A Safer Way to Submit Approval Forms/Letters with PHI

• Today, I am going to walk viewers/attendees through how to use easy it is to submit selections with this system.

• In 2019, DSS introduced a forward-facing website allowing recipients, providers and local caseworkers to update a recipient's provider.

• Effective June 1, 2021, DSS will require clinics whose providers require permission to use this system to submit the selection with the attached approval form/letter.

• Benefits
  • Approval forms/letters containing PHI are submitted securely.
  • Approval forms attached to the electronic document. No chance of getting stuck between two large faxes for prior authorizations.
  • Providers should not receive duplicate requests for Approval forms/letter from the recipient.
  • Providers will no longer receive calls from the State office about unreadable forms/letters.
  • Recipients should no longer get auto assigned to the incorrect provider.
Why?

Around 16% of the providers in the PCP program have a closed caseload requiring recipients to obtain an approval form/letter.

The recipient is unable to use the online system to select unless they can attach an approval form/letter.

When the recipient fails, they call either the local office or the state office to receive assistance. The local office can submit the selection with a dummy approval, the state office directs them to the providers office to get the approval letter/form.

Next the recipient tries to submit on paper.

Both paper forms and online selections from the local office without the approval require the state to manually generate a letter asking the recipient to seek approval from their provider.

If the approval is not received in the allotted time frame, the recipient is auto assigned.

Places the provider in a position to not get paid by Medicaid for services provided.

Submission of the approval form/letter online ensures that the task is completed, and the recipient is on the caseload of the correct provider.
Verify Recipient

- Go to https://dss.sd.gov/pcphhselection.
- System can be used for either Care Management Programs.
- Choose Select a new PCP and HH
- Enter recipient ID, case number and DOB and hit verify
- Case Number found on Eligibility Portal. See next slide 3-7 for demo.

Select one of the following options:

- Select a new PCP and HH
- Change an existing PCP and HH

Security Check: You must complete the following security check before submitting your PCP and HH information

Recipient ID * Case # * Recipient DOB *
☐ This is a future case number

To continue, select "Verify" button below.

[Verify] [Cancel]

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Determine if you have access

• Checking the eligibility of a recipient requires the user to have access to the Eligibility portion of the Online Provider Portal.

• If the user has access, the user should have a Recipient Info half moon on the dashboard of their portal screen.

• If the Recipient Info half moon does not appear on the dashboard, the user will need to request access from their Provider Admin.
Checking Eligibility for a Recipient

- Click on the recipient Info half moon and select Eligibility
Find Case Number

- Choose the Service Type and the Dates of Service
- Enter the Recipient ID
- Select Add

Cost Share Type

Secondary Text:

Physician Services

Dates of Service

03/01/2021
03/31/2021

Search Option #1:
Recipieent ID

Search Option #2:
Recipient First Name
Recipient Last Name

3 out of 4 are required for a search.

Last 4 of SSN
Date of Birth

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Check Eligibility

- Click on the Check Eligibility button

<table>
<thead>
<tr>
<th>IHS</th>
<th>Eligibility</th>
<th>Coverage</th>
<th>Recipient ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>SSN</th>
<th>Birth Date</th>
<th>From Date</th>
<th>To Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>03/01/2021</td>
<td>03/31/2021</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This is not a guarantee of benefits or payment. The data shown is the latest information available. All payments are subject to any limitation or exclusions that are in effect at the time the patient receives services.
Quick View of Eligibility

• Click on the View button to pull back eligibility return document

### Recipient Eligibility Inquiry

<table>
<thead>
<tr>
<th>IHS</th>
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<th>From Date</th>
<th>To Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>ACTIVE</td>
<td>Full</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>03/01/2021</td>
<td>03/31/2021</td>
<td>View</td>
</tr>
</tbody>
</table>

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Review the Return Document

- Document Case number
  See red arrow.
- Verify Primary Care Provider/Health Home Provider.
- Obtain referral if needed.
- Help change if needed.
Verify Recipient

• Go to https://dss.sd.gov/pchhselection.
• Enter recipient ID, case number and DOB and hit verify

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Security Check: You must complete the following security check before submitting your PCP and HH information

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To continue, select "Verify" button below.

✔ Verify ❌ Cancel

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Continue with Online Entry for a Selection of a New provider

- Select the check box at the bottom and most of this screen will disappear.
Pick the Provider

• Maximize the number of providers on the screen by changing the number of providers listed for each screen to 30 or 40 as noted in the screen below.

• Once the provider is chosen, click on the Select button.

• Take note of the other status indicators on the page.
Finalize Selection

• Click OK in the pop up to select a provider for the recipient
• If provider requires permission, the attachment can be added by clicking on the Add Attachment button. Format types include: PDF, JPEG and GIF
• Complete the signature and phone number
• Click on Submit only or Submit/Print if the user would like to maintain a copy
• Make sure the system confirms submission.
What happens once you hit submit?

- Forms with attached approvals will be reviewed to ensure that they are actual approvals.
- Clinics can rethink the approval documents and simplify. DSS just needs a form that states approval.
- Beyond that, no other human intervention occurs.
- Data is moved according to DSS policies and updated in our system. Recipient receives letter.
- Using this automated process will save everyone time and decrease errors.
Thank You

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