

User Story

As an employee, I would like to login, choose a desired hospital/facility (if needed) so I can view their patients and start my work which is completing the current tasks. My goal is to help a non-paying patient become a paying patient.

Job to Be Done

Complete the needed tasks for each patient and leave notes.

App Features

- The app updates status accordingly. If all task for a status is complete, the app will make next status active for employee to complete.
- Multiple people/employees can work on the same account
- The app record history of what was done via time, date, and by who/employee per account.

Account Statuses

Accounts ine Trax are sorted by statuses, both primary and secondary, that identify where they are in the referral/screening/certification/billing process. These statuses help MCR manage the large volumes of accounts referred by hospitals and are used to coordinate all follow-up efforts. These statuses are the basis for the language of MCR. All staff will be intimately familiar with this list. The following list shows all primary there are used to prove the upder our work. statuses used in eTrax to track accounts

RF - Accounts referred to MCR Account is currently in the Patient search processno Patient contact

o RF0 - RF accounts still in the month of service o RF1 - RF accounts in the month after the month of service o RF2 - RF Accounts in the second month after the month of service o RF3 - RF Accounts in the third month after the month of service o RF4 - RF Accounts in the fourth month or greater after the month of service

RFP - Accounts where Patient has been contacted, screened and deemed o RFP0 - RFP accounts still in the month of service o RFP1 - RFP accounts in the month of service o RFP2 - RFP Accounts in the second month after the month of service o RFP3 - RFP Accounts in the third month after the month of service o RFP4 - RFP Accounts in the fourth month or greater after the month of service

- TP0 OB Pre-admit TP30 TP1 Accounts that have applications filed at a payer agency and in process and we are awaiting approval notification (normal) TP2 Accounts that have applications filed at a payer agency and in process and we are awaiting approval notification (SSI, CV or TP55) TP3 Coverage discovered on account worked by Hospital or another agency, information is to be held according to the contractual hold period expires TPP Potential Three Month Prior eligibility- Patient has a protected file date.
- Seek/seeking three-month prior eligibility.

TA0 - Third Party Eligibility Approved-Discovered by e-Scan. Also used for Preadmit certifications

- TA1 Approval Notice sent to Hospital

- TA1 Approval Notice sent to Hospital
 TA2 Hospital has billed Payer
 TA3 MCR requesting Hospital to re-bill the Account
 TA4 Hospital has billed payer; No activity for 30 days or more
 TA5 Secondary eligibility approved, approval notice sent to Hospital
 TB1 Hospital has been paid by payer and has posted the payment in the
- Hospital system TB2 MCR has invoiced the Hospital for the account

MCR Training Manual – Book One

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TB3 - Hospital denied payment to MCR for the account TC - Case Completed and Closed. MCR has received payment from the Hospital DP - Eligibility Certified but payment denied by payer- Denial is correct and no appeal is necessary

appeal is necessary DPA - Eligibility Certified but payment denied by payer- Denial is not correct and MCR is appealing the payment denial TD - Third Party Payer Agency denied Patient application for eligibility TDA - Third Party Agency denial of eligibility is being appealed DN - Patient located and screened and MCR deemed Patient ineligible for any

- DNC Patient was uncooperative Refused services or good phone number or good address but no response from Patient.
- DNL MCR personnel have exhausted all efforts to locate the Patient, including home visit if the account balance meets home visit requirements. Bad address was given as home could not be located or received other verification that the
- Patient/guardian has moved and left no forwarding address. X MCR personnel reviewed the Hospital notes on the account and determined that the Hospital already had the benefit information at the time of admit.
- Account was referred in error. C&R MCR personnel received an Inpatient referral as it was determined that
- the Patient had certified benefits, werfied this information was correct and submitted the account back to the Hospital with the benefit information all before the Patient discharged from the Hospital

User Story

App Features

As an employee, I would like to complete all patient statuses and tasks to help them pay their hospital bill and help hospitals non-paying patients become paying patients.

Job to Be Done

Help hospitals get non-paying patients to paying patients through benefits, insurance, or self pay.

1. The app updates status accordingly. If all task for a status is complete, the app will make next status active for employee to complete.

Start

Overall Status Flow Chart





thinking about adding coverages. Admin add /update coverages, thoughts?

on admin screen I am Feature 022 | Priority 2 | coverage evaluation | As an ETRAX ADMINISTRATOR I want another table/tab for to be able to update evaluation rules for the various different coverages so that I can adjust for legislative and regulatory changes in the programs. I should be able to add new questions and new evaluations using a visual workflow editor

User Story

As an admin, hospital or supervisor I would like to quickly add employees accordingly, so everyone can start their duties in Etrax. Only the Etrax Admin can all Hospitals and employees

Job to Be Done

Add users. (Hospital or Employee)

Feature 012 | Priority 1 | User management | As an ETRAX ADMINISTRATOR I want to be able to manage users for each hospital so that I can add, remove, reset passwords and generally unblock users Feature 025 | Priority 1 | system management | As a SYSTEM I want to be able to use some sort of IaC system to set up new accounts on isolated storage so that we can onboard new hospitals

without developer involvement

Add Employee, and view an employee



Add Hospital, and view an hospital



PROTOTYPE LINK



Flow Chart

Screens User Flow





User Story As an admin or employee (all levels), I would like to quickly add patients accordingly, so everyone can start their tasks. Job to Be Done Add patients Feature 014 | Priority 1 | System management | As a SYSTEM I want to be able to provide for HIPAA compliance so that I can legally store patient data in encrypted storage

PROTOTYPE LINK



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RF Status - Accounts referred to MCR Account is currently in the Patient search process-no Patient contact

Tasks:

1. Attempt contact with patient via call and or letters (3 calls and 2 letters) - 7 days apart Alvin Question: Mail letters or email letters or both? I say both. User can print letter out to mail or email letter. - due to HIPAA my recommendation is only via letter unless we can have patient state okay to email.

 If attempt is successful screen patient and determine if potential for any programs - if potential inform patient and assist with program deemed potential and change status to RFP
 If screened and not potential and or patient refuses MCR services return account to hospital

Alvin Question: What programs are we screening for? What determines if the screening process is good or not for each program?

Texas Medicaid – determination is based off household comp., resources and income guidelines

SSD1 - determination is based off duration of disability, medical evidence, work history Crime Victims - patient must verify they did not contribute to the crime and must be fully cooperative with law enforcement and investigation of the reported crime. County Indigent - determination is based under income and resource guidelines. Veterans Affairs - determination is based if patient may have service connected disabilities, emergency services for VA patients may be covered under the Millennium Act A&D (aged and disabled) - determination includes same as Tx Medicaid with a difference in criteria including confirmation of a disability condition and or patients citizenship/residency status

(Note: App will update status RF0-RF4 in every 30 days)

RF0 - RF accounts still in the month of service

- RF1 RF accounts in the month after the month of service
- RF2 RF Accounts in the second month after the month of service
- RF3 RF Accounts in the third month after the month of service
- RF4 RF Accounts in the fourth month or greater after the month of service- Beyond RF4 move to DNC2 status

Screens User Flow





User Story

As an employee, I would like to easily start my RF status tasks, so I can easily accomplish the desired goal which is contacting the patient regarding required needed information.

Job to Be Done

Contact patient.

VIEW PROTOTYPE

Flow Chart

Screens User Flow

RFP Status - Accounts where Patient has been contacted, screened and deemed potentially eligible for benefits, but application not filed

Tasks:

1. Call and or send letters (3 calls 2 letters) asking patient to apply for deemed program and or provide necessary documents to submit the application to agency

Alvin Question: Mail letters or email letters or both? I say both. User can print letter out to mail or email letter.

Due to HIPAA my recommendation is only via letter unless we can have patient state okay to email

(Note: App will update status RFP0-RFP4 in every 30 days)

RFP0 - RFP accounts still in the month of service RFP1 - RFP accounts in the month after the month of service RFP2 - RFP Accounts in the second month after the month of service RFP3 - RFP Accounts in the third month after the month of service RFP4 - RFP Accounts in the fourth month or greater after the month of service



***	Patient Accounts a		×	Somantha C.	
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User Story

As an employee, I would like to easily start my RF status tasks, so I can easily accomplish the desired goal which is contacting the patient regarding required needed information.

Job to Be Done

Contact patient.

VIEW PROTOTYPE

-



y and in process and



Pending?

Screens User Flow



TP1 Status - Accounts that have applications filed at a payer agency and in process and we are awaiting approval notification (normal)

Tasks:

 Contact agency to get update on status of application - verify via TMHP if Medicaid and or if CV call Texas Attorney General office.

check with patient to see if they've received any notices asking for any additional documentation.

Programs for TF

Traces Medical – elementation is laster difficuented comp, resources and more guidance. Crient Visions – parametine are well yell and conversibilitate to the one-and more composition of the second secon

User Story

As a user I would like to quickly contact the agent and or patient for updates of the applications, so I can know if patient is approved or not.

Job to Be Done

Get status of application from agent and or patient. Update application status (approved, denied, pending).

VIEW PROTOTYPE

TP2 Status - Accounts that have applications filed at a payer agency and in process and we are awaiting approval notification (SSI)

Tasks:

 Follow up with SSA for status - call DDS and or Appeals office to check if any status, follow up every 30 days. This program could potentially take up to 2 years for a determination.



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User Story

As a user I would like to quickly contact SSA, DDS, and or Appeal Office for status of SSID.

Job to Be Done

Get SSID status (approved, denied, pending).

VIEW PROTOTYPE



Flow Chart

Screens User Flow

TPP Status - Potential Three Month Prior eligibility- Patient has a protected file date. Seek/seeking three-month prior eligibility.

Tasks:

 Contact patient to screen for 3 month prior, if potential will need to complete a F1113 from HHSC and or A&D (Medicaid Programs) and submit with appropriate documents to agency.



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	FIRST NAME		LAST NAME		ACCOUNT NO
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User Story		
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277		

Image:	18(R 55#	Samantha C. Account # 12146579 Medical Re Deter of Service: Dec 21, 2021 Mag About Task	Dangs Status 199 and # 1254627 Onlyind Islance Due \$500.00 Current Balance \$500.00 um https://mission.com
		1 Inservice Victoria	view Contrasting of the state of th

Flow Chart

Screens User Flow

TA1 Status - Approval Notice sent to Hospital

Tasks:

1. Submit to Business Office to have them bill payor Aivin Question: When submitting to business office, what are you submitting? How are you submitting this currently? example sent to you last week – via email on an excel sheet



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User Story

As a user, I would like to submit approval notice to the hospital and make sure payor been billed, so I can continue with my task regarding the patient.

Job to Be Done

Submit approval notice and make sure payor been billed.

VIEW PROTOTYPE





TA2 Status - Hospital has billed Payer

Tasks:

1. Check status of claim weekly until its paid or denied.





User Story As a user, I would like to check claim status, so I can continue with my task regarding the patient.

Job to Be Done

Check claim status, claim denied, or no activity

VIEW PROTOTYPE

Flow Chart

Flow Chart

Screens User Flow

TA 3 Status - MCR requesting Hospital to re-bill the Account

Tasks: 1. 1. Re submit the billing info to billing office asking to bill payor



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User Story	VIEW PROTOTYPE
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User Story

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Job to Be Done

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VIEW PROTOTYPE



TA5 Status- Secondary eligibility approved, approval notice sent to Hospital

Tasks:

 Check to see if primary has paid and if still pending leave in TA5, if paid and remaining balance place in TA1 and submit the information to billing office to bill secondary and or tertiary



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User Story	VIEW PROTOTYPE
777	
Job to Be Done	
777	



TB1 Status - Hospital has been paid by payer and posted the payment in the Hospital system

Tasks: 1. Enter.



Is there a Remainin

End goes to TB1



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User Story			
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Job to Be Done			
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TB2 Status - MCR has invoiced the Hospital for the account. (All accounts are invoiced)

Tasks:

1. System put all accounts in TB2, after Rosa does invoicing

DP Status -Payer billed, payment denied.

Tasks:

 QA to ensure denial from payor was correct, if incorrect place in DPA and submit to Billing Office and have them appeal denial and or MCR can appeal if has patient approval to submit on their behalf via phone or email.







User Story	
777	
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Flow Chart

DPA Status- Eligibility Certified but payment denied by payer- Denial is not correct and MCR is appealing the payment denial

Tasks:

1. 1. Follow up on status of appeal.



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0		Book	Score & Continue

Flow Chart

TD Status - Third Party Payer Agency denied Patient application for eligibility

Tasks:

1. QA to ensure agency denial is correct,









Flow Chart

Screens User Flow

TDA Status- Third Party Agency denial of eligibility is being appealed

Tasks: 1. 1. Follow up with agency on appeal



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eirak	G, search.	₹ Rtar			Account #: 12345573 Med Date of Service: Dec 2(, 2031	Icol Record #: 12245870 Original Balance Dur: 55 Program Program Type - Medicaid #: 678905				
ഒ	FIRST NAME	LAST NAME	ACCOUNT NUMBER	55#	About Tosk					
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Flow Chart

Start

Screens User Flow

DNC Status - Patient was uncooperative Refused services or good phone number or good address but no response from Patient.

Tasks:

1. 1. Return account to hospital



Patient failed to follow through - missed appointment Patient failed to follow through - missing info.

Patient unresponsive to letters, emails, and phone calls

Flow Chart

Screens User Flow

Patient Accounts () received

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DNL Status - MCR personnel have exhausted all efforts to locate the Patient, including home visit if the account balance meets home visit requirements. Bad address was given as home could not be located or received other verification that the Patient/guardian has moved and left no forwarding address.

Tasks:

1. 1. Return account to hospital



Where on the screen do they choose unable to locate patient?

Samantha C. (http://www.intel.ac.)

ICTS Engenilitationa los \$555.00 Curves Ecount returned per contract Enable to locate patient

Details Notes

Does patient have medicaid?

. Click link below to validate Medicaid status, proper login credentials are required

2 CollPotient

4 tendtmail

6 Apply for Coverage

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Screen Patient

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Screet Patient

Flow Chart

Screens User Flow

DN Status- Patient located and screened and MCR deemed Patient ineligible for any payer program

RF Status Start Potential Patient _____ Select Reason END (Return Account

NO

DN

to Hospital)



Tasks:

1. Return account to hospital Alvin Question: Can you expand on this? What does the current Etrax system do when you return account to hospital? What do you do? It keeps the account in this status for life of account – if hospital request, we submit a list of accounts returned at beginning of each month for returns from previous month.

Click link laster to validate Medicaid status, proper logir credentials are required

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PROTOTYPE

Flow Chart

Screens User Flow

X Status- MCR personnel reviewed the Hospital notes on the account and determined that the Hospital already had the benefit information at the time of admit. Account was referred in error.

Tasks:

1. 1. Return account to hospital

C&R Status- MCR personnel received an Inpatient referral as it was determined that the Patient did not have any benefits. MCR screened the Patient, found that the Patient had certified benefits, verified this information was correct and submitted the account back to the Hospital with the benefit information all before the Patient discharged from the Hospital.

Tasks:

1. 1. Return account to hospital.



Charges transferred to another account

Hospital charity account (existing or preapproved Other party discovered coverage prior to workable.

Patient admitted w/existing coverage known to hospital Patient left hospital without being seen

Total charges adjusted to zero or minimal balance

Account imported in error. Do not wo Account aged at referral, e-Scan only Charges transferred to another account

Hospital charity account (existing or preapproved) Hospital requested account returned Other party discovered coverage prior to workable. Patient admitted wlexisting coverage known to hospita

Patient payment plan arranged prior to referral Total charges adjusted to zero or minimal balance











🗸 eTrax

Flow Chart

Screening



In Google Drive Pg 225-247 in doc: MCR_E-Trax_Deisgn_Document .pdf

Great Information that may help.

> - TP 08, TA 31 and TA 89 IP 32 and TP 55 One Parent

Per each additional 537 552 member







User Story

As a use, I would like to quickly create an invoice.

Job to Be Done

Create Invoice reports

PROTOTYPE LINK

Tasks: 1. Print and mail out letters to patients accordingly when needed via status.

Letter Types:

1. Print and mail out letters to patients accordingly when needed via status.



Date Fecha Case He Alt Al Case Need from Rosa, will get next Friday

Letter Design

- To: Patient Name Patient Address
- From: Hospital Name or MCR/eTrax Account Number: Acount Balance: Date of Service:

Dear [Acct. First Name],



Sincerely yours, [Hospital or MCR Name]

March 18, 2022

💎 Hospital or MCR Name

1

Date: Friday, March 18, 2022

City, State Zip

Date of Discharge:

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