INTRODUCTION AND GETTING STARTED

• **Introduction:**

ProviderGateway LTC™ is a web based service for Prior Authorization for nursing home services in the State of Ohio. It coordinates transactions between nursing homes and county Medicaid Offices by fully automating the “9401” process. County Case Workers and Providers find that it allows for better communication between both parties for admissions, Medicaid eligibility, Level of Care determination and changes in Patient liability. At all times it maintains historical data, making audits go smoother and improving reimbursement cycle times.

**1.1 Getting Started:**
1. Compatibility: Make sure to use Internet Explorer IE 8.0 or above. ProviderGateway also utilizes pop-up windows throughout the site. Make sure you have allowed Pop-ups from ProviderGateway.com prior to use. For any SUPPORT related questions please e-mail SUPPORT@ProviderGateway.com or call (216) 432-6919.

2. ProviderGateway-LTC™ navigates to features and functions using the modules at the top of the screen; on one click to a specific module, the features show up from which the user can select the actions that they wish to take on the transaction.

3. ICONS on this site:

<table>
<thead>
<tr>
<th>ICON</th>
<th>PURPOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Pencil]</td>
<td>Pencil – Click on this where present to edit a transaction</td>
</tr>
<tr>
<td>![Submit, Cancel, Save, Cancel]</td>
<td>Submit/ Cancel – Always click on these actions to conclude a transaction. Data will not save nor transactions submitted to the Medicaid Unit without clicking on the final “Save” button on this screen</td>
</tr>
<tr>
<td>![Magnifying Glass]</td>
<td>Magnifying Glass – Click on this icon to view the details of a transaction (no editing in this mode)</td>
</tr>
<tr>
<td>![Help]</td>
<td>“?” Help – On the top right corner of the screen for each feature, click on the Help icon to view details on how to use the feature</td>
</tr>
<tr>
<td>![Hover over]</td>
<td>Hover over – Click on this icon to view comments associated with the transaction</td>
</tr>
<tr>
<td>![Small help icon]</td>
<td>Small help icon – Click on this icon for details on a field entry</td>
</tr>
</tbody>
</table>
4. Action Link

The action link is a link to additional actions (transactions) that are permitted for a listed transaction. Note that the additional actions may change depending on the status of a transaction.

5. Search/Filter

On most transaction screens, Search features are present to allow the user to filter the list at hand by submitted criteria. Click on the “Search” feature and enter the required search criteria on the screen. When done, click on the “Search” icon for results.
LEARNING MODULE 1: ACCOUNT ADMINISTRATION

1.0 REVIEW OF PROCESS:

This module will allow you to manage your account details.

The user may edit the following:

(1) User password
(2) Account Details

1.1 BRIEF OVERVIEW:

If ever you should want to change an existing password and create a new one or edit your personal account details, such as: First Name, Last Name, Email Address, Phone Number or Display Name you may do so in this module.

1.2 PROCESSING STEPS:

To update account password:

1. Scroll to the ‘My Account’ module

2. Select ‘change password’ from the drop-down list.

3. The system will forward you to the screen below where you have the option of creating a new password. However, you must first input your old password.
4. In order to process the new password you must also input the security answer to the security question you chose upon initial registration.

5. Once you have filled in all required fields press the ‘Change Password’ button.

6. The new password you have chosen will then be active for use.
1.2 PROCESSING STEPS:

To update account details:

1. Click on the ‘My Account’ module

2. Select ‘My Details’ from the drop-down

3. From here you can proceed to change or update your personal account information including: Name, Email Address, Phone Number, and Account Display Name as shown below.
4. Should you want to stop notifications to the email address associated with the account you may uncheck the notify box to the right of the email box.

5. Once you have filled in all required fields completely, don’t forget to save this information by pressing ‘update’. If you would like to assure that all changes were made you may press ‘test notification’, and receive a response via email.

NOTES:
2.0 REVIEW OF PROCESS:

Registering a client is a process completed by Nursing Home representatives and is a required action in the ProviderGateway site.

The user must have the following information to get started on a Client Registration:

1. Client identifying information: first and last name, SSN, Sex, DOB and Marital Status
2. Client Address: the most recent street address for the client
3. Client Contact: name of a contact including address and phone number (as well as the nature of the relationship of contact to the patient)
4. Requested start date and type of admission (Medicaid, Managed Care (etc.)).

2.1 Brief Overview:

Once this information is processed the client will be eligible for admission in the site. You may take this action once you select the “action” button and choose “admit” from the drop-down.

2.2 Processing Steps:

To register a client:

1. Click on the Client Processing module and select Client Registration.
2. You will see a list of clients, current and past that have been admitted into your facility. Clients who are being currently admitted will have a status of “Pending” if the transaction is not processed by county yet; Past clients, or recently registered but not admitted will have a status of “Available for Admission”; An “Admitted” status notifies the user know they are admitted at a facility.

3. Click on ‘Add Client’ at the top right corner of the screen.
4. The system will generate a search screen which needs a SSN, Last Name and First name. The purpose of this feature is to first confirm if the client is already registered in the system, if so, the system will prompt the nursing home on actions available. This step is necessary to validate for duplicate SSN or last name. If client record is already created proceed to Step 7.

5. Enter required) information (fields preceded by red asterisk) and press search button.
Enter the information required – i.e., SSN, last name, date of birth, and then click on the search icon.

6. Enter primary contact information NOTE: Doing so here will save primary contact data for this client to eliminate the need to input it when processing an admission:

Press ‘Add Contacts’ button to complete any and all information for the client’s primary contact.

Enter all your clients’ contacts personal information preceded by asterisks.

Once completed don’t forget to click save.
7. Resolve Situation Where Patient Not Available for Registration

You will undertake this step only because you searched for a client and found that they are already admitted in ANOTHER facility (or according to an update by another facility, the patient is deceased).

- If the status bar shows that the patient is “Admitted” then you will need to send an “ALERT” in the system so that the other facility can discharge the patient and you can continue. NOTE: FIRST MAKE SURE THEY ARE ADMITTED IN ERROR, AND YOU ARE REGISTERING THE CORRECT SSN.

NOTES:
LEARNING MODULE 3: SUBMIT A CLIENT ADMISSION 9401

3.0 PREREQUISITE:

To proceed with the correct processing and interpretation of actions to process a 9401 in the ProviderGateway-LTC™ system, you must already be familiar with the 9401 process. If you are not, please stop and consult the 9401 process manual for the State of Ohio.

3.1 Review of Process:

Processing a client admission is undertaken by Nursing Homes to submit and admissions 9401 (or “Initial 9401”) for county approval.

The user must have the following information to get started on a Client Admission:

1. Patient identifying information: first and last name, SSN, medicaid number
2. Patient Contact: name of a contact including address and phone number (as well as the nature of the relationship of contact to the patient).
3. Requested start date and type of admission (Medicaid, Managed Care (etc)).

3.2 Brief Overview:

As a result of this process, a transaction will be submitted to the County as an initial 9401, and a “Pending” status will be assigned to that 9401 until the county approves or declines the transaction. A nursing home will only be able to submit an Admission 9401 if the patient is NOT already admitted into another nursing home, or no longer available for admission (e.g., deceased). These statuses are automatically monitored by the system.

When the admission transaction is submitted, the county will either take action on the transaction or put it on “hold”. In either situation, the nursing home will receive a transaction alert with details of additional information (if on hold) or the outcome of the decision. Once the transaction status changes, the nursing home user will be able to view "Approved" or “Declined” status.

3.3 Processing Steps:

To submit an Admission transaction:

1. Click on the Client Processing Module and select “Client Admissions”
2. You will see a list of clients, current and past that have been admitted into your facility. Current clients will have a status of “Admitted” this facility, and Past clients will have a status of “Available for Admission” (not in any other nursing home) or “Admitted” (i.e., they are in another nursing home).

3. Click on “Add [Admission]” on the top right hand corner of the screen. The system will pop up a search screen which needs a SSN, Last Name and First name. The purpose of this feature is to first confirm if the client is already registered in the system and if so, if they are already in another nursing home.

4. Enter the information required – i.e., SSN, last name and date of birth, and then click on the search icon. If a client is already registered in the system with a full or partial match on the information that you submitted, the system will list all matches and ask you to select one that corresponds to or confirms the Admission that you are trying to process.
This step is necessary because there are sometimes duplicate SSN’s, similar names and dates of birth (etc) and we have a chance here to make sure the transaction is submitted for the correct person.

If you have a match AND the patient status displays “Admitted” (i.e., admitted in another facility, then you need to proceed to STEP 4 to take action to resolve the problem, otherwise proceed to STEP 5.

5. Resolve Situation Where Patient Not Available for Admission

You will undertake this step only because you searched for a client and found that they are already admitted in ANOTHER facility (or according to an update by another facility, the patient is deceased).

- If the status bar shows that the patient is “Admitted” then you will need to set an “ALERT” in the system so that the other facility can discharge the patient and you can continue. An alert is a message that notifies whoever the admitting facility is to discharge the patient.

- If the status bar shows that the patient is “Not Available For Admission” then you will need to set an “ALERT” which will be sent to the county to resolve the issue. YOU MUST ALSO FOLLOW-UP WITH THE COUNTY IF THIS HAPPENS.


You will be presented with a 9401 form and will enter all required fields. Required fields are either fields with a red asterisk next to them, or fields that you are prompted for to fill in. Fill in all fields that are required and submit the application. The sections that you must fill in are only those data illustrated in your user guide and include:

(1) Medicaid Benefit Information
(2) Client Contact Information
(3) Type of Admission Information
(4) Comments
7. Preview County Decision.

In the client admission inbox, you will be able to review the decision on this 9401 when the submitted 9401 is processed. Note that, **UNTIL THE ADMIT TRANSACTION IS APPROVED BY THE COUNTY, YOU WILL NOT BE ABLE TO PROCESS ANY TRANSACTIONS ON THIS CLIENT ADMISSION.** Simply click on the magnifying glass to the left of the record to view the completed transaction OR scroll to your action button and select print to view in PDF form.

The county decision will be reflected in the 9401 transactions module and also sent to you via Service Alerts and an Email notification of the decision that was taken on the Admission 9401. Email alerts will be sent to the primary contact of the Nursing Home for ProviderGateway processing; see learning module 8, “Reviewing Alerts”.

**NOTE:** In addition to the 9401 Transaction status, the Eligibility and level of Care updates by the county and are reflected in the 9401 transactions dashboard.
LEARNING MODULE 4A: SUBMIT CHANGE OF ADMISSION 9401

4.0 Review of Process:

To process correctly you must follow these steps:

(1) Go to 9401 Transactions in Client Admissions tab.
(2) Search client
(3) Go to ‘Action’ tab
(4) Select ‘Change Benefit’

4.1 Brief Overview:

As a result of this process you may edit or change the client’s admission type. You may choose from either: Medicaid, Managed care, Medicare, Private Pay, Commercial Insurance, or Short Term Stay.

4.2 Processing Steps:

1. Go to 9401 Transactions under Client Processing tab.

2. Search your client using the utility in the top right corner.
3. Once you have located the client you are looking for, select ‘Change Benefit’ from the Action drop-down. NOTE: A SYSTEM POP-UP WILL PROMPT. MAKE SURE YOUR POP-UP BLOCKER IS TURNED OFF.

4. The system will transfer you to the screen below where you can go about changing the type of admission for your client.
5. Click on the “Add Admission Type change” Icon.

6. Select one of the seven admission types (Managed care, Medicaid, Medicare, Private Pay, Commercial Ins, or Short Term Stay) by checking the box to the right of the field. Then proceed to choose a ‘begin date’ by either typing in a two digit month, two digit day, and four digit year or pressing the calendar to the right of the blank box. Once this step is completed enter any comments that may apply and **click save to correctly complete this process**.

7. The transaction will remain in “Pending” status until it is processed by the Medicaid Unit.
LEARNING MODULE 4B – SUBMIT CHANGE OF INCOME 9401

2.0 REVIEW OF PROCESS:

This module will allow you to submit any change of income information related to the resident. This income information should be relevant for this current admission ONLY and should not include any information related to previous admissions.

1.1 BRIEF OVERVIEW:

If the income status of the resident changes during the admission you are required to notify the county via the 9401 Transmittal Form.

1.2 PROCESSING STEPS:

1. Select 9401 Transactions from Client Processing tab.

2. Search client name and from the ‘Action’ icon choose Change Income icon. NOTE: ProviderGateway utilizes a Pop-up here, MAKE SURE YOUR BLOCKER IS TURNED OFF (or Pop-ups are allowed from ProviderGateway).

3. Select ‘Add Change Income/Patient Liability from the Change Income tab

4. The system will bring you to the Change Income/Patient Liability Details screen where you can then update your client details. Choose whether it is an increase, decrease or no amount change.
and then continue with all other required fields (amount, effective date, and comments). You are given the option to add an attachment if necessary but this is not a requirement.

5. **Once you have filled in all required fields press ‘save’**. The system will then redirect you to the previous page (below) and you’ll have the option to then alert the Medicaid Unit of this change by using the Action drop-down NOTE: They will already receive the change 9401 in their inbox. We encourage the Alert to be used as more of a reminder/update if there isn’t any change during the allotted processing times.
6. Once completed, the transaction will remain in “Pending” status until it is received and processed by the Medicaid Unit.

NOTES:
LEARNING MODULE 5: COUNTY INITIATED LIABILITY CHANGE

5.0 PREREQUISITE:

To proceed with the correct processing and interpretation of actions to process a 9401 in the ProviderGateway-LTC™ system, you must already be familiar with the 9401 process. If you are not, please stop and consult the 9401 process manual for state of Ohio.

5.1 Review of Process:

Processing a change in Patient Liability is undertaken by the County Case worker. The user must have the following information to get started on a Liability Change:

   1. Access to ProviderGateway-LTC™ system with County Case Worker privileges
   2. Patient identifying information: first and last name, SSN, Medicaid number (if applicable
   3. Patient Liability information (amount(s), Begin Date(s)

5.2 Brief Overview:

The county case worker is able to edit Liability information during EVERY 9401 transaction in ProviderGateway. As the case worker receives income change information, or any change that relates to a Patient’s Liability they may from time to time need to notify the NH of a change separate from their 9401 inbox. This training section is designed to teach you how to notify the NH of a liability change if you (as a county user) are initiating the transaction.

5.3 Processing Steps:

To submit a Liability change transaction:

1. Scroll under Client Processing and choose County 9401 Transactions/9401 Transactions.
2. Locate Client via the “Search” module located at the top of the page.

3. Once you have located the Client you require to make a change on scroll your cursor over the blue underlined “Action” button and select “Change Liability.” NOTE: Only when a resident is Approved and Admitted to a facility will this action be available to you. This module utilizes a pop-up window, make sure ProviderGateway pop-ups are allowed in order to view the upcoming module.

4. You are now at the module titled “9401 Transactions” (or County 9401 Transactions if county user). Select the blue “Add Change Income/Patient Liability” located above the 9401 records for the client.

5. You are now ready to create a 9401 transaction. From this module you will be able to edit income information if needed- however, if you would only like to edit liability information then select “no change” for Change of Income Type and enter the date.
6. Now you can proceed to the County Information section. You will need to select one of the four options regarding the action on this 9401 (Approved, Declined, Changed, Closed) and also enter a comment pertaining to the action.

7. Now scroll to the bottom of this page to enter the liability details. Now use your mouse to click on the blue “Add Patient Liability” button. You are required to ATLEAST enter the Begin Date and amount; now click save. This information will print to one of the three available Patient Liability lines located on the Facility Transmittal 9401.

8. Always remember to click “Save” at the bottom of the 9401 transaction screen to save the transaction. Once you hit save, the corresponding agency will be forwarded an alert that a transaction was made on this resident. You will be able to now view the record under the “History” or “Change Income” tabs.

NOTES:
LEARNING MODULE 6: SUBMIT A CLIENT DISCHARGE 9401

6.0 PREREQUISITE:

To proceed with the correct processing and interpretation of actions to process a 9401 in the ProviderGateway-LTC™ system, you must already be familiar with the 9401 process. If you are not, please stop and consult the 9401 process manual for state of Ohio.

6.1 Review of Process:

Processing a client discharge is undertaken by Nursing Homes to notify a change in status to the county. The county case worker also has the ability to discharge a resident in ProviderGateway just as a nursing home would.

The user must have the following information to get started on a Client Discharge:

1. Patient identifying information: first and last name, SSN, medicaid number (if applicable)
2. Patient Discharge Information: Date, Type of discharge, discharging facility info (if applicable)

6.2 Brief Overview:

As a result of this process, a resident will become available to other nursing homes UNLESS DEATH IS SELECTED. Once the discharge is processed the resident will have a status change from “Admitted” to “Available for Admission.” The discharge in ProviderGateway (like the admission) mimics the physical process the resident goes through. Discharge transactions should be processed in a timely manner because once a resident is Admitted under a facility, NO OTHER FACILITY CAN SUBMIT A 9401 on that resident. If you have a resident that is physically discharged to another facility, that admitting facility will need to be able to virtually admit the resident in ProviderGateway to properly submit any corresponding 9401’s on that resident.

6.3 Processing Steps:

To submit a Discharge transaction:
Scroll under Client Processing and choose 9401 Transactions.

1. Locate Client via the “Search” module located at the top of the page.

2. Once you have located the Client you require to make a change on scroll your cursor over the blue underlined “Action” button and select “Discharge.” NOTE: Only when a resident is Approved and Admitted to a facility will this action be available to you. This module utilizes a pop-up window, make sure ProviderGateway pop-ups are allowed in order to view the upcoming module.

3. You are now viewing the 9401 transactions for this resident. Since you have selected “Discharge” you are already on the discharge tab. To report Discharge information, locate and select the “Add Discharge Details” button.
4. Enter the Discharge Type and Discharge Date. NOTE: If Discharge Type “Death” was selected then Deceased Date will also need to be selected. If resident was discharged to another facility than you will need to enter the facility information.

5. You will need to enter a comment at the bottom of the screen and hit save.

NOTES:
LEARNING MODULE 7: SUBMIT A ONE TIME PAYMENT

7.0 PREREQUISITE:

To proceed with the correct processing and interpretation of actions to process a 9401 in the ProviderGateway-LTC™ system, you must already be familiar with the 9401 process. If you are not, please stop and consult the 9401 process manual for state of Ohio.

7.1 Review of Process:

Processing a One Time Payment is an action done by the nursing home worker. The user must have the following information to get started on a One Time Payment:

(1) Patient identifying information: first and last name, SSN, Medicaid number (if applicable)

(2) Admission Information (Date, Type); Discharge Information (Date, Type)

7.2 Brief Overview:

The One Time Payment is setup in ProviderGateway for the nursing home worker to be able to submit a 9401 for services rendered from one period of time. This resident has already been discharged from your facility and you wouldn’t traditionally go through the traditional admit/discharge process.

7.3 Processing Steps:

To submit a One Time Payment transaction:

1a. You can enter the One Time Payment Module from the Client Registration screen:

1b: If you were trying to register/admit the client and they are already admitted into another facility (or unavailable)- the system will prompt two actions for you: 1. Alert admitting facility 2. Submit One Time Payment
2. If you were able to locate the client from your registration list continue (otherwise option 1b applies) to your action button and select “One Time Payment.”

3. To submit the One Time Payment you would need to enter all information as you normally would for an admission and a discharge. First select Medical Benefit and Primary Contact Details.

4. Once you have selected the Primary Contact Information the next section pertains to the Admission information. Enter the Date of Admission, where they were transferred from, and the Type of Admission (and the begin Date of the healthcare type)
5. The next section pertains to the discharge information. You will need to submit the same information as you would a normal discharge: date, type, facility information (where applicable) and finally a general comment regarding why you are submitting for a one-time payment.
LEARNING MODULE 8: SERVICE ALERTS

8.0 PREREQUISITE:

The service alert system is built to act as a confidential communications channel (think of this as if it were a private, secure e-mail system limited to access qualified/registered users only) for users to communicate sensitive information between two parties through our secure system.

8.1 Review of Process:

Processing a Service Alert is undertaken by the County Case worker. The user must have the following information to get started on a Service Alert:

(1) Patient identifying information: First or Last Name, User name (if applicable)
(2) Content of Message

8.2 Brief Overview:

Service Alerts are messages transmitted between two parties in ProviderGateway. Service Alerts are kept internal to maintain the same security standards throughout the site. There are two types of alerts:
1. System Generated Alert- The system alert is automatically generated when the status of a resident changes. The admitting facility is immediately notified of a status change via e-mail. 2. User Generated Alert- User generated message to communicate between two parties, e.g., from Nursing Home to County, or Nursing Home to Nursing Home, or County to Nursing Home.

8.3 Processing Steps:

There are several ways to send an alert:

1a: The Client Admissions module allows you to submit an alert based on a client. Simply choose the client you would like to alert the case worker for, select your reason for the alert, and write your comment. Please be specific in your request to ensure the best feedback.
1b: The 9401 Transactions module allows you to submit an alert based on a client. Simply choose the client you would like to alert the case worker for, select your reason for the alert, and write your comment. Please be specific in your request to ensure the best feedback.

1c. Other areas where you can initiate an alert: Client Registration, One Time Payment, Facility Directory.

2. To respond to an alert scroll to the Client Processing tab and select Service Alerts.
3. NOTE: VERY IMPORTANT- ProviderGateway allows all users in the same location to view/respond to alert. This is to ensure sensitive information is received by the facility regardless of employee turnover, vacation, sick days, etc. What this means is you need to “search” for an alert just as you would a client elsewhere in the system. Example: If you want to view all facility alerts make sure the “Alerts assigned to me only” box is unchecked.

4. To respond to an alert awaiting your response scroll to your Action button and select “Respond to Alert.”

5. You can now view the Alert which includes: Client name, Alert Date, User comments. You will also be able to respond and submit.

NOTES: