Portal Quick Reference Guide (QRG) for Providers

GAINWELL TECHNOLOGIES

Welcome to Portal's Quick Reference Guide, a comprehensive system designed to streamline access to clinical review documents and information for providers. Within Portal, providers can effortlessly locate medical record requests, verify claims status, submit appeals, upload medical records, and run reports. This user-friendly guide has been created to walk you through these essential tasks, providing a step-by-step breakdown of how to successfully accomplish them. This reference guide will equip you with the knowledge and confidence to navigate Portal efficiently and effectively. Let's dive in and explore the world of simplified medical record review management together.

Contents

Logging into Portal

Welcome to the Quick Reference Guide for logging into the Portal. This guide will provide you with simplified instructions to quickly access the system. By following these steps, you'll be able to log in efficiently and start utilizing the Portal's features. Let's get started!

Step 1: Access Portal

1. Open your preferred web browser (Microsoft Edge or Google Chrome) and visit the following URL: https://hmsportal.hms.com.

Step 2: On the Portal's login page, enter your username and password in the designated fields.

Note: Be sure to enter the correct information as provided by your system administrator.

Step 3: Click the *Login* button to initiate the login process.
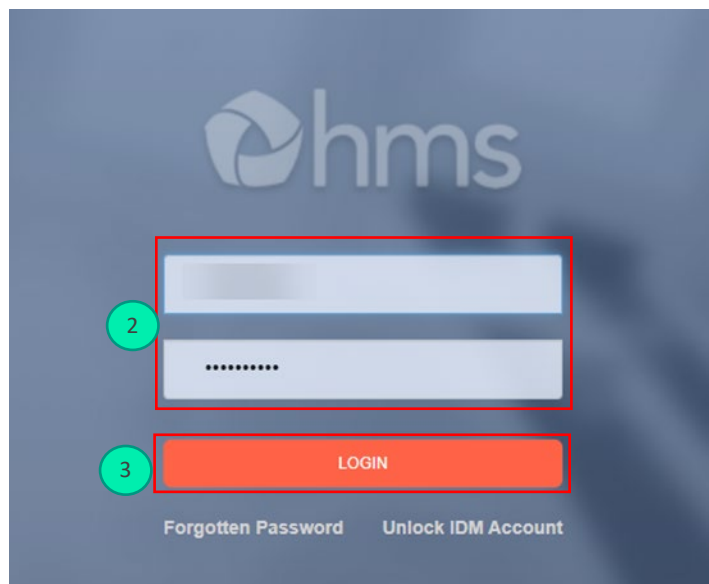
My Workload

After logging into Portal, you will arrive at My Workload. Here you will find a task list, if you have any tasks they will be located here. This page will contain items and/or letters that you will need to act on. If there are no items, then there are no tasks that need your attention. At the top of the page, there are options for which you can drill down on Lines of Business (Utilization Review and Disallowance), Providers, and Clients.

When working in My Workload the items for which you will need to take action will appear under the Letter Type section. Once a medical record request is generated it will appear here (see Image A).

Different action is required depending on the Letter Type.

1. Medical Record Requests
2. Denial Letters
3. Appeal Upheld Letters

Step 1: Click on the Letter Type

Step 2: Click on *View Claims* this will take you to the Claims tab. Follow the steps outlined in the Claims section of the QRG.
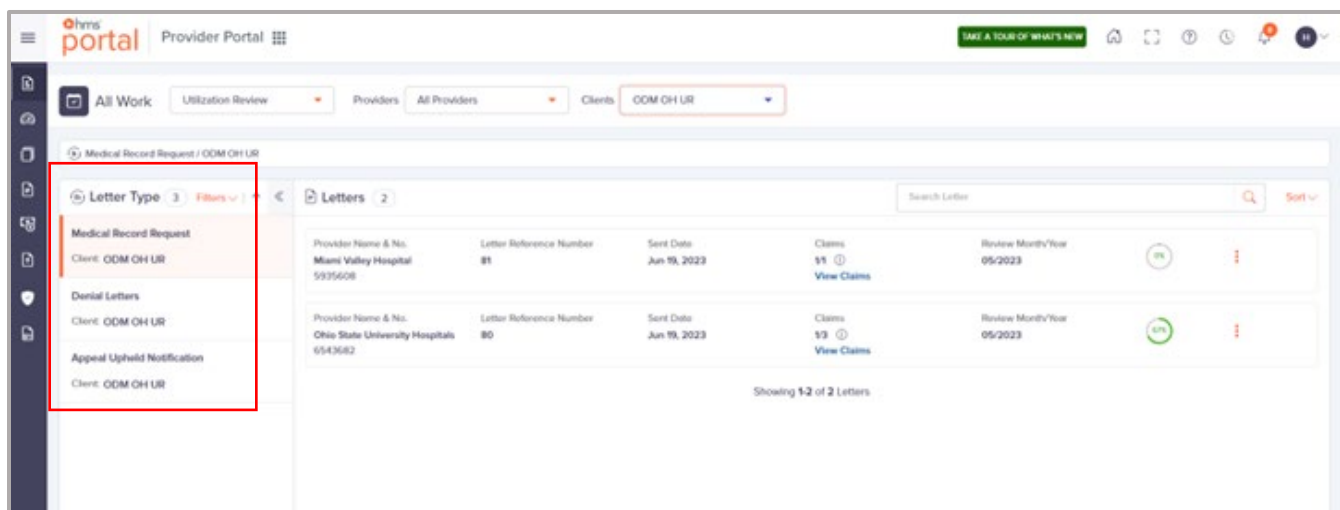

Image A

Portal Homepage Overview

After logging into Portal, you will need to navigate to the dashboard. The dashboard will give the user an overall idea of the status of the claim and the location of the claim. You can also click on the fields located on the dashboard.

Providers:

Step 1: Click on the Dashboard icon or click on the hamburger icon and select Dashboard.

Step 2: Click on the drop-down arrow and select the provider.

Line of Business

Step 3: Click on the drop-down arrow and select the appropriate line of business.

Claims Summary – Utilization Review.

Step 4: Click on the different *Claims Summaries – Utilization Review*
- Initial Reviews
- Medical Records Received
- Medical records requested for review.
- Review complete finding determined.

Medical Records Requested for Review

Step 5: Click on the *Review Claims*

Here you can hover over each icon to see what it does. If you have an orange circle it indicates notifications.
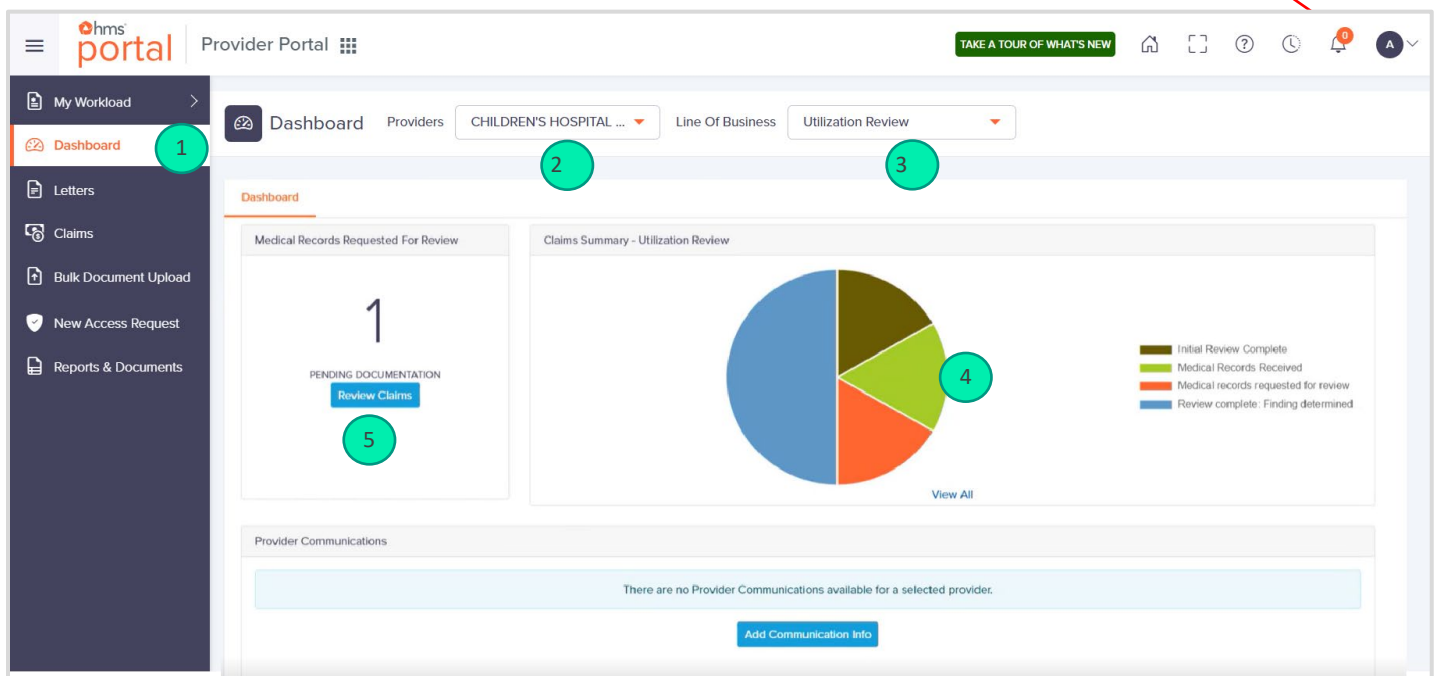
Below are the statuses and definitions that appear on the dashboard pie chart and throughout the portal for claim status:

| Status	Definition
Medical Records Requested for Review	Claims were requested for review, Permedion waiting on the provider to provide medical record.
Medical Records Received	Provider has submitted and Permedion has received medical records.
Medical Records Received – Under Review	Permedion is currently reviewing medical record received by the provider.
Medical Records Requested for Review (Reminder Sent)	Provider has received a reminder to submit their medical records for initial review
Initial Review Complete	Permedion has completed its initial review of submitted medical records.
Review Complete: No Findings	Permedion has approved claim and there are no adverse findings.
Review Complete: Finding Determined	Permedion has denied claim with an adverse determination.
Review Complete: Missing Documentation	Permedion has completed its initial review and has issued a technical denial due to incomplete record missing information
Technical Denial Finding Due to No Medical Records Received	Technical denial issued due to provider not submitting medical records for the initial review process.
Reporting	Permedion has determined the Presentation on Admission (POA) was incorrectly submitted and was changed for reporting purposes. The provider's reimbursement will not be affected based on these findings.
Request For Appeal Received	Provider has submitted and Permedion has received appeal.
SURS 1st Level Appeal Received	Permedion has received a first level appeal from provider, pending appeal response from SURS
Request For Appeal Received – Under Review	Appeal received and Permedion is in the process of reviewing.
TD Modified	The original technical denial decision was modified to another decision.
Appeal Review Complete: Original Finding Overturned	Overturn decision rendered after receipt of appeal and completion of appeal review
Appeal Review Complete: Original Finding Upheld	Upheld decision rendered after receipt of appeal and completion of appeal review
Appeal Request Denied Due to Untimely Submission	Permedion received a late request for appeal and will not be processing due to untimeliness
SURS 2nd Level Appeal Received	Permedion has received a second level appeal from provider, pending appeal response from SURS
SURS Appeal Response – Overturned	ODM SURS overturned the denial that Permedion issued on the claim.
SURS Appeal Response – Upheld	ODM SURS upheld the denial that Permedion issued on the claim.

Locating Letters

Now, we will move on to how to locate Letters within the Portal system.

Step 1: Click on the *Letters* tab or click on the hamburger icon and select the *Letters* tab.

Step 2: Click on the *Clients* drop-down arrow and select the *Client* (If multiple clients, click on the appropriate client).
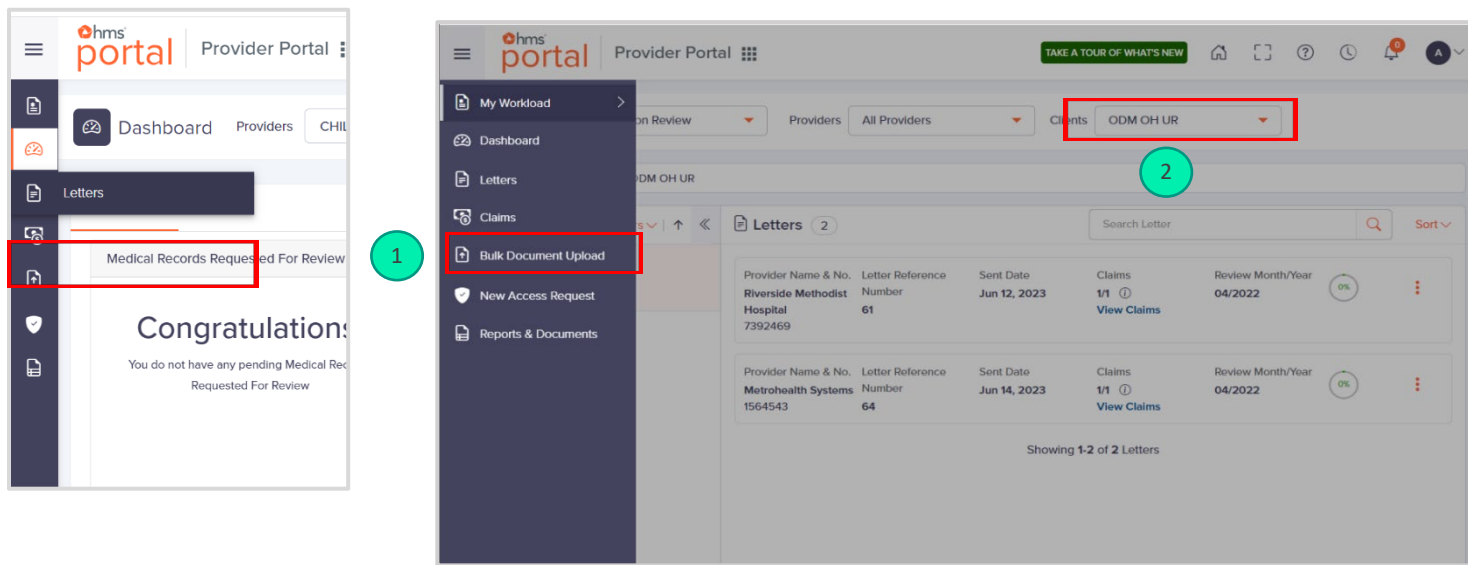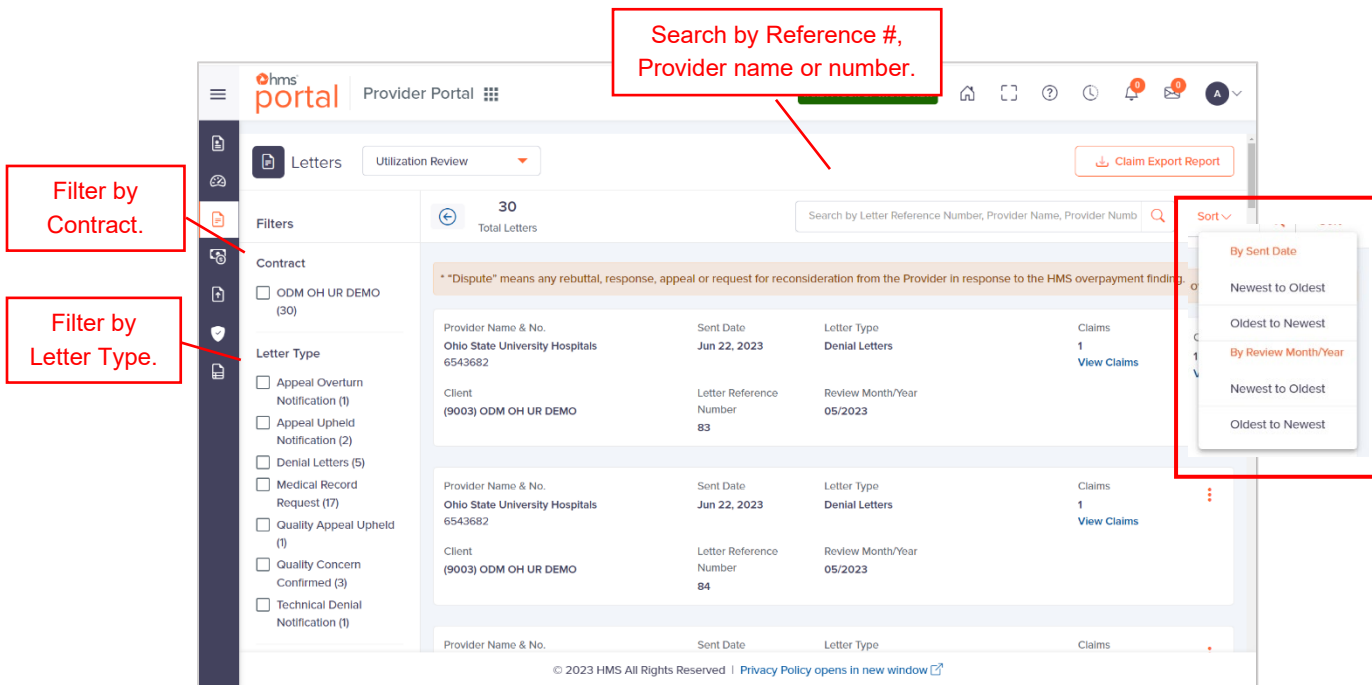

Step 3: Click on the three dots to the far right of each letter to view as a .pdf or download as an Excel file.
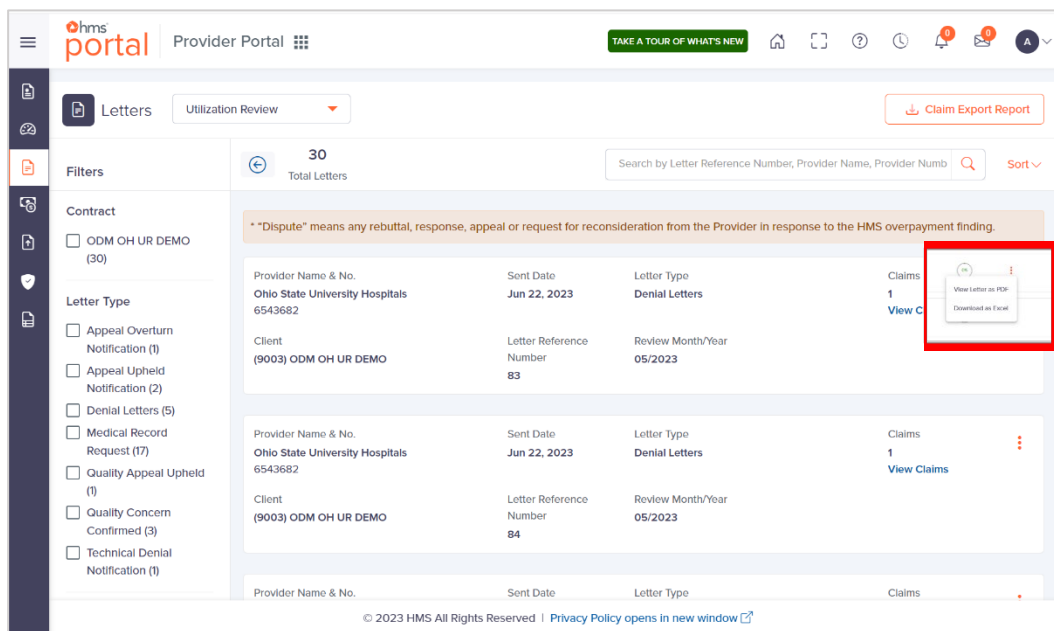
Filtering Letters:

You can filter letters by Contract, Letter type, and via search parameters (letter reference number, provider name, and provider number.) You can also sort letters, see image below.

Review Status of Claim

To review the status of a claim once a medical record has been located, a provider can look at the pdf or Excel file that they downloaded. The provider can also check the status of a claim through the Claim tab.

- ## Verifying a claim via the Excel File

Step 1: Verify *Claim number.*

Step 2: Verify *Finding name.*

Step 3: Verify *Claim Status/*

Step 4: Verify *Claim Status Updated* date.

- Downloading the letter as PDF

Ohio Medicaid Utilization Review Program - Inpatient

permedion
A Gainwell Technologies Company

Date:

To:

From: Anthony J. Beisler, MD, MBA, FACS, CHCQM
       Medical Director
       Permedion

Re: Apparently did not demonstrate that patient was ready for discharge.

PATIENT NAME:	LNAME, FNAME
RECIPIENT ID:	17557050
RECIPIENT DOB:	8/7/2011
ATTENDING PHYSICIAN:	
OHIO LICENSE NO.:	
OHIO MEDICAID PROVIDER NO.:	
FACILITY NAME:	CHILDREN'S HOSPITAL AKRON
FACILTIY PROVIDER NO.:	1473203
PERMEDION ID:	17557050-1
ADMISSION DATE:	7/13/2016
REVIEW MONTH:	04/22

Accessing a Claim via Claims Tab
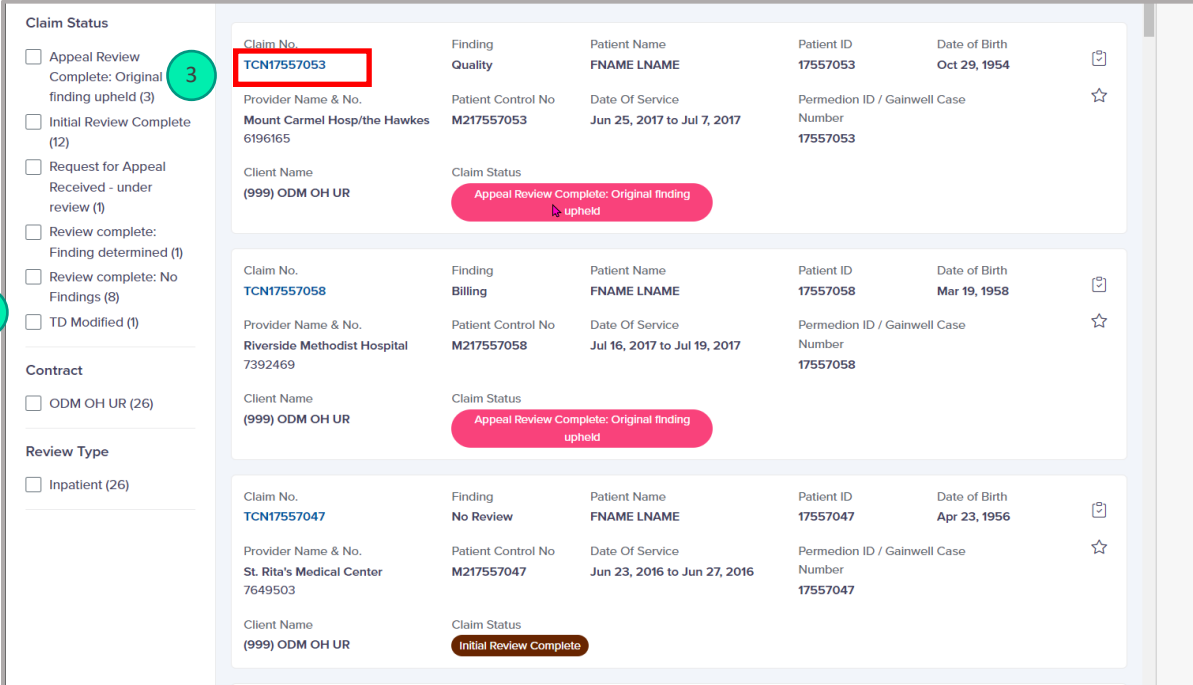
Step 1: Click on the hamburger icon *in* the upper left-hand corner or hover over the claims icon and then click on ***Claims***.
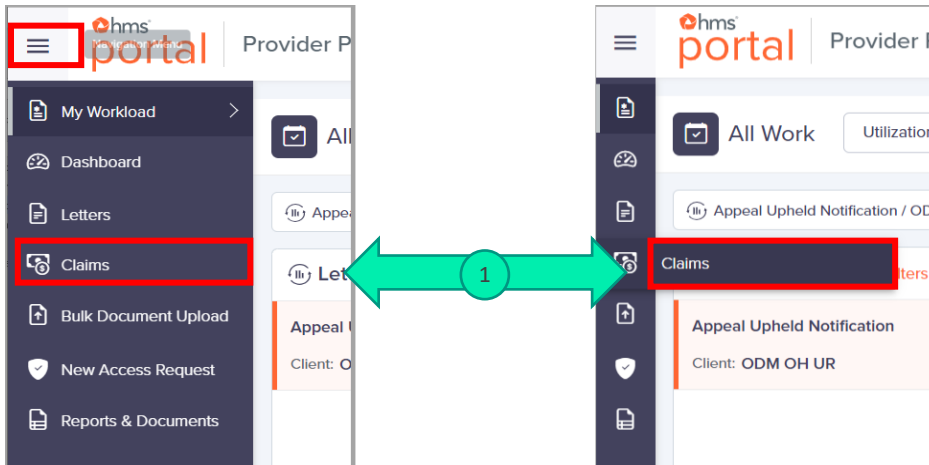
Step 2: The Claims page option will open; locate the claim you want to verify.

Note: From the claims page you will see all the claims associated with that provider. Each one will have the Claim number, the finding, the patient's name, ID & DoB, Provider Name & No, the Patient's Control No, DoS, Case #, Client Name, and Claim Status. To get a more detailed breakdown of the claim you need to click on the Claim No.

Step 3: Click on the *Claim No*. to get a more detailed look at the claim.

Claims Overview

The claim has the patient details, provider details, and payment details.

Step 1: Click on *Letters,* to access the letter associated with the claim.

Step 2: Click on *Documents,* to upload or access any documentation associated with the claim.

Step 3: Click on *Activity,* to see the activity on the claim.

Step 4: Click on the **Star** to mark the claim as Important.

Uploading Documents/Medical Records and/or Submitting an Appeal

Uploading and submitting an Appeal Through the Claim

There are two places a provider can upload documents. A provider can upload medical records or other documentation via the Claims page or via Bulk Document Upload.
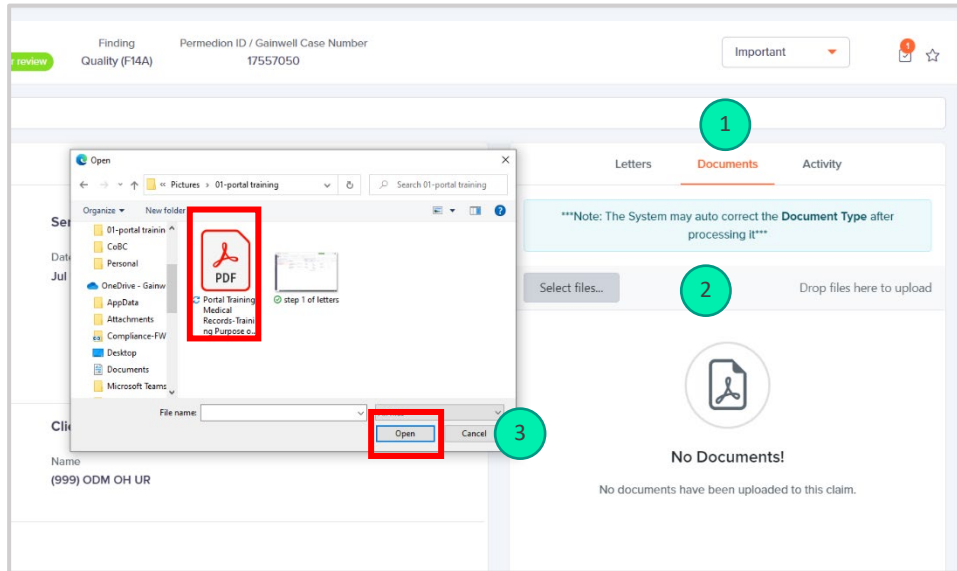
After navigating to the claim details, you will see to the right a place to upload documents.

Step 1: Click on **Documents**

Step 2: Click on **Select files** or *drag and drop files to the location.*

Step 3: Locate and click **Open** to add the file you want to the claim.

Note: Only PDFs can be uploaded here. Files can also be drag and dropped.
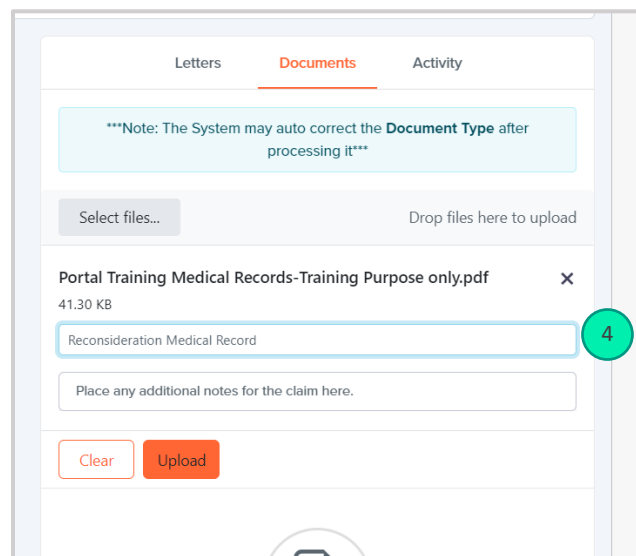
Step 4: Click and select one of the following:

- For an appeal: ***Reconsideration Medical Record***
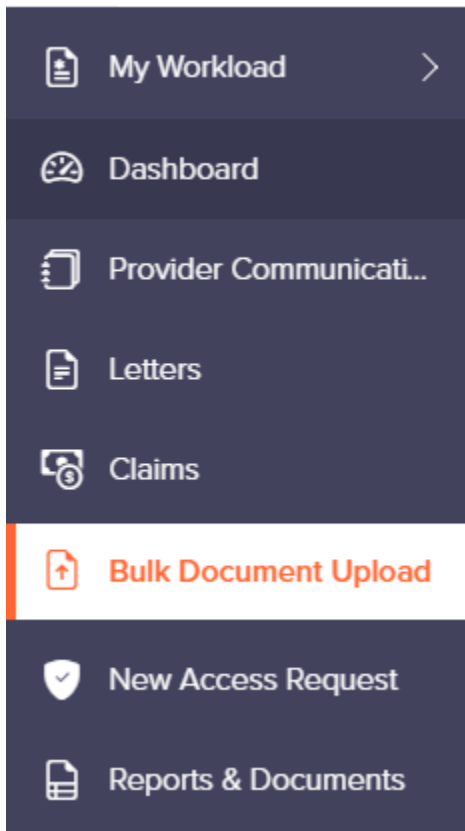- For Medical record request documentation upload*: **Medical Record Docs***

Step 5: Place any additional notes pertaining to the claim here.
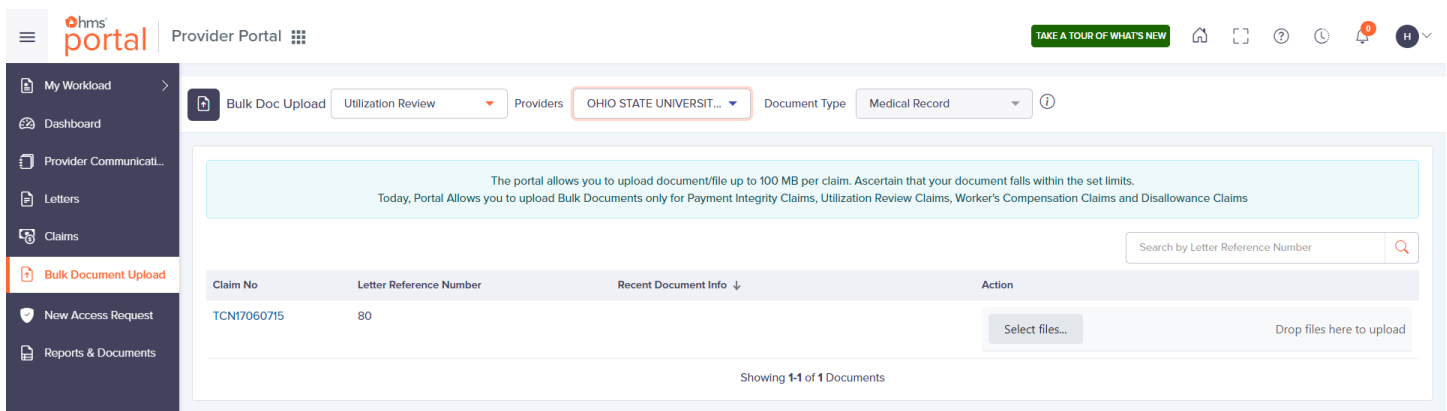
Step 6: Click ***Upload.***

Bulk Document Upload

Providers can also upload medical records through our Bulk Upload option.

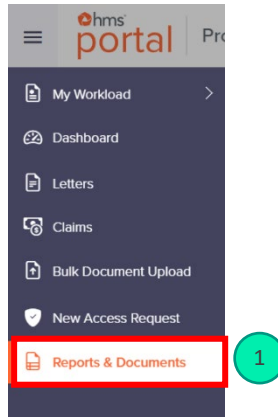Select **Bulk Document Upload**

Select **Provider** and **Document Type**

Claim numbers will load according to that provider and document type.

Select files that correspond to that claim number.

Reporting

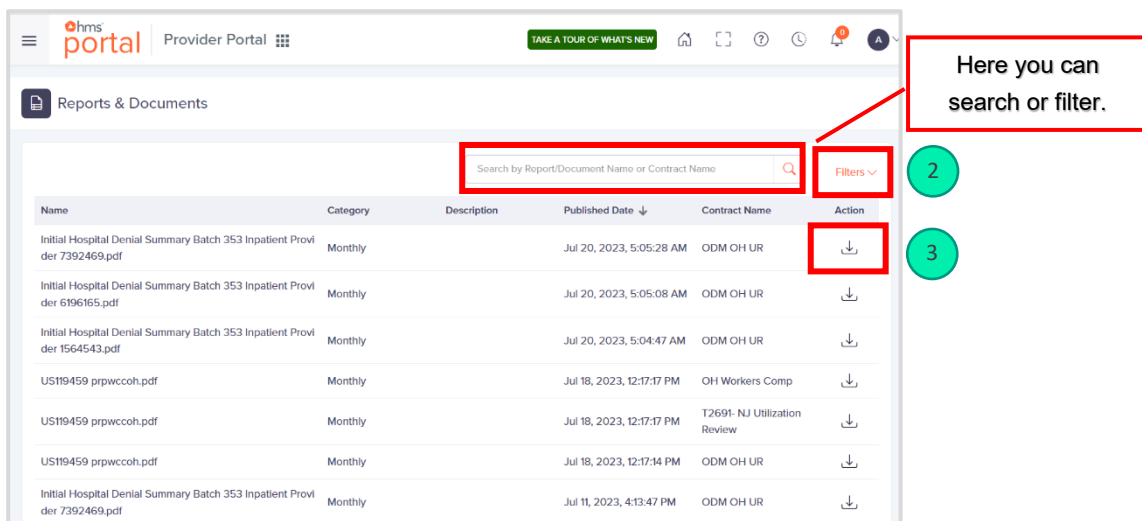Now we will cover how to download a report in the Portal system.

Step 1: Click on **Reports & Documents** from the menu.

The Reports & Documents section will open. Here a list of reports will appear.

Step 2: Locate the report you want to download. Reports can be searched by **Report/Document Name** or **Contract Name** or filtered down by "**All'** or **Monthly.**

Step 3: Click the **download icon.**