

**PAYMENT ERROR RATE MEASUREMENT - ELIGIBILITY
USER GUIDE**

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About Perm Eligibility:

In order to reduce the number of erroneous payments to providers for Medicaid and SCHIP services, the federal government (CMS) has mandated the Payment Error Rate Measurement (PERM) for claims and eligibility. Every month small random sample will be taken from eligibility cases over a one year period. Those samples will then be meticulously audited and the results from the audit will be downloaded to excel and reported back to the CMS via PERT web system.

Business process events:

1. Various SAS generated eligibility excel files will be given to the Perm Users every month.
2. Excel files have to be formatted and converted to .CSV file before loading into Perm Eligibility System.
3. User will store the file on Server in order to load the data into temporary table.
4. If there are several excel files to be loaded, before storing another file on to server, user needs to run the Load Perm Data process.
Ex: if they format FAMI NEGATIVE Sample, they have to store that file as perm_elig.csv on the server and run the load process by logging into Perm Apex system.
5. Every month, sample data will be sent to CMS before they will be reviewed.
6. Once the data is in PERM Eligibility system various analyst will perform the review process.
7. Users can search for PERM case in several ways and review the perm case.
8. Every 150 day negative and Positive cases will be downloaded to excel. Data will be will be copied to CMS created PERT excel which will be uploaded to their system.

The User Interface and Login process

User will login into Perm Eligibility system via the web browser.

TEST Link:

<http://dmasinfra.ad.dmas.virginia.gov:7778/pls/apex/f?p=4550:1:439148844956085>

Perm Eligibility User Guide

User will enter their Windows Username and password.

User Name

Password

Once the user logs into PERM ELIGIBILITY system they will see the main menu.

Main Menu

Perm Manager will see the below menu option

PERM ELIGIBILITY MENU

| |

Other Perm Users will see this menu option.

PERM ELIGIBILITY MENU

|

Admin Menu

| |

- Update Case Status
- Add/Edit CMS Codes
- Perm Eligibility Users
- Update DMAS Error Code Desc
- Load Perm Data
- Add/Edit Perm Common Desc Type

Reports Menu

|

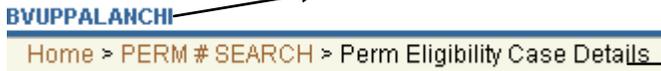
- Case Status Report
- Closed Cases
- Open Case(s)
- Reviews Assigned To
- Sample Month - Due Dates
- Monthly Sample Selection List
- Reviewer Case Count
- 105,125 Day Report
- 150 Day -Active Case Findings To CMS
- 150 Day - Negative Case Findings To CMS
- Correspondence Tracking
- CMS-DMAS CROSS REFERENCE

Search Perm Case Menu

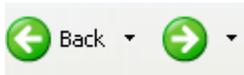


Bread Crumb

Bread crumb is the path where the current screen can follow or go back. Home always goes the main menu. User Logged in



Bread Crumb Path



Back and Previous options.

Download

Download Data into Excel



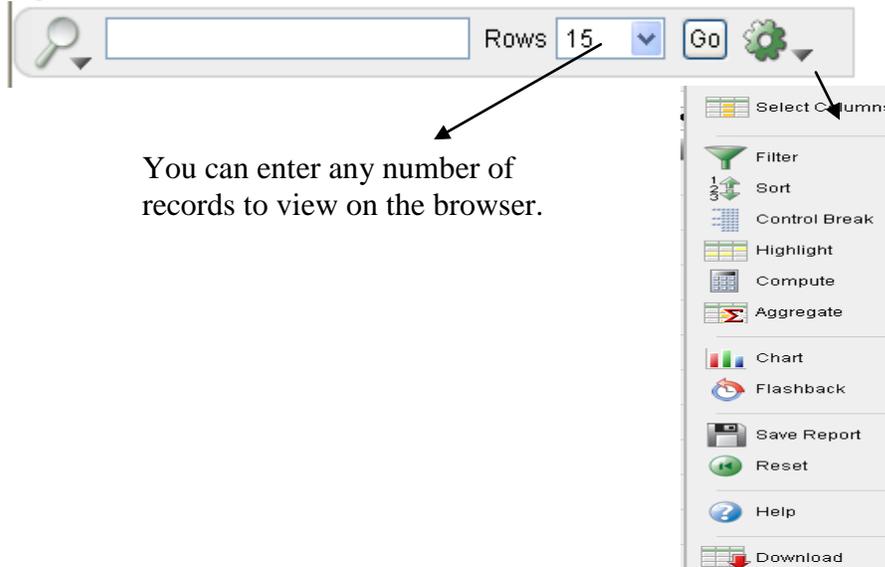
Hyperlink Text: User can click on the object to go to the next screen

Interactive Report:



For any report you see below figure B1 it means an interactive report where you can perform more criteria to get the report results. Some of the common options you use are Download the file, Filter, and sort or compute the report etc.

Figure B1.



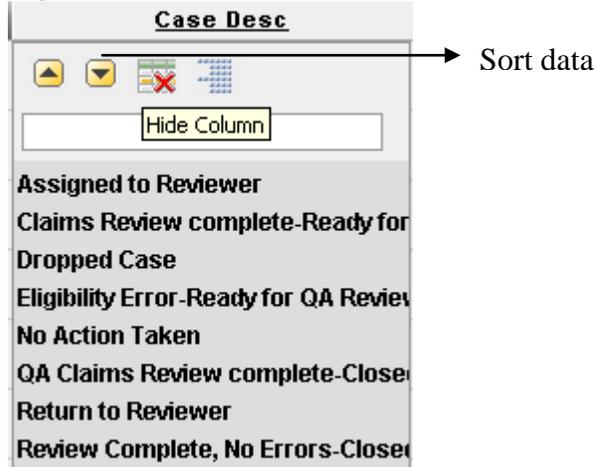
You can enter any number of records to view on the browser.

You can also save the filtered report. Figure B2 shows the other filtered reports within the main report. Saved reports are saved for the user logged in.

Figure B2.



Figure B3.



 **Reset** If user wants to remove the filters, highlights, come back to the original report format, click the Reset in the interactive menu option.

 **Calendar**

 **Edit the record.**

 **Lov (List of Values)**

 If the user doesn't want to save the data or want to go back to the previous screen they can click the cancel button.

Perm Case Detailed Tab menu

For every perm case user will see the below tab options.



What the “%” Sign Does (wild Card)

The “%” sign stands in place of *one or more* alphanumeric characters so that you can conveniently type a portion of the value you are looking for instead typing the whole thing. This is useful if you are searching by Medicaid Number or SSN or Name, since it

Perm Eligibility User Guide

is easier to type the first two or three digits than to type the whole number. Most of the time you will type some characters *in front of* the “%” sign.

Search Perm Case Screen	SSN	A few digits of the SSN will be entered followed by %. See the example in Figures A1 below.
-------------------------	-----	---

Perm Eligibility Access Levels:

There are 3 kinds of user groups for perm eligibility system.

Perm Manager: Is a super user. Can perform all the admin processes as well regular review process.

Perm Reviewer: Cannot perform the admin work. Can perform the Reviewer functions but cannot edit/add any data to QA review.

Perm QA: Cannot perform the admin work. Can do the QA reviews but cannot edit/add any reviewer work.

Search Perm Case

Users can search a perm case in several ways.

- 1) They can search by using the perm case search menu
 - a) Search Case by Recipient, Perm No
 - b) Search By open and closed cases by Program
- 2) Case Status report. Click Reports menu, then choose case status report. This is another shortcut way to search for Perm Case.

Search by Recipient Details or Perm Case.

User can enter Recipient number or last name or SSN or perm number and search for specific perm case. Below figure A1 shows the search based on SSN. Enter your search criteria and click the View Case(s) button. You will see the results of the search criteria. Below results gets the data of PERM cases whose SSN starts with “224”

Figure A1

The screenshot shows the 'PERM CASE SEARCH' form with the following fields and annotations:

- Perm #**: Empty text box.
- Recipient Last Name**: Empty text box with an annotation 'List of Last Names' and an arrow pointing to a dropdown menu labeled 'LIST OF LAST NAMES'.
- Recipient #**: Empty text box.
- SSN**: Text box containing '224%' with an annotation 'Click' and an arrow pointing to a red 'View Case(s)' button.

Below the search form is the 'PERM CASE SEARCH RESULTS' table:

Perm No	Case Status Id	Case Status	Case Status Date	Recipient #	Name	Ssn	Stratum	Program	Review #
VA09S05101	4	Eligibility Error-Ready for QA Review	12/29/2008				1-Application	SCHIP	200805
VA09S04101	3	Review Complete, No Errors-Closed	12/24/2008				1-Application	SCHIP	200804
VA09M10310	1	No Action Taken	12/22/2008				3- All Other Cases	Medicaid	200810
VA09M10316	1	No Action Taken	12/22/2008				3- All Other Cases	Medicaid	200810
VA09S04111	6	Return to Reviewer	12/12/2008				1-Application	SCHIP	200804

NOTE: Recipient information has been removed (above) for HIPAA compliance.

Perm Eligibility User Guide

Perm no has the hyperlink. [VA09S04101](#) . You can click the PERM # in order to see the detail perm case review tracking figure A4

Search by Open, Closed Cases by Program

User can select view the report results based on Program type using the option buttons.

- Medicaid
Program Schip
 Both

Results will be shown as seen in **Figure A2**. User can click the sample month to view the cases for that month for that program.

SAMPLE_MONTH ▲	PROGRAM	CLOSED CASES	OPEN CASES
200801	Medicaid	0	2
200802	Medicaid	0	1
200806	Medicaid	0	2
200807	Medicaid	0	2
200808	Medicaid	1	0
200810	Medicaid	0	28
			1 - 6

Click the sample month to see the perm cases for that month

Figure A3

Home > Open Closed Cases By Program, Sample Month

Medicaid
Program Schip
 Both

SAMPLE_MONTH ▲	PROGRAM	CLOSED CASES	OPEN CASES
200801	Medicaid	0	2
200802	Medicaid	0	1
200806	Medicaid	0	2
200807	Medicaid	0	2
200808	Medicaid	1	0
200810	Medicaid	0	28
			1 - 6

SAMPLE_MONTH ▲	PROGRAM	PERM_NO	RECIP_NO	Case Status	Name	Strata	Case Type	CASE_STATUS_DT
200801	Medicaid	VA09M01103		No Action Taken		1-Application	Positive	12/16/2008
200801	Medicaid	VA09M01402		No Action Taken		4-Denial / Terminated	Negative	12/16/2008
								1 - 2

Perm no [VA09M01402](#) has the hyperlink. You can click the PERM # in order to see the detail perm case review tracking figure A4

Perm Case Details:

Figure A4: PERM CASE DETAIL

Home > PERM # SEARCH > Perm Eligibility Case Details

PERM CASE TRACK DETAILS

Perm No **VA09M01402**

Program Medicaid

Recp Name

Recip #

SSN

DOB

Fips 139

Case Last Name

Denial Cancel Date

Drop Reason

Case Status Date 01/07/2009

Created By bvuppalanchi

Updated By bvuppalanchi

Strata 4-Denial / Terminated

Case Type **Negative**

Sample Month **200801**

DSS Region NORTHERN 1

Case Source SAS

Final Pay Amount

Case First Name

Drop Date

Case Activity Status Assigned to Reviewer

Created Date 12/16/2008

Updated Date 01/07/2009

Cancel Save

Case Status History

Status History Series	Perm #	Case Status Desc	Status ID	Status Date	Changed By
139	VA09M01402	Assigned to Reviewer	2	01/07/2009	bvuppalanchi

1 - 1

Case Status History

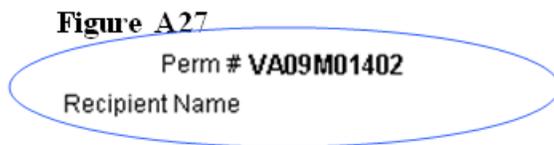
All the case detail screens show the case status history report.

Only time you want to work on this screen is when you want to drop the case. You have to enter drop reason and date when the Status is dropped.

A new perm case is 1st assigned to a reviewer. Users who got the manager capability can assign the reviewer. Other regular users don't see the button "Assign Reviewer Case".

Note: For all the perm case detail perm # and Name will be displayed.

Ex: Figure A27



NOTE: Recipient Name removed for

HIPAA compliance:

Assign Case To Reviewer:

Figure A5

Home > PERM # SEARCH > Perm Eligibility Case Details > Reviewer Case → Bread Crumb

Perm # **VA09M01402**
Recipient Name

REVIEWER CASE

no data found

[Assign Reviewer Case](#)

User will click the “Assign Reviewer Case” button to assign the reviewer. See Figure A6.

Figure A6

Assign Case To Reviewer

Perm No

Rev Assigned By

Rev Assigned To

Rev Assigned Dt  → Calendar

Created Dt

Created By

[Cancel](#) [Add](#)

Enter the details and click the Add button to assign the case. You will see the below Figure A7.

Figure A7.

Home > PERM # SEARCH > Perm Eligibility Case Details > Reviewer Case

Perm # **VA09M01402**
Recipient Name **HARMON A TROY**

REVIEWER CASE

Edit	Review Series	Assigned By	Assigned To	Assigned Dt	CMS Code	DMASError Code	Completed Date	Reviewer Comment	Created Date	Created By
	190	Lothine Pettaway	Carmel Jones	01/08/2009					01/07/2009	bvuppalanchi

[Assign Case To Reviewer](#) → Edit the reviewer case

ID: **VA09M01402**

Reviewer can edit the reviewer case by clicking Edit button.

Working in Reviewer Section

Figure A8
Reviewer Case

Recipient Name
Perm No VA09M01402 **Review Series** 190
Review Assigned By Lothine Pettaway **Review Assigned To** Carmel Jones
Rev Assigned Date 01/08/2009
Case Type **Negative**

CMS Review Finding

Primary Dmas Error Code

Rev Completed Date

Reviewer Comment

Update Case Status

Perm No VA09M01402
Case Status Id

Case Status Dt

Created By bvuppalanchi **Created Dt** 01/07/2009

Updated By **Updated Dt**

Case Status Report

Status History Series	Perm #	Case Status Desc	Status ID	Status Date	Changed By
139	VA09M01402	Assigned to Reviewer	2	01/07/2009	bvuppalanchi

1 - 1

Reviewer can select the CMS findings. Based on the CMS findings value DMAS error code will be populated.

Reviewer need to enter the completed date and can change the Case status. Reviewer got to click the Save Reviewer data button to save the changes.

QA analyst cannot save the reviewer section data elements.

Reviewer can add more secondary DMAS Error codes.

Adding Secondary /Additional DMAS Error codes:

Figure A9

Reviewer Case

Recipient Name
Perm No VA09M01402 **Review Series** 190
Review Assigned By Lothine Pettaway **Review Assigned To** Carmel Jones
Rev Assigned Date 01/08/2009
Case Type Negative

CMS Review Finding U

Primary Dmas Error Code 1243-Undue hardship not offered

Rev Completed Date 01/04/2009

Reviewer Comment asdasd

Add Secondary Dmas Error Codes

Add Secondary Dmas Errors

Add Secondary DMAS errors button doesn't show if no DMAS error code or CMS finding is saved.

To add the secondary codes, click the "Add Secondary DMAS errors" button.

Select from the list of DMAS error codes. In the above Figure A9 reviewer selected CMS findings as U. So, in the secondary error codes screen reviewer will see the additional DMAS error codes for that CMS finding.

You can save by clicking the Add Secondary Codes button. You can save as many additional error codes.

Selected DMAS error codes will be shown in the same screen. See Figure A10.

DMAS error code drop down list doesn't show the saved error code to avoid duplicate saving of same error code. See Figure A11

Figure A10

Case Items

Perm # VA09M01402
 Review Series 190
 Reviewed By R

Add/Edit Secondary DMAS Error Codes

* DMAS Error Code [Dropdown Menu]

Back Reviewer Case Add Secondary Codes

DMAS Secondary Error Codes

PERM #	Reviewer/QA Series	Reviewed By	Error Code	Created Date	Created By
VA09M01402	190	R	1215	01/08/2009	bvuppalanchi
VA09M01402	190	R	1217	01/08/2009	bvuppalanchi
VA09M01402	190	R	1225	01/08/2009	bvuppalanchi
VA09M01402	190	R	1228	01/08/2009	bvuppalanchi

1 - 4

Figure A11

* DMAS Error Code [Dropdown Menu]

- 1216 - Income verifications missing from file
- 1218 - For Renewals Only: The Case File information does not include verification of citizenship and identity.
- 1219 - For Applications Only: The Case File information does not include verification of citizenship and identity.
- 1221 - Other (Must be explained and documented).
- 1227 - Verification of pregnancy not in record
- 1229 - Enrollee is a member of a family eligible for health benefits coverage under the State Employee Health Insurance Plan
- 1230 - Enrollee currently has creditable health insurance
- 1231 - Enrollee no longer pregnant
- 1232 - Enrollee did not provide documentation of pregnancy
- 1235 - Enrollee did not report income increase to 200% FPL - enrollee ineligible
- 1239 - Transfer of assets - affects eligibility for LTC payments
- 1241 - Resource Assessment required, but not completed
- 1242 - Enrollee did not begin LTC within 30 days of the Notice of Action on Medicaid. Applicable to 300% group only
- 1243 - Undue hardship not offered
- 1244 - POI incorrectly calculated
- 1245 - DMAS 96 or Level of Care form required. Not in case record
- 1246 - DMAS 122 not in case record
- 1247 - Notice of Obligation not in case record

Process of adding the additional Secondary codes are same for QA and Reviewer Section. For QA section QA will enter the additional codes using the QA review Section.

Once the secondary DMAS error codes have been added, you can view the secondary codes list by clicking the highlighted Primary DMAS Error Code as seen in Figure A12. **A12.**

Figure A12

Perm Eligibility User Guide

CMS Review Finding U

Primary Dmas Error Code 1243-Undue hardship not offered

Rev Completed Date 01/04/2009

Reviewer Comment
asdasd

Report will be seen as seen in Figure A13

Figure A13

DMAS Secondary Error Codes

PERM_NO ▲	REVIEW_SERIES	DMAS_ERR_CODE	REVIEWER_TYPE
VA09M01402	190	1215	R
VA09M01402	190	1217	R
VA09M01402	190	1225	R
VA09M01402	190	1228	R
			1 - 4

➤Note: the above report will reflect the codes added by QA analyst also. Analyst can use the browser back button to go back to the previous screen.

QA Review Process

Figure A14

REVIEWER CASE

Edit	Review Series ▼	Assigned By	Assigned To	Assigned Dt	CMS Code	DMASError Code	Completed Date	Reviewer Comment	Created Date	Created By
<input type="button" value="edit"/>	190	Lothine Pettaway	Carmel Jones	01/08/2009	U	1243	01/04/2009	asdasd	01/07/2009	bwuppalanchi

If Reviewer reviews the perm case and selects the CMS code, QA review section will automatically display the initial review findings.

Figure A15

Perm # VA09M01402
Recipient Name HARMON A TROY

QA REVIEW DETAILS

Edit	Review Series ▼	QA CMS Code	QA DMAS Code	QA Review Decision	QA Comments	QA Reviewed By	QA Completed Date	Created By	Created Date
<input type="button" value="edit"/>	190	U	1243					bwuppalanchi	01/08/2009

In the figure A14 Reviewer CMS findings is U. Initial QA review will be U. It is up to the case whether QA analyst will accept the same CMS finding or enter a different CMS finding.

Perm Eligibility User Guide

If the QA analyst wants to change the CMS finding, analyst needs to click on the edit button. . In the below figure A16 the QA analyst disagrees and enters a different CMS findings. Changes the case status to Return to Reviewer.

Figure A16

QA REVIEW CASE

Review Series 190

QA CMS FINDING

QA Primary DMAS Error Code

QA Review Decision

QA Comments

QA Reviewed By

QA Completed Date

Add Secondary Dmas Error Codes

Update Case Status

Perm No VA09M01402

Case Status Id

Case Status Dt

Created By bvuppalanchi **Created Dt** 01/08/2009

Updated By bvuppalanchi **Updated Dt** 01/08/2009

Case Status History

Status History Series	Perm #	Case Status Desc	Status ID	Status Date	Changed By
141	VA09M01402	Return to Reviewer	6	01/08/2009	bvuppalanchi
140	VA09M01402	Eligibility Error-Ready for QA Review	4	01/08/2009	bvuppalanchi

QA analyst can add the Secondary DMAS Error codes if needed. See Figure A17

Figure A17
Add/Edit Secondary DMAS Error Codes

* DMAS Error Code

[Add Secondary Codes](#) [Back To QA Case](#)

DMAS Secondary Error Codes

PERM #	Reviewer/QA Series	Reviewed By	Error Code	Created Date	Created By
VA09M01402	190	QA	1203	01/08/2009	bvuppalanchi
VA09M01402	190	R	1215	01/08/2009	bvuppalanchi
VA09M01402	190	R	1217	01/08/2009	bvuppalanchi
VA09M01402	190	R	1225	01/08/2009	bvuppalanchi
VA09M01402	190	R	1228	01/08/2009	bvuppalanchi

If QA analyst determines Return to Reviewer, QA analyst or the manager needs to assign a new review series (new auditing process).

QA analyst or the manager will click the reviewer case tab (see figure A18) and click the Assign Case to Reviewer button as seen in figure A19.

Figure A18



Figure A19

Edit	Review Series	Assigned By	Assigned To	Assigned Dt	CMS Code	DMAS Error Code	Completed Date
	190	Lothine Pettaway	Carmel Jones	01/08/2009	U	1243	01/04/2009

[Assign Case To Reviewer](#)

Click the assign Case to Reviewer to create a new review series (new auditing as QA disagrees with Reviewer findings). See figure A20

Figure A20
Assign Case To Reviewer

Perm No

Rev Assigned By: Bhargavi Adhikari

Rev Assigned To: Jane Icalla

Rev Assigned Dt: 01/09/2009

Created Dt

Created By

Cancel Add

Case Status Report

Status History Series	Perm #	Case Status Desc	Status ID	Status Date	Changed By
141	VA09M01402	Return to Reviewer	6	01/08/2009	bvuppalanchi

Reviewer will see new Review Series 191. See below figure A21

Figure A21

REVIEWER CASE

Edit	Review Series	Assigned By	Assigned To	Assigned Dt	CMS Code	DMASError Code	Completed Date	Reviewer Comment	Created Date
	191	Bhargavi Adhikari	Jane Icalla	01/09/2009					01/08/2009
	190	Lothine Pettaway	Carmel Jones	01/08/2009	U	1243	01/04/2009	asdasd	01/07/2009

Assigned reviewer will click the latest review record and enter the CMS findings.

Figure A22

REVIEWER CASE

Edit	Review Series	Assigned By	Assigned To	Assigned Dt	CMS Code	DMASError Code	Completed Date	Reviewer Comment
	191	Bhargavi Adhikari	Jane Icalla	01/09/2009	E	1248	01/08/2009	
	190	Lothine Pettaway	Carmel Jones	01/08/2009	U	1243	01/04/2009	asdasd

Assign Case To Reviewer

Data which will be sent to CMS via excel download comes from QA screen. Most recent review series will be downloaded to excel. See figure A22. Latest review series data (191) record details will be sent to CMS.

Figure A22

QA REVIEW DETAILS

Edit	Review Series	QA CMS Code	QA DMAS Code	QA Review Decision	QA Comments	QA Reviewed By	QA Completed Date
	191	E	1248				
	190	NE	1207	4		Lothine Pettaway	01/08/2009

Working with Correspondence Section

Click the correspondence details tab.



Click “add correspondence” button as seen below.

Figure A23

CORRESPONDENCE INFO

no data found



Enter the correspondence details. Type, Requested Type etc.

Figure A24

TRACK CORRESPONDENCE

Request No 99

Perm No VA09M01402

Correspondence Type

Requested Type

Requested From

Requested Date

Due Date 01/18/2009

Received Date

Created By bvuppalanchi

Created Date 01/08/2009

Updated By

Updated Date

Due date is automatically calculated. Analyst can enter as many correspondence tracking records.

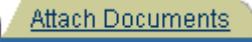
Figure A25

Perm # [REDACTED]
 Recipient Name [REDACTED]

CORRESPONDENCE INFO

Edit	Perm #	Request No	Correspondence Desc	Requested Type	Requested From	Requested Date	Due Date	Received Date	Created By	Created Da
	[REDACTED]	101	Income	Employer	Testing Company	01/12/2009	01/22/2009		bvuppalanchi	01/08/2009
	[REDACTED]	99	SSN verification requested	Recipient	Halley Troys	01/08/2009	01/18/2009		bvuppalanchi	01/08/2009

Attaching Perm Eligibility Case Documents

Click the Attach Documents tab. 

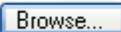
Click the browse file and attach any kind of file. Pdf / word / excel /text etc. See below. Click on the Attach Document button to attach the file.

Figure A26

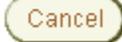
Home > PERM # SEARCH > Perm Eligibility Case Details > Perm Elig Case Document Attachments

Perm #

Recipient Name

Browse File C:\Documents and Settings\bvuppalanchi\Desktop\cms_rev_findings 

File Description Attachment 2 word document.

By	Date	Docid	Filename	Description	Type
bvuppalanchi	01/08/2009	32	Test2.doc	Attachment 2 word document.	application/msword
bvuppalanchi	01/08/2009	31	test.txt	Attachment 1.	text/plain

1 - 2

Analyst can open the saved document by clicking the filename. The file will be displayed. User has an option to open or save the file.

Validations

Validation means cross checking the data entry. Ex: Date fields need proper date format. If the user enters incomplete or in appropriate data user will come across the error screen like seen below Va1 figure.

Figure Va1

2 errors have occurred

- Enter Review Assigned Date
- Assigned Date cannot be less than 10 days.

✕

Assign Case To Reviewer

Perm No

Rev Assigned By Carmel Jones

Rev Assigned To Bill Burnette

Rev Assigned Dt 
Assigned Date cannot be less than 10 days.

Created Dt

Created By

Perm No1 VA09M10184

Inline errors that display the error message next to the field.

Case Status Report

no data found

User cannot save the already selected Case Status. User will get the below error.

Figure Va3

1 error has occurred

- Case Status Has Been Already Selected!

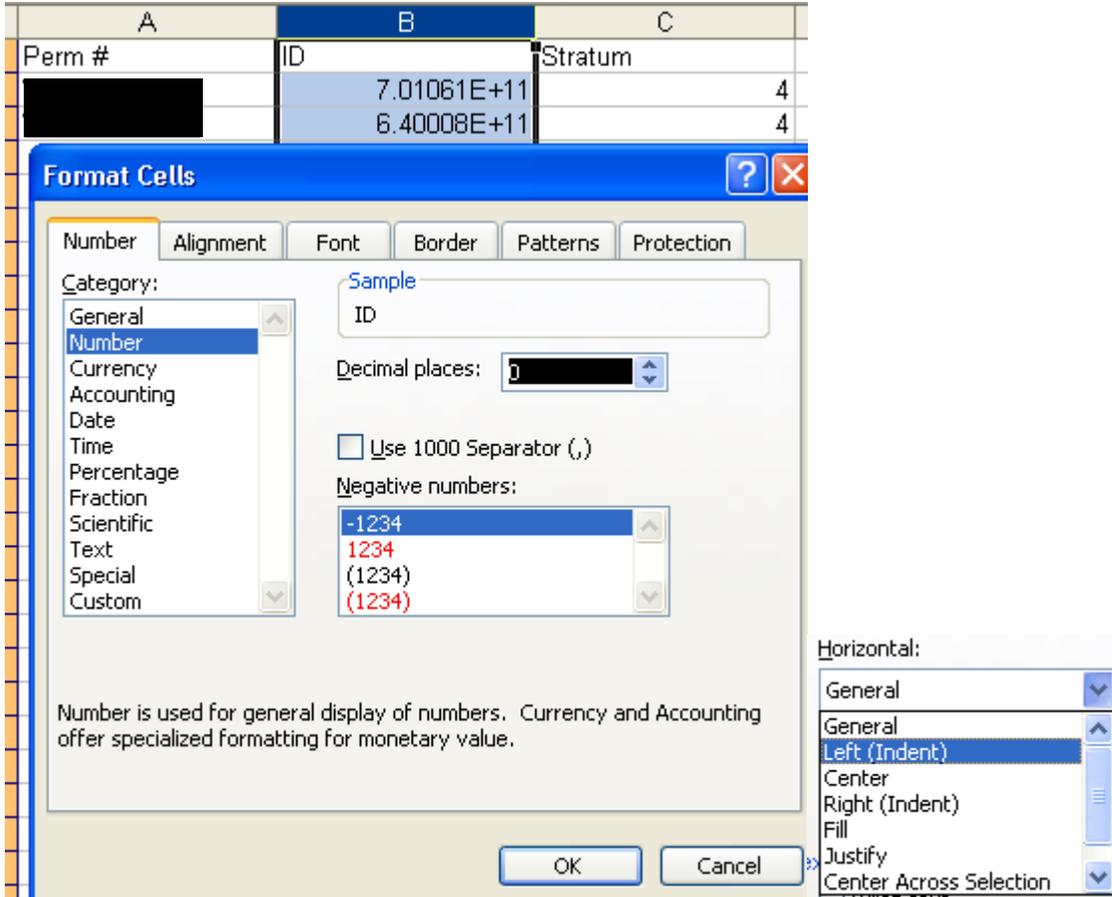
Drop Reason

Drop Date 

Case Status Date 01/13/2009  **Case Activity Status** Eligibility Error-Ready for QA Review 
Case Status Has Been Already Selected!

Downloaded File Format

Downloaded excel sometimes puts a different format for SSN and Recipient Number. In order to format to proper number highlight the column and right click to open the menu options and click properties. Select number and decimal places to 0. Alignment 2nd tab select left indent in Horizontal drop down option.



Reports

1. Case Status Report: It is the master report to search any perm case based on the case activity status. It's an interactive report where user can search a perm case using one or more criteria. Results of the report vary on the user criteria selection option. Use the browser's back button to go back to the main menu.

Figure R1

Case Status Id	Case Desc	Program	Case Type	Stratum	Sample Month	Perm No	Recip No	Name	Case Stat
2		Medicaid	Positive	1-Application	200809				01/13/2009
3		SCHIP	Positive	1-Application	200804				12/24/2008
2	Assigned to Reviewer	SCHIP	Positive	1-Application	200804				12/17/2008
3	Claims Review complete-Ready for Dropped Case	SCHIP	Positive	1-Application	200804				12/09/2008
1	Eligibility Error-Ready for QA Review No Action Taken	SCHIP	Positive	1-Application	200804				11/18/2008
1	QA Claims Review complete-Close Return to Reviewer	SCHIP	Positive	1-Application	200804				11/18/2008
1	Review Complete, No Errors-Close	SCHIP	Positive	1-Application	200804				11/18/2008
1	No Action Taken	SCHIP	Positive	1-Application	200804				11/18/2008
1	No Action Taken	SCHIP	Positive	1-Application	200804				11/18/2008

2. Closed Cases:

Displays the list of closed cases for the selected sample month as seen below figure R2. User can download into excel by clicking the download.

Figure R2 (Names and Recipient IDs have been removed for HIPAA compliance.)

Perm Eligibility User Guide

Sample Month ▼

Closed Cases

Program	Perm #	Recipient #	Name
SCHIP			

Download 1 - 10

3. Open Case(s).

Shows the data of open cases for the selected sample month. See figure R3

Figure R3

Sample Month ▼

Open/Active Cases

Case Status	Program	Name	Perm #	Recipient #
Assigned to Reviewer	Medicaid			
Assigned to Reviewer	Medicaid			
No Action Taken	Medicaid			
No Action Taken	Medicaid			
No Action Taken	Medicaid			
No Action Taken	Medicaid			
No Action Taken	SCHIP			
No Action Taken	SCHIP			

Download row(s) 1 - 30 of 45 ▼ Next ▶

Manager can go and assign the perm cases to reviewer by clicking the Perm No. A regular user doesn't see the Perm No.

4. Reviews Assigned To.

It's an interactive report. User can search on several fields or in combination. User can search by Reviews assigned to or assigned by. Etc. Below figure R4 shows the cases assigned by "slong" and cases assigned to "crjones". User can check and uncheck the filter or remove the filters or add more filters. Search capability is not limited to one field. Use the browser's back button to go back to the main menu.

Perm Eligibility User Guide

Figure R4

Perm No	Case Desc	Rev Assigned By	Rev Assigned To	Rev Assigned Dt	Rev Completed Dt	Sample Month	Case Status	Id
	No Action Taken	slong	crjones	11/22/2008	11/25/2008	200804		1
	Assigned to Reviewer	slong	crjones	12/09/2008	-	200804		2
	No Action Taken	slong	crjones	11/25/2008	11/25/2008	200804		1
	Review Complete, No Errors-Closed	slong	crjones	12/05/2008	12/05/2008	200804		3
	Assigned to Reviewer	slong	crjones	12/22/2008	-	200802		2

5. Sample Month- Due Date Report

Gives the list of sample months in the system with 105th day, 125th day, 150th day and 210th day due dates. Report automatically calculates the sample month end of the month and various due dates. User can download into excel also.

Figure R5

Home > [Sample Month Due Date Report](#)

Sample Month Due Dates

SAMPLE_MONTH ▼	End of Sample Month	105 Day Due Date	125 Day Due Date	150 Day Due Date	210 Day Due date
200810	10/31/2008	02/13/2009	03/05/2009	03/30/2009	05/29/2009
200809	09/30/2008	01/13/2009	02/02/2009	02/27/2009	04/28/2009
200808	08/31/2008	12/14/2008	01/03/2009	01/28/2009	03/29/2009
200807	07/31/2008	11/13/2008	12/03/2008	12/28/2008	02/26/2009
200806	06/30/2008	10/13/2008	11/02/2008	11/27/2008	01/26/2009
200805	05/31/2008	09/13/2008	10/03/2008	10/28/2008	12/27/2008
200804	04/30/2008	08/13/2008	09/02/2008	09/27/2008	11/26/2008
200802	02/29/2008	06/13/2008	07/03/2008	07/28/2008	09/26/2008
200801	01/31/2008	05/15/2008	06/04/2008	06/29/2008	08/28/2008

Download 1 - 9

6. Reviewer Case Count.

Counts the total number of cases assigned for a reviewer for that sample month. Select the month you want to see the list of reviewers and their total number of cases assigned to them. If user wants to get more information about what cases they have been assigned click on the Reviewer name to get the 2nd result set that displays the perm no and review series.

Figure R6

Perm Eligibility User Guide

Home > Reviewer Case Count

Reviewer Case Count

Sample Month

Reviewer	Case Count
bburnette	2
crjones	4
jbeard	1
jicalla	1
slong	1

1 - 5

Show Perm Cases For Reviewer

Reviewer

Perm #	Review Series	Review Completed Date
	202	-
	194	-
	183	12/24/2008
	195	-

1 - 4

7. 105, 125th Day Report.

User can select the sample month and days whether 105 or 125 days and click on Get Report button to see the results. It will display the records that have open cases by 105th or 125th day. User can download the list.

Figure R7

Home > 105_DAY_RPT

SelectMonth

Days

Sample Month

PERM_NO	RECIP_NO	Name	CASE STATUS ▲
			Assigned to Reviewer
			No Action Taken
			No Action Taken

Download

1 - 3

Perm Eligibility User Guide

8. 150 Day Active Case Findings to CMS.

This report is very important as the data from this report is downloaded into excel and copied to PERT excel which will be uploaded to CMS via PERT system.

Display report shows more fields than the downloaded data. Report data has been formatted so that it will be copied to PERT excel file. User selects the sample month and downloads the data to excel.

Figure R8

Home > 105_DAY_RPT > Active Case Review

Active 150 Day Report

Sample Month: 200804

PERM_NO	SAMPLE_MONTH	Dropped Reason	STRATA	Status	REVIEW_SERIES	CMS Findings	Error Reason
	200804		1	Review Complete, No Errors-Closed	177	E	No DMAS Errors Found-T
	200804		1	Assigned to Reviewer	182		-
	200804		1	Review Complete, No Errors-Closed	166	EI	Incorrect calculation of spenddown that does not affect eligibility-T
	200804		1	No Action Taken	144	NE	Enrollee dropped creditable health insurance in the past four months without good cause-E
	200804		1	No Action Taken	134	EI	Enrollee did not begin LTC within 30 days of the Notice of Action on Medicaid. Applicable to 300% group only-E
	200804		1	QA Claims Review complete-Closed	136	U	Enrollee currently has creditable health insurance-E
	200804		1	Return to Reviewer	172	E	Incorrect calculation of spenddown that affects eligibility-E

9. 150 Day Negative Case Findings to CMS.

This report is very important as the data from this report is downloaded into excel and copied to PERT excel which will be uploaded to CMS via PERT system.

Display report shows more fields than the downloaded data. Report data has been formatted so that it will be copied to PERT excel file. User selects the sample month and downloads the data to excel.

Figure R9

Home > 105_DAY_RPT > 150 Day Negative Cases

Negative Cases

Sample Month: 200804

Perm No	Case Source	Denial/Termination	Strata	Status	Review Series	Cms Findings	Error Reason
VA09S04401	CPU	D	4	QA Claims Review complete-C (Sort by this column)	193	U	Case File information not available, record recreated.-T
VA09S04402	CPU	D	4	Review Complete, No Errors-Closed	181	ID	-
VA09S04409	SAS	T	4	No Action Taken	128	E	Citizenship/identity not signed and dated as an original-T
VA09S04415	CPU	D	4	Eligibility Error-Ready for QA Review	180	C	-
VA09S04416	CPU	D	4	Assigned to Reviewer	188	IT	-
VA09S04417	CPU	D	4	Assigned to Reviewer	175		-
VA09S04420	SAS	T	4	Assigned to Reviewer	178	E	Incorrect calculation of spenddown that affects eligibility.-E
VA09S04423	CPU	D	4	No Action Taken	141	E	Application not signed.-T
VA09S04424	SAS	T	4	Dropped Case	145	EI	Incorrect calculation of spenddown that does not affect eligibility.-T

Download

1 - 9

10. Correspondence Tracking.

It's an interactive report. You can search for any correspondence request made by the user. User can put one or more criteria to display the results. Below figure R10 gets the correspondence type "Resources". Use the browsers back button to go back to the previous menu option or the home page.

Figure R10

Perm Eligibility User Guide

Home > Correspondence Tracking Report

Search: Rows: 15

Correspondence Desc = 'Resources'

Perm No	Correspondence Desc	Requested From	Requested To	Requested Dt	Due Date	Received Date
VA09S04121	Resources	Employer	-	12/04/2008	12/14/2008	-
VA09S04424	Resources	Bank	asdasdasd	12/24/2008	01/03/2009	-
VA09S04416	Resources	Landlord	khk	12/22/2008	01/01/2009	-

1 - 3

11. CMS - DMAS Cross Reference

Every Active/Positive CMS Code can have one or more DMAS error codes. Report gives the list of DMAS error codes and associated CMS.

Figure R11

Home > Add / Edit CMS Review Findings Master >

DMAS CMS CROSS REF

DMAS ERROR CODE	CMS CODE
1201	E
1202	NE
1203	NE
1204	E
1205	E
	EI
	NE

Working With Admin Options.

Only the Perm Managers can view the Admin options. They can update some of the lookup tables and perform data load to Perm system.

1. Update Case Status

Modify the Case Status Description and click the submit button. Manager can add a new Status by pressing Add Row.

Figure Ad1

Perm Eligibility User Guide

Home > Add / Edit Case Activity Status Master

Cancel Save

Add/Edit Perm Eligibility Case Status Values

Status Id	Status Desc
0	Dropped Case
1	No Action Taken
2	Assigned to Reviewer
3	Review Complete, No Errors-Closed
4	Eligibility Error-Ready for QA Review
5	QA Review complete-Request Claims
6	Return to Reviewer
7	Claims Review complete-Ready for QA review
8	QA Claims Review complete-Closed

1 - 9

Add Row

2. Add/ Edit CMS Code

Can Add or edit the CMS code description. Any thing user modifies need to press save button in order to save the data.

Figure Ad2

Home > Add / Edit CMS Review Findings Master

Cancel Save

Add/Edit Perm CMS CODES

CMS CODE	CMS CODE DESC	CMS CODE DESC LONG	CASE TYPE
1	E	Eligible	1
2	EI	Eligible with ineligible services	1
3	NE	Not Eligible -An Individual Beneficiary is receiving benefits under the program but does not meet t	1
4	U	Undetermined- A beneficiary case subject to a medicaid or Schip eligibility determination under P	1
5	L/O	Liability Overstated	1
6	L/U	Liability Understated	1
7	MCE1	Manged Care Error, Ineligible for managed care	1
8	MCE2	Manged Care Error, eligible for managed care but improperly enrolled	1
11	C	Correct	2
12	ID	Imporper denial	2
13	IT	Improper Termination	2

Download - CMS Findings | Print

1 - 11

Add CMS Code

3. Perm Eligibility Users:

Manager can add or edit the perm users. Manager can activate or inactivate the account based on the perm user. Manager can decide the perm role a user can have in the perm eligibility system.

Perm Eligibility User Guide

Manager can edit the user role or active/ inactive status by clicking the Edit button. See figure Ad3.

Figure Ad3

Home > Perm Users Report

PERM Users Report

Edit	First Name ▲	Last Name	Role Type	Active	Inactive
	Bhargavi	Adhikari	PERM_MANAGER	A	
	Bill	Burnette	PERM_REVIEWER	A	
	Carmel	Jones	PERM_MANAGER	A	
	Jane	Icalla	PERM_READ_ONLY	A	
	Jeff	Beard	PERM_REVIEWER	A	
	Ken	Martin	PERM_QA	A	
	Lothine	Pettaway	PERM_MANAGER	A	
	Sharon	Long	PERM_MANAGER	A	

1 - 8

[Add Perm Users](#)

In order to add a new user to Perm system click on Add Perm Users button. Edit or Add Perm Users Button takes to the below screen. See figure Ad4.

Figure Ad4

Home > Perm Users Report > Add/Edit Perm Users

Add/Edit Perm Users

Login ID

First Name

Last Name

*** Access Level (Role)** ▼

*** Active/Inactive** ▼

Edit or add the login Id and enter the other details. Select the access level and active or inactive status. Save the record.

4. Update DMAS Error Codes

Edit the Error description or error type and save the record.

Perm Eligibility User Guide

Figure Ad5

Home > Update DMAS Error Codes

Update DMAS Error Codes

Dmas Error Code ▲	Dmas Error Desc	Error Type
1226	Incorrect calculation of spenddown that does not affect eligibility.	Technical
1227	Verification of pregnancy not in record	Eligibility
1228	Enrollee dropped creditable health insurance in the past four months without good cause	Eligibility
1229	Enrollee is a member of a family eligible for health benefits coverage under the State Employee Health Insurance Plan	Eligibility
1246	DMAS 122 not in case record	Technical
1247	Notice of Obligation not in case record	Technical
1248	No DMAS Errors Found	Technical

5. Load Perm Data.

Jim Starkey gives 8 excel sheets to Perm team every month.
 We have 2 ways to load the data into perm system.

Formatting Excel Sheet

Figure Ad6

SAMPLE_ID_NBR	ENROLL_R_L	NAM_R_F	NAM_R_M	SSNBR	BIRTH	CASE_L	CASE_F	FIPS	REG_NAM	SOURCE	DENIAL_CAID_CAT	CASEWORK
---------------	------------	---------	---------	-------	-------	--------	--------	------	---------	--------	-----------------	----------

1. We need data of column A- P (Sample Month- CaseWork). Remove or delete the extra columns after P (Casework).
2. Make sure Case_L_NAME is column is before Case_F_NAME
3. Final formatted excel sheets needs to be saved as Comma Delimited file.
4. Excel sheet is ready to be loaded.
5. No need to delete the first row which got the column names.

Formatted Excel Sample Figure Ad7

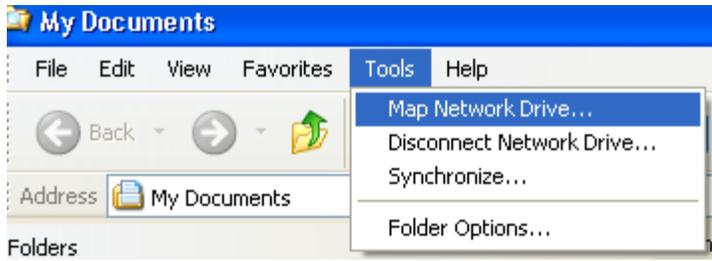
	067	PIEDMONT	SAS	092	M3929
	149	CENTRAL	SAS	053	G502

Mapping Perm_Elig Directory to Network Drives:

➤ Note: Perm_Elig.csv is saved on the DMASORA server location. Only few users have access to that server location. Oracle DBA will give access to that location. As a end user users can you any of the available drives to Map to PERM UAT or Production files.

Before you map the network drive make sure you got rights to access the shared drive.

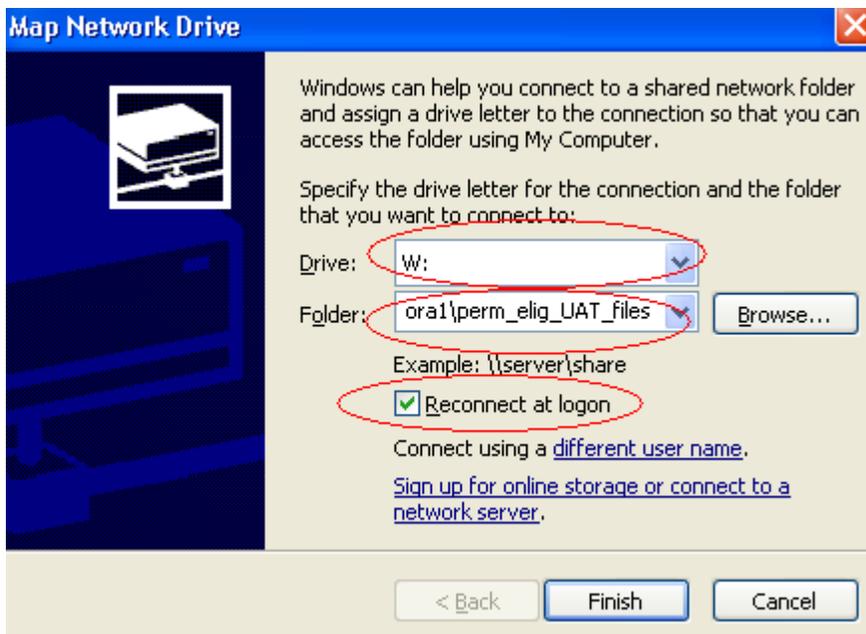
Perm Eligibility User Guide



Open the windows explorer page and click Tools → Map Network Drive .

See the highlighted area in the below figure. Click Drive select list and choose any available drive.

Enter or copy the below link in Folder: location. Click Reconnect at Login.



Production Mapping Link: \\dmasora\perm_elig_prod_files

UAT Mapping Link: \\dmasora1\perm_elig_UAT_files

Make sure you copy the two slashes(\\).

The file saved in the Perm_elig_prod_Files directory moves the data into temporary table.

Load the data by logging into perm system and go to Admin → Load Perm Data → click the Load perm Data Button as seen in **figure Ad8**.

Figure Ad8

Temporary Data Values



Perm Eligibility User Guide

Home > PERM LOAD TRACK

From Date: 01/12/2009
To Date: 01/13/2009 Show Load History

Perm Eligibility Temporary Data

SAMPLE_MONTH	ID_NBR	ENROLL_ID	R_L_NAME	R_F_NAME	R_M_NAME	SSNBR	BI
200809	VA09M09102	0	new id	new id	-	123456789	07/0

Load Perm Data
Load Perm Data

Load Data History

Insert_Reject	Count	Load Date	Loaded By
INSERT	1	01/13/2009	bwuppalanchi
REJECT	0	01/13/2009	bwuppalanchi
INSERT	1	01/13/2009	bwuppalanchi
REJECT	0	01/13/2009	bwuppalanchi
REJECT	0	01/12/2009	bwuppalanchi
INSERT	1	01/12/2009	bwuppalanchi
INSERT	0	01/12/2009	bwuppalanchi
REJECT	1	01/12/2009	bwuppalanchi
INSERT	1	01/12/2009	bwuppalanchi
REJECT	0	01/12/2009	bwuppalanchi

1 - 10

Click this to load the data

Load History Information



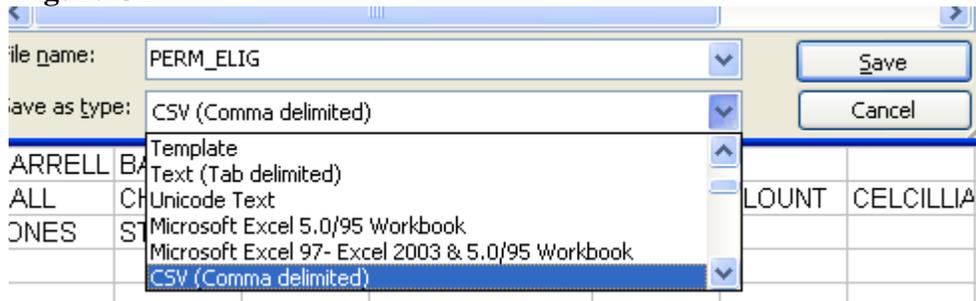
When the Load Perm Data button is click, message box with 2 options pops up. If user clicks OK, data is loaded, if cancel option is clicked, load process is cancelled.

Loading Perm Data using several Excel files.

1. Format the each excel sheet by following the steps in Formatting Excel Sheet section.
2. Save the first excel as Perm_elig.csv on your desktop or save directly on the mapped drive to perm_elig_prod_files location. Make sure you save that file as CSV. (Use save as option).

See the figure C1 to select the Save as Type. Select CSV (Comma Delimited)

Figure C1



3. Make sure the Temporary data matches with that of excel file saved on the server.
4. Load the data by logging into perm system and go to Admin → Load Perm Data → click the Load perm Data Button as seen in **figure Ad8**
5. Load Data History shows the count of records that have been loaded. Gives the basic load information. Figure Ad8

Perm Eligibility User Guide

- Once the first file is loaded, format the 2nd excel file by following the steps in formatting excel sheet and save as perm_elig.csv and load the data by following step 5.
- Repeat the processes 1-5 for each excel.

➤ Note: Make sure you click the LOAD PERM DATA button after you save the perm_elig.csv file on the server.

Load History Information

See figure Ad8.

For every perm load a record is generated.

Perm User can get a basic idea as when the file has been loaded. How many records have been inserted and how many have been rejected, date and person loaded.

Per perm load if you see any rejected count, click on the reject hyperlink (Figure Ad9) in the Load PERM DATA Screen (Figure Ad8)

Figure Ad9

REJECT	0	01/12/2009	bvuppalanchi
INSERT	1	01/12/2009	bvuppalanchi
REJECT	14	01/07/2009	bvuppalanchi
INSERT	0	01/07/2009	bvuppalanchi
REJECT	0	01/07/2009	bvuppalanchi

Reject Hyperlink takes to another screen where you can see which PERM Cases have been rejected in the load. **Figure Ad10**

Home > PERM LOAD TRACK > Perm Rejected Cases

Perm Rejected Cases

Load Date 01/07/2009

Rejected Dt ▲	Sample Month	User Name	Id	Perm #
01/07/2009	200810	bvuppalanchi	331	VA09S10401
01/07/2009	200810	bvuppalanchi	332	VA09S10402
01/07/2009	200810	bvuppalanchi	333	VA09S10403
01/07/2009	200810	bvuppalanchi	334	VA09S10404
01/07/2009	200810	bvuppalanchi	335	VA09S10405
01/07/2009	200810	bvuppalanchi	336	VA09S10406
01/07/2009	200810	bvuppalanchi	337	VA09S10407
01/07/2009	200810	bvuppalanchi	338	VA09S10408
01/07/2009	200810	bvuppalanchi	339	VA09S10409

➤ Note: Usually we see rejects when that perm number exists already in the Perm Eligibility system.

6. Add Edit Perm Common Values Lookup Data.

Figure Ad11

Home > Update Perm Common Data Master

Add/Edit Perm Eligibility Common Data Cancel Submit

Perm Common ID	Group Id	Item Description
1	CASE_TYPE	Positive
2	CASE_TYPE	Negative
3	DMAS_REV_DECISION	Agree
4	DMAS_REV_DECISION	Disagree
18	CORRES_TYPE	Citizenship requested
19	CORRES_TYPE	Disability verification requested
20	CORRES_TYPE	Health insurance card/ Third Party Liability (TPL) needed

Download row(s) 1 - 20 of 36 Next

Add Row

Most of the common lookup values on stored on this screen. User can edit the item description anytime and save the record.

User can add a new item or new group to this table.

To add a new item

Ex: adding new value item to Correspondence type.

Click the Add Row and enter the Group ID as CORRES_TYPE and add the description. Make sure CORRES_TYPE is in capital and existing one.

To add a new group and items:

Perm users need a new group of items to be displayed on the screen this is the place where they enter the values. Ex: User wants to create a new group that will be shown as list or dropdown menu in the perm screen. Click on the Add ROW and add a new group ID "REVIEWER_LEVEL". Items can be 1st and 2nd reviewer level. Save the record.

Figure Ad12

37	REQUESTED_TYPE	Other
39	REVIEWER_LEVEL	1st Level Review
(null)	REVIEWER_LEVEL	2nd Level Review

Download Previous row(s) 21 - 38 of 38

New group **New Items**

7. Assigning Cases To Reviewer At A Time By Manager.

To save some time manager can assign several cases using Open Case(s) report.

See figure Ad13

Figure Ad13

PERM ELIGIBILITY MENU

Admin ▾ Reports ▾ Search Perm Case(s) ▾

- Case Status Report
- Closed Cases
- Open Case(s)**
- Reviews Assigned To

Select the Sample Month you want to assign the data. Figure Ad14. Click the Perm# you want to assign. It takes to the screen as seen in **Figure Ad15**

Figure Ad14

Home > Open/Active Cases

Sample Month ▾

Open/Active Cases

Case Status	Program	Name	Perm #	Recipient #
No Action Taken	Medicaid		VA09M10401	
No Action Taken	Medicaid		VA09M10317	
No Action Taken	Medicaid		VA09M10403	
No Action Taken	Medicaid		VA09M10404	
No Action Taken	Medicaid		VA09M10405	
No Action Taken	Medicaid		VA09M10406	
No Action Taken	Medicaid		VA09M10407	
No Action Taken	Medicaid		VA09M10408	

Click to go to Ad15 screen

Figure Ad15

Assign Case To Reviewer

Perm No

Rev Assigned By ▾

Rev Assigned To ▾

Rev Assigned Dt

Created Dt

Created By

Perm No1 VA09M10408

Perm Eligibility User Guide

Once you click the add button, click on Home or open/Active Cases menu option in the bread crumb location.. [Home](#) > [Open/Active Cases](#) > .