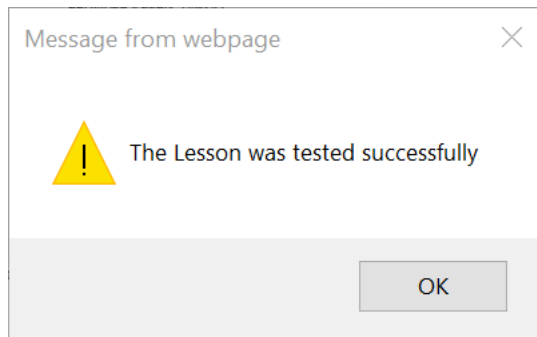


Reviewer Instructions

- Click [HERE](#) to preview the course.
 - This course is not published yet and this link is only for review.
 - You may receive this pop-up during your review. Click OK and return to the active preview screen.



- Leave your feedback for the course as a comment bubble in this document, save your changes and check in this document when you are done.

1.1 Title



Notes: Welcome to the EnterpriseNow Issue Submitter course.

1.2 Intro



Notes:

EnterpriseNow is the platform for resolving customer issues. The HC Enterprise Issue Management will create standard processes to identify, record, and analyze issue drivers and prioritize actionable opportunities to improve our services for our constituents. Our commitment to resolving issues within a specific turnaround time (TAT) is evidence that we value performance. Following through with our commitment to our constituents is a display of our compassion and will fortify our relationships.

1.3 IN THIS LESSON

EnterpriseNow: Issue Submitter

IN THIS LESSON

01

Determining if a Claim Should be Submitted to EnterpriseNow

02

Accessing EnterpriseNow

03

Creating an Issue

04

Notes Captured in

05

Assessment

Notes:

In this lesson you will learn how to submit claims that need to be reprocessed through EnterpriseNow for adjustment. Take notes! There will be an assessment at the end of this lesson to gauge your understanding.

1.4 DETERMINING IF A CLAIM SHOULD BE SUBMITTED

EnterpriseNow

01 DETERMINING IF A CLAIM SHOULD BE SUBMITTED

1.5 Access Member in the system

EnterpriseNow
Determining if a Claim
Should be Submitted

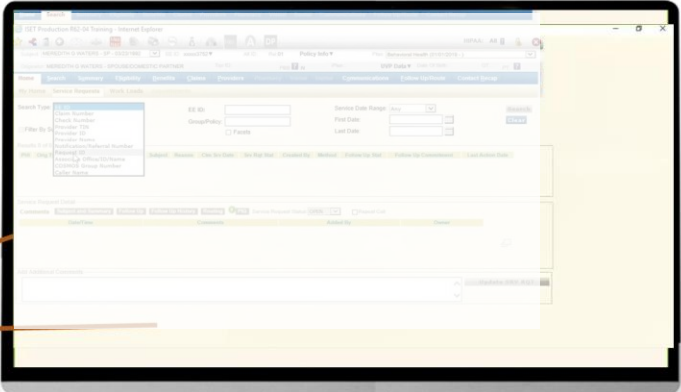
1) Access the member in iSET
and research the claim issue.

Call to Claim WIP Job Aid

OneTool Out of Scope List

Researching Claims QRG

ORS Reviewing Notes



The screenshot shows the EnterpriseNow system interface. The top navigation bar includes 'Home', 'My Home', 'My Claims', 'My Tools', 'My Reports', 'My Settings', and 'My Profile'. The main content area displays a member profile with fields for 'Member ID', 'Group/Policy', 'Service Date Range', 'Print Date', and 'Last Date'. Below the profile, there are several tabs: 'Home', 'My Claims', 'My Tools', 'My Reports', 'My Settings', and 'My Profile'. The 'My Claims' tab is selected, showing a list of claims. Arrows point from the 'Call to Claim WIP Job Aid' and 'OneTool Out of Scope List' buttons to the 'My Claims' and 'My Tools' tabs respectively.

Notes:

- All of the steps that will be reflected in this demonstration are outlined in the Call to Claim WIP Job Aid.
- Follow these steps for determining if the Issue needs to be submitted in EnterpriseNow.
- First, access the member in the system. Refer to the system User Guide Step by Step if needed <https://enterprisenow.hyperlink here>.
- If you find that this is a restricted issue, which means they are out of scope, warm transfer to the appropriate team. Refer to OneTool > Out of Scope Sharepoint Tab if needed <https://enterprisenow.HC.com/>
- If the call is regarding a claim issue that has been paid or a claim that needs to be reprocessed, you may need to route it back to claims.
- Before routing an issue to claims, be sure to do the proper research, including referencing previously submitted issues. Refer to ORS Routing - Reviewing Notes ([hyperlink here](#)) and Researching Claims QRG ([/hyperlink here](#))

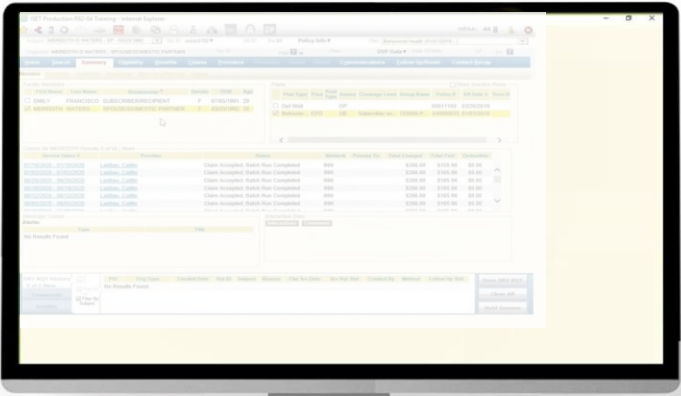
1.6 Complete auto-doc

EnterpriseNow
Determining if a Claim
Should be Submitted

2) Complete auto-doc actions

Call to Claim WIP Job Aid

Documenting Call in

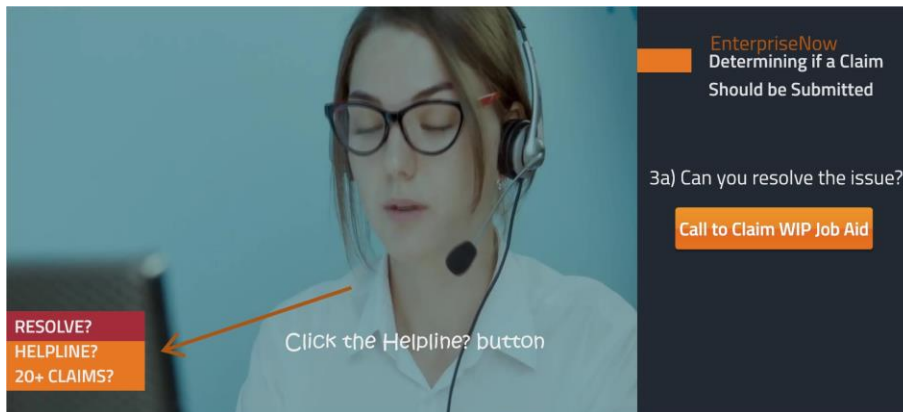


The screenshot shows the EnterpriseNow system interface. The top navigation bar includes 'Home', 'My Home', 'My Claims', 'My Tools', 'My Reports', 'My Settings', and 'My Profile'. The main content area displays a list of claims with columns for 'Member ID', 'Group/Policy', 'Service Date Range', 'Print Date', and 'Last Date'. Below the list, there are several tabs: 'Home', 'My Claims', 'My Tools', 'My Reports', 'My Settings', and 'My Profile'. The 'My Claims' tab is selected, showing a list of claims. Arrows point from the 'Call to Claim WIP Job Aid' and 'Documenting Call in' buttons to the 'My Claims' and 'My Tools' tabs respectively.

Notes:

- Complete all the auto-doc actions for this issue prior to determining if issue can be resolved/submitted. Refer to Documenting Calls - THE SYSTEM ([/hyperlink here](#)).
- Completing auto-doc actions is important. If this step isn't completed, the EnterpriseNow Submit form will not auto-populate specific fields within the form.

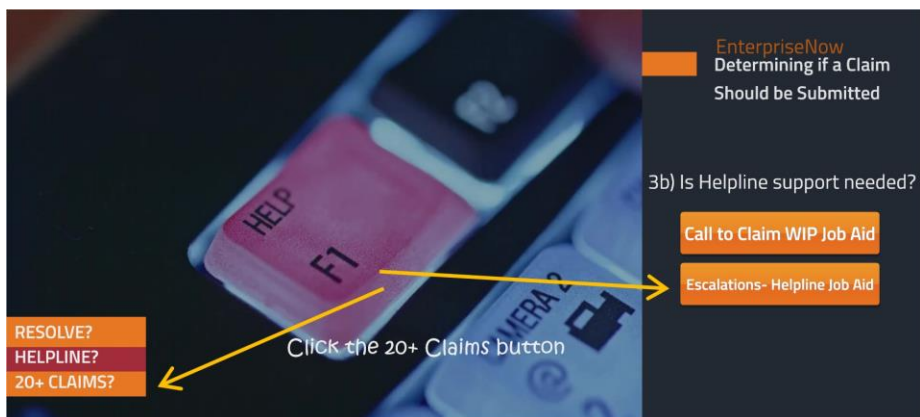
1.7 QUESTIONS FOR DETERMINATION Resolve (Slide Layer)



Notes:

- Based on your research determine if you are able to resolve the caller's issue.
- If so, complete and document the call per standard procedure.
- If not, determine if Helpline support is needed.

Helpline (Slide Layer)



Notes:

- If Helpline support is needed, follow the procedure according to the Helpline Job Aid ([/hyperlink here](#)).

20+ Claims (Slide Layer)

✓ You are unable to resolve the call
✓ Helpline support is not needed
✓ There are 19 claims or less

Submit in EnterpriseNow

RESOLVE?
HELPLINE?
20+ CLAIMS?

EnterpriseNow
Determining if a Claim
Should be Submitted

4) Are there 20+ claims?

Call to Claim WIP Job Aid

Notes:

- If the issue involves 20 or more claims, this issue cannot be routed and must be sent to the Claim Research Team (CRT).
- If you are unable to resolve the claim issue and helpline support is not needed and the issue involves less than 20 claims you can proceed with submitting the issue in EnterpriseNow.

1.8 ACCESSING ENTERPRISENOW

02 EnterpriseNow
ACCESSING ENTERPRISENOW

1.9 Access

EnterpriseNow Access

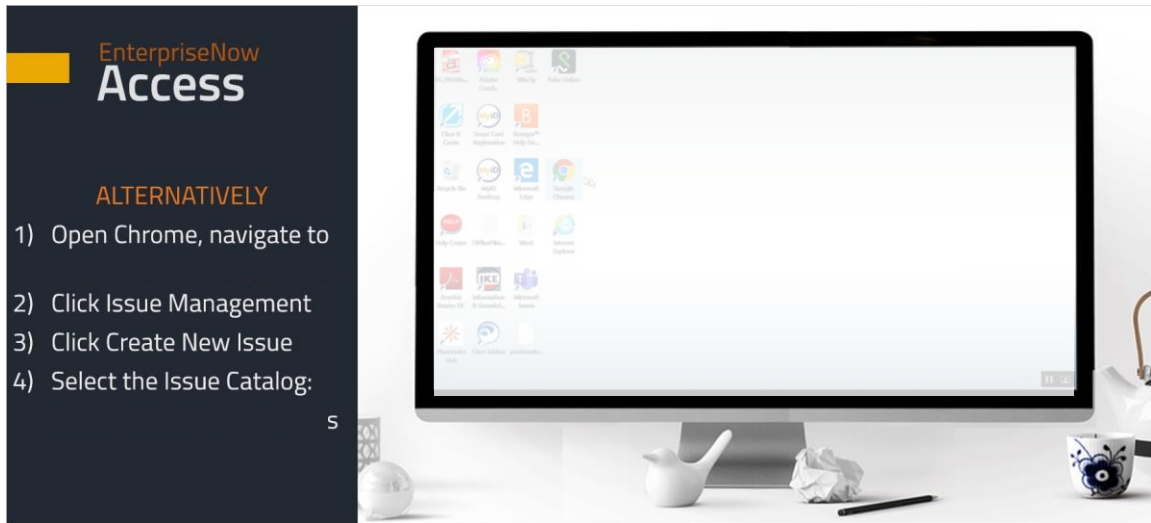
- 1) Launch EnterpriseNow from
 - Navigate to Follow Up/Route tab in iSET
 - Select Claim as the Category Type
 - Click **Submit** EnterpriseNow Issue

Alternative Access

Notes:

- Once you have determined that an EnterpriseNow Issue will need to be submitted to a claim adjustor for reprocessing, navigate to the Follow Up/Route tab in the system.
- Next, select the Category Type: Claim to enable the new "Submit EnterpriseNow Issue" button
- Click the "Submit EnterpriseNow Issue" button
- EnterpriseNow will launch in a separate window.
- Remember, if you completed the auto-doc actions, THE SYSTEM will send some member, claim and provider information to the EnterpriseNow Form to be pre-populated.
<https://enterprisenow.HC.com> hyperlink here.

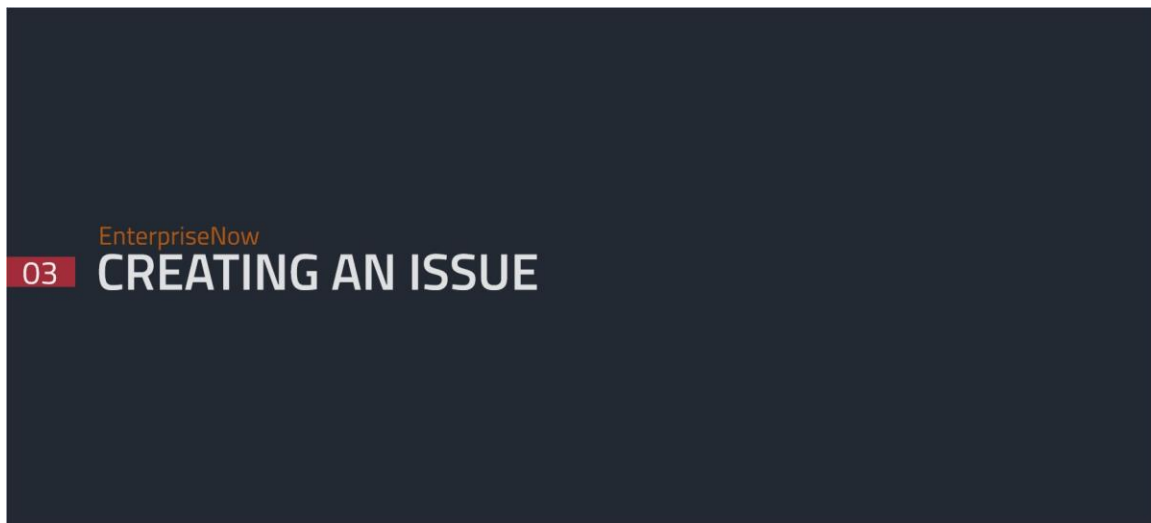
- 1.10 Access



Notes:

- If you are unable to access EnterpriseNow through the system, access it manually by opening EnterpriseNow in Chrome.
- Next, open the Issue Form by clicking Issue Management, then create new issue.
- An additional step is required if accessing the form outside of the system.
- In the Service Catalog, select Issue-Behavioral Solutions.

1.11 CREATING AN ISSUE



1.12 Issue Details Section

Notes:

- Complete the issue form by filling out as much information with as much detail as possible to help meet our Service Level Agreement (SLA) goals.
- As you complete the fields in EnterpriseNow Issue form, you can access the various THE SYSTEM tabs to obtain the information for the form without losing the auto-populated information. Please use the copy/paste functionality from THE SYSTEM/OneTool as needed.
- Required fields will be noted with an asterisk.
- Some fields will be pre-populated with information from other systems.
- Let's take a moment to review the form.
- The first section is the **Issue Details** section.

- The **Issue Received Date** will be system generated based on the time and date of the incoming call. Do not change the Issue Received Date.
- Your name will be auto populated in the **Submitted By** field. This is not an editable field.
- Select Phone as the **Issue Submission Method** since you will create issues based on incoming calls you receive.
- Use the drop down to select **Who the Issue** is for; a member, provider or client. This is a dynamic field. Depending on the option you choose additional fields will display.
- **Issue Summary** will auto-fill after the form is submitted with the Member name and description of the claim issue. You do not have to enter text in this field.
- Use the **Universal Issue** field to indicate if the issue is related to COVID-19.
- The **Product Family** is system generated and is not an editable field.
- Select Behavioral ORS to Claim as the **Product Line**.
- Select the **Issue Category** and **Sub-Category** based on the claims platform and nature of the issue. These fields are important because they will route the issue to the appropriate group for resolution. Some Sub Categories will require additional information. A pop-up will appear as a template for notes. The template will let you know what information to add to the **Full Description of Issue/ Expected Outcome** field.
- In the **Line of Business** field select commercial, Medicaid or Medicare.
- If the **Client / Account Name** is available and relevant, search for the client name and Provider in the respective fields.
- The fill in the Group/Policy ID if available and didn't pre-populate.
- The Claims Platform field is a required field.
- The **Full Description of Issue/ Expected Outcome** field will be filled in with the notes from the template in the pop-up box. You can add additional information as needed.

1.13 Additional Details Section

The screenshot shows a web application interface. On the left is a sidebar with a 'Filter navigator' at the top and a menu below it containing 'Self-Service', 'Workplace', 'EPIM Provider Maintenance', and 'Issue Management'. The 'Issue Management' section is expanded, showing options like 'cMDM Client References', 'Member Search Source Codes', 'Create New Issue', 'My Submitted Issues', 'My Watched Issues', and 'My Groups' Submitted Issues'. The main content area at the top shows 'Authorization # : 999999' and 'CAC Site : 99999999'. Below this, the 'Additional Details' section is active, featuring an 'Issue Origination' dropdown menu. The 'Claims/Clinical' section is also visible, containing fields for '# of Claims', 'Date of Service (FROM)', 'Claim Number(s)', 'Date of Service (To)', and 'CPT, HCPC or Revenue codes'. Each of these sections has a 'More information' link and a text box for additional details.

Notes:

- Scroll down to the next section of the form: The **Additional Details Section**.
 - Since the issues you receive are from incoming calls, select Customer Contact -Call as the **Issue Origination** field using the drop down.

1.14 Claims/Clinical Section

This screenshot shows the 'Claims/Clinical' section of the software interface. It includes fields for '# of Claims', 'Date of Service (FROM)', 'Claim Number(s)', 'Date of Service (To)', and 'CPT, HCPC or Revenue codes'. Each field has a 'More information' link and a text box for additional details. Below these fields is the 'Additional Reference IDs' section, which includes an 'ORS ID' field. The sidebar on the left is identical to the previous screenshot, with the 'Issue Management' section expanded.

Notes:

- **Claims/Clinical** is the next section of the issue form.
 - Enter the **Number of Claims** being sent back for adjustment.
 - The **To and From Date of Service** fields are required.
 - If there are multiple claim impacted, enter the **Claim Number(s)**
 - If available, enter the **CPT, HCPC or Revenue codes**

1.15 Addtnl Ref IDs Section

The screenshot shows the 'Additional Reference IDs' section of a software interface. On the left is a filter navigator with options: Self-Service, Workplace, EPIM Provider Maintenance, Issue Management, and MDM Client References. The main content area has a section titled 'Additional Reference IDs' with a minus icon. It contains the following fields: 'ORS ID' (text input), '* PG / Non PG' (dropdown menu with 'PG' selected), '* Physician / Facility' (dropdown menu with 'None' selected), '* Onshore / Offshore' (dropdown menu with 'Onshore' selected), and '* Div Code (for Cosmos)' (text input). To the right of these are three text input fields: 'Diagnosis Code', 'Diagnosis Code Description', and 'Remark Code'. Below this section is another section titled 'Escalation and Connected Issues' with a minus icon, containing 'Escalation Needed' (dropdown menu with 'Routine' selected). At the bottom is a section titled 'Communication and Notification' with a minus icon.

Notes:

- Additional Reference IDs is the next section of the issue form. Some of the fields in this section will be pre-filled from auto-documentation. Enter the **ID**. Select an option from the **Physician / Facility** drop down. For claims on the platform enter the Div Code

1.16 Escltd & Cnnctd Issues Section

The screenshot shows the 'Escalation and Connected Issues' section of a software interface. The 'Additional Reference IDs' section above it is partially visible, with 'ORS ID' containing '9999999', '* PG / Non PG' set to 'PG', '* Physician / Facility' set to 'Physician', '* Onshore / Offshore' set to 'Onshore', and '* Div Code (for Cosmos)' containing '99999999'. The 'Escalation and Connected Issues' section has a minus icon and contains 'Escalation Needed' (dropdown menu with 'Routine' selected). Below this is a section titled 'Communication and Notification' with a minus icon.

Notes:

- Complete the Escalation and Connected Issues section by selecting the appropriate escalation level from the drop-down.
- For High and Critical escalation, you must complete the Escalations Comments field.

1.17 Communication & Notification Section

Filter navigator

Self-Service

- Workplace
- PBM Provider Maintenance
- User Management
- Medical Record Management
- Medical Claims Management
- Medical Claims History
- Medical Claims Status
- Medical Claims History
- Medical Claims History
- Medical Claims History
- Medical Claims History

Escalation and Connected Issues

Escalation Needed: High

* Escalation Comments: This claim issue requires expedited processing because it was previously resubmitted.

Communication and Notification

Contact Name: [Text Box]

Preferred Method of Contact: None

Inform caller that if the claim is adjusted they will receive an updated EOB/PRA. Contact phone and email will be used if outreach to the customer is needed to further understand the issue. Do not offer a return call to the customer. If the customer insists on receiving a call back, transfer as a Supervisor Call, or submit to the Helpline instead of Claims Rework Teams.

Contact Email: [Text Box]

Contact Phone: [Text Box]

Notes:

- Complete the Communication And Notification section by filling out the customer contact information.
- Do not offer a callback to the customer. Contact phone and email will only be used if we need to reach out to the customer to further understand the issue.
- Inform caller that if the claim is adjusted, they will receive an updated EOB/PRA.
- If the customer insists on receiving a call back, transfer as a Supervisor Call, or submit to the Helpline instead of Claims Rework Teams.

1.18 Communication & Notification Section

Filter navigator

- Self-Service
- Workplace
- PHM Provider Maintenance
- Case Management
- Care Coordination
- Member Support Services Center
- Claims New Issue
- My Claims Maintenance
- My Work Item Status
- The Process - Understanding Events

This claim issue requires expedited processing because it was previously resubmitted.

Communication and Notification

<p>Contact Name</p> <input type="text" value="Michael Scott"/>	<p>Preferred Method of Contact</p> <div style="border: 1px solid #ccc; padding: 2px;">Phone ▾</div>
--	---

Inform caller that if the claim is adjusted they will receive an updated EOB/PRA. Contact phone and email will be used if outreach to the customer if needed to further understand the issue. Do not offer a return call to the customer. If the customer insists on receiving a call back, transfer as a Supervisor Call, or submit to the Helpline instead of Claims Rework Teams.

Contact Email

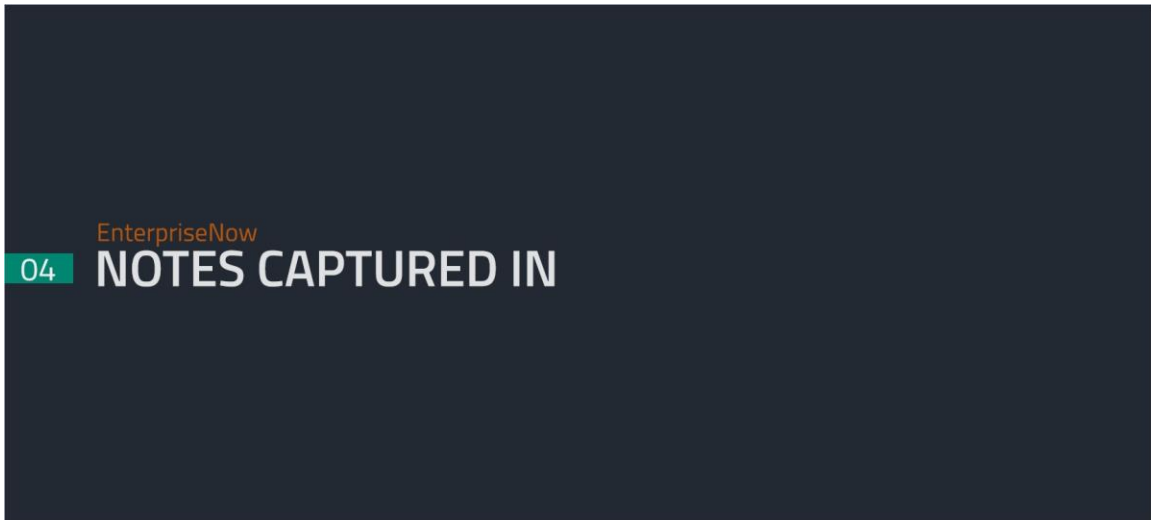
* Contact Phone

Submit

Notes:

- **Click the Submit button.** The EnterpriseNow Issue Submit form screen will not close out until the issue has been fully submitted.
- Provide the caller with the EnterpriseNow Issue Submission number and Remind the caller to follow up after the turnaround time.

1.19 NOTES CAPTURED IN the system

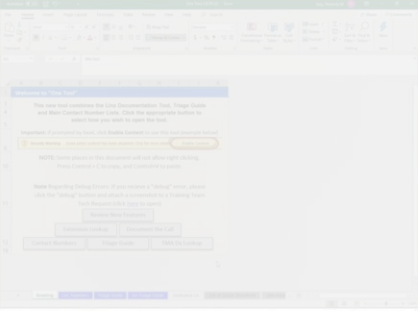


1.20 Notes in the system

EnterpriseNow

Notes in

Document in One Tool



Draft Note:
Audio will be recorded later

Notes in
EnterpriseNow will copy the Issue number and date of the issue to iSET.

Additional Notes
Additional information, unrelated to the issue should be documented in OneTool.

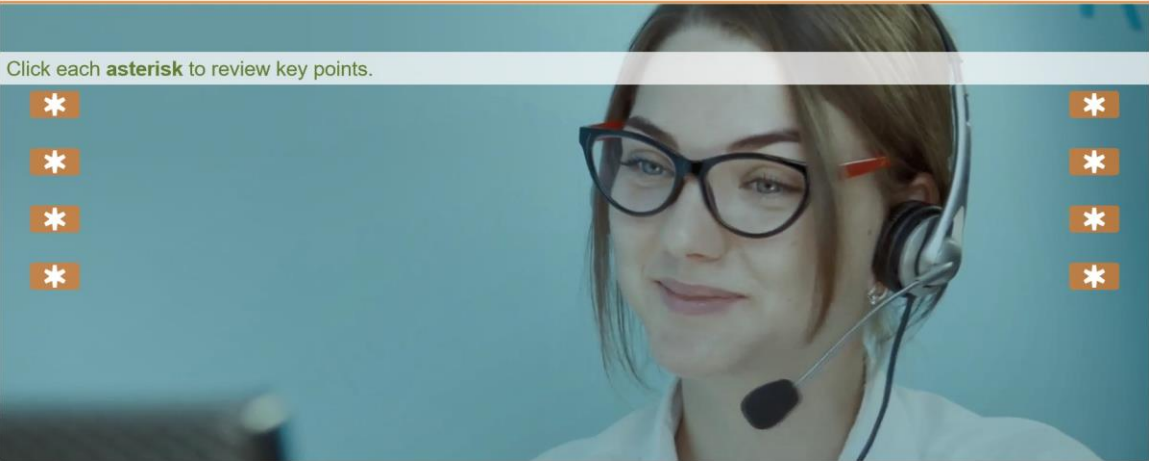
Notes:

- EnterpriseNow will create a note and post to the system including the issue number and the date sent.
- This will ensure, if the caller calls again, that the next agent will be able to know that an issue was created.
- If there is additional information that needs to go into the system, unrelated to the issue itself, create the note in one tool as is standard practice today.

1.21 Key Takeaways

Key Takeaways

Click each **asterisk** to review key points.



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Determine (Slide Layer)

Key Takeaways

Click each **asterisk** to review key points.

*

Determine if an Issue Should be Submitted
Research the claim issue. If you determine that the claim issue needs to be sent to a claim adjustor, Helpline is not needed and there are fewer than 20 claims, submit a form in EnterpriseNow.

*

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Auto Doc (Slide Layer)

Key Takeaways

Click each **asterisk** to review key points.

*

*

Complete Auto Documentation
Complete Auto Documentation in order to pre-populate fields in EnterpriseNow.

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Access (Slide Layer)

Key Takeaways

Click each **asterisk** to review key points.

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Access EnterpriseNow

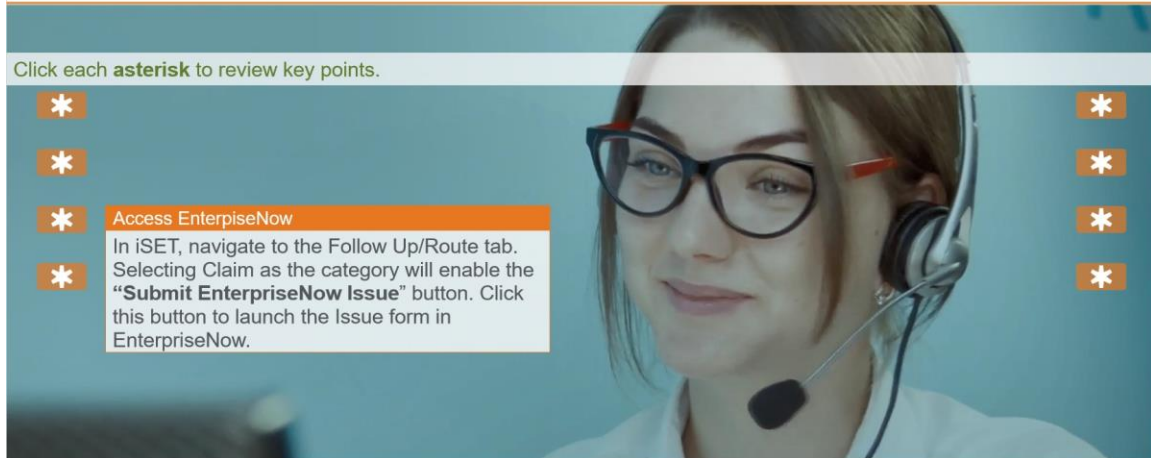
In iSET, navigate to the Follow Up/Route tab. Selecting Claim as the category will enable the "Submit EnterpriseNow Issue" button. Click this button to launch the Issue form in EnterpriseNow.

*

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Submission Form (Slide Layer)

Key Takeaways

Click each **asterisk** to review key points.

*

*

*

*

Submission Form

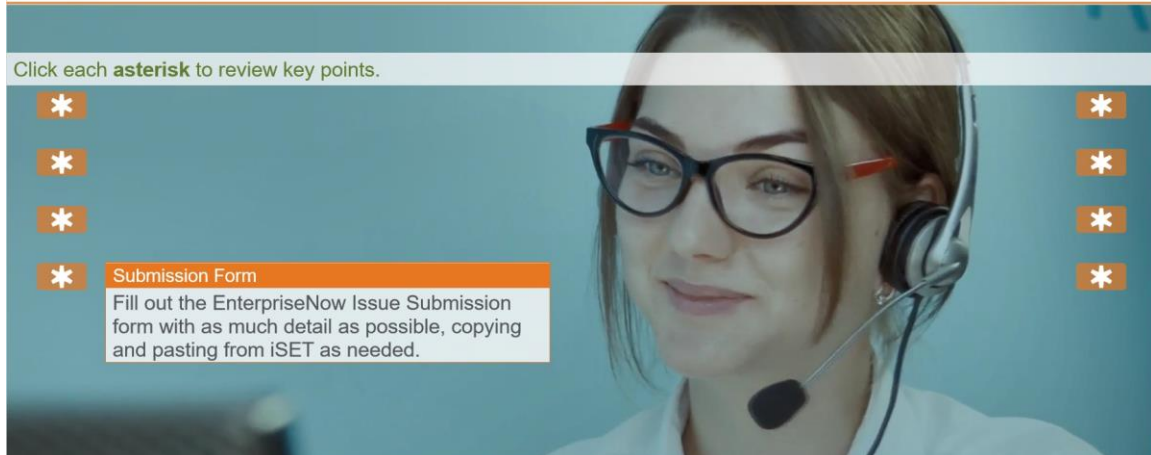
Fill out the EnterpriseNow Issue Submission form with as much detail as possible, copying and pasting from iSET as needed.

*

*

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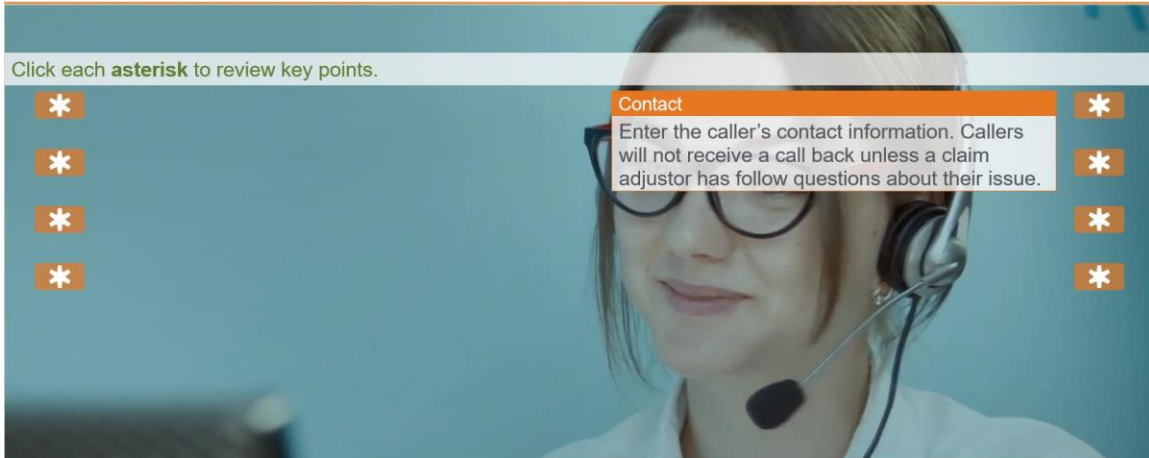
Contact (Slide Layer)

Key Takeaways

Click each **asterisk** to review key points.

Contact

Enter the caller's contact information. Callers will not receive a call back unless a claim adjuster has follow questions about their issue.



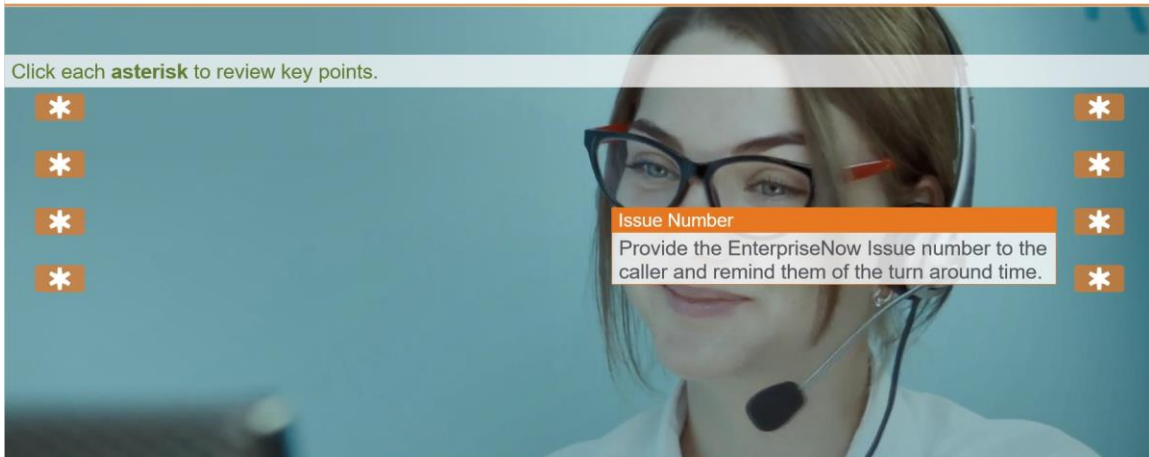
Issue Number (Slide Layer)

Key Takeaways

Click each **asterisk** to review key points.

Issue Number

Provide the EnterpriseNow Issue number to the caller and remind them of the turn around time.



Submit (Slide Layer)

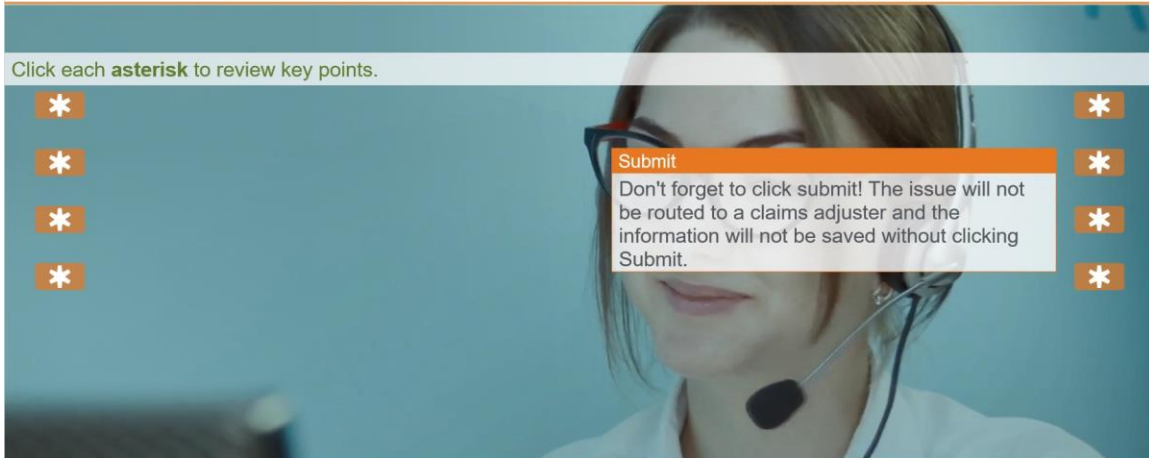
Key Takeaways

Click each **asterisk** to review key points.

***** ***** ***** ***** ***** ***** ***** *****

Submit

Don't forget to click submit! The issue will not be routed to a claims adjuster and the information will not be saved without clicking Submit.



Notes (Slide Layer)

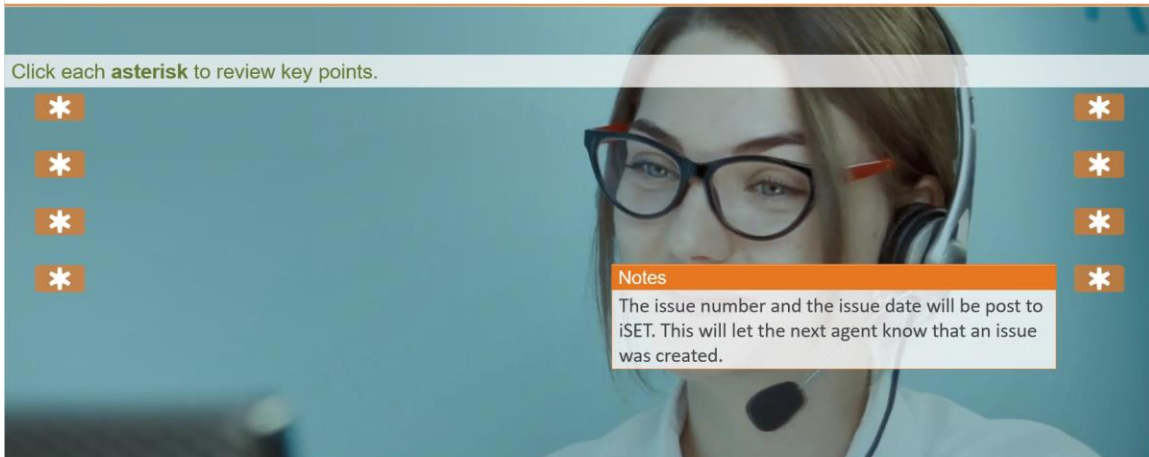
Key Takeaways

Click each **asterisk** to review key points.

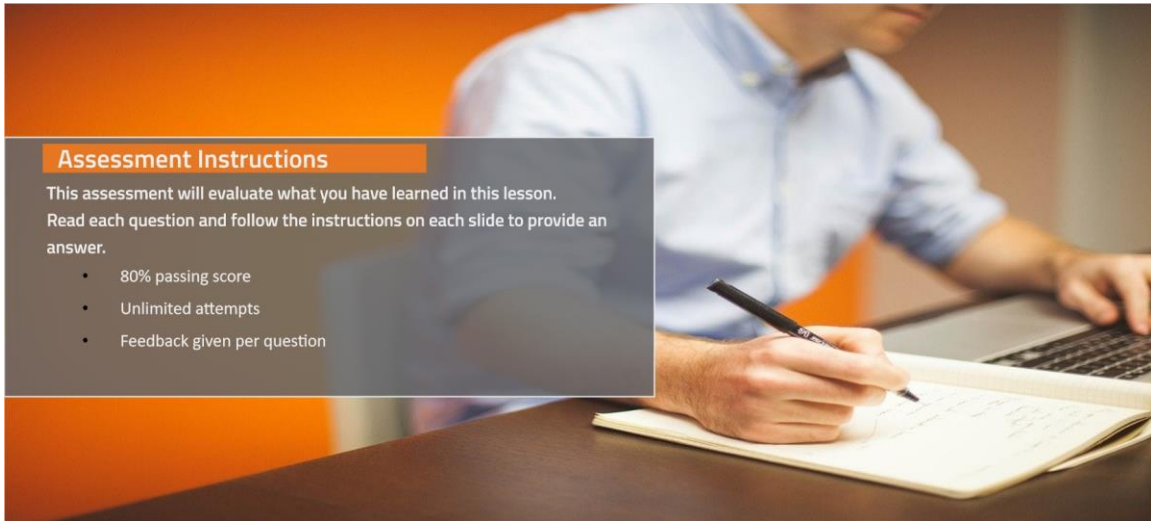
***** ***** ***** ***** ***** ***** ***** *****

Notes

The issue number and the issue date will be post to iSET. This will let the next agent know that an issue was created.



2.1 QUIZ INSTRUCTIONS



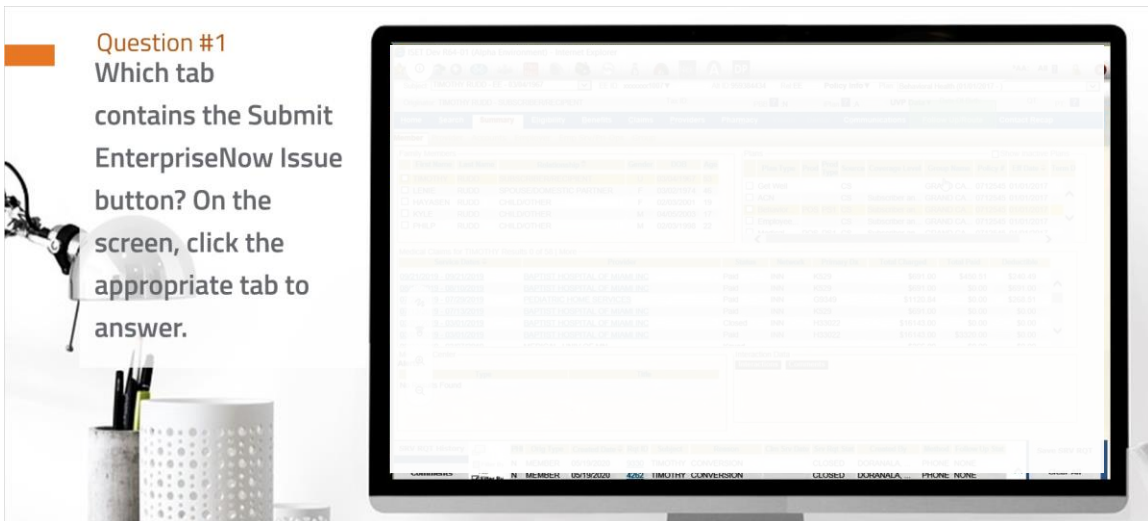
Assessment Instructions

This assessment will evaluate what you have learned in this lesson. Read each question and follow the instructions on each slide to provide an answer.

- 80% passing score
- Unlimited attempts
- Feedback given per question

2.2 Hotspot

(Hotspot, 10 points, 1 attempt permitted)



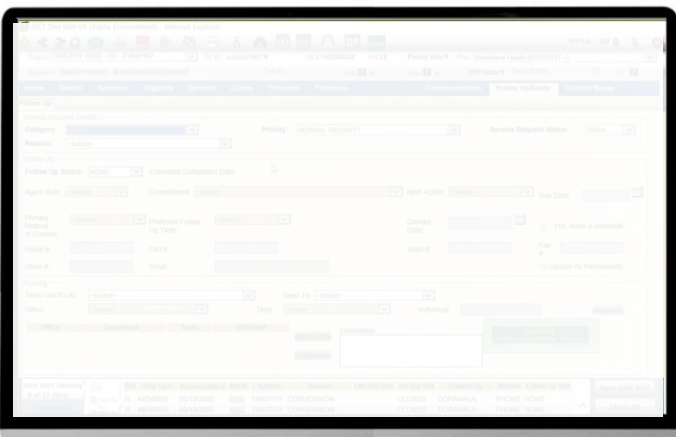
Question #1

Which tab contains the Submit EnterpriseNow Issue button? On the screen, click the appropriate tab to answer.

2.3 Hotspot

(Hotspot, 10 points, 1 attempt permitted)

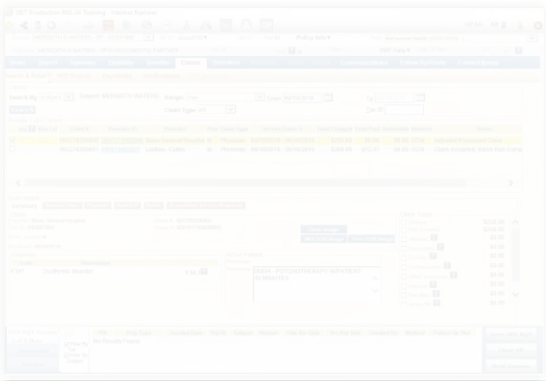
Question #2
Which button would you click to launch the EnterpriseNow Issue Submission form? On the screen, click the appropriate button to answer.

A screenshot of a web browser displaying the EnterpriseNow Issue Submission form. The form is titled "Issue Submission" and contains various fields for user information, contact details, and a description of the issue. A green box highlights the "Submit" button at the bottom right of the form.

2.4 MULTIPLE CHOICE

(Multiple Choice, 10 points, 2 attempts permitted)


Question #3

A screenshot of the EnterpriseNow Issue Submission form interface, showing the "Issue Details" section. The form includes fields for "Issue Title", "Issue Description", "Issue Category", and "Issue Status". The "Issue Status" dropdown menu is open, showing options like "New", "In Progress", "Closed", and "On Hold".

What action can you take to ensure fields in EnterpriseNow are pre-filled? Select an answer from the multiple choice below.

- Ask caller to fill out the online form
- Attached the claims
- Complete Auto Documentation
- Click the transfer info button

2.5 QUIZ SCENARIO



The next few questions will be based on this scenario.

You received a call from one of our members named Michael. He is reporting that his claim was denied because the procedure was not medically necessary, even though, he obtained prior authorization and the provider submitted medical records.

2.6 True or False: This is an issue that should be submitted in

Question #4

True or False: This is an issue that should be submitted in EnterpriseNow to be resubmitted and reprocessed by the claims team.

☒ True

☐ False

Scenario:

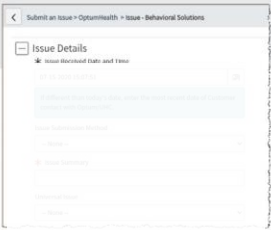
You received a call from one of our members named Michael. He is reporting that his claim was denied because the procedure was not medically necessary, even though, he obtained prior authorization and the provider submitted medical records.

2.7 MULTIPLE CHOICE

(Multiple Choice, 10 points, 2 attempts permitted)

Question #5

Scenario:
You received a call from one of our members named Michael. He is reporting that his claim was denied because the procedure was not medically necessary, even though, he obtained prior authorization and the provider submitted medical records.



When the issue submission form opened in EnterpriseNow the **Issue Received Date** auto populated with the date and time of Michael's incoming call. What should you enter as the date

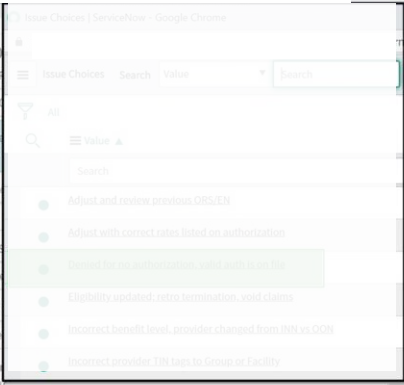
- Change to the claim received date
- Change to the claim denied date
- Change to the date of the procedure
- Do not change the date, use the system generated date

2.8 Hotspot

Question #6

Which Issue Subcategory should you choose for Michael's issue? Click an issue Subcategory from the list to select your answer.

Scenario:
You received a call from one of our members, Michael. He is reporting that his claim was denied because the procedure was not medically necessary, even though, he obtained prior authorization and the provider submitted medical records.



2.9 Hotspot

Question #7

Which escalation level is most appropriate for Michael's issue? Click an escalation from the list to select your answer.

Escalation and Connected Issues

Escalation Needed

Communication and Notification

Contact Name

Contact Email

Contact Phone

Scenario:

You received a call from one of our members, Michael. He is reporting that his claim was denied because the procedure was not medically necessary, even though, he obtained prior authorization and the provider submitted medical records.

Hint:

Issues should be escalated beyond routine, when they meet one of the following criteria:

- Failed resolution at an earlier stage
- Issue re-submitted to same or other channels for resolution
- Issue with increased concern, scale/magnitude, urgency (missed SLA) and/or scope, regardless of the source

Submit

2.10 MULTIPLE CHOICE

Question #8

It's almost time to submit the issue form for Michael's claim issue and you just told him that the claim is being submitted for reprocessing. What should you tell him regarding next steps in the issue resolution process?

☐ You will receive a call back in 48 hours with an update.

☒ If the claim is adjusted, you will receive an updated EOB.

☐ Call back to check the status in a few days.

☐ If the claim is adjusted, you will receive an email confirmation.

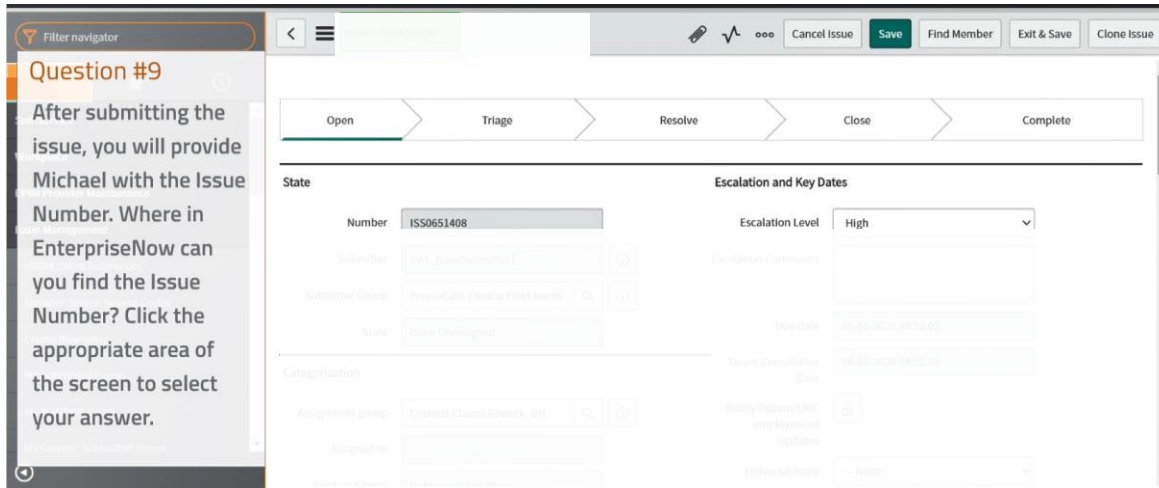
Scenario:

You received a call from one of our members, Michael. He is reporting that his claim was denied because the procedure was not medically necessary, even though, he obtained prior authorization and the provider submitted medical records.

2.11 Hotspot

Question #9

After submitting the issue, you will provide Michael with the Issue Number. Where in EnterpriseNow can you find the Issue Number? Click the appropriate area of the screen to select your answer.



The screenshot shows the 'Issue' form in EnterpriseNow. The form is in the 'Open' state, indicated by a progress bar at the top. The form includes fields for 'Number' (ISS0651408), 'Submitter' (LMT_Researcher1), 'Submitter Group' (HouseCalls Clinical Field North), 'State' (Issue Unassigned), 'Escalation Level' (High), 'Due date' (08-18-2020 09:52:03), 'Target Completion Date' (08-18-2020 09:52:03), 'Assignment group' (Common Claims Network - BH), 'Assigned to', 'Notify Options/UHC employees of updates', and 'Universal Issue' (None). The form also has buttons for 'Cancel Issue', 'Save', 'Find Member', 'Exit & Save', and 'Clone Issue'.

2.12 MULTIPLE CHOICE

Question #10

At the end of your call with Michael, you asked if there was anything else you can do, and he asked for a copy of his insurance cards. Where will you note that request?

- ☐ NoteKeeper
- ☐ EnterpriseNow
- ☒ OneTool
- ☐ You do not have to make notes that do not pertain to the issue

Quiz Results

YOUR RESULTS

Your Score: %Results1.ScorePercent%%
Passing Score: %Results1.PassPercent%%
Congratulations, you passed.

Review Print Retry

2.14 Conclusion

