PPO Customer Service Training

Module 19:
Claims Exchange

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PAC0479896

Claims Exchange

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Claims Exchange

Overview

The purpose of this module is to explain how to use Claims Exchange when the CCP can not locate a claim in QicLink.

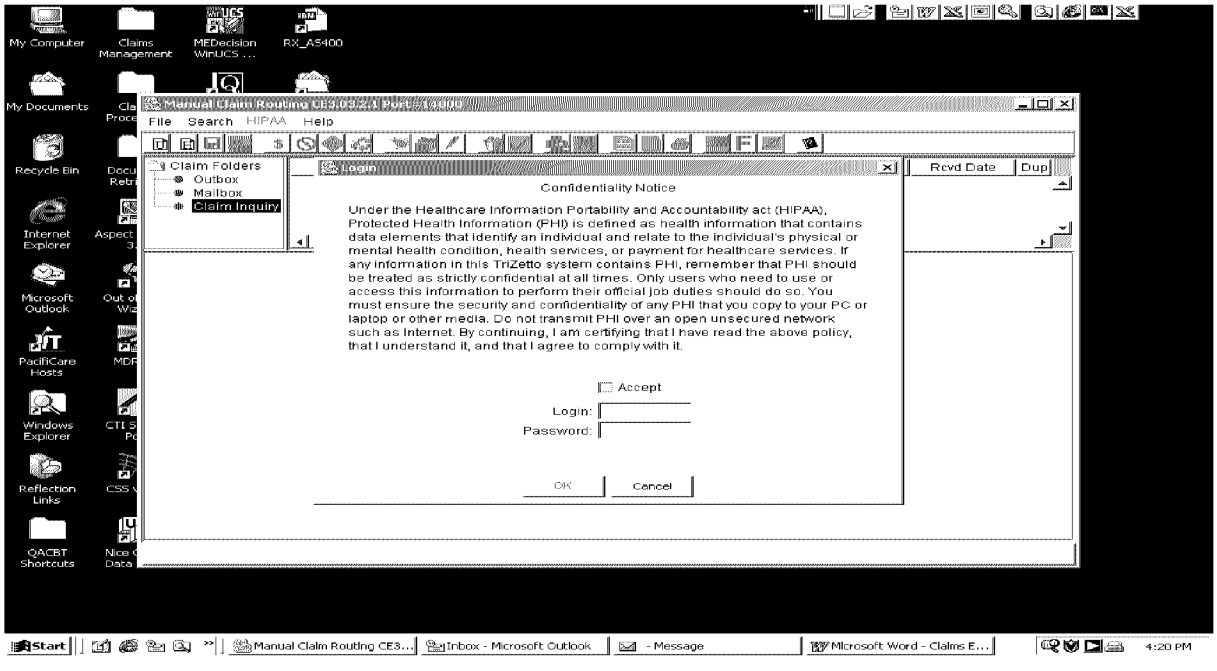
What is Claims Exchange

Claims Exchange is a system used by the claims department to pay and route claims with the appropriate contract attached for payment.

How to Access Claims Exchange

To access the Claims Exchange system, the CCP will:

Step	Action
1	Click on the *Start* button on his/her desktop.
2	Click on *Programs*.
3	Click on *Claims Exchange*.
4	Click on *Claim*.
5	Once the system comes up, click on the **Claim Inquiry** option.
6	A log on box will appear. Click on *Accept*, and enter your assigned Log In and Password.



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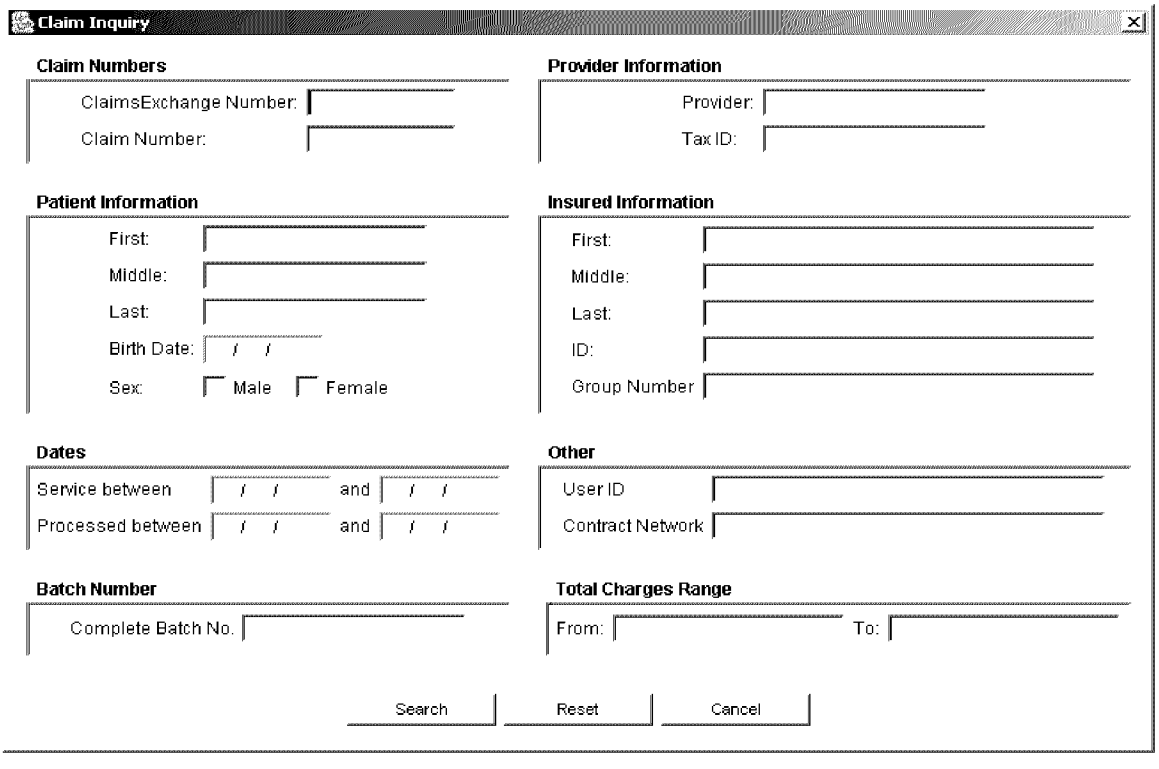
Checking Claim Status

Once the CCP has logged into Claims Exchange, the CCP will take the following steps to see if PacifiCare has received a claim:

Step	Action
1	Fill out the following information on the search box that appears when logged in: • Insured's first and last name • Birth Date • Service date(s) of the claim in question (Put a date range in the fields on the *Services Between* line. I.E. 09/01/2003-09/30/2003) • Total Charges (Type a price range in the *From* and *To* field. Include the decimal place and cents in the dollar amount. I.E. 1.00 – 500.00)
2	Click on **Search**.



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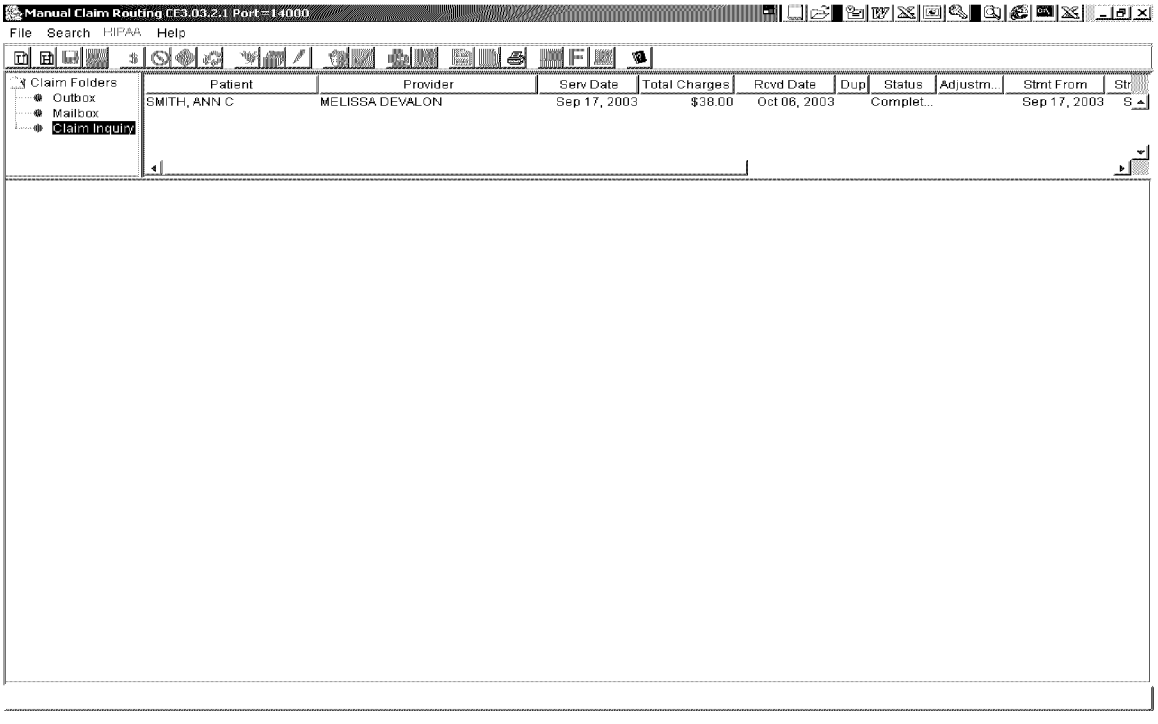
Quoting Status

If the claim is in Claims Exchange the CCP will locate the *Received Date* column and quote the following:

- Date PacifiCare received the claim
- Advise the claim is in process and to allow 30 days from the date received to finish processing



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View Claim Form

To view the claim form submitted, the CCP will double click on the display line. The system generated claim form will appear.

Manual Claim Routing CE3.05.1.1 Port=14112

File Search HIPAA Help

Claim Folders: Outbox, Mailbox, Claim Inquiry

Patient	Provider	Serv Date	Total Charges	Rcvd Date	Dup	Status	Adjusted...	Stmt From	St
SMITH, ANN	GERI MCCRAY	Jun 10, 2003	$380.00	Jun 25, 2003		Completed		Jun 10, 2003	

Received: 06/25/2003 Claim No. CPA03340PH08.C0

non-contract provider

CARRIER:

1. MEDICARE MEDICAID CHAMPUS CHAMPVA GROUP FECA OTHER

1a. INSURED'S I.D. NUMBER: 670480094

2. PATIENT'S NAME (Last, First, MI): SMITH ANN

3. PATIENT'S BIRTHDATE: 10/30/1938 SEX: M F

4. INSURED'S NAME (Last, First, MI): SMITH ANN

5. PATIENT'S ADDRESS POS 75939e: 1588 LOS AMIGOS AVENUE

SIMI VALLEY CA

ZIP CODE: 93065 TELEPHONE:

6. PATIENT RELATIONSHIP TO INSURED: Self Spouse Child Other

8. PATIENT STATUS: Single Married Other Employed F/T Student P/T Student

7. INSURED'S ADDRESS POS 75939e

ZIP CODE TELEPHONE

9. OTHER INSURED'S NAME (Last, First, MI)

a. OTHER INSURED'S POLICY OR GROUP NUMBER

b. BIRTHDATE / / SEX: M F

c. EMPLOYER'S NAME OR SCHOOL NAME

d. INSURANCE PLAN NAME OR PROGRAM NAME

10. IS PATIENT'S CONDITION RELATED TO:

a. EMPLOYMENT? (CURRENT OR PREVIOUS) YES NO

b. AUTO ACCIDENT? YES NO PLACE (State)

c. OTHER ACCIDENT? YES NO

10d. RESERVED FOR LOCAL USE

11. INSURED'S POLICY OR GROUP NUMBER: PS143941

a. BIRTHDATE: 10/30/1938 SEX: M F

b. EMPLOYER'S NAME OR SCHOOL NAME: RAYTHEON CO/RET <65/UNI PL

c. INSURANCE PLAN NAME OR PROGRAM NAME: RAYTHEON CO/RET <65/UNI PL

d. IS THERE ANOTHER HEALTH BENEFIT PLAN? YES NO

12. PATIENT OR AUTHORIZED PERSONS SIGNATURE PATIENT SIGNATURE DATE / /

13. INSURED OR AUTHORIZED PERSONS SIGNATURE

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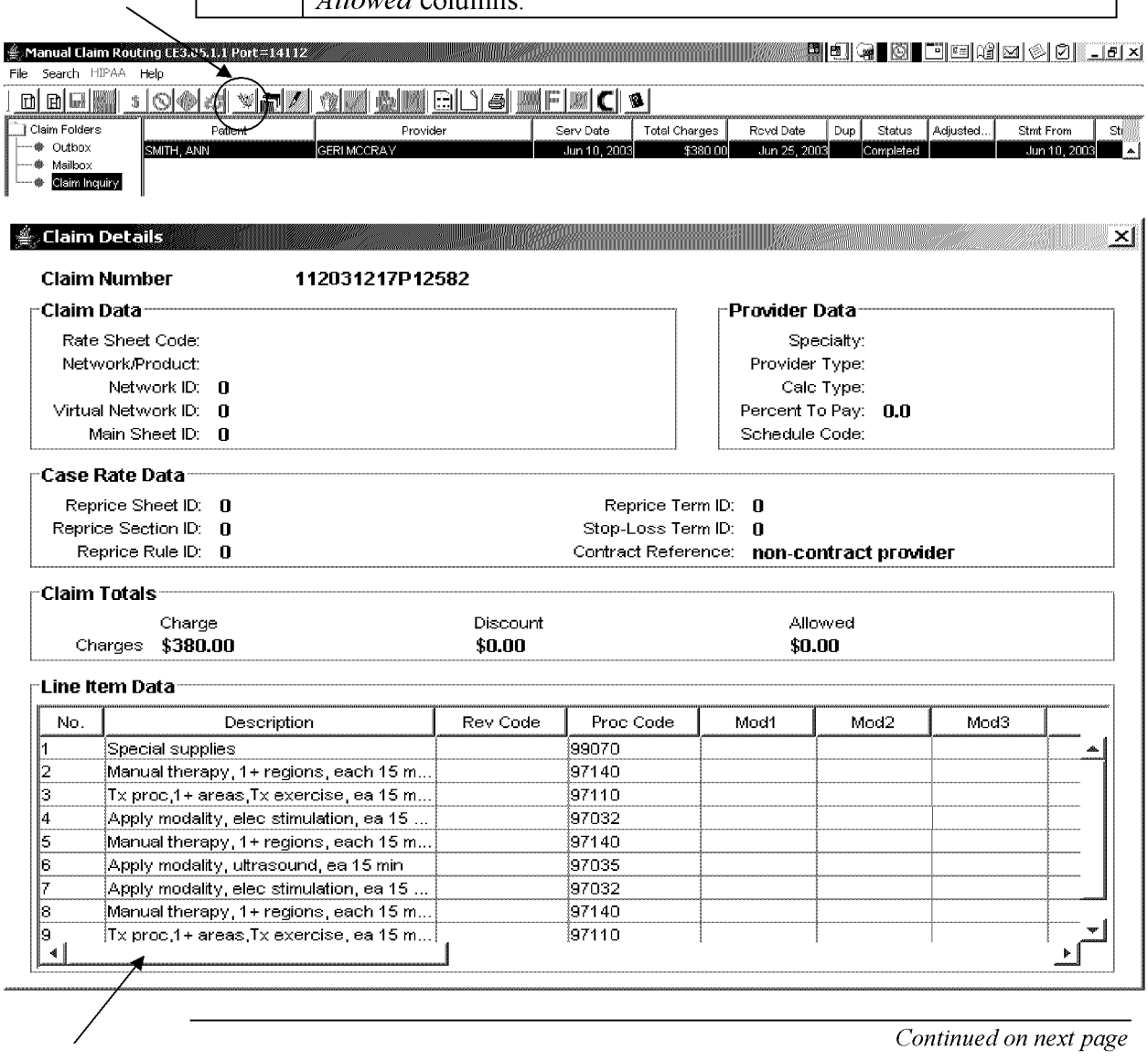
Display Re-pricing Details

The CCP can view discounts/contracted rates that will be applied to claims in Claims Exchange using the *Display Re-pricing Details* button. To view this information the CCP will:

Step	Action
1	Click on the *Display Re-pricing Details* button at the top of the screen. A screen titled *Claim Details* will appear.
2	Using the scroll bar at the bottom of the Claim Details screen, scroll over to locate information listed in the *Discount* and/or *Allowed* columns.



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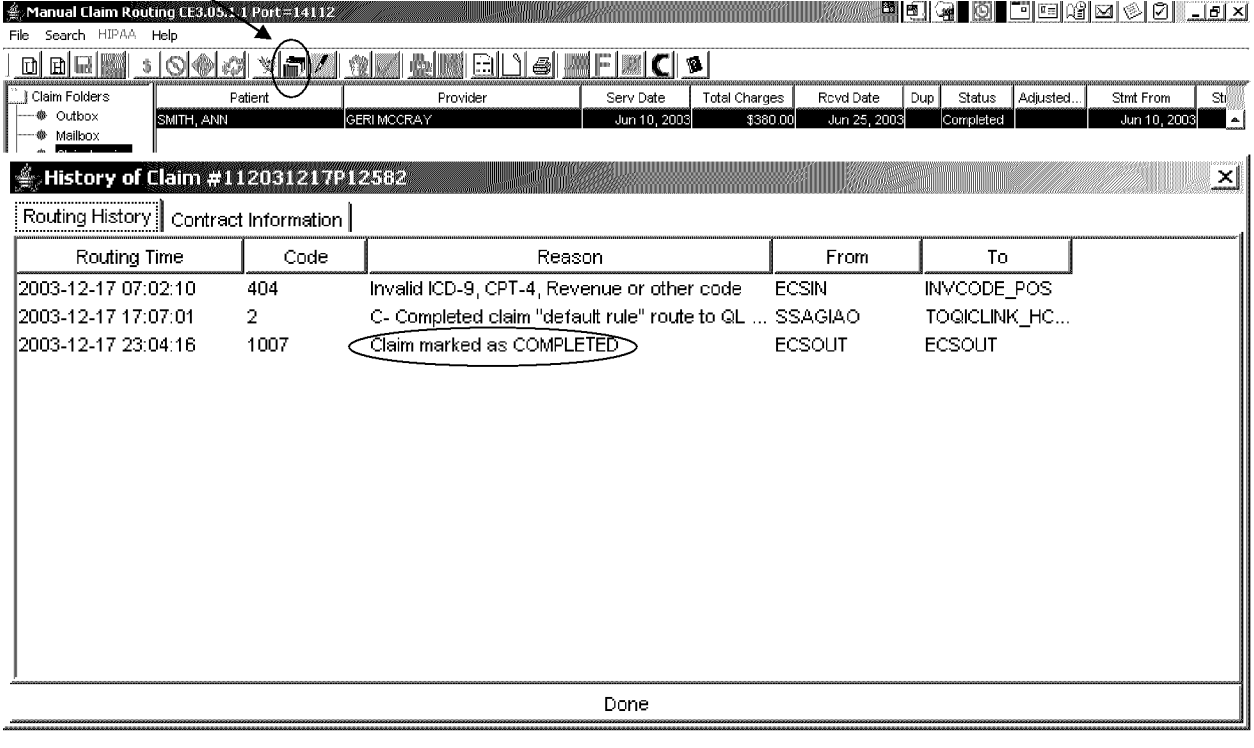
Display Claim History

The CCP can view history notes on a claim in Claims exchange using the *Display Claim History* button. The CCP will need to reference this to determine if he/she needs to take further action when a claim has been in Claims Exchange over 30 days and is not in QicLink. To view this information the CCP will:

Step	Action
1	Click on the *Display Claim History* button at the top of the screen. A screen titled *History of Claim #* ******** will appear.
2	Attempt to locate the phrase "Claim marked as COMPLETED". Use the table below to determine the next step.

If the phrase listed above…	Then the CCP will…
IS listed in the History comments and it has been in claims exchange over 30 days from the received date	Follow the instructions listed in the section titled *Over 30 days* in this module. (page 10)
Is NOT listed in the History comments	Advise the caller the claim is still processing and to allow more time.



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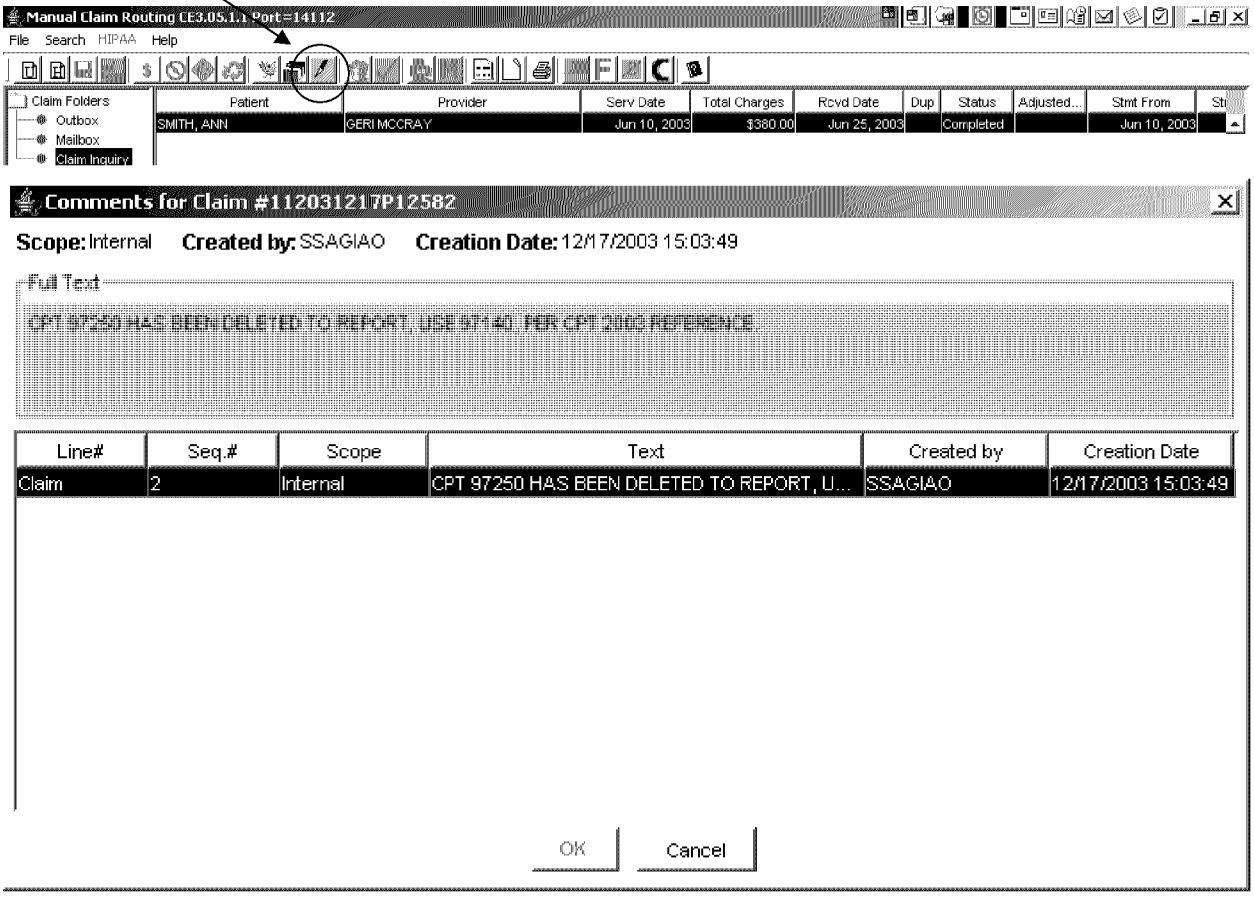
Display Comments

The CCP can view comments on a claim; including but not limited to reasons for ineligible amounts, contract information, etc. This information will not display in the claim notes in QicLink nor on the EOB once the claim is processed. To view this information the CCP will:

Step	Action
1	Click on the *Display Comments* button at the top of the screen. A screen titled *Comments for Claim #* ********* will appear.
2	Read the information in the *Text* column.



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Over 30 days

If it has been over 30 days since PacifiCare received the claim and it has not been transferred to QicLink for final processing, the CCP will contact his/her supervisor for direction.

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Claims Exchange Skillcheck

1) What does the Claims Exchange system do?

2) When does the CCP access Claims Exchange?

3) Can the CCP type the exact date of service of the claim in the *Service Between* line on the search screen?

4) What information does the CCP quote from Claims Exchange?

5) What does the CCP do if the claim has been in Claims Exchange over 30 days and has not been processed yet?

6) What information needs to be entered in the search screen to locate one specific claim?

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7) Locate the following claim in Claims Exchange:
Member- Drucilla Redwine
Date of Birth- 10/15/1949
Date of Service- 9/14/2004
Provider- Dr. Stuart Slamowitz
Amount- $75

When was the claim received in Claims Exchange?

8) Locate the following claim in Claims Exchange:
Member- John Quinn
Date of Birth- 9/3/1953
Date of Service- 5/9/2005
Provider- Valley View Hospital
Amount- $1346.08

When was the claim received in Claims Exchange?

9) Locate the following claim in Claims Exchange:
Member- Janice Anderson
Date of Birth- 9/4/1951
Date of Service- 4/6/2005
Provider- Philip Weber
Amount- $175

When was the claim received in Claims Exchange? What action, if any, would the CCP take?

10) Locate all claims for the following member in Claims Exchange:
Member- Melinda Rushing
Date of Birth- 1/15/1975

What is the most recent claim received in Claims Exchange? (list the date of service, provider, amount, and received date)

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