Conduent
Government Healthcare Solutions
New Mexico Medicaid Project

Self-Direction Data Entry Procedure Manual

August 25, 2017
Version #1.1

Document Version: 1.0 (November 2016).

1. Revision History:

(The revision history is used to track changes and updates made to procedures and when they occurred. This must be completed every time an update or revision to the document is made)

Version	Date of Change	Description of Change	Author	Reviewed and Approved by and Date
1.0	8/25/17	Convert to Conduent template	D. Rickerd	
1.1	9/3/18	Data Entry will identify obvious errors to RTP	D. Rickerd	

2. Contents:

3. Introduction:

Performs the activities involved with processing Self-Direction waiver program Data Entry documentation (Timesheets, Mileage, Payment Request Forms) for Mi Via and Centennial Care vendors and employees.

Service Level Agreements (SLAs):

All documents received in good order by midnight Saturday each week must be processed by noon Wednesday of the following week to meet payroll according to the payroll schedule.

Payment Request Forms (PRFs) are processed every week.

Timesheets and Mileage are processed every other week according to the payroll schedule.

4. Staffing:

Job Description: Data Entry Specialist

- Data entry of material from source documents to a computer database.
- Transcribes routine pre-coded and identifiable alphanumeric data from source document and/or phone call into an automated system.
- Ensures accuracy and completeness of data.
- Performs clerical tasks in the data entry function.
- Receives and distributes incoming mail and materials.
- All other duties as assigned.
- Must have excellent oral and written communication skills and demonstrated analytical skills

5. Departmental Duties:

- Data entry of material from source documents to a computer database.
- Transcribes routine pre-coded and identifiable alphanumeric data from source document and/or phone call into an automated system.
- Receives and distributes incoming mail and materials.

Quality Assurance:

10% of Timesheets, Mileage, and Payment Request Forms (PRF) are reviewed by QA for Accuracy.

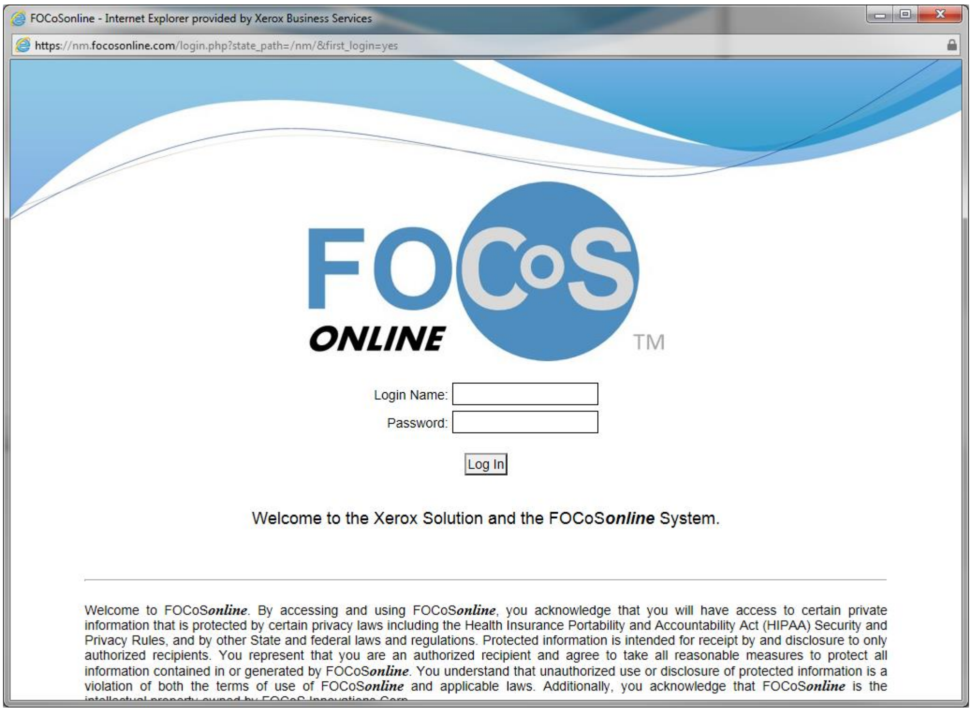
6. Tools:

FOCoS*online*

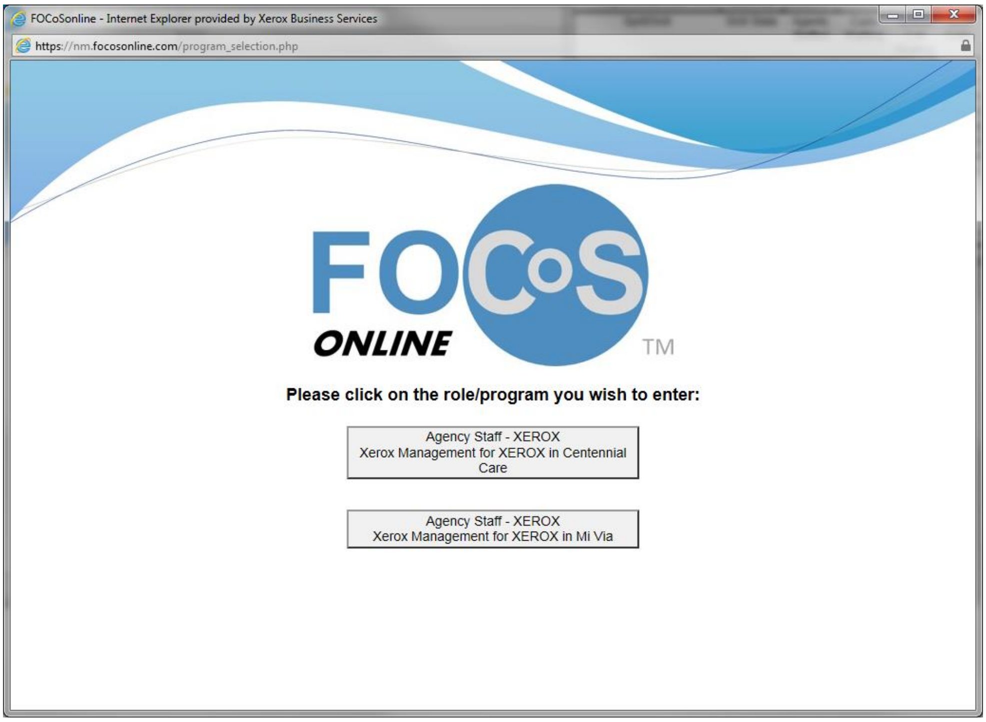
https://nm.focosonline.com/nm/

Click “Launch FOCoS***online***” button:

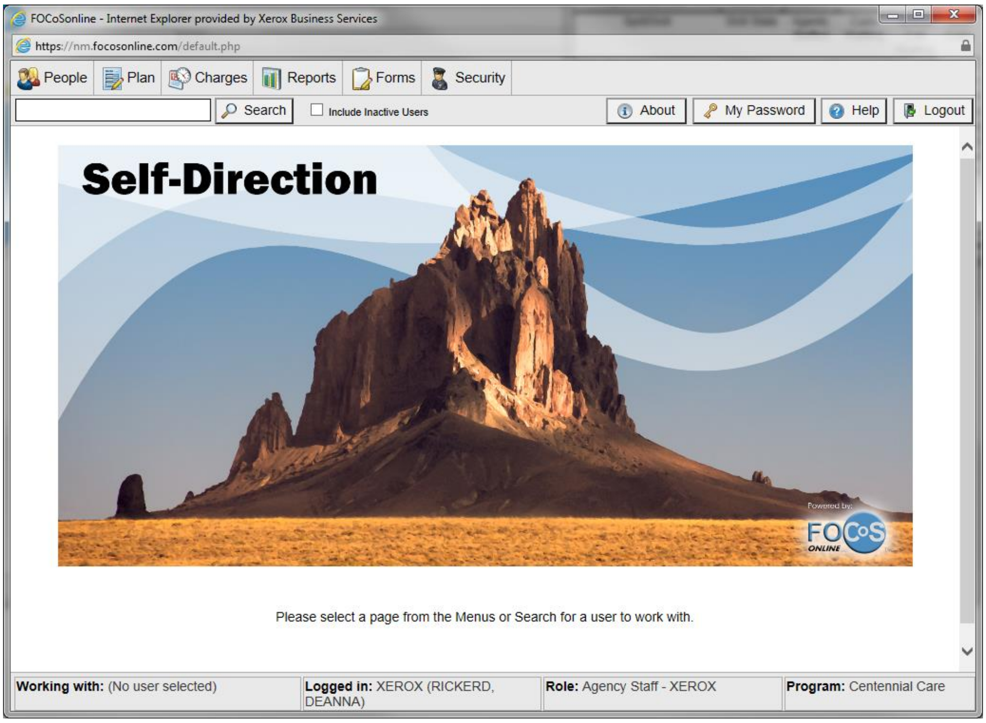
Enter your Login Name and Password:



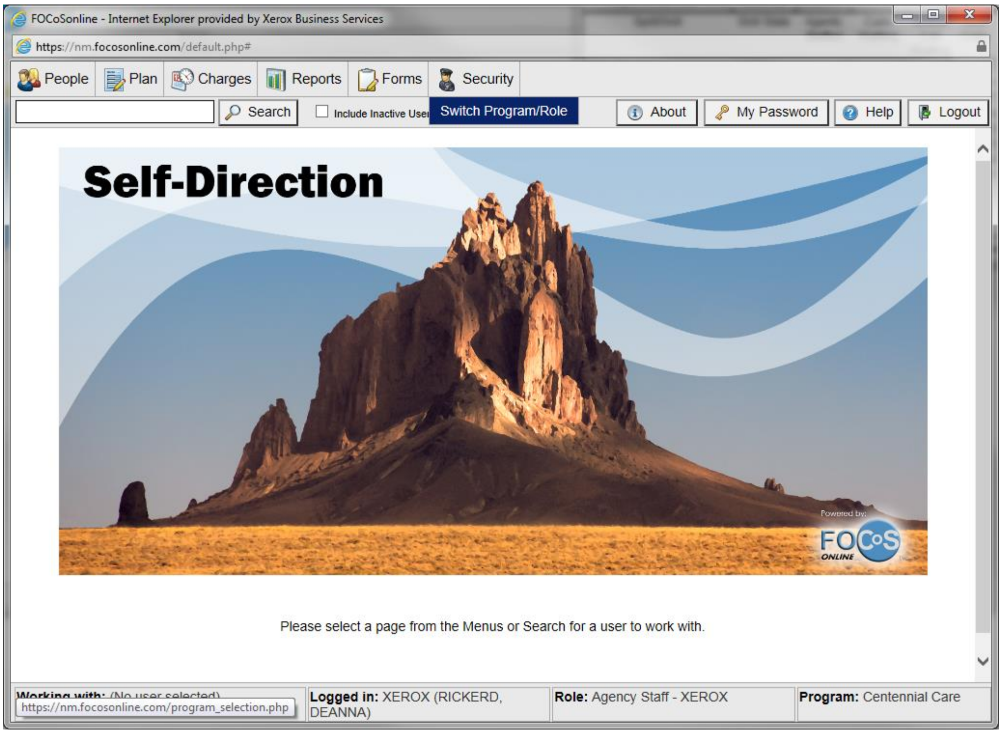
Click on the role/program you wish to enter:



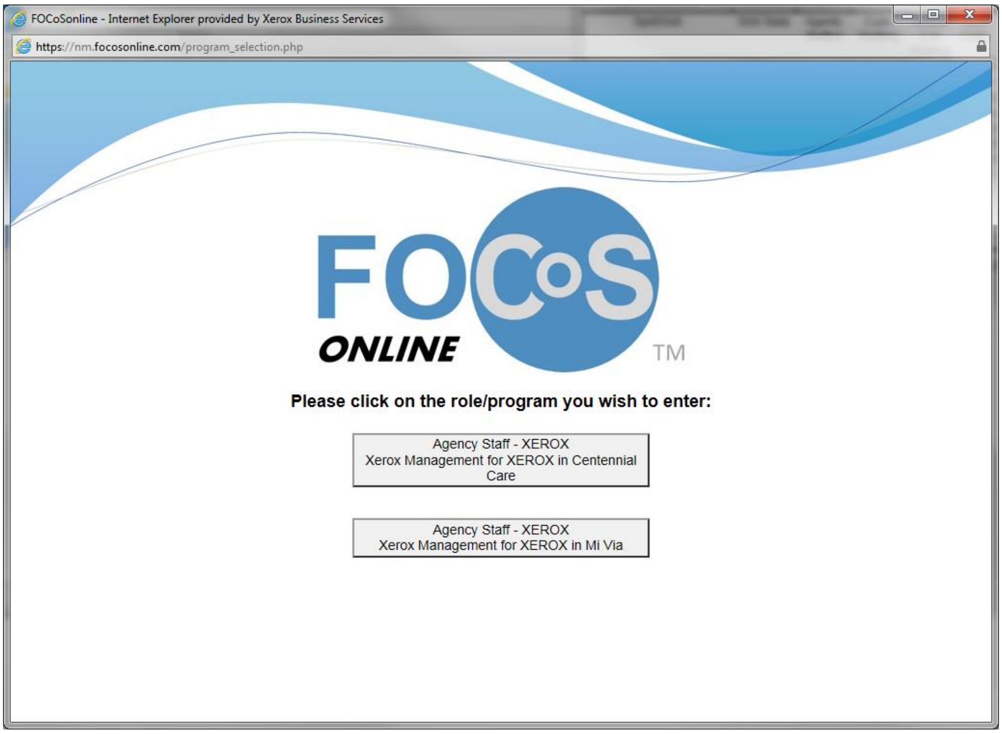
Centennial Care:



Click the “Security” button, then “Switch Program/Role” to switch to Mi Via:



Click the “Mi Via” Button:



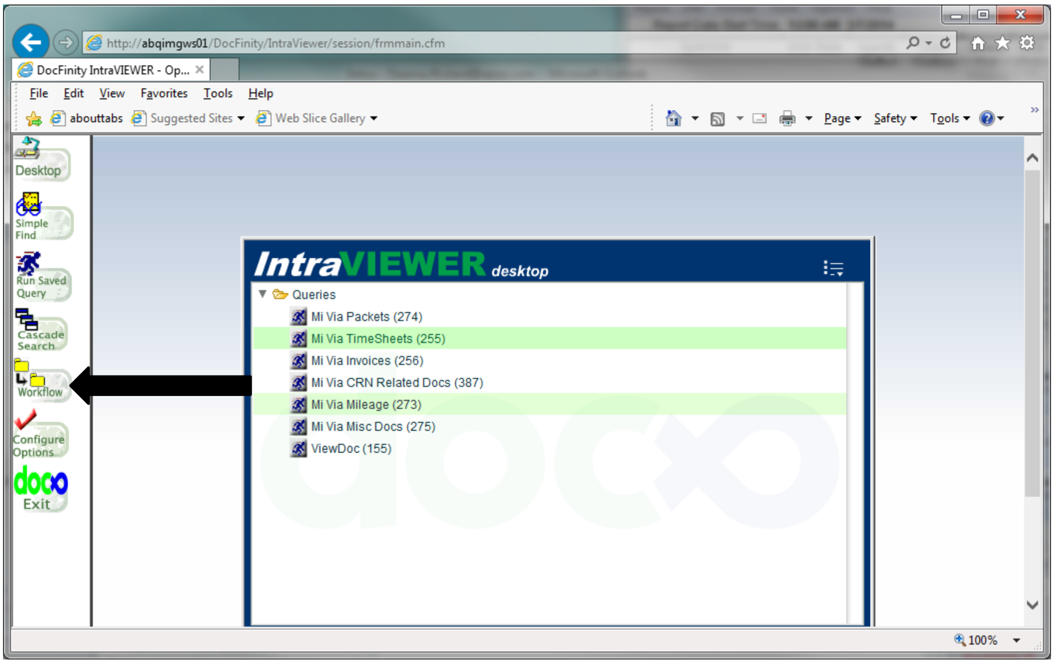
Mi Via:

DocFinity Intraviewer

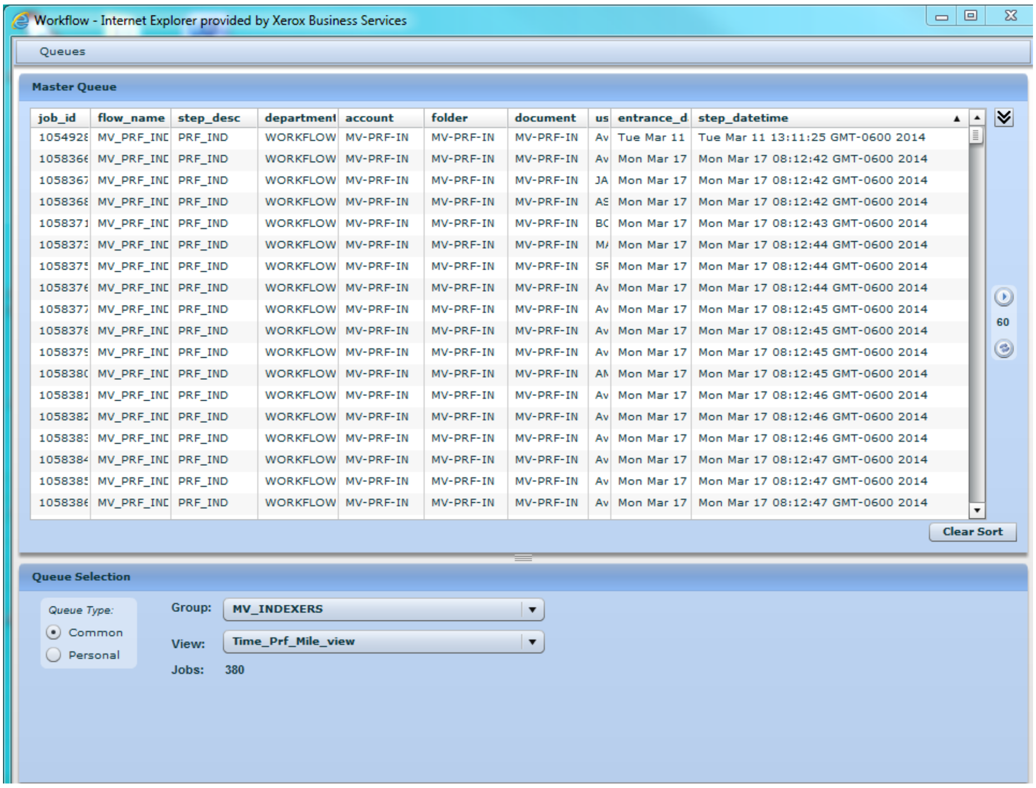
http://abqimgws01/DocFinity/IntraViewer/session/frmmain.cfm

Enter your User ID and password:

Click the “Workflow” button on the left:

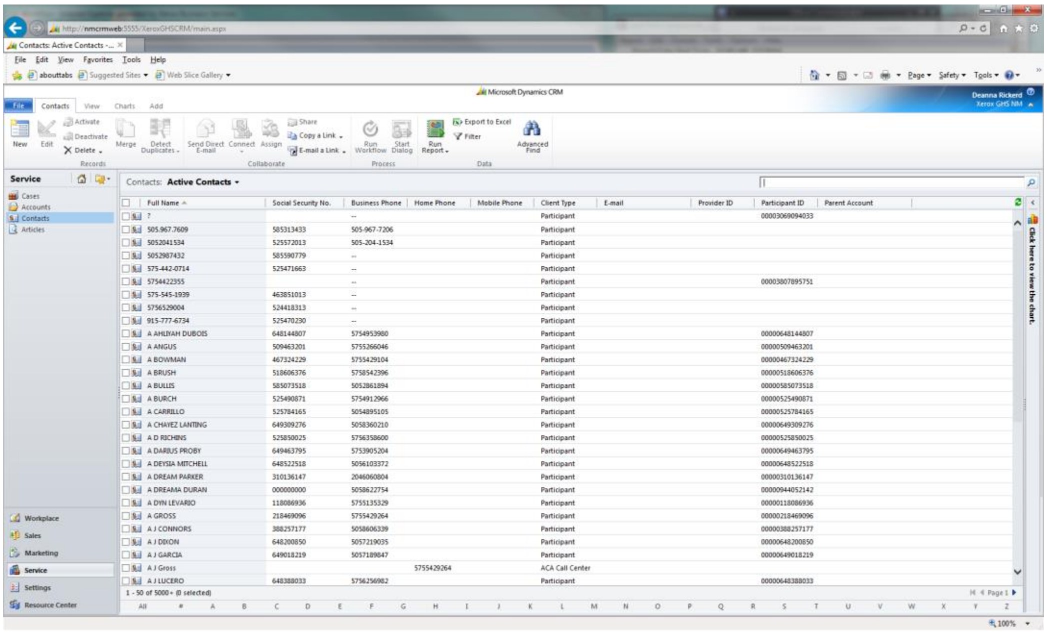


Workflow:



Microsoft Dynamics CRM

http://nmcrmweb:5555/XeroxGHSCRM/main.aspx



7. Procedures:

Receiving & Logging the Mail

The Mailroom prepping, sorting and scanning processes hold the key to getting the various types of documents for the Self-Direction program into the FOCoS***online*** system. These procedures are critical. If the documents are not sorted correctly, rejected documents, which require special handling and re-processing, are the end result.

Mail is delivered to and picked up twice daily from the Mi Via/Self-Direction Department, once at 8:00 am and again at 2:45 pm. On Mondays and Tuesdays the Mailroom has been instructed to deliver any Mi Via/Self-Direction mail they receive throughout the day, not just at 8:00 and 2:45.

Document Type	Identifier/Description	Handling
Timesheet	Single Timesheet without attachments	• Separate Timesheets into a bin for single documents
Payment Request Form (PRF)	Form requesting payment with invoice attachment	• Look at the **Name(s)** on the documents to determine which correspondence is **associated with** which **PRF** • Process **each** Inbound Correspondence with **each** PRF with the **same Name** as a **Multi**. • Insert patch sheet between each Multi PRF.
Invoices	Receipts, Mileage Invoice,	• Invoices should be attached to PRFs.
Inbound Correspondence	General letter regarding any subject	• Separate Inbound Correspondence into a bin for single documents

Facsimile Documents

Faxed documents are systematically converted into an image. There is no paper handling by the Data Entry staff via the fax server.

The individual faxes are sorted using the Fax Form ID software. From here they are placed into the normal workflow merging at the Batch Build process.

Splitting Documents

Description/Purpose

Mi Via/Self-Direction receives most of the documents through Right Fax. Documents are split using Abledoc splitter and placing them into Workflow.

Software Access Required

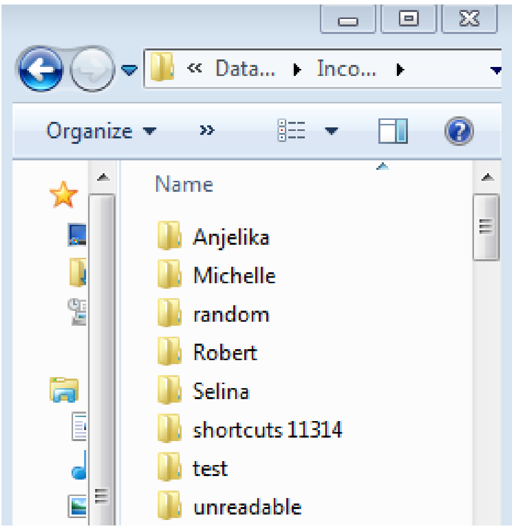
- Abledoc splitter, I: drive
- Microsoft Office Document Imaging

Steps

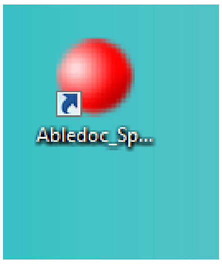
Go to start button then go to the I drive Org _unit path below

\\abq01\org_unit\Mi_Via\Data_Processing\Incoming_Documents

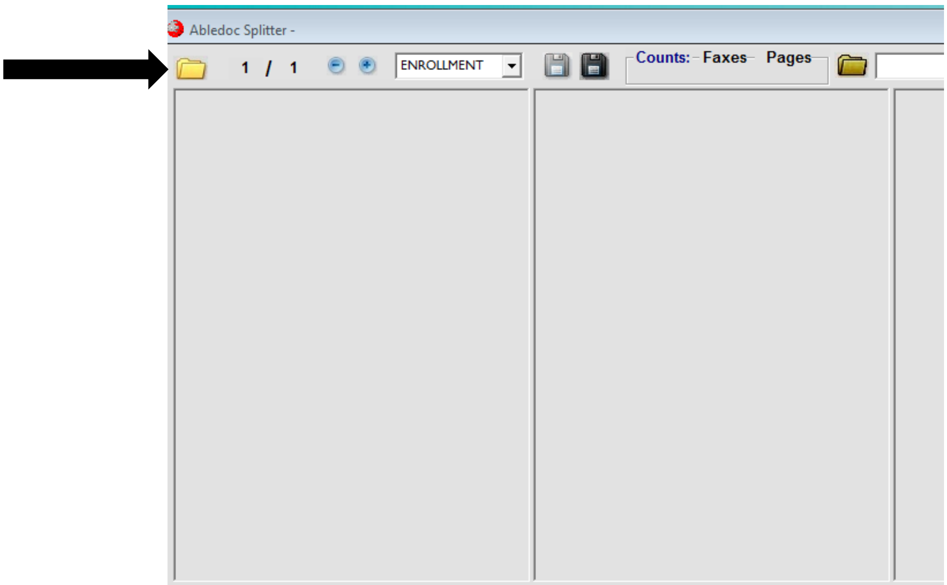
Cut the incoming files and place into the working folder with your name on it



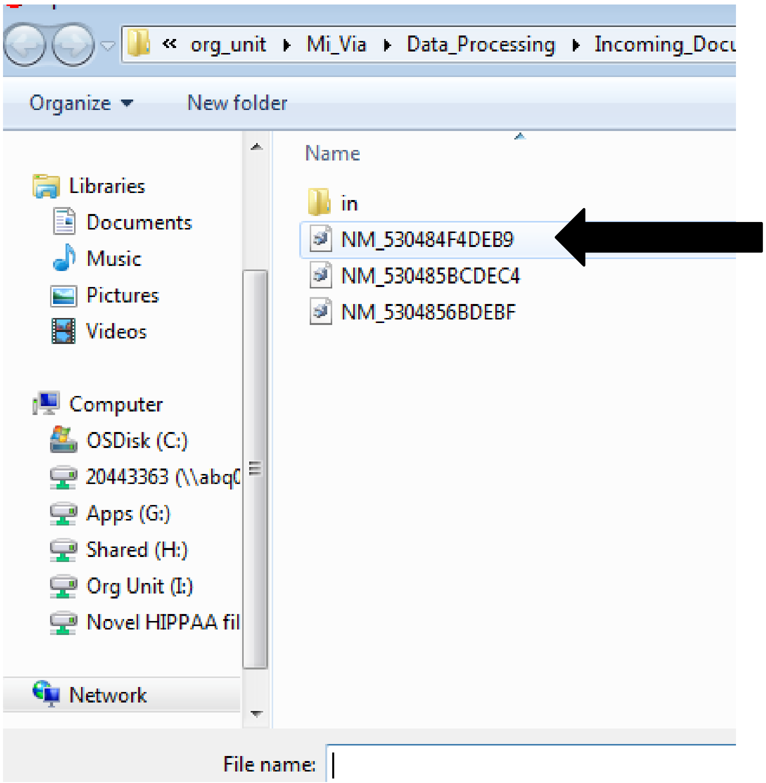
Next open Abledoc_splitter



Click on the yellow folder



A screen will pop up select the first document in the list



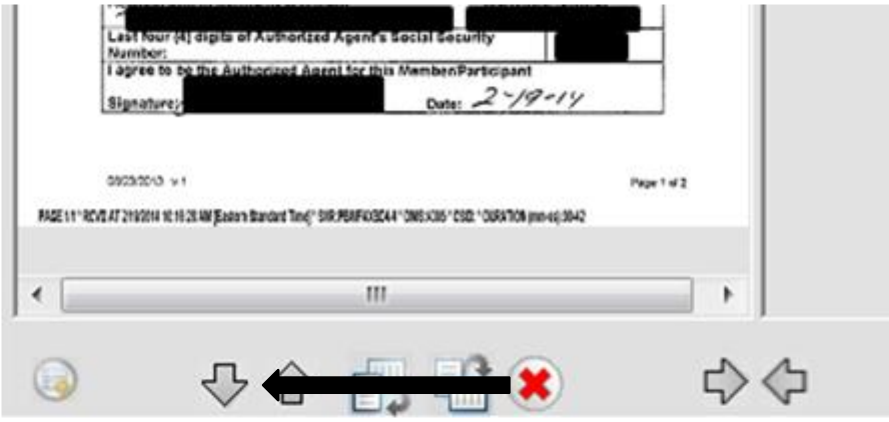
Review the document(s):

Determine what file your document(s) will need to go to

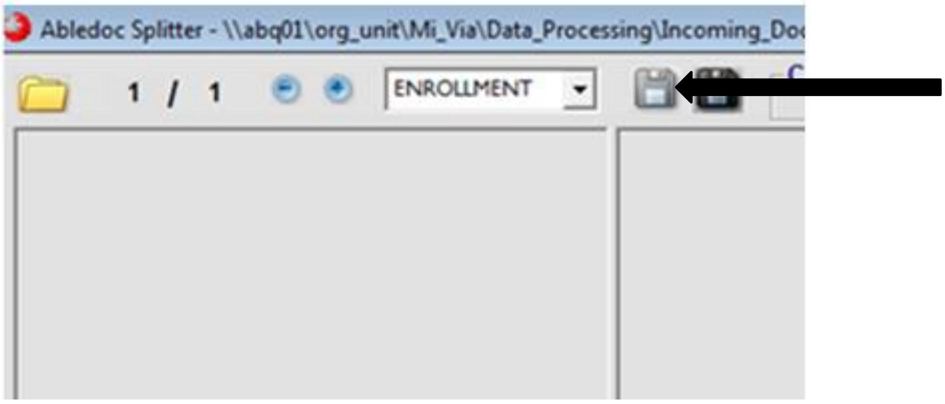
- There are six options on the drop down:
    - ENROLLMENT, PRF, TIME, UNKNOWN AND UNKNOWN_RANDOM
    - Any documents related to Enrollment go in the ENROLLMENT folder
    - Payment Request Forms (PRF) go in the PRF folder, the PRF will have an invoice attached
    - Timesheets go in the TIME folder and are usually only one document (sometimes may have a PRF with it and a fax cover sheet, don't split)

1) Select the black dropdown arrow to select for the file destination – example: Enrollment

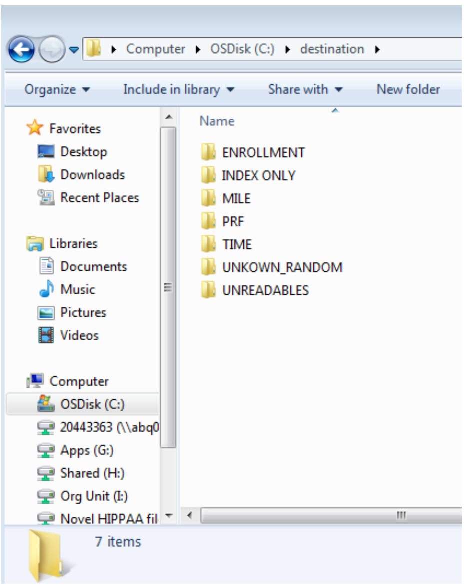
2) Select the gray down arrow at the bottom of the page



3) Select the gray save button at the top of the page



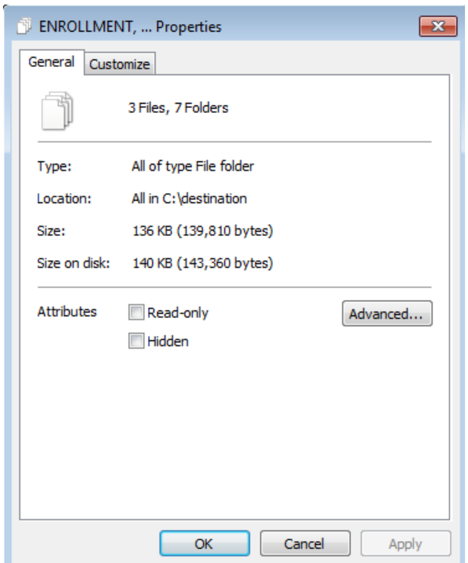
Once you are done splitting files, locate the different files in your destination folders located in the C: drive
C:\destination



Check the files you split to ensure they are in the correct corresponding folders
Example: Timesheets in the TIME folder

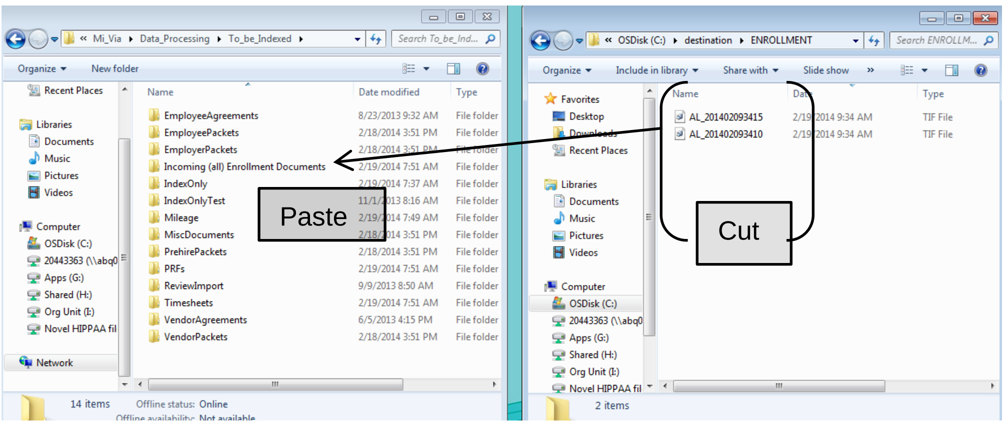
Email your supervisor with a screenshot showing the amount of documents you split

Highlight your files, right click and select “Properties”



Once you have reviewed all your folders, send the email to your supervisor of the documents you cut and pasted to the Workflow folders located in the org_unit I: drive path below:
\\abq01\org_unit\Mi_Via\Data_Processing\To_be_Indexed

4) You will need two modules open, one to place in workflow folder and the other with the destination folders
5) Cut the documents and paste in the corresponding files



Indexing

Description/Purpose

Indexing timesheet, mileage and PRF

<u>Software Access Required</u>

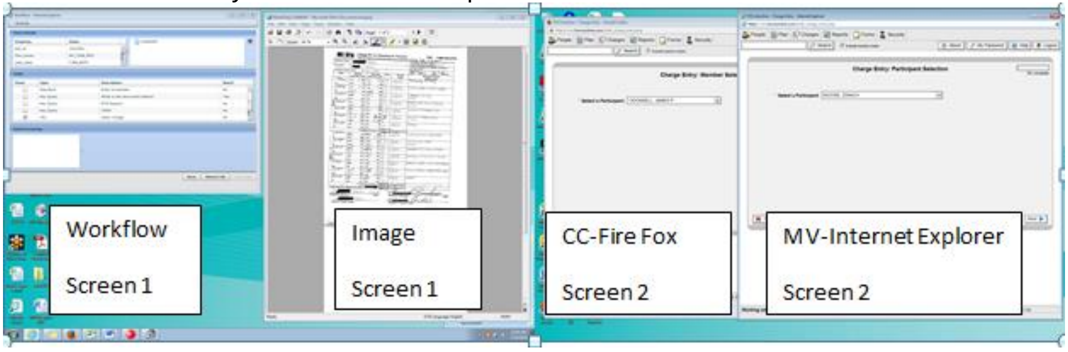
- Intraviewer (http://intraviewer/) Workflow queue
- FOCoS***online*** (https://nm.focosonline.com/nm/)
- Spreadsheet list (I:\Mi_Via\Data_Processing\2_To_be_Keyed) xxxx-xx-xx (date) Employee and Vendor spreadsheet

Set up

You may set up your 2 monitors as shown in the example below

Screen 1: Your left screen will have the workflow queue and beside it will be your Microsoft Office imaging

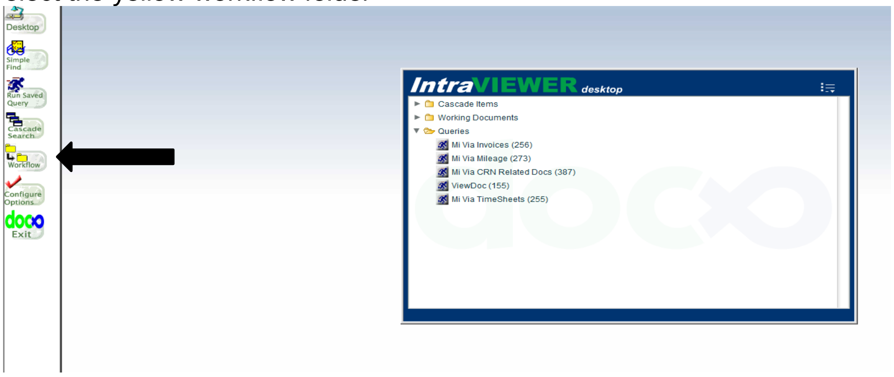
Screen 2: Your right screen will have Centennial Care FOCoS system in Firefox and beside it will be Mi Via FOCoS system in Internet Explorer



Steps

Intraviewer

1) Select the yellow workflow folder

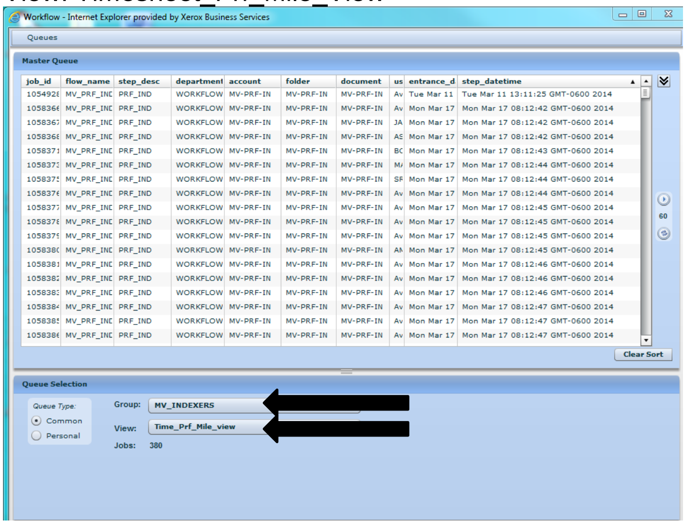


Your workflow queue should pop up

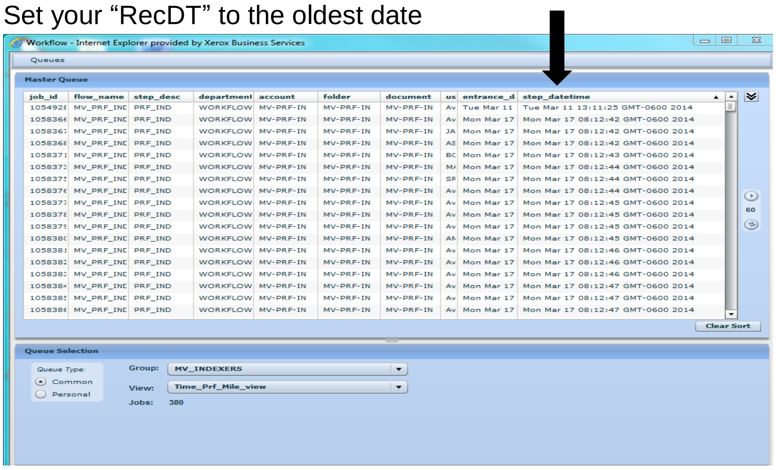
Set your queue

2) Group: MV_INDEXERS

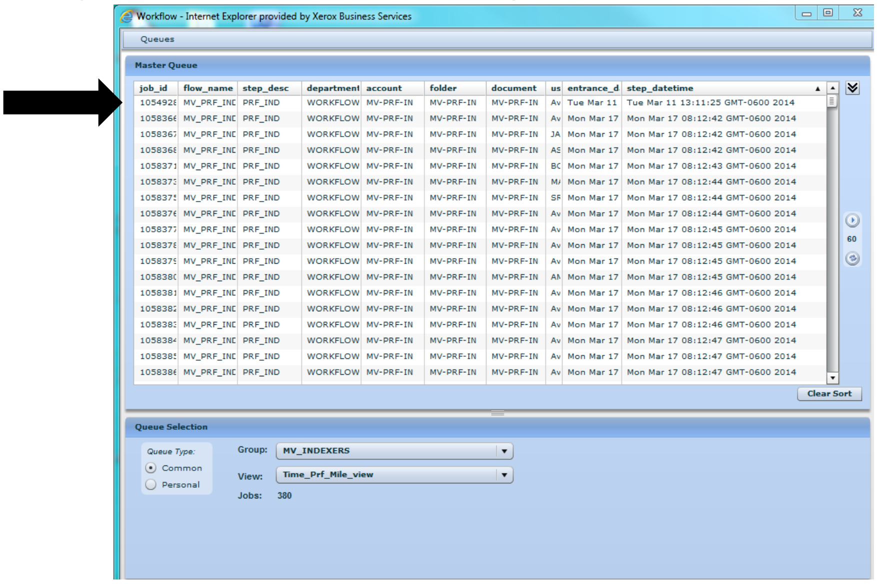
3) View: Timesheet_Prf_Mile_View



4) Set your “RecDT” to the oldest date



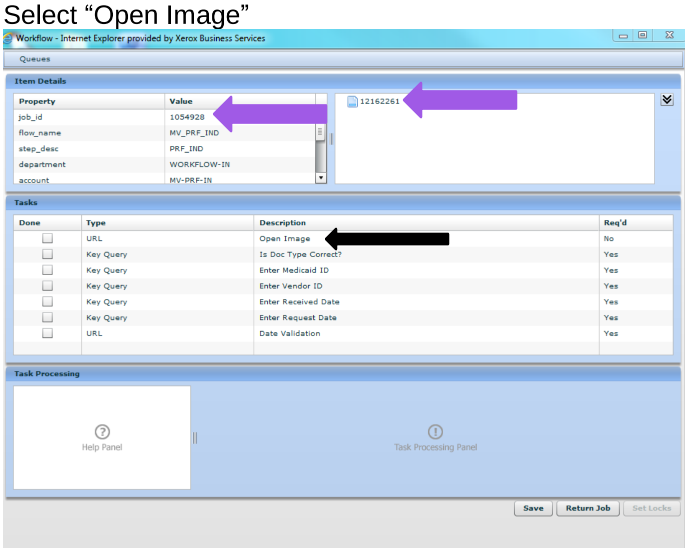
5) Select the first document at the top of the list

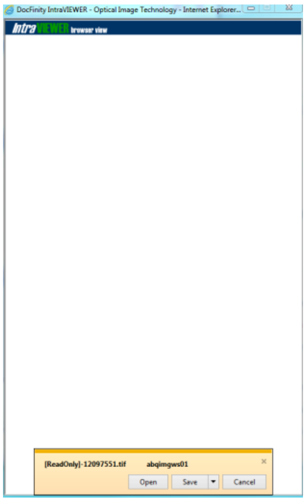


Your file queue has all the information you need to view the document

Example: Job_ID # 1054928 and Doc. # 12162261

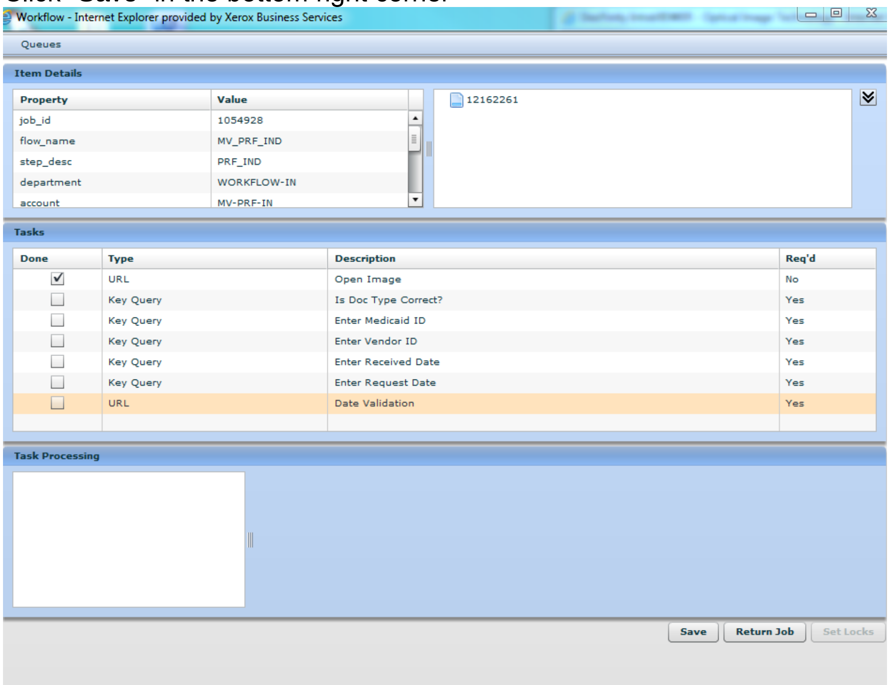
6) Select “Open Image”





The image should pop up, click open

- View your image
- Answer the questions referring to the image, click ok after every question
- Click “Save” in the bottom right corner



Entering Timesheets in FOCoS*online*

Description/Purpose

Processing a timesheet

Software Access Required

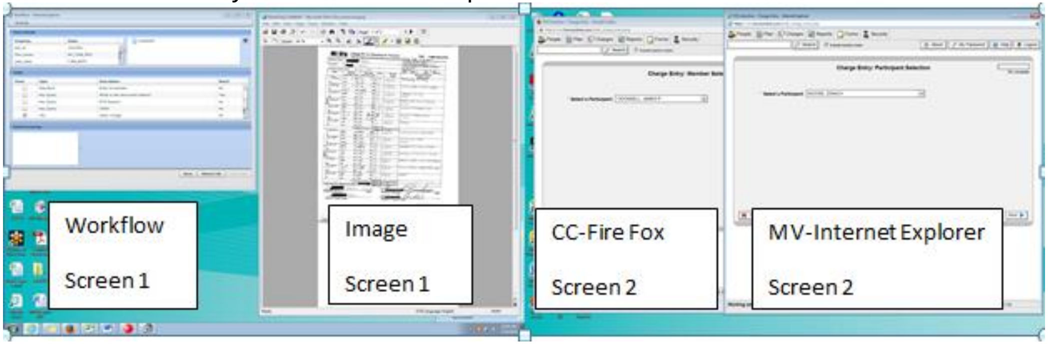
- Intraviewer (http://intraviewer/) Workflow queue
- FOCoS***online*** (https://nm.focosonline.com/nm/)
- Microsoft Office Document Imaging

Set up

You may set up your 2 monitors as shown in the example below

<u>Screen 1</u>: Your left screen will have the workflow queue and beside it will be your Microsoft Office imaging

<u>Screen 2</u>: Your right screen will have Centennial Care FOCoS system in Firefox and beside it will be Mi Via FOCoS system in Internet Explorer



Steps

<u>Intraviewer</u>

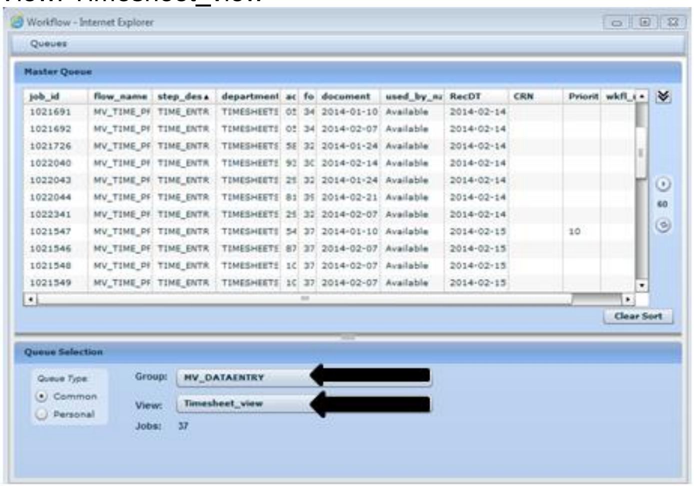
1) Select the yellow workflow folder

The workflow queue should pop up

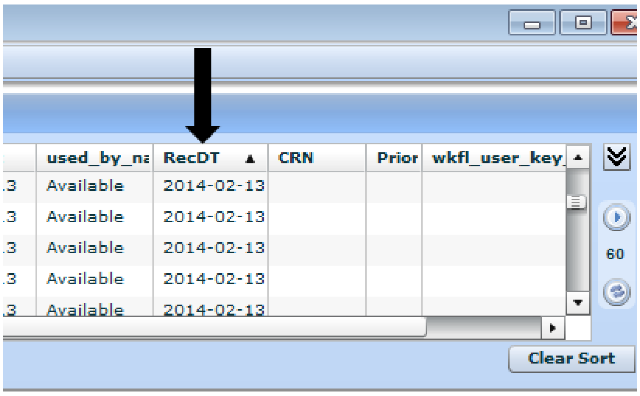
Set your queue

2) Group: MV_DataEntry

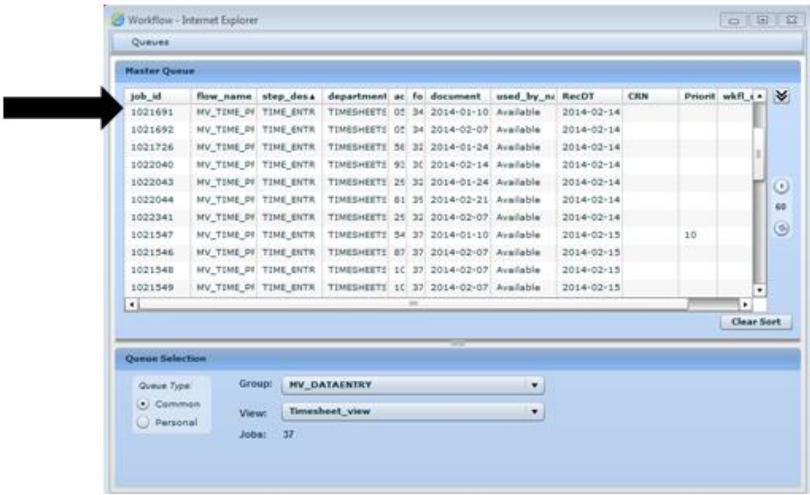
3) View: Timesheet_view



4) Set your "RecDT" to the oldest date

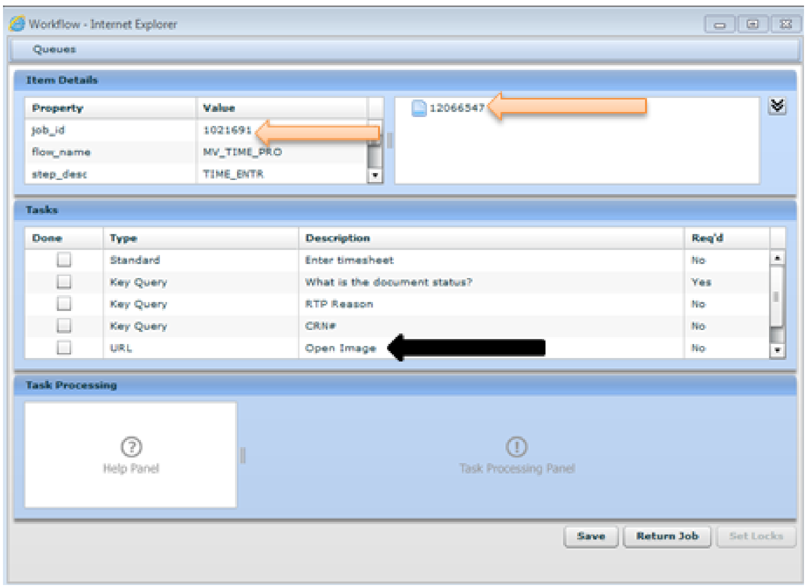


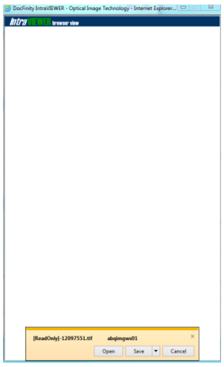
5) Select the first document at the top of the list



Your file queue has all the information you need to view the Timesheet Job_ID # 1021691 and Doc. # 12066547

6) Select "Open Image"





The image should pop up
Click “Open”

7) Check for signatures and signature dates

8) Make sure everything is filled out on the timesheet (Employee name, participant/member name, service dates, in/out times and service codes)

9) If something is missing and it’s a hard stop, follow “Creating an RTP” process

Any of the below situations may be processed, do not RTP:

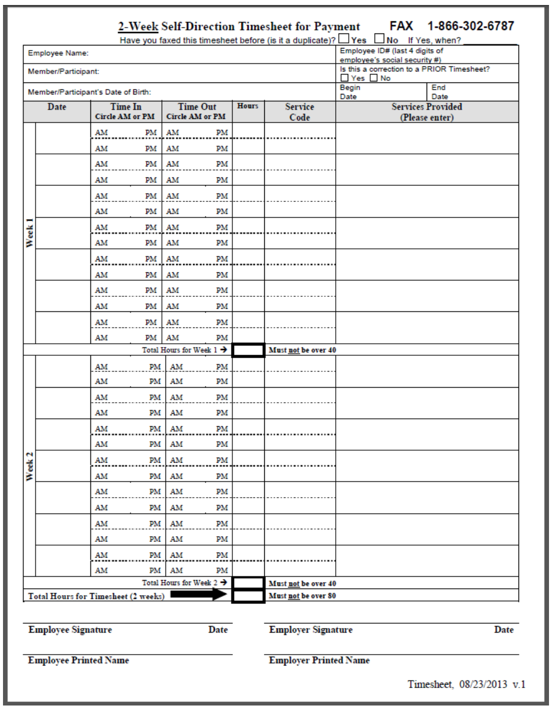
<u>*Examples*</u>

a) If the timesheet is showing 8 am to 4 = 8 hours (the pm is missing on the 4), process and add internal comments in FOCoS***online***

b) If the time is showing 8 am to blank = 8 hours (the 4pm is missing), process and add internal comments in FOCoS***online***

c) If the time is 8 to 4 = 8 hours (missing am and pm), process and add internal comments in FOCoS***online*** (use the description/services provided to decide am and pm)

d) If the time is 8 am to 9 am =1 hour for the whole timesheet (one or 2 entries missing am/pm), process and add internal comment in FOCoS***online*** (used replicate same times as all other entries)



2-Week Self-Direction Timesheet for Payment **FAX 1-866-302-6787**

Have you faxed this timesheet before (is it a duplicate)? ☐ Yes ☐ No If Yes, when? ______

Employee Name:					Employee ID# (last 4 digits of employee's social security #)	
Member/Participant:					Is this a correction to a PRIOR Timesheet? ☐ Yes ☐ No	
Member/Participant's Date of Birth:					Begin Date	End Date
	Date	Time In Circle AM or PM	Time Out Circle AM or PM	Hours	Service Code	Services Provided (Please enter)
Week 1		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
			Total Hours for Week 1 →		Must <u>not</u> be over 40	
Week 2		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
		AM PM	AM PM			
			Total Hours for Week 2 →		Must <u>not</u> be over 40	
Total Hours for Timesheet (2 weeks)					Must <u>not</u> be over 80	

Employee Signature **Date** **Employer Signature** **Date**

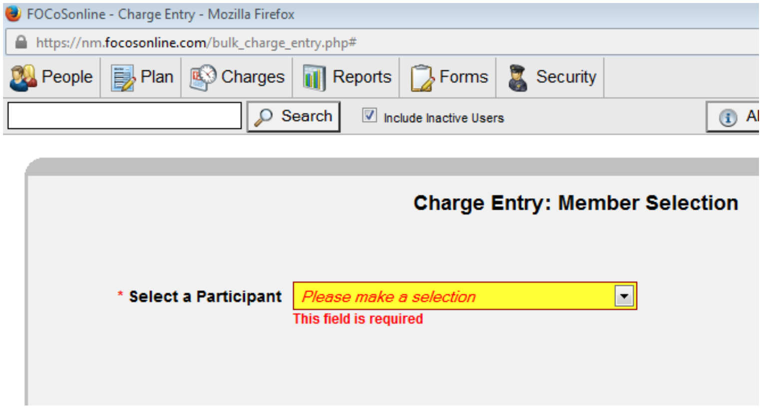
Employee Printed Name **Employer Printed Name**

Timesheet, 08/23/2013 v.1

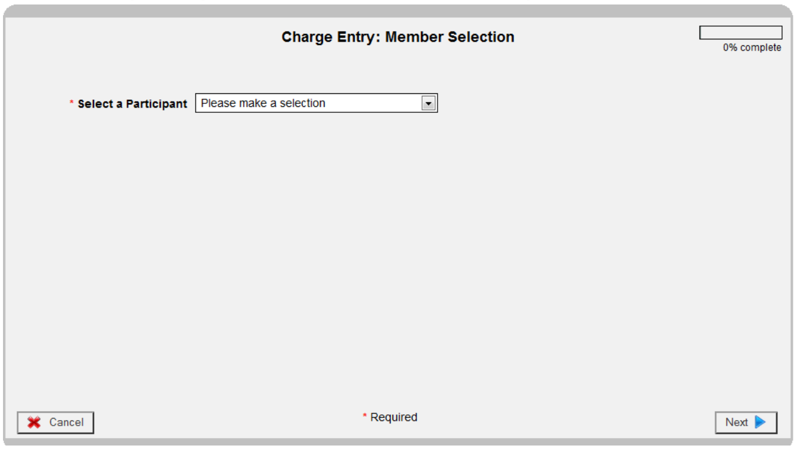
*If everything checks out you may process the timesheet in FOCoS**online***

FOCoSonline

1) Click “Charges” button, select “Bulk Charge Entry and check “Include Inactive Users” box



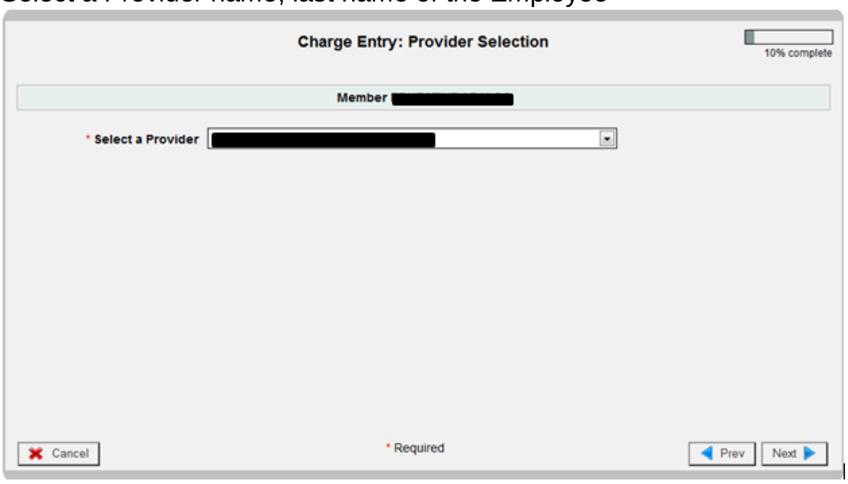
2) Select the participant/member’s name to be processed, last name first



3) Start with the Centennial Care Firefox, if not in this CC system use the Mi Via system.

4) Click “Next” in bottom right corner

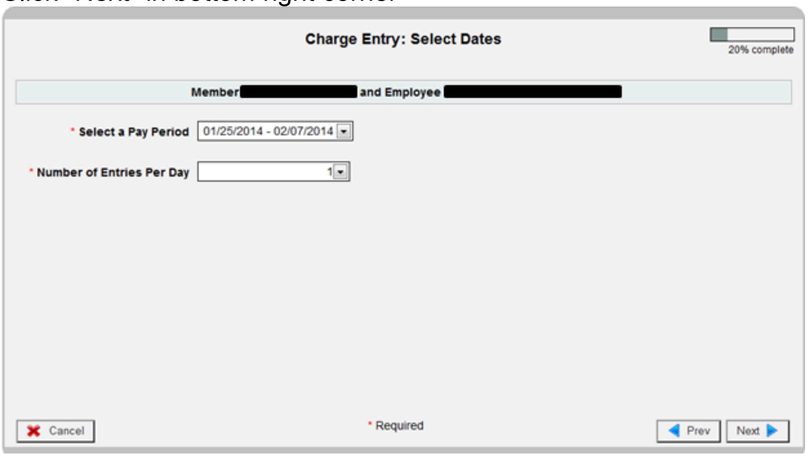
5) Select a Provider name, last name of the Employee



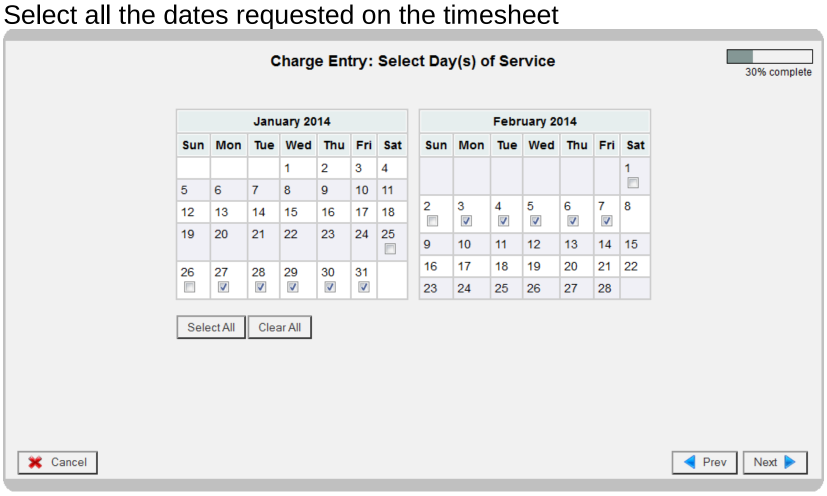
6) Click “Next” in bottom right corner

7) Select the pay period to be processed

8) Click "Next" in bottom right corner



9) Select all the dates requested on the timesheet



10) Click "Next" in bottom right corner

11) You will be in "Charge Entry: Enter Charges" screen

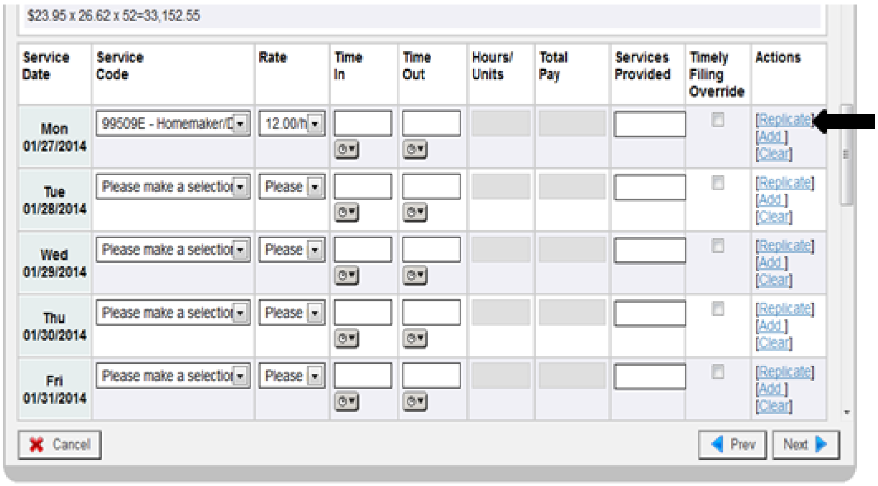
A. Verify you are working with the correct participant/member and employee compared to the timesheet you are processing. Re-check the employer of record (EOR) signature/signature dates and the employee signature/signature date. Make sure FOCoS***online*** screen matches the timesheet.

B) Use the scroll bar to the right to view the dates selected

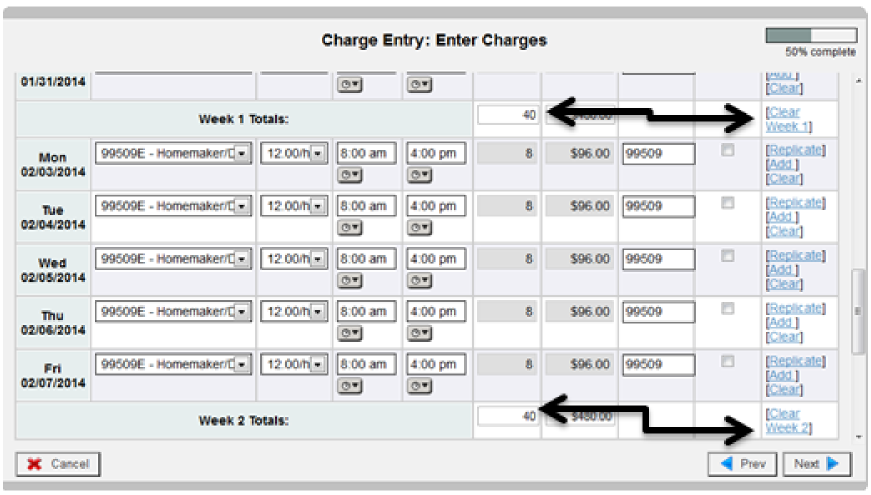
C) Enter the service code requested, rate should auto populate, time in/out use the military time, and service code.

Military Time	Standard Time
00:00	12:00 midnight
01:00	1:00am
02:00	2:00am
03:00	3:00am
04:00	4:00am
05:00	5:00am
06:00	6:00am
07:00	7:00am
08:00	8:00am
09:00	9:00am
10:00	10:00am
11:00	11:00am
12:00	12:00 midday
13:00	1:00pm
14:00	2:00pm
15:00	3:00pm
16:00	4:00pm
17:00	5:00pm
18:00	6:00pm
19:00	7:00pm
20:00	8:00pm
21:00	9:00pm
22:00	10:00pm
23:00	11:00pm
00:00	12:00 midnight

D) If all the times are the same on timesheet you may select “Replicate” for the system to auto fill the dates selected.



Check week 1 and week 2 for the total amount requested



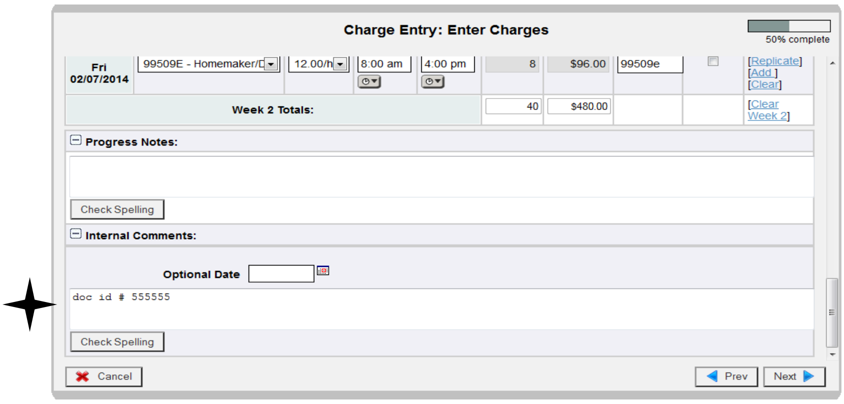
An employee may only be paid 40 hours per week. Any hours over the allotted 40 hours per week will need to be RTP'd for the remaining hours that have gone over the 40 hours.

See "Templates 2012-04-03" located in org _unit -I: drive

\\abq01\org_unit\Mi_Via\Data_Processing

Refer to "Creating an RTP" process.

12) Enter the Doc ID from Workflow in Internal Comments



Charge Entry: Enter Charges

50% complete

Fri 02/07/2014	99509E - Homemaker/D	12.00/hr	8:00 am	4:00 pm	8	$96.00	99509e		[Replicate] [Add] [Clear]
	Week 2 Totals:				40	$480.00			[Clear Week 2]

Progress Notes:

Check Spelling

Internal Comments:

Optional Date

doc id # 555555

Check Spelling

Cancel | Prev | Next

13) Click "Next" in bottom right corner

This opens the "Confirmation" screen. Compare the FOCoS***online*** entry with the timesheet.

Charge Entry: Confirmation

60% complete

Employee Name: [redacted] | Employee ID: 04936 | Begin Date: 01/25/2014 | End Date: 02/07/2014

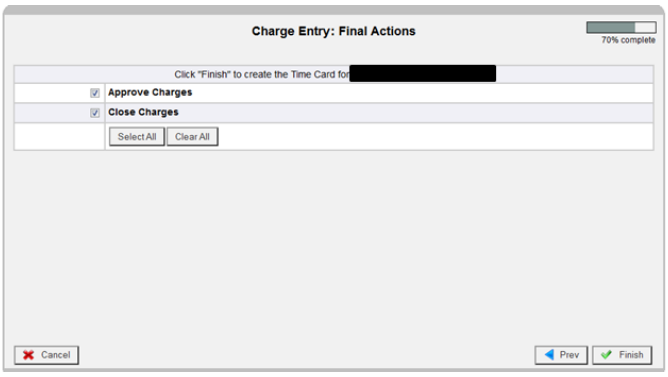
Member Name: [redacted] | Employer of Record: [redacted] | Medicaid Number: [redacted]

Service Date	Service Code	Rate	Time In	Time Out	Hours/ Units	Total Pay	Services Provided	Timely Filing Override
Mon 01/27/2014	99509E - Homemaker/Direct Support - Exception	12.00/hr	8:00 am	4:00 pm	8	$96.00	99509e	
Tue 01/28/2014	99509E - Homemaker/Direct Support - Exception	12.00/hr	8:00 am	4:00 pm	8	$96.00	99509e	
Wed 01/29/2014	99509E - Homemaker/Direct Support - Exception	12.00/hr	8:00 am	4:00 pm	8	$96.00	99509e	
Thu 01/30/2014	99509E - Homemaker/Direct Support - Exception	12.00/hr	8:00 am	4:00 pm	8	$96.00	99509e	
Fri 01/31/2014	99509E - Homemaker/Direct Support - Exception	12.00/hr	8:00 am	4:00 pm	8	$96.00	99509e	
	Week 1 Totals:				40	$480.00		
Mon 02/03/2014	99509E - Homemaker/Direct Support - Exception	12.00/hr	8:00 am	4:00 pm	8	$96.00	99509e	

Cancel | Prev | Next

14) Click "Next" in bottom right corner

15) Click "Select All" to check off both boxes



Charge Entry: Final Actions

70% complete

Click "Finish" to create the Time Card for [redacted]

Approve Charges

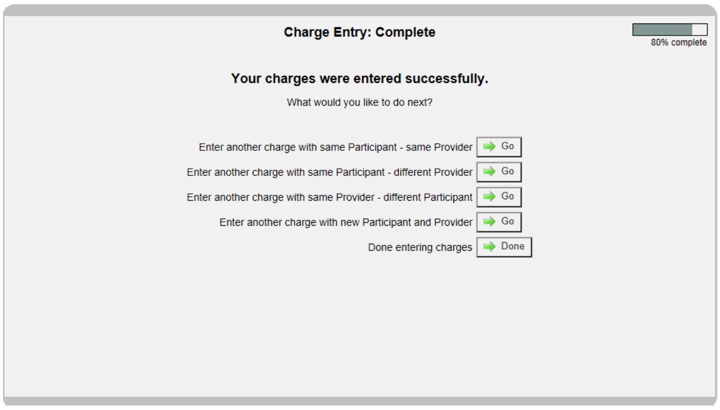
Close Charges

Select All | Clear All

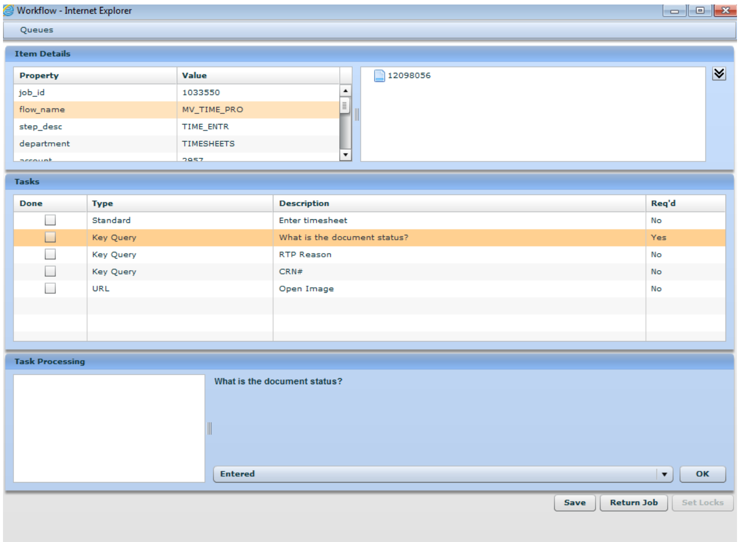
Cancel | Prev | Finish

16) Click "Finish" in bottom right corner

Timesheet has been processed sucessfully



17) Go to Workflow queue, answer the questions, and click "Save" in bottom right corner



Entering Payment Request Form (PRF) in FOCoS*online*

Description/Purpose

Processing a Payment Request form

Software Access Required

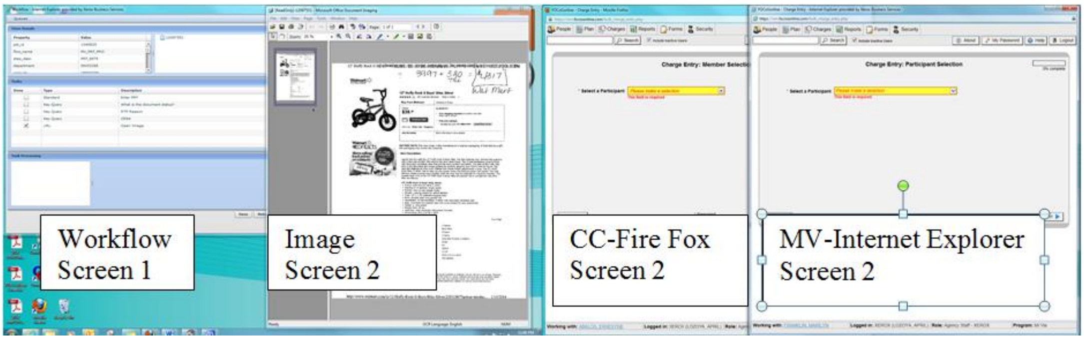
- Intraviewer (http://intraviewer/) (Workflow queue)
- FOCoS***online*** (https://nm.focosonline.com/nm/)
- Microsoft Office Document Imaging

Set up

You may set up your 2 monitors as shown in the example below

Screen 1: Your left screen will have the workflow queue and beside it will be your Microsoft Office imaging

Screen 2: Your right screen will have Centennial Care FOCoS system in Firefox and beside it will be Mi Via FOCoS system in Internet Explorer



Steps

Intraviewer

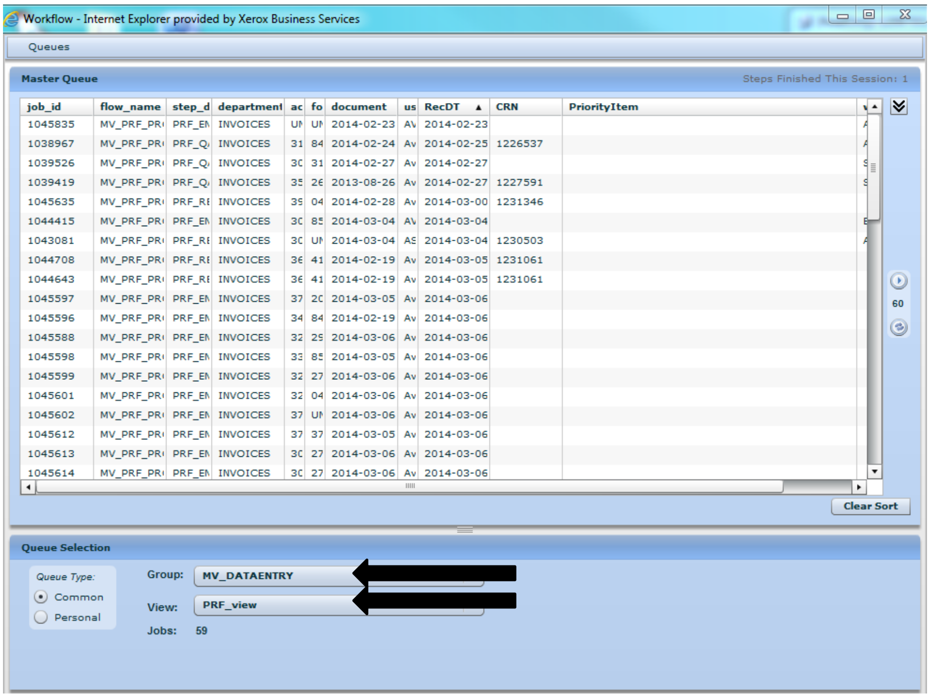
1) Select the yellow workflow folder

Your workflow queue should pop up

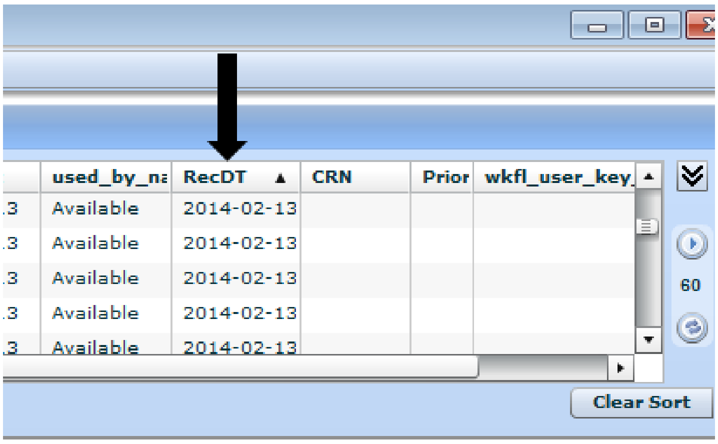
Set your queue

Group: MV_ DATAENTRY

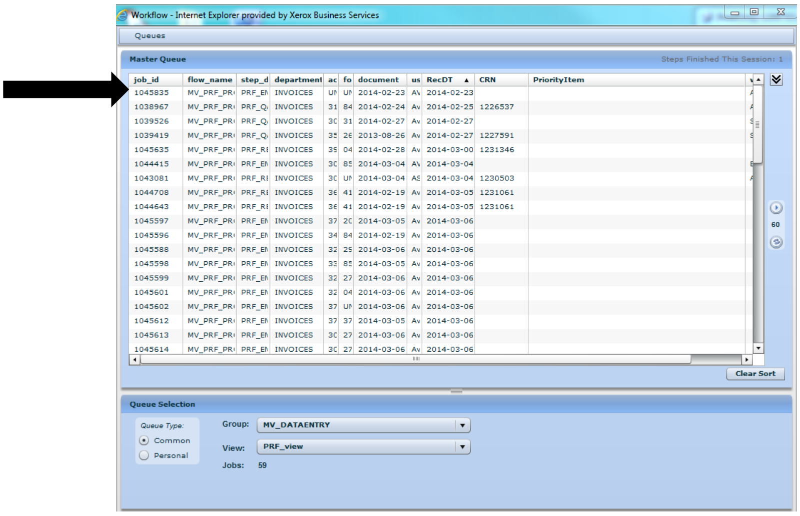
View: PRF_view



2) Set your "RecDT" to the oldest date

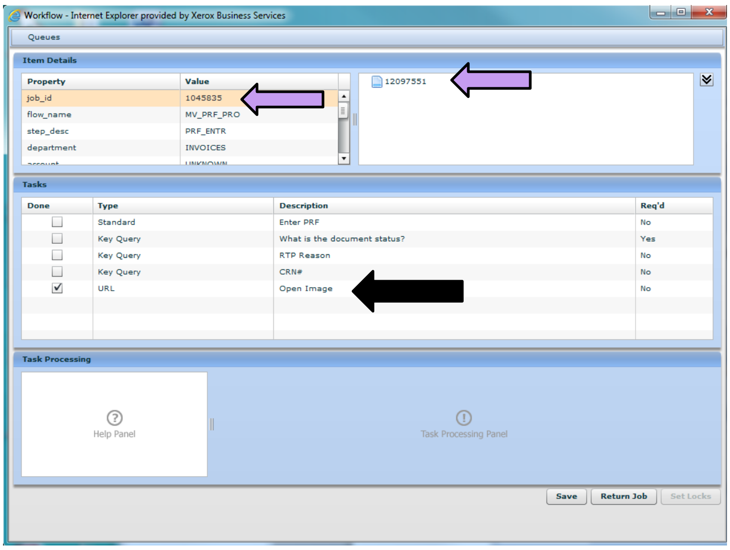


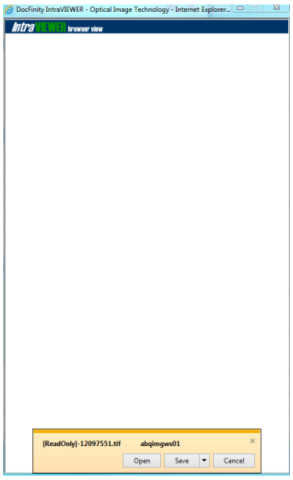
3) Select the first document at the top of the list



Your file queue has all the information you need to view the PRF Job_ID # 1045835 and Doc. # 12097551

4) Select the Open Image



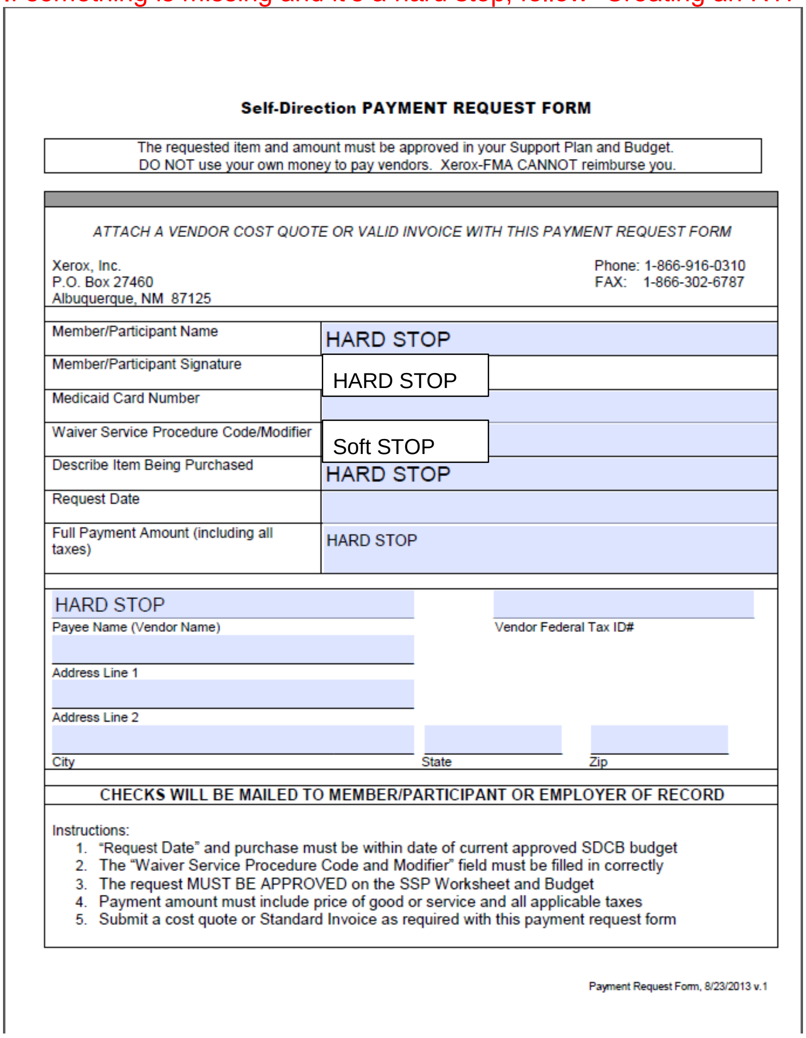


The image should pop up, click “Open”

2) Check for signatures and signature dates

3) Make sure everything is filled out on the PRF and invoice (Payee/vendor name, participant/member name, service dates, item being purchased, payment amount, and service codes)

4) If something is missing and it’s a hard stop, follow “Creating an RTP” process



Self-Direction PAYMENT REQUEST FORM

The requested item and amount must be approved in your Support Plan and Budget.
DO NOT use your own money to pay vendors. Xerox-FMA CANNOT reimburse you.

ATTACH A VENDOR COST QUOTE OR VALID INVOICE WITH THIS PAYMENT REQUEST FORM

Xerox, Inc.
P.O. Box 27460
Albuquerque, NM 87125

Phone: 1-866-916-0310
FAX: 1-866-302-6787

Member/Participant Name	HARD STOP
Member/Participant Signature	HARD STOP
Medicaid Card Number	
Waiver Service Procedure Code/Modifier	Soft STOP
Describe Item Being Purchased	HARD STOP
Request Date	
Full Payment Amount (including all taxes)	HARD STOP

HARD STOP
Payee Name (Vendor Name)

Vendor Federal Tax ID#

Address Line 1

Address Line 2

City State Zip

CHECKS WILL BE MAILED TO MEMBER/PARTICIPANT OR EMPLOYER OF RECORD

Instructions:
1. “Request Date” and purchase must be within date of current approved SDCB budget
2. The “Waiver Service Procedure Code and Modifier” field must be filled in correctly
3. The request MUST BE APPROVED on the SSP Worksheet and Budget
4. Payment amount must include price of good or service and all applicable taxes
5. Submit a cost quote or Standard Invoice as required with this payment request form

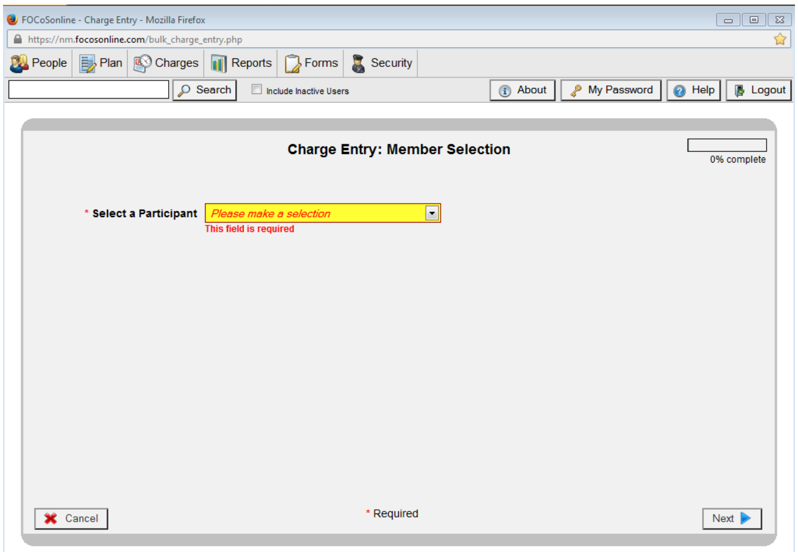
Payment Request Form, 8/23/2013 v.1

Invoices

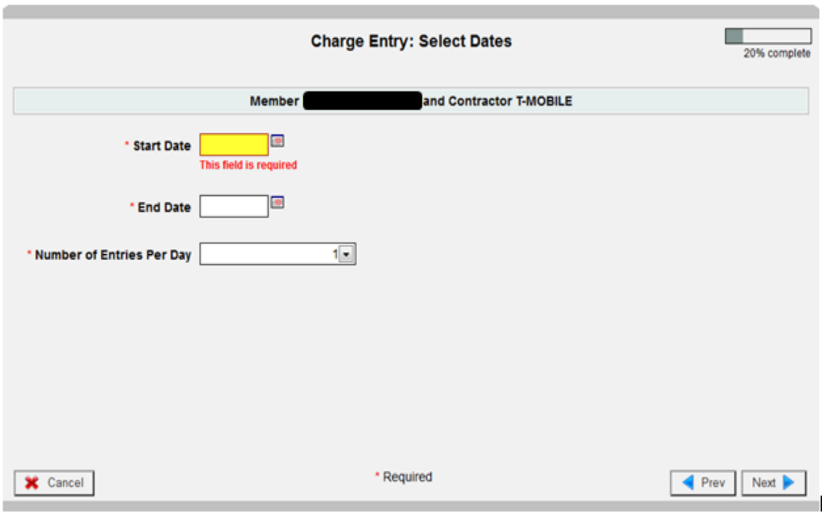
Invoices may be received two ways on a Payment Request Form (PRF) or on an Invoice for Non-Timesheet Provider Agency/Contractor

Entering an Invoice

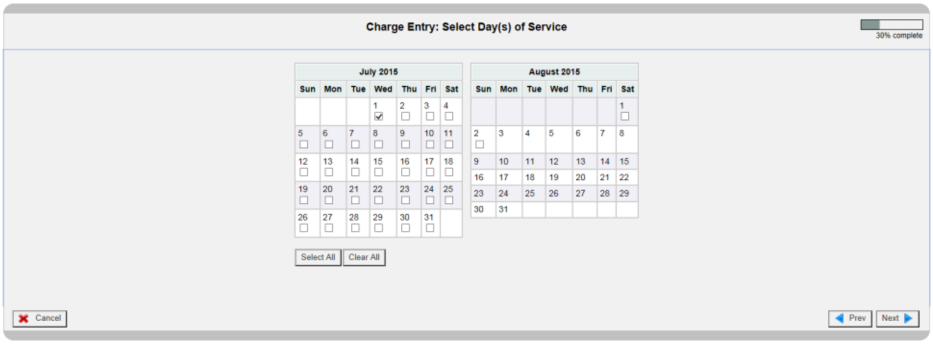
1. Click "Charges button and select "Bulk Charge Entry" you will be directed to "Charge Entry: Member Selection" screen: Member Selection (CC) /Participant Selection (MV)



2. Select the Participant/Member and click "Next" in bottom right corner
3. Select the Rendering Provider and click "Next" in bottom right corner
4. You will be directed to "Charge Entry: Select Dates" screen

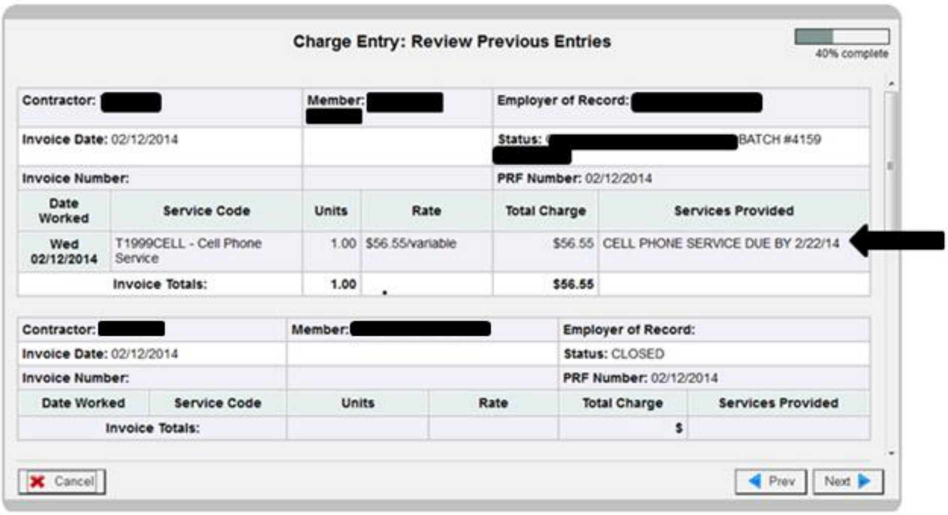


5. Enter:
   - Start Date (first date of service, if none use first date of date range, if none use bill date and if no date and this is a quote use the PRF request date, if no request date use the fax in date)
   - End Date (invoice date/if none use the PRF request date, if none use fax in date)
   - If you have more than one entry to enter for the same day, add the amount together.
   - Click "Next" in bottom right corner



6. Enter:
   - Start Date =
     - Bills – Select first service date
     - Invoices – Select all dates to be keyed
     - Quotes – Select PRF request date

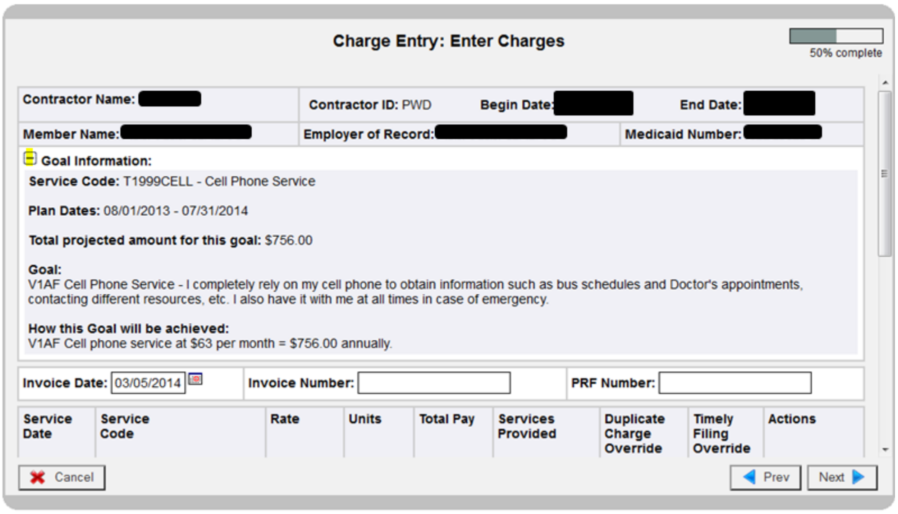
7. You will be directed to “Charge Entry: Review Previous Entries” screen
   - Iidentify if the invoice is a duplicate or a new request. Review the service date ranges and/or due dates to identify any duplicate requests.
   - If a new request, click “Next” in bottom right corner



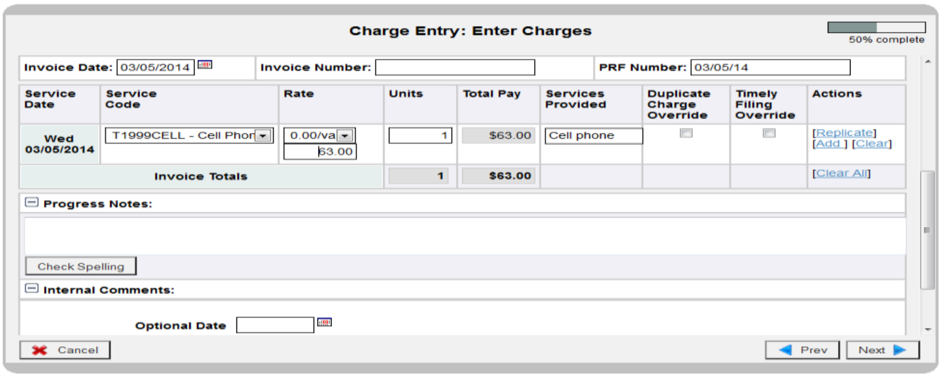
8. You will be directed to “Charge Entry: Enter Charges” screen

9. Review the Goal information while processing a request.
    - review the service code
    - the rate
    - the item/services provided

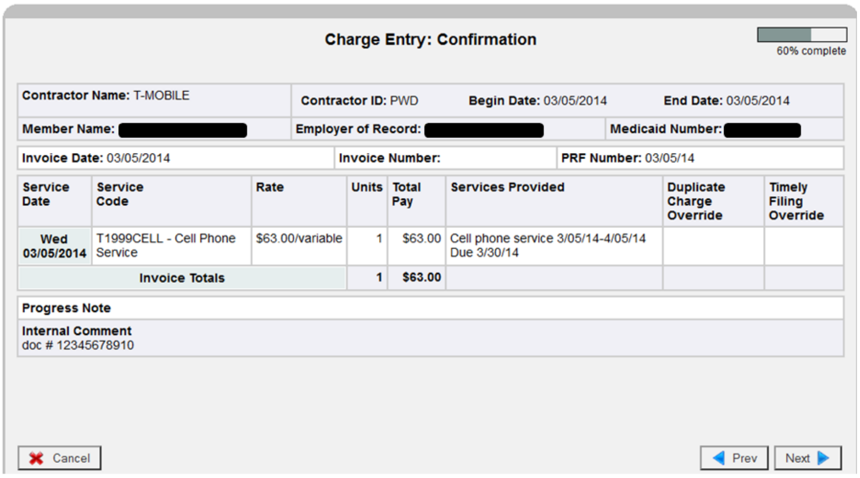
10. Enter the request dates and amount:
    - Invoice Date: prefilled from “Charge Entry: Select Dates” screen
    - Invoice Number: located on the invoice (if the invoice does not have one, leave blank)
    - PRF Number: enter “Request Date” located on the PRF (if no request date, enter the fax date).



11. Scroll down:
    - Select the Service Code: example T1999Cell-Cell Phone
    - Select the Variable (enter the requested amount on the PRF)
        - Make sure this amount is within the allotted amount (if requesting more than the allotted amount, process the allotted amount and RTP the rest. See RTP section
    - Enter the units, Example: 1
    - In “Services Provided” notate the description of the request, Example: Cell phone service 3/05/14-4/05/14 Due 3/30/14
    - Enter the Doc ID number in “Internal Comments”, click “Next” in bottom right corner



12. You will be directed to “Charge Entry: Confirmation” screen
    - Compare the entry in FOCoS***online*** to the PRF/invoice
    - If everything is correct, click “Next” in bottom right corner



Charge Entry: Confirmation

60% complete

Contractor Name: T-MOBILE | **Contractor ID:** PWD | **Begin Date:** 03/05/2014 | **End Date:** 03/05/2014

Member Name: [redacted] | **Employer of Record:** [redacted] | **Medicaid Number:** [redacted]

Invoice Date: 03/05/2014 | **Invoice Number:** | **PRF Number:** 03/05/14

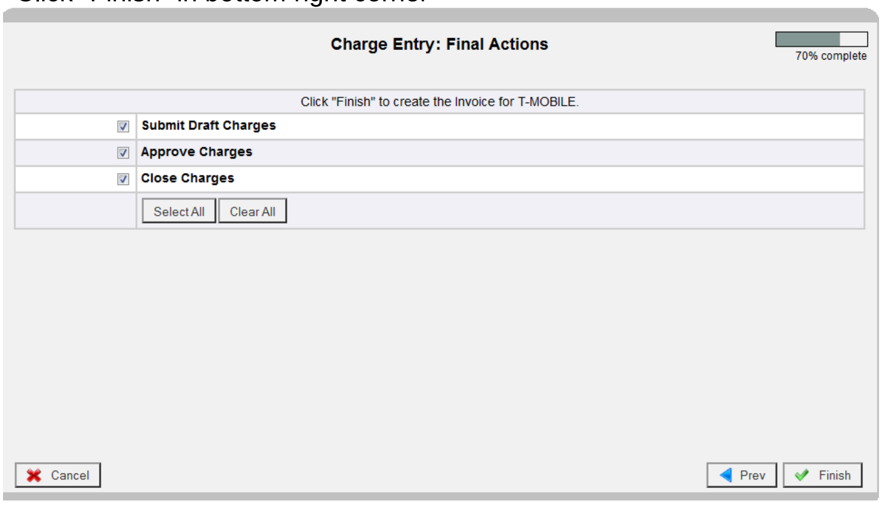
Service Date	Service Code	Rate	Units	Total Pay	Services Provided	Duplicate Charge Override	Timely Filing Override
Wed 03/05/2014	T1999CELL - Cell Phone Service	$63.00/variable	1	$63.00	Cell phone service 3/05/14-4/05/14 Due 3/30/14		
	Invoice Totals		1	$63.00			

Progress Note

Internal Comment
doc # 12345678910

Cancel Prev Next

13. You will be directed to “Charge Entry: Final Actions” screen
    - Click “Select All” to check off the boxes
    - Click “Finish” in bottom right corner



Charge Entry: Final Actions

70% complete

Click "Finish" to create the Invoice for T-MOBILE.

- [x] Submit Draft Charges
- [x] Approve Charges
- [x] Close Charges

Select All Clear All

Cancel Prev Finish

Working a PRF before entering

A. Verify signature and signature date of EOR and/or participant/member on PRF.

B. Signature and signature date of vendor/contractor on Non-Timesheet Provider Agency/Contractor form
   - Do not key if not signed

C. We may process a PRF if the request has more than one service code as long as there is a requested amount for each service code

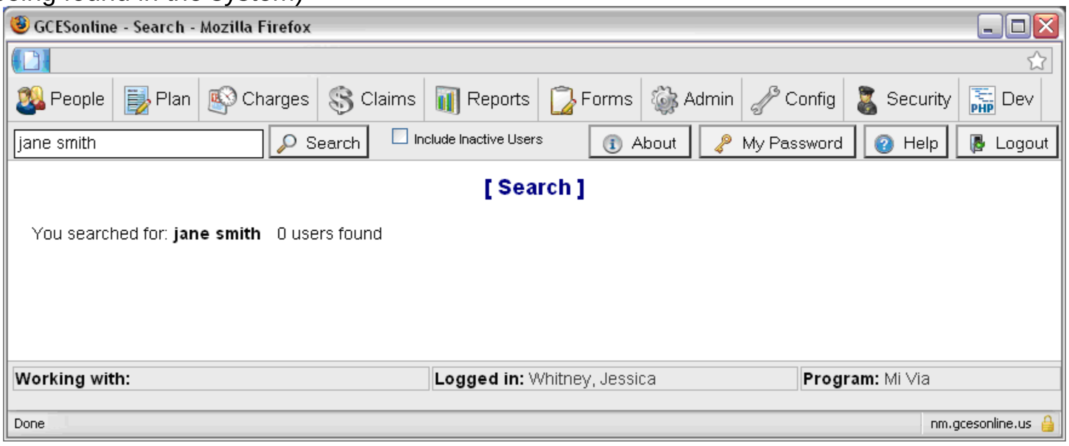
D. PRF QUOTES/ INVOICES- Taxes -If we receive any PRF with the requested amount total with taxes of an item and it doesn’t show the taxes on the invoice/quote, but it is allowed in the plan. It is ok to process, just make sure to notate in the internal comments. It is also fine if there is hand writing on the invoice indicating the taxes. Make sure the taxes are in the range of what taxes should be.

E. IF the PRF is requesting a massage and or service. If the PRF is requesting more hours / unites then allotted in plan, we may process as long as the rate is matching in the system. This will allow the participant/member/ EOR to manage their plan budget. If the participant/member/ /EOR does not manage their monthly allotted budget, the plan will be over plan budget before the year is over.

Linking an Employee with a Participant/Member

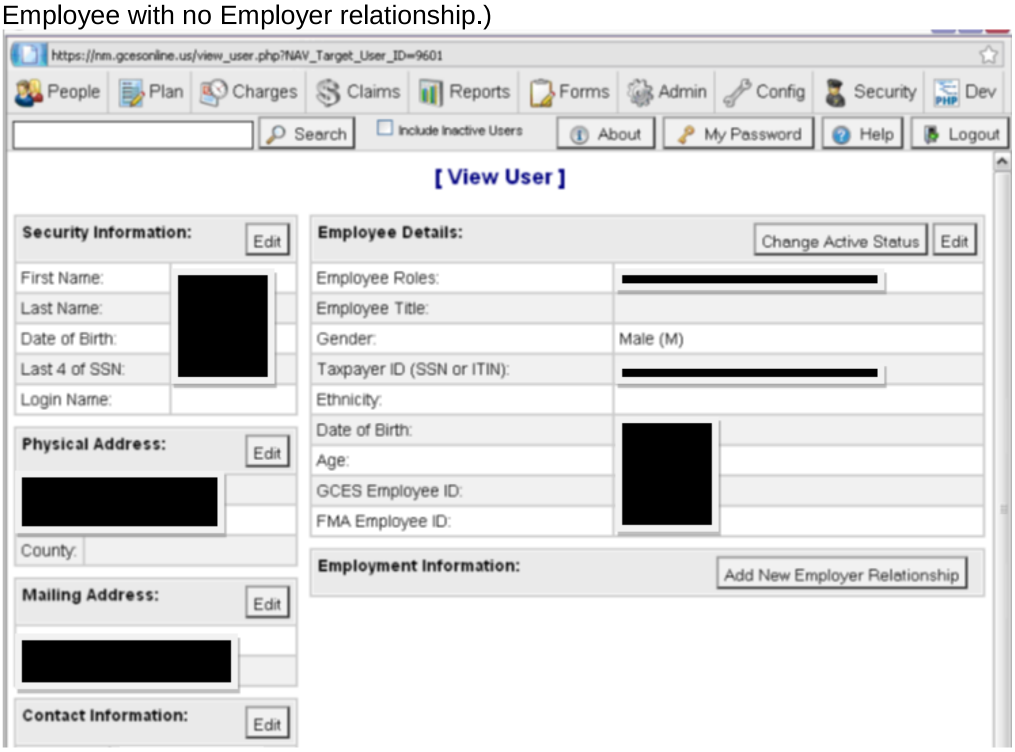
If you try to add an Employee to a Participant's/member's plan but the Employee does not display in the Provider drop-down list.

- Search for the Employee by entering their name in the search field and click "Search" button.
- If the Employee does not exist in the FOCoS***online*** system, contact Enrollment to see if they have any record of this person. (See screenshot below for an example of the Employee not being found in the system)



- If the Employee does exist in the FOCoS***online*** system, click on the link to view their information.

- If the Employee exists but does not have an Employer relationship the Employee has not been associated to the participant/member. (See the screenshot below for an example of an Employee with no Employer relationship.)



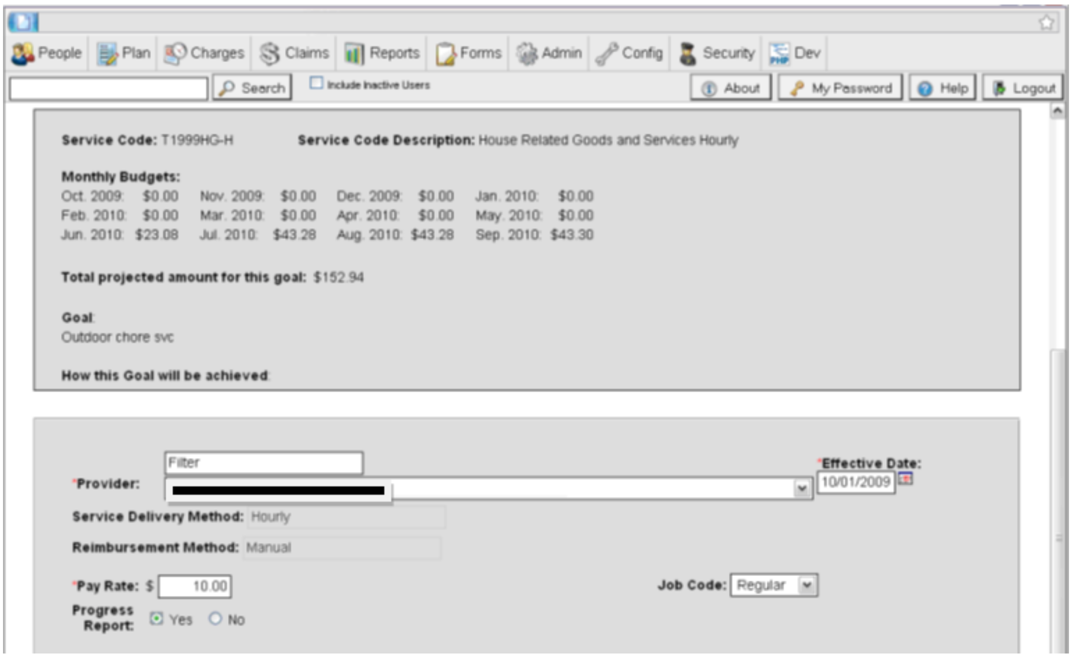
- Contact Enrollment and ask them if they have received the paperwork for the Employee. If Enrollment has the paperwork, ask them to create the relationship.

Invoice Services vs. Hourly Services

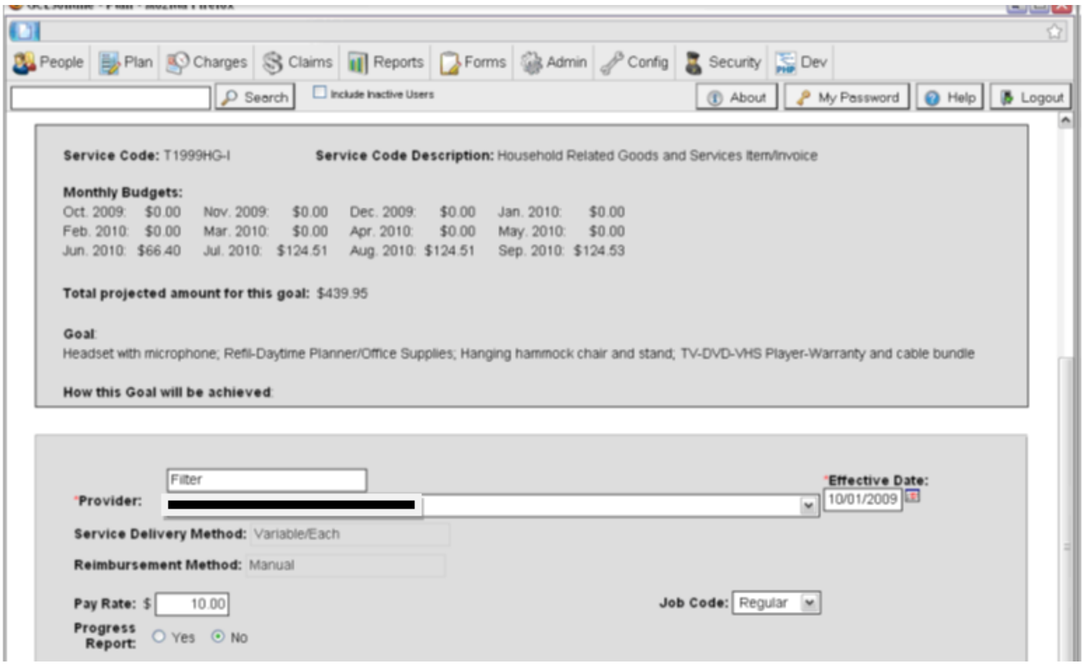
When you are adding a Provider to a Goal on a Plan and the Service Delivery Method for the service code can be either Hourly or Variable/Each, you must use the correct one:

- Variable/Each – for Contractors only
- Hourly – for Employees only

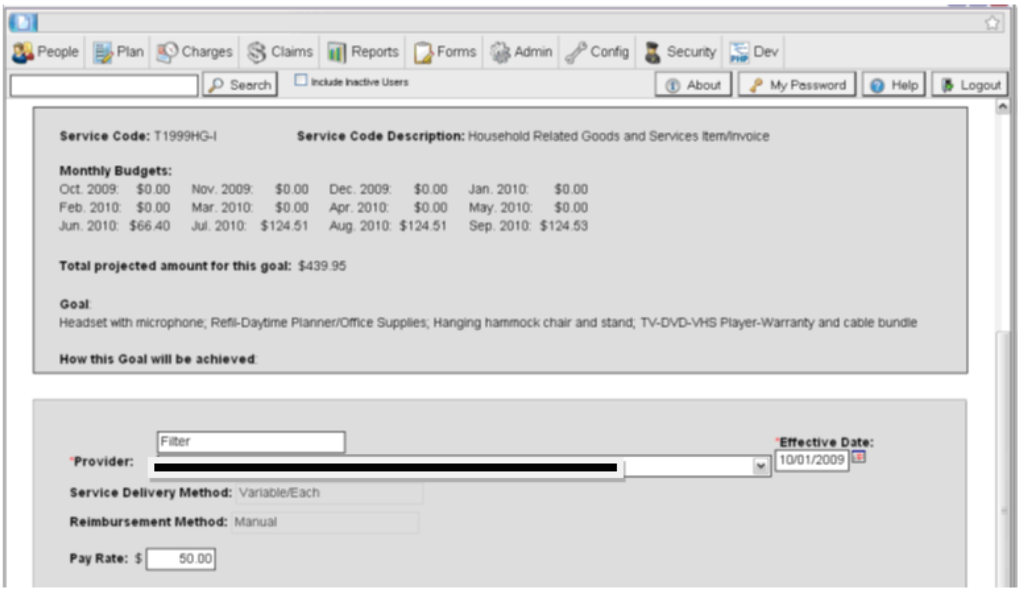
CORRECT Employee Hourly Example - The provider type is Employee and the Service Delivery Method is correctly selected as Hourly.



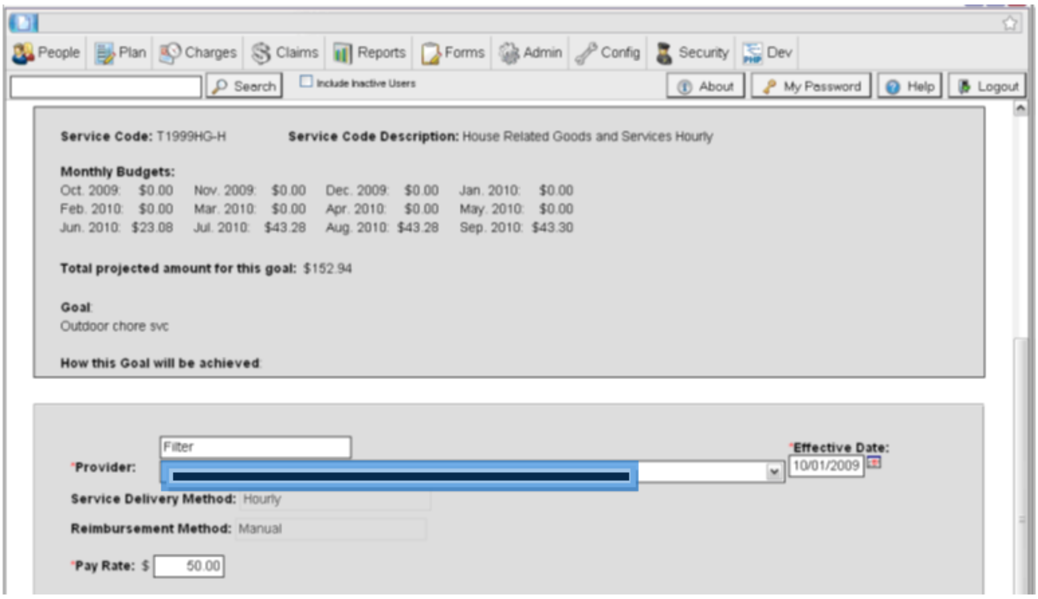
INCORRECT Services Provided Example - The provider type is Employee and the Service Delivery Method is incorrectly selected as Variable/Each.



CORRECT Contractor Hourly Example - The provider type is Contractor and the Service Delivery Method is correctly selected as Variable/Each.



INCORRECT Services Provided Example - The provider type is Contractor and the Service Delivery Method is incorrectly selected as Hourly.



Entering Mileage In FOCoS*online*

Description/Purpose

Processing a Mileage sheet

Software Access Required

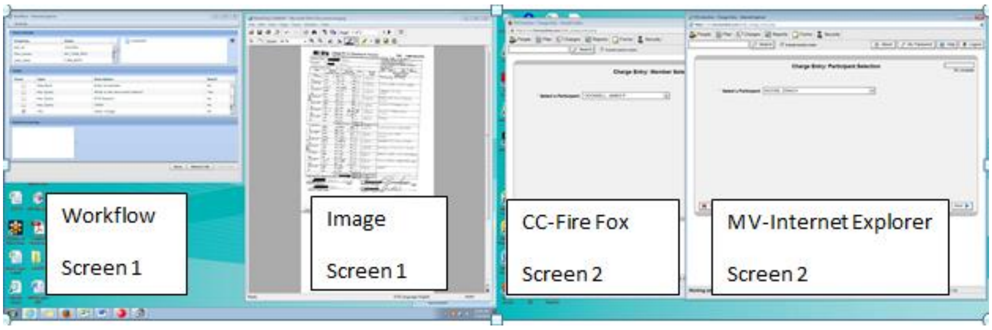
- Intraviewer (http://intraviewer/) Workflow queue
- FOCoS***online*** (https://nm.focosonline.com/nm/)
- Microsoft Office Document Imaging

Set up

You may set up your 2 monitors as shown in the example below

Screen 1: Your left screen will have the workflow queue and beside it will be your Microsoft Office imaging

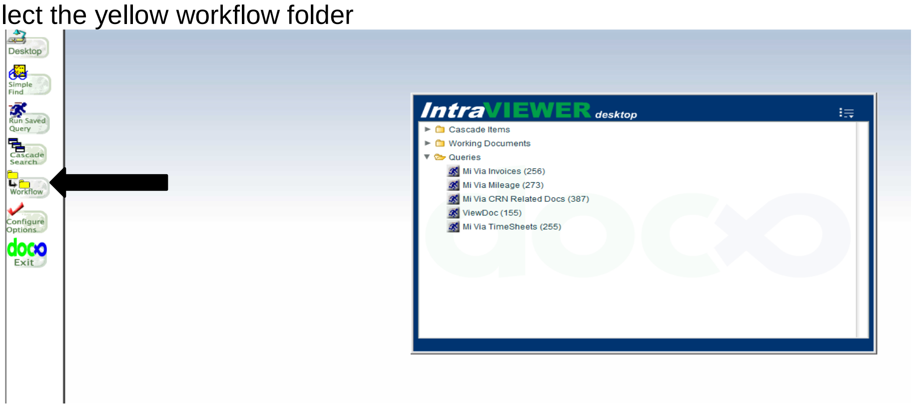
Screen 2: Your right screen will have Centennial Care FOCoS system in Firefox and beside it will be Mi Via FOCoS system in Internet Explorer



Steps

Intraviewer

1) Select the yellow workflow folder

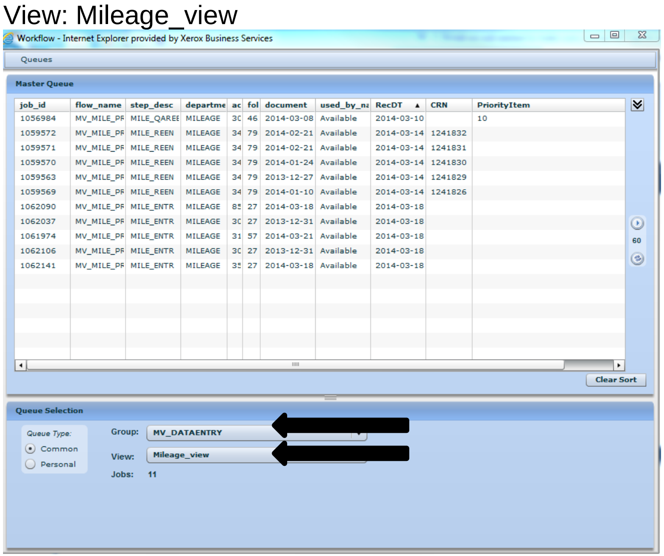


Your workflow queue should pop up

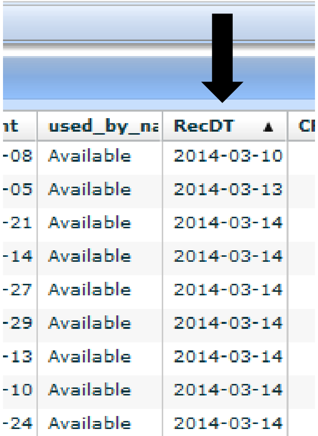
Set your queue

2) Group: MV_DataEntry

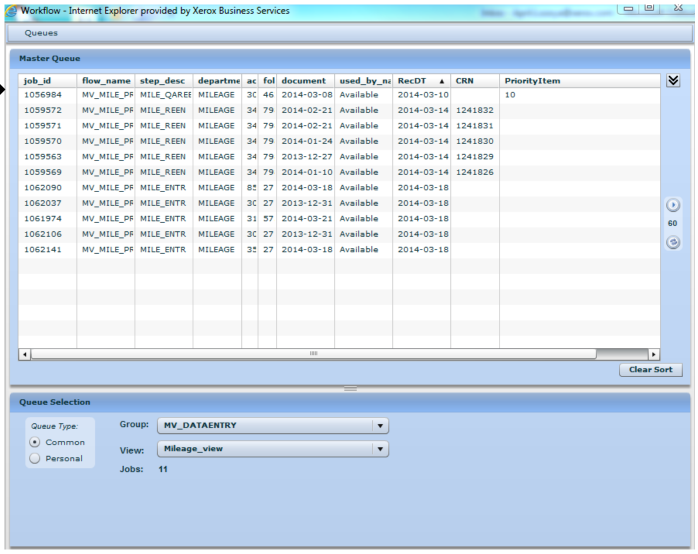
3) View: Mileage_view



4) Set your “RecDT” to the oldest date

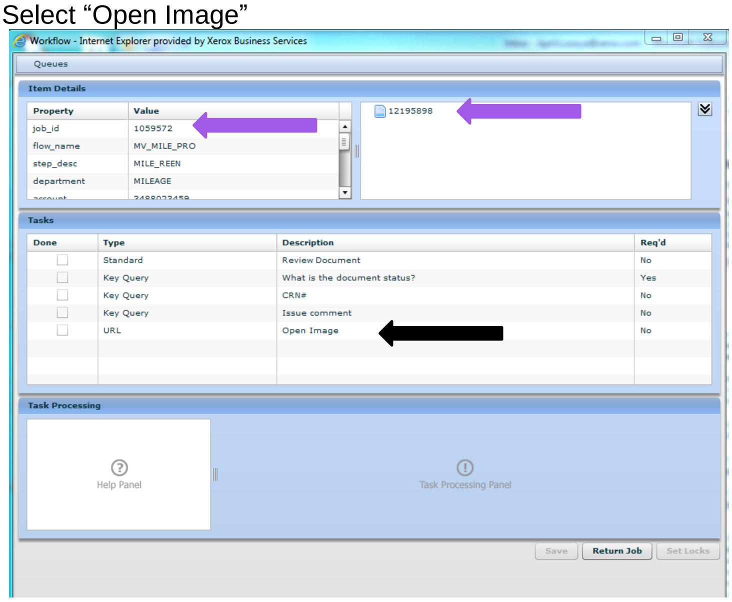


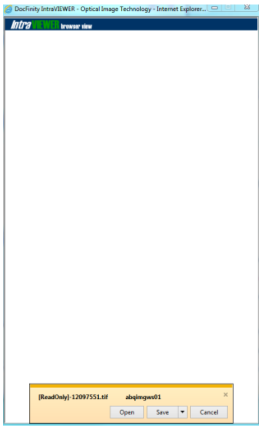
5) Select the first document at the top of the list



Your file queue has all the information you need to view the Mileage document Job_ID # 1059572 and Doc. # 12195898

6) Select “Open Image”



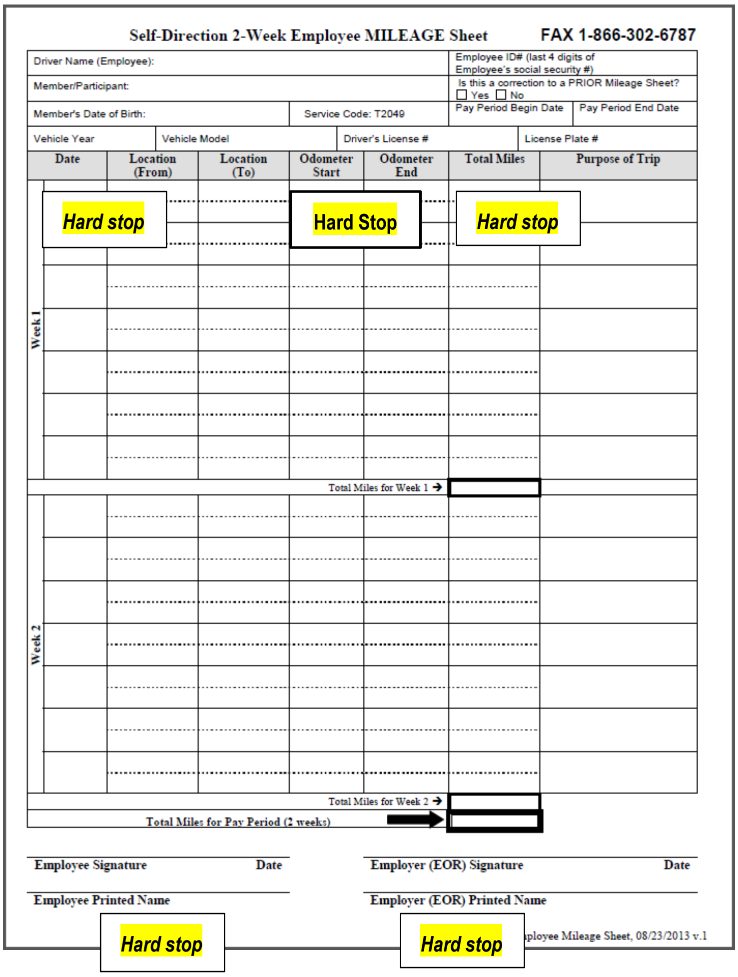


The image should pop up
Click “Open”

7) Check for signatures and signature dates

8) Make sure everything is filled out on the mileage sheet (Employee name, participant/member name, service dates, odometer start and end, total miles, and service codes)

9) If something is missing and it’s a hard stop, follow “Creating an RTP” process



Self-Direction 2-Week Employee MILEAGE Sheet **FAX 1-866-302-6787**

Driver Name (Employee):		Employee ID# (last 4 digits of Employee's social security #)	
Member/Participant:		Is this a correction to a PRIOR Mileage Sheet? ☐ Yes ☐ No	
Member's Date of Birth:	Service Code: T2049	Pay Period Begin Date	Pay Period End Date
Vehicle Year	Vehicle Model	Driver's License #	License Plate #

	Date	Location (From)	Location (To)	Odometer Start	Odometer End	Total Miles	Purpose of Trip
Week 1							
					Total Miles for Week 1 →		
Week 2							
					Total Miles for Week 2 →		
	Total Miles for Pay Period (2 weeks)						

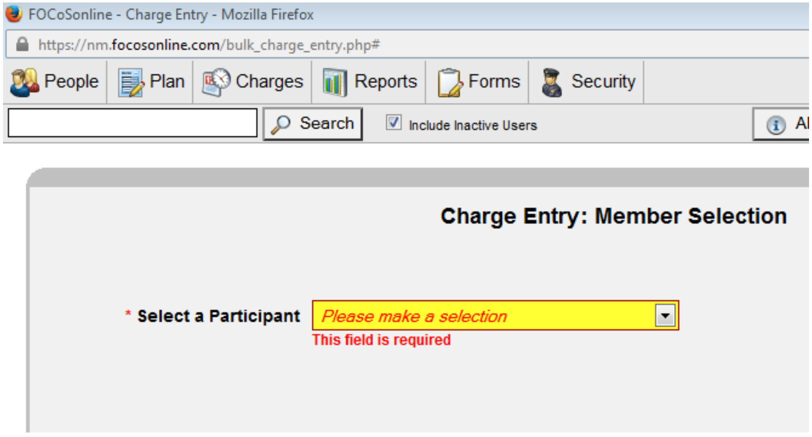
Employee Signature Date
Employee Printed Name
Employer (EOR) Signature Date
Employer (EOR) Printed Name

Employee Mileage Sheet, 08/23/2013 v.1

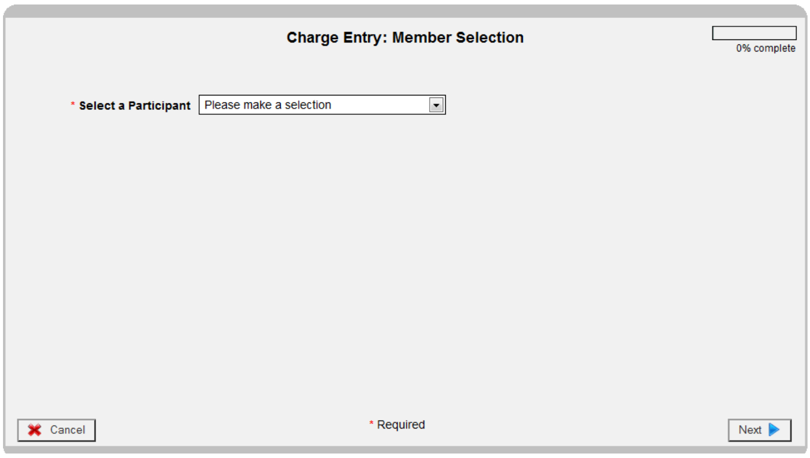
If everything checks out you may process the Mileage in FOCoS***online***

FOCoSonline

11) Click “Charges” button, select “Bulk Charge Entry” and check “Include Inactive Users” box



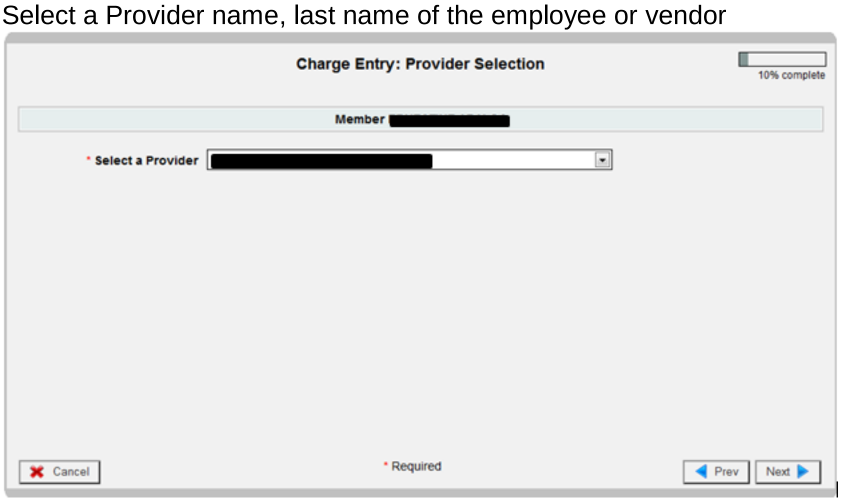
12) Select the participant’s /member’s name to be processed, last name first



13) Start with Centennial Care Firefox, if not in this CC system you will need to use the Mi Via system.

14) Click “Next” in bottom right corner

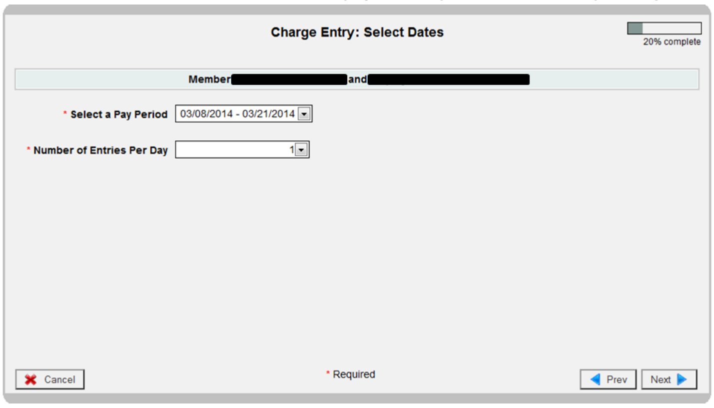
15) Select a Provider name, last name of the employee or vendor



16) Click “Next” in bottom right corner

17) Select the pay period to be processed (if vendor enter date range like a PRF)

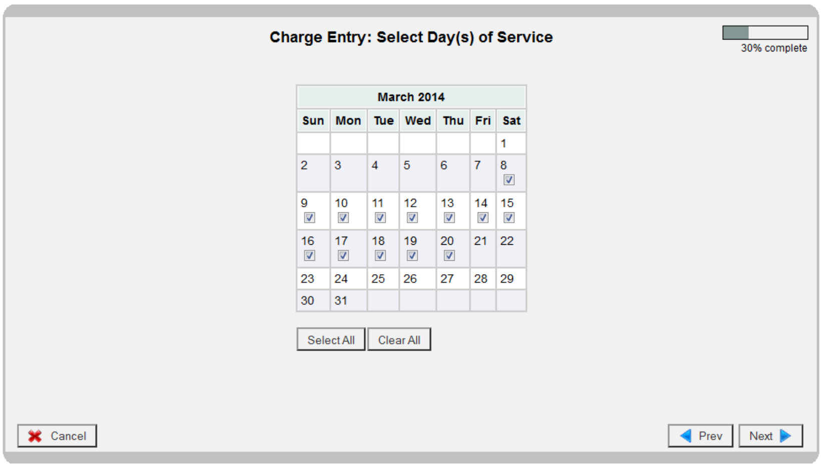
18) If there is more than one entry per day, add the days together



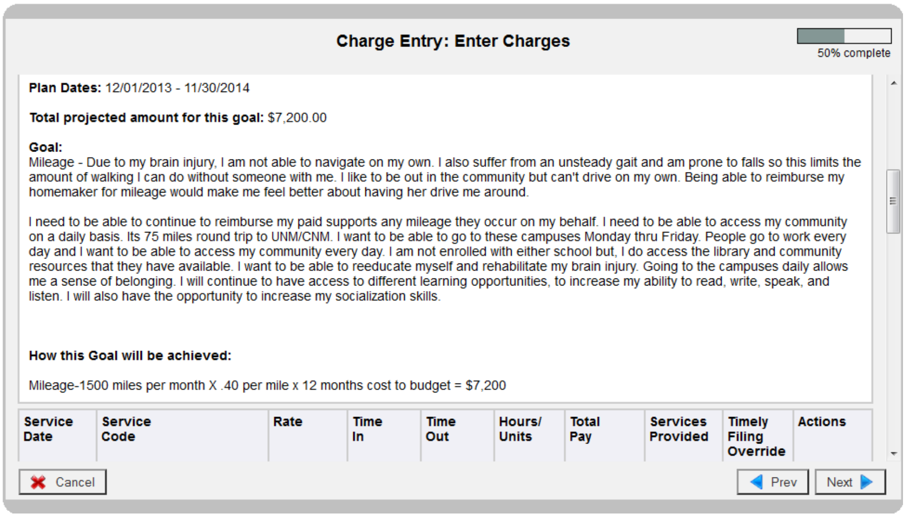
19) Click “Next” in bottom right corner

20) Select the dates requested on the mileage sheet

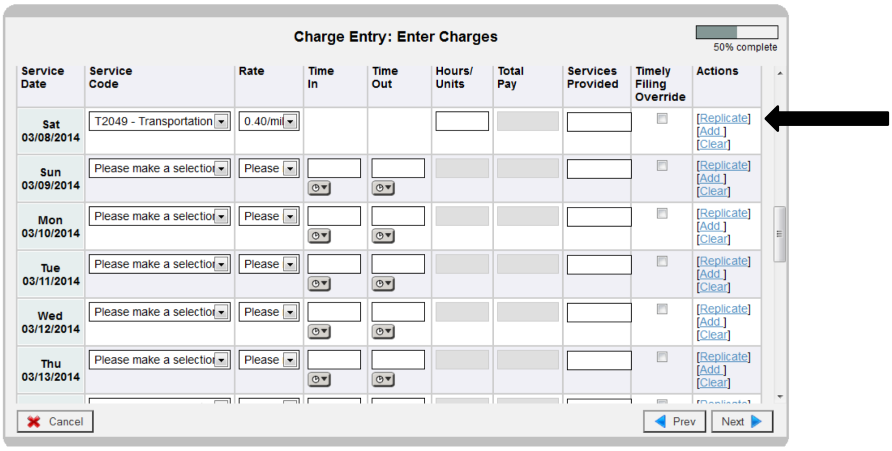
21) Click “Next” in bottom right corner



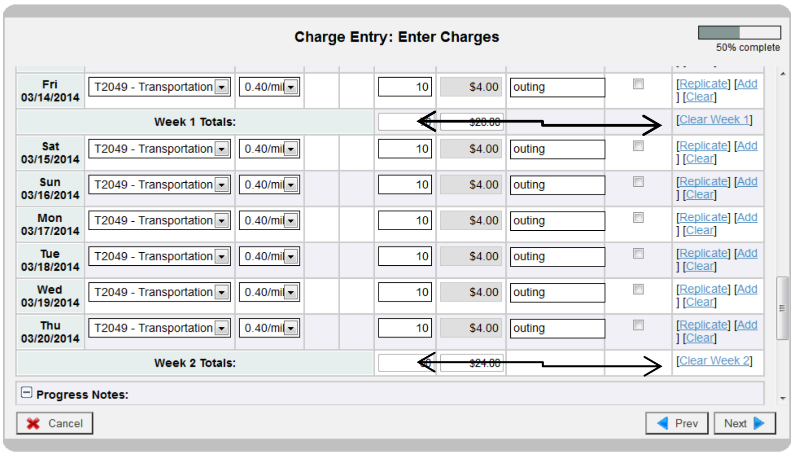
22) You will be in “Charge Entry: Enter Charges” screen
    A. Verify you have the correct participant/member and employee compared to the mileage sheet you are processing. Re-check the employer of record (EOR) signature/signature date and the employee signature/signature date. Verify FOCoS***online*** screen matches the mileage sheet.



B. Use the scroll bar to the right to view the dates selected
C. Enter the service code requested, rate should auto populate, enter units and description of services provided
D. If all the times are the same on time sheet you may select the “replicate” so the system will auto fill the dates you have selected.



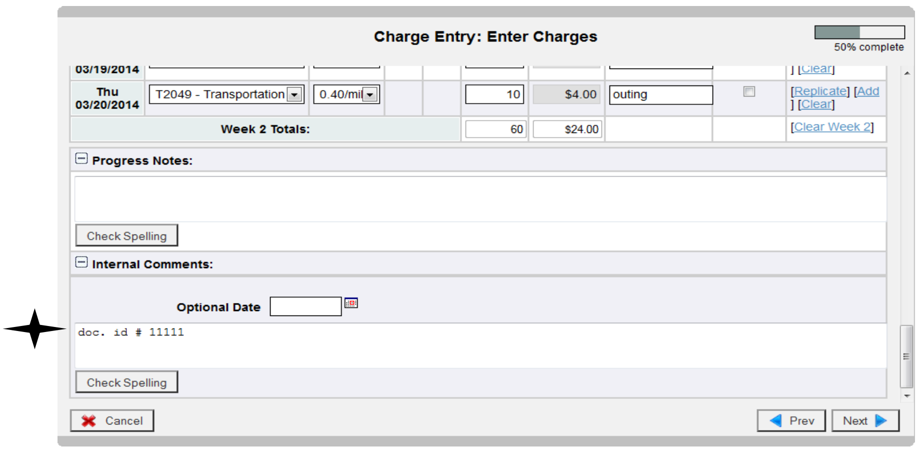
Check week 1 and week 2 for the total amount requested matches the miles on Mileage sheet received



RTP template is “Templates 2012-04-03” located in org _unit -I: drive \\abq01\org_unit\Mi_Via\Data_Processing

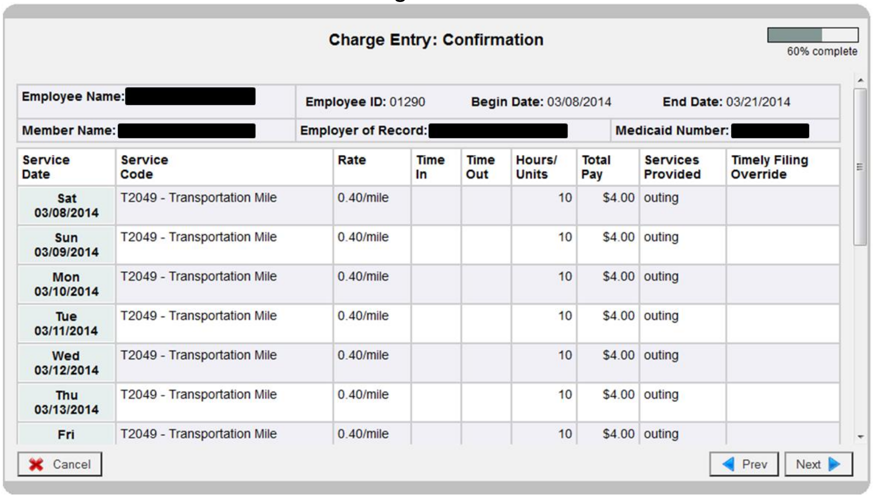
Refer to “Creating an RTP” process.

23) Enter the Doc ID from Workflow in “Internal Comments”



24) Click “Next” in bottom right corner

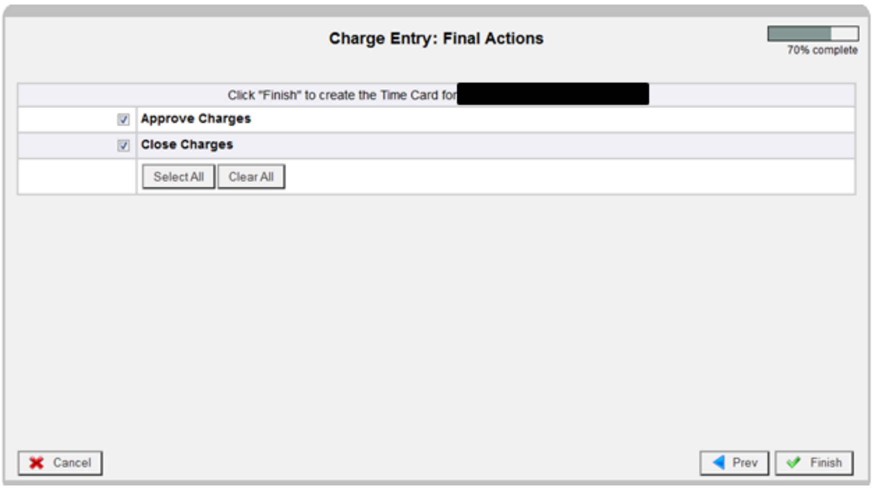
You will be at the “Charge Entry: Confrimation” screen. Verify the information entered in FOCoS***online*** matches the mileage sheet.



Service Date	Service Code	Rate	Time In	Time Out	Hours/ Units	Total Pay	Services Provided	Timely Filing Override
Sat 03/08/2014	T2049 - Transportation Mile	0.40/mile			10	$4.00	outing	
Sun 03/09/2014	T2049 - Transportation Mile	0.40/mile			10	$4.00	outing	
Mon 03/10/2014	T2049 - Transportation Mile	0.40/mile			10	$4.00	outing	
Tue 03/11/2014	T2049 - Transportation Mile	0.40/mile			10	$4.00	outing	
Wed 03/12/2014	T2049 - Transportation Mile	0.40/mile			10	$4.00	outing	
Thu 03/13/2014	T2049 - Transportation Mile	0.40/mile			10	$4.00	outing	
Fri	T2049 - Transportation Mile	0.40/mile			10	$4.00	outing	

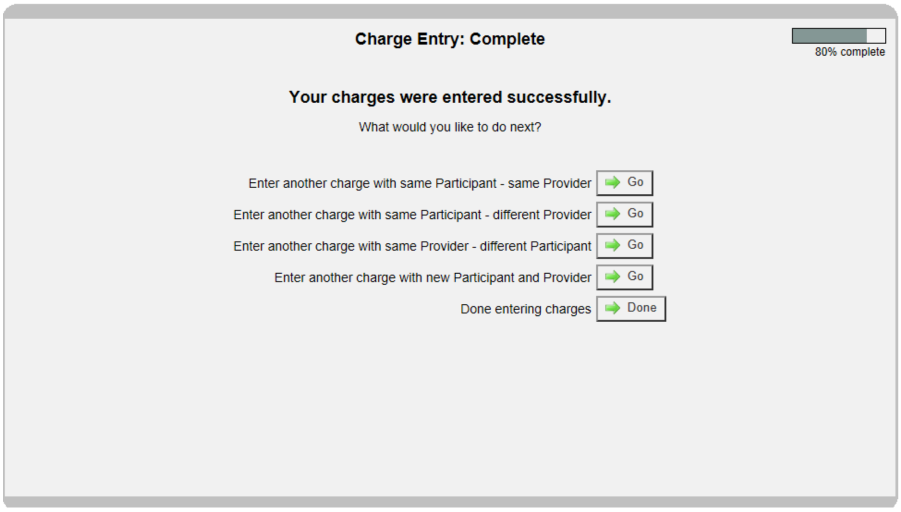
25) Click “Next” in bottom right corner

26) Click “Select All” to check off both boxes

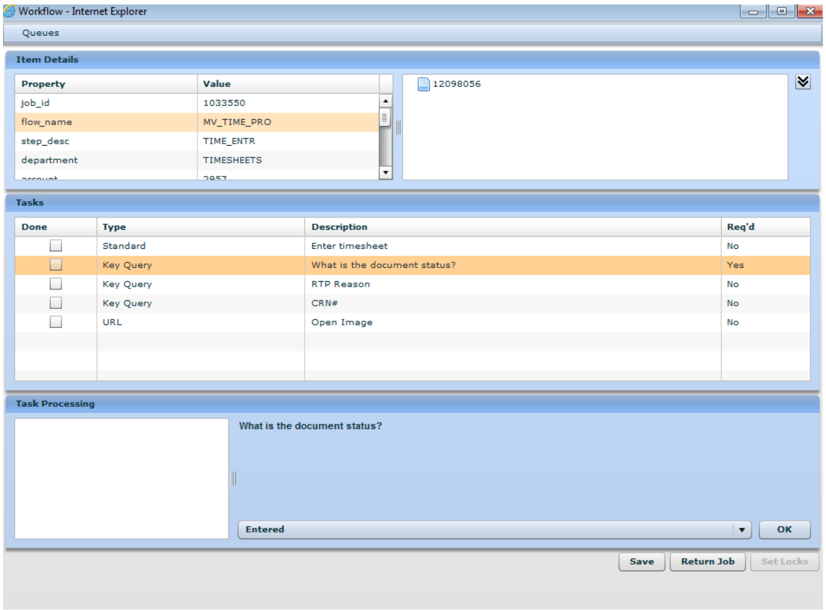


27) Click “Finish” in bottom right corner

This means you have processed the mileage sucessfully



Go to Workflow queue, answer the questions, and click "Save" in bottom right corner



Accessing CRM

Creating Research Issues

Description/Purpose

When the Data Entry team receives a document that needs research due to an issue or error message that has occurred while keying (i.e.: employee/vendor has unprocessed form, missing relationship status, etc.) a research issue is created. Until the issue has been resolved by a liaison the document cannot be processed for payment.

Software Access Required

- FOCoS***online*** (https://nm.focosonline.com/nm/)
- Microsoft Dynamics CRM

Steps

MS Dynamics/CRM

Set to: Contact and Services

Search by: Social Security Number

Select Cases:

- Click "Add New Case" (participant/member will be pull into system)

Source: Inbound Fax/Scan

Category: a) MV Research Issues

Subject: Select category from drop down

- Click "SAVE"

Assignment Information: Change owner to Mi Via Liaisons

Click "OK"

<u>Notes and Attachments</u>: Add a New Note

- Participant/Member:
- Employee or Vendor:
- Service Codes:
- Dates of service:
- Requested:
- Entered:
- Corrections needed:
- Centennial Care or Mi Via:
- Doc ID:

  Click "SAVE"

Close all screens from Microsoft Dynamics

Creating an RTP

Description/Purpose

When the Data Entry team receives a document that needs research due to an issue or error message that has occurred while keying (i.e.: employee/vendor has unprocessed form, missing relationship status, etc.) a research issue is created. Until the issue has been resolved by a liaison the document cannot be processed for payment.

<u>Software Access Required</u>

- FOCoS***online*** (https://nm.focosonline.com/nm/)
- Microsoft Dynamics CRM

Steps

<u>Create a Reference Number in CRM</u>

Owner: Data Entry

- Data Entry will identify obvious errors to RTP and attach the document to the CRN.
  - The liaisons will research if any errors were not identified by Data Entry and the paperwork is for the correct participant/member.
  - The liaisons will notify Data Entry of other issues identified or are able to process the paperwork sent for RTP and update the CRN.
  - If the RTP is able to be processed, Data Entry will pull the document from Workflow and process.
- Search by: Participant Social Security Number
  - Select Cases:
    - Click on Add New Case (participant will pull into system)
  - Source: Inbound Fax/Scan
  - Category: MV RTP/MV Educational RTP
  - Subject: Select Subject from drop down
- Click "SAVE"
- Assignment Information: **<u>Change owner to MV Liaison</u>** so they will make one outbound call attempt
- Click "OK"
- Notes: Add a New Note
  - Participant/Member: PARTICIPANT NAME (First initial, last name only)
  - Employee or Vendor: EE OR VENDOR NAME
  - Service Codes:
  - Dates of service: Ex: 01/01/2014-01/15/2014 or the PRF Date

  - Requested:
  - Entered:
  - Corrections needed: Please submit PRF, Timesheet or Miles payment with the following correction; For example Missing signatures of the Employee of Record
  - Centennial Care or Mi Via:
  - Doc ID: xxxxxxx
- Save & close CRN
- In Workflow, fill out the required fields (Status, RTP Reason, CRN#)
- Click "Save"

Note: FOCoS***online*** "Internal Comments" must have the CRN # if this is a partial payment

Close all screens from Microsoft Dynamics

Things to consider:

- We received a payment request and it is faint. You are 100% sure you can key it; we do not require another payment request to be faxed in.
- We received a Payment request and the time stamp is covering the signature partially due to our fax machine. We do not require another payment request fax in. We would key it.
- 2 pay periods on the 1 timesheet. We key in the 1st pay period and RTP the remaining. .
- Service codes on PRF's, timesheets or miles: If the service codes are listed as partial. We key it in and send an Educational only once. If they sent it in the 2nd time with partial service codes, we RTP and don't key it in.
- Do not enter a PRF, Timesheet or Mileage if there are no service codes on the form. Create an RTP, even if the plan only includes one service code.
- Signature dates. If we have EOR/Part signed it on 04/01/14 and EE signed it on 05/01/14 and the last day of worked is 5/01/14. We would RTP it out and we don't key it. Both signature dates need to be on or after the dates of service. The EOR signature dates must acknowledge the approval of the TS. If they faxed it in before their shift is completed, we will not key anything.
- All invoices must include the company name.
- If we receive a receipt dated more than 1 year, the PRF can be entered. There is no time limit.