Home Health Care
Managing Pre-Claim RCD Submissions

Summary: *The Document Storage feature module allows agencies to create automatic tags for Pre-Claim RCD-required documents. Users can quickly filter stored documents to download RCD tagged items into a zip file for submission to the MAC portal.*

Contents

Background

Review Choice Demonstration (**RCD)** is a regulatory initiative meant to reduce improper billing by requiring providers to undergo pre-claim review or post-payment review, among other options. The demonstration helps ensure that the right payments are made at the right time, protects Medicare funding from improper payments, reduces the number of Medicare appeals, and improves provider compliance with Medicare program requirements.

RCD for Home Health Services will give providers in the demonstration states an **initial choice of three options**:

- Pre-Claim Review (PCR)
- Post-Payment Review
- Minimal Post-Payment Review with a 25 percent payment reduction for all home health services

If the home health agency's full affirmation rate or claim approval rate is 90% or greater for a minimum of 10 claims or requests for the 6-month period, they may choose one of the subsequent review options:

1. Start or continue participating in PCR for another 6-month period
2. Selective post-payment review of a statistically valid random sample (SVRS) of claims every 6-months, for the remainder of the demonstration; or
3. No review, other than a spot check of 5% of their claims every six months to ensure continued compliance

Most agencies choose Pre-Claim review due to its limited set of documentation. Also, if MAC approves pre-claim reviews, agencies are assured of reimbursement.

Resources:

CMS Review Choice Demonstration Web Page

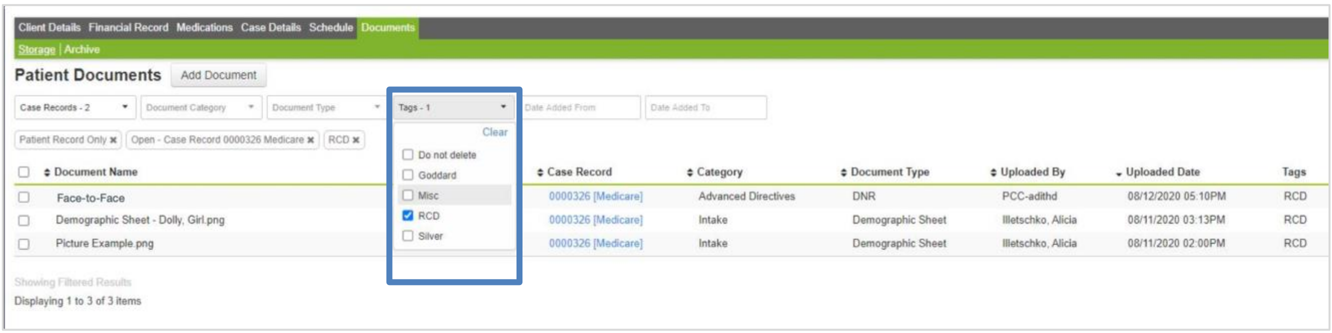
CMS Review Choice Demonstration for Home Health Services Guide

Palmetto Home Health and Hospice Review Choice Demonstration Education Resources

Pre-Claim RCD Submission Overview

RCD does not create new documentation requirements. Agencies will submit the same information they are currently required to maintain for payment.

The Pre-Claim RCD review process leverages Document Storage features to allow users to automatically tag document types for RCD compliance and download a patient's tagged documents into a zip file for submission to the MAC portal using the supplied secure channel.



Document Storage Features:

- Tags and document types are set up at the Admin Setup level
- Patient records include a Documents tab that allows users to quickly and easily attach documents related to a patient/case and efficiently view, download, edit, and filter attachments
- Attach documents to the Patient record or the individual case
- Flexibly designed for use according to agency policies and procedures
- Supports multiple document types, including agency-defined types
- Filters and sortable columns for easy access to targeted documents, including RCD tagged documents
- Actions displayed are dependent on user permissions
- Supports documents in pdf, jpeg, jpg, and png formats
- Maximum file size: 20MB - to be expanded in the future to 49 MB

Pre-Claim RCD Submission Management Using Document Type Tags

Design your agency document type RCD tagging structure

- Review pre-claim RCD requirements and outline which documents your agency will submit.
- Determine which document types require tagging based on your agency's RCD submission plan, and then create the RCD tag and apply it to the document types.

Ensure required documents are uploaded to patient Document storage

Download documents to your system and upload them to the Document tab, being sure to assign a document type.

Note: Workflow efficiencies are planned in the near future.

To submit a patient's documents for RCD, create a zipped file of required documents and upload to MAC

1. Filter patient's stored documents for the RCD tag

On the patient record Document tab, click the Tag filter and select the RCD tag.

2. Bulk download tagged documents into .zip file

Select all required documents from the filtered list and click Download.

3. Submit .zip file to MAC via a secure file.

Follow your agency's procedures to upload the zipped file of the patient's RCD documents to the MAC portal.

4. After receiving the RCD decision, enter the UTN number on the final claim.

Claims submitted to CMS without a UTN number risk a 25% reduction in reimbursement. Be sure to enter the UTN number BEFORE final claim submission.

Create RCD Tag and Assign to Document Types

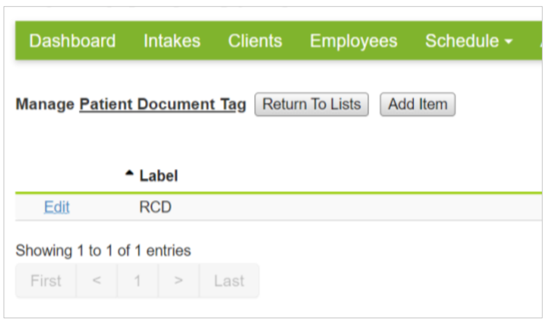
Using Document Storage, you can create an RCD document tag and specify document types to which the system should apply it. Tags are useful when you know there are certain document types that you need to quickly access, for example, as part of your agency's RCD strategy.

Create and Enable Tags

Procedure

1. With Admin user privileges, go to **Administration > Lists** and click **Manage Items** for the **Patient Document Tag**.

2. Click **Add Item** to create the RCD tag. Click **Edit** to enable the tag or change the label.

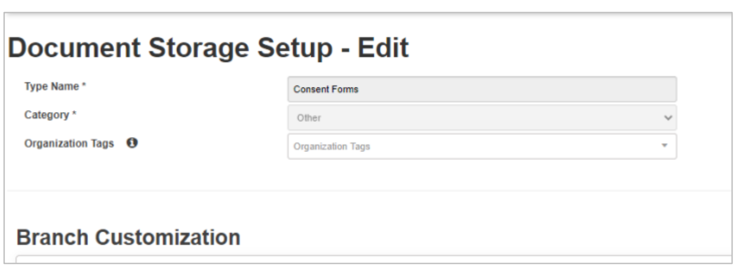


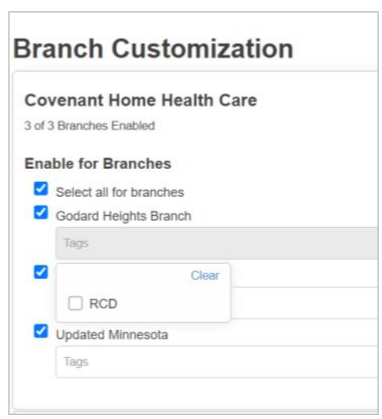
Apply RCD Tag to Document Types

Procedure

1. Go to **Administration > Document Setup**. For the Document Type, click **Edit**.

2. Assign the RCD tag to the document type either at the organization level or for individual branches. (Tags applied to organizations apply to all branches.)





Tip: Your Agency database comes with a selection of Document Types. If you need to create Document Types, see **Option: Create Document Types**.

Set up Document Storage Security Roles

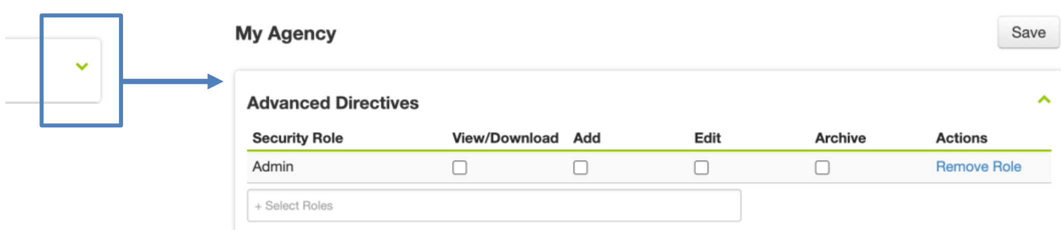
Agency staff who manage RCD submissions need security access to view/download, add, and archive documents. Agencies should determine who will manage the RCD submission process and work with the agency admin to set up the applicable security access to documents stored in patient Documents tabs.

Procedure

1. With Admin user privileges, go **Administration > Document Setup** and select the **Security and Roles** tab.

2. For each charting area:

   a. Click the down arrow to open the chart area options.

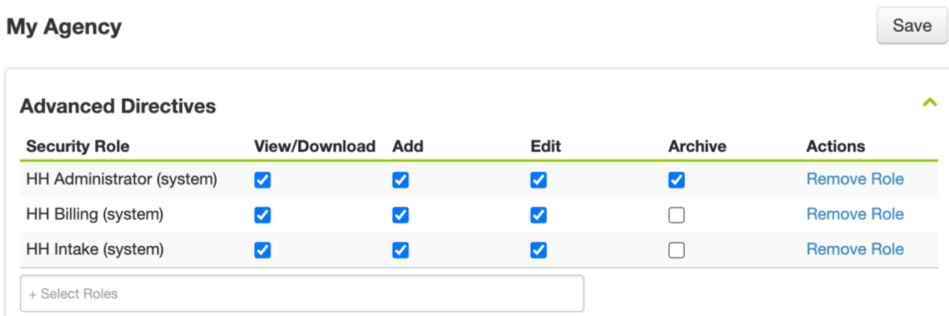


   b. Click in the **Select Roles** field and begin typing a role name. Choose a role from the list. (Multiple roles are allowed.)

   Tips:

   - We recommend setting up administrators with all privileges and chart areas.
   - Remember that Home Health Care system roles always begin with HH (examples: HH Administrator, HH Billing, HH Intake).

c. Select the privileges each role needs (View/Download, Add, Edit, and Archive). We recommend View/Download, Add, and Edit privileges for staff managing RCD submissions.



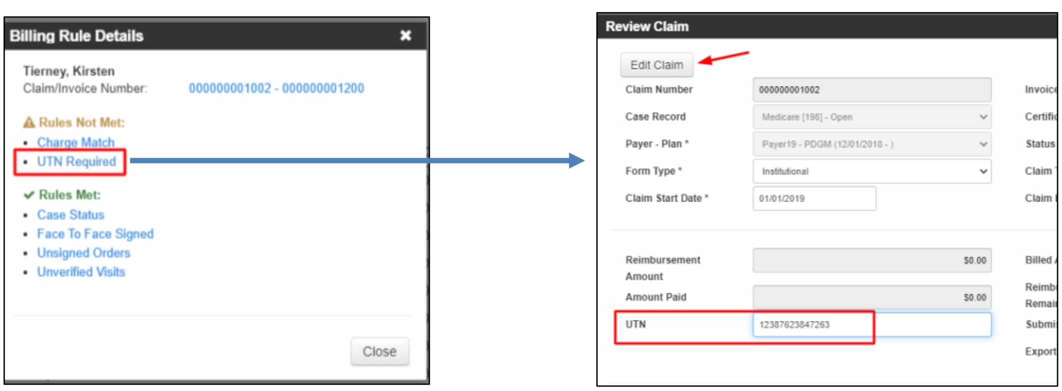
d. Continue adding security roles for each chart section.

3. When the Security Role setup is complete, click **Save**.

Add the UTN Required Clinical Configuration Rule

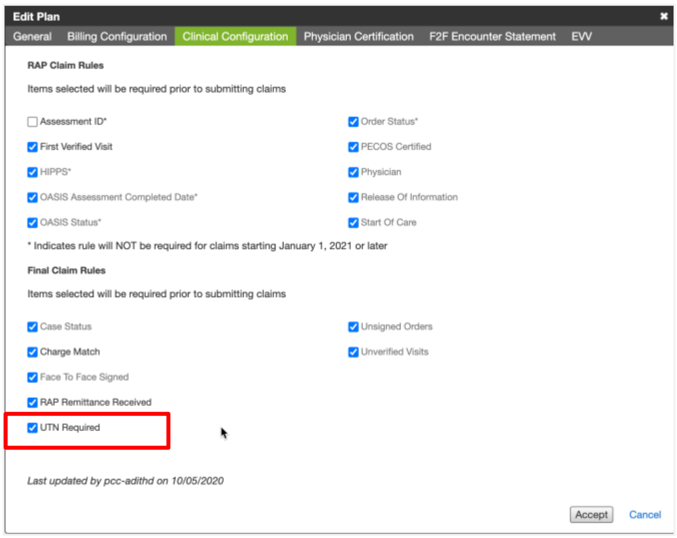
When you receive the RCD decision from MAC, you must enter the UTN number into the patient's final claim BEFORE submitting the claim to CMS. Claims submitted to CMS without a UTN number risk a 25% reduction in reimbursement.

The Home Health Care solution allows you to set a configuration rule in your payer/plan set up to recommend entry of a UTN number before submitting a claim. When you set up this rule, UTN Required appears as a billing rule in the billing queue. You can easily click the billing rule, click Edit Claim, and enter the UTN number.



Setting the UTN Required rule

1. With Admin user privileges, go to **Administration > Payers**.
2. Click **Manage Plans**.
3. Click **Edit** for the plan you need to change.
4. On the Clinical Configuration tab, select **UTN Required** and click **Accept**.



Upload Required Documents and Assessments into Document Tab

You must store documents in the patient's Document tab to use the RCD tag to create a submission package. Where your documents are currently stored and how your agency receives them depends on your agency's operating procedures. Refer to **Downloading items for Document Storage**.

You can also download the required documents and create an RCD package outside the Documents storage tab. However, setting up RCD tagging and procedures using the Document tab will allow you to take advantage of coming efficiency improvements.

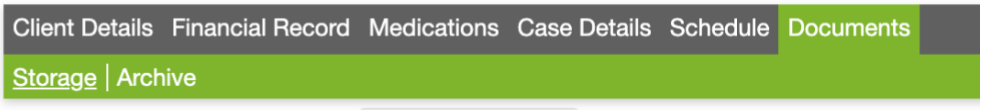
Uploading items to a patient's Document tab

Use the following procedure to upload items to a patient's Document tab. Also see **Downloading items for Document storage**.

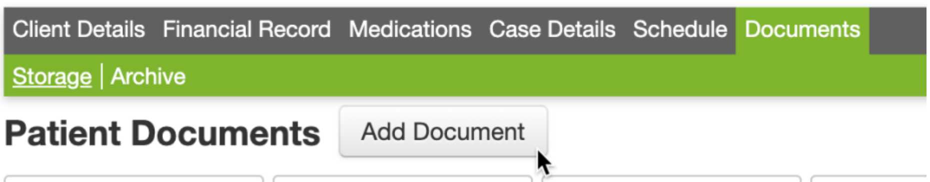
Procedure

1. Navigate to the patient's chart.

2. Click the **Documents** tab.

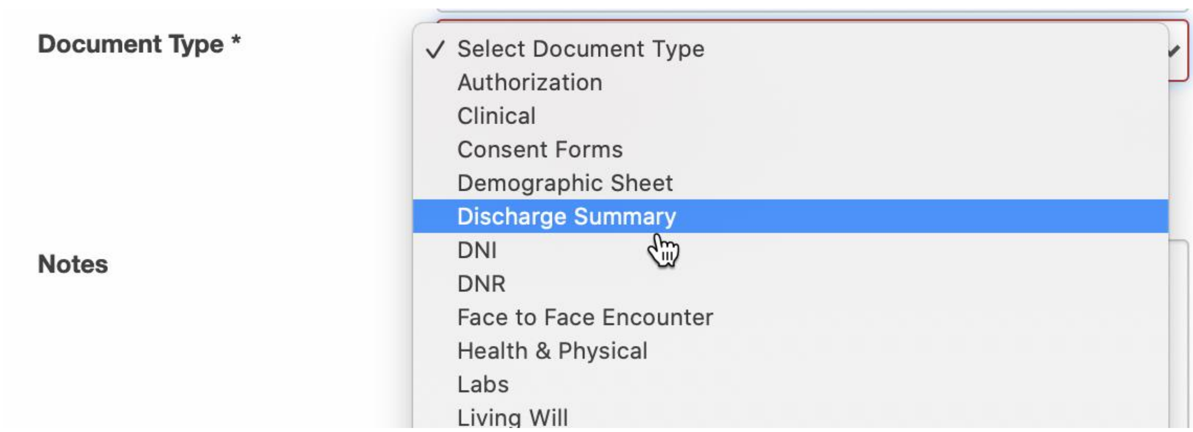


3. Click **Add Document**.



4. Click **Browse**, select a document from your system, and click **Open**.

5. Click the **Document Type** field to select from a list of types.



IMPORTANT: Document types must have an RCD tag applied to create an RCD submission package.

6. Enter **Notes** if required.

7. Click **Accept**.

Downloading items for Document Storage

Documents may need different procedures depending on your system configuration and agency practices. The following table outlines the most common scenarios.

Documents originating from outside the agency (for example, F2F Encounter notes and Discharge Summary from another facility)	**For documents attached to the patient record -** Navigate to the patient chart and go to **Case Details > Charting**. Select the document and click the **Attachments** tab. Download the PDF and upload it to the **Documents** tab. **For documents received from a secure email -** Download the document to a location on your system, and upload it to the patient's **Documents** tab. **For documents received fax -** Scan the document, save it to a location on your system, and upload it to the patient's **Documents** tab.
Assessments, Visit Notes, and Evaluations	Must be downloaded as a PDF to your system and then uploaded to the patient's Document tab. 1. Navigate to the patient record and go to **Case Details > Charting**. 2. For the required document, click **Print**. 3. Select **Entire Assessment** and click **Generate PDF & Print**.  4. **Save** the PDF to your system. 5. Upload the PDF to the patient's **Document** tab.
Signed Orders	**Existing patients:** **For signed orders attached to the case record,** navigate to the patient chart, and go to **Case Details > Charting**. Select the Document and click the **Attachments** tab. Download the PDF, and upload it to the Document tab. **New Patients:** • **If using Forcura** 1. Navigate to the patient record and go to **Case Details > Orders**.

2. Select the **Signed** tab and click the **Signed** link. This action takes you to the signed order stored in Forcura.

3. Download the order from Forcura.

4. Upload the signed order to the patient's **Document** tab.

- **If not using Forcura**

  From a secure email, download the document to a location on your system, and upload it to the patient's Document tab. From a fax, scan the document, save it to a location on your system, and upload it to the patient's Document tab.

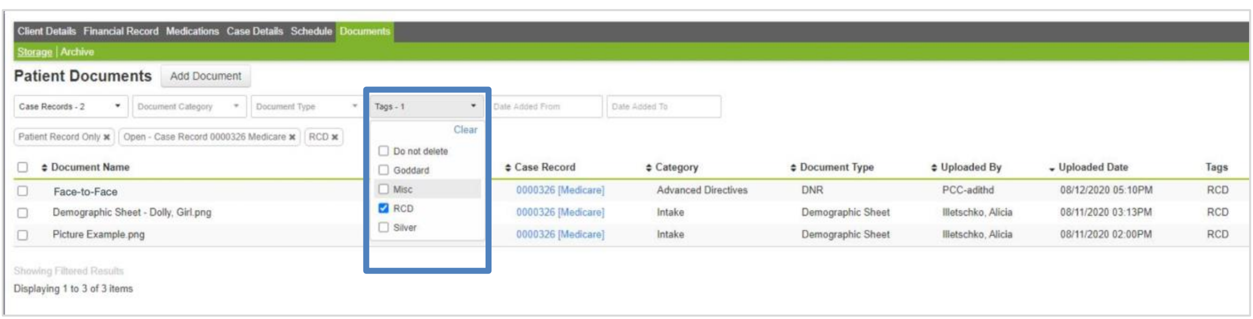
Filter for RCD Tags and Bulk Download Documents

You can filter a patient's Documents to list only those with RCD related tags, and then select the required documents and download them to a .zip file for uploading to the MAC portal.

Procedure

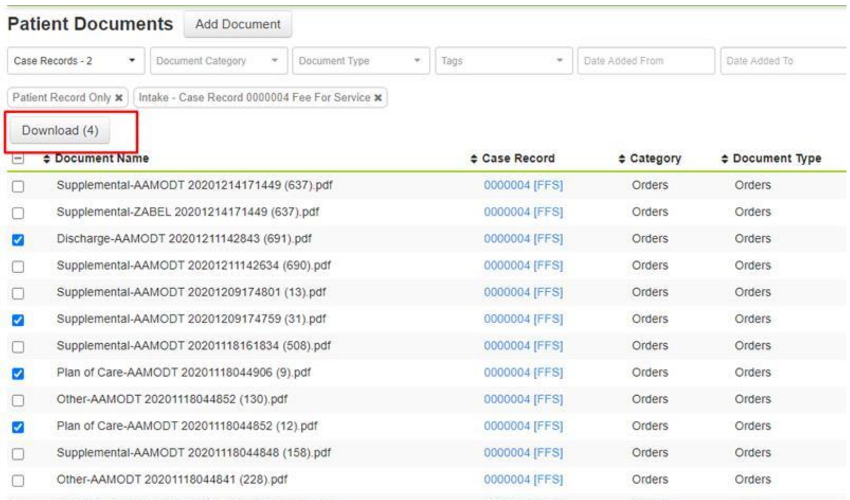
1. Navigate to the patient's record and select the **Documents** tab.

2. Click the **Tags** field and select the RCD related tag. (Multiple selections are allowed.)



3. Select the documents that you want to include in the download file.

4. Click **Download**. Bulk downloaded documents are available in a zip file that you can open or send via a secure channel. You can download up to 25 documents at a time.



Tip: You must have Download permission to download documents. An error message appears if you do not have download permission for any of the selected document types. Speak to your system admin if you need changes to your user permissions.

Upload Zip File to MAC Portal and Manage Returned UTN Number

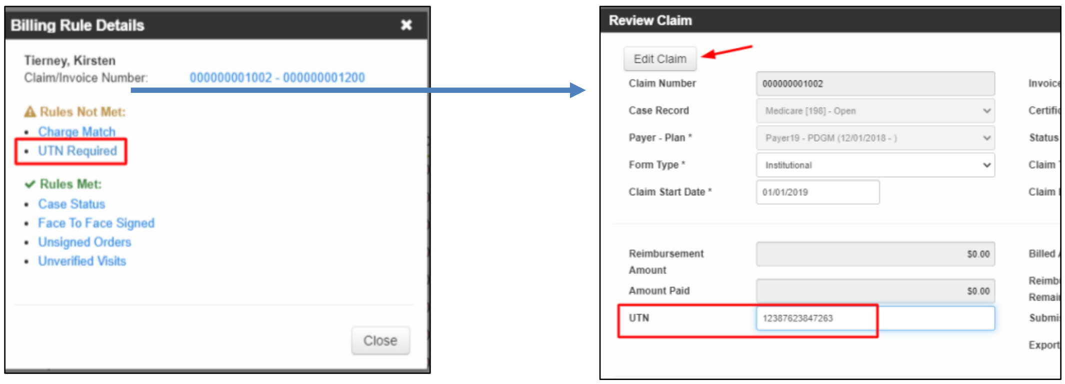
Follow your agency's procedure for uploading the RCD document zip file to the MAC portal.

When you receive the RCD decision from MAC, you must enter the UTN number into the patient's final claim BEFORE submitting it to CMS. Claims submitted to CMS without a UTN number risk a 25% reduction in reimbursement. The Home Health Care solution allows you to set a configuration rule in your payer/plan set up to recommend entry of a UTN number before submitting a claim. See Add the UTN Required Clinical Configuration Rule. When you set up this rule, UTN Required appears as a billing rule in the billing queue.

Entering UTN Number from Billing Queue (only if UTN Required Clinical Configuration rule is set)

1. On the **Billing Queue**, click on the **Claim State** for the bill to view Billing Rule Details.

2. On the Billing Rule Details dialog, click **UTN Required**, then click **Edit Claim** and enter the **UTN** number.

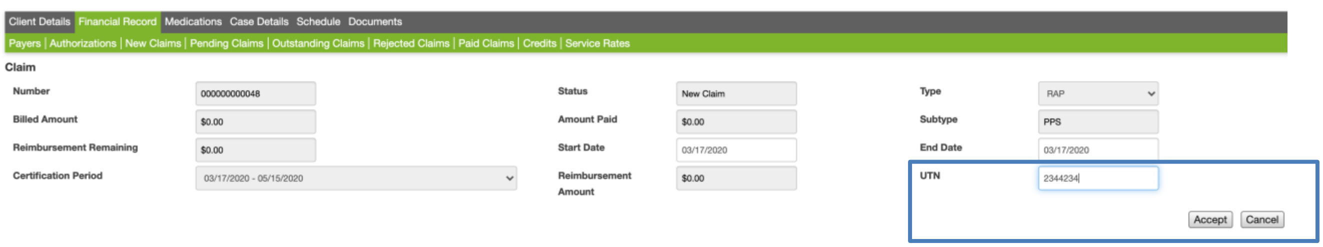


Entering UTN Number on Claim

1. Navigate to the patient's chart and select **Financial > New Claims**.

2. Click **Claim** and select **Edit Claim Information**.

3. Enter the **UTN** number and click **Accept**.



4. Continue with your agency's claim submission process.

   Tip: If your agency uses E-Solutions, you can receive the UTN number from E-Solutions rather than MAC.

Option: Add Document Types

Some agencies may choose to create document types for RCD documents. For example, you could define a different document type for each evaluation.

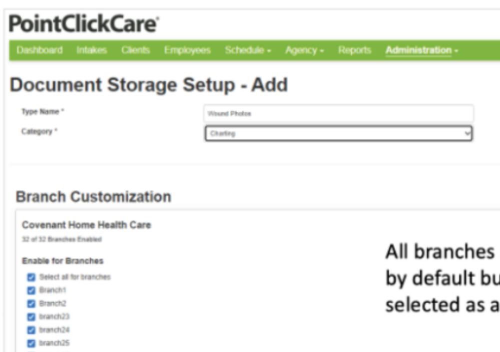
Creating New Document Types

1. With Admin user privileges, go to **Administration > Document Setup**.

2. On the Document Type tab, select **Add New Type**.

3. Create the new document type and click **Accept**. Once saved, the new type will appear in the Document Types list.

- A unique type name is required (error will be displayed if an exact match is found)
- A corresponding Category must be selected



All branches are selected by default but can be de-selected as appropriate

Filtering Patient Documents for a Document Type

1. Navigate to the patient's record and select the **Documents** tab.

2. Click the **Document Type** field and select the RCD related document types. (Multiple selections are allowed.)

3. Select the documents that you want to include in the download file.

4. Click **Download**. Bulk downloaded documents are available in a zip file that you can open or send via a secure channel. You can download up to 25 documents at a time.

5. Follow your agency's procedures for uploading document zip files to MAC and entering the UTN numbers from the MAC decision into the final claim.