Interactive Care Reviewer

Submit and inquire about behavioral health authorizations

This communication applies to the Medicare Advantage and Medicaid programs in Kentucky.

Course objectives

After completing this course, participants will be able to:

- List the benefits of using Interactive Care Reviewer (ICR).
- Identify the products and services available within ICR for authorizations.
- Access ICR through the Availity Portal.
- Create an authorization.
- Inquire about a previously submitted authorization.

Agenda

Agenda for this course:

- To review the benefits of using ICR for authorizations
- To create and submit inpatient/outpatient requests
- To inquire about an existing request

ICR details

ICR brings improved efficiency to the precertification process:

- Physicians and facilities can submit authorization requests for behavioral health services, including acute inpatient stays, residential and rehabilitation stays, intensive outpatient and partial hospital programs, electroconvulsive therapy, transcranial magnetic stimulation and psychiatric testing.
- Ordering and servicing physicians and facilities can use the inquiry feature to find information on any authorization with which their tax ID/organization is affiliated.

Advantages of using the ICR

There are many advantages in using the ICR. The ICR improves the efficiency of the authorization process:

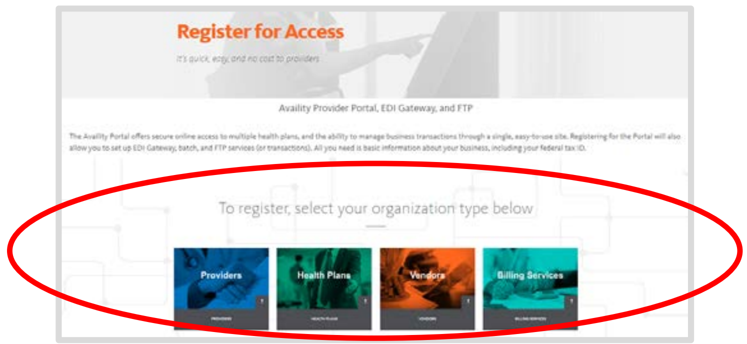
- Authorizations are in one place and are accessible at any time by any staff member.
- No need to fax! Reduced paperwork!
- Users can quickly check authorization status online and update requests.
- Proactive communication is conducted via email updates.
- Users can attach and submit clinical notes and supporting images.
- The ability to inquire on authorization requests submitted via phone, fax, ICR or other online tool.

Accessing the ICR

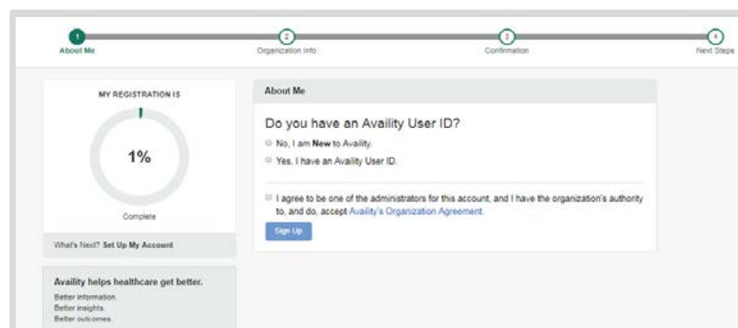
Access the ICR via the Availity Portal (**https://www.availity.com**).

1 **Select the REGISTER link to be redirected to the *Registration details* landing page.**

2 **Select the appropriate organization type link, and you will be redirected to the *Registration Form*.**

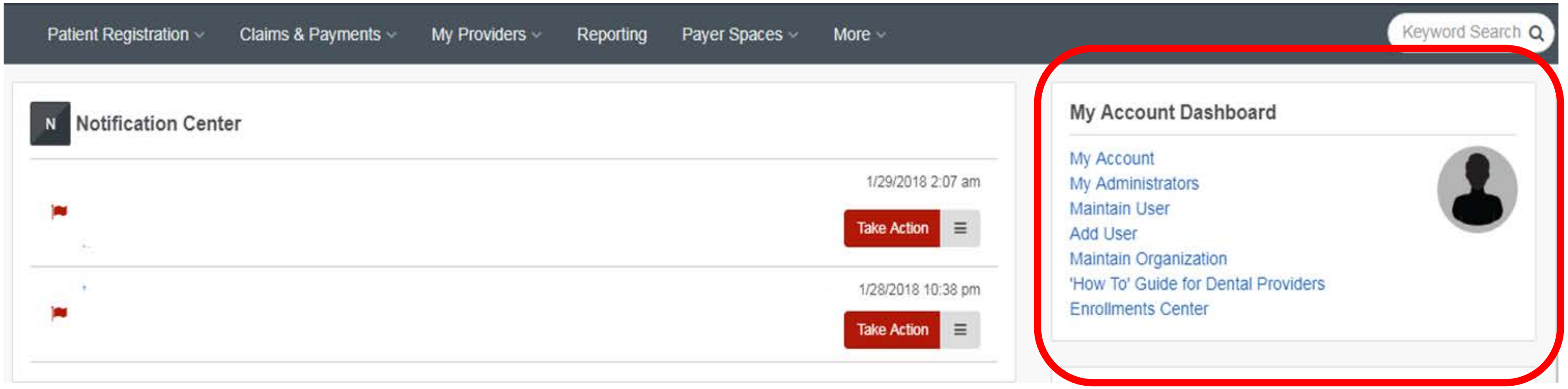


3 **The person starting the registration process agrees to be the administrator for the organization and can now register for the Availity Portal.**



Anthem.

Availity administrator: granting access on the Availity Portal



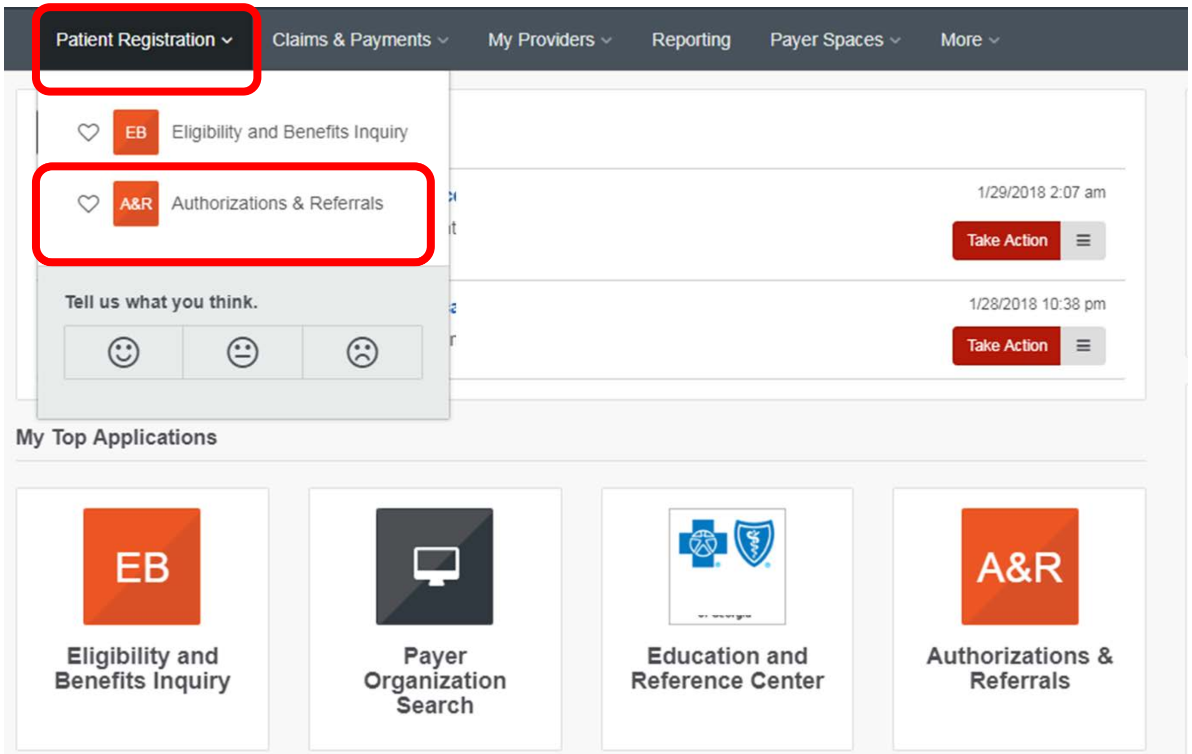
The organization's Availity Portal administrator can select **Maintain User** from their *Account Dashboard* located on the upper-right corner of the home page to add functionality to an existing user. To create a new access, the administrator selects **Add User**.

Availity administrator: granting access to the Availity Portal (cont.)

	☐	Role(s)
User Roles		
	☑	Base Role
	☑	Authorization and Referral Inquiry
	☑	Authorization and Referral Request
	☑	Claim Status
	☑	Claims Management

Assign users the roles of **Authorization and Referral Inquiry** and **Authorization and Referral Request**.

Accessing the ICR



To access the ICR from the Availity Portal, choose **Authorizations & Referrals** under the *Patient Registration* link on the top navigational bar.

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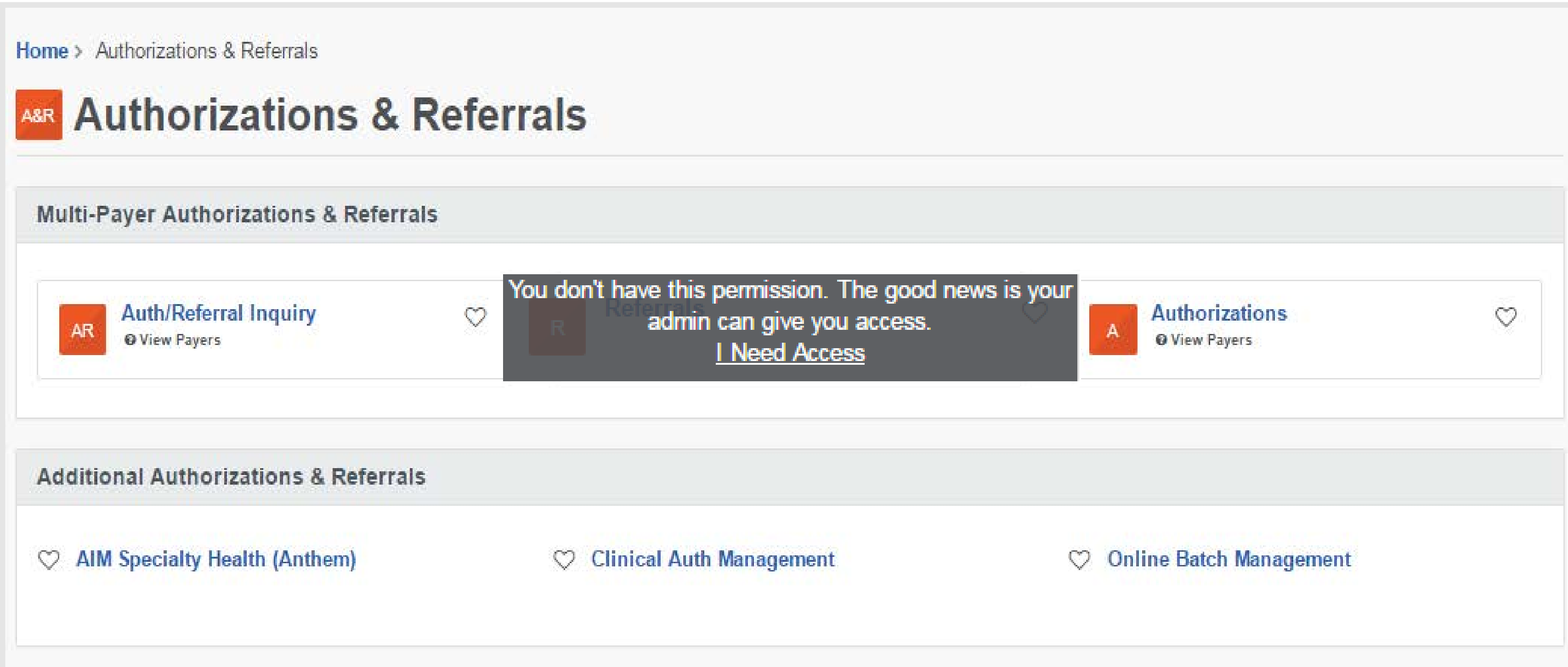
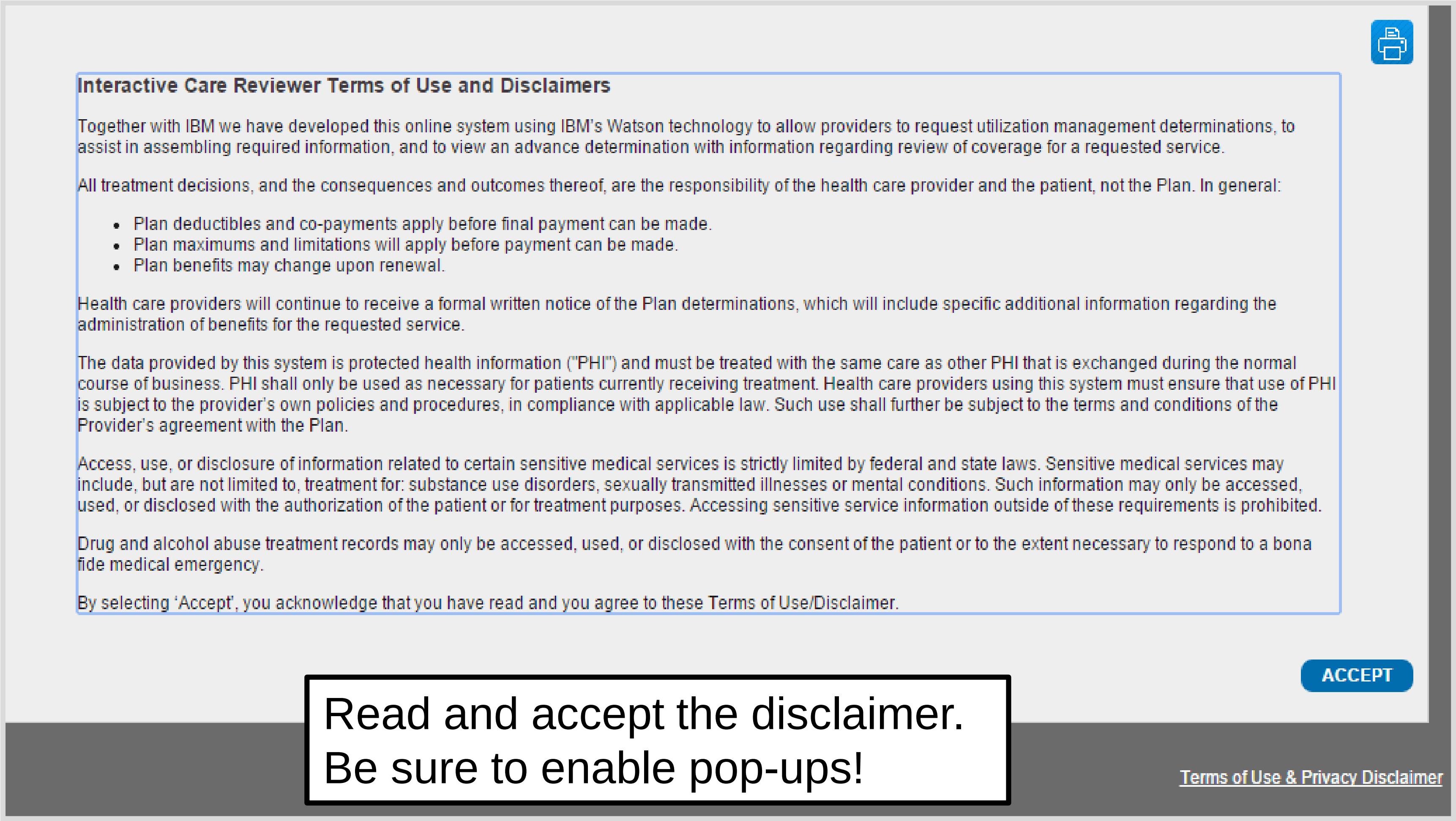
Accessing the ICR (cont.)



ICR *Terms of Use and Disclaimers*



Interactive Care Reviewer Terms of Use and Disclaimers

Together with IBM we have developed this online system using IBM's Watson technology to allow providers to request utilization management determinations, to assist in assembling required information, and to view an advance determination with information regarding review of coverage for a requested service.

All treatment decisions, and the consequences and outcomes thereof, are the responsibility of the health care provider and the patient, not the Plan. In general:

- Plan deductibles and co-payments apply before final payment can be made.
- Plan maximums and limitations will apply before payment can be made.
- Plan benefits may change upon renewal.

Health care providers will continue to receive a formal written notice of the Plan determinations, which will include specific additional information regarding the administration of benefits for the requested service.

The data provided by this system is protected health information ("PHI") and must be treated with the same care as other PHI that is exchanged during the normal course of business. PHI shall only be used as necessary for patients currently receiving treatment. Health care providers using this system must ensure that use of PHI is subject to the provider's own policies and procedures, in compliance with applicable law. Such use shall further be subject to the terms and conditions of the Provider's agreement with the Plan.

Access, use, or disclosure of information related to certain sensitive medical services is strictly limited by federal and state laws. Sensitive medical services may include, but are not limited to, treatment for: substance use disorders, sexually transmitted illnesses or mental conditions. Such information may only be accessed, used, or disclosed with the authorization of the patient or for treatment purposes. Accessing sensitive service information outside of these requirements is prohibited.

Drug and alcohol abuse treatment records may only be accessed, used, or disclosed with the consent of the patient or to the extent necessary to respond to a bona fide medical emergency.

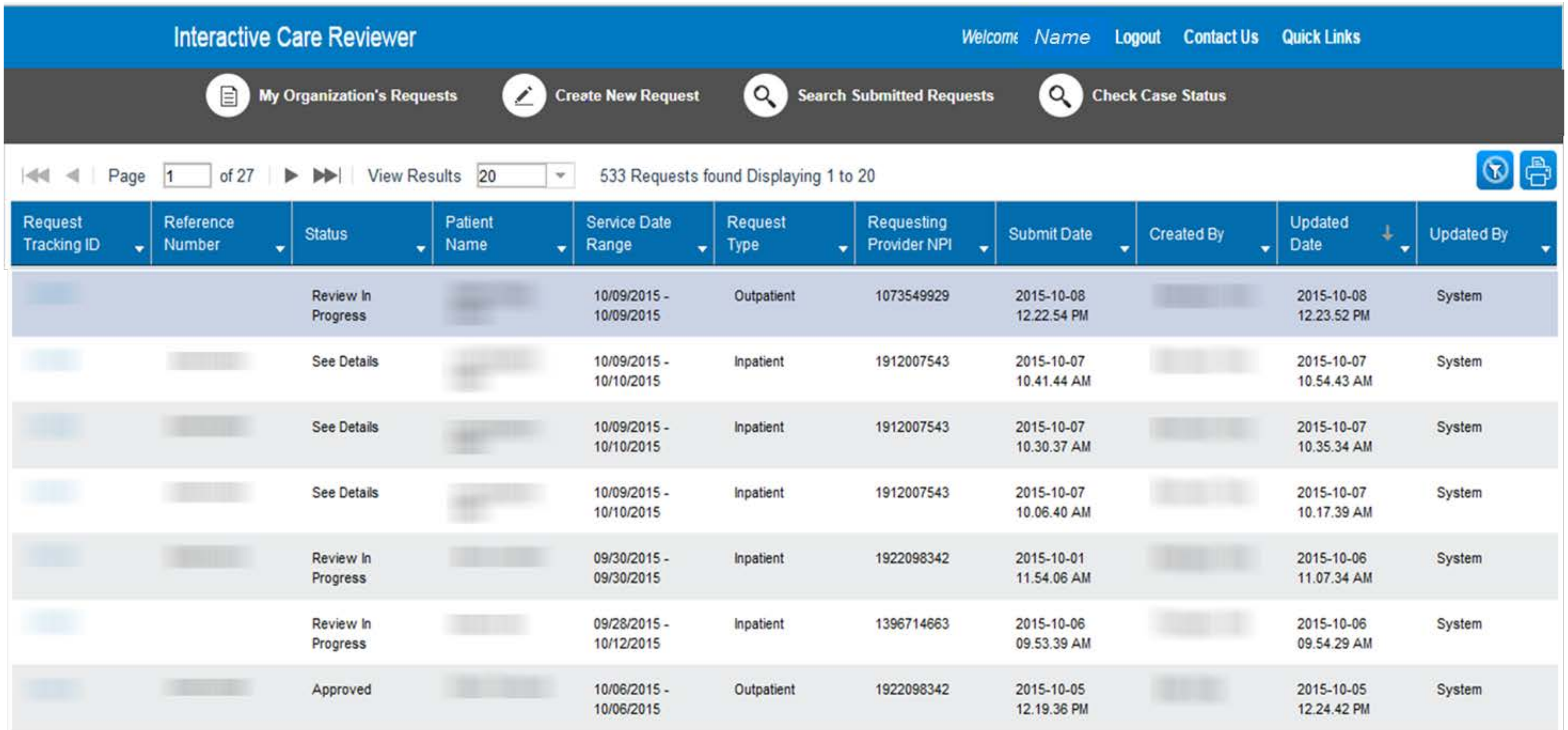
By selecting 'Accept', you acknowledge that you have read and you agree to these Terms of Use/Disclaimer.

ACCEPT

Terms of Use & Privacy Disclaimer

Read and accept the disclaimer.
Be sure to enable pop-ups!

The ICR landing page/dashboard



Request Tracking ID	Reference Number	Status	Patient Name	Service Date Range	Request Type	Requesting Provider NPI	Submit Date	Created By	Updated Date	Updated By
		Review In Progress		10/09/2015 - 10/09/2015	Outpatient	1073549929	2015-10-08 12.22.54 PM		2015-10-08 12.23.52 PM	System
		See Details		10/09/2015 - 10/10/2015	Inpatient	1912007543	2015-10-07 10.41.44 AM		2015-10-07 10.54.43 AM	System
		See Details		10/09/2015 - 10/10/2015	Inpatient	1912007543	2015-10-07 10.30.37 AM		2015-10-07 10.35.34 AM	System
		See Details		10/09/2015 - 10/10/2015	Inpatient	1912007543	2015-10-07 10.06.40 AM		2015-10-07 10.17.39 AM	System
		Review In Progress		09/30/2015 - 09/30/2015	Inpatient	1922098342	2015-10-01 11.54.06 AM		2015-10-06 11.07.34 AM	System
		Review In Progress		09/28/2015 - 10/12/2015	Inpatient	1396714663	2015-10-06 09.53.39 AM		2015-10-06 09.54.29 AM	System
		Approved		10/06/2015 - 10/06/2015	Outpatient	1922098342	2015-10-05 12.19.36 PM		2015-10-05 12.24.42 PM	System

The dashboard displays requests submitted, requests not yet submitted, cases requiring additional information and cases where a decision has been rendered.

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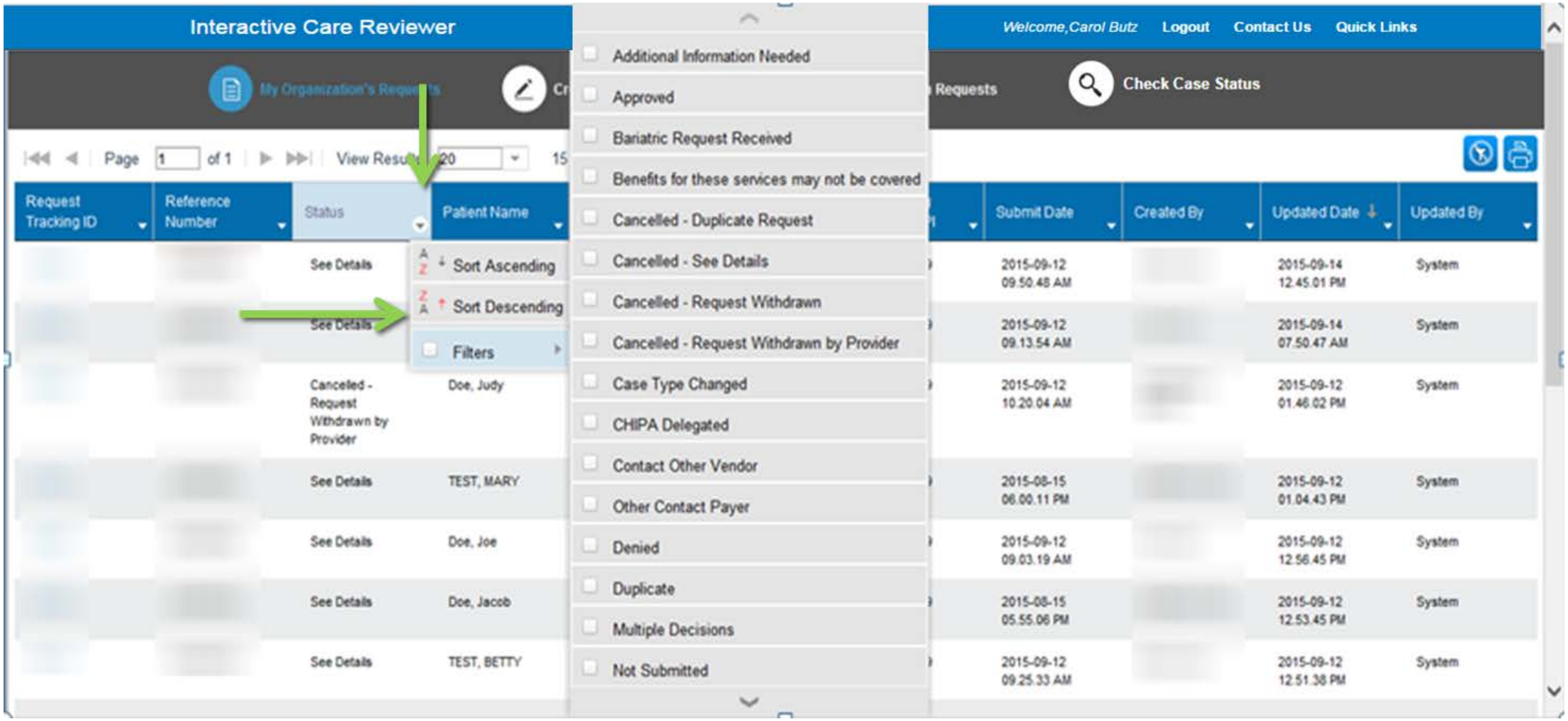
The ICR landing page/dashboard (cont.)



All columns have up and down arrows for quick sorting. Some also have a filter option (shown here).

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ICR dashboard tabs

Tabs across the top of the dashboard:

- **My Organization's Requests** is the home page of the application and displays the dashboard.
- **Create New Request** is used to start a new inpatient or outpatient request.
- **Search Organization Requests** allows for the ability to search for any ICR case requested by your organization or any request with which your organization is associated. This includes requests with a status of *review not required*.

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ICR dashboard tabs (cont.)

- **Check Case Status** allows for the ability to view any cases submitted associated with the tax ID(s) on the request. This includes submissions by phone, fax, etc.

Note: In order to view the authorization/referral, the case must be associated with the tax ID listed under the organization you selected in the Availity Portal.

Creating a new request

Creating a new request

Do you want to verify if an authorization is required? The ICR gives you quick access to that information in most cases. Enter:

- Patient information.
- Diagnosis and procedure information.
- Provider details.

A message will appear indicating whether or not an authorization is required for most requests. This information can be printed or saved to a PDF and is available later via an ICR search.

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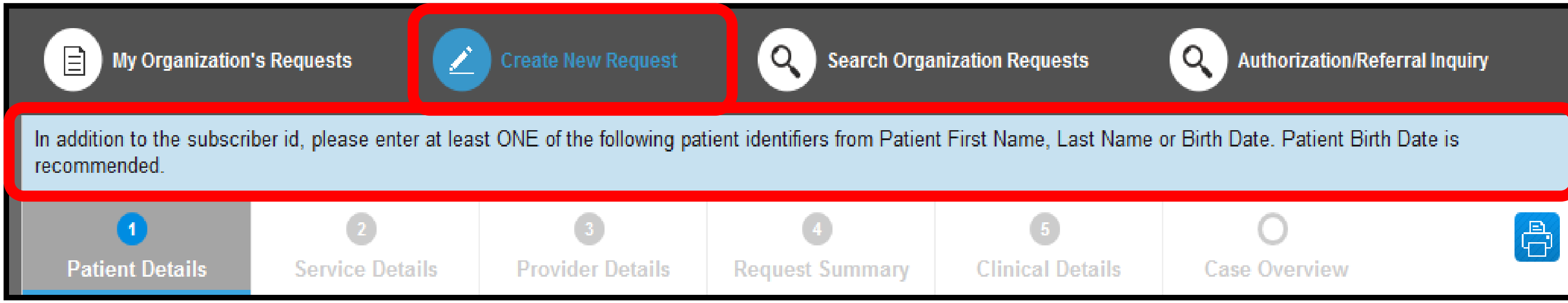
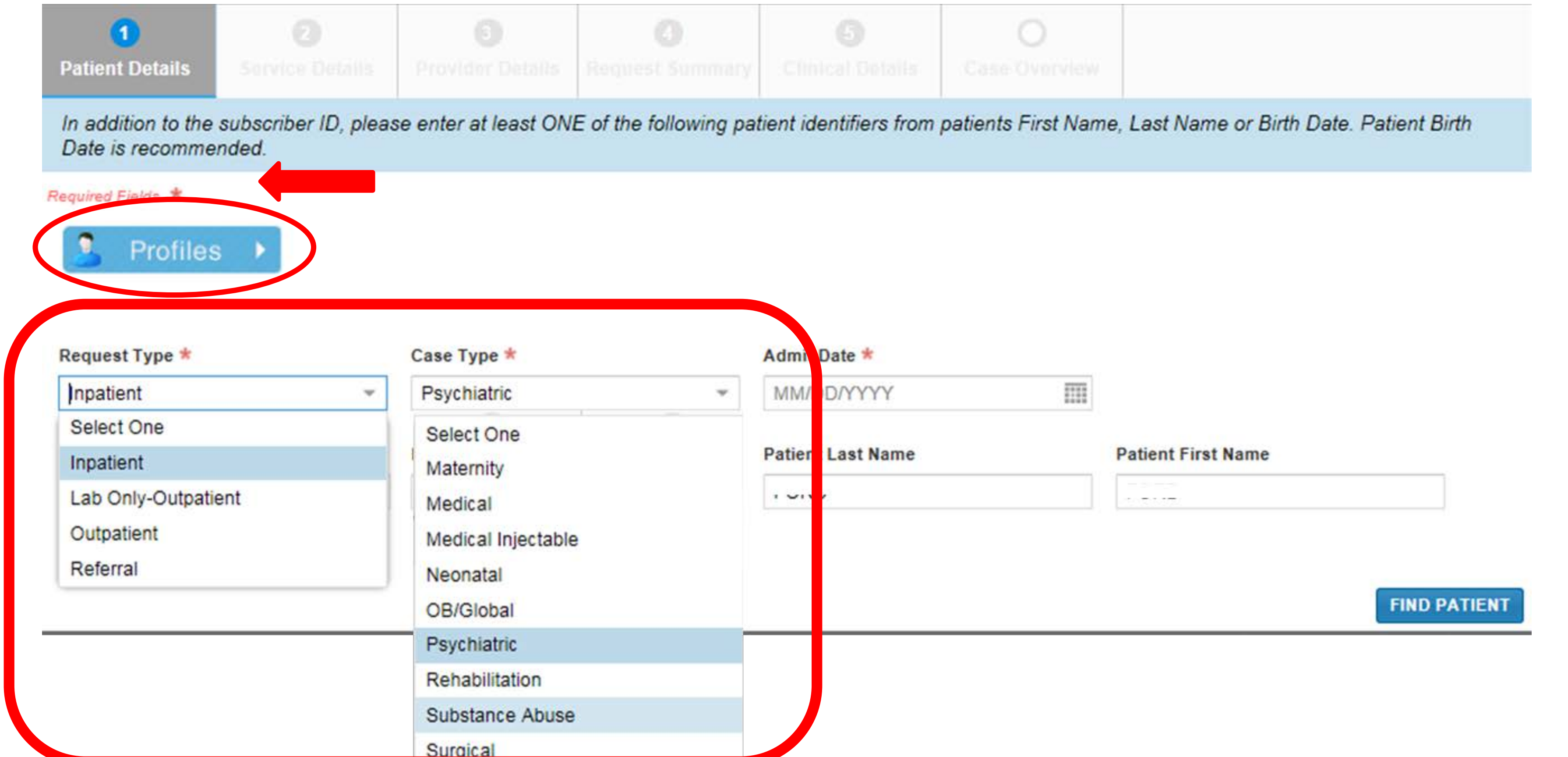
Starting a new request on the ICR



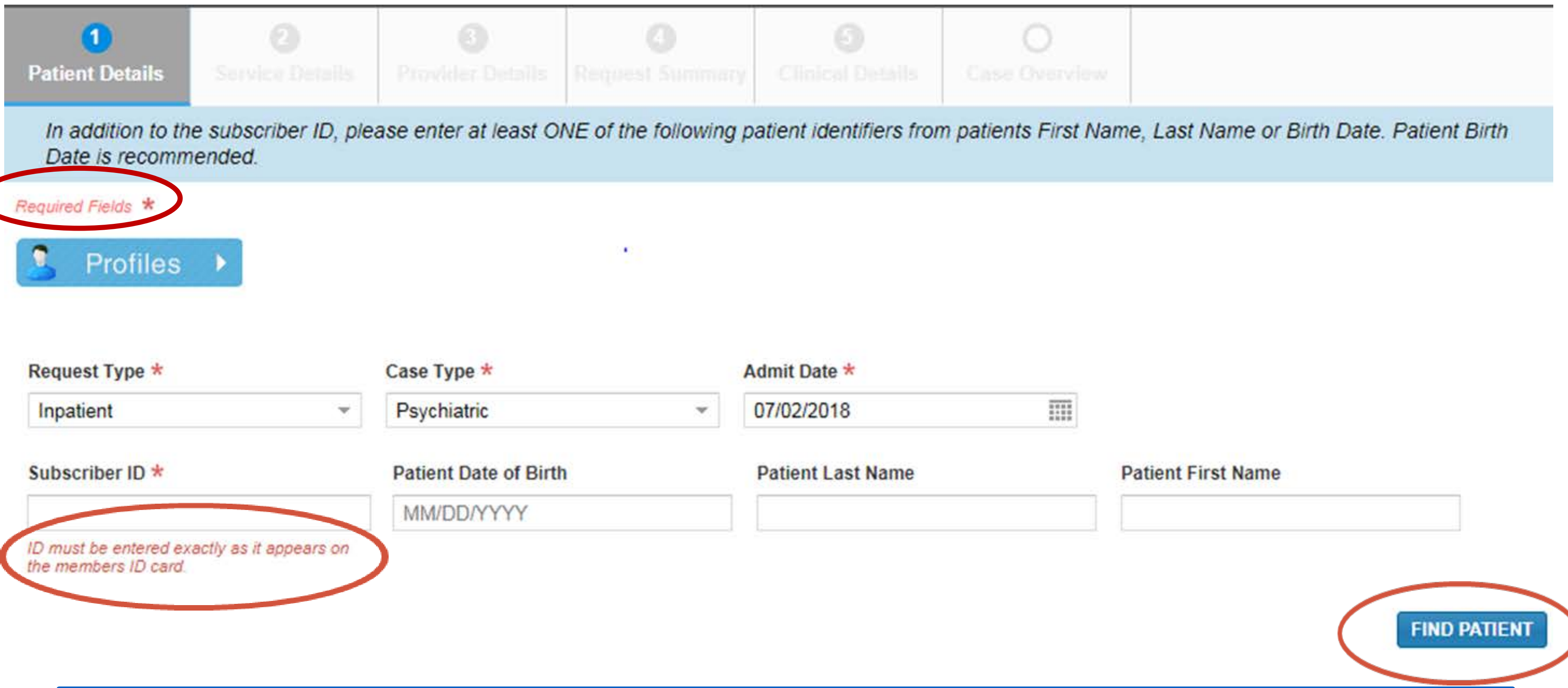
- Select **Create New Request** from the ICR dashboard tab.
- Watch the blue bar for messaging. Errors turn the box red.
- Menu bar shows where you are.

Patient details



Select from the *Request Type* and *Case Type* menus or save steps by selecting **Profiles**.

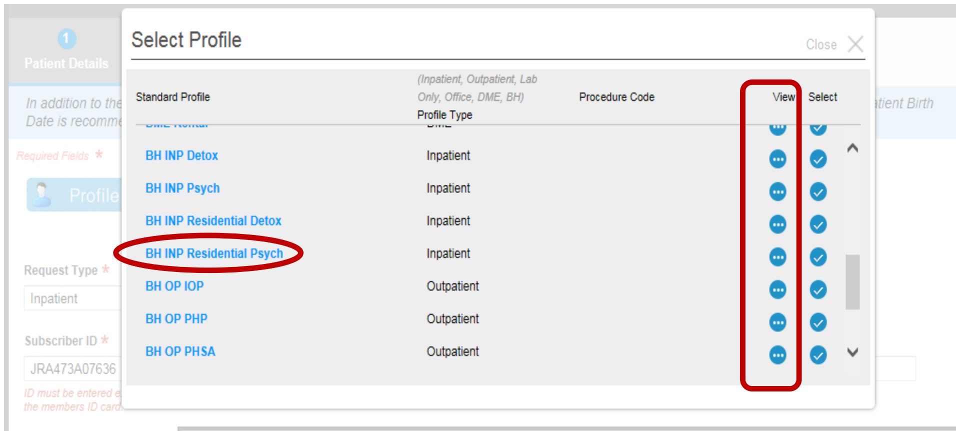
Patient details (cont.)



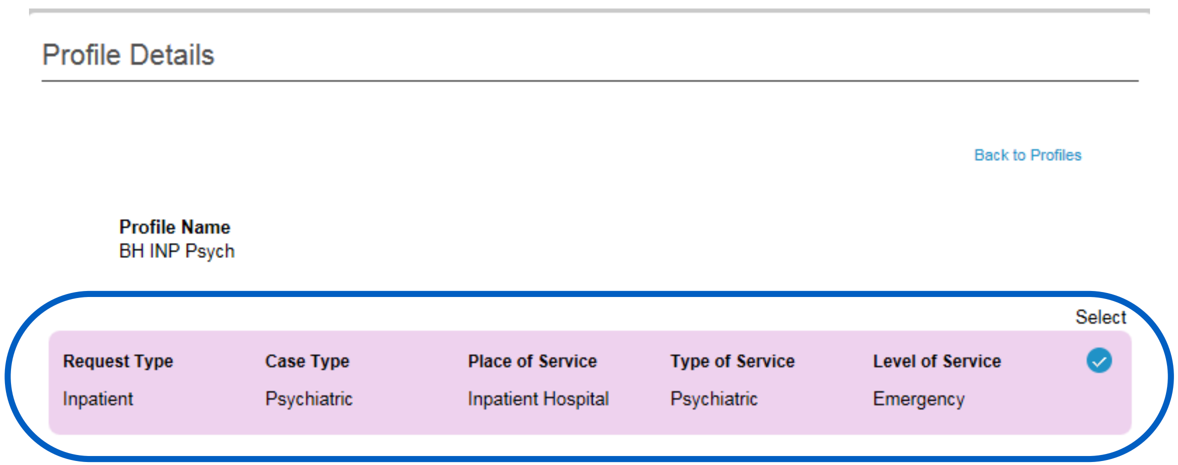
Complete all required fields, then select **Find Patient**.

Profile templates

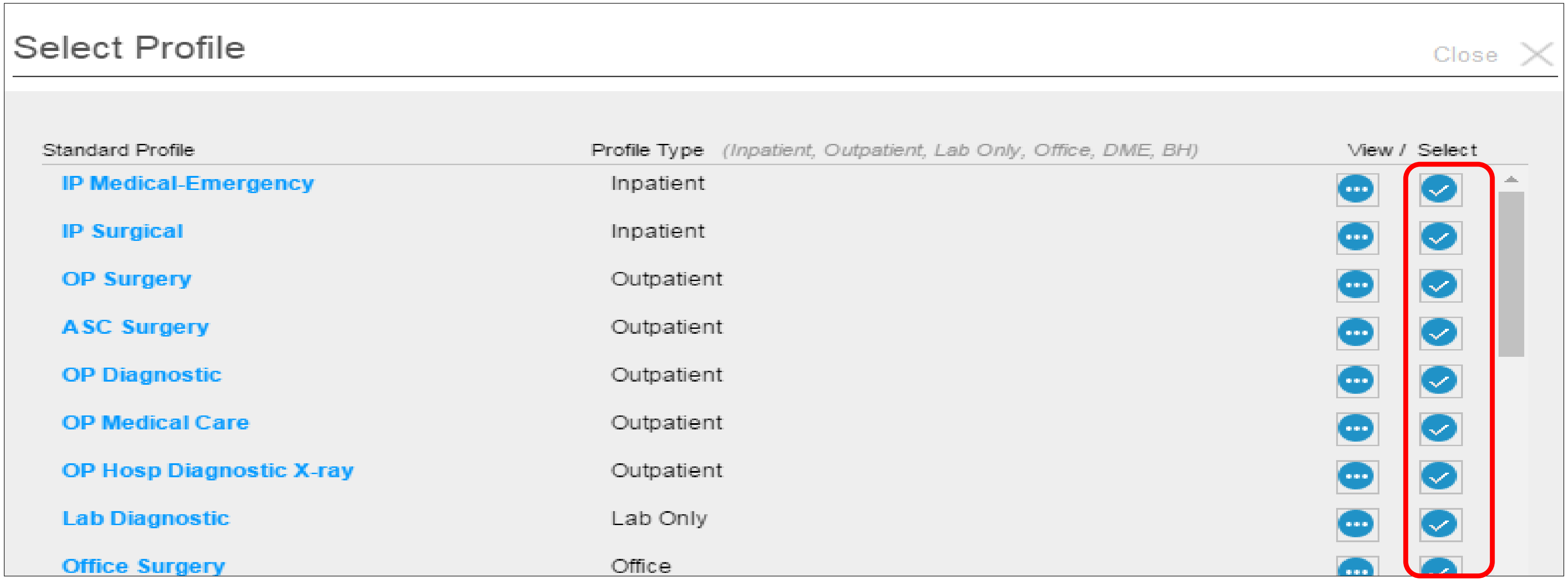
Click on the dot to view the *Standard Profile*.



Users will be able to see what will be populated on the *Patient Details* screen and on the *Service Details* screen.

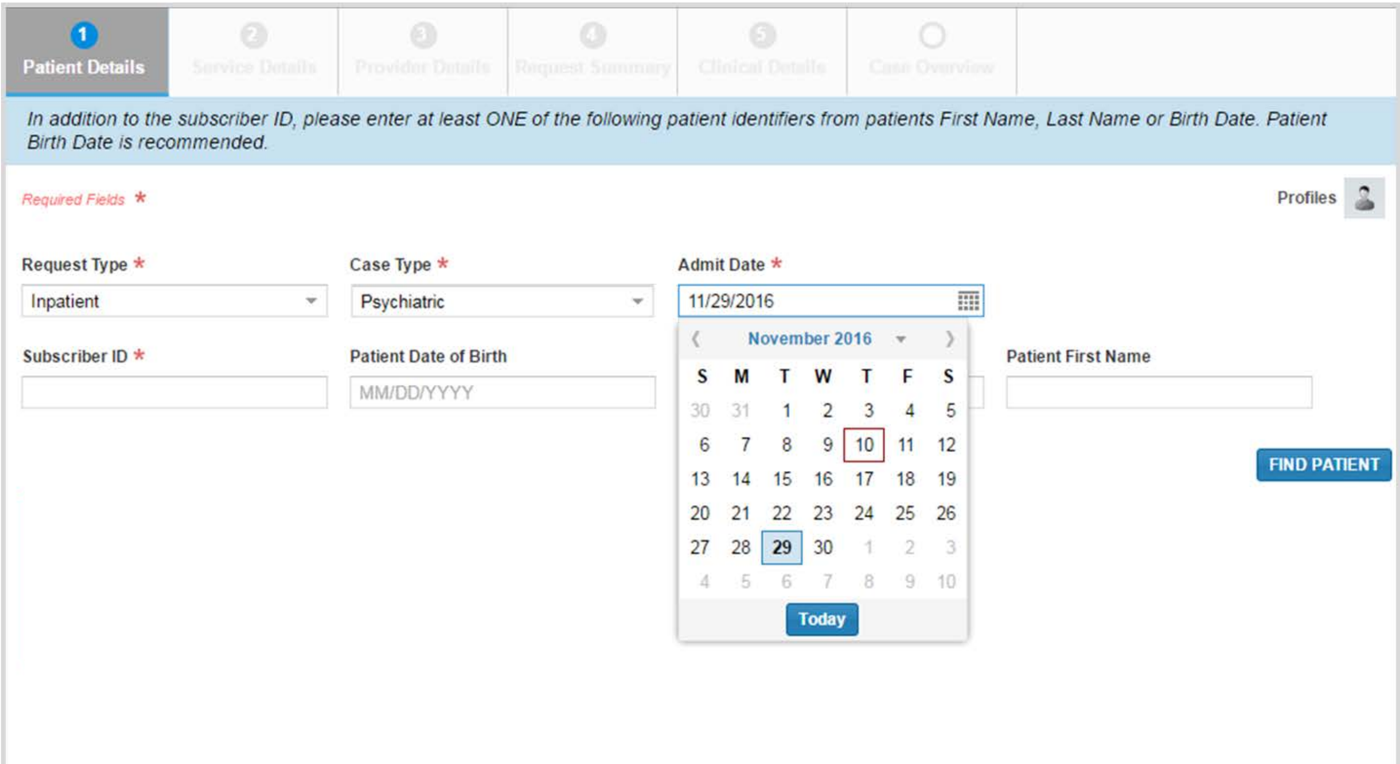


Profile templates (cont.)



Select the check mark to select a standard profile. This action will populate the mandatory *Request Type* and *Case Type* fields on the *Patient Details* screen and *Place of Service*, *Type of Service,* and *Level of Service* on the *Service Details* screen.

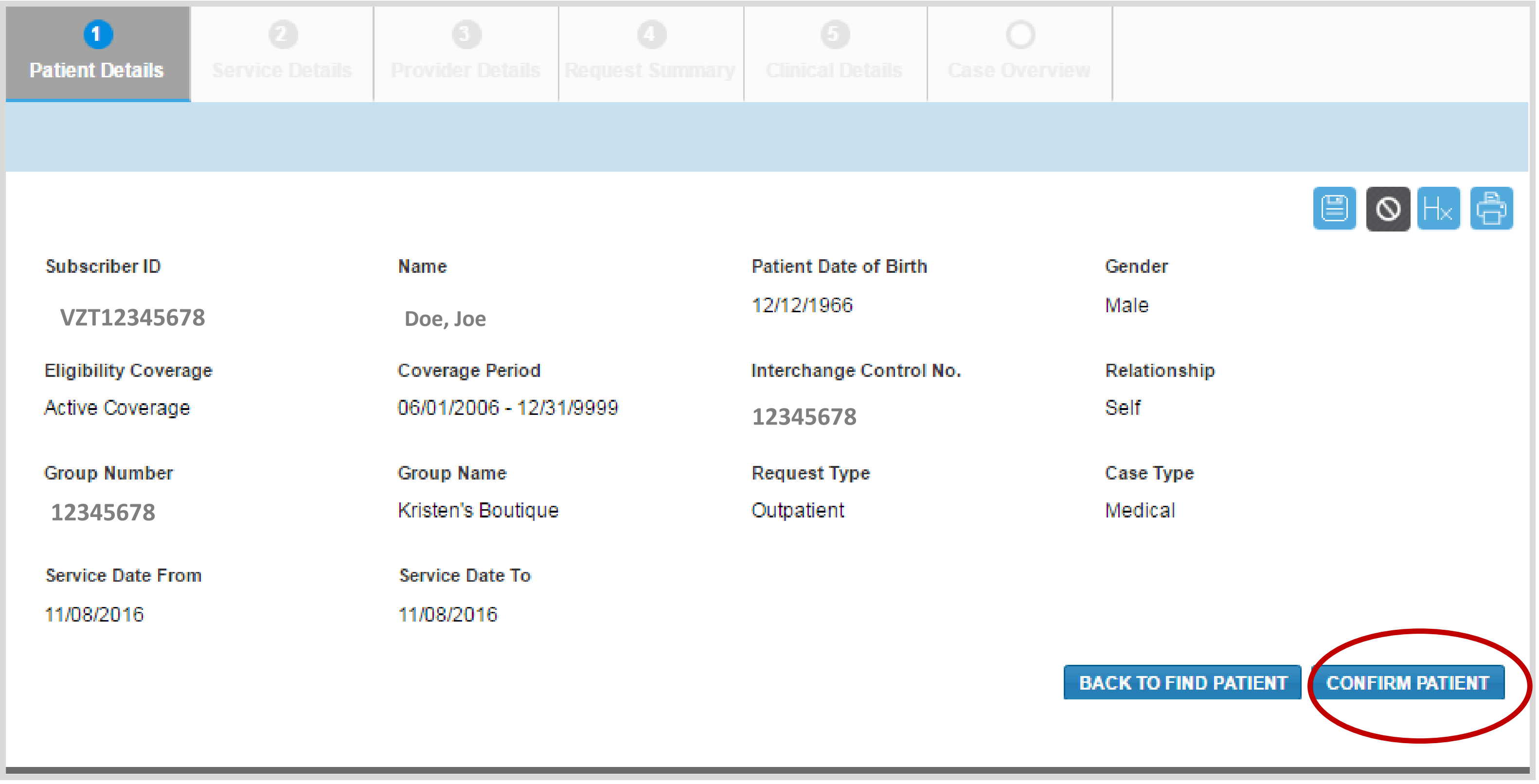
Patient details: date of service (inpatient — admit date)



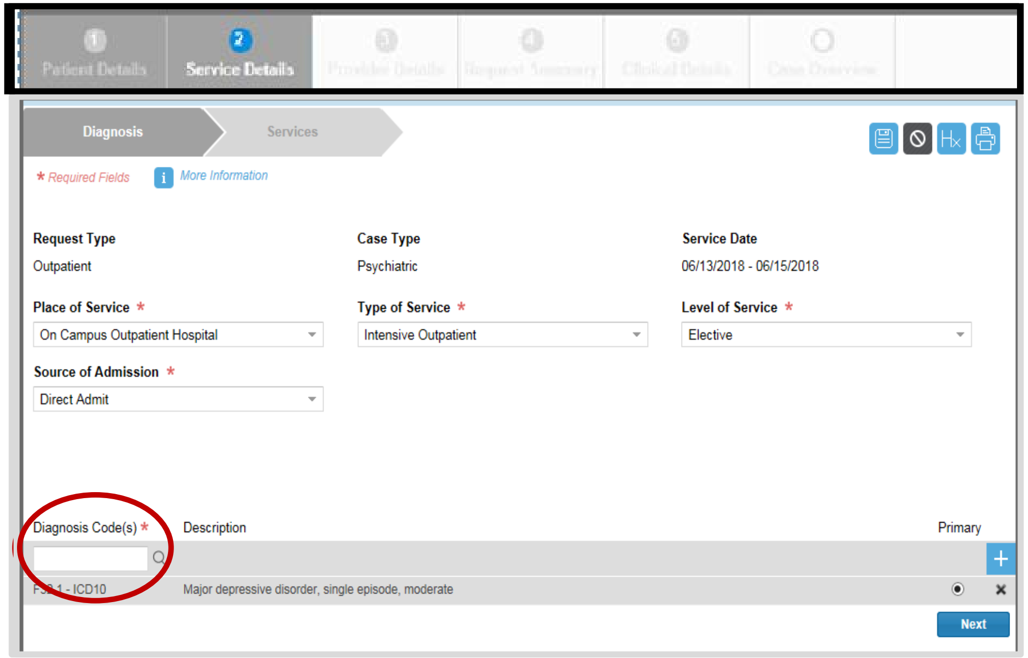
The admit date **cannot** be changed once the case is submitted!

Patient details

A message in the blue bar will indicate if the member's preauthorization cannot be completed using the ICR.

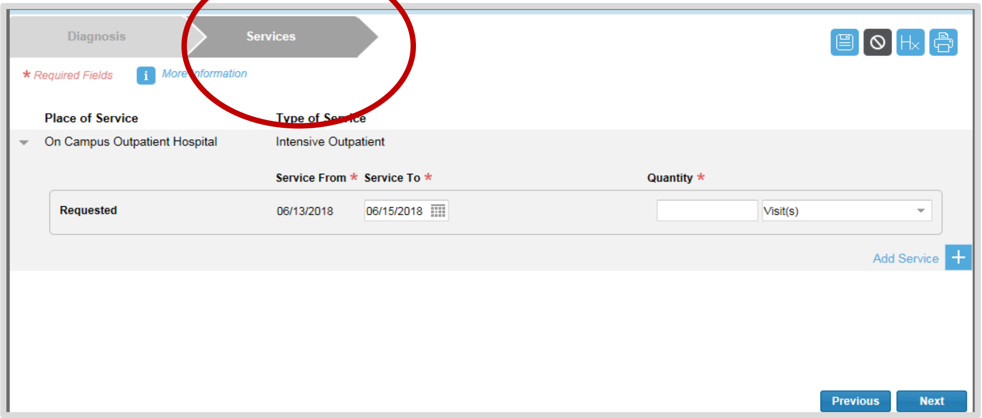


Service details (outpatient examples)



1

Complete diagnosis fields.



2

Complete services fields.

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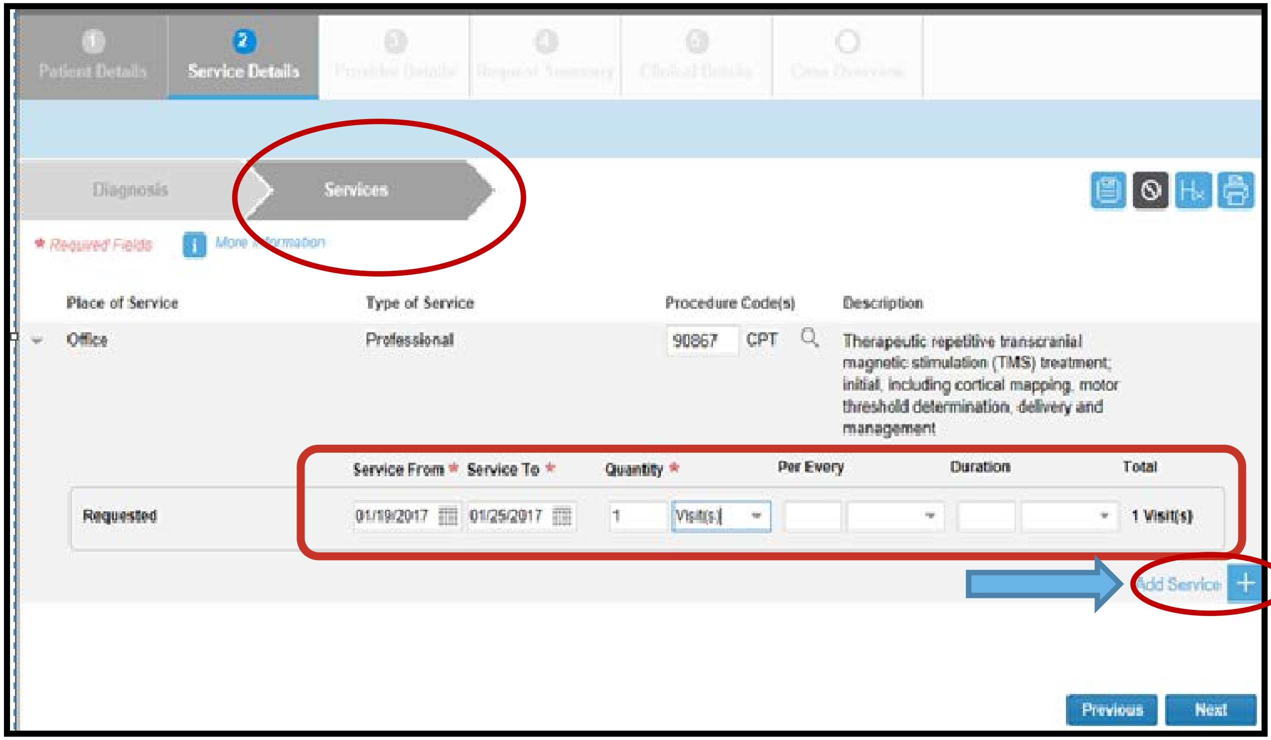
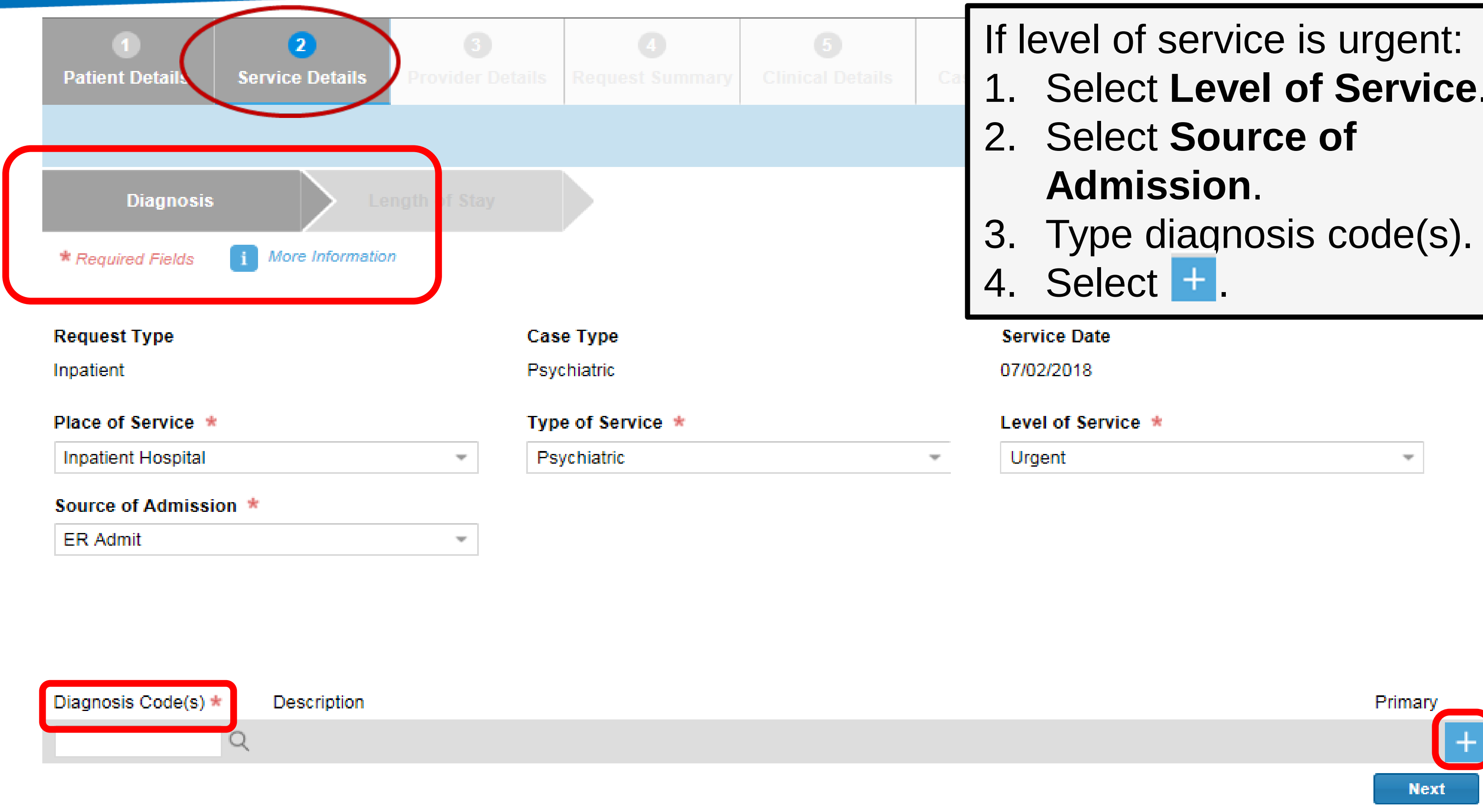
Service details (outpatient examples)



Select plus sign again to enter that procedure to case before selecting the **Next** button.

Service details: diagnosis (inpatient)



If level of service is urgent:

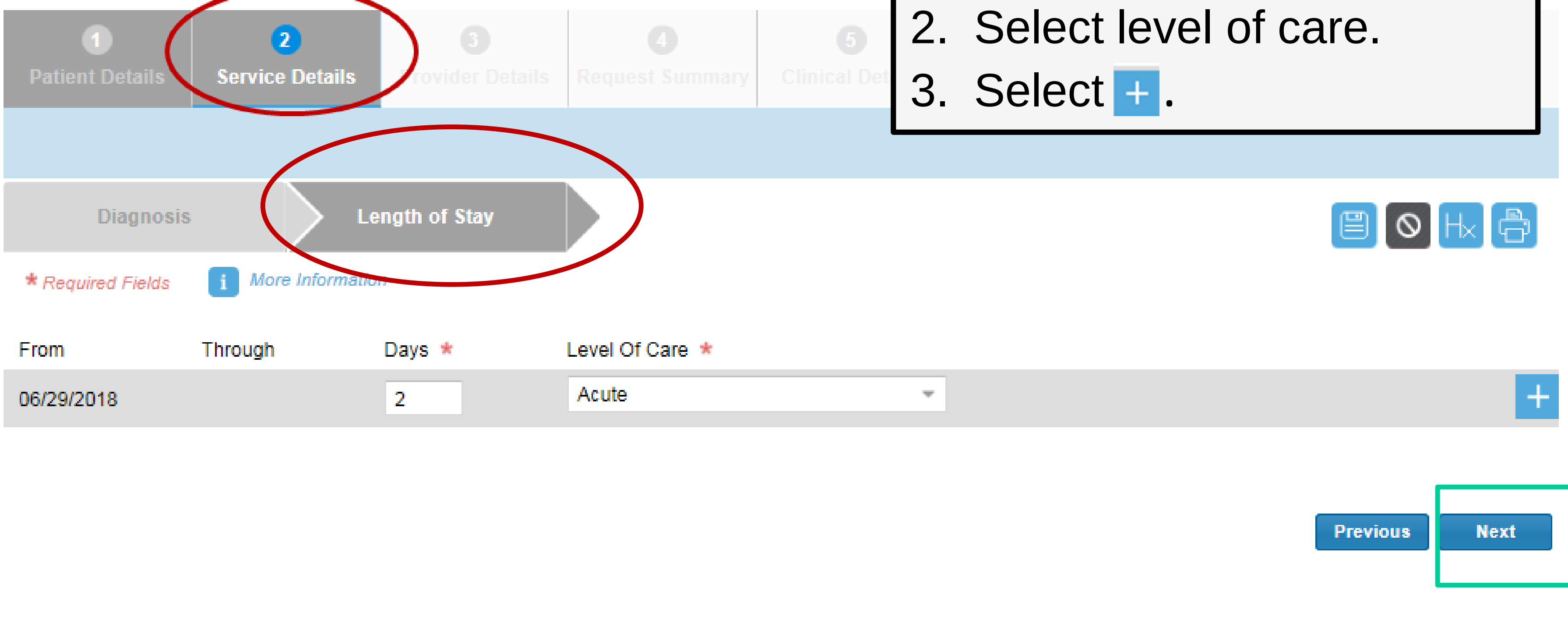
1. Select **Level of Service**.
2. Select **Source of Admission**.
3. Type diagnosis code(s).
4. Select +.

Urgent level of service is only an option for a future admission. If the date of admission is the current date (or in the past), options are elective and emergency.

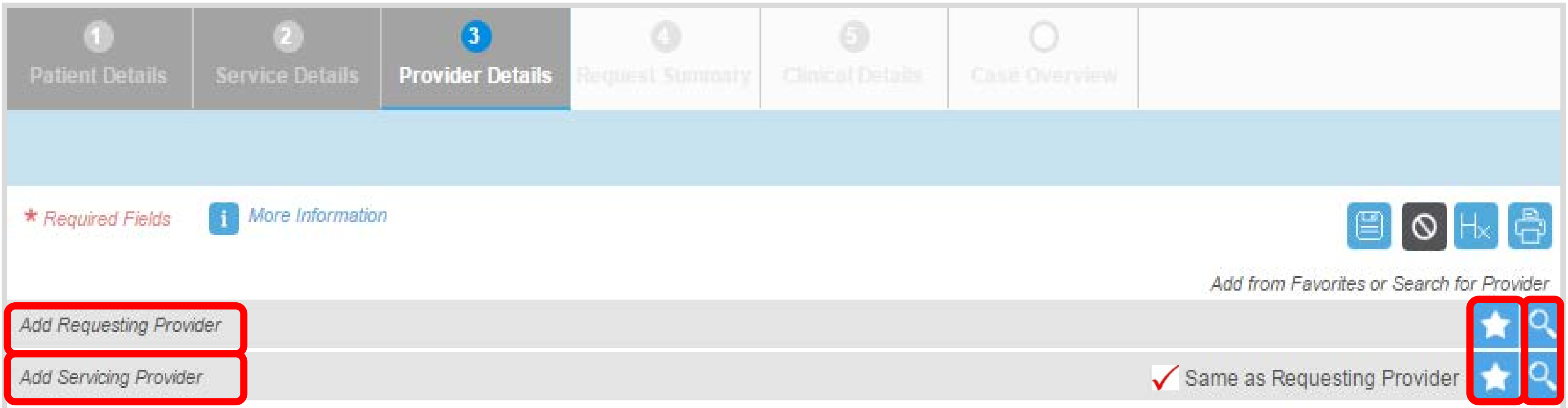
Service details: length of stay (inpatient)

Length of stay:

1. Type number of days.
2. Select level of care.
3. Select +.



Provider details

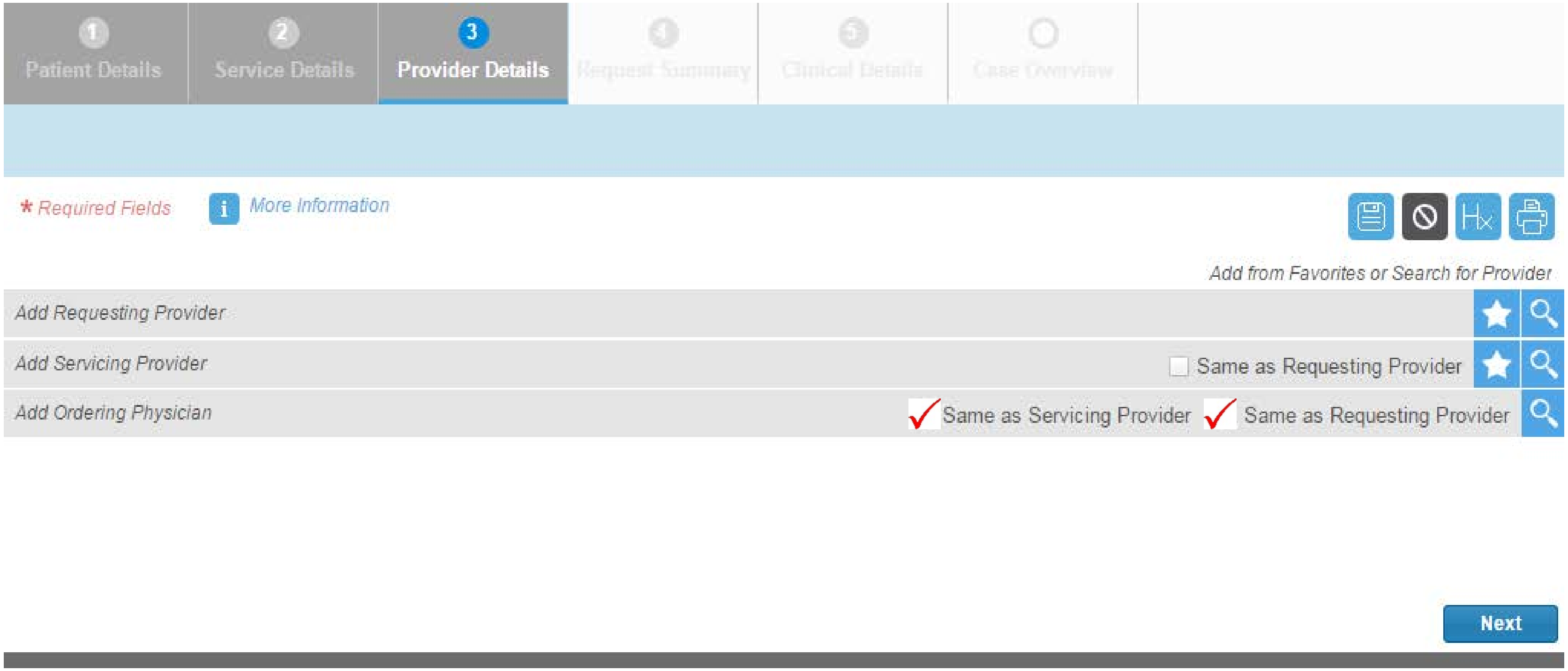


Complete required fields for all sections.

Search all or select from favorites.

Next

Ordering provider



The *Ordering Provider Information* section appears for some specific outpatient requests. Examples include: *Place of Service — Home* or *Type of Service — Diagnostic Lab*, *Dialysis*, *Durable Medical Equipment*, *Home Health Care*, *Physical Therapy*, *Radiation Therapy*.

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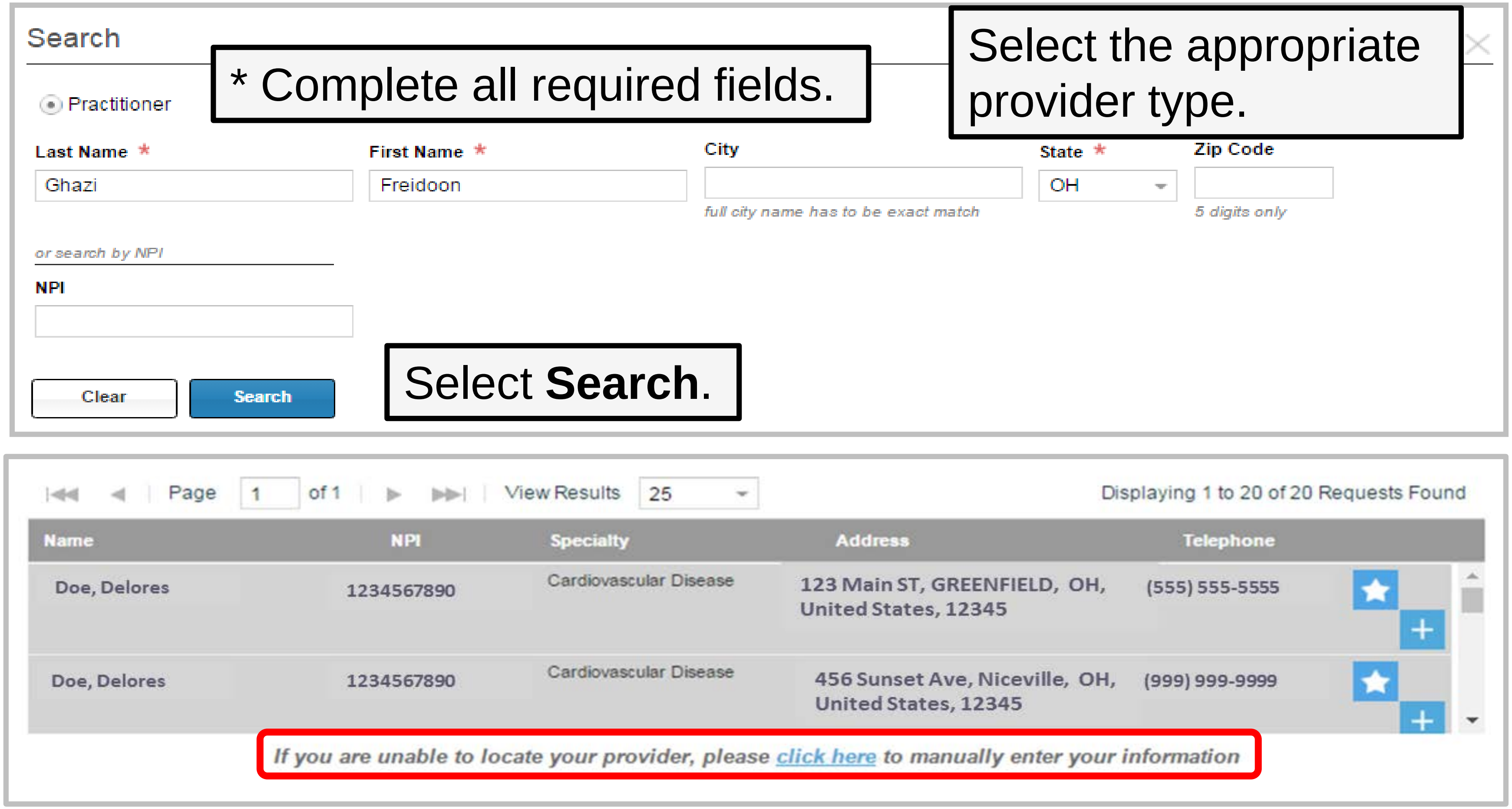
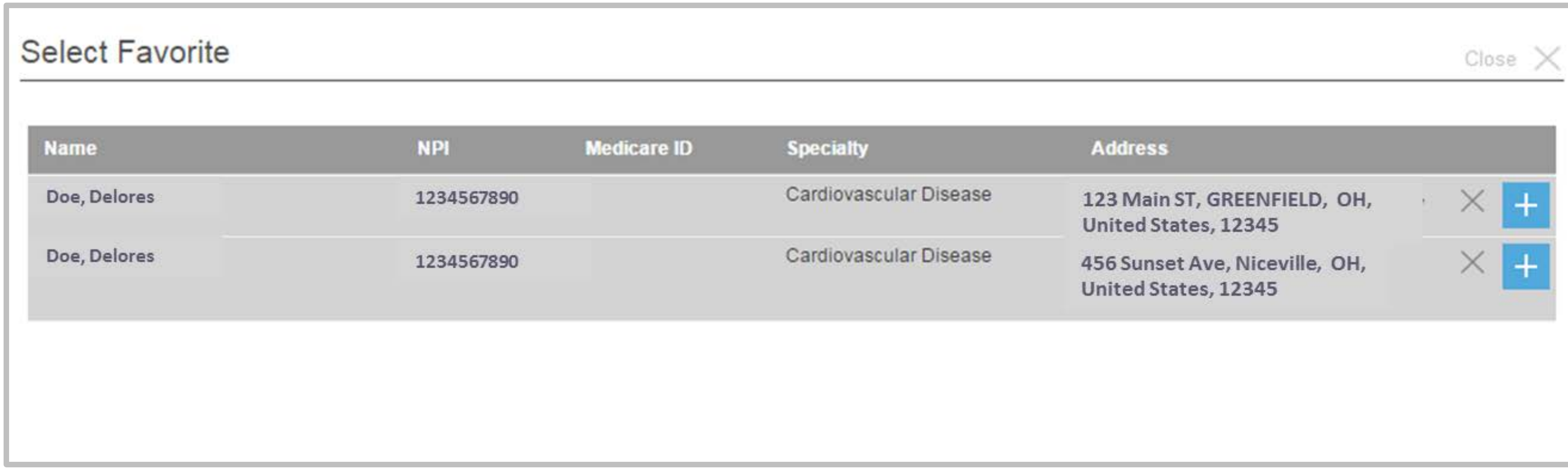
Provider details



Favorites



Select Favorite

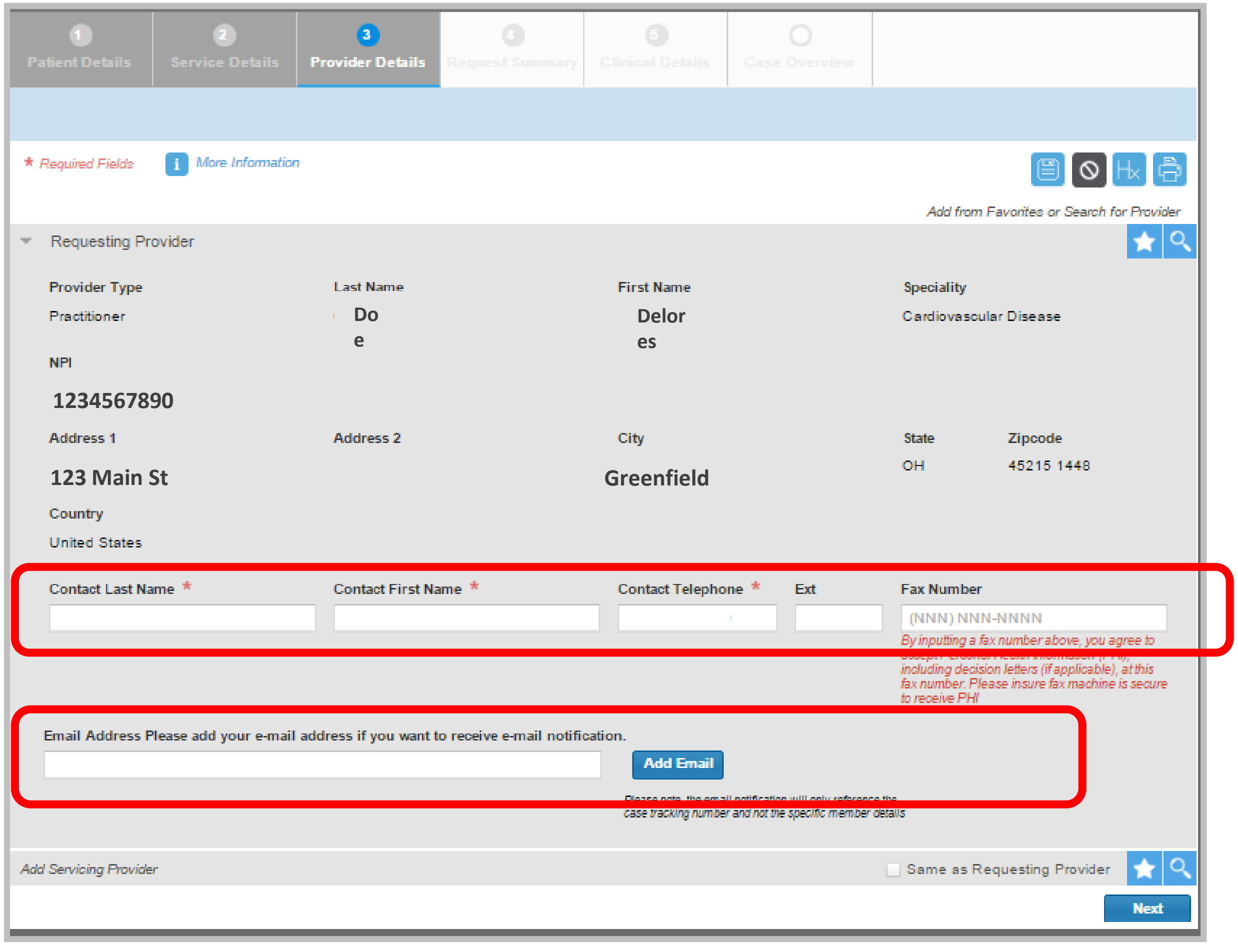
Close

Name	NPI	Medicare ID	Specialty	Address
Doe, Delores	1234567890		Cardiovascular Disease	123 Main ST, GREENFIELD, OH, United States, 12345
Doe, Delores	1234567890		Cardiovascular Disease	456 Sunset Ave, Niceville, OH, United States, 12345

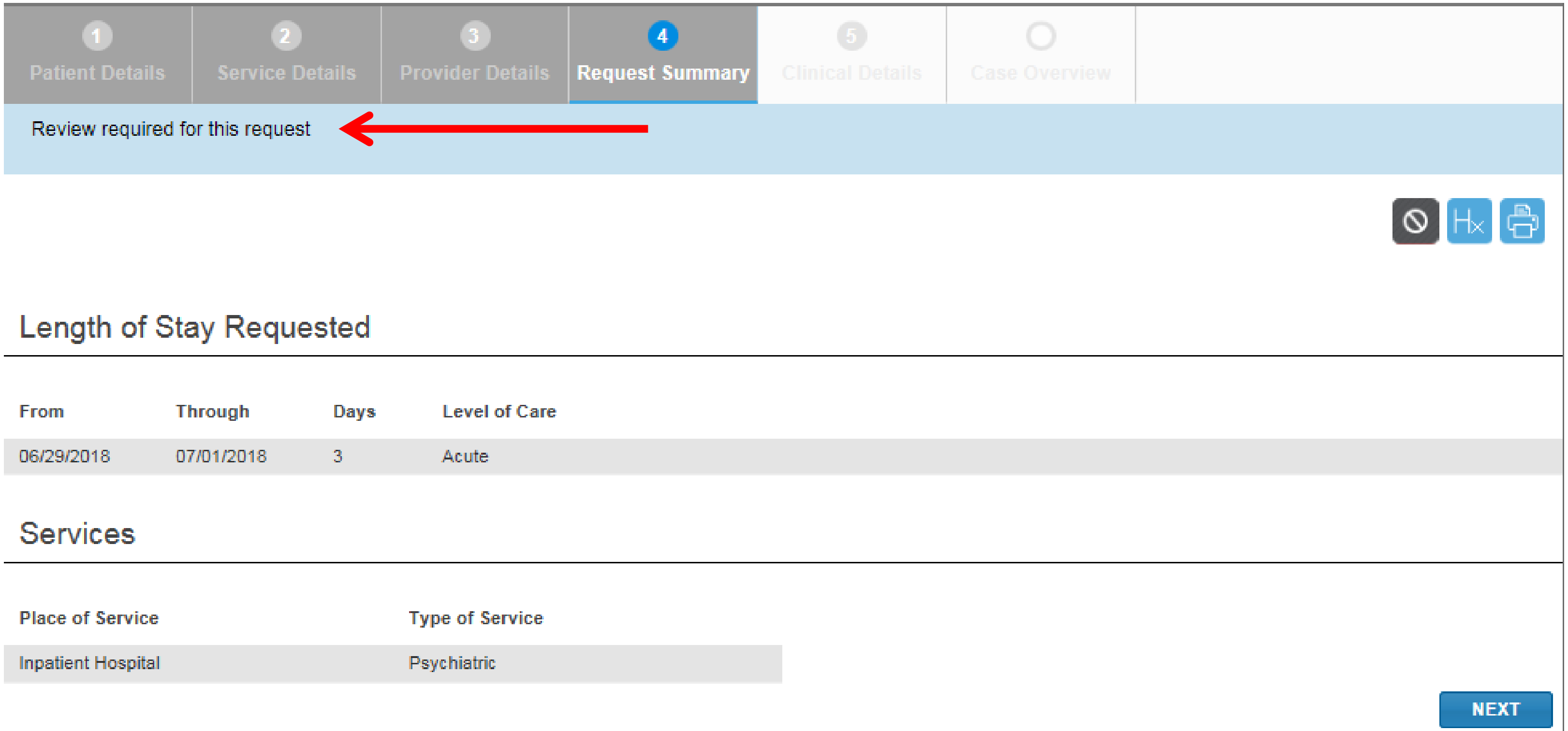
ICR allows providers to save up to 25 favorites for:

- Requesting providers.
- Servicing providers.
- Facility durable medical equipment providers.
- Refer to providers.

Provider details: contact information

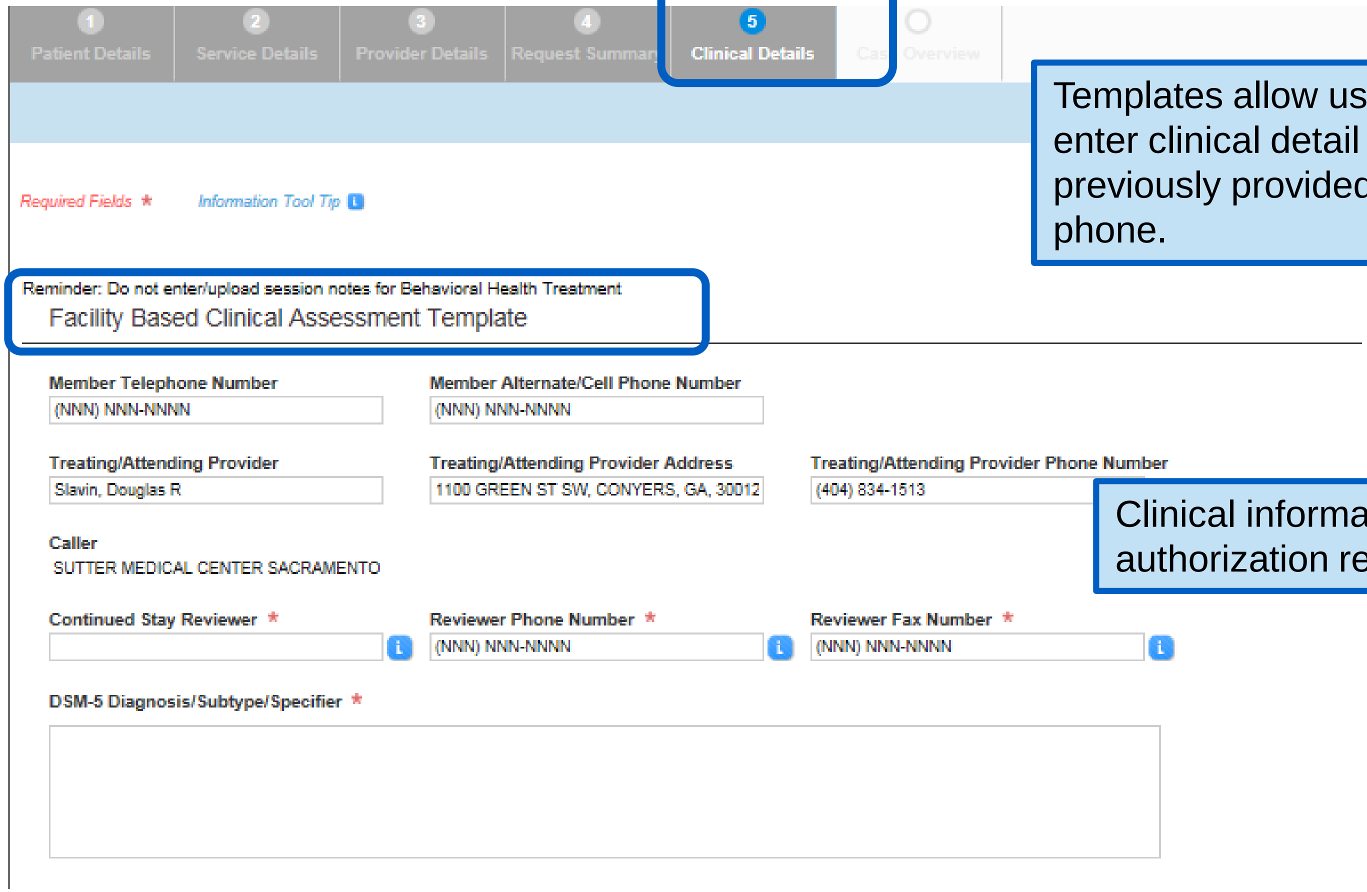


Request summary



The *Request Summary* page is where users will be able to verify whether the services require prior authorization. If the services do not require precertification, users can note the tracking ID and close out the request. If users need to search for it later, they can locate the request by the tracking ID or patient information.

Clinical details: provider form



Templates allow users to enter clinical detail previously provided via phone.

Clinical information is mandatory for **all** authorization requests.

Complete all required fields * on the template.

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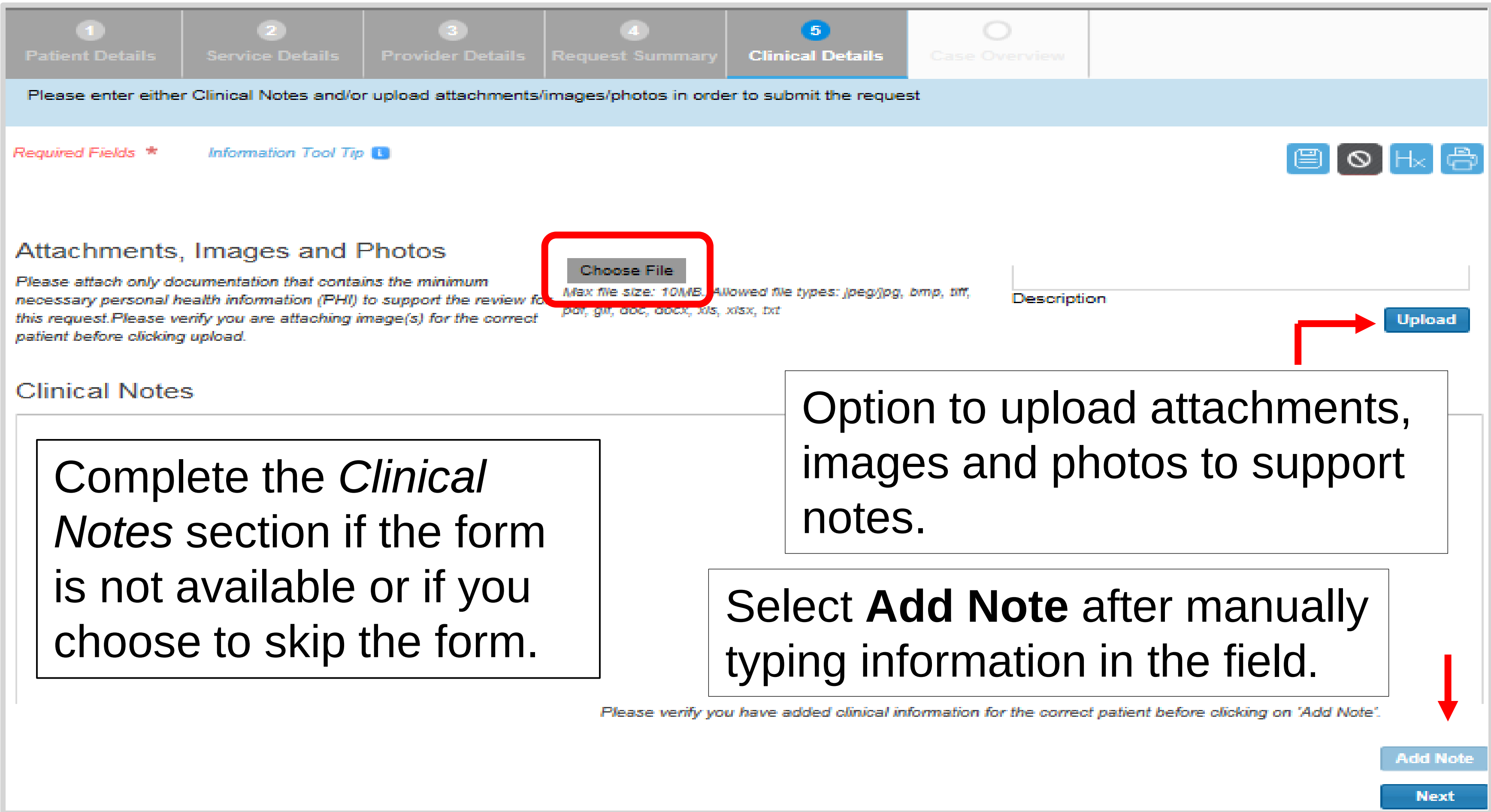
Clinical details: provider form (cont.)



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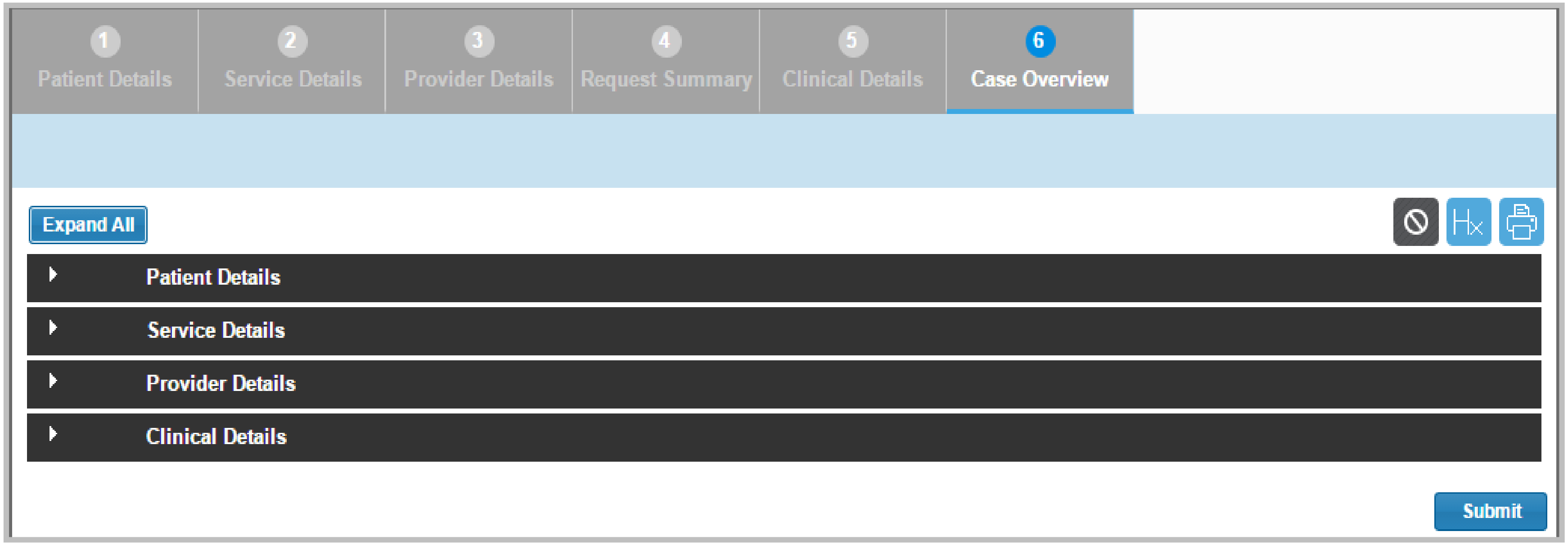
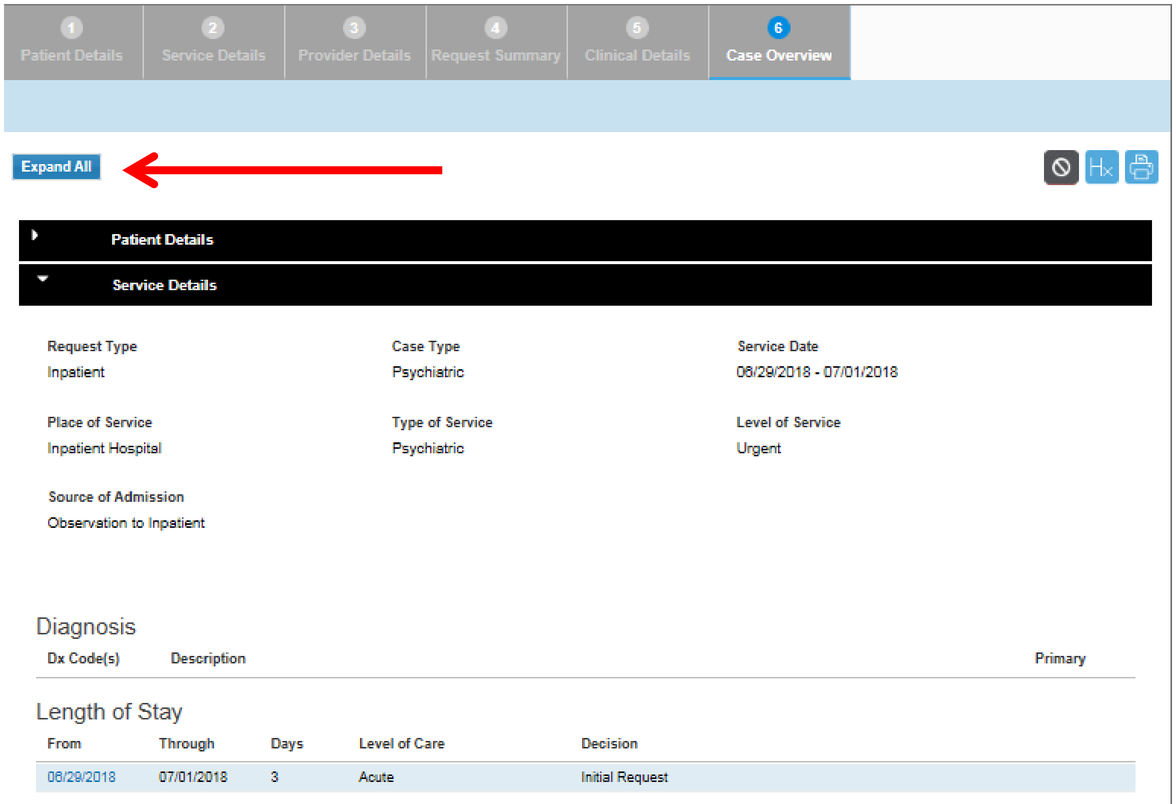
Case overview



View all details of the request entered before submitting.

Case overview (cont.)

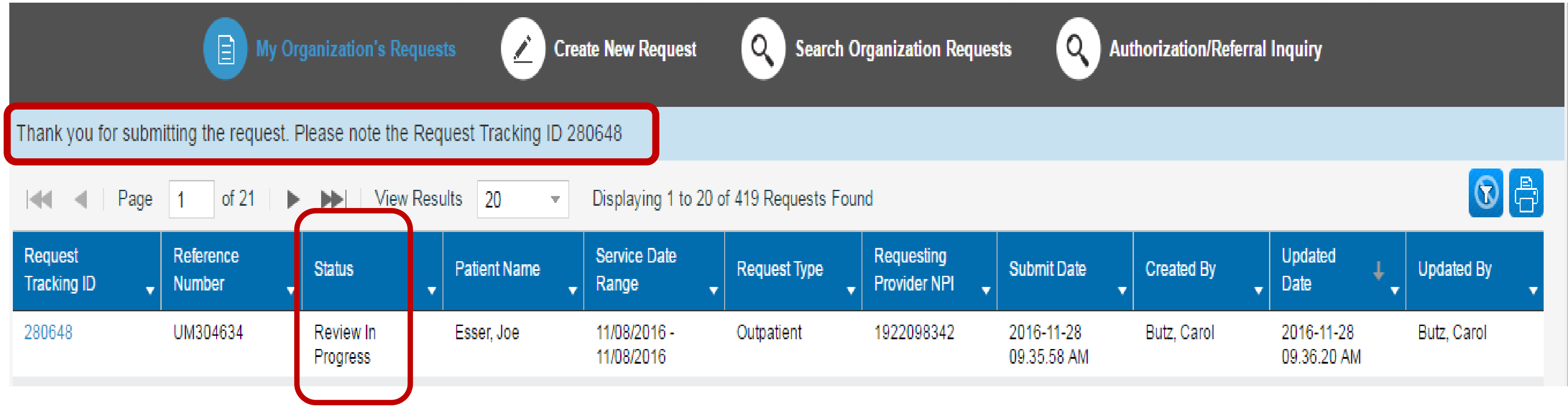


Select **Expand All** to review all sections.

Select the arrow to expand one section.

To modify information, select the title of the page to go back and edit fields. Select **Submit** to do the final submission of the request.

Submitted request in ICR



Once a request has been submitted, the dashboard will appear and the new request will be viewable at the top with a *Review In Progress* status. Confirmation that it was submitted and the tracking ID will be viewable in the blue bar.

Viewing a decision — inpatient or outpatient

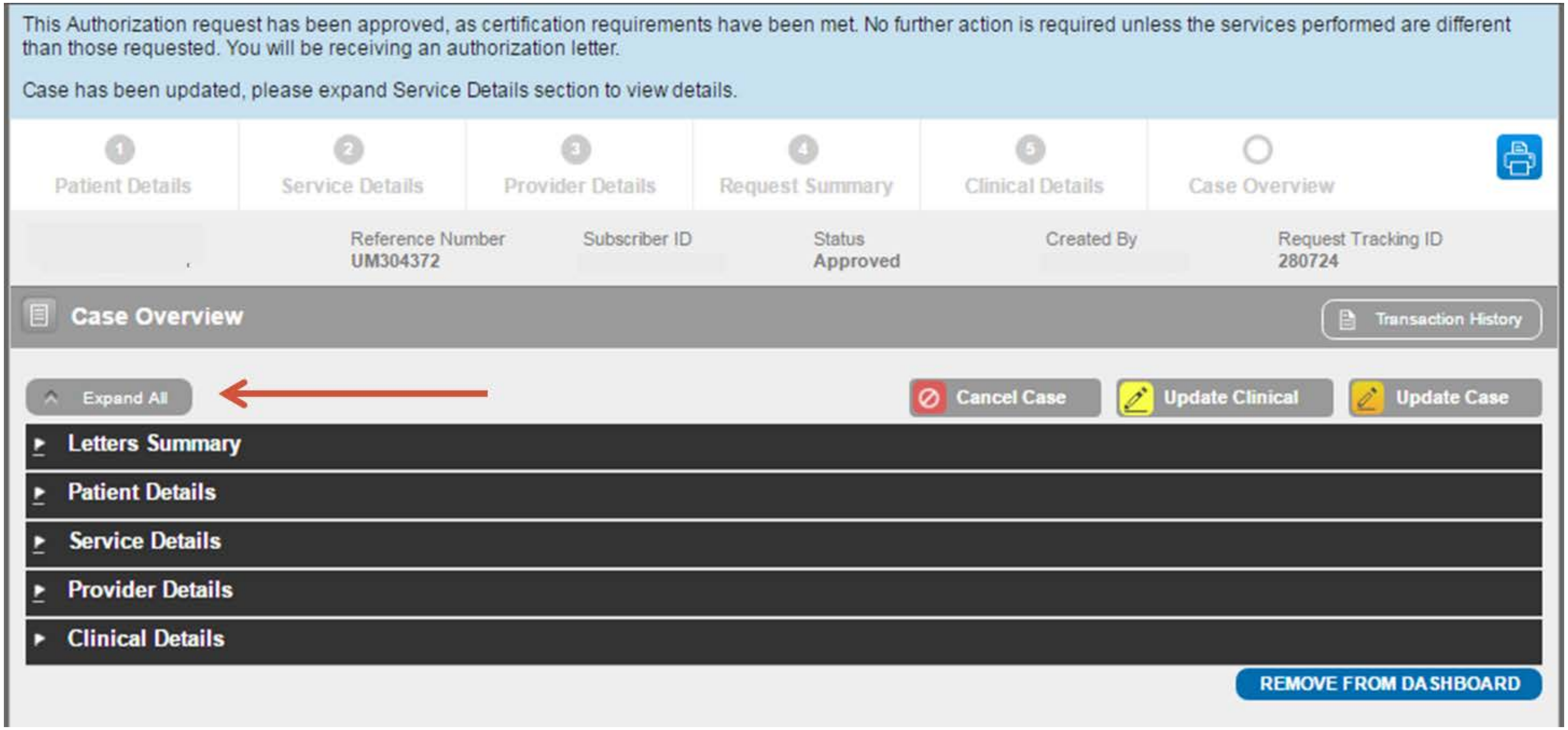
My Organization's Requests | Create New Request | Search Submitted Requests | Check Case Status

Page 3 of 21 | View Results 20 | Displaying 41 to 60 of 419 Requests Found

Request Tracking ID	Reference Number	Status	Patient Name	Service Date Range	Request Type	Requesting Provider NPI	Submit Date	Created By	Updated Date	Updated By
280772	UM304398	Approved	Mouse, Mick	1/14/2016 - 1/14/2016	Outpatient	1982718490	2016-11-14 03.31.46 PM	Jackson, Jill	2016-11-14 03.31.51 PM	Jackson, Jill
280771	UM304397	Approved	Sick, Patience	11/14/2016 - 11/14/2016	Outpatient	1225158454	2016-11-14 03.19.04 PM	Nurse, Jane	2016-11-14 03.19.09 PM	System
280765	UM304391	Review In Progress	Doe, John	11/11/2016 - 11/11/2016	Outpatient	1922098342	2016-11-11 06.13.24 PM	Jackson, Jill	2016-11-11 06.13.29 PM	Jackson, Jill
280764	UM304390	Partial Decision	Duck, Donald	11/11/2016 - 11/11/2016	Outpatient	1871558510	2016-11-11 06.02.15 PM	Smith, Sally	2016-11-11 06.02.21 PM	Smith, Sally
280468		Not Submitted	Test, Mary	10/19/2016 - 10/21/2016	Inpatient	1487776985		Nurse, Jane	2016-11-11 05.48.21 PM	Nurse, Jane
280680		Not Submitted	Frozen, Elsa	11/29/2016 - 11/30/2016	Inpatient			Smith, Sally	2016-11-11 05.46.14 PM	Smith, Sally

Submitted requests will have a *Review in Progress* status. If a user has entered an email address on the *Provider Details* page, they will receive emails when there is activity on a case. Look for cases that are last updated by system and where status is no longer *Review In Progress.* Those cases with updates or a decision can be viewed by selecting **Request Tracking ID**.

Viewing a decision/request for additional information



To view status details, select the tracking number from the dashboard and then select **Expand All** to allow the case information to be viewable. View decision letters associated with your requests.

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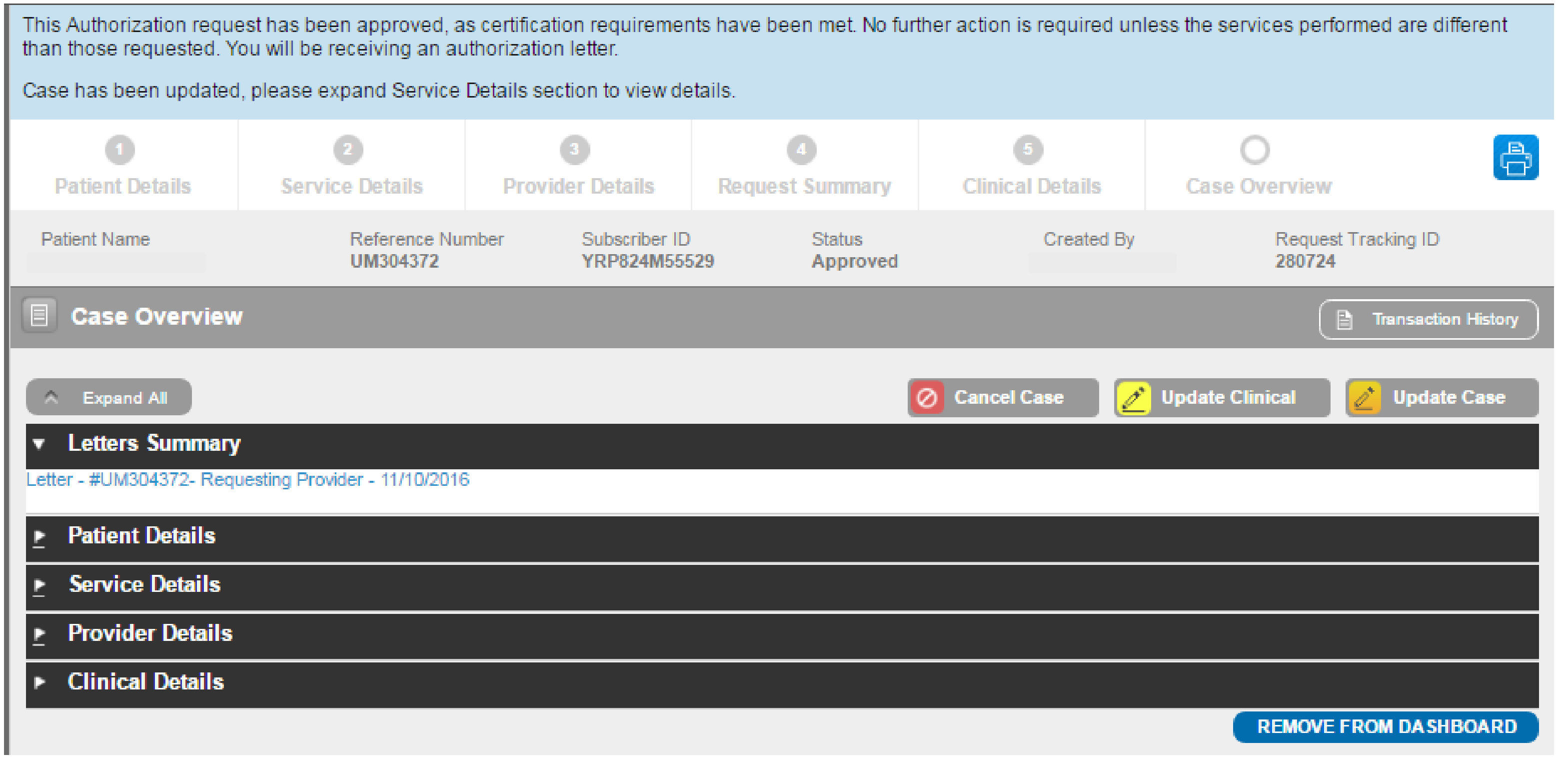
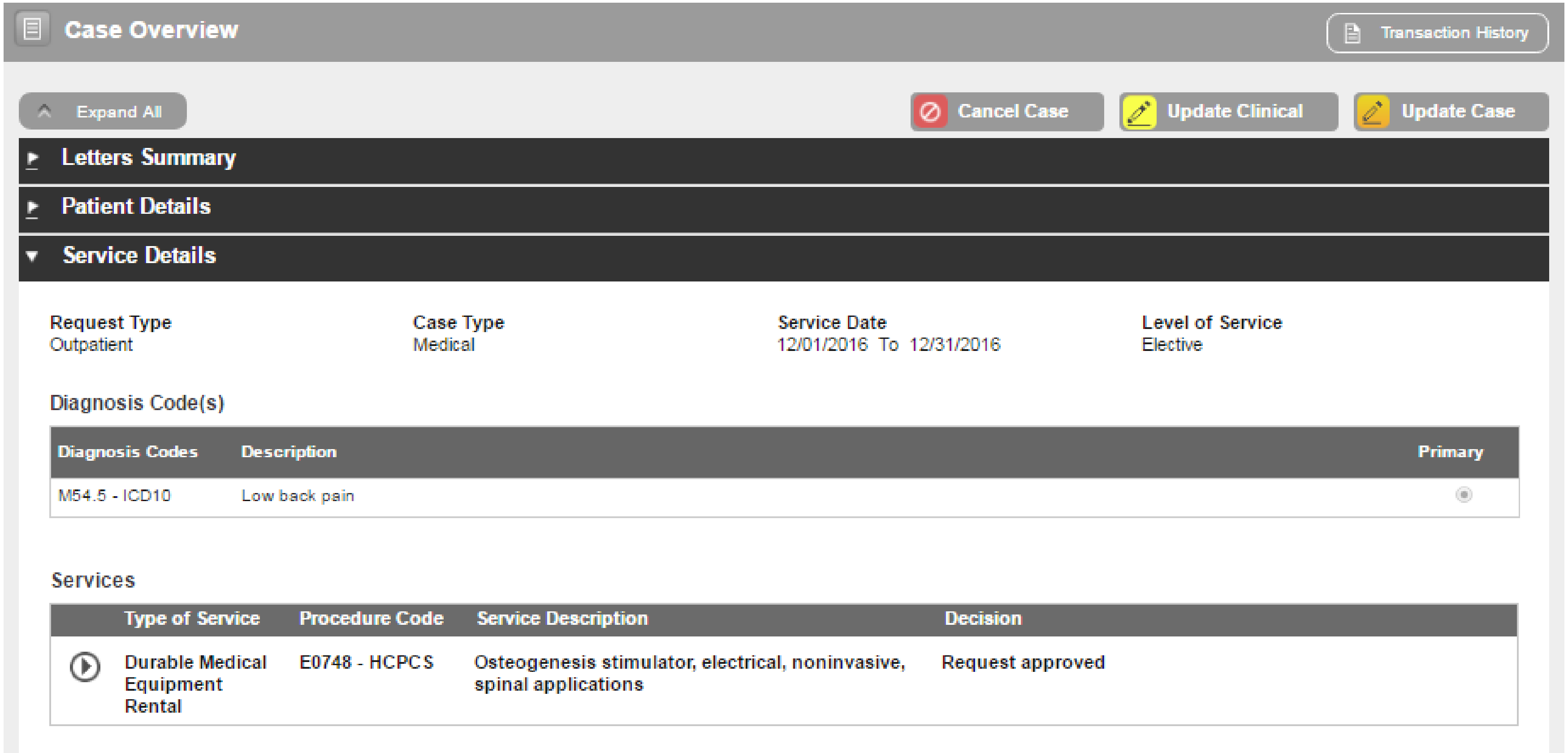
Provider letters



Provider letters associated with the request are viewable by expanding the **Letters Summary** section.

Viewing a decision



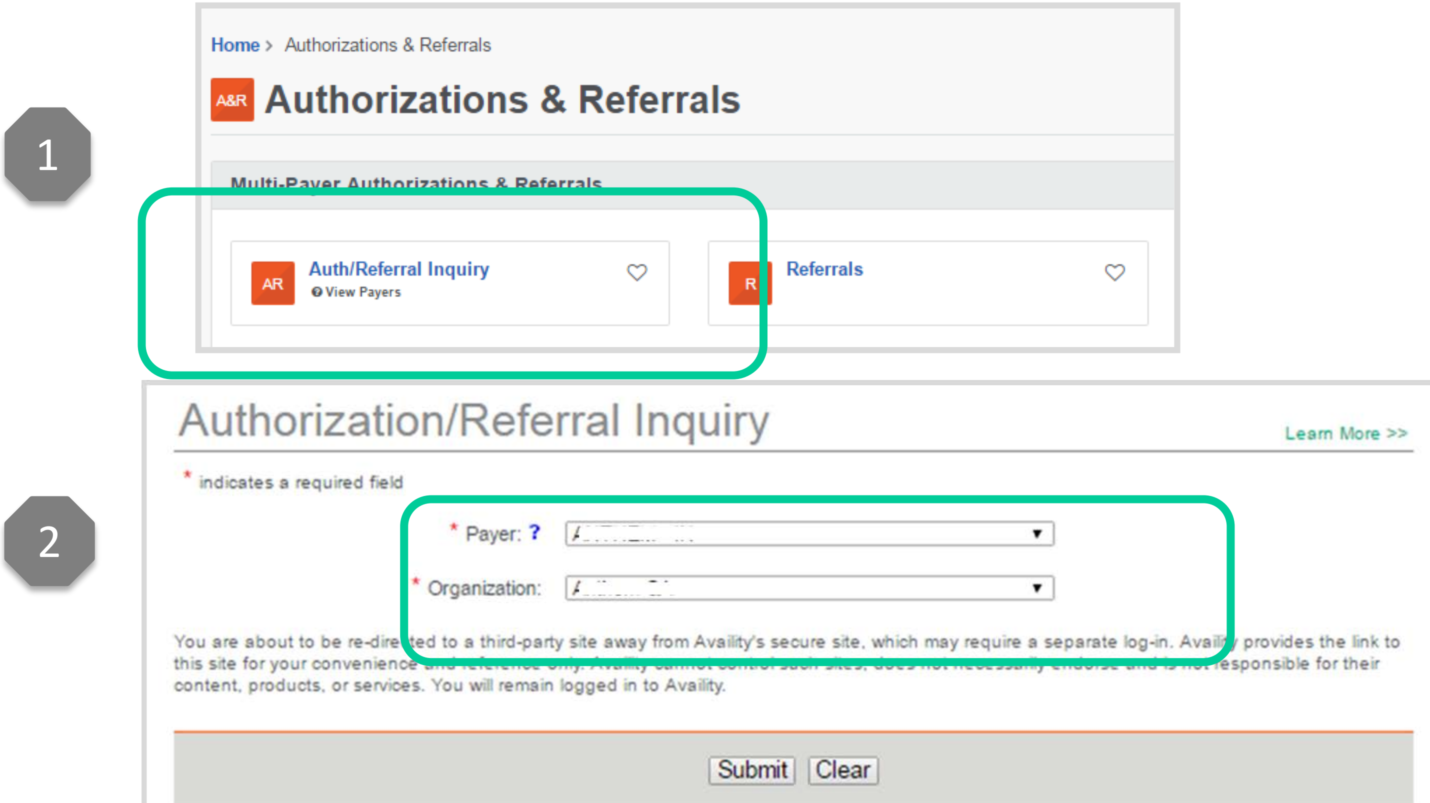
Look at the *Procedure Code* section to view the decision, to see if additional information is needed or to see if the case is pending for other reasons.

Discharge notes

You will have an option available to select **Update Discharge Info** if it applies to the case — This is also available for cases submitted by phone/fax.

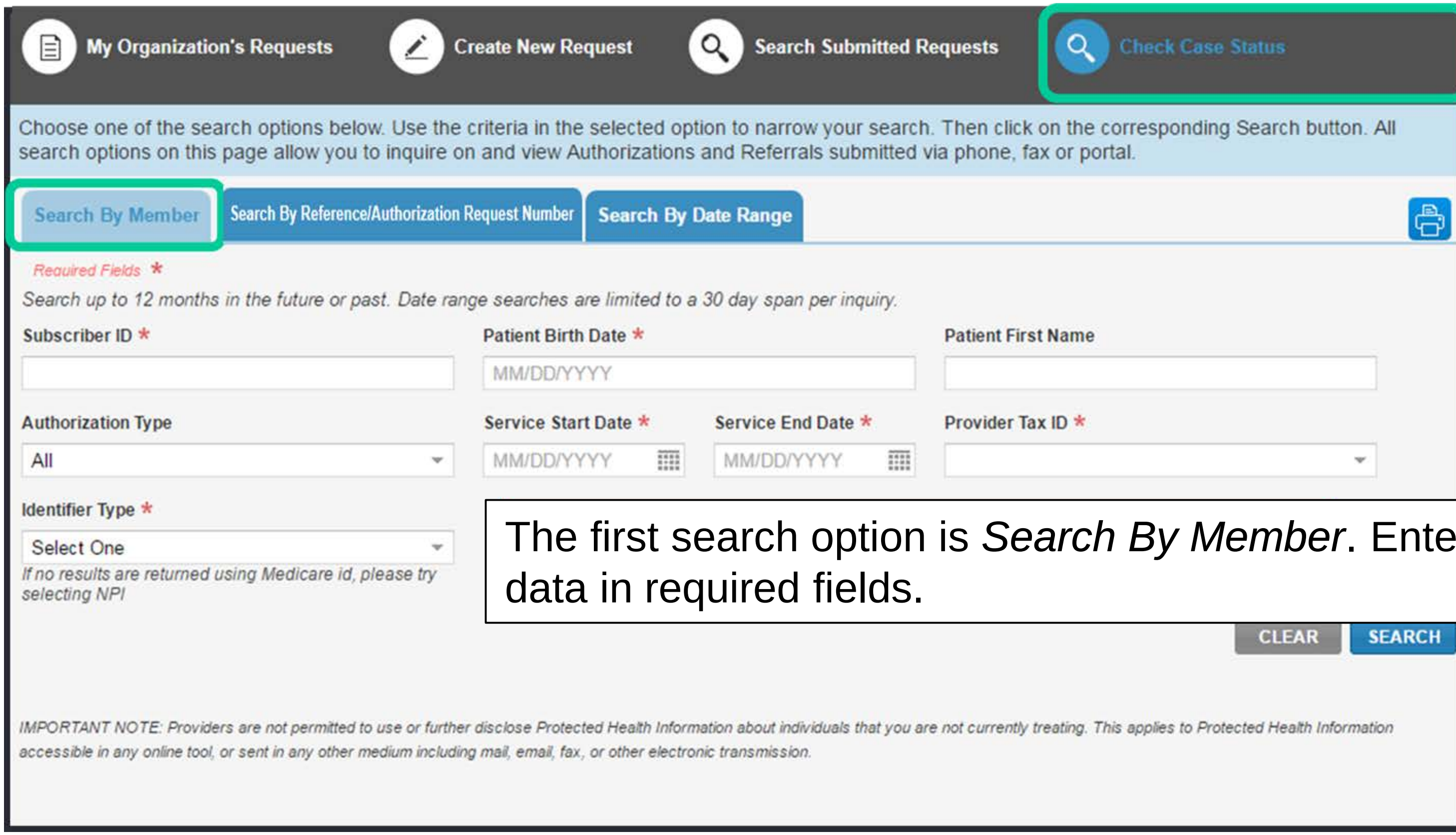
Inquiry features on the ICR

User access to the ICR — inquiry



To inquire on any authorization submitted by phone, fax, ICR or other online tool, choose **Auth/Referral Inquiry** under the *Authorizations & Referrals* link. Then choose the payer and organization.

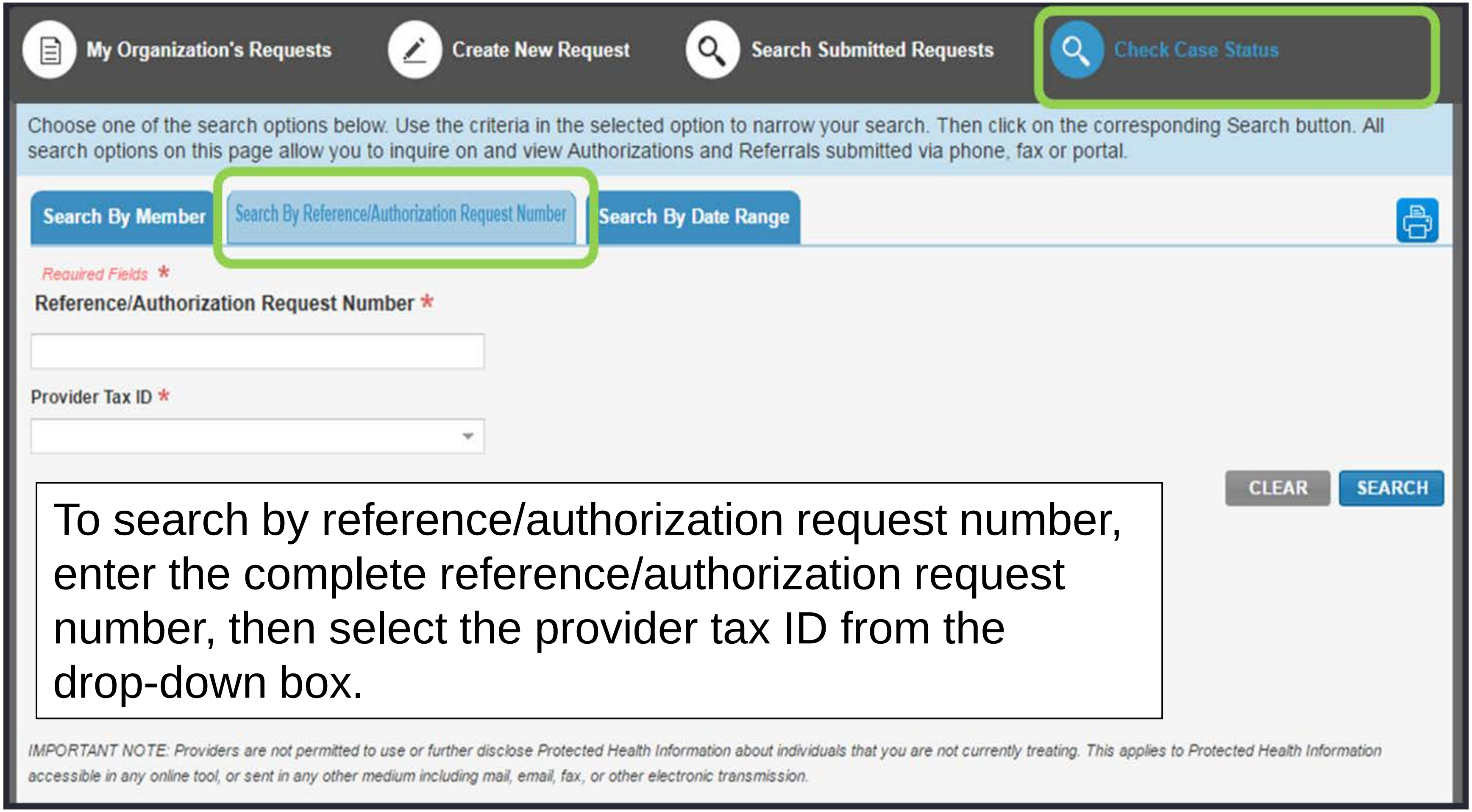
Search using Check Case Status



The first search option is *Search By Member*. Enter data in required fields.

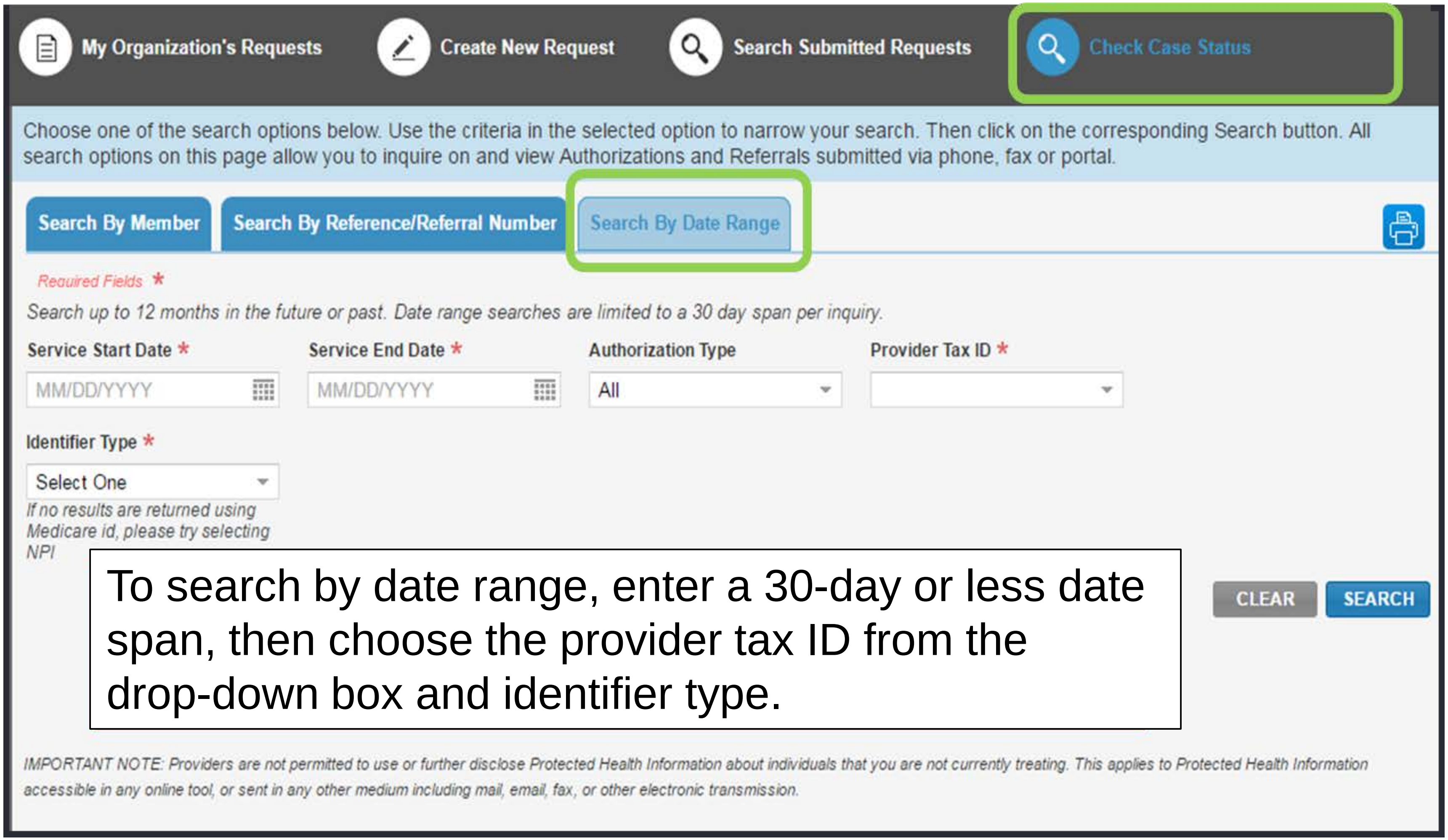
Ordering and servicing physicians and facilities can make an inquiry to view the details for the services using the **Check Case Status** option.

Search by reference/authorization request number



To search by reference/authorization request number, enter the complete reference/authorization request number, then select the provider tax ID from the drop-down box.

Search by date range



To search by date range, enter a 30-day or less date span, then choose the provider tax ID from the drop-down box and identifier type.

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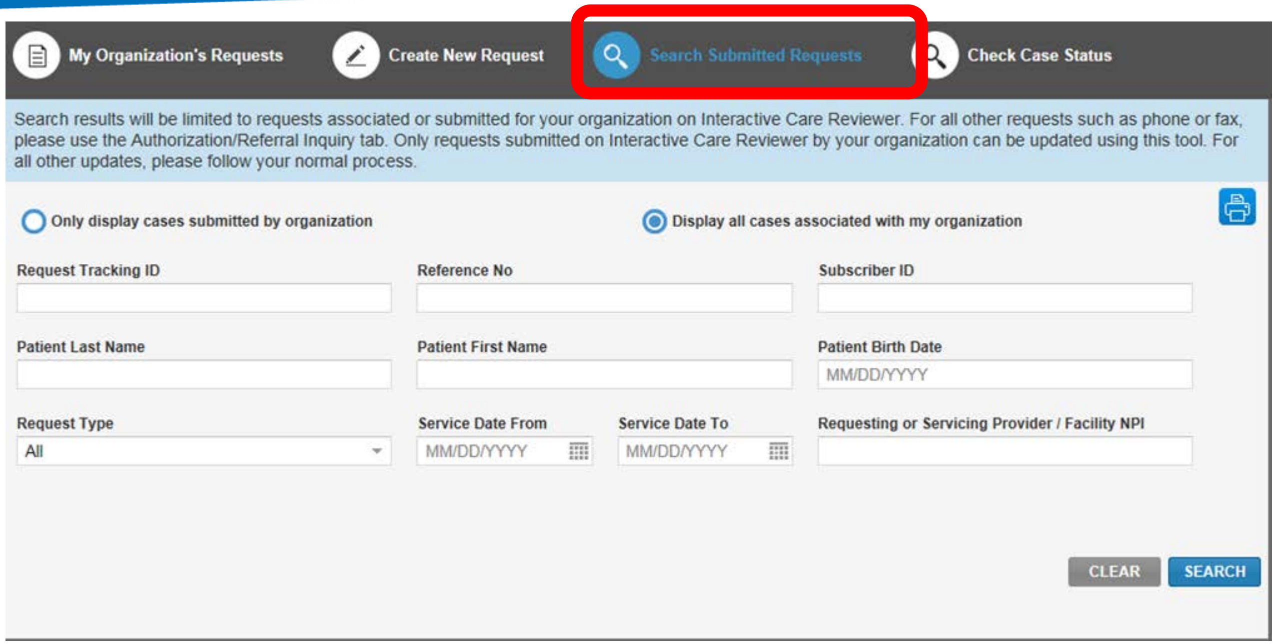
Search organization requests

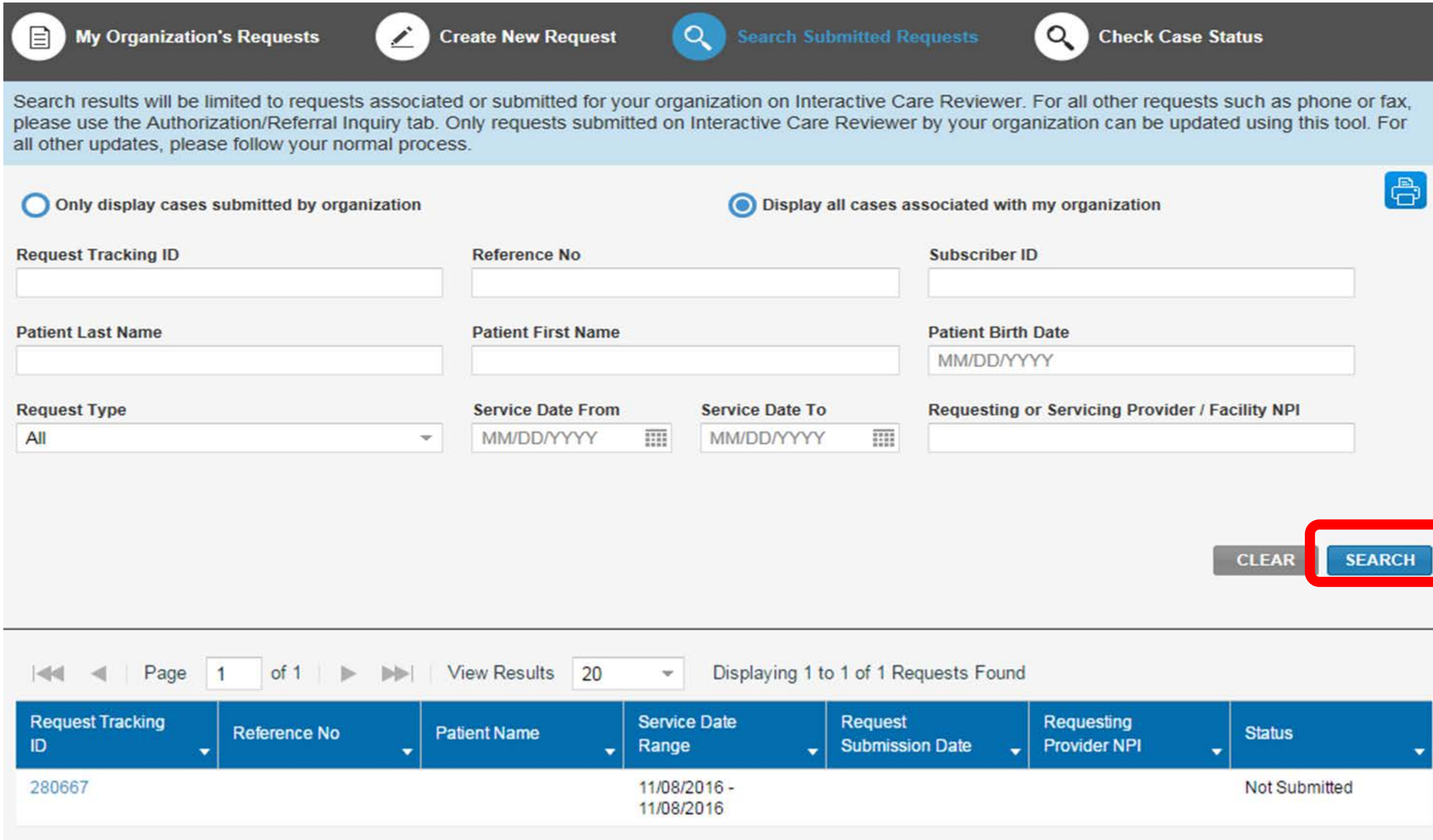


Users will have the option to select ***Only display cases submitted by organization*** or ***Display all cases associated with my organization*** and complete one or more of the fields.

What functions are available from the *Search Submitted Requests* tab?

- Locate a request that has a status of *Review Not Required*.
- Locate a request that is not submitted.
- Locate a request that has been archived.
- Update a request.

Search results



Anthem

Behavioral health authorization submission capabilities

- Submit authorization requests for behavioral health services including acute inpatient stays, residential and rehabilitation stays, intensive outpatient and partial hospital programs, electroconvulsive therapy, transcranial magnetic stimulation, applied behavioral analysis therapy, and psychiatric testing.
- Templates allow providers to enter clinical details previously provided via phone.
- Update cases or request an extension within the ICR tool.

Wrapping up

Helpful tip:

- If you receive the *system temporarily unavailable* message on a consistent basis, your organization's firewall may be blocking the site. Please contact your IT department and ask them to review internet filters and add **https://mediproviders.anthem.com/ky** as a trusted site to bypass the proxy.
- Clear your cache if there seems to be missing fields or if you continue to have errors.
- Remember — Admit date for inpatient requests cannot be changed once you submit.
- When you make a new member plan, make a new favorites list.
- You can submit your requests from any computer with internet access. We recommend you use Internet Explorer 11, Chrome, Firefox or Safari for optimal viewing.

Wrapping up (cont.)

Now it's your turn!

- Use ICR to determine whether an authorization is required, submit authorizations for many members covered by our plans and inquire to find details on submitted cases.

As a reminder:

- Access the ICR via the Availity Portal. If your practice does not have access, go to **http://www.availity.com** and select **Register**.
- Already use the Availity Portal? Your Availity administrator can grant you access to **Authorizations and Referral Request** and/or **Authorization and Referral Inquiry,** and you can start using the ICR right away.

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Contacts

For questions about ICR, contact Provider Services at **1-855-661-2028**.

For questions about Availity registration and access, contact Availity Client Services at: **1-800-AVAILITY** (**1-800-282-4548**).

Adding clinical information to a behavioral health inpatient continued stay request

Applicable to behavioral health inpatient requests for Medicare and Medicaid

This communication applies to the Medicare Advantage and Medicaid programs in Kentucky.

Qualifications for adding clinical to an ICR request

- The ICR request must be:
  - A psychiatric or substance abuse inpatient case.
  - In an approved or pending status.
  - An ICR-created request (in other words, not phone or fax).
- When clinical is able to be added to a request in ICR, this button will appear in the top right of the ICR screen if the request is opened from the dashboard or via “search submitted requests.”

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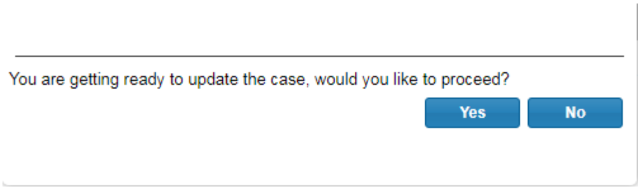
How to add clinical to the request

- After selecting the **Update Clinical** button, the user will be displayed this message:



- User should select **Yes,** and then they will be directed to the *Clinical Details Page*.
  - User can attach a file(s) or add clinical notes into the **Clinical Notes** text box.
  - User must provide their phone number and extension (if applicable).
  - Select **Next** at the bottom of the screen when clinical has been added/attached.

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Screen shot of Clinical Details page

Attachments, Images and Photos

Please attach only documentation that contains the minimum necessary personal health information (PHI) to support the review for this request.Please verify you are attaching image(s) for the correct patient before clicking upload.

Choose File No file chosen

Max file size: 10MB. Allowed file types: jpeg/jpg, bmp, tiff, pdf, gif, doc, docx, xls, xlsx, txt

Description

Upload

Clinical Notes

In order to submit a request, clinical information must be entered. Only pertinent clinical information for the request should be included in the clinical note.

Please verify you have added clinical information for the correct patient before clicking on 'Add Note'.

Add Note

Updated By

User Name	Contact Telephone *	Ext
dsf, sdf	(555) 555-5555	123

How to add clinical to the request

- After selecting **Next**, the user is presented with the *Case Overview Page*.
  - Scroll to the bottom of the *Case Overview Page* and select the **Submit Update** button. 

  - The user will then be directed back to the dashboard. The additional clinical will be sent to utilization management (UM) UM for evaluation.

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Thank you

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