Referral, Enrollment, and Disenrollment

09/27/2023

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Agenda

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- **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

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Referral

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Creating a New Heath Record

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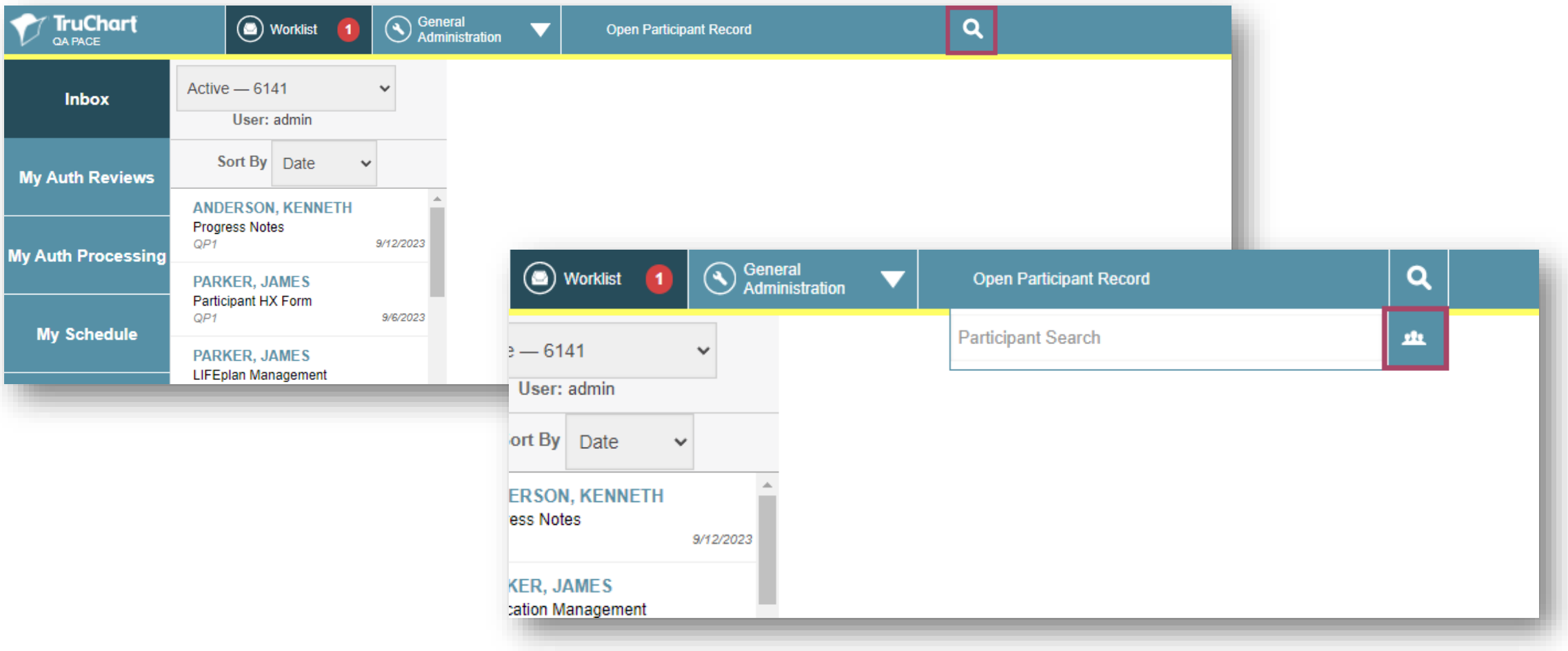
Creating a New Health Record



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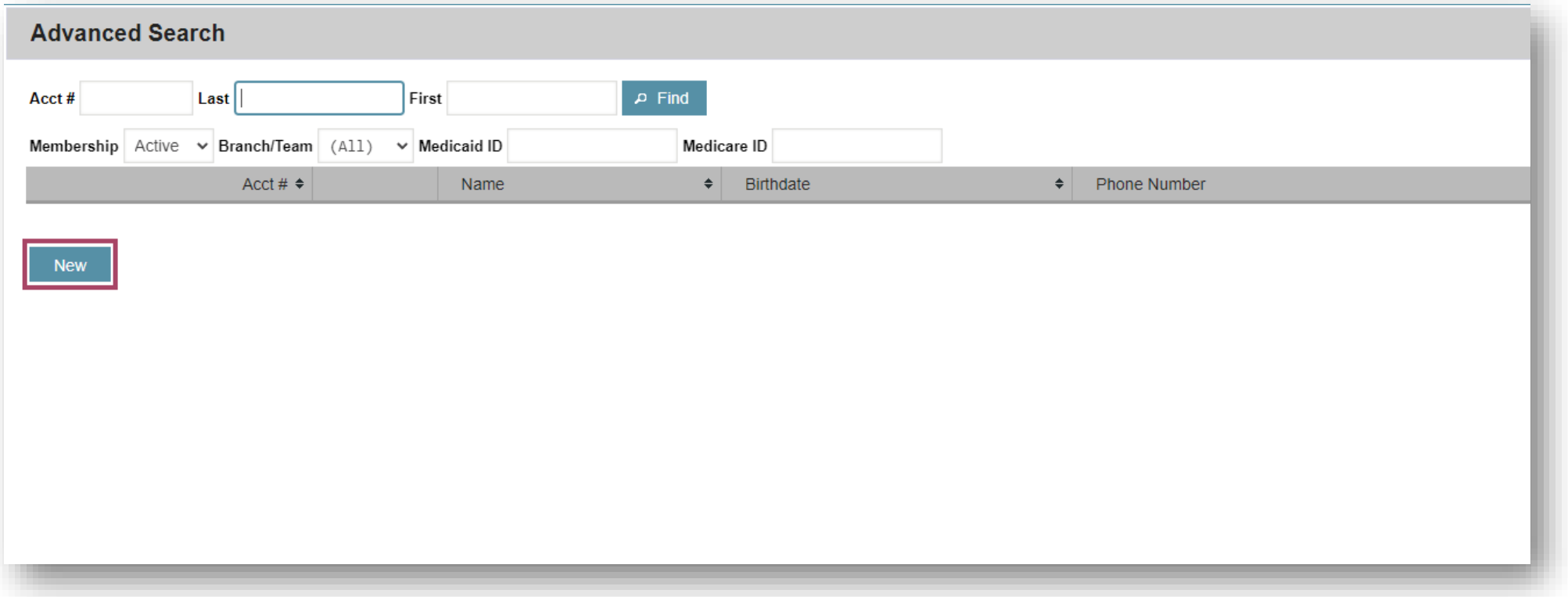
Creating a New Health Record



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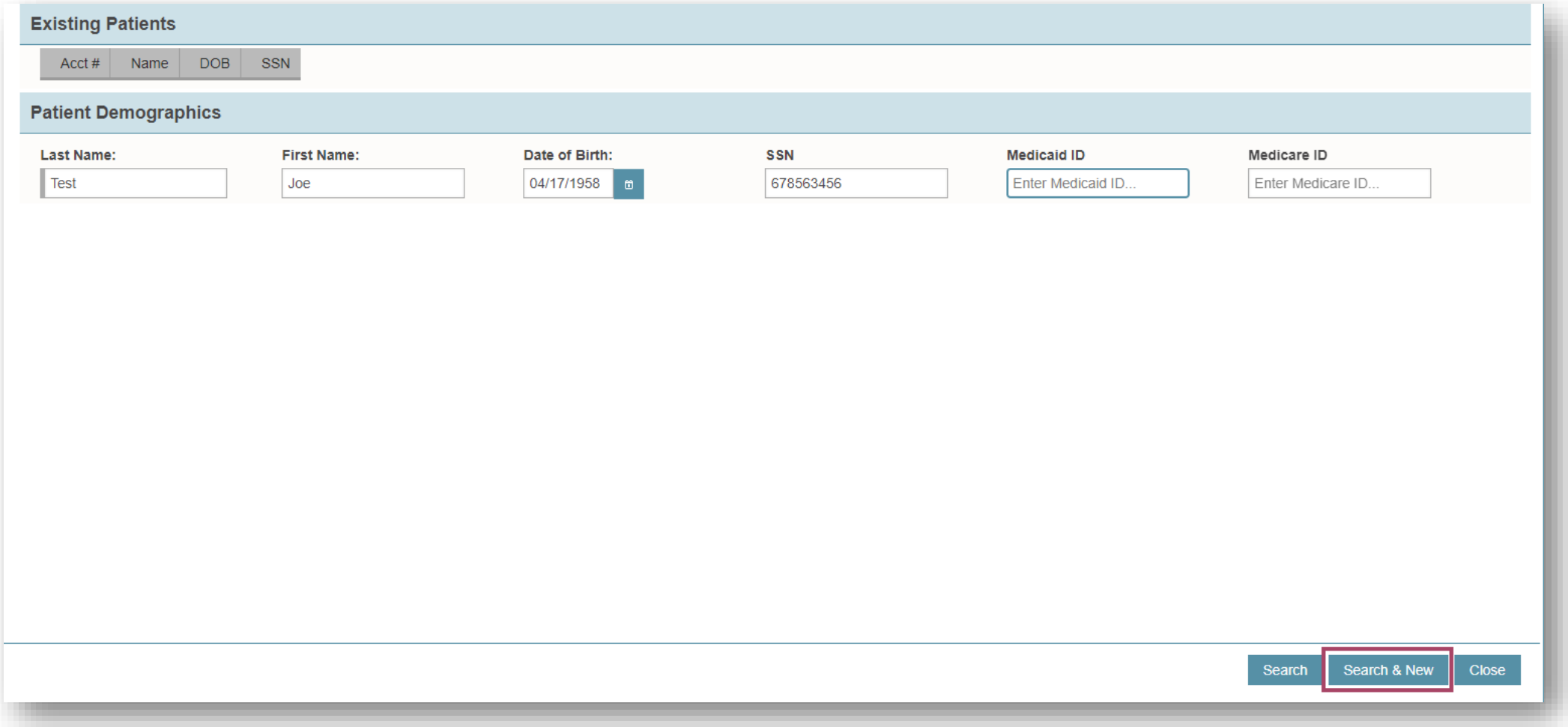
Creating a New Health Record



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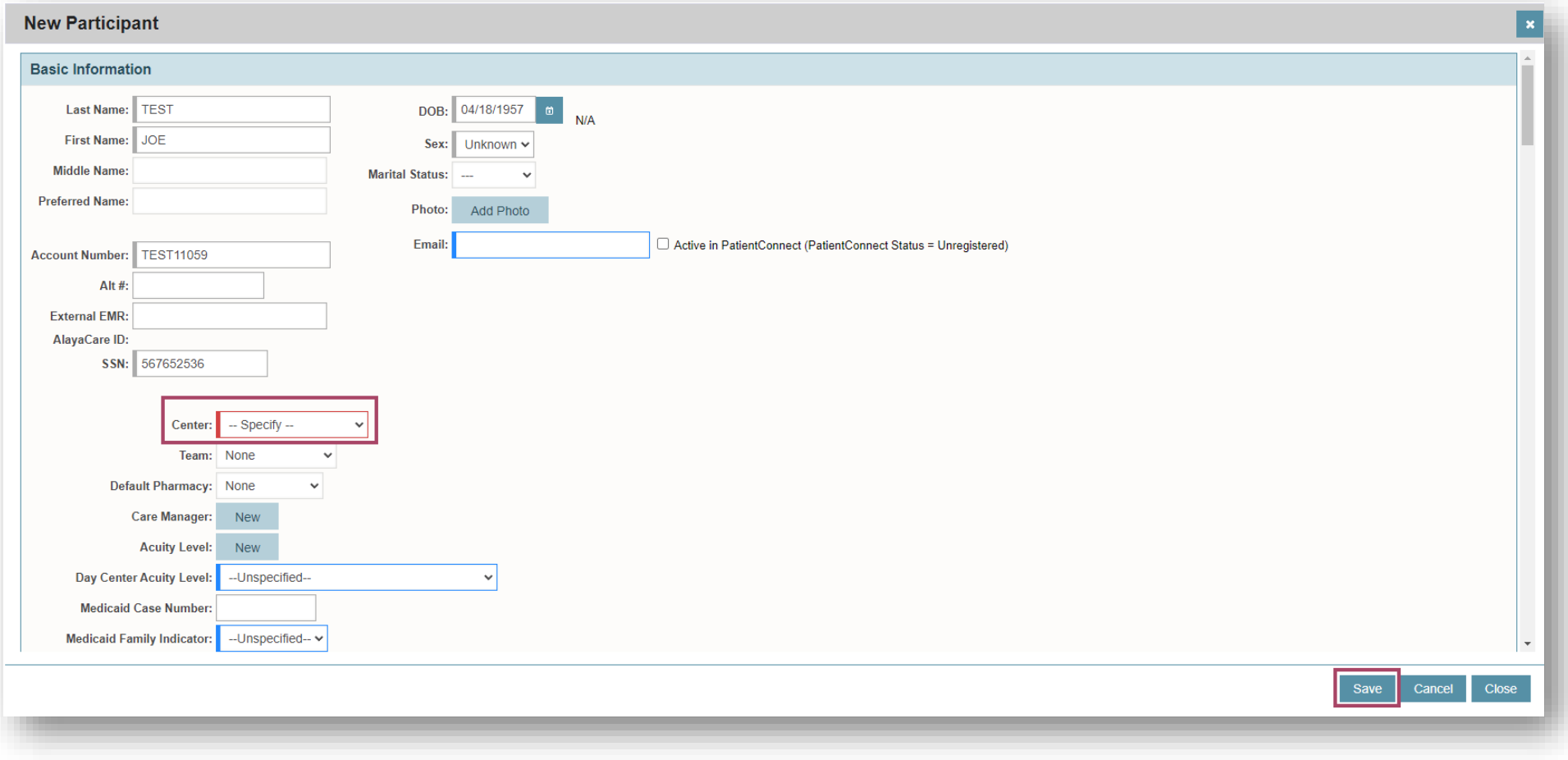
Creating a New Health Record



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Creating a New Health Record

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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.

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Demo

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Adding a New Referral

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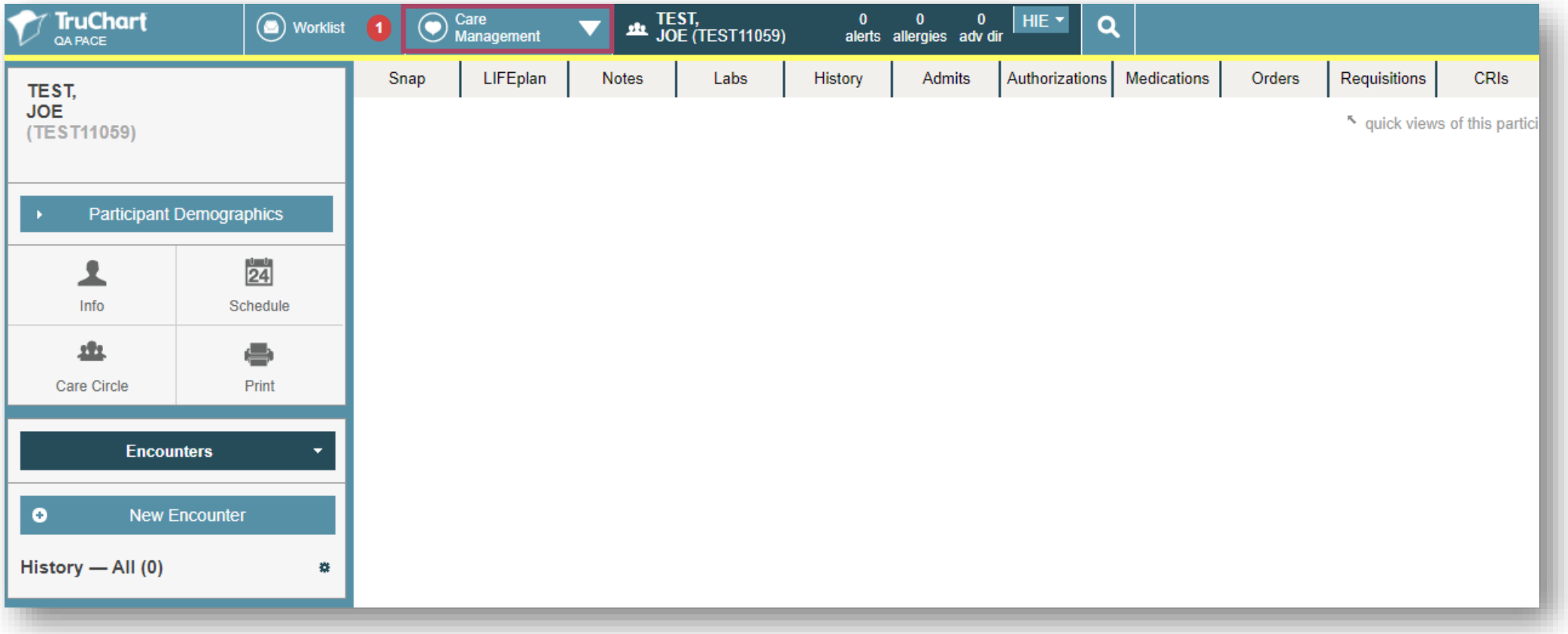

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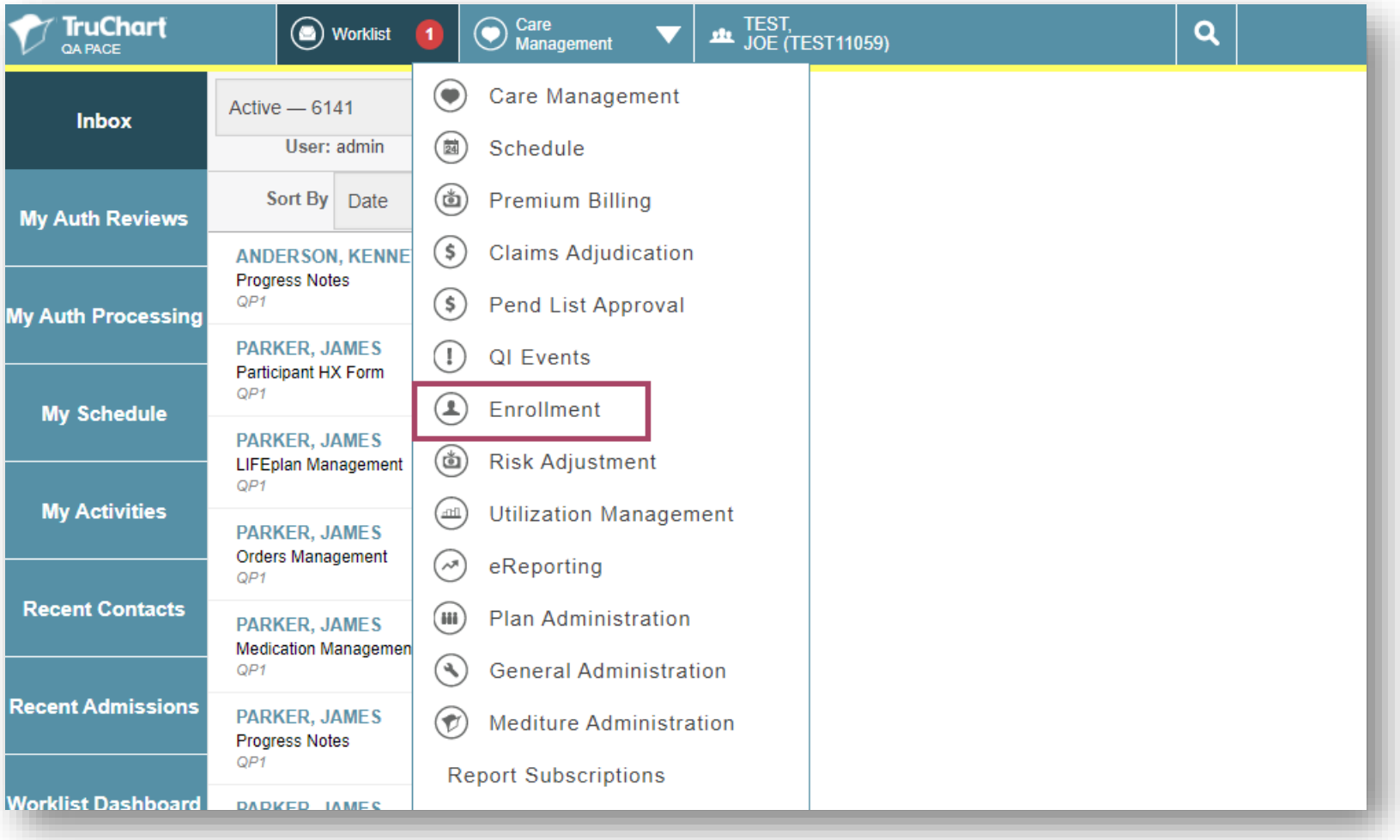

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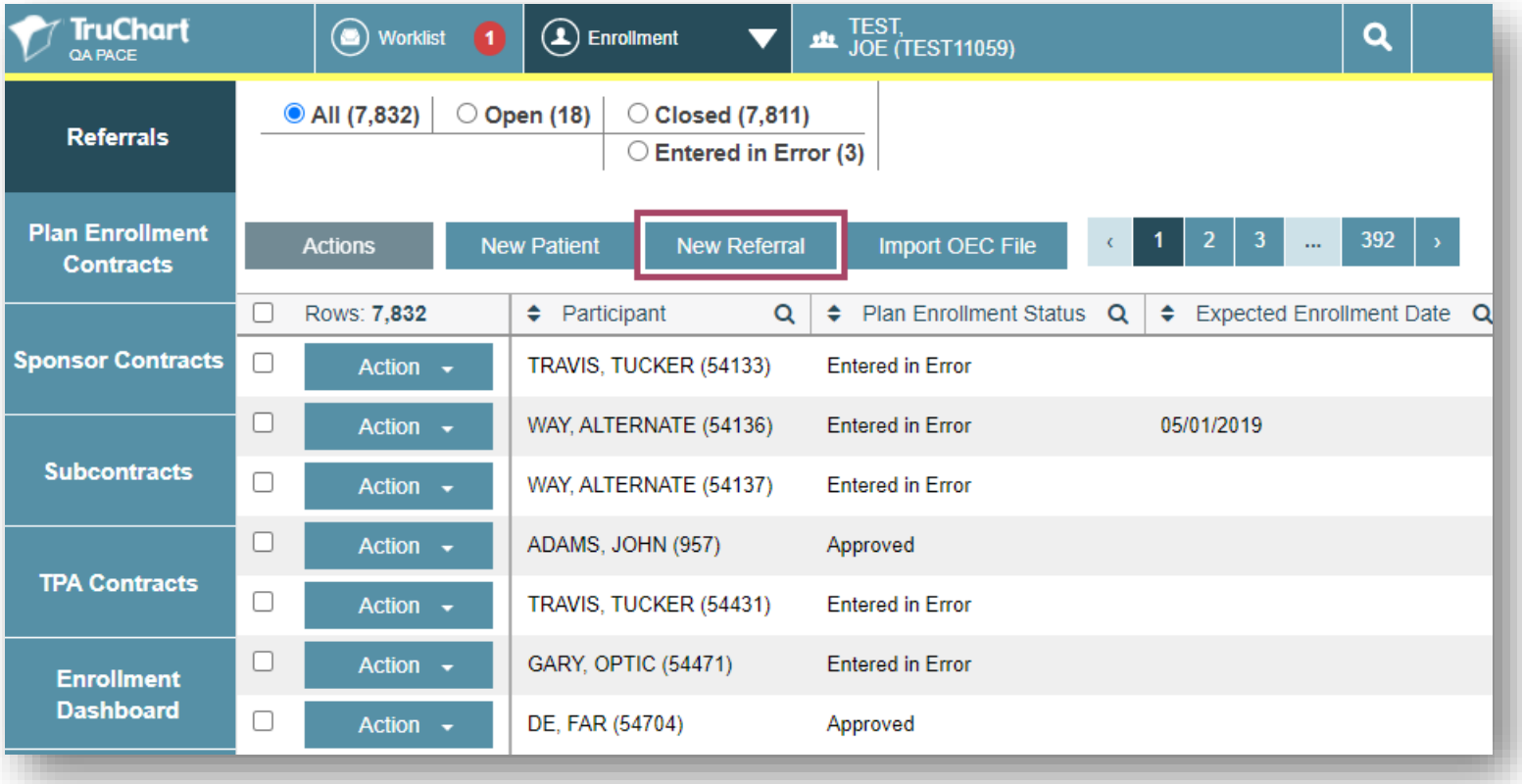

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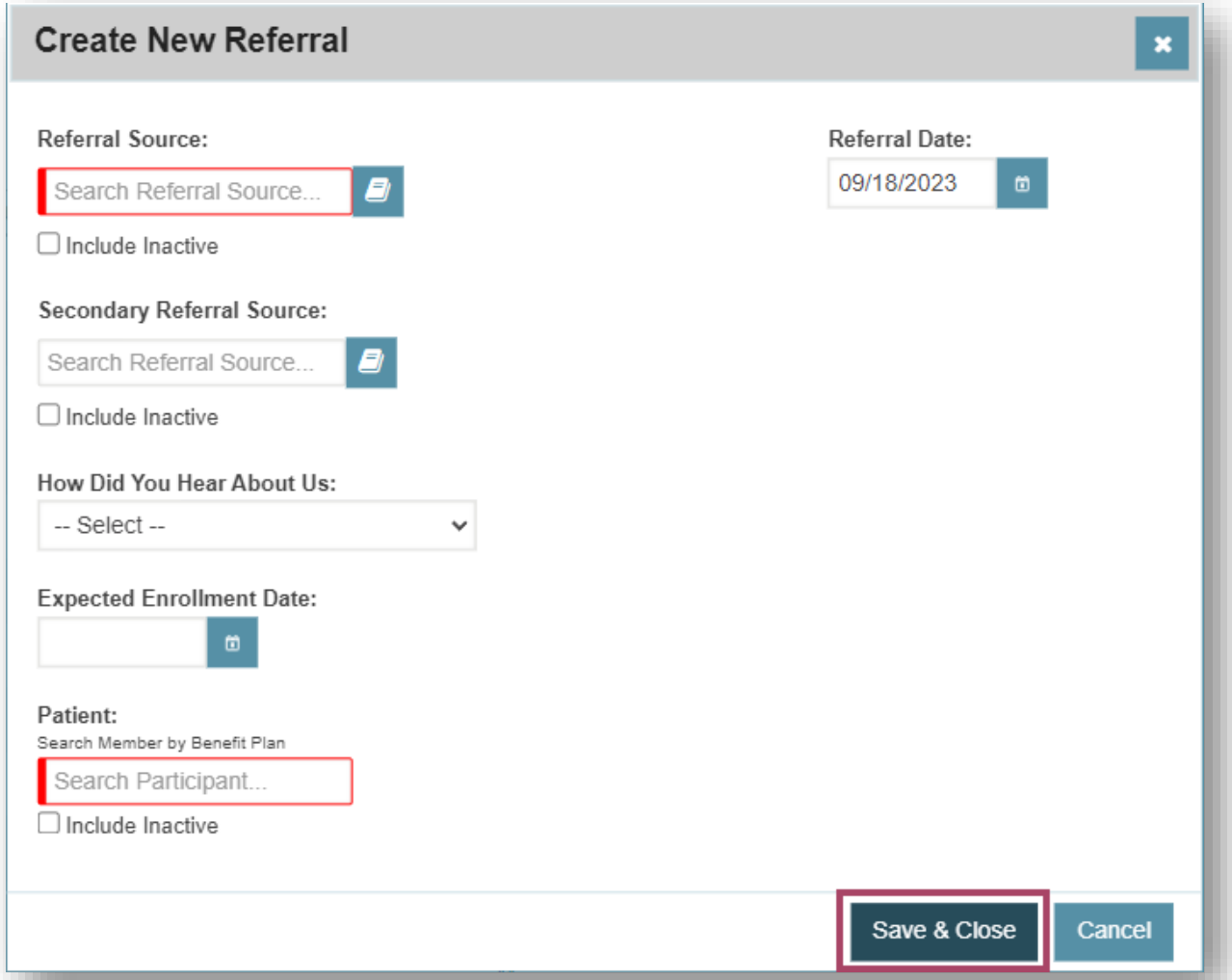

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Action Items

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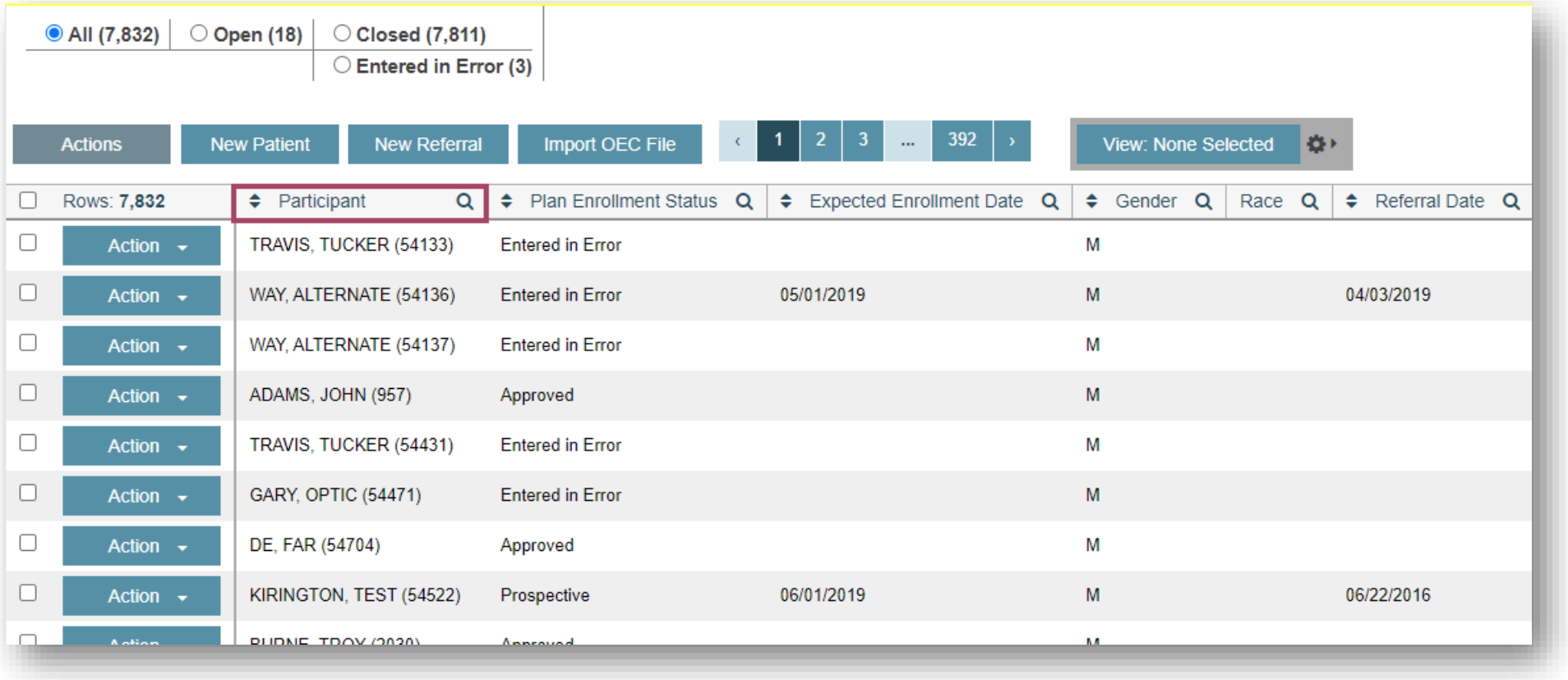
Action Items



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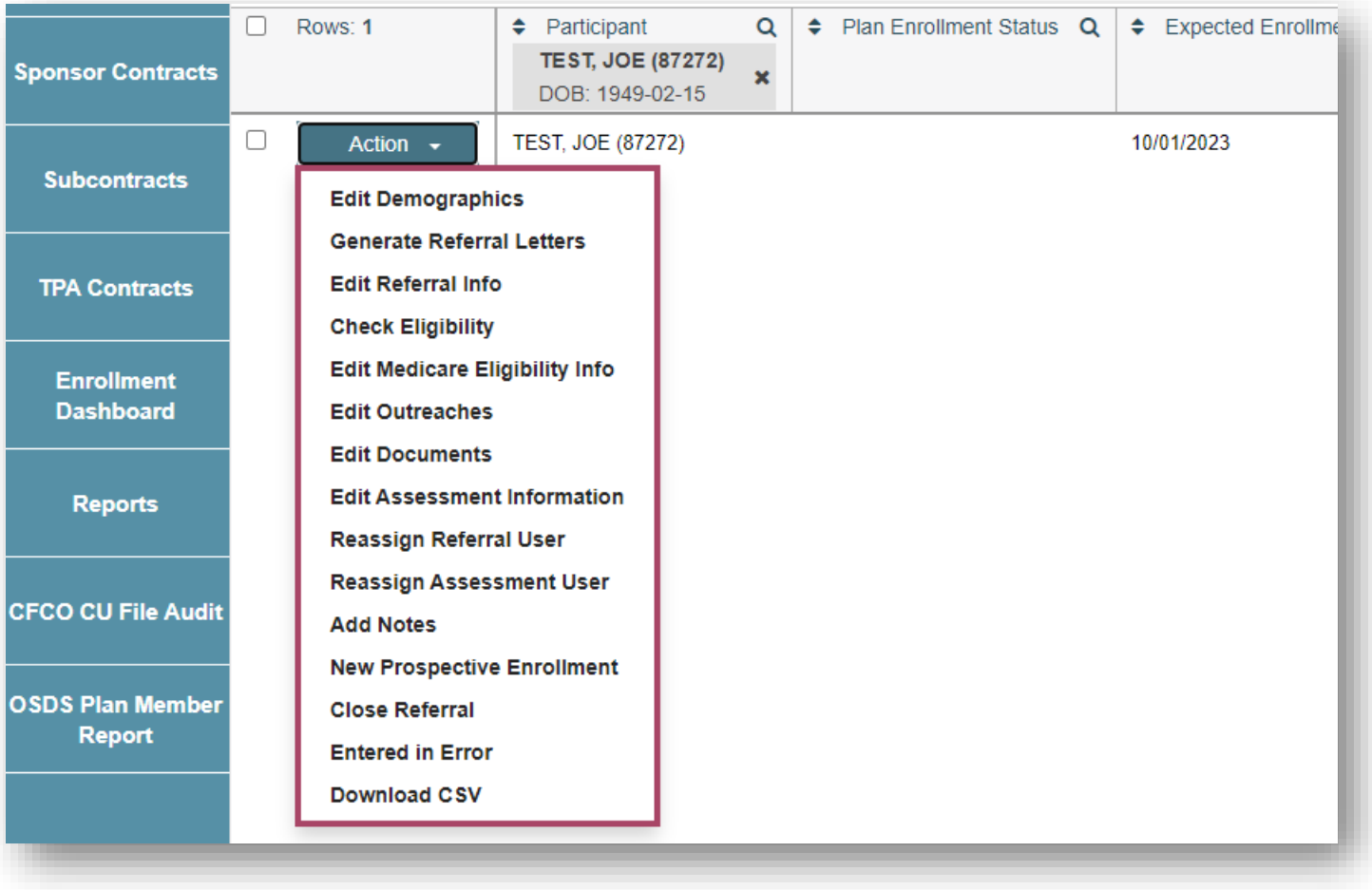
Action Items



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Closing the Referral

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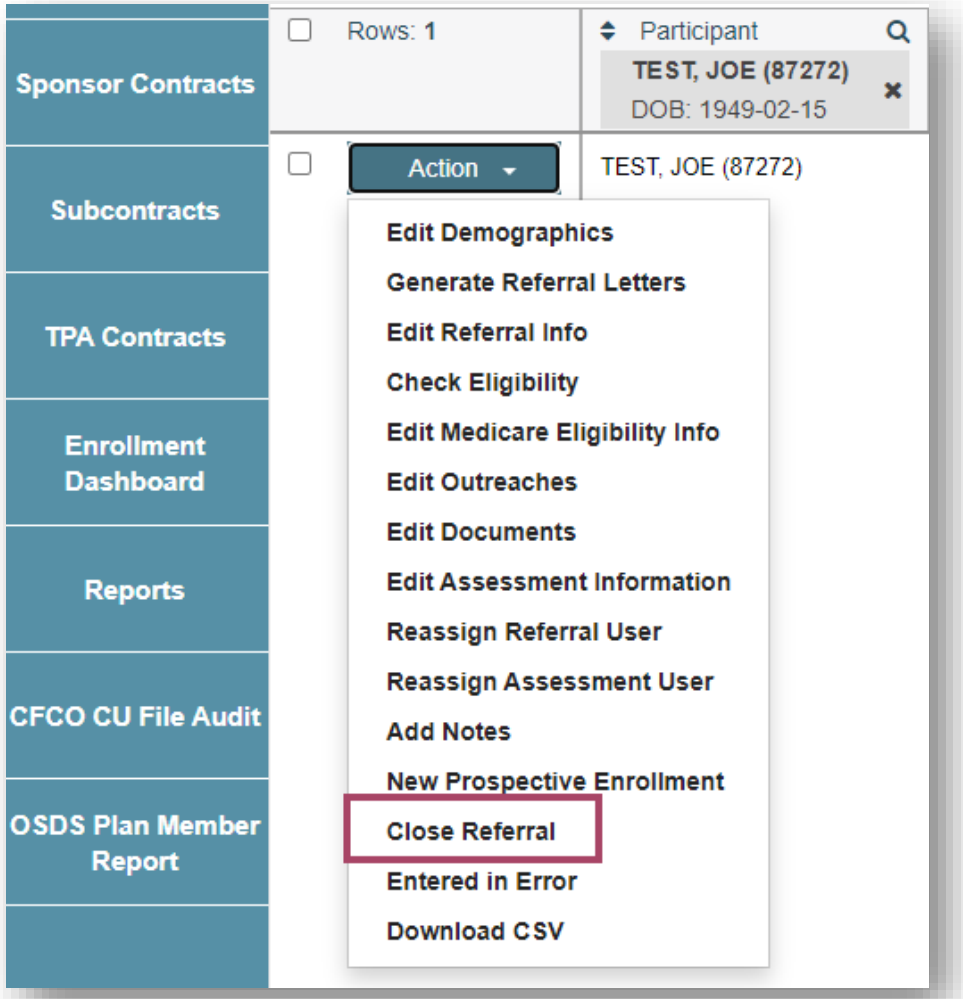
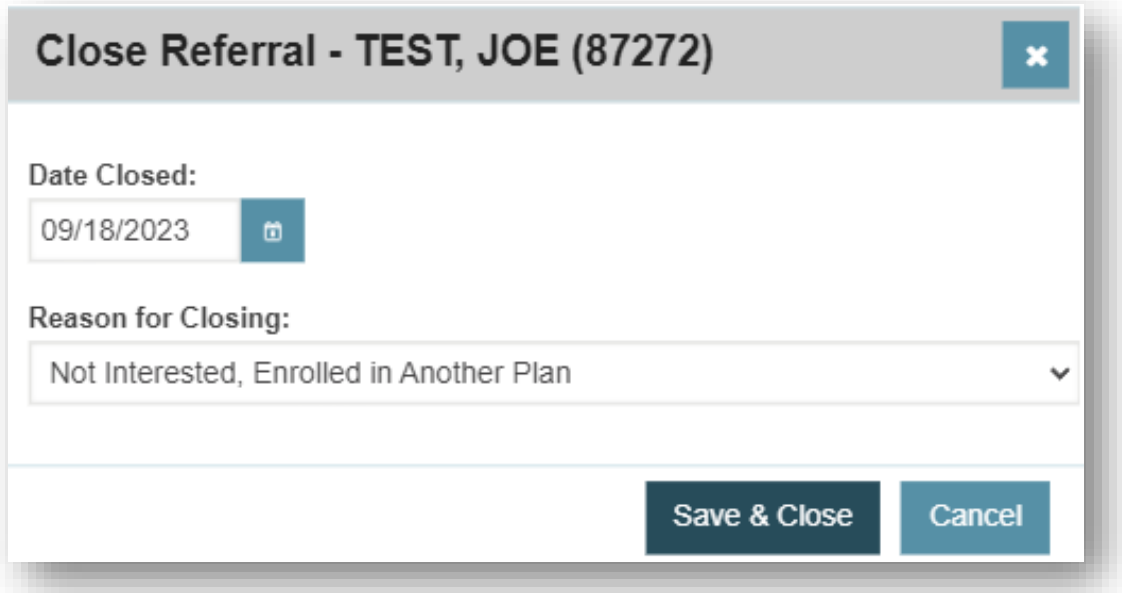
Closing the Referral





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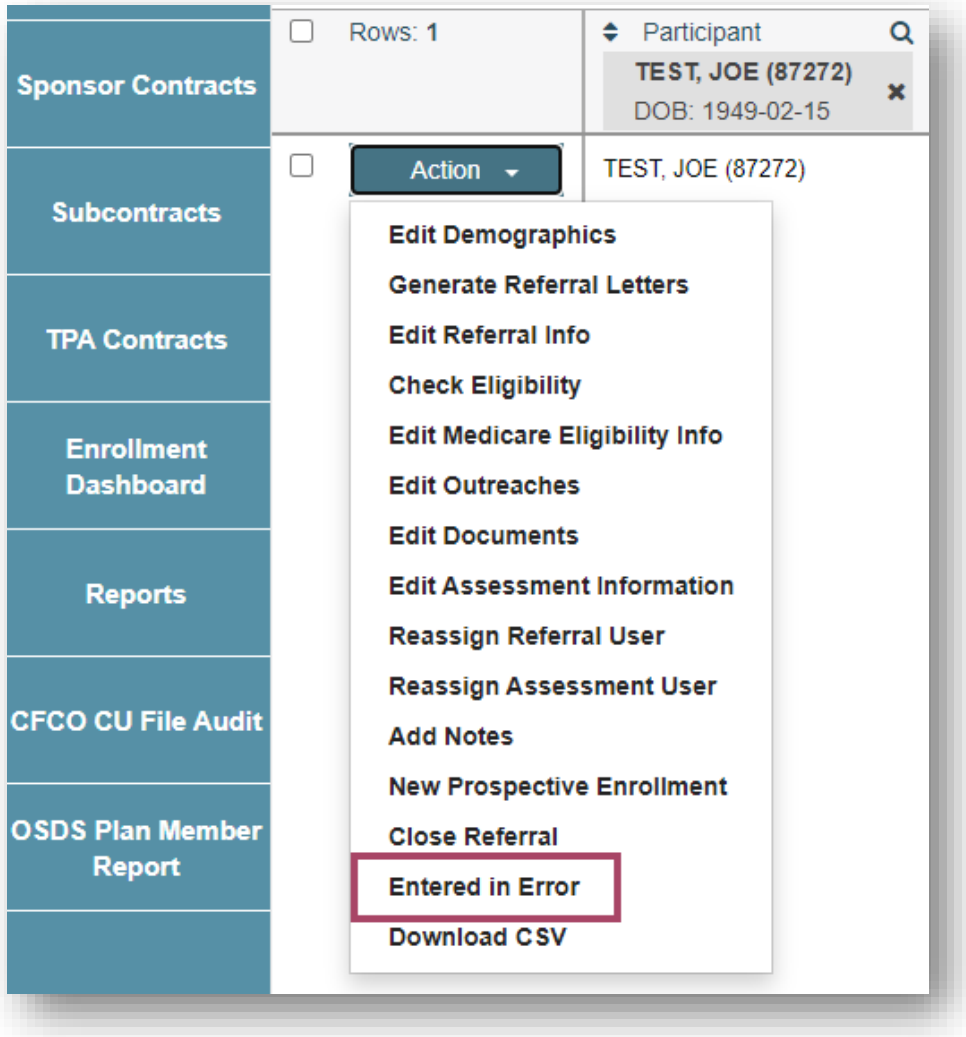
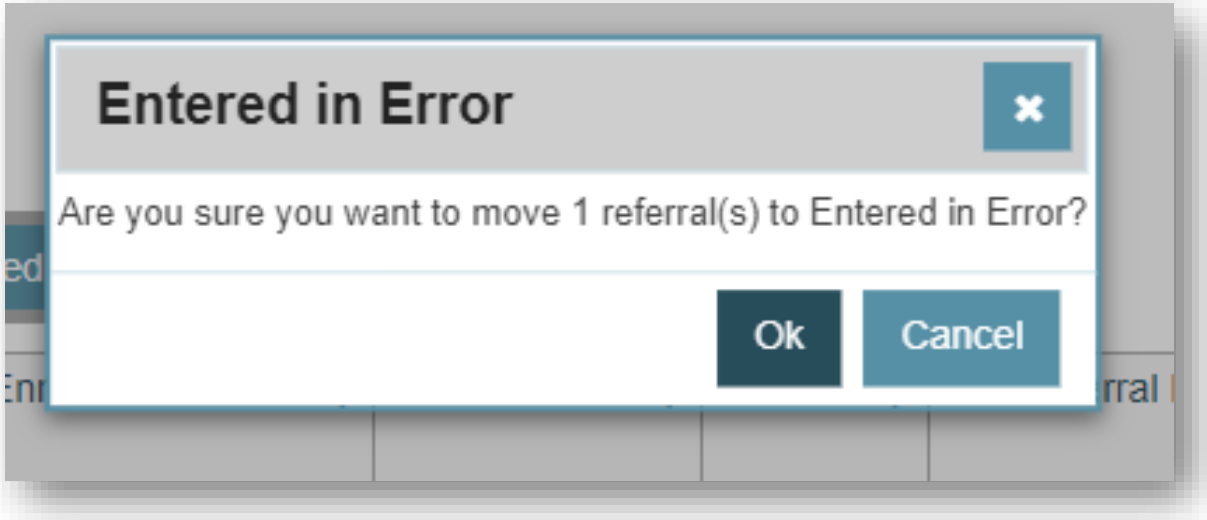
Entered in Error





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Enrollment

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Enrollment Workflow

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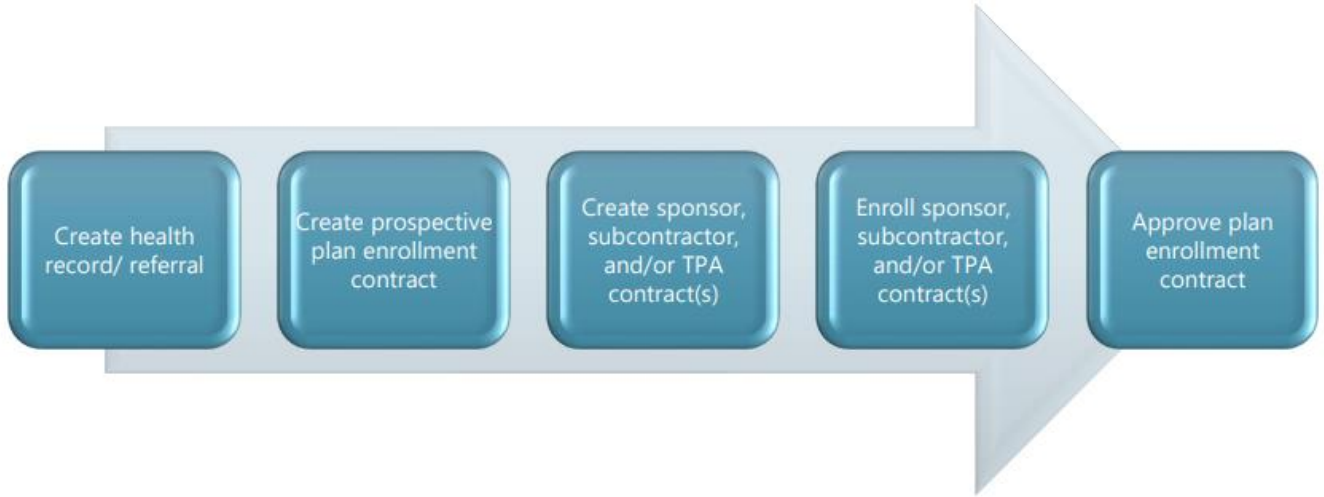
Enrollment Workflow

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:



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New Prospective Enrollment

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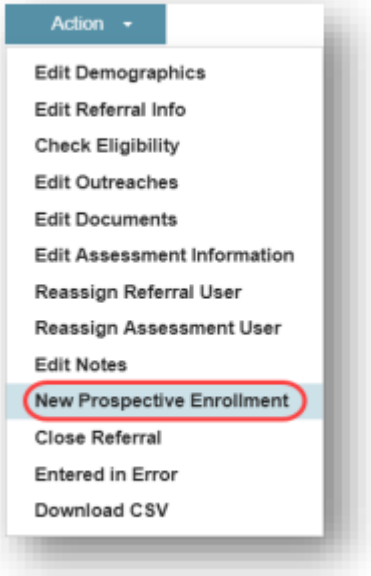
New Prospective Enrollment

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.



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Plan Enrollment Contract

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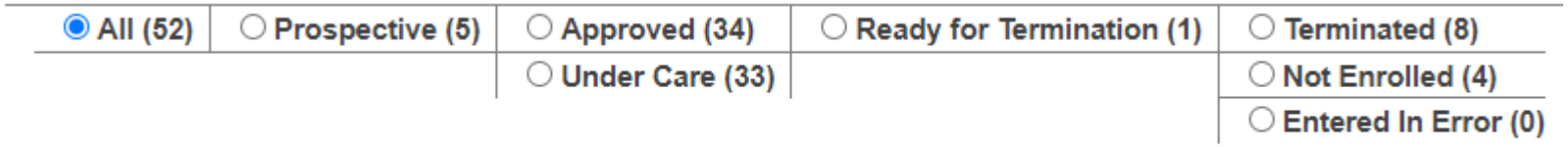
Plan Enrollment Contract

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



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Sponsor and TPA Contracts

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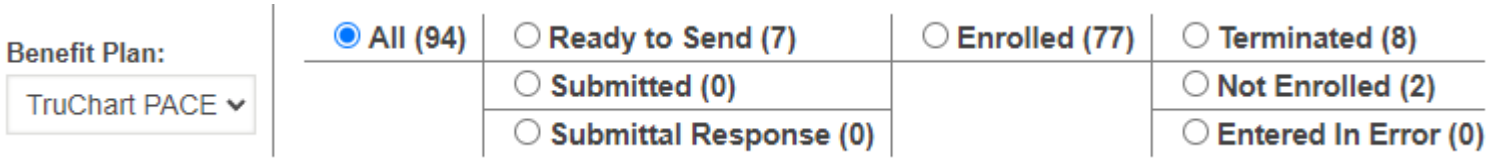
Sponsor Contracts/TPA Contracts

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



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Enrollment Dashboard and Reporting

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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

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Disenrollment

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Cleaning the Chart

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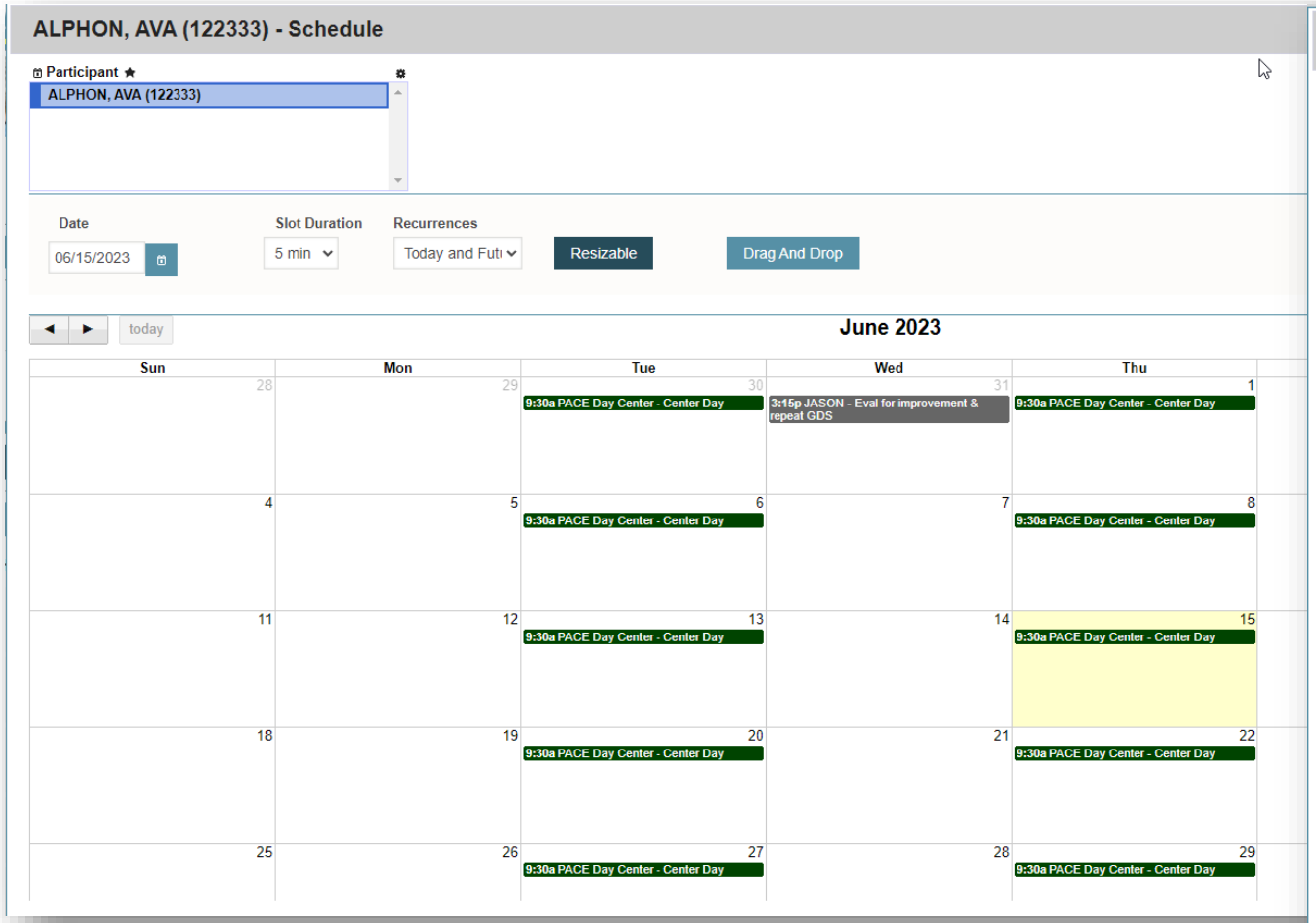
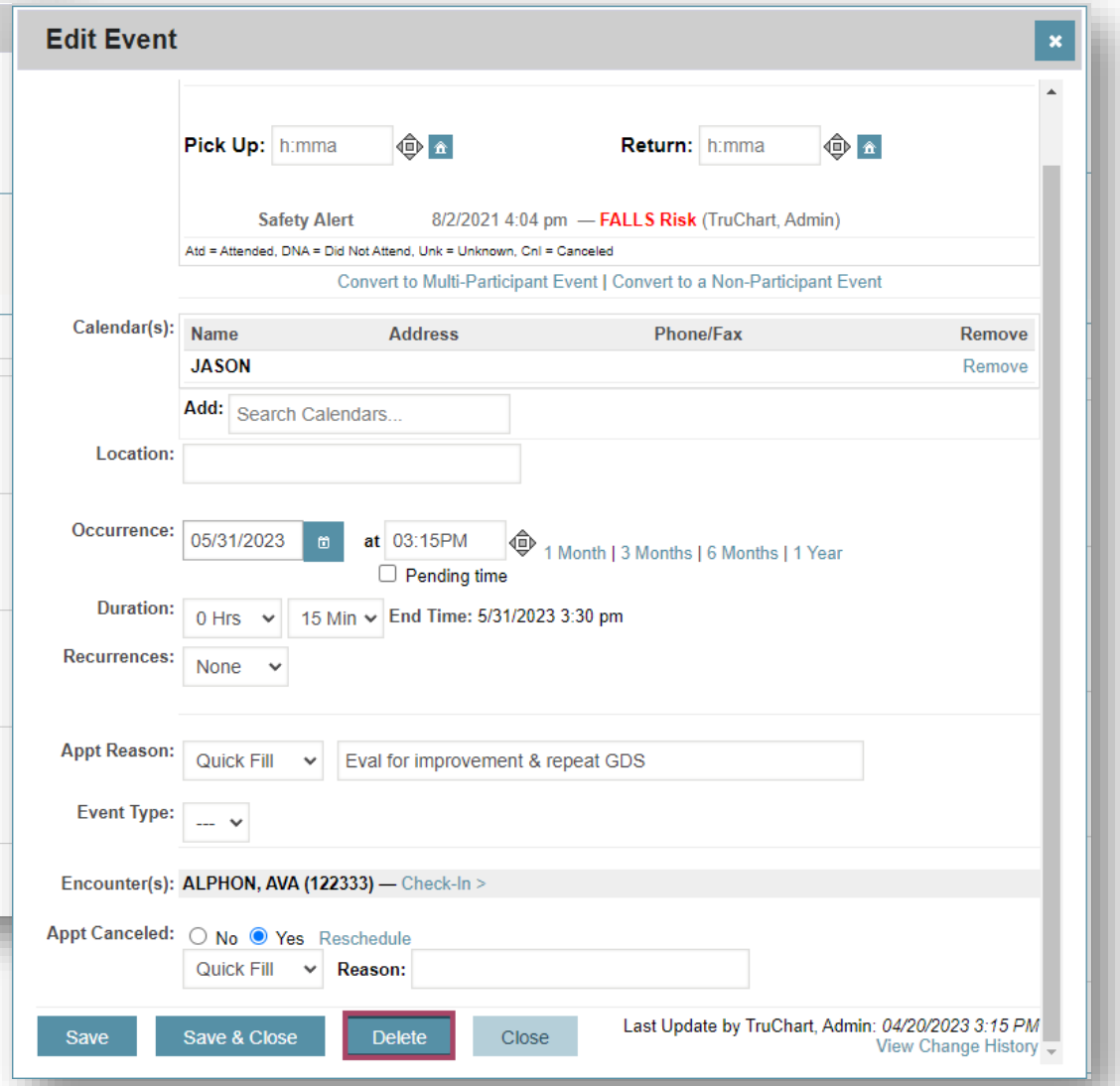
Remove Future Appointments





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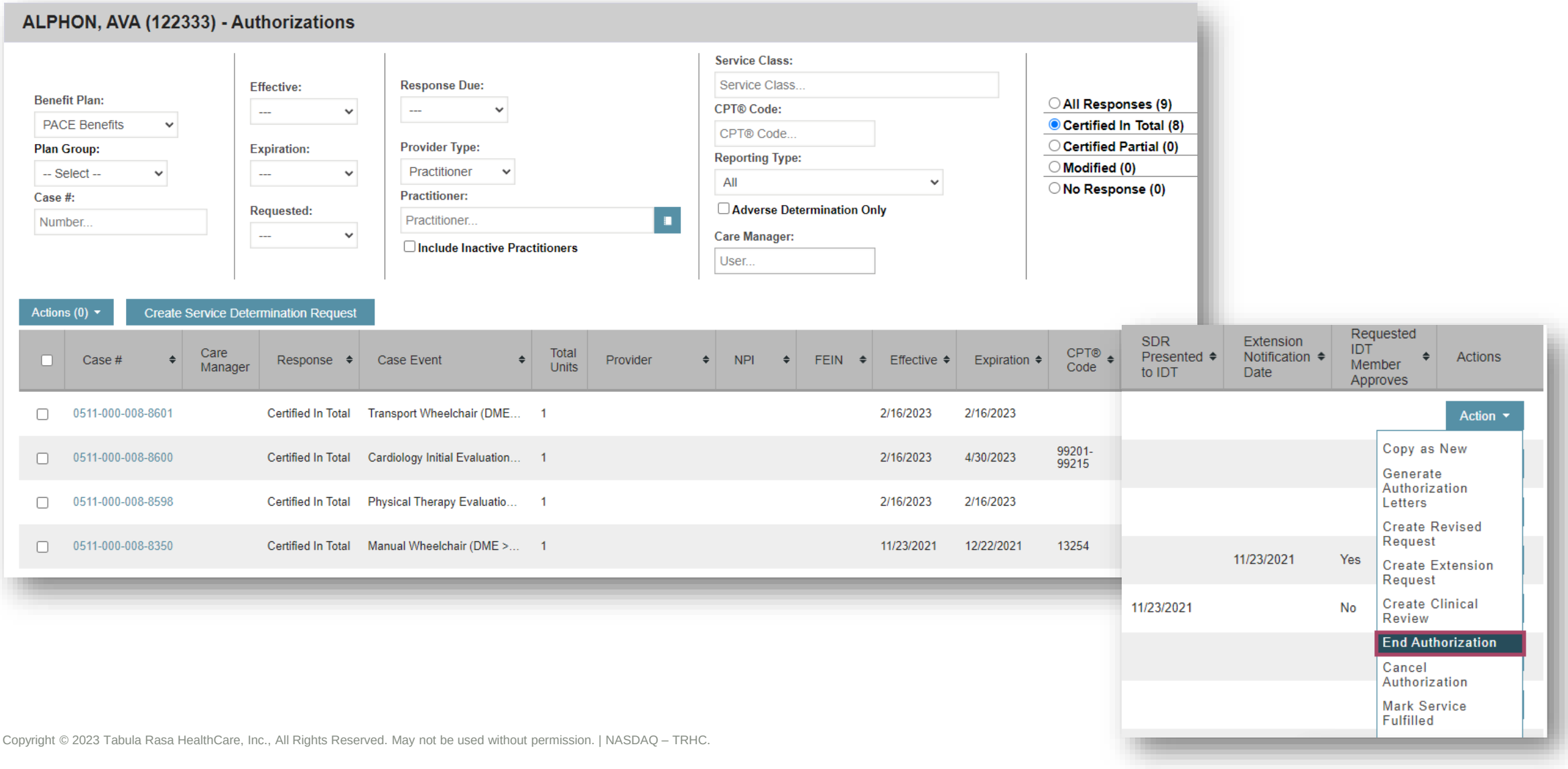
End Active Authorizations



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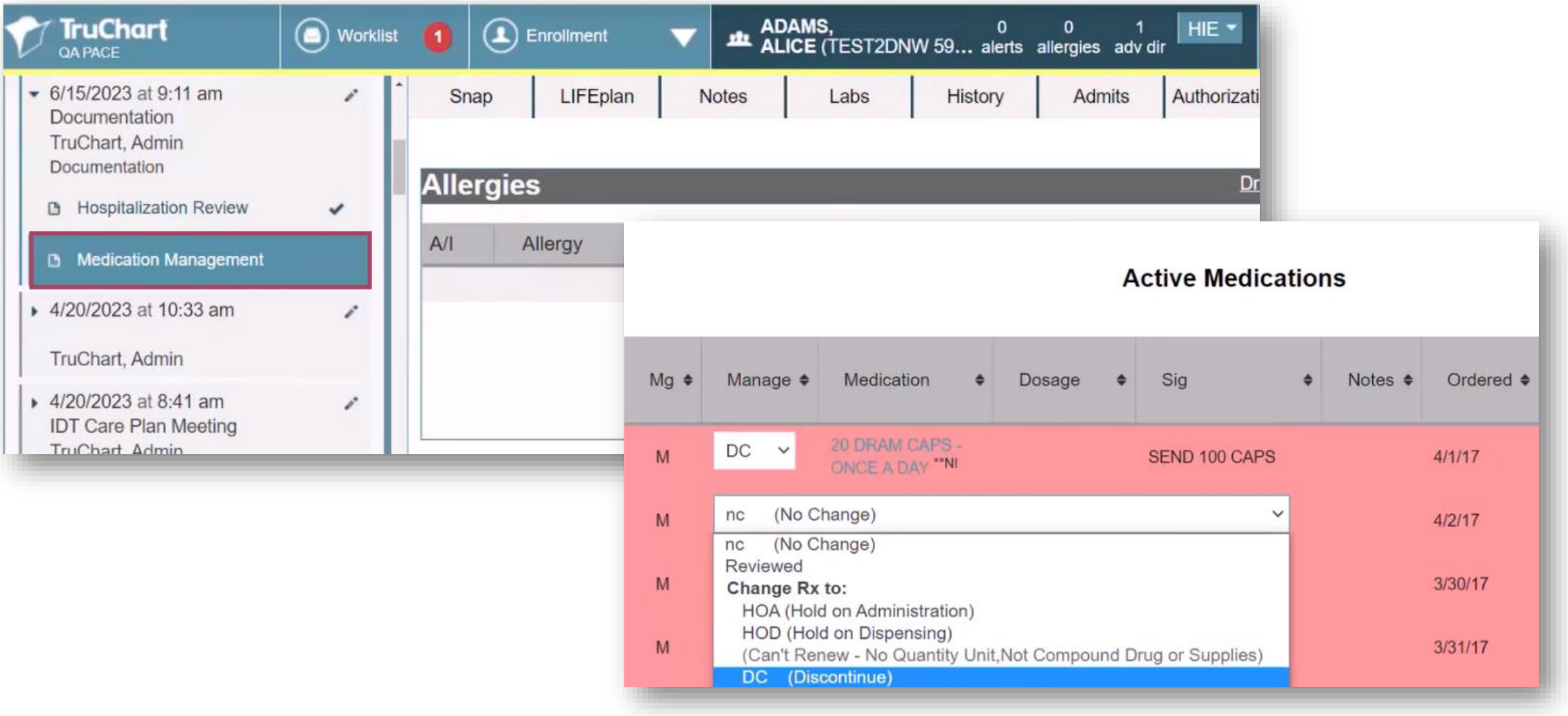
Discontinue Active Meds



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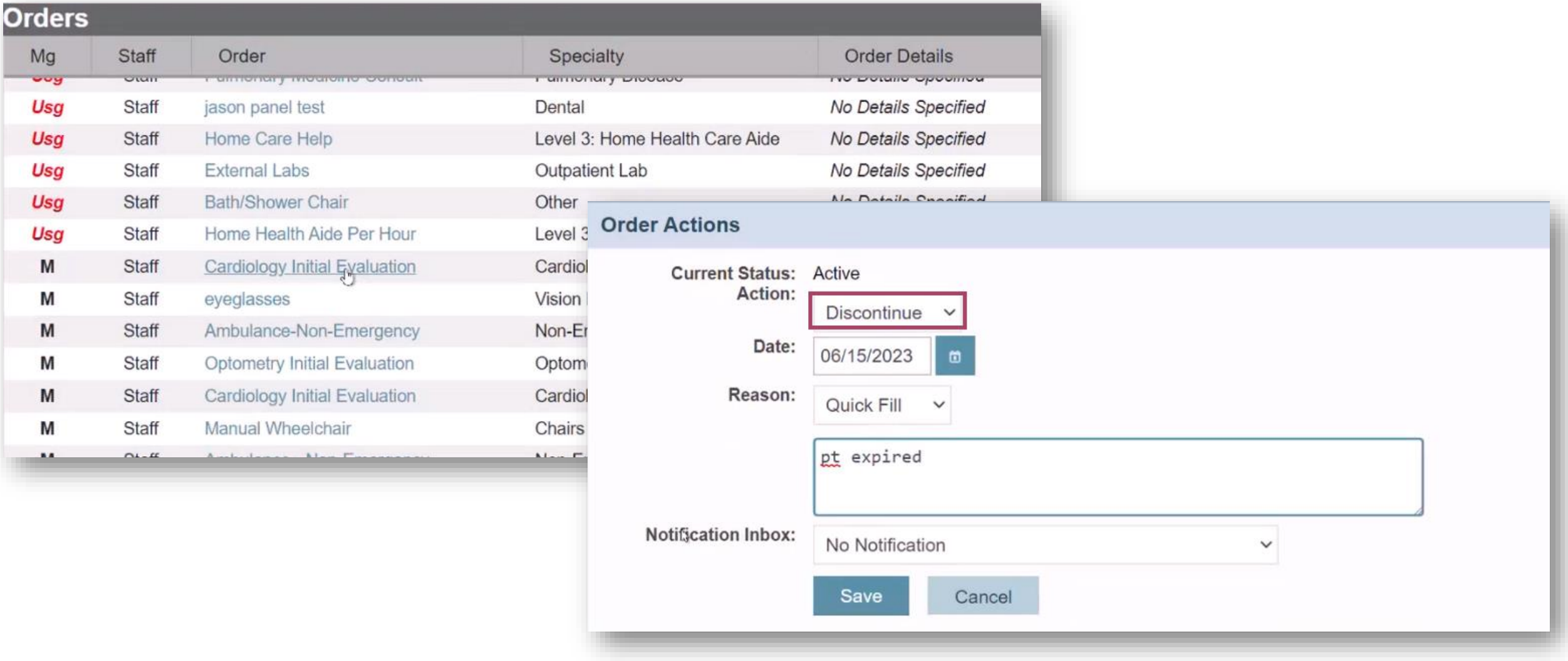
Discontinue Active Orders



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Terminating the Contracts

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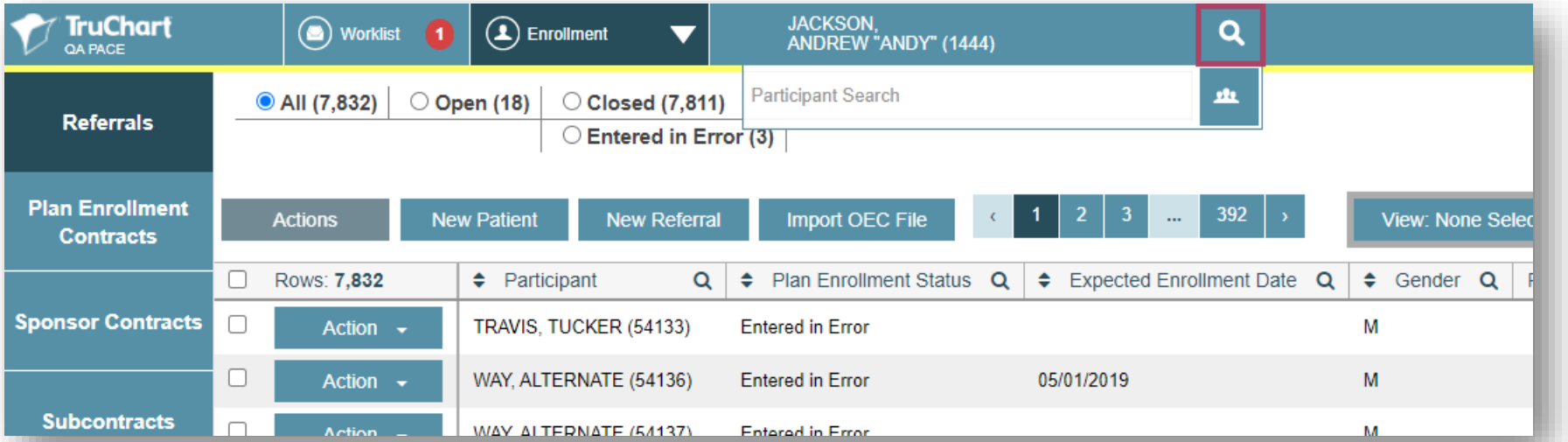
Terminating the Contracts



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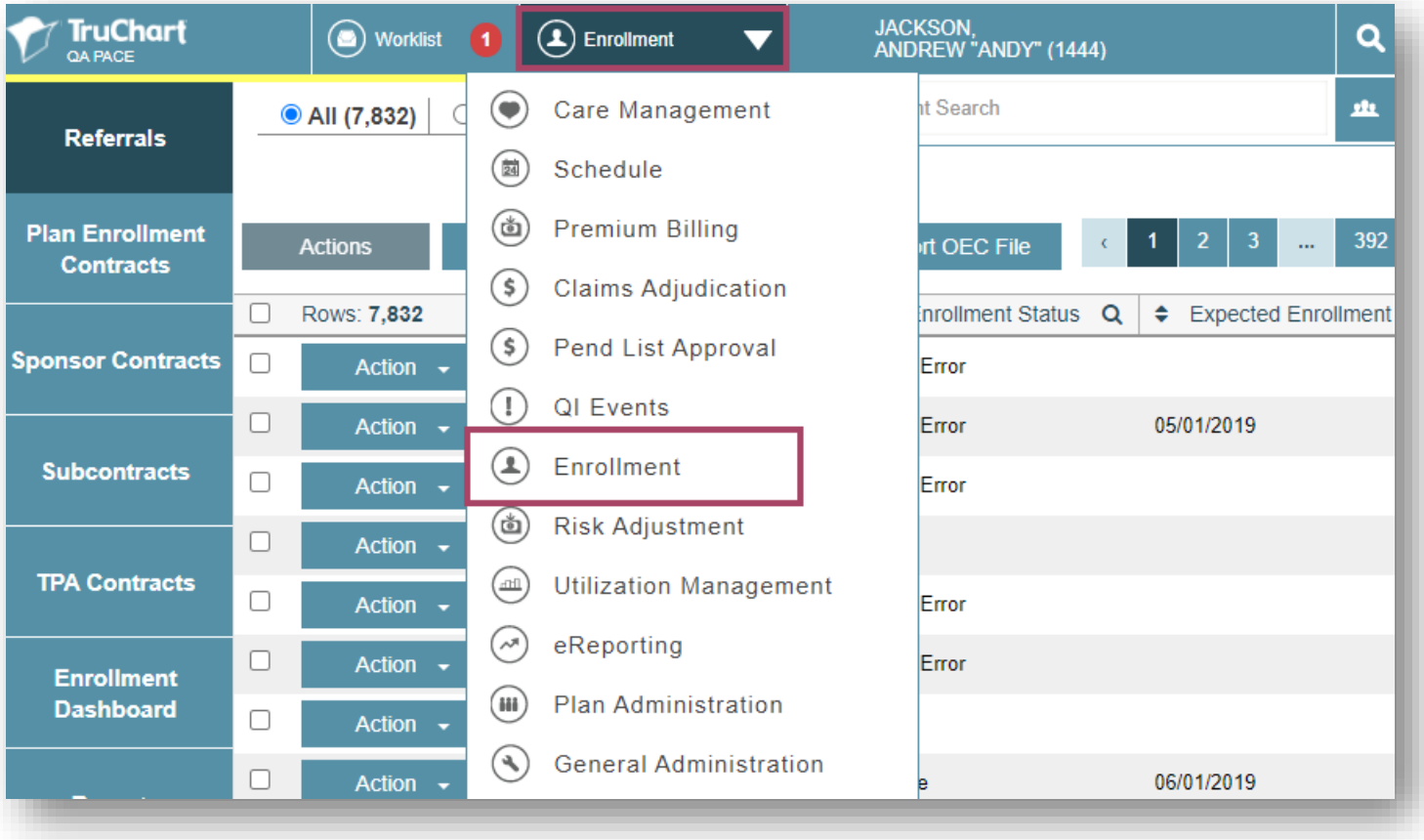

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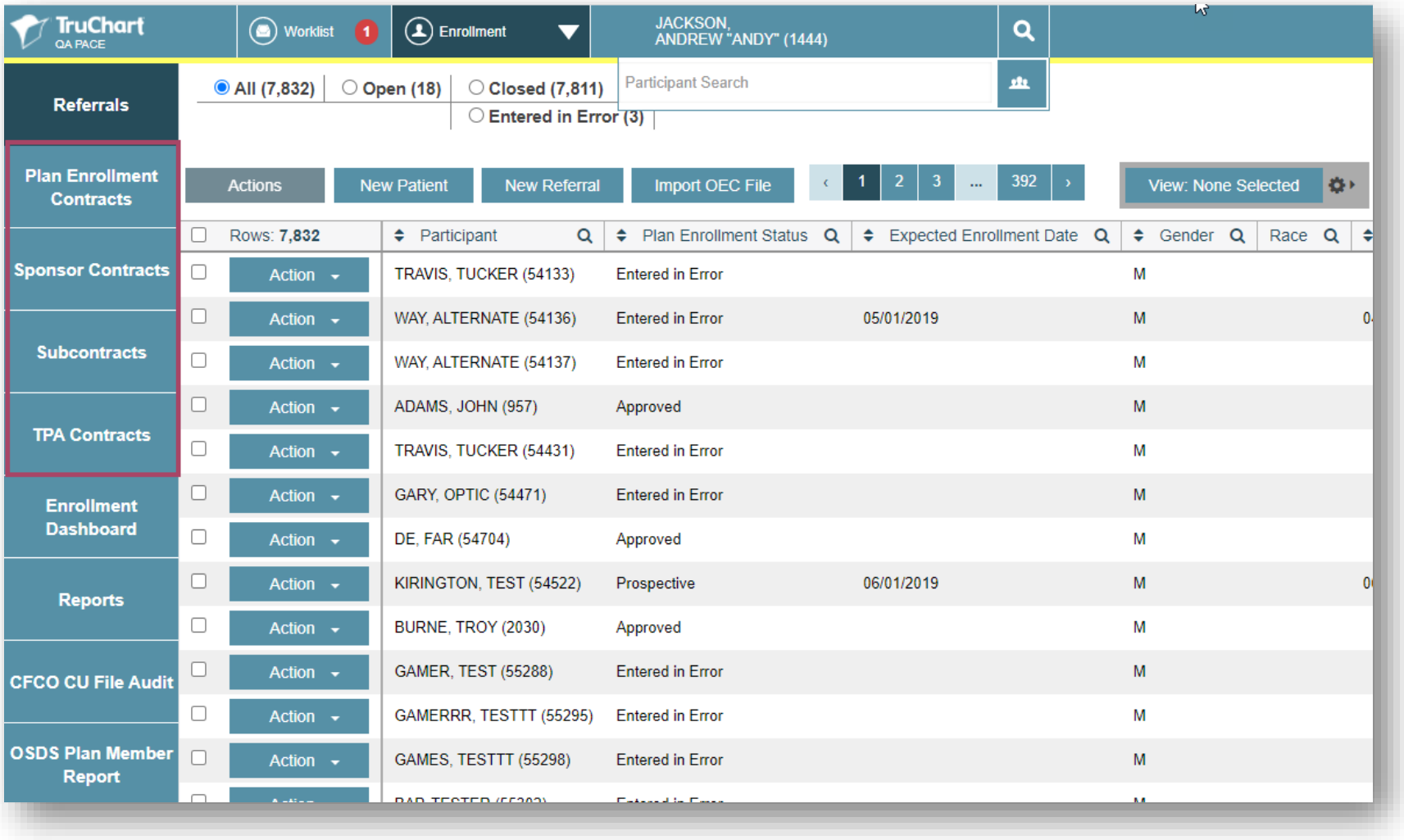
Terminate the Contracts



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Inactivating the Medical Record

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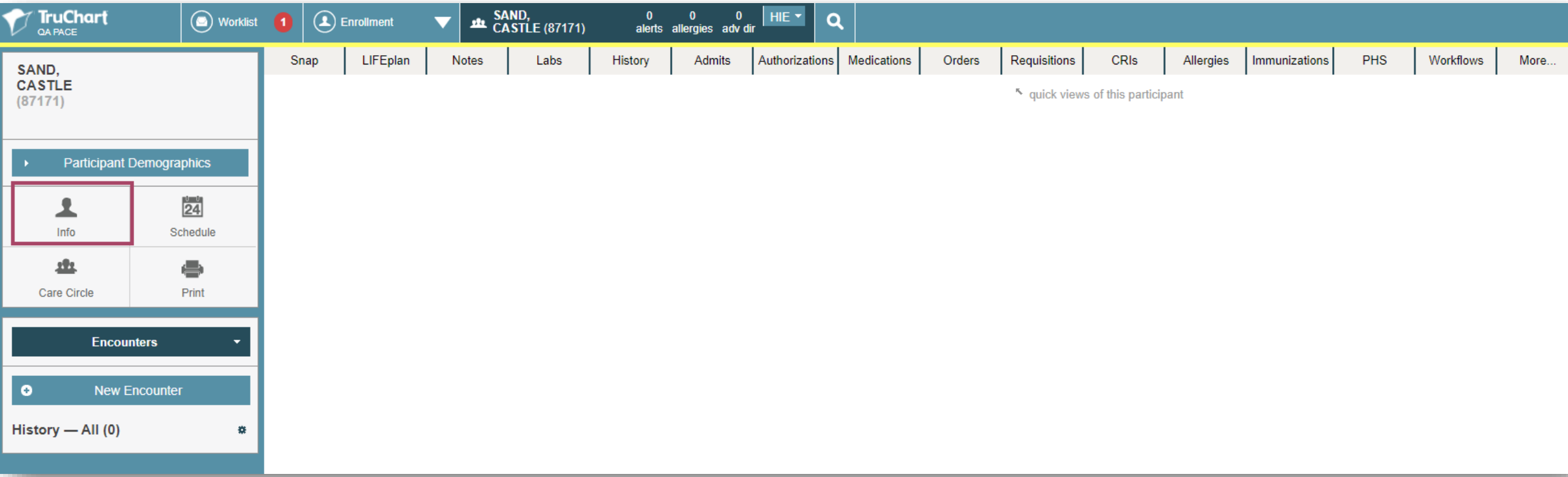

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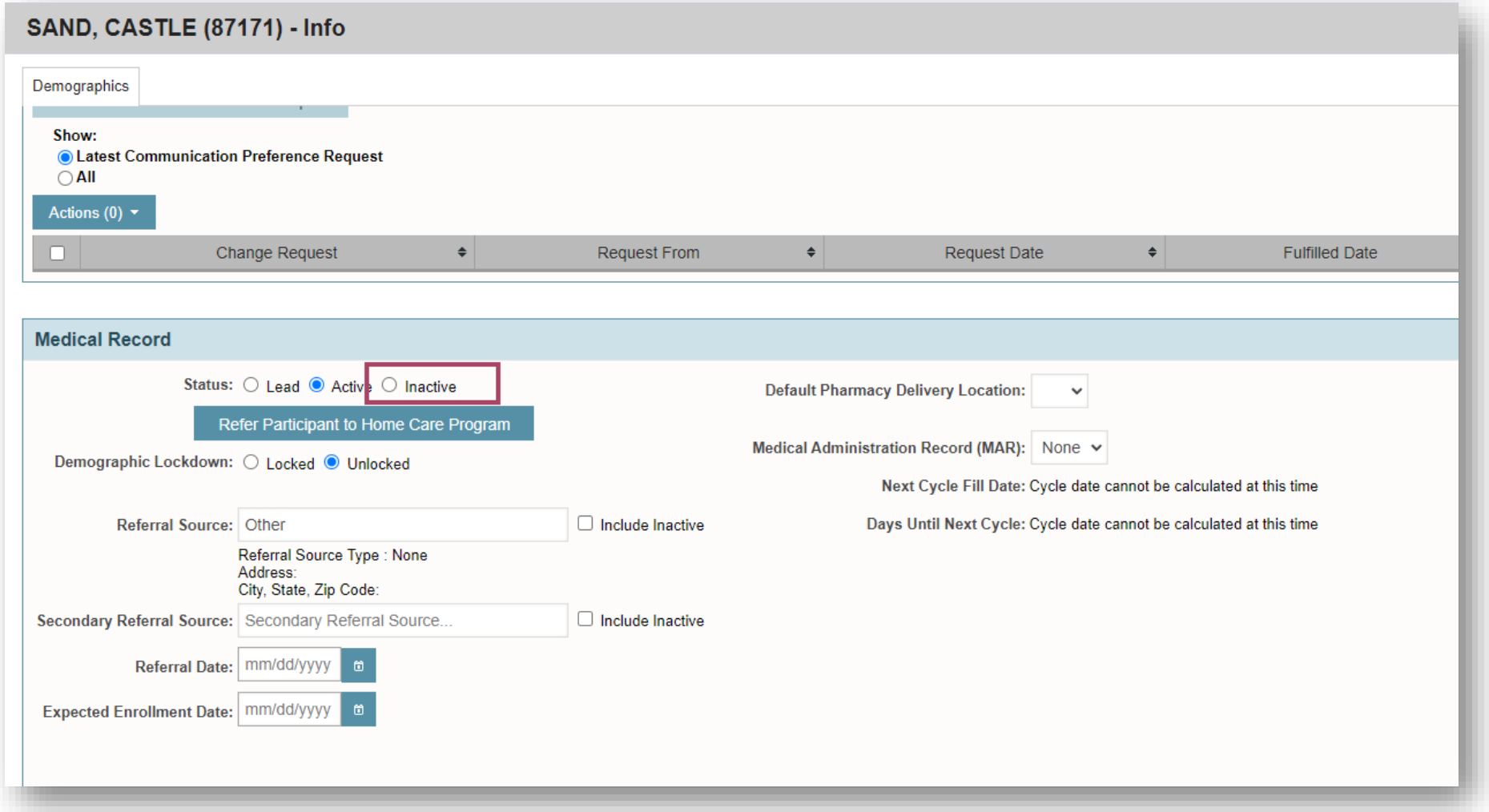
Inactivate the Medical Record



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Demo

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Q&A

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Thank You

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