

Referral, Enrollment, and Disenrollment

09/27/2023

Agenda

Referral

Creating a New Health Record

Adding a New Referral

Action Items

Closing the Referral

Enrollment

Enrollment Workflow

New Prospective Enrollment

Plan Enrollment Contract

Sponsor & TPA Contracts

Enrollment Dashboard & Reporting

Disenrollment

Cleaning the Chart

Terminating the Contracts


Inactivating the Medical Record

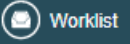
Referral

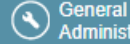



Creating a New Health Record

Creating a New Health Record

 **TruChart**
QA PACE

 Worklist 1

 General Administration ▼

Open Participant Record 

Inbox

Active — 6141 ▼
User: admin

My Auth Reviews

Sort By Date ▼

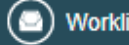
My Auth Processing


ANDERSON, KENNETH
Progress Notes
QP1 9/12/2023


PARKER, JAMES
Participant HX Form
QP1 9/6/2023

PARKER, JAMES
LIFEplan Management

My Schedule

 Worklist 1

 General Administration ▼

Open Participant Record 


Active — 6141 ▼
User: admin

Sort By Date ▼

ANDERSON, KENNETH
Progress Notes
9/12/2023

PARKER, JAMES
Participant HX Form
9/6/2023

PARKER, JAMES
LIFEplan Management

Participant Search 

Creating a New Health Record

Advanced Search

Acct #

Last

First

Find

Membership

Active

Branch/Team

(All)

Medicaid ID

Medicare ID

Acct #	Name	Birthdate	Phone Number
<div>New</div>			

Creating a New Health Record

Existing Patients

Acct #

Name

DOB

SSN

Patient Demographics

Last Name:

Test

First Name:

Joe

Date of Birth:

04/17/1958

SSN

678563456

Medicaid ID

Enter Medicaid ID...

Medicare ID

Enter Medicare ID...

Search

Search & New

Close

Creating a New Health Record

New Participant

Basic Information

Last Name:TEST

First Name:JOE

Middle Name:

Preferred Name:

DOB:04/18/1957

Sex:Unknown

Marital Status:---

Photo:Add Photo

Email:

Account Number:TEST11059

Alt #:

External EMR:

AlayaCare ID:

SSN:567652536

Center:-- Specify --

Team:None

Default Pharmacy:None

Care Manager:New

Acuity Level:New

Day Center Acuity Level:--Unspecified--

Medicaid Case Number:

Medicaid Family Indicator:--Unspecified--

☐ Active in PatientConnect (PatientConnect Status = Unregistered)

Save

Cancel

Close

Creating a New Health Record

Participant Information	TruChart Location	Special Notes
Center or Region	Health Record > Info > Basic Information	Required to create a health record.
First Name	Health Record > Info > Basic Information	Required to create a health record.
Last Name	Health Record > Info > Basic Information	Required to create a health record.
Date of Birth	Health Record > Info > Basic Information	Required to create a health record.
Social Security Number	Health Record > Info > Basic Information	Required to create sponsor contract.
Sex	Health Record > Info > Basic Information	Required to create sponsor contract.
Physical Home Address	Health Record > Info > Participant Addresses	Required to create sponsor contract. The address From Date must be in effect the day the enrollment is being completed.
Home or Mobile Number	Health Record > Info > Participant Contact Points	Required to create sponsor contract. The phone number From Date must be in effect the day the enrollment is being completed.
Referral Source and Date	Health Record > Info > Medical Record	Referral Source is a managed list.
Medicare Number	Health Record > Info > Medicare	If the participant has Medicare. This can be the HIC# or the MBI.
Medicaid Number	Health Record > Info > Medicaid	If the participant has Medicaid.

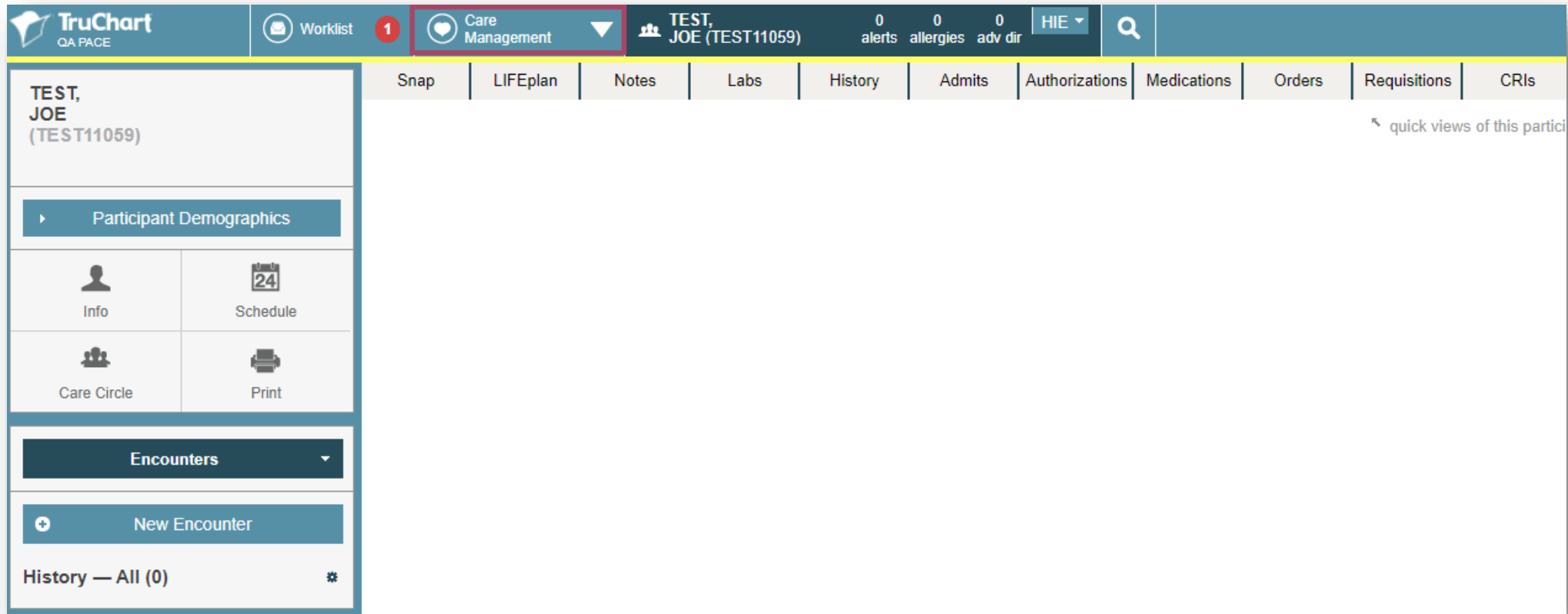
Demo





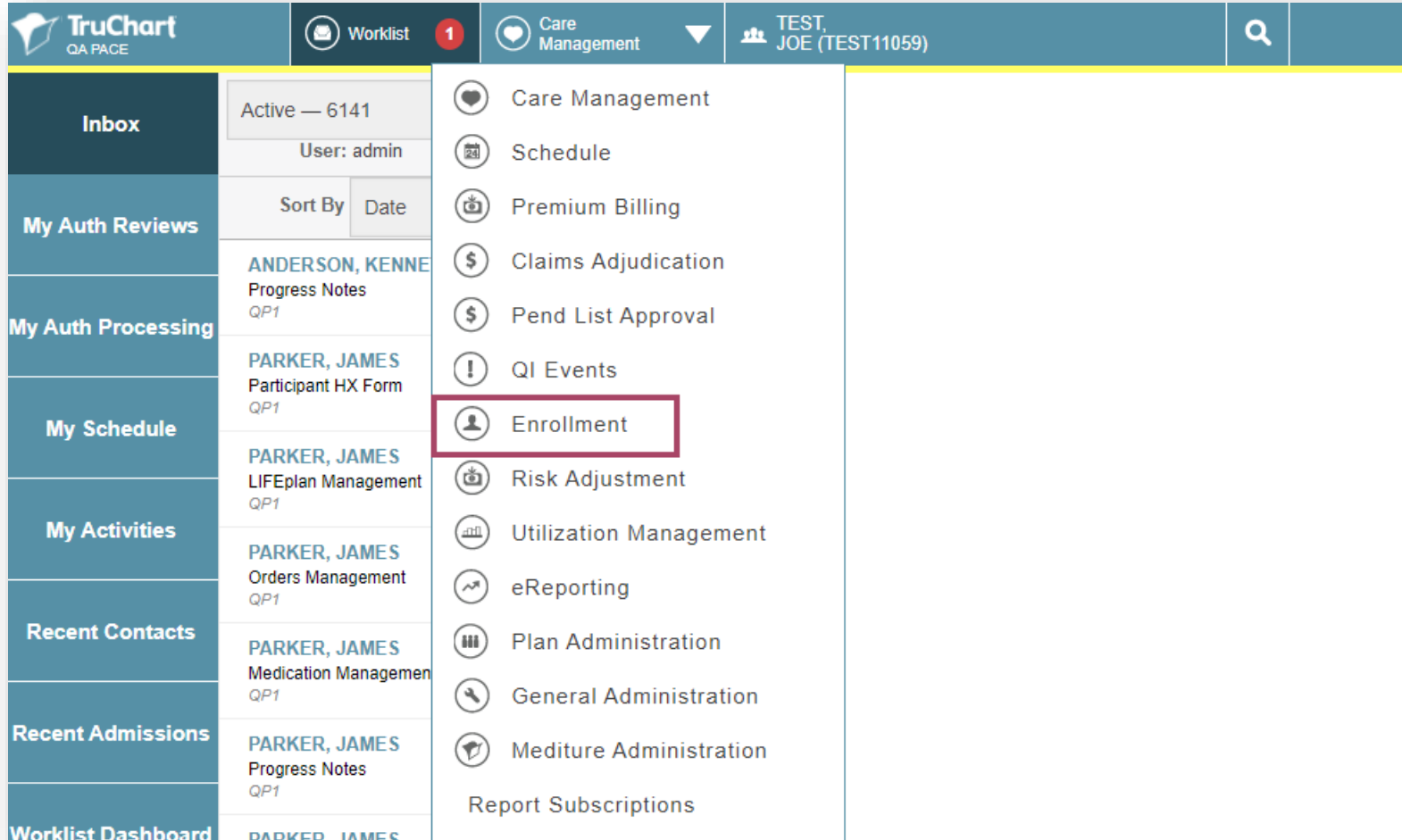
Adding a New Referral

Adding a New Referral



The screenshot displays the TruChart interface for patient TEST, JOE (TEST11059). The top navigation bar includes the TruChart logo, a Worklist icon with a red notification badge, and the Care Management tab, which is highlighted with a red border. To the right of the Care Management tab, there are icons for alerts, allergies, and advanced directions, each with a count of 0. A search icon is also present. The main content area features a series of tabs for patient data: Snap, LIFEplan, Notes, Labs, History, Admits, Authorizations, Medications, Orders, Requisitions, and CRIs. The left sidebar contains a section for Participant Demographics, including Info, Schedule, Care Circle, and Print. Below this is a section for Encounters, with a New Encounter button and a History — All (0) link.

Adding a New Referral



The screenshot displays the TruChart QA PAGE interface. The top navigation bar includes the TruChart logo, a Worklist tab with a red notification badge, a Care Management dropdown, and a user profile for TEST, JOE (TEST11059). The left sidebar contains several menu items: Inbox, My Auth Reviews, My Auth Processing, My Schedule, My Activities, Recent Contacts, Recent Admissions, and Worklist Dashboard. The 'Enrollment' option is highlighted with a red box. The main content area shows a list of tasks with icons and labels: Care Management, Schedule, Premium Billing, Claims Adjudication, Pend List Approval, QI Events, Enrollment, Risk Adjustment, Utilization Management, eReporting, Plan Administration, General Administration, and Medituration Administration. Below these tasks is a 'Report Subscriptions' section.

Menu Item	Sub-item
Inbox	Active — 6141 User: admin
My Auth Reviews	Sort By Date
My Auth Processing	ANDERSON, KENNE Progress Notes QP1
My Schedule	PARKER, JAMES Participant HX Form QP1
My Activities	PARKER, JAMES LIFEplan Management QP1
Recent Contacts	PARKER, JAMES Orders Management QP1
Recent Admissions	PARKER, JAMES Medication Management QP1
Worklist Dashboard	PARKER, JAMES

- Care Management
- Schedule
- Premium Billing
- Claims Adjudication
- Pend List Approval
- QI Events
- Enrollment
- Risk Adjustment
- Utilization Management
- eReporting
- Plan Administration
- General Administration
- Medituration Administration
- Report Subscriptions

Adding a New Referral

TruChart
QA PACE

Worklist 1

Enrollment ▼

TEST, JOE (TEST11059)

Q

Referrals

Plan Enrollment Contracts

Sponsor Contracts

Subcontracts

TPA Contracts

Enrollment Dashboard

☒ All (7,832)

☐ Open (18)

☐ Closed (7,811)

☐ Entered in Error (3)

Actions

New Patient

New Referral

Import OEC File

Rows: 7,832

Participant Q

Plan Enrollment Status Q

Expected Enrollment Date Q

<input type="checkbox"/>	Action ▼	TRAVIS, TUCKER (54133)	Entered in Error
<input type="checkbox"/>	Action ▼	WAY, ALTERNATE (54136)	Entered in Error 05/01/2019
<input type="checkbox"/>	Action ▼	WAY, ALTERNATE (54137)	Entered in Error
<input type="checkbox"/>	Action ▼	ADAMS, JOHN (957)	Approved
<input type="checkbox"/>	Action ▼	TRAVIS, TUCKER (54431)	Entered in Error
<input type="checkbox"/>	Action ▼	GARY, OPTIC (54471)	Entered in Error
<input type="checkbox"/>	Action ▼	DE, FAR (54704)	Approved

Adding a New Referral

Create New Referral

Referral Source:

Search Referral Source...

☐ Include Inactive

Referral Date:

09/18/2023

Secondary Referral Source:

Search Referral Source...

☐ Include Inactive

How Did You Hear About Us:

-- Select --

Expected Enrollment Date:

Patient:

Search Member by Benefit Plan

Search Participant...

☐ Include Inactive

Save & Close

Cancel



Action Items

Action Items

Sponsor Contracts

Subcontracts

TPA Contracts

Enrollment Dashboard

Reports

CFCO CU File Audit

OSDS Plan Member Report

☐ Rows: 1

Participant

TEST, JOE (87272)

DOB: 1949-02-15

Plan Enrollment Status

Expected Enrollment

☐

Action

Edit Demographics

Generate Referral Letters

Edit Referral Info

Check Eligibility

Edit Medicare Eligibility Info

Edit Outreaches

Edit Documents

Edit Assessment Information

Reassign Referral User

Reassign Assessment User

Add Notes

New Prospective Enrollment

Close Referral

Entered in Error

Download CSV

TEST, JOE (87272)

10/01/2023

Demo





Closing the Referral

Closing the Referral

Sponsor Contracts

Subcontracts

TPA Contracts

Enrollment Dashboard

Reports

CFCO CU File Audit

OSDS Plan Member Report

☐ Rows: 1

Participant

TEST, JOE (87272)

DOB: 1949-02-15

☐

Action

TEST, JOE (87272)

Edit Demographics

Generate Referral Letters

Edit Referral Info

Check Eligibility

Edit Medicare Eligibility Info

Edit Outreaches

Edit Documents

Edit Assessment Information

Reassign Referral User

Reassign Assessment User

Add Notes

New Prospective Enrollment

Close Referral

Entered in Error

Download CSV

Close Referral - TEST, JOE (87272)

Date Closed:

09/18/2023

Reason for Closing:

Not Interested, Enrolled in Another Plan

Save & Close

Cancel

Entered in Error

Sponsor Contracts

Subcontracts

TPA Contracts

Enrollment Dashboard

Reports

CFCO CU File Audit

OSDS Plan Member Report

☐ Rows: 1

Participant
TEST, JOE (87272)
DOB: 1949-02-15

☐ Action

TEST, JOE (87272)

Edit Demographics

Generate Referral Letters

Edit Referral Info

Check Eligibility

Edit Medicare Eligibility Info

Edit Outreaches

Edit Documents

Edit Assessment Information

Reassign Referral User

Reassign Assessment User

Add Notes

New Prospective Enrollment

Close Referral

Entered in Error

Download CSV

Entered in Error

Are you sure you want to move 1 referral(s) to Entered in Error?

Ok

Cancel

Enrollment



Enrollment Workflow

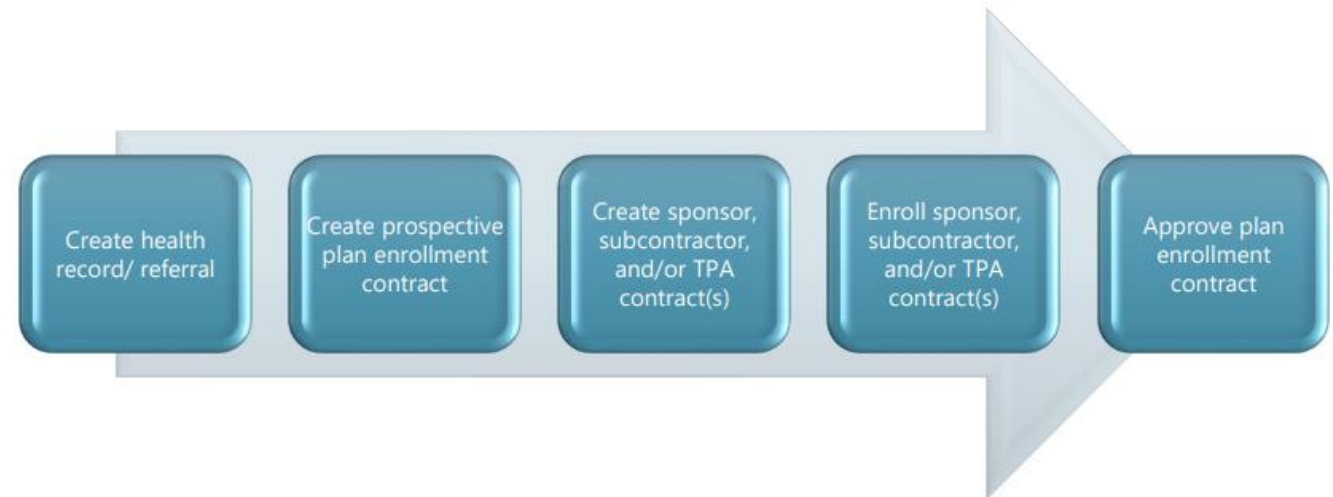
Enrollment Workflow

At its highest level, the enrollment module is used to manage incoming prospective participants through to approval in your organization's plan.

Within the module, users can create the following for a prospective enrollee:

- Health record
- Referral record
- Prospective Plan Enrollment contract
- Sponsor contract(s)
- TPA contract(s)

The following image shows an overview of the enrollment process for a prospective participant:

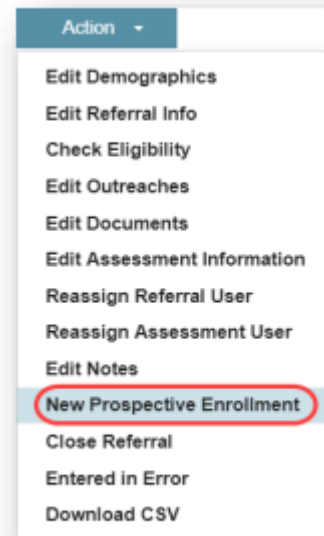




New Prospective Enrollment

New Prospective Enrollment

Creating a new prospective plan enrollment contract for a referral will also close the referral. Typically, this will be used when the referral is joining your organization.





Plan Enrollment Contract

Plan Enrollment Contract

This tool is used to manage plan enrollment contracts. The plan enrollment contracts have multiple statuses:

- All
- Prospective
- Approved
- Under Care
- Ready for Termination
- Terminated
- Not Enrolled
- Entered in Error

<input checked="" type="radio"/> All (52)	<input type="radio"/> Prospective (5)	<input type="radio"/> Approved (34)	<input type="radio"/> Ready for Termination (1)	<input type="radio"/> Terminated (8)
		<input type="radio"/> Under Care (33)		<input type="radio"/> Not Enrolled (4)
				<input type="radio"/> Entered In Error (0)



Sponsor and TPA Contracts

Sponsor Contracts/TPA Contracts

This tool is used to manage the sponsor contracts and the TPA contracts for the participants. The sponsor and TPA contracts have the same status options:

- All
- Ready to Send
- Submitted
- Enrolled
- Terminated
- Not Enrolled
- Entered in Error

Benefit Plan:
TruChart PACE ▼

<input checked="" type="radio"/> All (94)	<input type="radio"/> Ready to Send (7)	<input type="radio"/> Enrolled (77)	<input type="radio"/> Terminated (8)
	<input type="radio"/> Submitted (0)		<input type="radio"/> Not Enrolled (2)
	<input type="radio"/> Submittal Response (0)		<input type="radio"/> Entered In Error (0)



Enrollment Dashboard and Reporting

Enrollment Dashboard and Reporting

Enrollment Dashboard:

- Provides an overview of the total number of participants in each enrollment status

Reporting:

- Aggregate reports
- Smart table
- Views can be saved and shared
- Download as CSV

Disenrollment



Cleaning the Chart

Remove Future Appointments

ALPHON, AVA (122333) - Schedule

Participant

ALPHON, AVA (122333)

Date

06/15/2023

Slot Duration

5 min

Recurrences

Today and Futu

Resizable

Drag And Drop

June 2023

Sun	Mon	Tue	Wed	Thu
28	29	30	31	1
		9:30a PACE Day Center - Center Day	3:15p JASON - Eval for improvement & repeat GDS	9:30a PACE Day Center - Center Day
4	5	6	7	8
	9:30a PACE Day Center - Center Day			9:30a PACE Day Center - Center Day
11	12	13	14	15
	9:30a PACE Day Center - Center Day			9:30a PACE Day Center - Center Day
18	19	20	21	22
	9:30a PACE Day Center - Center Day			9:30a PACE Day Center - Center Day
25	26	27	28	29
	9:30a PACE Day Center - Center Day			9:30a PACE Day Center - Center Day

Edit Event

Pick Up: h:mmma

Return: h:mmma

Safety Alert

8/2/2021 4:04 pm — FALLS Risk (TruChart, Admin)

Atd = Attended, DNA = Did Not Attend, Unk = Unknown, Cnl = Canceled

Convert to Multi-Participant Event | Convert to a Non-Participant Event

Calendar(s):

Name	Address	Phone/Fax	Remove
JASON			Remove

Add: Search Calendars...

Location:

Occurrence:

05/31/2023

at 03:15PM

1 Month | 3 Months | 6 Months | 1 Year

☐ Pending time

Duration:

0 Hrs

15 Min

End Time: 5/31/2023 3:30 pm

Recurrences:

None

Appt Reason:

Quick Fill

Eval for improvement & repeat GDS

Event Type:

Encounter(s):

ALPHON, AVA (122333) — Check-In >

Appt Canceled:

☐ No ☒ Yes Reschedule

Quick Fill Reason:

Save

Save & Close

Delete

Close

Last Update by TruChart, Admin: 04/20/2023 3:15 PM

View Change History

End Active Authorizations

ALPHON, AVA (122333) - Authorizations

Benefit Plan:

PACE Benefits

Plan Group:

-- Select --

Case #:

Number...

Effective:

Expiration:

Requested:

Response Due:

Provider Type:

Practitioner

Practitioner:

Practitioner...

☐ Include Inactive Practitioners

Service Class:

Service Class...

CPT® Code:

CPT® Code...

Reporting Type:

All

☐ Adverse Determination Only

Care Manager:

User...

☐ All Responses (9)

☒ Certified In Total (8)

☐ Certified Partial (0)

☐ Modified (0)

☐ No Response (0)

Actions (0)

Create Service Determination Request

<input type="checkbox"/>	Case #	Care Manager	Response	Case Event	Total Units	Provider	NPI	FEIN	Effective	Expiration	CPT® Code	SDR Presented to IDT	Extension Notification Date	Requested IDT Member Approves	Actions
<input type="checkbox"/>	0511-000-008-8601		Certified In Total	Transport Wheelchair (DME...	1				2/16/2023	2/16/2023					Action
<input type="checkbox"/>	0511-000-008-8600		Certified In Total	Cardiology Initial Evaluation...	1				2/16/2023	4/30/2023	99201-99215				Copy as New Generate Authorization Letters Create Revised Request Create Extension Request Create Clinical Review End Authorization Cancel Authorization Mark Service Fulfilled
<input type="checkbox"/>	0511-000-008-8598		Certified In Total	Physical Therapy Evaluatio...	1				2/16/2023	2/16/2023					
<input type="checkbox"/>	0511-000-008-8350		Certified In Total	Manual Wheelchair (DME >...	1				11/23/2021	12/22/2021	13254	11/23/2021	11/23/2021	Yes	

Discontinue Active Meds

TruChart
QA PAGE

Worklist 1

Enrollment

ADAMS, ALICE (TEST2DNW 59... 0 alerts 0 allergies 1 adv dir HIE

6/15/2023 at 9:11 am Documentation TruChart, Admin Documentation

Hospitalization Review

Medication Management

4/20/2023 at 10:33 am TruChart, Admin

4/20/2023 at 8:41 am IDT Care Plan Meeting TruChart, Admin

Snap LIFEplan Notes Labs History Admits Authorizati

Allergies

A/I	Allergy
-----	---------

Active Medications

Mg	Manage	Medication	Dosage	Sig	Notes	Ordered
M	DC	20 DRAM CAPS - ONCE A DAY **NI		SEND 100 CAPS		4/1/17
M	nc (No Change)					4/2/17
M	nc (No Change) Reviewed					3/30/17
M	Change Rx to: HOA (Hold on Administration) HOD (Hold on Dispensing) (Can't Renew - No Quantity Unit,Not Compound Drug or Supplies) DC (Discontinue)					3/31/17

Discontinue Active Orders

Orders				
Mg	Staff	Order	Specialty	Order Details
Usg	Staff	Pulmonary Medicine Consult	Pulmonary Disease	No Details Specified
Usg	Staff	jason panel test	Dental	No Details Specified
Usg	Staff	Home Care Help	Level 3: Home Health Care Aide	No Details Specified
Usg	Staff	External Labs	Outpatient Lab	No Details Specified
Usg	Staff	Bath/Shower Chair	Other	No Details Specified
Usg	Staff	Home Health Aide Per Hour	Level 3	No Details Specified
M	Staff	<u>Cardiology Initial Evaluation</u>	Cardiol	
M	Staff	eyeglasses	Vision	
M	Staff	Ambulance-Non-Emergency	Non-Er	
M	Staff	Optometry Initial Evaluation	Optom	
M	Staff	Cardiology Initial Evaluation	Cardiol	
M	Staff	Manual Wheelchair	Chairs	
M	Staff	Ambulance-Non-Emergency	Non-Er	

Order Actions

Current Status:

Active

Action:

Discontinue

Date:

06/15/2023

Reason:

Quick Fill

pt expired

Notification Inbox:

No Notification

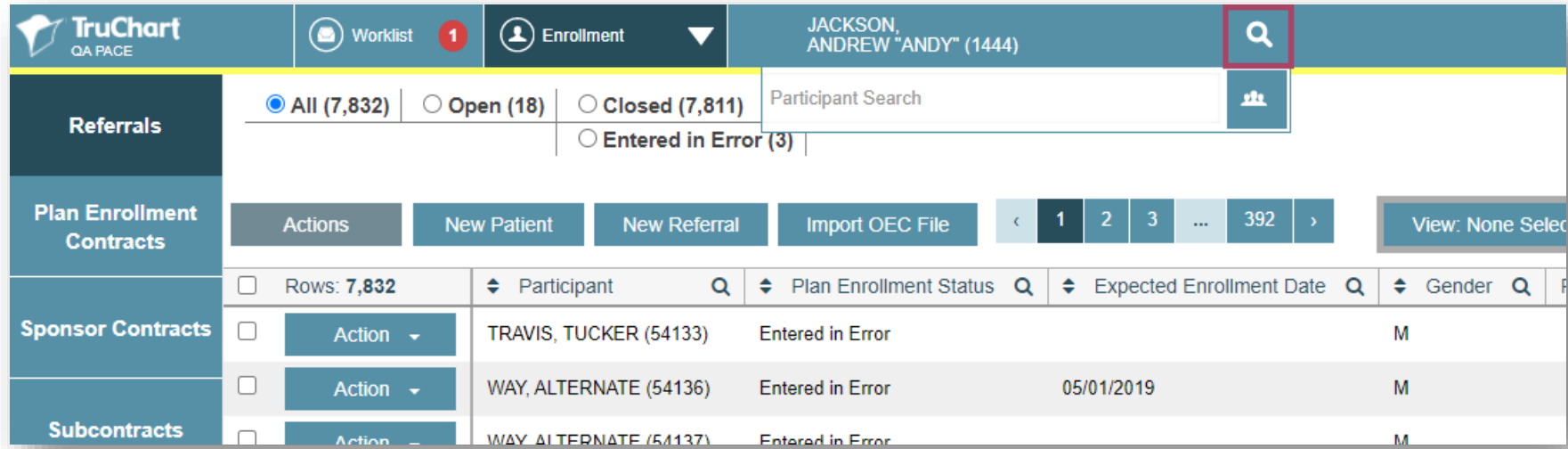
Save

Cancel



Terminating the Contracts

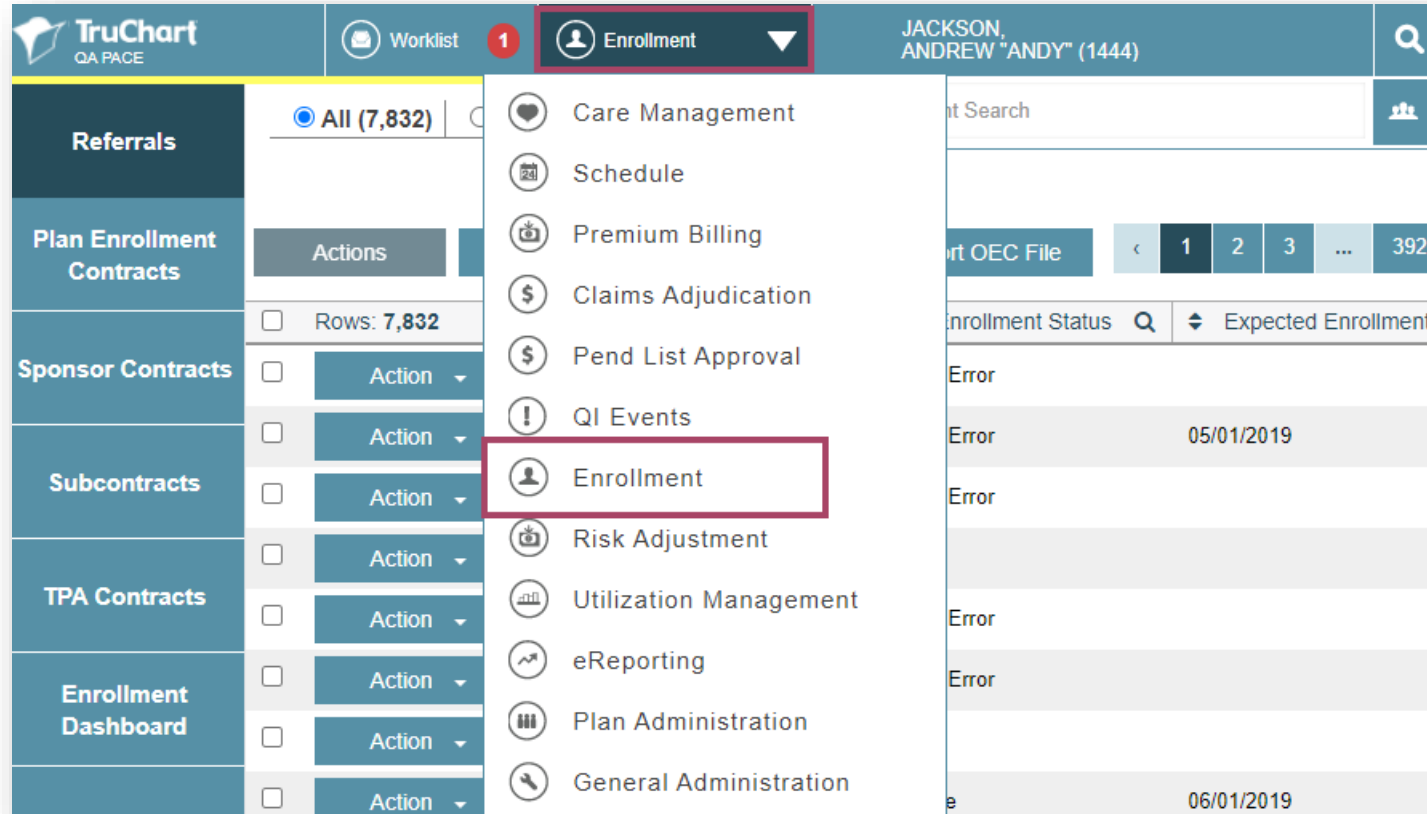
Terminating the Contracts



The screenshot displays the TruChart QA PACE interface. At the top, the 'Enrollment' tab is selected, showing a patient named JACKSON, ANDREW "ANDY" (1444). A search icon is highlighted with a red box. Below the header, a sidebar on the left contains navigation options: Referrals, Plan Enrollment Contracts, Sponsor Contracts, and Subcontracts. The main area shows a filter bar with 'All (7,832)' selected, and a 'Participant Search' field. Below this is a table of contracts with columns for Actions, Participant, Plan Enrollment Status, Expected Enrollment Date, and Gender. The table lists three contracts, all marked as 'Entered in Error'.

Actions	Participant	Plan Enrollment Status	Expected Enrollment Date	Gender
<input type="checkbox"/> Action	TRAVIS, TUCKER (54133)	Entered in Error		M
<input type="checkbox"/> Action	WAY, ALTERNATE (54136)	Entered in Error	05/01/2019	M
<input type="checkbox"/> Action	WAY, ALTERNATE (54137)	Entered in Error		M

Terminating the Contracts



The screenshot displays the TruChart QA PACE interface. The top navigation bar includes the TruChart logo, a Worklist icon with a red notification badge, and a dropdown menu currently set to 'Enrollment'. The user profile 'JACKSON, ANDREW "ANDY" (1444)' is visible on the right. The left sidebar contains a list of menu items: Referrals, Plan Enrollment Contracts, Sponsor Contracts, Subcontracts, TPA Contracts, Enrollment Dashboard, and an unlabeled item at the bottom. The 'Enrollment' dropdown menu is open, showing a list of options: Care Management, Schedule, Premium Billing, Claims Adjudication, Pend List Approval, QI Events, Enrollment (highlighted with a red box), Risk Adjustment, Utilization Management, eReporting, Plan Administration, and General Administration. The main content area shows a table with columns for 'Enrollment Status' and 'Expected Enrollment'. The table contains several rows, some of which are marked as 'Error'.

Enrollment Status	Expected Enrollment
Error	
Error	05/01/2019
Error	
Error	
Error	
Error	
	06/01/2019

Terminate the Contracts

TruChart
QA FACE

Worklist 1

Enrollment

JACKSON, ANDREW "ANDY" (1444)

Participant Search

Referrals

Plan Enrollment Contracts

Sponsor Contracts

Subcontracts

TPA Contracts

Enrollment Dashboard

Reports

CFCO CU File Audit

OSDS Plan Member Report

All (7,832) Open (18) Closed (7,811) Entered in Error (3)

Participant Search

Actions

New Patient

New Referral

Import OEC File

< 1 2 3 ... 392 >


View: None Selected

<input type="checkbox"/>	Rows: 7,832	Participant	Plan Enrollment Status	Expected Enrollment Date	Gender	Race
<input type="checkbox"/>	Action	TRAVIS, TUCKER (54133)	Entered in Error		M	
<input type="checkbox"/>	Action	WAY, ALTERNATE (54136)	Entered in Error	05/01/2019	M	0
<input type="checkbox"/>	Action	WAY, ALTERNATE (54137)	Entered in Error		M	
<input type="checkbox"/>	Action	ADAMS, JOHN (957)	Approved		M	
<input type="checkbox"/>	Action	TRAVIS, TUCKER (54431)	Entered in Error		M	
<input type="checkbox"/>	Action	GARY, OPTIC (54471)	Entered in Error		M	
<input type="checkbox"/>	Action	DE, FAR (54704)	Approved		M	
<input type="checkbox"/>	Action	KIRINGTON, TEST (54522)	Prospective	06/01/2019	M	0
<input type="checkbox"/>	Action	BURNE, TROY (2030)	Approved		M	
<input type="checkbox"/>	Action	GAMER, TEST (55288)	Entered in Error		M	
<input type="checkbox"/>	Action	GAMERRR, TESTTT (55295)	Entered in Error		M	
<input type="checkbox"/>	Action	GAMES, TESTTT (55298)	Entered in Error		M	
<input type="checkbox"/>	Action	GAB, TESTER (55293)	Entered in Error		M	




Inactivating the Medical Record

Inactivating the Medical Record


 **TruChart**
QA PACE

Worklist 1

Enrollment ▼


 **SAND, CASTLE (87171)**


0 alerts 0 allergies 0 adv dir **HIE** ▼





SAND, CASTLE (87171)

Participant Demographics


 Info


 Schedule

 Care Circle

 Print

Encounters ▼

 New Encounter

History — All (0) 

Snap

LIFEplan

Notes

Labs

History

Admits

Authorizations

Medications

Orders

Requisitions

CRIs


Allergies

Immunizations

PHS

Workflows

More...

 quick views of this participant

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45

Inactivate the Medical Record

SAND, CASTLE (87171) - Info

Demographics

Show:

☒ Latest Communication Preference Request

☐ All

Actions (0) ▾

☐

Change Request ▾

Request From ▾

Request Date ▾

Fulfilled Date

Medical Record

Status: ☐ Lead ☒ Active ☐ Inactive

Refer Participant to Home Care Program

Demographic Lockdown: ☐ Locked ☒ Unlocked

Referral Source:

Other

☐ Include Inactive

Referral Source Type : None

Address: City, State, Zip Code:

Secondary Referral Source:

Secondary Referral Source...

☐ Include Inactive

Referral Date:

mm/dd/yyyy

Expected Enrollment Date:

mm/dd/yyyy

Default Pharmacy Delivery Location: ▾

Medical Administration Record (MAR):

None ▾

Next Cycle Fill Date: Cycle date cannot be calculated at this time

Days Until Next Cycle: Cycle date cannot be calculated at this time

Demo





Q&A



Thank You

