Care Coordination Portal Workflow Guide

2/28/2023

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Introduction/Overview

The AmeriHealth Caritas Ohio (ACOH) Care Coordination Portal will allow all entities involved in the coordination of a member's care to view pertinent information for an ACOH member that will facilitate care coordination and collaboration, in an effort to achieve optimal outcomes for the holistic well-being of our members.

Key components included in the ACOH Care Coordination Portal include the following:

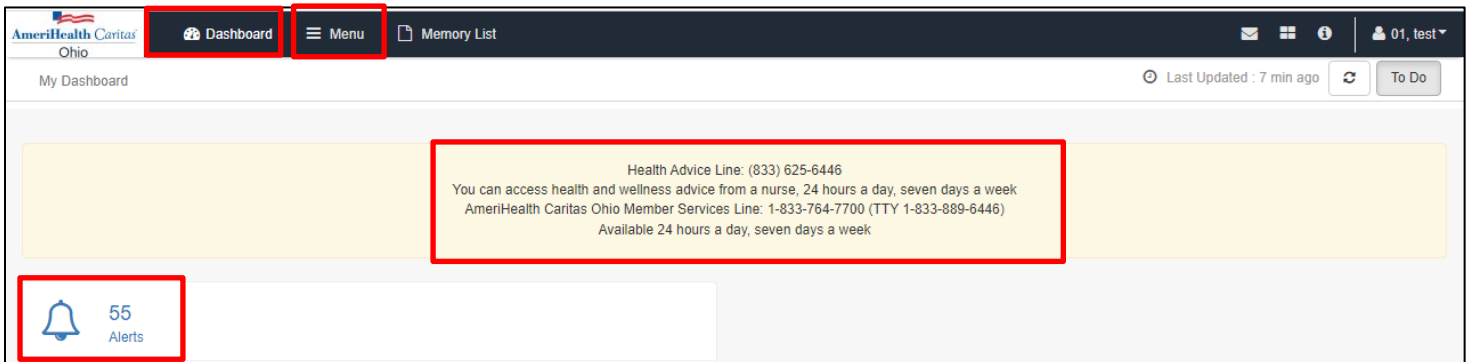| Dashboard	The Dashboard includes the following features:
	• **Alerts** *(to indicate sentinel events such as Care Gaps, Critical Incidents, Inpatient Hospital Admissions, ED visits, Residential Treatment Facility Admissions/Discharges, etc.)*
	• **Menu** option which will allow users to search for a member
	• **Health Advice Line Information** *(24-hr. Nurse Line info.)*
	• **ACOH Member Services Information**
Member Overview	The Member Overview screen will enable users to view/access the following information for a member:
	• **Member Demographic Info**. *(including name, address, gender, date of birth, race, ethnicity and language (REL) info., contact information and contact preferences, all membership numbers (e.g., MCO Member ID, Medicaid ID, Government ID), coverage information, PCP assignment, Authorized Representative and Care Team members, keyword icons to identify specific member designations (e.g. Comprehensive Primary Care, Risk information, etc.)*
	• **Member Alerts** section *(to indicate required sentinel events)*
	• **Gaps In Care** section
	• **Member Eligibility History**
	• **Medical Claims**
	• **Population Health Stream(s)**
	• **Grievance Information**
	• **Member Clinical Summary**
	• **Assessment Summary information** *(e.g. Ohio Health Risk Assessments (HRAs), initial Child and Adolescent Needs and Strengths (CANS) assessments, Value-Added Benefits Tracking Tool, etc.)*
	• **Call History information** *(inbound/outbound contacts related to a member)*
	• **Activities** *(e.g. HIE/ADT information and other ongoing activities related to a member)*
	• **Member Episode information** *(Case Management episodes (including the Plan of Care), Utilization Management episodes (Authorizations), Appeal episodes)*

This Workflow Guide has been developed to assist users with navigation in the ACOH Care Coordination Portal.

Instructions for searching for a member and locating all pertinent information related to a member are provided along with screen shot illustrations to demonstrate key concepts and system functionality.

Dashboard

When users log in to the ACOH Care Coordination Portal, the Dashboard will be displayed as the Home Page.

The AmeriHealth Caritas Ohio logo will display in the upper left corner of the screen, and functional options will be listed in the Application Banner at the top of the screen.
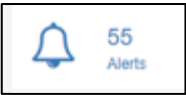

Key areas on the Dashboard screen include the following:

Dashboard Option	The **Dashboard** option on the Application banner allows users to return to the Dashboard from any screen within the Portal.
Menu Option	The **Menu** option on the Application banner will allow users to access functions associated with their user role. The main function in the Menu option is ***Search Members***.
Health Advice Line and Member Services Information	Key details for the **Health Advice Line** *(24-hr. Nurse Line)*, and **ACOH Member Services Line** will be displayed in the center of the Dashboard screen.
Alerts Widget	• The **Alerts** widget *(panel)* is represented by the ⏰ icon. This widget displays the number of alerts that are assigned for members relative to the user role. • Alerts will be generated to indicate required sentinel events for a member *(e.g. Care Gaps, Critical Incidents, Facility Admission/Discharges, etc.)* • By clicking this widget, users can navigate to the **Alerts** screen for more detailed information.

Viewing Alerts

Alerts will be generated to indicate required sentinel events for a member *(e.g. Care Gaps, Critical Incidents, Facility Admission/Discharges, etc.)*

To view details for Alerts, and navigate to the Member Overview screen, follow the guidelines outlined below:

Step	Action
1.	In the Dashboard, click the **Alerts** widget 🔔 55 Alerts *Result:* The **Alerts** list will be displayed. Alerts 	Member Name	Alert Message	 ⚙ Test OHIO CCP, AAA Reg one — OH CCP: Member was admitted to Hospital/Facility. ⚙ Test OHIO CCP, AAA Reg Ten B — OH CCP: Member was admitted to Residential Treatment. ⚙ Test OHIO CCP, AAA Reg Ten B — OH CCP: Member was admitted to Hospital/Facility. ⚙ Test OHIO CCP, ODM — OH CCP: Member was admitted to Residential Treatment. ⚙ Test OHIO CCP, ODM — OH CCP: Member was admitted to Hospital/Facility. ⚙ Test OHIO CCP, AAA Reg eleven — OH CCP: Critical Incident Assessment completed for the Member. ⚙ Test OHIO CCP, AAA Reg eleven — OH CCP: Member has received MRSS. ⚙ Test OHIO CCP, AAA Reg Ten B — OH CCP: ER DC/High ER ⚙ Test OHIO CCP, AAA Reg Ten B — OH CCP: ER DC/Readmission The list will indicate the *Member Name* and corresponding *Alert Message*.
2.	***To navigate to the Member Overview screen…*** Click the gear ⚙ icon corresponding to the required alert message and select **View Member** from the drop-down list. *Result:* The ***Member Overview*** screen for the member will be displayed.

Additional details regarding required sentinel event Alerts are outlined in the "*Quick Reference Guide for Required Sentinel Events,*" located at the end of this document.

Searching for a Member

To search for a member, follow the guidelines outlined below:

Step	Action
1.	Click the **Menu** option on the Application banner and select **Search Members** from the drop-down list. *Result:* The **Member Search** screen will be displayed. Users can search for a member using: • Member Last Name, First Name, **and** Date of Birth (DOB) • Member ID **and** Date of Birth (DOB)
2.	Enter the required search parameters in the designated fields and click the **Search** button. *Result:* The following confirmation window will be displayed: *Result:* The **Member Overview** screen for the member will be displayed.
3.	Click the **Redirect to MCV** option. *Result:* The *Member Overview* screen for the member will be displayed.

Within Step 2:

If using…	Then…
Member Name and DOB	Type the member's information in the **Member Last Name**, **Member First Name**, and **Date of Birth** fields, then click **Search**.
Member ID Number and DOB	• Select the appropriate option from the drop-down list in the **Member ID Type** field. **Member ID Type** --Select One-- --Select One-- ELIG Member ID Government ID State Member ID **Important Note:** The Government ID and State Member ID Type = Medicaid ID (MAID). *Note:* The **ELIG Member ID** option should be selected if you are using the ACOH Member ID. • Enter the appropriate ID number in the **Member ID** field, and the member's DOB in the **Date of Birth** field, then click **Search**.

For Your Confirmation

Test OHIO CCP, ODM

Redirect to MCV

Cancel

Member Overview Layout and Structure

The Member Overview screen provides comprehensive information about a member and the episodes (cases) associated with the member.

Basic components of the **Member Overview** screen include the following:

1 - Member Banner	Displays the member's personal and demographic information.
2 - Workflow Banner	Displays the Navigation path *(or "breadcrumb trail")* of the sections of the Member Overview screen visited.
3 - Display Tabs	The selection of tab in this section determines the information that is displayed in the Widgets (panels) on the right.
4 - Episodes	List of existing episodes (cases) for the member.
5 - Widgets	Display additional information for a member or episode *(depending on the display tab chosen on the left.)*

Member Overview – Member Banner

- The Member banner in the Member Overview screen provides quick access to view a member's demographic and personal information.

- The top portion of the banner will automatically be displayed when you access the Member Overview screen, but you will need to click the [⌄] icon in the right corner of the banner to expand the display and view all information.

Expanded View:

Key information in this banner includes the following:

User Interface Label	Description
Member Name	Displays the Member's Last Name and First Name *(followed by a Gender Indicator)*
	Keyword icons associated with the member to identify specific member designations *(e.g. CPC (Comprehensive Primary Care), CCE assignment, etc.)* ***Note:*** When the user hovers the mouse over the keyword icon, the corresponding description will be displayed. If there are more than 5 keyword icons, an ellipsis is displayed at the end of the 5th keyword. Click the 3 dots to access the full list.
Member DOB	Displays the member's Date of birth, along with age in years
Member ID	Displays the member's ACOH Member ID number

Member Overview – Member Banner *(cont.)*

User Interface Label	Description
	Displays **Authorized Representative** information for the member if one has been identified. *Note:* To view information for all Member Contacts designated as Care Team members, click the **View All** button.
Language	Displays the member's preferred language
	Displays the member's contact preferences regarding phone calls, educational material, and the newsletter. *Note:* When the user hovers the mouse over the indicators, the corresponding description will be displayed.

Member Overview – Member Banner *(cont.)*

User Interface Label	Description
	Displays the member's preferred contact information if they have a specified method of contact that they prefer. Information will be displayed in grid format with the designated order of preferred contact details.
⚠ Risk Score ▾	Displays Risk Score and Risk Tier Information. Designations of **Low** *(Tier 1)*, **Moderate** *(Tier 2)*, or **High** *(Tier 3)* will be displayed.

Member Overview – Member Banner (cont.)
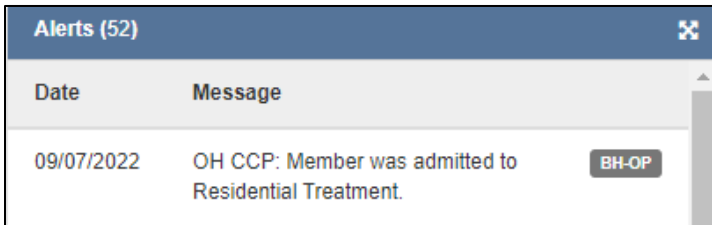
User Interface Label	Description
Address information	Displays the primary address of the member. Click **View all Addresses** to access any additional address information.
Phone and Email information	Displays the primary phone and e-mail information for the member. Click **View all Numbers** to access any additional phone or e-mail information.
Primary Coverage information	Displays the primary insurance coverage details for the member. Click View all Coverages to access any additional insurance coverage information.
Client, Employer and Group information	Displays the member's Plan.
Primary Care Physician (PCP) information	Displays the member's PCP information.
View all Member information	Click this hyperlink to display the **Member Summary.** The Member Summary provides an overview of the member's demographic information, along with *Race, Ethnicity, and Language (REL)* information and **External Case Manager** information.

Member Overview – Widgets

- Widgets (or panels) in the right section of the Member Overview screen provide additional information for a member or episode *(depending on the display tab chosen on the left.)*
- Widgets are displayed based on permissions associated with user roles.
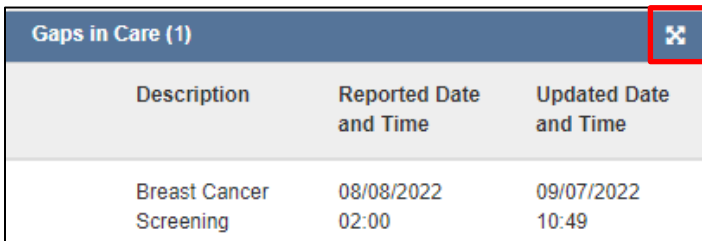- Key Member widgets are outlined below:

Alerts Widget

Alerts (52)		
Date	**Message**	
09/07/2022	OH CCP: Member was admitted to Residential Treatment.	BH-OP
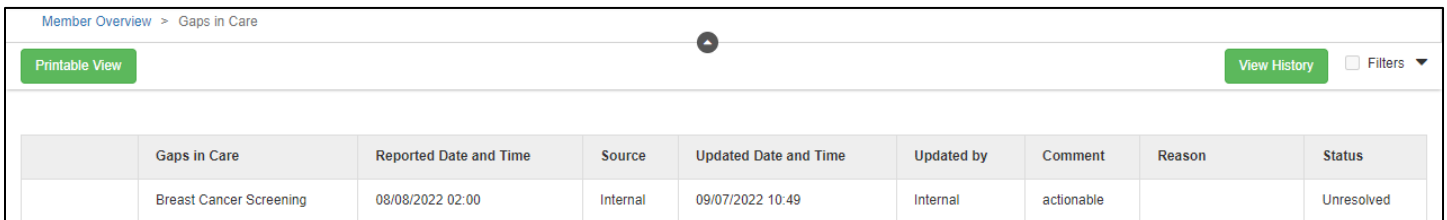
- The Alerts widget will display Alerts generated for the member.

Gaps in Care Widget

Gaps in Care (1)		
Description	**Reported Date and Time**	**Updated Date and Time**
Breast Cancer Screening	08/08/2022 02:00	09/07/2022 10:49

- The **Gaps in Care** widget will display a description of Care gaps identified for a member, along with reported and updated dates and times.
- To see additional details for the Gaps in Care, click the [⌗] icon in the upper right corner of the widget.

Member Overview > Gaps in Care

Printable View								View History	Filters

	Gaps in Care	Reported Date and Time	Source	Updated Date and Time	Updated by	Comment	Reason	Status
	Breast Cancer Screening	08/08/2022 02:00	Internal	09/07/2022 10:49	Internal	actionable		Unresolved

- The **Comment** column will indicate whether the Gap in Care is "*actionable*" or "*informational*."
  - *Actionable* Gaps in Care require an action or response from the member's primary care provider. The primary care provider can submit response information to ACOH when they have resolved that Gap in Care.
  - *Informational* Gaps in Care do not require an action or response from the member's primary care provider.
- The **Reason** column will indicate why the Gap in Care was resolved. This will depend on the type of the Gap in Care.
  - *Actionable* Gaps in Care that are resolved by the primary care provider will indicate "*Care Gap Resolved by Provider*."
  - *Informational* Gaps in Care that are resolved will indicate "*Care Gap Closed*."
- The **Status** column will indicate "*Unresolved*" for Gaps in Care that are still open, or "*Resolved*" for Gaps in Care that are closed.

  > *A closed or resolved Gap in Care will no longer be displayed in the Gaps in Care widget on the Member Overview screen, but once the user clicks the [⌗] icon to expand the widget, details for all resolved and unresolved Gaps in Care will be displayed.*

Member Overview – More tab

- The **More** tab on the upper right-hand side of the Member overview screen will provide links to some of the widget panels and other data and functionality that may not be displayed in the Member Overview widget panels *(e.g. Population Health Portal, Assessment Summary, etc.)*
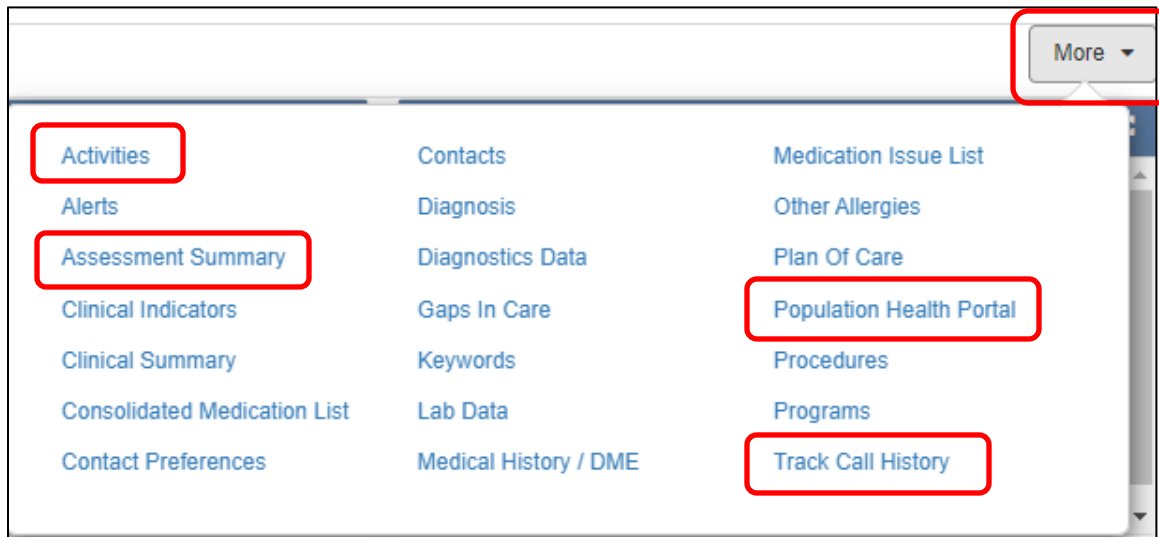
Key links for member information are outlined below:

Activities	Specific Activities *(open or closed)* will display HIE/ADT information. Other ongoing activities for the member will also be listed.
Assessment Summary	Provides a list of Assessments that are completed for the member. *(Examples include the Ohio HRA, Value-Added Benefits Tracking Tool, etc.)*
Population Health Portal	Provides a list of tabs to access additional information for the member, including the following: • **Claims Data** – displays ACOH medical claims information. Pharmacy claim information is available in the SPBM (Gainwell) portal. • **Eligibility History** (the history of a member's eligibility with ACOH) • **Population Health Streams** – displays the assigned population health stream(s) for the member. • **Grievance Information** – displays information pertaining to any grievances that are on file with ACOH for the member. • **Clinical Summary and Care Gaps** – displays a medical history summary for the member based on claims data including EPSDT screening information.
Track Call History	Displays inbound/outbound contacts related to the member.

Member Overview – More Tab - Activities
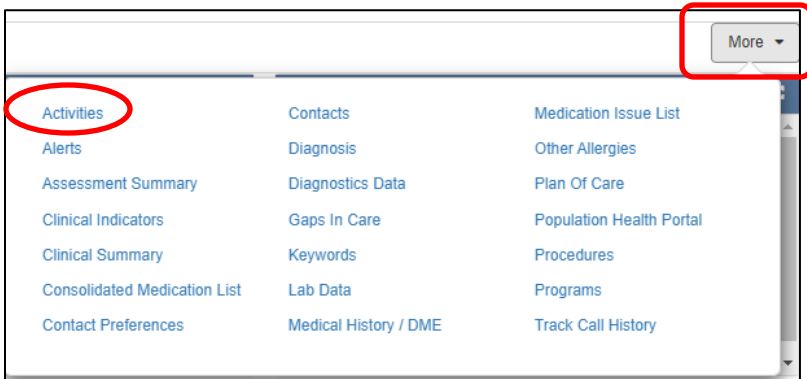
The **Activities** link on the *More* tab will display HIE/ADT information and other ongoing activities for the member.

Member Overview – More Tab – Assessment Summary

The **Assessment Summary** link on the *More* tab will provide a list of Assessments that are completed for the member.

To view a summary of the Assessment, click the gear icon [⚙] next to the desired Assessment and select **View Summary** from the drop-down list.
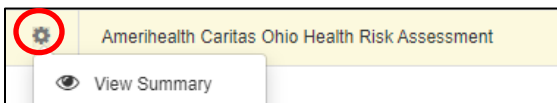
Result: The **Assessments Summary** screen for the selected Assessment will be displayed.

Member Overview – More Tab – Population Health Portal

The **Population Health Portal** link on the *More* tab will provide a list of tabs to access additional information for the member.
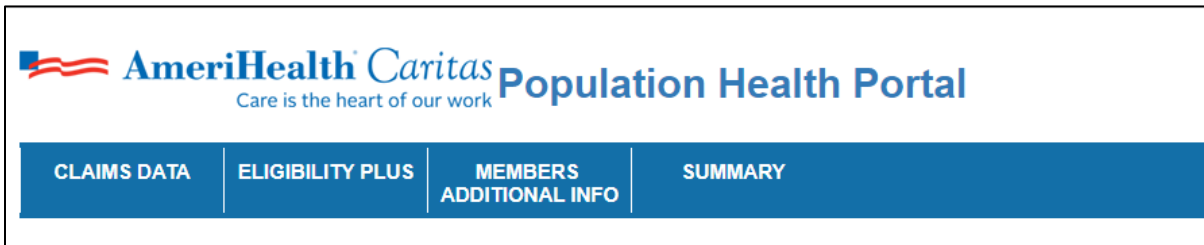
Key elements are outlined below:

Claims Data

The **Claims Data** tab provides a drop-down option to view ACOH Medical Claims information for the member. ***Note:*** Pharmacy claims information is available in the SPBM (Gainwell) Portal.

Click the **Medical Claims** option to view a list of ***paid*** Medical claims *(if applicable)* for the member.

To view additional details about a particular claim, click the **Claim No.** hyperlink.

Member Overview – More Tab – Population Health Portal *(cont.)*

Eligibility History

To view Eligibility History information for a member *(eligibility with ACOH),* click the **Eligibility Plus** tab on the **Population Health Portal** menu and select the **Eligibility History** option from the drop-down list.

ELIGIBILITY PLUS

Eligibility History
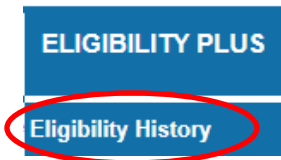
Result: The **Member Eligibility History** screen will be displayed.

Member Eligibility History

Member Information

Member Name: **Test Member**
Date of Birth:
Member ID:
Alt.Payee:

History

From	Through	Eligible	Plan	Product	Reason
01/01/1920	07/31/2020	No	ACOHPlan	TestACOH	
08/01/2020	12/31/2199	Yes	ACOHPlan	TestACOH	

Population Health Streams

To view the assigned population health stream(s) for the member, click the **Members Additional Info.** tab on the **Population Health Portal** menu and select the **Population Health Streams** option from the drop-down list.

MEMBERS ADDITIONAL INFO

Population Health Streams

Result: The **Population Health Stream(s)** assigned for the member will be displayed.

AmeriHealth *Caritas*
Care is the heart of our work **Population Health Portal**

CLAIMS DATA	ELIGIBILITY PLUS	MEMBERS ADDITIONAL INFO	SUMMARY

Population Health Streams

Women of Reproductive Age - Non-High Risk

Adults with Chronic Conditions

Member Overview – More Tab – Population Health Portal *(cont.)*

Grievance Information

To view information pertaining to any grievances that are on file with ACOH for the member, click the **Members Additional Info.** tab on the **Population Health Portal** menu and select the **Grievance Information** option from the drop-down list.
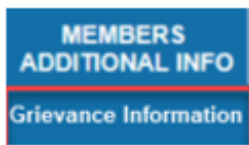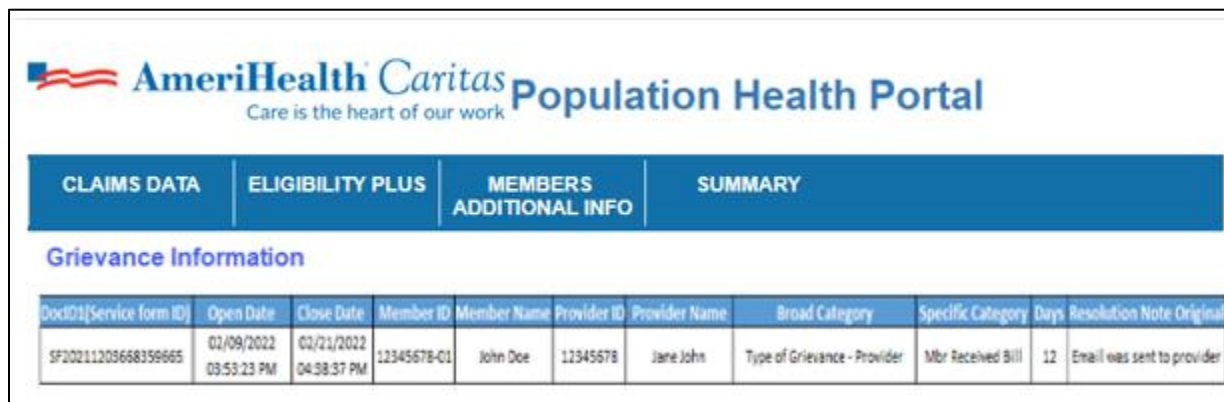

Result: **Grievance Information** details will be displayed *(if applicable).*

Clinical Summary and Care Gaps

To view a medical history summary for the member *(based on claims data)*, click the **Summary** tab on the **Population Health Portal** menu and select the **Clinical Summary and Caregaps** option from the drop-down list.

Result: The **Medical History Summary** screen for the member will be displayed. Key sections of information included in the Summary are listed below:

- Member Demographic Info.
- Important Tests and Services (within the last 24 months – includes EPSDT screenings)
- Social Determinants information (within the last 12 months)
- Recent Hospital Notifications (within the past 3 months)
- Clinical Conditions (within the last 12 months)
- Medicine (within the last 24 months)
- Emergency Room Visits (within the last 24 months)
- Hospital Admissions (within the last 24 months)
- Observation Stays (within the last 24 months)
- Office Visits (within the last 24 months)
- Dental Claims (within the last 24 months)
- Imaging (within the last 24 months)
- Covid-19 Vaccine Status
- Lab Data (within the last 24 months)

Member Overview – More Tab – Track Call History

The **Track Call History** link on the *More* tab displays inbound/outbound contacts related to the member.

To view a Summary of call details, click the gear icon next to the desired Call and select **View Summary** from the drop-down list.

Result: The **View Summary** screen for the call will be displayed.

Member Overview – Episode Information

Episodes of care (cases) for a member are listed in the left pane of the **Member Overview** screen.

A snapshot of information related to the episode is displayed.

- Episode-related records are indicated by **Episode Type**.

OP Episode	Will house Outpatient Medical Authorizations
IP Episode	Will house Inpatient Medical Authorizations
BH-OP Episode	Will house Outpatient Behavioral Health Authorizations
BH-IP Episode	Will house Inpatient Behavioral Health Authorizations
CM Episode	• Will exist if a member has agreed to Care Coordination with an ACOH Care Manager, Care Manager Plus, Care Guide, or Care Guide Plus. • This episode houses the **Plan of Care** if one exists, as well as Assessments that have been completed with the member.
Appeal Episode	• Will exist if any services have been appealed. • Information on the outcome of the Appeal is housed in this episode.

- The **Status** field will indicate the status of the episode *(e.g. Open, Closed, etc.)*

- To view **Episode Details**, click the gear icon next to the desired Episode and select **View More Information** from the drop-down list.

- To open an episode to view additional information, click the gear icon next to the desired Episode and select **Open** from the drop-down list.

Member Overview – Episode Information *(cont.)*

Utilization Management Episodes

- Utilization Management Episodes **(IP/OP/BH-IP/BH-OP)** will contain details for Prior Authorizations.

- Click the gear icon ⚙ next to the desired Episode in the **Member Overview screen** and select **View More Information** from the drop-down list, to display the **Episode Details** window.

    Sample of Episode Details window for an IP episode:

Episode Details		❓ ×
Start Date	09/07/2022	LOS	1
Admit Date	09/07/2022	Status	Open
Assigned To	Westre, Kristi	Providers	AKRON GENERAL MEDICAL CENTER, (Facility/Vendor),

[Close]

    Sample of Episode Details window for an OP episode:

Episode Details		❓ ×
Service Date	09/12/2022	Status	Open
Assigned To	Westre, Kristi	Providers	AKRON GENERAL MEDICAL CENTER, (Facility/Vendor),

[Close]

- Key elements displayed in the **Episode Details** window include the following:

    o Admit/Service Date

    o Length of Stay for IP episodes

    o Provider of service

Member Overview – Episode Information *(cont.)*

Utilization Management Episodes *(cont.)*

- Click the gear icon ⚙ next to the desired Episode in the **Member Overview screen** and select **Open** from the drop-down list, to open and display an Episode if further information is necessary.

- In UM episodes, Stay/Service information is displayed in the pane on the left and Widgets (panels) related to the episode are displayed on the right *(e.g. Diagnosis, Providers, etc.)*

- You can use the scroll bars to view additional details for each line or you can expand the Stay/Service Request section to view additional information by clicking the ▷ icon in the middle of the screen. To restore it to the default setting, you can click the ◁ icon

- To view Assessments related to the episode, click the **Workflow** button in the upper right corner and select **Assessments** from the drop-down list.

Member Overview – Episode Information *(cont.)*

__Case Management Episodes__

- A Case Management Episode will exist if a member has agreed to Care Coordination with an ACOH Care Manager, Care Manager Plus, Care Guide, or Care Guide Plus.

- Click the gear icon ⚙ next to the desired CM Episode in the **Member Overview screen** and select **View More Information** from the drop-down list, to display the **Episode Details** window.
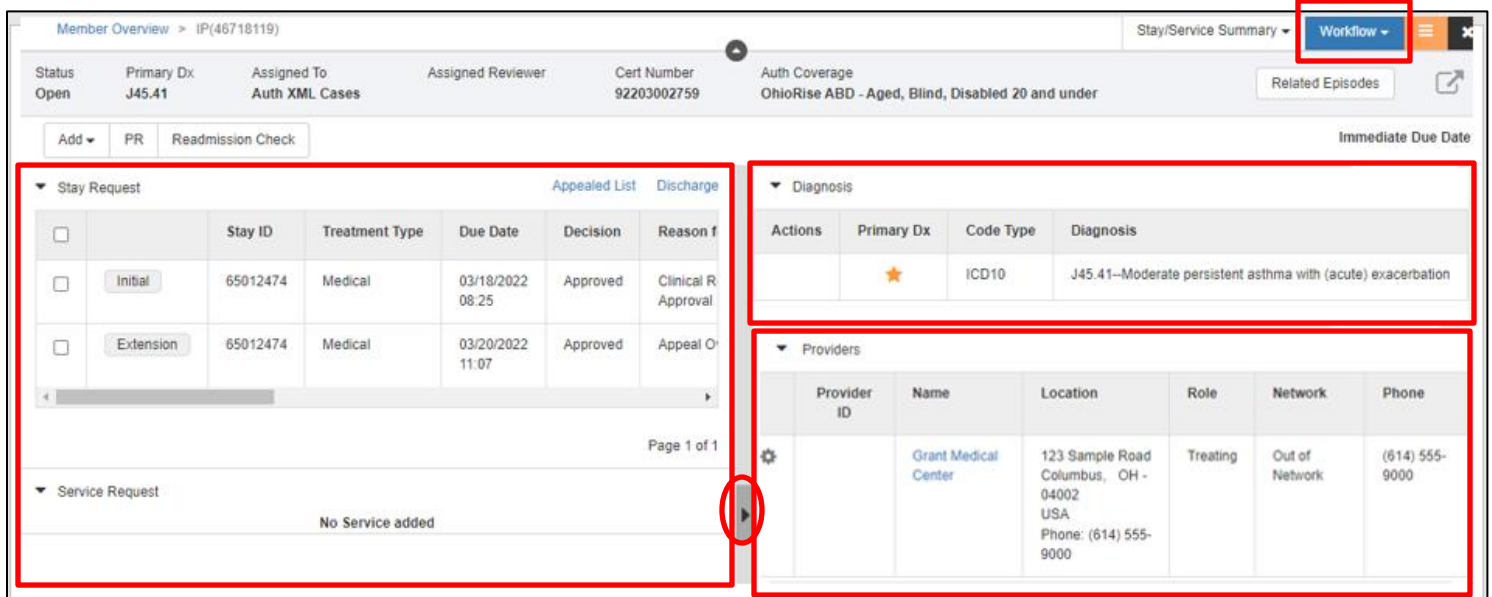
Episode Details			
Status	Open	Acuity Level	0
Start Date	08/15/2022	Care Coordinator Title	Care Manager Plus
Care Coordinator Name	Strain, Christie	Care Coordinator Phone	(215) 394-7190
Program	CM Tier 1 -Low Risk	Care Coordinator Email	cstrain@amerihealthcaritas.co
Source	Elective		

- Key elements displayed in the Episode Details window include the following:
  - Start Date of the CM episode
  - Program Information - will indicate **Risk Tier**
  - Care Manager/Care Manager Plus/Care Guide/Care Guide Plus Name and Contact Information

- Click the gear icon ⚙ next to the CM Episode in the **Member Overview screen** and select **Open** from the drop-down list, to open and display the Episode if further information is necessary.

- In CM episodes, key events or information related to the Member's care *(e.g. Problems, Programs, Activities, etc.)* will be displayed in the Widgets (panels).

Case Management Episodes *(cont.)*

- To view Assessments related to the episode, click the **Workflow** button in the upper right corner and select **Assessments** from the drop-down list.

- To view the Plan of Care for the member, click the **Workflow** button in the upper right corner and select **Plan of Care** from the drop-down list.

- The Plan of Care screen will display all active Care Plans for the member.
- **Problems**, **Goals,** and **Interventions** will be displayed left to right.
- In the Plan of Care, each identified Problem includes one or more Goals, and each Goal lists the planned Interventions that are required to attain that Goal.

To print a Plan of Care, follow the steps outlined below:

Step	Action
1.	Click the **Preview** button in the upper left corner of the Plan of Care screen. *Result:* The *Plan of Care Preview* screen will be displayed.
2.	Click the **Print Preview** button in the left corner of the screen. *Result:* The Plan of Care will be displayed in a separate pop-up window.
3.	Click the 🖶 Print icon in the upper right corner of the window. *Result:* The **Print** properties window will be displayed.
4.	Select the desired properties, then click the **Print** button.

Member Overview – Episode Information *(cont.)*

__Appeal Episodes__

- An Appeal Episode will exist if any services have been appealed.

- Click the gear icon ⚙ next to the desired Appeal Episode in the **Member Overview screen** and select **View More Information** from the drop-down list, to display the **Episode Details** window.

- Key elements displayed in the Episode Details window include the following:

  o Appellant Type
  o Appeal Category
  o Appeal Level (e.g., 1st Level, State Fair Hearing)

- Click the gear icon ⚙ next to the Appeal Episode in the **Member Overview screen** and select **Open** from the drop-down list, to open and display the Episode if further information is necessary.

- Appeal Service information will be displayed on the left-hand side of the episode screen with Stay Request and Service Request Lines listed separately.

- You can use the scroll bars to view additional details for each line *(e.g. Appeal Decision)*, or you can expand the Stay/Service Request section to view additional information by clicking the ▷ icon in the middle of the screen. To restore it to the default setting, you can click the ◁ icon.

- The Appeal Assessment will provide detailed information about the Appeal. To view Assessments related to the episode, click the **Workflow** button in the upper right corner and select **Assessments** from the drop-down list.

Quick Reference Guide for Required Sentinel Events

Guidelines for required member sentinel events are outlined below:

If the member has…	Then the following Alert message will be displayed…	And additional detailed information can be found in the following sections of the Care Coordination Portal…
an Inpatient Admission or Behavioral Health Inpatient Admission	OH CCP: Member was admitted to Hospital/Facility	**IP or BH-IP Episode** *(accessible via the Episode list on the left side of the Member Overview screen)*
an Emergency Room Visit	OH CCP: ER DC	**ER Activity** *(accessible via the **Activities** link option under the **More** tab, which is located on the upper right-hand side of the Member Overview screen)*
Identified Gaps in Care	OH CCP: *Specific Care Gap will be listed*	**Gaps in Care widget** on the Member Overview screen
a Residential Treatment Admission	OH CCP: Member was admitted to Residential Treatment	**BH-OP Episode** *(accessible via the Episode list on the left side of the Member Overview screen)* **Note:** The "*Treatment Setting*" field will indicate *RTF.*
a Residential Treatment Discharge	OH CCP: Member was discharged from Residential Treatment	**BH-OP Episode** with "*RTF*" Treatment Setting will have a "*Closed*" Status
Mobile Response and Stabilization Services (MRSS)	OH CCP: Member has received MRSS	**BH-OP Episode** will contain MRSS Procedure Codes
an Identified Critical Incident	OH CCP: Critical Incident Assessment completed for the Member	"**OH Critical Incident Report Tool**" Assessment *(accessible via the **Assessment Summary** link option under the **More** tab, which is located on the upper right-hand side of the Member Overview screen)*