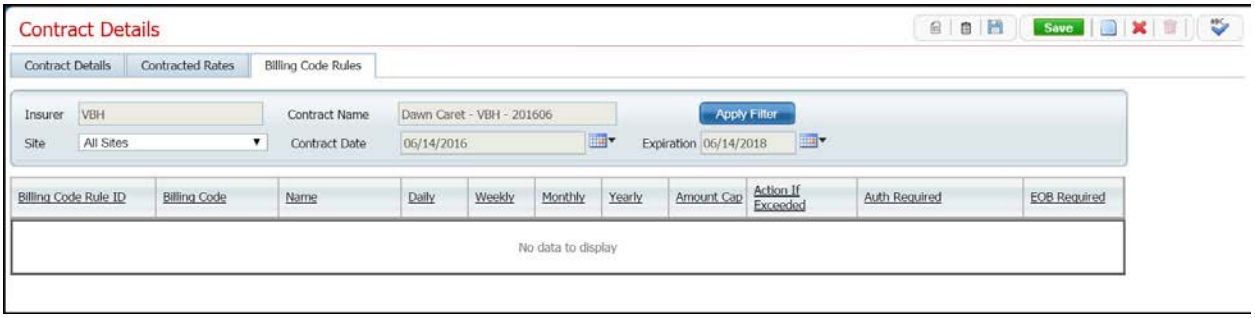
Field	Required?	Description
Street		Identifies the number and street name. You can enter up to three lines in the field. You can enter 30 characters in the first two lines and 10 characters in the third line. Press the Enter key to control the line breaks.
City		Identifies the city in the address. You can enter up to 210 characters on one line.
State		Identifies the state for the address. Select the state name from the drop down list or type the first 2 or 3 characters of the state name to display the states that match.
Zip		Identifies the ZIP code in the address. You enter a five-digit ZIP code. You can also add the hyphen and the four-digit ZIP+4 code.
Mailing		Identifies which address is the mailing address for the provider. Display the mailing address in the panel and select the Mailing check box to identify the mailing address.

Billing Code Rules Detail Page Field Definitions

A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Create/Modify Rule		
Billing Code		Identifies the billing code you are creating the rule for.
Daily		Identifies whether or not there is a limit on the number of occurrences for the time span. Select *Unlimited* if there is not limit or if there is a limit, select the other radio button and enter the number of occurrences that are allowed each day.
Weekly		Identifies whether or not there is a limit on the number of occurrences for the time span. Select *Unlimited* if there is not limit or if there is a limit, select the other radio button and enter the number of occurrences that are allowed each week.
Monthly		Identifies whether or not there is a limit on the number of occurrences for the time span. Select *Unlimited* if there is not limit or if there is a limit, select the other radio button and enter the number of occurrences that are allowed each month.
Yearly		Identifies whether or not there is a limit on the number of occurrences for the time span. Select *Unlimited* if there is not limit or if there is a limit, select the other radio button and enter the number of occurrences that are allowed each year.
Action If Exceeded		Identifies the action the system takes on a claim if the number of occurrences exceeds the limits set. Options are to: • Deny the claim • Pend the claim
Amount Cap		Identifies if there is a dollar amount limit on how much can be billed for the code.
Standard Rule		
Authorization Required		Identifies whether or not authorization is required from the insurer for whether or not the claim will be processed and paid if all other billing rules are met.
Previous Payer EOB Required		Identifies whether or not Explanation of Benefits (EOB) information is required to be entered if the client is covered by multiple insurers.

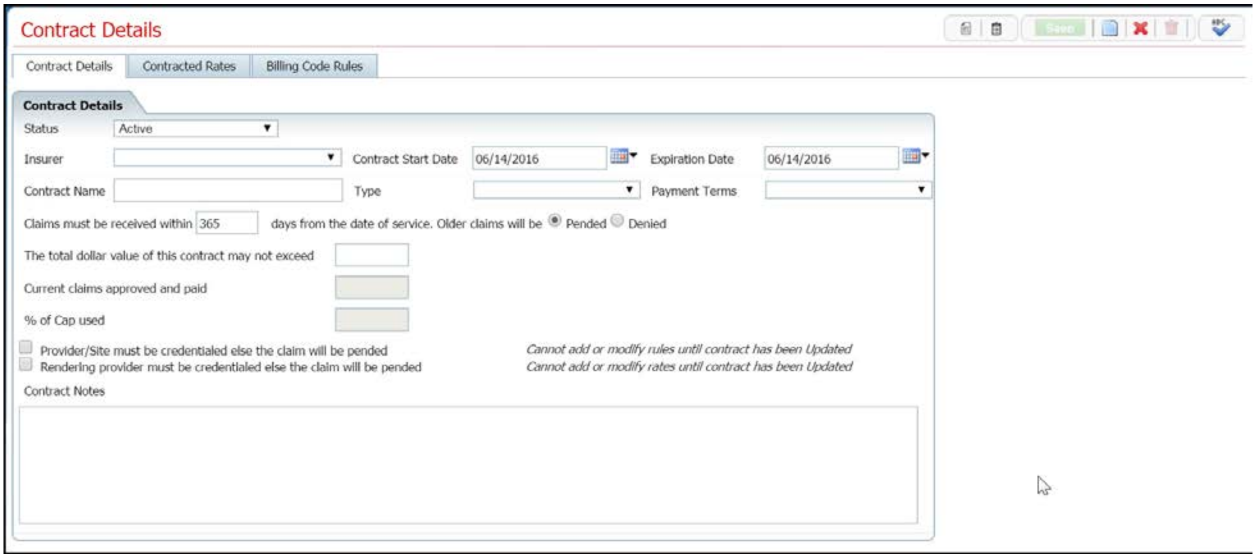
Contract Details Page Billing Code Rules Tab Field Definitions



A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Filter		
Insurer		Identifies the insurer that the provider is contracted with for payment. The entry defaults in this field.
Contract Name		Identifies the name entered for the contract.
Site		Select from the drop-down list to filter records to display in the List area of the page. Options are: • All Sites • Choose a site set up for the provider in the system
Contract Date		Identifies the start date of the contract entered on the *Contract Details* tab.
Expiration		Identifies the expiration date entered for the contract on the *Contract Details* tab.
List		
Billing Code Rule ID		Identifies the number assigned by the system when the billing code rule was created.
Billing Code		Identifies the billing code entered into the system for which the billing rule was set up.
Name		Identifies the descriptive name of the billing code.
Daily		Identifies the number of times a day the service can be provided and be covered by the insurer.
Weekly		Identifies the number of times a day the service can be provided and be covered by the insurer.
Monthly		Identifies the number of times a day the service can be provided and be covered by the insurer.
Yearly		Identifies the number of times a day the service can be provided and be covered by the insurer.
Amount Cap		Identifies the dollar amount limit that can be claimed for this billing code.
Action If Exceeded		Identifies the action the system takes when processing claims, if the amount exceeds the limits set in the rule. Options are: • Deny • Pend
Auth Required		Identifies whether or not authorization is required for providing the service.
EOB Required		Identifies whether or not Explanation of Benefits (EOB) information is required to be entered in the system when the client is covered by multiple insurers.

Contract Details Page Field Definitions

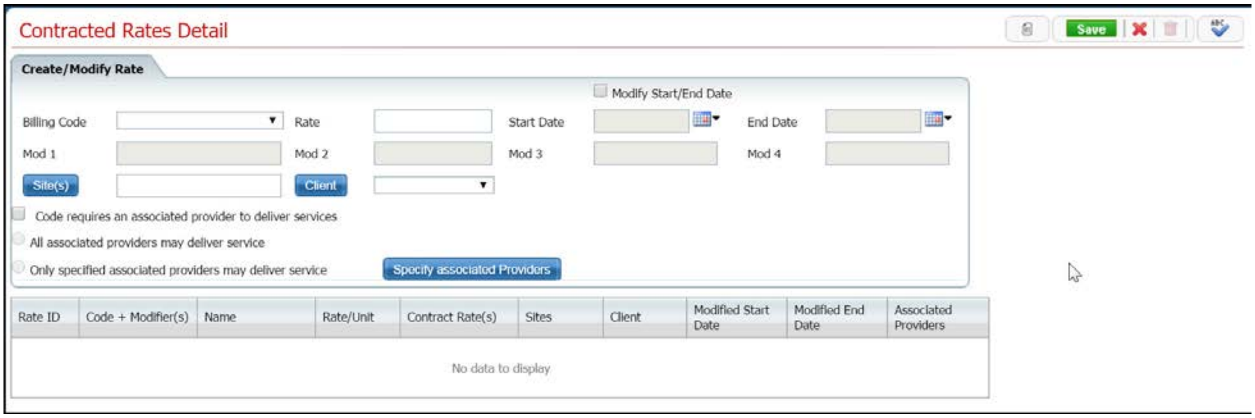


A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Contract Details		
Status	Yes	Identifies the status of the contract process in the system.
Insurer	Yes	Identifies the insurer who will pay the charges submitted by the provider.
Contract Start Date	Yes	Identifies the start date for the contract to become effective.
Expiration Date	Yes	Identifies the expiration date of the contract.
Contract Name	Yes	Identifies the contract name assigned by the system. You can edit this name, if needed.
Type	Yes	Identifies the type of contract being put in effect. Choices are: • Addendum to Signed Contract • Letter of Intent • Non-Par Conversion Agreement • Other • Signed Contract • Verbal Agreement - By Phone • Verbal Agreement - Face to Face
Payment Terms	Yes	Where does this come from???
Claims must be received within __ days from the date of service.	Yes	Identifies the time span that is required to submit claims for processing from the date of service.
Older claims will be Pended Denied	Yes	Identifies what happens to claims that miss the number of days received from the date of service entered in the previous field. choices are: • Pended • Denied

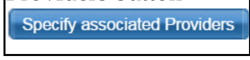
Field	Required?	Description
The total dollar value of this contract may not exceed		Identifies a total dollar amount that can be paid to the provider for the duration of the contact.
Current claims approved and paid		Identifies the current dollar total of claims that have been approved and paid. This value is provided by the system.
% of Cap used		Identifies the percentage of the payment cap that has been paid so far. This value is provided by the system.
Provider/Site must be credentialed else the claim will be pended		Identifies whether or not the provider and/or site need to be credentialed to have claims approved. If the check box is selected, then claims are pended if the provider and/or site are not credentialed.
Rendering provider must be credentialed else the claim will be pended		Identifies whether or not the contract specifies that the rendering provider must be credentialed. If this check box is selected, then the rendering provider must be credentialed or the claims is pended.
Contract Notes		Identifies any comments entered about the contract. You can enter an unlimited number of characters in the *Notes* field. When the notes are entered, you can run spell check on the notes that are entered. Tell me how...

Contracted Rates Detail Page Field Definitions

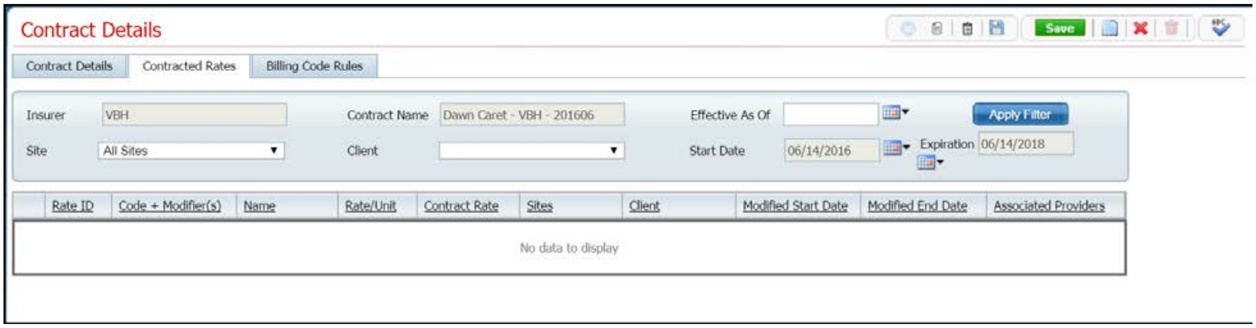


A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Create/Modify Rate		
Modify Start/End Date		Identifies whether or not the *Start Date* and *End Date* fields are active or grayed out. Select the check box to change the start and end dates.
Billing Code		Identifies the *Billing Code* you are setting the contracted rate for.
Rate		Identifies the dollar amount of the charge for the billing code. You can enter up to 8 digits. The system adds the dollar sign, a decimal point and 2 trailing zeros.
Start Date		Select the **Modify Start/End Date** check box to make this field active. Use the *calendar icon* to select a start date for the contracted rate.
End Date		Select the **Modify Start/End Date** check box to make this field active. Use the *calendar icon* to select an end date for the contracted rate.
Mod 1		If the billing code selected in the *Billing Code* field has modifiers added to it, the modifiers are displayed in this field. Up to four modifiers can be added to the billing code.
Mod 2		If the billing code selected in the *Billing Code* field has modifiers added to it, the modifiers are displayed in this field. Up to four modifiers can be added to the billing code.
Mod 3		If the billing code selected in the *Billing Code* field has modifiers added to it, the modifiers are displayed in this field. Up to four modifiers can be added to the billing code.
Mod 4		If the billing code selected in the *Billing Code* field has modifiers added to it, the modifiers are displayed in this field. Up to four modifiers can be added to the billing code.
Site(s) button Site(s)		Use the **Site(s)** button to select the site where the billing code and rate applies.
Client button Client		Use the **Client** button to select a client who uses the code and contacted rate.
Code requires an associated provider to deliver services		Select the check box to indicate that the contracted rate requires an associated provider to provide the service at the specified rate. Once this check box is selected, select one of the other options.

Field	Required?	Description
All associated providers may deliver service		Use this radio button to indicate that all associated providers set up in the system can provide the service for this contracted rate.
Only specified associated providers may deliver service		Use this radio button to indicate that only the selected associated providers can provide the service at the listed rate. To specify an associated provider, click the button and complete the *Select Provider / Site(s)* window. Tell me how...
Specify associated Providers button 		If you select the *Code requires an associated provider to deliver services* check box and then select the *Only specified associated providers may deliver service* option, use the **Specify associated Providers** button to select the providers to associate to deliver service for this contracted rate.

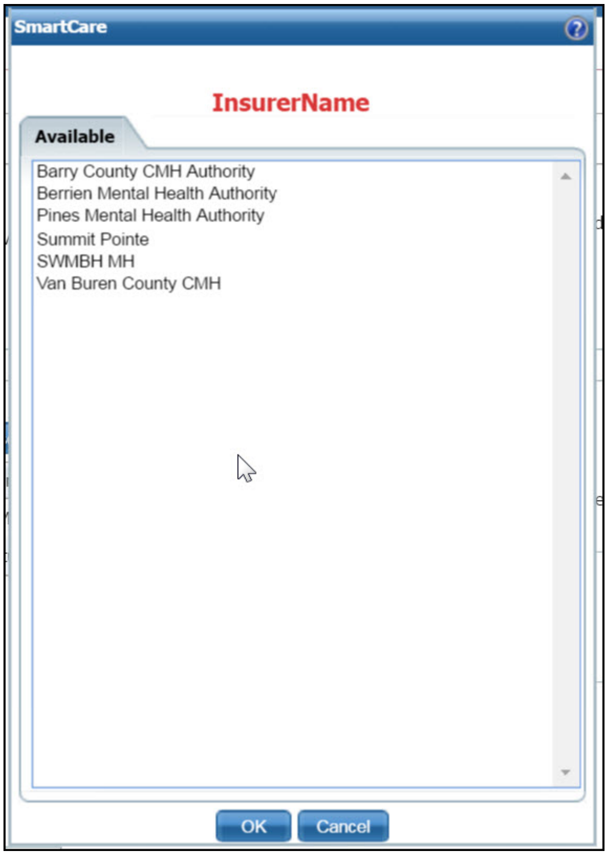
Contracted Rates Tab Field Definitions



A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Filter		
Insurer		Identifies the insurer with whom the contract defines the business relationship with the MCO.
Contract Name		Identifies the name of the contract. The name is assigned by the system when the contract is added, but can be revised by the user.
Effective As Of		Identifies the effective dates of contracted rates to filter the list.
Site		Identifies the site where the contracted rates apply.
Client		If a contracted rate is assigned to a specific client, identifies the client you want to filter the list for.
Start Date		Identifies the start date of the contract with this insurer.
Expiration		Identifies the expiration date of the contract with this insurer.
List		
Rate ID		Identifies the ID assigned by the system when the contracted rate was added.
Code + Modifier(s)		Identifies the procedure code and any modifiers for which the contracted rate was set up.
Name		Identifies the name of the procedure code.
Rate/Unit		Identifies the number of units the contracted rate applied to.
Contract Rate		Identifies the dollar amount that is contracted to be paid for the service.
Sites		Identifies the site where the service and rate can be assigned.
Client		If the contracted rate is set up for a specific client, identifies the client the rate is for.
Modified State Date		If the start and end dates have been modified on the contract details page, identifies the modified start date.
Modified End Date		If the start and end dates have been modified on the contract details page, identifies the modified end date.
Associated Providers		Identifies whether or not providers have been associated with this provider and contract.

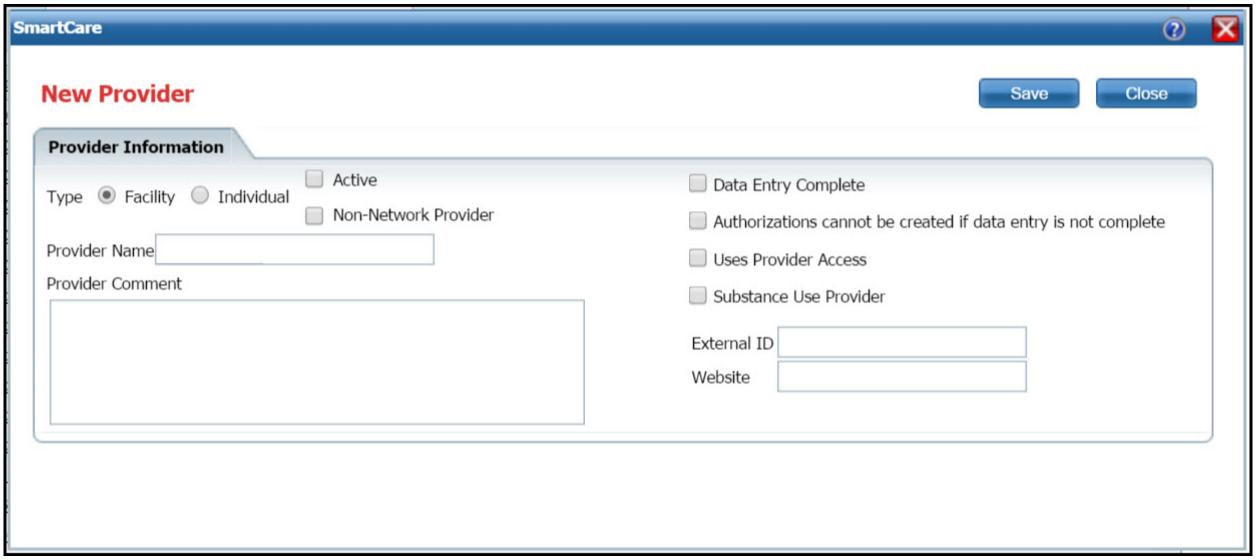
Insurer Name Window Field Definitions



A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Available		
Names		List of insurers set up in the system. Select the insurer you want to add as an associated insurer on the *Provider Information* page *General* tab.

New Provider Window Field Definitions

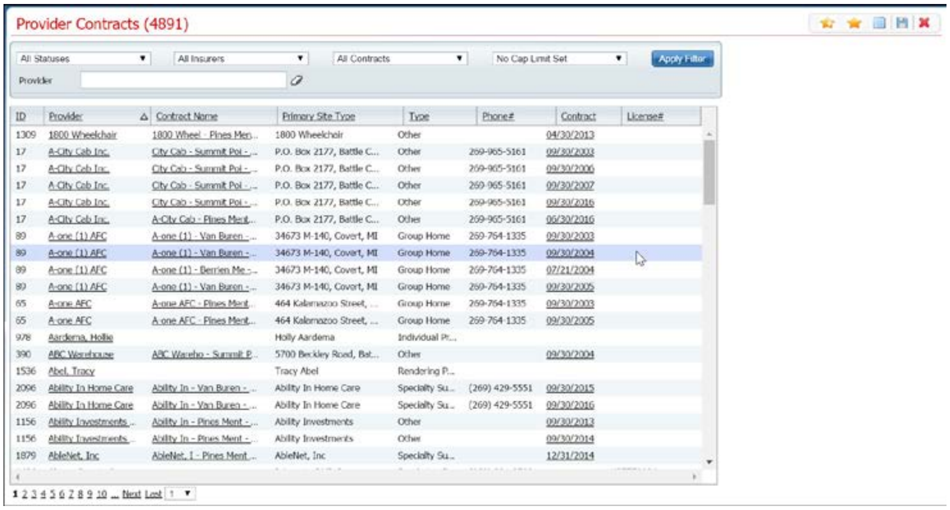


A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Provider Information		
Type		Select either the Facility or Individual radio button to identify what type of provider you are setting up. • Facility • Individual
Active		If checked, identifies the provider is actively seeing clients and billing for services.
Non-Network Provider		If checked, identifies the provider is a non-network provider. Informational use only.
Provider Name		Identifies the provider throughout the SmartCare system. You can enter up to 30 characters.
Provider Comment		Identifies information that you enter amount the provider. You can enter unlimited number of characters in this field. This information does not appear anywhere else in the system.
Data Entry Complete		Identifies the data entry to set up this provider is complete. When you check this check box what happens in the system?
Authorization cannot be create if data entry is not complete		Identifies that services cannot be paid since authorization cannot be created unless the *Data Entry Complete* check box is selected.
Uses Provider Access		Identifies that this provider has access to the Care Management system to enter claims, review and fix denied claims and view payments.
Substance Use Provider		Identifies that this provider is a substance abuse provider. Being identifies as a substance abuse provider allows records to be created for a client separate from the master record and unique to the provider. If the provider is a designated as a substance abuse provider, can have multiple records that contain information for specific providers.

Field	Required?	Description
External ID		An ID that you can enter for a provider that is not assigned by the system. For example, if you have an existing set of IDs for providers before you implement Care Management, you can enter that ID for the provider.
Website		Identifies the URL for the provider’s website. Information only field.

Provider Contracts List Page Field Definitions

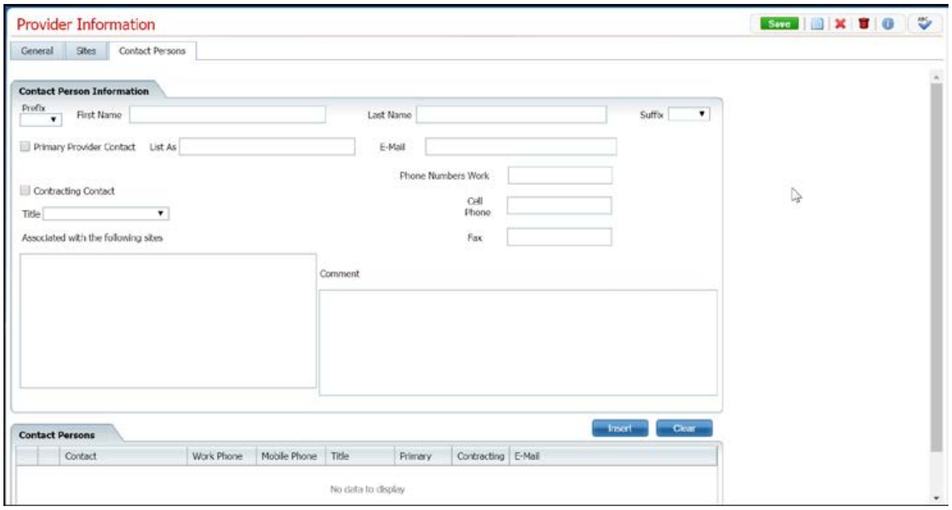


A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Filter		
All Statuses		Select from the drop-down list to filter records to display in the *List* area of the page. Options are: • All Statuses • Active Only • Active and Complete Data Entry • Active and Incomplete Data Entry • Incomplete Data Entry • Inactive Only
All Insurers		Select from the drop-down list to filter records to display in the *List* area of the page. Options are: • All Insurers • Choose an insurer to display the contract record
All Contracts		Select from the drop-down list to filter records to display in the List area of the page. Options are: • All Contracts • Contracts past due • Current Contracts • Contracts expiring in 7 days • Contracts expiring in 14 days • Contracts expiring in 30 days • Contracts expiring in 60 days • Contracts expiring in 90 days

Field	Required?	Description
No Cap Limit Set		Select from the drop-down list to filter records to display in the List area of the page. A cap limit identifies a dollar amount limit allowed annually. The cap limit identifies how close the paid services total is to the cap limit. Options are: • No Cap Limit Set • Cap limit currently 75% • Cap limit currently 80% • Cap limit currently 85% • Cap limit currently 90% • Cap limit currently 95% • Cap limit currently exceeded
Provider		Enter all or some of a provider's name to search for the specific provider.
Eraser icon		Use the Eraser icon to erase data entered in the *Provider* field.
List		
ID		Identifies the system-assigned ID number for the provider when the provider was entered into the system.
Provider		Identifies the name of the provider as it appears throughout the system. Click the hyperlinked name to view the *Provider Summary* page and access the *Provider Information* page.
Contract Name		Identifies the name of the provider as it appears on the contract. Click the hyperlinked contract name to the view the *Contract Details* pages.
Primary Site Type		Identifies the primary site where services are rendered to clients.
Type		Identifies the type of provider. Types are: • Clinic • Crisis Residential • Drop-In Center • Group Home • Hospital
Phone#		Identifies the contact phone number for the provider.
Contract		Identifies the date the contract was activated. Click the hyperlinked date to view contract details.
License#		Identifies the license number for an individual professional provider.

Provider Information Page Contact Persons Tab Field Definitions

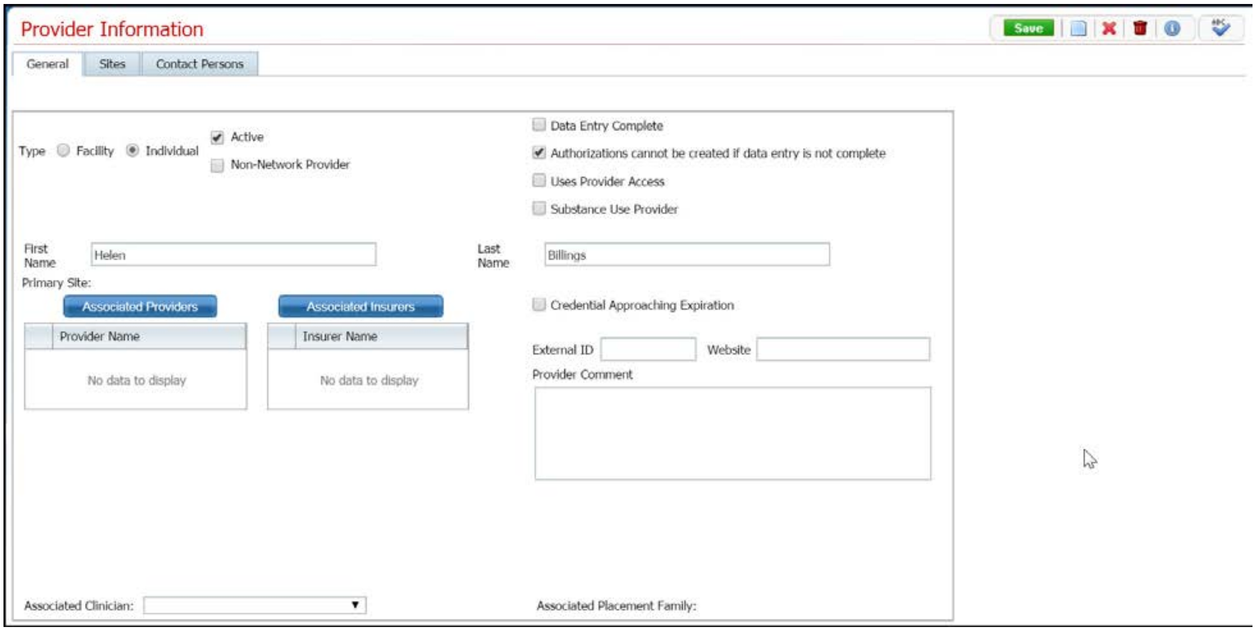


A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Contact Person Information		
Prefix		Identifies the prefix the provider prefers or leave blank.
First Name		Identifies the provider's first name. You can enter up to 30 characters.
Last Name		Identifies the provider's last name. You can enter up to 30 characters.
Suffix		Identifies the suffix preferred by the provider or leave blank
Primary Provider Contact		Identifies whether or not this is the contact person for the primary provider.
List As		Identifies the name as it will appear throughout the system.
E-mail		Identifies the providers email address.
Phone Numbers Work		Identifies the provider's contact person's work number.
Contracting Contact		Identifies whether or not this person is the person to contact regarding the provider's contract.
Cell Phone		Identifies the contact person's cell phone number.
Title		Identifies the contact person's title.
Fax		Identifies the contact person's fax number.
Associated with the following sites		Identifies the sites the contact person is associated with.
Comment		Identifies any comment entered about the contact person. You can enter an unlimited number of characters. When you are finished entering comments, you can run spell check on your entry. Tell me how...
Contact Persons List		
Delete item icon		Use the **delete** icon to delete provider contact person from the list panel.
Radio button icon		Use the **radio button** icon to select a record to change information on the provider.

Field	Required?	Description
Contact		Identifies the contact's name as shown in the *List As* field.
Work Phone		Identifies the contact's work phone number.
Mobile Phone		Identifies the contact's cell phone number.
Title		Identifies the contact's title.
Primary		Identifies whether this contact is affiliated with the primary provider.
Contracting		Identifies whether the contact is associated with the provider's contract.
E-mail		Identifies the contact's email address.

Provider Information Page Field Definitions

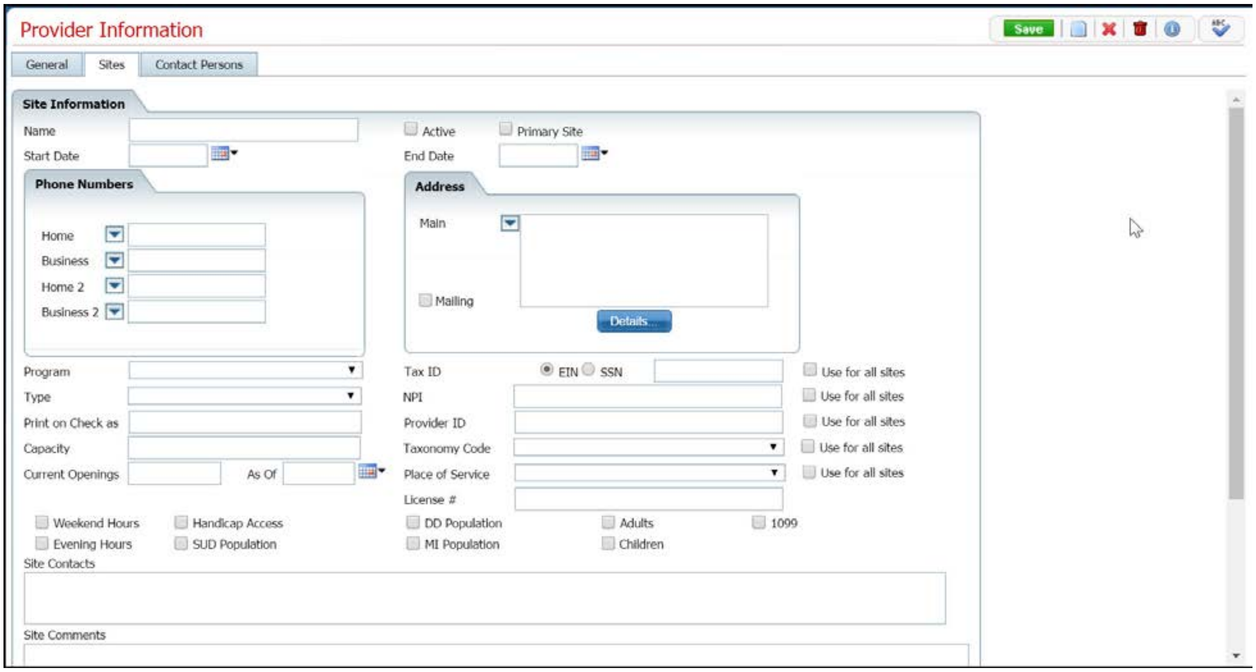


A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
General Tab		
Type		Select either the Facility or Individual radio button to identify what type of provider you are setting up. • Facility • Individual
Active		If checked, identifies the provider is actively seeing clients and billing for services.
Non-Network Provider		If checked, identifies the provider is a non-network provider.
Provider Name		Identifies the provider throughout the SmartCare system. You can enter up to 30 characters.
Primary Site		Identifies the primary site where the provider provides services to clients.
Data Entry Complete		Identifies the data entry to set up this provider is complete.
Authorization cannot be create if data entry is not complete		Identifies that services cannot be paid since authorization cannot be created unless the *Data Entry Complete* check box is selected.
Uses Provider Access		Identifies that this provider has access to the Care Management system to enter claims, review and fix denied claims and view payments.
Substance Use Provider		Identifies that this provider is a substance abuse provider. Being identified as a substance abuse provider allows records to be created for a client separate from the master record and unique to the provider. If the provider is a designated as a substance abuse provider, the client can have multiple records that contain information for specific providers.

Field	Required?	Description
Associated Providers button Associated Providers		Use the **Associated Providers** button to list the providers who provide services with or for the provider you are setting up. Tell me how...
Associated Providers list		
Delete item icon		Use the **delete** icon to delete an associated provider from the list panel.
Provider Name		Identifies the provider name entered when the provider was set up in the system.
Associated Insurers button Associated Insurers		Use the **Associated Insurers** button to display the list of insurers that the provider can bill for services to clients. Insurers listed in this field are needed to set up a contract for the provider. Tell me how...
Associated Insurers list		
Delete item icon		Use the **delete** icon to delete an associated provider from the list panel.
Insurer Name		Identifies the name of the insurer that was entered when the insurer was set up in the system.
Credential Approaching Expiration		If checked, identifies the provider's credentials are nearing the expiration date. This information is displayed on the Dashboard and can be used to run a report that lists those providers whose credentials are expiring.
External ID		Identifies that an external ID has been assigned to the provider.
Website		Identifies the provider's website for informational purposes.
Provider Comment		Identifies additional information about the provider. This comment is displayed on the *Provider Summary* page. You can run unlimited number of characters in this field. You can run spell check on this field after you finish entering text. Tell me how...
Associated Clinician		Identifies the clinician name used to bill for the provider to other insurance plans.
Associated Placement Family		Identifies the placement family that is associated with this provider for foster care.

Provider Information Page Sites Tab Field Definitions



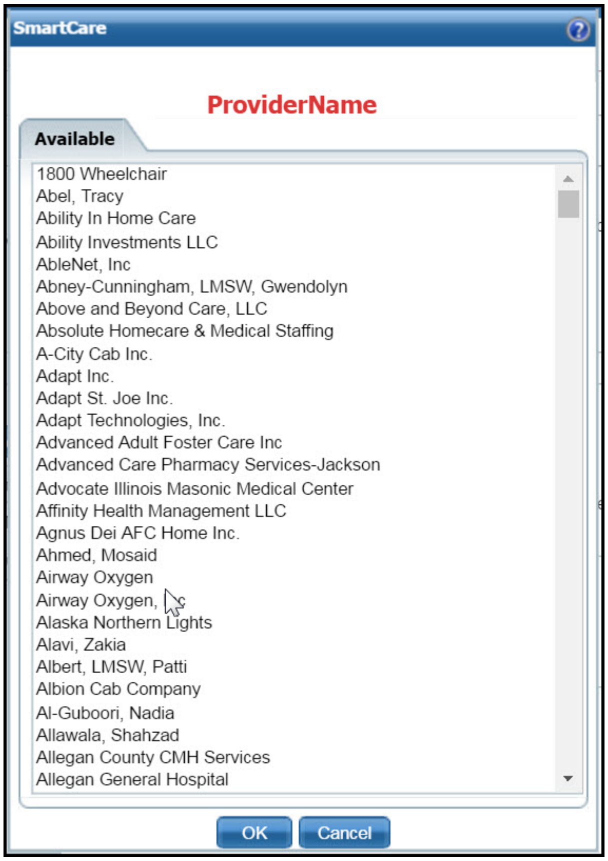
A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Site Information		
Name	Yes	Identifies the name of the site for this provider. You can enter up to 80 characters.
Start Date		Identifies the start date of coverage for this provider's clients.
Active	Yes	Identifies whether or not this provider is active in the system and the Care Management organization is processing claims.
Primary Site		Identifies whether or not this site is the primary site for the provider.
End date		If the provider is no longer active, identifies the date when the care management organization no longer processes claims.
Phone Numbers		
You can enter up to 4 phone numbers for this provider and choose the type of phone number you are entering.		
Drop down arrow 		Click the drop down arrow and choose a label to identify the phone number you are entering in the field. You can enter up to four phone numbers with different labels. Choices are: • Home • Business • Home 2 • Business 2 • Mobile • Mobile 2 • Fax • School • Other
Address		

Field	**Required?**	**Description**
You can enter up to three addresses for the provider. Use the drop down arrow to display each address that you add.		
Main drop down arrow		Use the drop down arrow to enter up to three addresses for the provider: Main, Office and Office 2. Select the address you want to enter. Then, click the *Details* button to enter the address for the provider.
Mailing		Select the *Mailing* check box to indicate which address, Main, Office or Office 2 is the mailing address for the provider.
Details button 		Use the Details button to display the *Address Details* window where you enter the up to 3 addresses for the provider. Tell me how...
Site Details		
Program		Identifies the program that the MCO bills for payment of the services provided to the client.
Type	Yes	Identifies the type of facility where the services are provided. Choices are: • Clinic • Crisis Residential • Drop-in Center • Group Home • Hospital
Print on Check as	Yes	Identifies the name printed on the checks in the "Pay to the order of" field when paying for services claimed. You can enter up to 90 characters in this field.
Capacity		Identifies the number of clients that can be admitted to the facility. You can enter up to 4 numbers in this field.
Current Openings		Identifies the number of open positions in this facility as of the date in the *As Of* field. You can enter up to 4 numbers in this field.
As Of		Use the calendar icon to select the date when the current openings number was posted.
Tax ID	Yes	Identifies the tax ID number of the facility or individual who is a provider submitting claims for payment. Select the *User for all sites* check box to indicate the information can be applied to all sites set up for this provider.
NPI	Yes	Identifies the National Provider Identifier number assigned by the Centers for Medicare and Medicaid Services (CMS). This field provides space for the 10-digit number assigned to the provider. Select the *User for all sites* check box to indicate the information can be applied to all sites set up for this provider.
Provider ID		Identifies the ID assigned to the provider as needed by the MCO. For example, this could be a provider ID from the previous system that is entered as part of data migration. You can enter unlimited characters in this field. Select the *User for all sites* check box to indicate the information can be applied to all sites set up for this provider.
Taxonomy Code		Identifies the code system used to categorize providers by specialty. Taxonomy codes are set up as part of Global Codes in the *Administration* banners. Select the *User for all sites* check box to indicate the information can be applied to all sites set up for this provider.
Place of Service		Identifies where the service is provided for this provider site. Select the *User for all sites* check box to indicate the information can be applied to all sites set up for this provider.
License #		Identifies the provider’s licenses number.
Weekend Hours		Identifies whether or not the site offers weekend hours.
Handicap Access		Identifies whether or not the site offers handicap access.
DD Population		Developmentally disabled population. Identifies whether the provider provides services to this population.
Adults		Identifies whether or not the provider offers services to the adult population.
1099		Identifies whether or not the provider is a 1099 provider.
Evening Hours		Identifies whether or not the provider offers evening hours.

Field	Required?	Description
SUD Population		Identifies whether or not the provider offers services to substance user disease population.
MI Population		Identifies whether or not the provider offers services to the mentally ill population.
Children		Identifies whether or not the provider offers services to children.
Site Contacts		Identifies the contact information entered for this site on the *Contact Persons* tab.
Site Comments		Identifies comments entered about the provider's sites. You can enter an unlimited number of characters in this field. When you are ready to save the information you enter on this tab, you can run spell check to find misspelled words in the free-form comment fields. Tell me how...
Sites		
Delete item icon		Use the **delete** icon to delete an associated provider from the list panel.
Radio button icon		Use the **radio button** icon to select a record to change information on the provider.
Site Name		Identifies the name assigned to the site.
Type		Identifies the type of site as selected when setting up the site.
Phone		Identifies the phone number for the site.
Phone Type		Identifies the type of phone number that was designated with the drop down arrow when entering the phone number.
Primary		Identifies whether or not the site was designated as the primary site.
Program		Identifies any program associated with the site. The program is used to bill services to a payer.

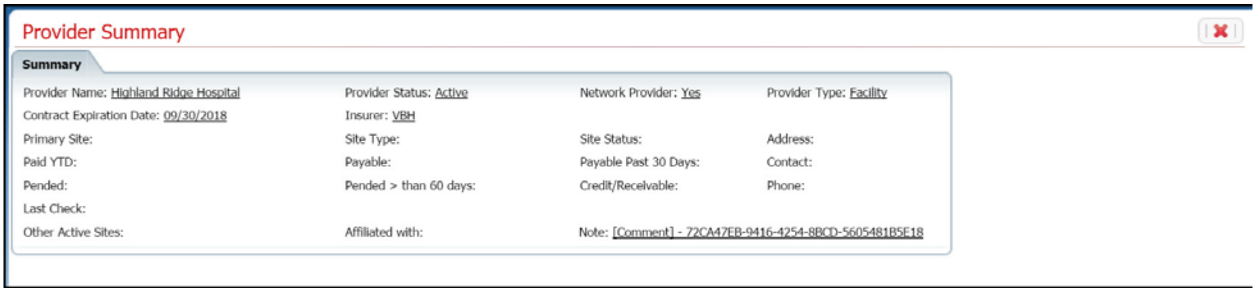
Provider Name Window Field Definitions



A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Available		
Names		List of providers set up in the system. For individuals, last name, first name. Select the provider you want to add as an associated provider on the *Provider Information* page *General* tab.

Provider Summary Page Field Definitions

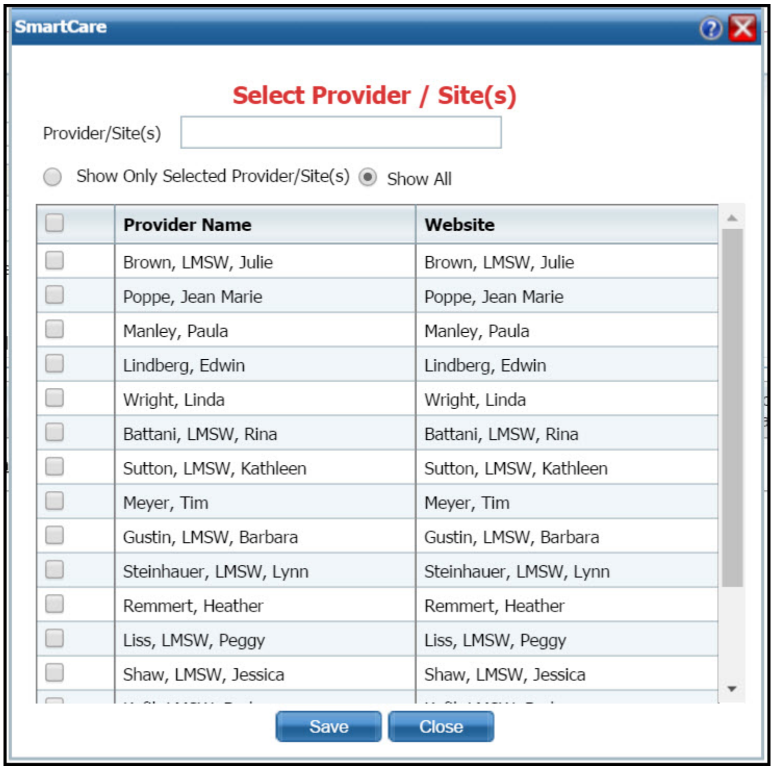


A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Summary		
Provider Name		Identifies the provider's name. Click the hyperlinked provider name to display the *Provider Information* page.
Provider Status		Identifies the current status of the provider in the system. Status choices are *Active* or *Inactive*. Click the hyperlinked word to display the *Provider Information* page where you can deselect the *Active* check box, if needed.
Network Provider		Identifies whether or not the provider is a network provider. A network provider is one that who is a member of the network. Click the hyperlinked word to display the *Provider Information* page.
Provider Type		Identifies whether the provider is a facility or an individual provider. Click the hyperlinked word to display the *Provider Information* page.
Contract Expiration Date		Identifies the date when the contract with the MCO expires. Click the hyperlinked date to open the *Contract Details* page where contract information is stored.
Insurer		Identifies the insurer who is responsible for paying for claims submitted by the provider for clients who are covered under an appropriate plan. Click the hyperlinked insurer name to display the *Provider Information* page where associated insurers are set up for the provider.
Primary Site		Identifies the site where the provider gives service to clients. If there are multiple sites, one of the sites is marked as primary. Click the hyperlinked site name to display the *Provider Information* page.
Site Type		Identifies the type of site that is the primary site. Click the hyperlinked site type name to display the *Provider Information* page. Select or change the site type on the *Sites* tab.
Site Status		Identifies the site where the provider gives service to clients. If there are multiple sites, one of the sites is marked as primary. Click the hyperlinked site status to display the *Provider Information* page. Select or change the *Site Status* on the *Sites* tab.
Address		Identifies the address entered for the primary site. Enter or change the information on the *Sites* tab.
Paid YTD		Identifies the total dollar amount paid to the provider for the current year-to-date. Click the hyperlinked dollar amount to display the *Checks* list page.
Payable		Identifies the amount owing to the provider that has been processed for payment, but not yet paid. Click the hyperlinked dollar amount to display the *Claim Lines (####)* list page.
Payable Past 30 Days		Identifies the dollar amount processed for payment in the past 30 days. Click the hyperlinked dollar amount to display the *Claim Lines (####)* list page.

Field	Required?	Description
Contact		Identifies the name of the contact person for the provider. Click the hyperlinked contact name to display the *Provider Information* page. The contact's name is displayed if the contact is marked as the primary contact.
Pended		Identifies the total dollar amount of pended claims.
Pended > than 60 days		Identifies the total dollar amount of pended claims that are older than 60 days.
Credit/Receivable		Identifies the total dollar amount of ???
Phone		Identifies the contact person's phone number for the provider. If the contact person is designated as the *Primary Contact*, the person's phone number is displayed. Click the hyperlinked phone number to display the *Provider Information* page.
Last Check		Identifies the dollar amount, date of the check and the check number for the last check paid to the provider. Click the hyperlinked check information to display the *Check Details* page.
Other Active Sites		Identifies other active sites set up for the provider. Click the hyperlinked site names to display the *Provider Information* page. Click the Sites tab to display the other active sites information.
Affiliated with		Identifies the providers who provide the services being billed for. Click the hyperlinked provider names to display the *Provider Information* page. The associated providers are displayed in the list panel beneath the *Associated Providers* button on the *General* tab.
Note		Identifies the *Provider Comment* added on the *Provider Information* page on the *General* tab.

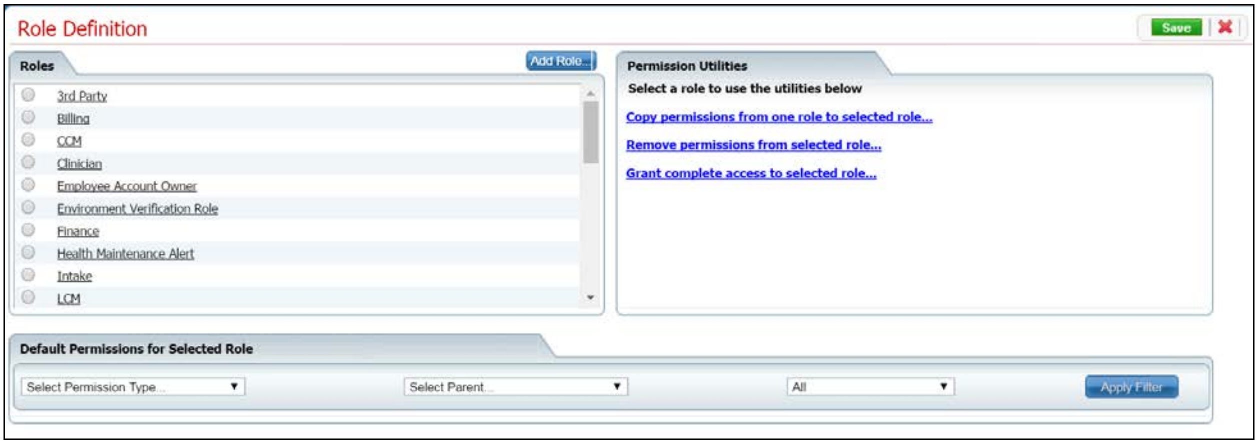
Selected Provider / Site(s) Window Field Definitions



A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Provider/Site(s)		What does this field do???
Show Only Selected Provider/Site(s)		After you have selected providers or sites, select this check box to display only the selected providers and sites.
Show All		Selected this option to display all providers and sites entered in the Care Management system.
List		
Check box		Select the check box by the name of the provider or site you are choosing.
Provider Name		Identifies the provider's name.
Website		Identifies the provider's web site entered when adding the provider to the system. True??? this appears to display the providers name again.

Role Definitions Page Field Definitions



A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Roles		
Roles		All roles defined in the system. A role defines a collection of permissions to make it easier to assign permission to each staff member who will use the system. Permissions are assigned to staff to give them permission to access list pages, screens and windows in SmartCare.
Add Role 		Click the **Add Role** button to add a new role to the system and assign permissions to that role.
Default Permissions for Selected Role		
Select Permission Type		Use this drop down list to display one permission type for the selected role.
Select Parent		Use this drop down list to select a specific parent type to view.
All		Use this drop down list to select to view all permissions, Granted permissions or Denied permissions for the selected role.
Permission Utilities		
Selected Role		This field appears if you have selected a role in the *Roles* section.
Copy permissions from one role to selected role		Click the **hyperlink** to copy permissions set up for one role to the Selected Role. When you click the Save button, all permission are copied from the role you select in the *Copy Permission from...* drop down list. However, If there are permission already set up on the *Selected Role*, these permission are not overridden.
Remove permissions from selected role		Use this option to remove all permissions from the selected role.
Grant complete access to the selected role		Use this option to grant all permissions in the system to the selected role.

Spell Check

Check for Spelling Errors in a Free-form Comment Field

When you have entered text in free-form comment fields on a page or window, if the spell check icon is present in the task bar, you can check for spelling errors in the comment fields.

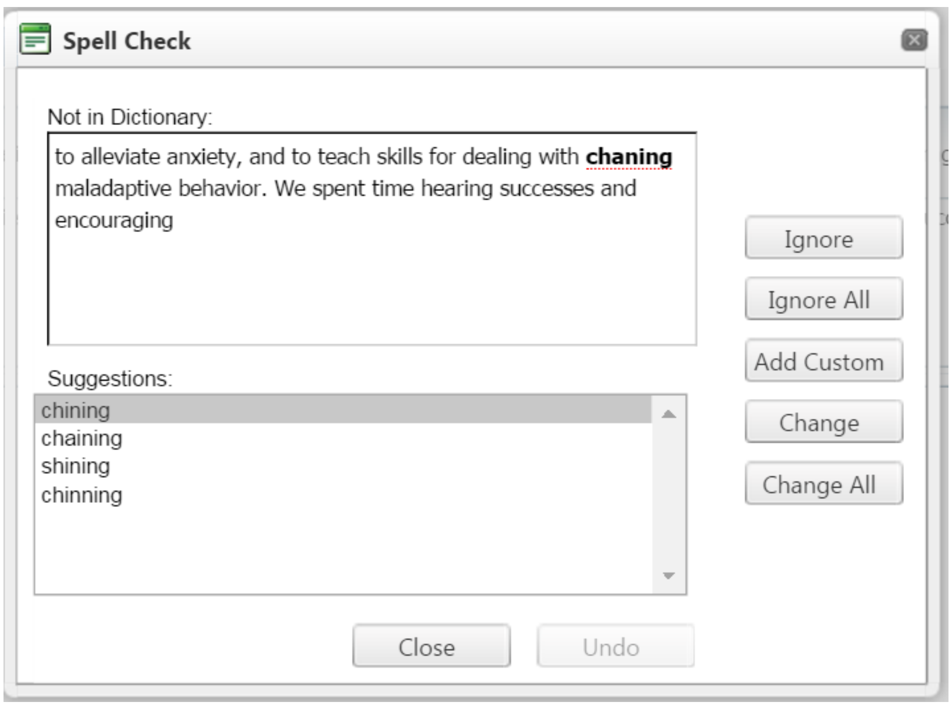
1. Complete all comment fields on a page or window.

2. Click the **spell check**  icon in the task bar.

   Spell Check searches all comment fields.

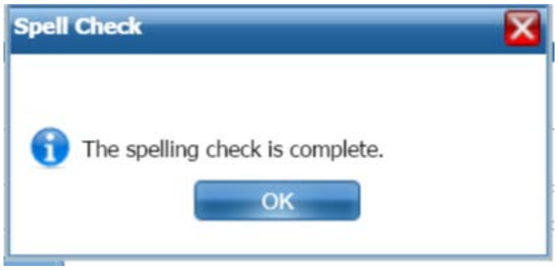
   If a misspelled word is found, the *Spell Check* window is displayed.

3. Notice that the misspelled word is bolded and underlined with a red dotted line in the *Not in Dictionary* panel. Suggestions for correct spellings are listed in the *Suggestions* panel. View [field definitions.]



-or-

If the *Spell check is complete* window is displayed, the spell check is complete.

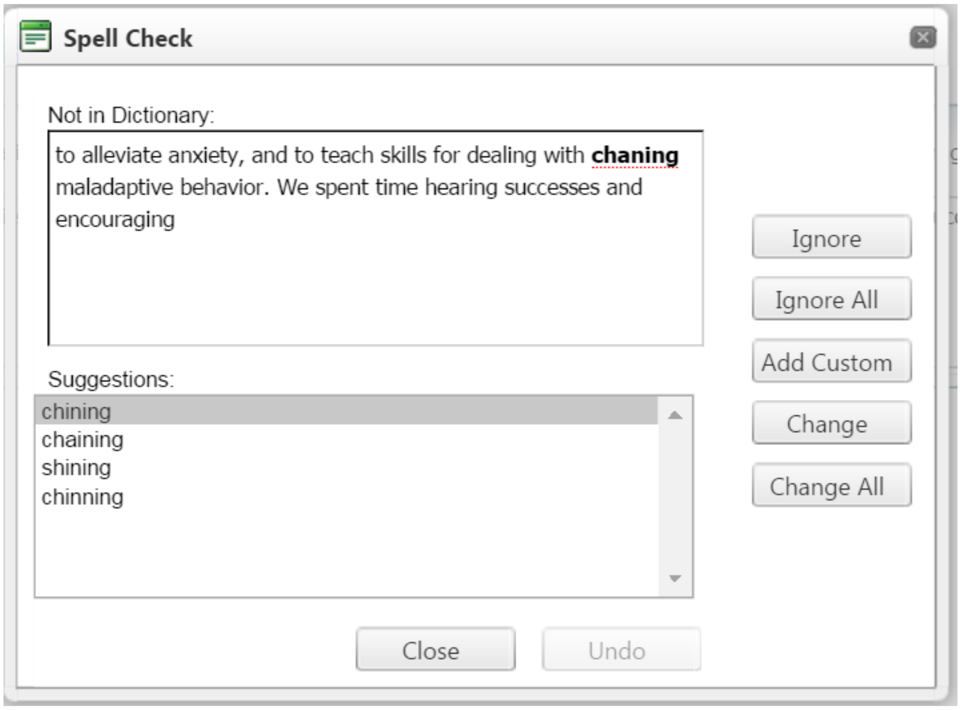


4. Click the **Yes** button in the *Spell check is complete* window.

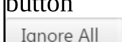
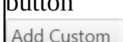
   The page you started the *Spell Check* from is displayed.

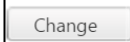
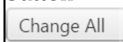
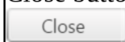
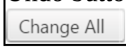
Why can't I access these screens?

Spell Check Window Field Definitions



A **Yes** in the *Required?* column below identifies those fields that are required in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Required?	Description
Not in Dictionary		
<text>		Displays the text that contains a misspelled word(s). The first misspelled word is bolded and underlined with a red dotted line.
Suggestions		
Word list		Words suggested by *Spell Check* to replace and correct the misspelled word. If no suggestions are listed, place your cursor in the misspelled word in the *Not in Dictionary* panel and correct the spelling. Click the Change or Change All button to correct the spelling.
Buttons		
Ignore button 		Click the **Ignore** button to accept the spelling as it is shown in the comment field. Spell check displays and highlights the next misspelled word, if there are any.
Ignore All button 		Click the **Ignore All** button to accept all incidents of the currently highlighted misspelled words as shown in the comment field.
Add Custom button 		Click the **Add Custom** button to add the word to the system dictionary. If you add the word with its shown spelling, it will not no longer be shown as a misspelled word. Use this function for words, such as brand name words, or commonly used abbreviations in your facility. By adding these custom words, they will no longer be shown as misspelled. When you click the *Add Custom* button, a message window asks if you want to add the word to the dictionary. Click Yes to save the word.

Field	Required?	Description
Change button 		In the *Suggestions* panel, highlight the correctly spelled word and click the **Change** button. The next misspelled word is displayed and highlighted in the *Not in Dictionary* panel.
Change All button 		In the *Suggestions* panel, highlight the correctly spelled word and click the **Change All** button to correct all instances of this same misspelled word. The next misspelled word is displayed and highlighted in the *Not in Dictionary* panel.
Close button 		When you have finished correcting misspelled words, click the **Close** button. The *Spell Check Complete* window is displayed if all misspelled words have been corrected or ignored.
Undo button 		Click the **Undo** button to undo the last action that you took in the *Spell Check* window.

Miscellaneous

Filter a List Page

A list page displays a list of all the content categories on the page. Using the filters you can narrow the list of information that you view. The filters vary depending on the content of the list.

1. Follow a path from a banner selection to display a list page.

   The list page is displayed

2. In the drop-down lists in the *Filter* box, select the items in each drop-down list to limit what is displayed on the page.

3. Click the **Apply Filter** button.

   Note: The filter that you apply to that page remains until you change the filters and click the *Apply Filter* button again.

4. When the list is displayed, click on a **hyperlinked item** to view the detail page for that item.

Why Can't I Access a Screen?

You can only access screens that your user sign on has been granted access to. This property is referred to as *Permissions*. Use the table below to find the screen you need access to and determine the Permissions that are needed. To solve this, you need to discuss this issue with your system administrator to have the Permissions changed.

To access *Permissions:*

1. Follow this path: **Administration ▸ User/Role Setup ▸ Role Definition.**

   The *Role Definition* page is displayed. View field definitions.

From the *Permissions* page, you can:

Determine Which Permissions Are Needed for the Care Management Pages

If you can't access this screen...	You Need Permission Type	Parent	Permission Item
Care Management	Application Dropdowns		Clients
	Application Dropdowns		Create Service/Notes
	Application Dropdowns		Providers
	Banners	Administration	Adjudication Rules Setup
	Banners	Administration	Billing Codes
	Banners	Administration	Care Management - Admin (Care Management)
	Banners	Administration	Insurers
	Banners	Administration	Staff Database Access
	ClientAccess Rules		All clients
	Document Codes (Edit		Subcontractor Network
	Screen (New Mode)	837 File Details	Reprocess
	Screen (New Mode)	A/R by Plan	Export
	Screen (New Mode)	Auth Codes	Export
	Screen (New Mode)	Auth Codes	New
	Screen (New Mode)	Auth Documents	Export
	Screen (New Mode)	Authorization Codes	Export
	Screen (New Mode)	Claim Entry - Institutional	Delete
	Screen (New Mode)	Claim Entry - Institutional	Delete
	Screen (New Mode)	Claim Entry - Institutional	New
	Screen (New Mode)	Claim Entry - Institutional	New
	Screen (New Mode)	Claim Entry - Institutional	Update
	Screen (New Mode)	Claim Entry - Institutional	Update
	Screen (New Mode)	Claim Entry - Professional	Delete
	Screen (New Mode)	Claim Entry - Professional	Delete
	Screen (New Mode)	Claim Entry - Professional	New
	Screen (New Mode)	Claim Entry - Professional	New
	Screen (New Mode)	Claim Entry - Professional	Update
	Screen (New Mode)	Claim Entry - Professional	Update

If you can’t access this screen...	You Need Permission Type	Parent	Permission Item
	Screen (New Mode)	Claim Lines	Adjudicate
	Screen (New Mode)	Claim Lines	Denial Letter
	Screen (New Mode)	CM Authorization Details	Delete
	Screen (New Mode)	CM Authorization Details	Delete
	Screen (New Mode)	CM Authorization Details	New
	Screen (New Mode)	CM Authorization Details	New
	Screen (New Mode)	CM Authorization Details	Save
	Screen (New Mode)	CM Authorization Details	Save
	Screen (New Mode)	CM Authorization	Export
	Screen (New Mode)	CM Authorization	Export
	Screen (New Mode)	CM Authorization	New
	Screen (New Mode)	CM Authorization	New
	Screen (New Mode)	Contract Details	Delete
	Screen (New Mode)	Contract Details	New
	Screen (New Mode)	Contract Details	Update
	Screen (New Mode)	DSM 5 Diagnosis	Delete
	Screen (New Mode)	DSM 5 Diagnosis	Move Document
	Screen (New Mode)	DSM 5 Diagnosis	New
	Screen (New Mode)	DSM 5 Diagnosis	Print
	Screen (New Mode)	DSM 5 Diagnosis	Save
	Screen (New Mode)	DSM 5 Diagnosis	Sign
	Screen (New Mode)	My Caseload	Export
	Screen (New Mode)	My Documents	Export
	Screen (New Mode)	My Preferences	New
	Screen (New Mode)	My Preferences	Save
	Screen (New Mode)	My Services	Export
	Screen (New Mode)	Treatment Plan Addendum	Print
	Screen (New Mode)	Treatment Plan Annual	Print
	Screen (New Mode)	Claim Lines	Deny
	Screen (New Mode)	Claim Lines	Do Not Adjudicate
	Screen (New Mode)	Claim Lines	Pay
	Screen (New Mode)	Claim Lines	ReAdjudicate
	Screen (Update Mode)	837 File Details	Reprocess
	Screen (Update Mode)	A/R by Plan	Export
	Screen (Update Mode)	Auth Codes	Export
	Screen (Update Mode)	Auth Codes	New
	Screen (Update Mode)	Auth Documents	Export
	Screen (Update Mode)	Authorization Code Detail	Delete
	Screen (Update Mode)	Authorization Code Detail	New
	Screen (Update Mode)	Authorization Code Detail	Save
	Screen (Update Mode)	Authorization Codes	Export
	Screen (Update Mode)	Authorization Codes	New
	Screen (Update Mode)	Claim Entry - Institutional	Delete
	Screen (Update Mode)	Claim Entry - Institutional	Delete
	Screen (Update Mode)	Claim Entry - Institutional	New
	Screen (Update Mode)	Claim Entry - Institutional	New
	Screen (Update Mode)	Claim Entry - Institutional	Update

If you can't access this screen...	You Need Permission Type	Parent	Permission Item
	Screen (Update Mode)	Claim Entry - Institutional	Update
	Screen (Update Mode)	Claim Entry - Professional	Delete
	Screen (Update Mode)	Claim Entry - Professional	Delete
	Screen (Update Mode)	Claim Entry - Professional	New
	Screen (Update Mode)	Claim Entry - Professional	New
	Screen (Update Mode)	Claim Entry - Professional	Update
	Screen (Update Mode)	Claim Entry - Professional	Update
	Screen (Update Mode)	Claim Lines Detail	View Claim Form
	Screen (Update Mode)	Claim Lines	Adjudicate
	Screen (Update Mode)	Claim Lines	Denial Letter
	Screen (Update Mode)	Claim Lines	Deny
	Screen (Update Mode)	Claim Lines	Do Not Adjudicate
	Screen (Update Mode)	Claim Lines	Pay
	Screen (Update Mode)	Claim Lines	ReAdjudicate
	Screen (Update Mode)	Claim Lines	Revert
	Screen (Update Mode)	Client Account	Button_GenerateClaims
	Screen (Update Mode)	Client Account	Button_GenerateStatements
	Screen (Update Mode)	Client Account	Button_PostPayment
	Screen (Update Mode)	Client Account	Button_ViewPastStatemens
	Screen (Update Mode)	CM Authorization Details	Delete
	Screen (Update Mode)	CM Authorization Details	Delete
	Screen (Update Mode)	CM Authorization Details	New
	Screen (Update Mode)	CM Authorization Details	New
	Screen (Update Mode)	CM Authorization Details	Save
	Screen (Update Mode)	CM Authorization Details	Save
	Screen (Update Mode)	CM Authorization	Export
	Screen (Update Mode)	CM Authorization	Export
	Screen (Update Mode)	CM Authorization	New
	Screen (Update Mode)	CM Authorization	New
	Screen (Update Mode)	DSM 5 Diagnosis	New
	Screen (Update Mode)	DSM 5 Diagnosis	Print
	Screen (Update Mode)	DSM 5 Diagnosis	Save
	Screen (Update Mode)	DSM 5 Diagnosis	Sign
	Screen (Update Mode)	My Caseload	Export
	Screen (Update Mode)	My Documents	Export
	Screen (Update Mode)	My Preferences	New
	Screen (Update Mode)	My Preferences	Save
	Screen (Update Mode)	My Services	Export
	Screen (Update Mode)	Treatment Plan Addendum	Print
	Screen (Update Mode)	Treatment Plan Annual	Print
	Screens	Administration	Add/Modify Payer
	Screens	Administration	Adjudication Rule Detail

If you can't access this screen...	You Need Permission Type	Parent	Permission Item
	Screens	Administration	Adjudication Rules Insurer Pop up
	Screens	Administration	Advanced Billing Code
	Screens	Administration	Advanced Claim Formats for Plan
	Screens	Administration	Advanced Provider ID Definition for Plan
	Screens	Administration	Available Codes
	Screens	Administration	Available Plans
	Screens	Administration	Banner Detail
	Screens	Administration	Procedure Code Details
	Screens	Administration	Procedure Code Details
	Screens	Administration	Procedure Code Details
	Screens	Administration	Quick Actions Popup
	Screens	Client	Authorization Details
	Screens	Client	Authorization Details
	Screens	Client	Authorization Reasons
	Screens	Client	Claim Entry - Institutional
	Screens	Client	Claim Entry - Institutional
	Screens	Client	Claim Entry - Professional
	Screens	Client	Claim Entry - Professional
	Screens	Client	Client Authorizations
	Screens	Client	Client Information General
	Screens	Client	CM Authorization Details
	Screens	Client	CM Client Authorization Details
	Screens	Client	CM Client Search
	Screens	Client	Provider Search
	Screens	Client	Provider Search
	Screens	Client	Providers
	Screens	My Office	837 Batch Details
	Screens	My Office	837 Claim Line Details
	Screens	My Office	837 File Details
	Screens	My Office	837 File Import
	Screens	My Office	837 File Text
	Screens	My Office	837 Import Claim Lines
	Screens	My Office	Appeal Authorizations Detail Popup
	Screens	My Office	Appeal Details
	Screens	My Office	Appeal Letter Detail Popup
	Screens	My Office	Claim Entry - Institutional
	Screens	My Office	Claim Entry - Institutional
	Screens	My Office	Claim Entry - Professional
	Screens	My Office	Claim Entry - Professional
	Screens	My Office	Client Payment
	Screens	My Office	CM Checks Validate Password
	Screens	My Office	Consumer Appeal
	Screens	My Office	Provider Search
	Screens	My Office	Provider Staff Details
	Screens	Provider	Associated Providers

If you can't access this screen...	You Need Permission Type	Parent	Permission Item
	Screens	Provider	Contact Person Information
	Screens	Provider	Contract Details
	Screens	Provider	Contract Rates
	Screens	Provider	Contract Rules
	Screens	Provider	Contracts Rates
	Screens	Provider	Credentialing Billing Codes
	Screens	Provider	Credentialing Details
	Screens	Provider	New Provider
	Screens	Provider	Provider Information General
	Screens	Provider	Site Information
	Screens	Provider	Site Review Detail
	Screens	Utilization Management	Auth Codes
	Screens	Utilization Management	Authorization Code Details
	Screens	Utilization Management.	Authorization Details
	Screens	Utilization Management	Authorization Documents
	Staff List		Clinician
	Staff List		Prescriber
	Staff List		Program Manager
	Widgets		Care Management New Alerts/Messages
	Widgets		New Alerts/Messages
	Widgets		Provider Authorizations
	Widgets		Provider Claims
	Widgets		Provider Contracts
	Widgets		Providers