



Medicaid Information Technology System

State & Local Government Solutions

Medicaid Information Technology System (MITS)

Other Insurance Maintenance Participant Guide

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**HP Enterprise Services
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Course Overview

Overview

The goal of this course is to provide you with the skills required to perform tasks associated with Other Insurance (OI) maintenance in Ohio MITS.

Objective(s)

After completing this course you should be able to:

- Search for OI plans
- Add an OI plan
- Add or update OI plan data
- Add or update benefit coverage rules
- Copy an OI plan
- End an OI plan

Agenda

Topic	Time
Welcome and Introductions	10 minutes
Other Insurance Information	30 minutes
Searching for OI Plans	30 minutes
Break	15 minutes
Adding an OI Plan	45 minutes
Adding or Updating OI Plan Data	45 minutes
Lunch	1 hour
Adding or Updating Benefit Coverage Rules	45 minutes
Copying an OI Plan	45 minutes
Break	15 minutes
Ending an OI Plan	30 minutes
Review	15 minutes

Prerequisites

Before taking this course, you must complete the following course:

- Introduction to MITS
- Overview of Claims Processing
- Benefit Plan Administration Overview (eLearning)
- Benefit Classifications

Other Insurance Information

Overview

In this topic you learn about the maintenance of OI plans.

Other Insurance Features

Other Insurance (OI) identifies the types of third party health coverage, if any, for a recipient. The Benefit Plan Administration (BPA) subsystem manages the benefits and rules applied in processing claims for cost avoidance.

The OI tools support the state's individual needs to define how services are covered by other insurance. Ohio MITS contains plans for commercial insurance, Medicare Part A, and Medicare Part B. Benefit coverage associated with an OI plan cannot be assigned to the plan until you add the applicable benefit classification to MITS.

Other Insurance Rules

There are three types of rules in MITS that control processing and payment of claims. In order to pay a claim, the following three rule types must be followed:

- **Recipient Plan rules** – Determines the services for which a Medicaid recipient is eligible, based on the defined benefit plans and hierarchies.
- **Provider Contract rules** – Determines whether the provider is authorized to perform, refer, or bill for a particular service. Provider contract rules are based on a combination of provider types and specialties.
- **Reimbursement Agreement rules** – Defines pricing methodologies and adjustment factors that may be applied to a given service.

Taken together, these three rule types indicate who can receive a service, who can perform or be paid for the service, and what reimbursement methodology is applied to the service. There is a fourth type of business rule that MITS also considers. The fourth rule type is OI. OI, also referred to as third party liability plans, can cover some of the services that the state Healthcare program covers. OI rules are supplementary rules that MITS uses to process claims for cost avoidance.

The OI plan maintains the other carrier's list of covered services. When a recipient has an OI plan, MITS compares the services billed to the services covered by the OI plan. MITS bills the OI plan before Medicaid. If the OI plan covers the service, but the carrier did not make a payment, then MITS denies those services. If the OI carrier indicates that they do not cover the service, then MITS processes the claim under Medicaid.

Other Insurance Maintenance

You maintain OI plans in the **Benefit Administration** section of the **Reference** subsystem using the **Other Insurance** panel. From there you can perform various searches, additions, and updates to OI plans.

Review the areas of the Other Insurance maintenance panel in the examples.

Navigating Other Insurance

Ohio.gov | Medicaid Information Technology System

August 25, 2010 11:42 AM EDT

Home Claims Drug EDI Healthcek Financial Managed Care MAR Prior Authorization Provider Recipient **Reference** RetroDUR TPL Security

Tools Site

home diagnosis directive drg drug error disposition modifier procedure revenue related data **benefit administration** release

Benefit Administration Select area to add or modify below. Prefs Top Bot ? ↕

- Benefit Classification
- Copay
- Financial Payer
- Form Edits
- Global Restrictions
- Recipient Plan
- Other Insurance**
- Provider Contract
- Reimbursement Agreement
- Rule Catalog

save cancel

Other Insurance Plan

Other Insurance Plan

Search Results

Recipient Plan	Description	Effective Date	End Date	Inactive Date
EXC	Cancer	01/01/2000	12/31/2299	12/31/2299
EXD	Dental Services	01/01/2000	12/31/2299	12/31/2299
EXIP	Inpatient	01/01/2000	12/31/2299	12/31/2299
EXNH	Nursing Home	01/01/2000	12/31/2299	12/31/2299
EXPO	Physician Outpatient	01/01/2000	12/31/2299	12/31/2299
EXV	Vision	01/01/2000	12/31/2299	12/31/2299
OIC	CANCER	01/01/2000	12/31/2299	12/31/2299
OID	DENTAL	01/01/2000	12/31/2299	12/31/2299
OIIC	INPATIENT COVERAGE	01/01/2000	12/31/2299	12/31/2299
OINH	NURSING HOME	01/01/2000	12/31/2299	12/31/2299

1 2 Next >

-Other Insurance Plan- Type changes below.

OI Plan

Description

Long Description

Effective Date

End Date

Inactive Date

add Copy Plan

-Dependent Plan Data- The data below is for the row selected above.

-Excluded Plan Data- The data below is for the row selected above.

-Benefit Coverage-

To access the Other Insurance panel select **Reference**, **Benefit Administration**, and then **Other Insurance**.

Navigating Other Insurance

Other Insurance Plan Top Nav ? A ↕ X

OI Plan search clear

Search Results

Recipient Plan	Description	Effective Date	End Date	Inactive Date
EXC	Cancer	01/01/2000	12/31/2299	12/31/2299
EXD	Dental Services	01/01/2000	12/31/2299	12/31/2299
EXIP	Inpatient	01/01/2000	12/31/2299	12/31/2299
EXNH	Nursing Home	01/01/2000	12/31/2299	12/31/2299
EXPO	Physician Outpatient	01/01/2000	12/31/2299	12/31/2299
EXV	Vision	01/01/2000	12/31/2299	12/31/2299
OIC	CANCER	01/01/2000	12/31/2299	12/31/2299
OID	DENTAL	01/01/2000	12/31/2299	12/31/2299
OIIC	INPATIENT COVERAGE	01/01/2000	12/31/2299	12/31/2299
OINH	NURSING HOME	01/01/2000	12/31/2299	12/31/2299

1 2 Next >

-Other Insurance Plan- Type changes below.

OI Plan

Description

Long Description

Effective Date

End Date

Inactive Date

add Copy Plan

-Dependent Plan Data- The data below is for the row selected above.

-Excluded Plan Data- The data below is for the row selected above.

-Benefit Coverage-

There is an automatic search in MITS which displays all the current OI plans. You can either select from the list or do your own search.

Navigating Other Insurance

-Dependent Plan Data- The data below is for the row selected above.

*** No rows found ***

Select row above to update -or- click Add button below.

Dependent Plan

In this area of the panel, specify the dependent plan data for the other insurance plan.

Navigating Other Insurance

-Excluded Plan Data- The data below is for the row selected above.

*** No rows found ***

Select row above to update -or- click Add button below.

Excluded Plan **Managed Care Plan Exclusion**

In this area of the panel, specify the excluded plan data for the other insurance plan.

Navigating Other Insurance

-Benefit Coverage-

***Directive Version**

Type	Code	Description
Search: <input type="text" value="Procedure"/>	<input type="text"/>	<input type="text"/>

Active Rules
 All Rules

- Procedures
- Drugs
- Diagnoses
- Revenue Codes
- ICD-9 Procedures
- DRGs

In this area of the panel, specify the benefits covered by the other insurance plan.

Navigating Other Insurance	
Created By	Created On Config NA
<input type="button" value="View History"/>	Last saved via Directive Version
Eff/End Dates 01/01/2000 12/31/2299	Claims Submission Dates 01/01/2000 12/31/2299
Act/Inact Dates 09/09/2010 12/31/2299	Age 0 999999
Gender Both	Quantity 0 999999
OI Action	Medical Review No
Exception	
Special Program Code Editing	No
Place of Service Editing	No
Claim Type Editing	No
Recipient Plans Editing	No
Benefit Role Editing	No
Policy Type Indicator Editing	No
Provider Contracts Editing	No
Carrier Codes	
Diagnosis	
Provider Type/Specialty	
Modifier Editing	No
Occurrence Editing	No
Condition Editing	No
Type of Bill Editing	No
Organization Code Editing	No

In this pop-up, specify the benefit coverage rules for the other insurance plan.

Check Your Understanding

This activity contains questions to assess your understanding of key concepts in this topic. Review the topic if your score is below your standards.

Other Insurance (OI) identifies the types of third party health coverage, if any, for a recipient.

- True
- False

Before benefit coverage associated with an OI plan is assigned to the plan, which of the following actions must occur?

- You must manage the benefits and rules applied in processing claims.
- You must add the applicable benefit classification to MITS.
- You must determine the services for which a Medicaid recipient is eligible.
- You must define the pricing methodologies and adjustment factors.

OI rules are supplementary rules that MITS uses to process claims for cost avoidance.

- A. True
- B. False

When processing claims, which of the following does MITS bill first?

- A. Other insurance carrier
- B. Medicaid

Summary

In this topic you learned about the maintenance of OI plans.

Searching for OI Plans

What

In this topic you learn how to search for an Other Insurance (OI) plan.

Who

Configuration Analysts, Policy Analysts, or Claims Analysts perform this task.

When

You perform a search when researching any of the following:

- Policies
- Third party liability plans
- Claims

Relevance

If you perform this task improperly, claims may not be billed correctly.

Requirements

You **must** have the OI plan code if you want to search for a specific plan.

How To

Follow these steps from the MITS home page to search for an OI plan:

Step	Action
1	Click Reference .
2	Click Benefit Administration .
3	Click Other Insurance .

Step	Action						
4	Select the OI plan you want to view by following these steps: <table border="1" data-bbox="371 359 1375 621" style="margin-left: 40px;"> <thead> <tr> <th data-bbox="378 367 725 417">TO find the OI plan:</th> <th data-bbox="725 367 1369 417">THEN:</th> </tr> </thead> <tbody> <tr> <td data-bbox="378 417 725 531">Select an OI plan from the search results</td> <td data-bbox="725 417 1369 531"> a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view. </td> </tr> <tr> <td data-bbox="378 531 725 613">Search for a particular OI plan</td> <td data-bbox="725 531 1369 613"> a. Type a plan code in the OI Plan field. b. Click search. </td> </tr> </tbody> </table>	TO find the OI plan:	THEN:	Select an OI plan from the search results	a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.	Search for a particular OI plan	a. Type a plan code in the OI Plan field. b. Click search .
TO find the OI plan:	THEN:						
Select an OI plan from the search results	a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.						
Search for a particular OI plan	a. Type a plan code in the OI Plan field. b. Click search .						
5	Click the plus sign (+) to the left of Dependent Plan Data to view this information for the OI plan you selected.						
6	Click the plus sign (+) to the left of Excluded Plan Data to view this information for the OI plan you selected.						
7	Click the plus sign (+) to the left of Benefit Coverage to navigate through the reference data within the medical classification tree structure.						

Success

You have successfully completed this task when the OI plan information appears.

Practice

Practice searching for an OI plan using this information:

OI Plan: OIPO

When you complete the practice successfully, the information for the OI plan appears.

Summary

In this topic you learned how to search for an OI plan.

Adding an OI Plan

What

In this topic you learn how to add Other Insurance (OI) plans.

Who

A Configuration Analyst with appropriate security access performs this task.

When

You perform this task when the State of Ohio wants to add an OI plan.

Relevance

If you perform this task improperly, claims may be suspended, denied, or paid incorrectly.

Requirements

To perform this task, be aware of the following requirements:

- You **must** have an approved Customer Service Request (CSR) or directive requiring the addition of a new OI plan.
- You **must** have the appropriate security role and access to Reference and BPA information.

Guidelines

To perform this task, be aware of the following guidelines:

- You should have an extensive knowledge of how Medicaid claims are processed, the components of a claim, the state's policies, and the parts of MITS that directly impact how a claim processes.
- You should verify that the CSR or directive is approved.
- You should correspond with Claims **before** you add the OI plan.
- When choosing the five-character OI plan code, follow these guidelines:
 - OI plans that start with the letters OI help define coverage rules for a specific coverage code, and are used for cost avoidance. If the coverage rule denies a claim, you will need to add an exception to the OI plan.
 - OI plans that start with the letters EX are for exceptions, and approve claims for certain conditions.

How To

Follow these steps from the MITS home page to add an OI plan:

Step	Action
1	Click Reference .
2	Click Benefit Administration .
3	Click Other Insurance .
4	Click add .
5	Type a code in the OI Plan field. Note: Follow the guidelines of starting with OI for diagnosis and EX for exceptions.
6	Type a description in the Description field.
7	Type a description in the Long Description field. Note: Describe who is eligible and what types of services are provided.
8	As appropriate, update the defaults in the following fields: <ul style="list-style-type: none"> • Effective Date • End Date • Inactive Date
9	Click save .

Success

You have successfully completed this task when the **Save was Successful** confirmation message appears. The new OI plan also appears in the automatic search results.

Next Steps

You can add the following information to the new OI plan:

- Dependent plan data
- Excluded plan data
- Benefit coverage rules

Practice

Practice adding an OI plan by providing the following information of your choosing:

- **OI Plan:** An OI plan code
- **Description**
- **Long Description**
- **Effective Date**
- **End Date**
- **Inactive Date**

Record the OI plan code: _____.

When you complete the practice successfully, the **Save was Successful** confirmation message appears. Your new OI plan also appears in the automatic search results.

Summary

In this topic you learned how to how to add OI plans.

Adding or Updating OI Plan Data

What

In this topic you learn how to add or update Other Insurance (OI) plan data.

Who

A Configuration Analyst with appropriate security access performs this task.

When

You perform this task when you have data for a new OI plan or data changes for an existing OI plan.

Relevance

If you perform this task improperly, claims may be suspended, denied, or paid incorrectly.

Requirements

To perform this task, be aware of the following requirements:

- You **must** have an approved CSR or directive that contains the new information or changes for an OI plan.
- You **must** have the appropriate security role and access to Reference and BPA information.

Guidelines

To perform this task, be aware of the following guidelines:

- You should have an extensive knowledge of how Medicaid claims are processed, the components of a claim, the state's policies, and the parts of MITS that directly impact how a claim processes.
- You should verify that the CSR or directive is approved.

How To

Follow these steps from the MITS home page to add or update OI plan data:

Step	Action
1	Click Reference .
2	Click Benefit Administration .

Step	Action						
3	Click Other Insurance .						
4	Select the OI plan you want to update by following these steps: <table border="1" data-bbox="371 424 1375 684"> <thead> <tr> <th>TO find the OI plan:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Select an OI plan from the search results</td> <td>a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.</td> </tr> <tr> <td>Search for a particular OI plan</td> <td>a. Type a plan code in the OI Plan field. b. Click search.</td> </tr> </tbody> </table>	TO find the OI plan:	THEN:	Select an OI plan from the search results	a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.	Search for a particular OI plan	a. Type a plan code in the OI Plan field. b. Click search .
TO find the OI plan:	THEN:						
Select an OI plan from the search results	a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.						
Search for a particular OI plan	a. Type a plan code in the OI Plan field. b. Click search .						
5	Modify OI plan data by following these steps: <table border="1" data-bbox="371 789 1375 1297"> <thead> <tr> <th>TO:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Add or update dependent plan data</td> <td>a. Click the plus sign (+) to expand Dependent Plan Data. b. Click add. c. Click the Dependent Plan drop-down list. d. Select a dependent plan.</td> </tr> <tr> <td>Add or update excluded plan data</td> <td>a. Click the plus sign (+) to expand Excluded Plan Data. b. Click add. c. Click the Excluded Plan drop-down list. d. Select an excluded plan. e. Click the Managed Care Plan Exclusion drop-down list. f. Select Yes or No.</td> </tr> </tbody> </table>	TO:	THEN:	Add or update dependent plan data	a. Click the plus sign (+) to expand Dependent Plan Data . b. Click add . c. Click the Dependent Plan drop-down list. d. Select a dependent plan.	Add or update excluded plan data	a. Click the plus sign (+) to expand Excluded Plan Data . b. Click add . c. Click the Excluded Plan drop-down list. d. Select an excluded plan. e. Click the Managed Care Plan Exclusion drop-down list. f. Select Yes or No .
TO:	THEN:						
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Add or update excluded plan data	a. Click the plus sign (+) to expand Excluded Plan Data . b. Click add . c. Click the Excluded Plan drop-down list. d. Select an excluded plan. e. Click the Managed Care Plan Exclusion drop-down list. f. Select Yes or No .						
6	Click save .						

Success

You have successfully completed this task when the **Save was Successful** confirmation message appears. The new OI plan data you added or updated also appears in the appropriate areas on the panel.

Practice

Practice 1

Practice adding dependent plan data using this information:

- **OI Plan:** Use the same code you created in the previous practice
- **Dependent Plan:** Your choice

Practice 2

Practice adding excluded plan data using this information:

- **Excluded Plan:** Your choice
- **Managed Care Plan Exclusion:** Your choice of Yes or No

When you complete the practice successfully, the **Save was Successful** confirmation message appears. The information you added for the OI plan also appears.

Summary

In this topic you learned how to add or update OI plan data.

Adding or Updating Benefit Coverage Rules

What

In this topic you learn how to add or update benefit coverage rules for an Other Insurance (OI) plan.

Who

A Configuration Analyst with appropriate security access performs this task.

When

You perform this task when you have benefit coverage rules for a new OI plan or rule changes for an existing OI plan.

Relevance

If you perform this task improperly, claims may be suspended, denied, or paid incorrectly.

Requirements

To perform this task, be aware of the following requirements:

- You **must** have an approved CSR or directive that contains the new or changed benefit coverage rules for an OI plan.
- You **must** have the appropriate security role and access to Reference and BPA information.

Guidelines

To perform this task, be aware of the following guidelines:

- You should have an extensive knowledge of how Medicaid claims are processed, the components of a claim, the state's policies, and the parts of MITS that directly impact how a claim processes.
- You should verify that the CSR or directive is approved.

How To

Follow these steps from the MITS home page to add or update benefit coverage rules for an OI plan:

Step	Action
1	Click Reference .

Step	Action						
2	Click Benefit Administration .						
3	Click Other Insurance .						
4	Select the OI plan you want to update by following these steps: <table border="1" data-bbox="371 489 1375 747"> <thead> <tr> <th>TO find the OI plan:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Select an OI plan from the search results</td> <td>a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.</td> </tr> <tr> <td>Search for a particular OI plan</td> <td>a. Type a plan code in the OI Plan field. b. Click search.</td> </tr> </tbody> </table>	TO find the OI plan:	THEN:	Select an OI plan from the search results	a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.	Search for a particular OI plan	a. Type a plan code in the OI Plan field. b. Click search .
TO find the OI plan:	THEN:						
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Search for a particular OI plan	a. Type a plan code in the OI Plan field. b. Click search .						
5	Click the plus sign (+) to expand Benefit Coverage .						
6	Select a directive version from the Directive Version drop-down list.						
7	Ensure that the Active Rules radio button is selected.						
8	Navigate to the level where you want to add or update the Benefit Coverage by expanding the plus signs (+) in the tree classification structure until you reach the required rule or set of rules you want to add.						
9	Right-click the category level in which the rule will reside.						
10	Select Add rule .						
11	Select an action from the OI Action drop-down list in the pop-up window.						
12	Make all the appropriate selections for the benefit coverage rule in the pop-up window.						
13	Click the X at the top of the pop-up window to close the window. Note: If you receive any error messages you must correct the errors before you can close the pop-up window.						
14	Click save .						
15	Click OK in the Step 1: State panel in the verification process dialog box. Note: Step 1 identifies conflicting rules. If you have conflicting rules, MITS is unable to process the claim properly. The system will not save the changes until you remove or correct any ambiguity. Click Cancel to return to the previous panel to make the appropriate changes to the rules. Refer to the Summary popup window to determine how to correct the conflict.						

Step	Action
16	Click the appropriate radio button in the Step 2: Simplifications panel in the verification process dialog box. Note: Step 2 checks for ways to make the rules work together and automatically combines rules to simplify the data and rule.
17	Click OK .
18	Click OK again in the Step 2: Simplifications panel in the verification process dialog box.
19	Click OK in the Step 3: Directive Verification panel in the verification process dialog box. Note: Step 3 validates the chosen directive and version.

Success

You have successfully completed this task when the **Save was Successful** confirmation message appears.

Practice

Practice adding benefit coverage rules using this information:

- **OI Plan:** Use the same code you created in the previous practice
- **Directive Version:** Your choice
- **Type:** Your choice
- **OI Action:** Your choice

When you complete the practice successfully, the **Save was Successful** confirmation message appears.

Summary

In this topic you learned how to add or update benefit coverage rules for an OI plan.

Copying an OI Plan

What

In this topic you learn how to copy an Other Insurance (OI) plan.

Who

A Configuration Analyst with appropriate security access performs this task.

When

You perform this task when you need to copy an existing OI plan.

Relevance

If you perform this task improperly, claims may be suspended, denied, or paid incorrectly.

Requirements

To perform this task, be aware of the following requirements:

- You **must** have an approved CSR or directive that contains the new name and any additional information for the new OI plan.
- You **must** have the appropriate security role and access to Reference and BPA information.

Guidelines

To perform this task, be aware of the following guidelines:

- You should have an extensive knowledge of how Medicaid claims are processed, the components of a claim, the state's policies, and the parts of MITS that directly impact how a claim processes.
- You should verify that the CSR or directive is approved.

How To

Follow these steps from the MITS home page to copy an OI plan:

Step	Action
1	Click Reference .
2	Click Benefit Administration .

Step	Action						
3	Click Other Insurance .						
4	Select the OI plan you want to copy by following these steps: <table border="1" data-bbox="371 426 1377 684"> <thead> <tr> <th>TO find the OI plan:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Select an OI plan from the search results</td> <td>a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.</td> </tr> <tr> <td>Search for a particular OI plan</td> <td>a. Type a plan code in the OI Plan field. b. Click search.</td> </tr> </tbody> </table>	TO find the OI plan:	THEN:	Select an OI plan from the search results	a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.	Search for a particular OI plan	a. Type a plan code in the OI Plan field. b. Click search .
TO find the OI plan:	THEN:						
Select an OI plan from the search results	a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.						
Search for a particular OI plan	a. Type a plan code in the OI Plan field. b. Click search .						
5	Click Copy Plan .						
6	Click OK in the confirmation box to copy all the rules for this plan into the new plan.						
7	Type a code for the new plan in the OI Plan field. Note: Follow the guidelines of starting with OI for diagnosis and EX for exceptions.						
8	Type a description in the Description field.						
9	Type a description in the Long Description field. Note: Describe who is eligible and what types of services are provided.						
10	As appropriate, update the defaults in the following fields: <ul style="list-style-type: none"> • Effective Date • End Date • Inactive Date 						
11	<u>If not already expanded</u> , click the plus sign (+) to expand Benefit Coverage .						
12	Select a directive version from the Directive Version drop-down list.						
13	Click save to complete the plan copy.						
14	Click OK in the message box notifying you that the system is determining the number of rules in the plan.						
15	Click OK in the message box notifying you how many rules are in the plan that will be copied to the new plan.						

Success

You have successfully completed this task when the **Save was Successful** confirmation message appears. The new OI plan also appears in the automatic search results.

Practice

Practice copying an OI plan by providing the following information of your choosing:

- **OI Plan:** An OI plan code
- **Description**
- **Long Description**
- **Effective Date**
- **End Date**
- **Inactive Date**
- **Directive Version**

Record the OI plan code: _____.

When you complete the practice successfully, the **Save was Successful** confirmation message appears. Your new OI plan also appears in the automatic search results.

Summary

In this topic you learned how to copy an OI plan.

Ending an OI Plan

What

In this topic you learn how to end an Other Insurance (OI) plan.

Who

A Configuration Analyst with appropriate security access performs this task.

When

You perform this task when you need to make an OI plan invalid for use in claims processing by setting an end date.

Relevance

If you perform this task improperly, claims may be suspended, denied, or paid incorrectly.

Requirements

To perform this task, be aware of the following requirements:

- You **must** have an approved Customer Service Request (CSR) or directive to end an OI plan.
- You **must** have the appropriate security role and access to Reference and BPA information.

Guidelines

To perform this task, be aware of the following guidelines:

- You should have an extensive knowledge of how Medicaid claims are processed, the components of a claim, the state's policies, and the parts of MITS that directly impact how a claim processes.
- You should verify that the CSR or directive is approved.

How To

Follow these steps from the MITS home page to end an OI plan:

Step	Action
1	Click Reference .
2	Click Benefit Administration .

Step	Action						
3	Click Other Insurance .						
4	Select the OI plan you want to end by following these steps: <table border="1" data-bbox="371 426 1377 688"> <thead> <tr> <th>TO:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Select an OI plan from the search results</td> <td>a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.</td> </tr> <tr> <td>Search for a particular OI plan</td> <td>a. Type a plan code in the OI Plan field. b. Click search.</td> </tr> </tbody> </table>	TO:	THEN:	Select an OI plan from the search results	a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.	Search for a particular OI plan	a. Type a plan code in the OI Plan field. b. Click search .
TO:	THEN:						
Select an OI plan from the search results	a. Scroll through the search results to locate the OI plan. b. Click the row for the plan you want to view.						
Search for a particular OI plan	a. Type a plan code in the OI Plan field. b. Click search .						
5	Modify the end date in the End Date field.						
6	Click save .						

Success

You have successfully completed this task when the **Save was Successful** confirmation message appears. The new end date for the OI plan also appears in the automatic search results.

Practice

Practice ending an OI plan using this information:

- **OI Plan:** Use the same code you created in the Adding an OI Plan practice or the Copying an OI plan practice
- **End Date:** Your choice

When you complete the practice successfully, the **Save was Successful** confirmation message appears. The new end date for the OI plan also appears.

Summary

In this topic you learned how to end an OI plan.

Review

Objectives

In this course you learned how to:

- Search for OI plans
- Add an OI plan
- Add or update OI plan data
- Add or update benefit coverage rules
- Copy an OI plan
- End an OI plan