



Medicaid Information Technology System

State & Local Government Solutions

Medicaid Information Technology System (MITS)

Rule Catalog Usage Participant Guide

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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 the Rule Catalog in the Ohio MITS system.

Objective(s)

After completing this course, you should be able to:

- Search and view rules in Rule Catalog
- Print and export rules from Rule Catalog

Agenda

| Topic | Time |
|--|------------|
| Welcome and Introductions | 15 minutes |
| Course Overview | 15 minutes |
| Introduction to Rule Catalog | 30 minutes |
| Searching and Viewing Rules in Rule Catalog | 45 minutes |
| Printing and Exporting Rules in Rule Catalog | 45 minutes |

Introduction to Rule Catalog

Overview

The Benefit Plan Administration (BPA) subsystem uses business rules to enforce state policy and thereby allows states to quickly and easily manage healthcare packages through MITS.

These business rules are entered in MITS by designated configuration analysts on the following components of the BPA subsystem:

- Recipient Plans
- Provider Contract
- Reimbursement Agreements
- Global Restrictions

The Rule Catalog is a search engine for finding these rules. The Rule Catalog search panel enables you to search all rules based on criteria you select.

The search criteria can include one or more BPA components (Recipient Plans, Provider Contracts, Reimbursement Agreements, and/or Global Restrictions) for either a group-level search of benefits or down to an individual benefit node (like a single procedure code, diagnosis code, DRG, etc). Rule Catalog functionality includes selecting a rule and viewing all associated decision variables for the rule to assist in identifying how deeply a change impacts the system.

Search Options

The search panel is the entry point of the Rule Catalog. You select the criteria to restrict the catalog of rules to a manageable set of rules for review.

The Rule Catalog offers two kinds of search parameters: Simple search or Advanced search.

| Simple Search | Advanced Search |
|---|---|
| <p>Simple search is the default search option. It offers basic criteria for searching rules, such as:</p> <ul style="list-style-type: none"> • Benefit type (procedure, diagnosis, ICD-9 procedure code, DRG, NDC/Drug, or Revenue Code) • Provider contract • Recipient plan • Rule effective date range • Clerk ID | <p>Advanced search offers everything in simple search, plus customizable data elements, such as:</p> <ul style="list-style-type: none"> • Rule number • Edit number • Pricing indicator • Adjustment factor • Diagnosis search |

Search Results

The Search Results panel has several features.

The screenshot shows the Search Results panel with a Microsoft Excel spreadsheet overlaid. The spreadsheet displays the search results in a tabular format. A red arrow points to the 'Save As...' button at the bottom right of the panel, which is circled in red.

| Rule Number | Rule Type | Action | Action Value | Comparison Criteria | Comparison | Comparison Value |
|-------------|-------------------------------|---------------------------|--------------|------------------------------|------------|------------------|
| 85494 | Provider Contract - Procedure | Current Provider Contract | EQ | CBCLT-Transportation | | |
| | | Eff/End Dates | BW | 10/01/2003 - 12/31/2299 | | |
| | | Modifier | SET | (U9) 1:1 | | |
| | | Act/Inact Dates | BW | 01/25/2010 - 12/31/2299 | | |
| | | Procedure | EQ | T1015 - CLINIC SERVICE | | |
| 85523 | Provider Contract - Procedure | Current Provider Contract | EQ | CBCLT-Transportation | | |
| | | Eff/End Dates | BW | 07/01/2003 - 12/31/2299 | | |
| | | Act/Inact Dates | BW | 01/25/2010 - 12/31/2299 | | |
| | | Procedure | EQ | T2003 - N-ET; ENCOUNTER/TRIP | | |

Save As enables you to export the result set of the search. You can open or save your results in a spreadsheet (.csv) file.

The screenshot shows the Search Results panel with a 'Print Friendly' pop-up window overlaid. The pop-up window displays the search results in a print-friendly format. A red arrow points to the 'Print Friendly' button at the bottom right of the panel, which is circled in red.

Rule Catalog Search Results
7/1/2010 2:46:28 PM

Selection Criteria

Code Type : PROC
CBCLT

Include Provider Contract:

| Rule Type | Comparison | OP | Comparison Value | Action | Action Value |
|---|---------------------------|-----|------------------------------|--------|--------------|
| Rule 85494 Provider Contract - Procedure | Current Provider Contract | EQ | CBCLT-Transportation | | |
| | Eff/End Dates | BW | 10/01/2003 - 12/31/2299 | | |
| | Modifier | SET | (U9) 1:1 | | |
| | Act/Inact Dates | BW | 01/25/2010 - 12/31/2299 | | |
| | Procedure | EQ | T1015 - CLINIC SERVICE | | |
| Rule 85523 Provider Contract - Procedure | Current Provider Contract | EQ | CBCLT-Transportation | | |
| | Eff/End Dates | BW | 07/01/2003 - 12/31/2299 | | |
| | Act/Inact Dates | BW | 01/25/2010 - 12/31/2299 | | |
| | Procedure | EQ | T2003 - N-ET; ENCOUNTER/TRIP | | |

End of Report

Print Friendly displays the result set of the search in a pop-up window, where you use your browser's Print function to print to hard copy for further review. The print-friendly display posts all returned rules in a single report.

The screenshot displays the Rule Catalog application interface. A search results table is visible at the bottom, with the first row highlighted. A red circle highlights the rule number '85494' in the 'Rule Number' column. A red arrow points from this circle to a pop-up window titled 'Rule History List - Microsoft Internet Explorer provided by Hewlett-Packard'. The pop-up window shows the 'Rule 85494 History' details, including End Date, Edited By, Directive, Ver, Rule Description, Current Provider, Contract, Eff/End Dates, Modifier, Act/Inact Dates, and Procedure.

| Rule Number | Rule Type | Action | Action Value | Comparison Criteria | Comparison | Comparison Value |
|-------------|-------------------------------|--------|--------------|---------------------------|------------|------------------------------|
| 85494 | Provider Contract - Procedure | | | Current Provider Contract | EQ | CBCLT-Transportation |
| | | | | Eff/End Dates | BE | 10/01/2003 - 12/31/2299 |
| | | | | Modifier | SET | (U9) 1:1 |
| | | | | Act/Inact Dates | SW | 01/25/2010 - 12/31/2299 |
| | | | | Procedure | EQ | T1015 - CLINIC SERVICE |
| 85523 | Provider Contract - Procedure | | | Current Provider Contract | EQ | CBCLT-Transportation |
| | | | | Eff/End Dates | SW | 07/01/2003 - 12/31/2299 |
| | | | | Act/Inact Dates | SW | 01/25/2010 - 12/31/2299 |
| | | | | Procedure | EQ | T2003 - N-ET; ENCOUNTER/TRIP |

When you click on the Rule Number in the Search Results panel, you can view the rule history, if it exists, for the rule(s) listed in the results.

Rule Catalog and OHP Policy

It is important to point out that the Rule Catalog exists mainly to assist configuration and policy analysts for policy research and rule comparison.

For example, a configuration analyst could receive a change order and want to run a report that shows what rules currently exist in order to analyze and compare them to the requirements of the change order. It may even generate a need to reevaluate existing rules resulting in modifications to avoid conflicts and ambiguity with the new rule.

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.

What two options are available on the search results panel when using the Rule Catalog?

- A. Delete
- B. Save As
- C. Add
- D. Print Friendly

The Rule Catalog enables you to view all associated decision variables for a rule to assist in identifying how deeply a change impacts the system.

- A. True
- B. False

Which of the following is the primary purpose of the Rule Catalog?

- A. Worklist
- B. Letter generator
- C. Search engine

Summary

In this topic, you learned about the purpose of the Rule Catalog, and different options available for searching and viewing results.

Searching and Viewing Rules in Rule Catalog

Overview

What

In this topic, you learn how to search and view rules in the Rule Catalog.

Who

Provider relations analysts, medical policy analysts, configuration analysts and other OHP staff with proper security perform this task.

When

You might perform this task in order to view the current codes and policies within the BPA subsystem related to the requirements of a change order, or to research suspended or denied claims.

Relevance

You can search the rule catalog to verify the appropriate rules exist so that claims are paid correctly.

The Rule Catalog is a search engine. It enables a user to view rules with specified search criteria ranging from one or more BPA components (recipient plans, provider contracts, reimbursement agreements, etc) for either a group level search of benefits or down to an individual benefit node (like a single procedure code, diagnosis code, Diagnosis Related Group (DRG) code, etc). The Rule Catalog offers two kinds of search parameters: **Simple** search or **Advanced** search.

How To

Follow these steps from the MITS home page to search and view rules in the Rule Catalog:

| Step | Action | | | | | | |
|----------------------------|--|-----|-------|-------------------------|--|----------------------------|--|
| 1 | Point to Reference and click Benefit Administration . | | | | | | |
| 2 | Click Rule Catalog . | | | | | | |
| 3 | <p>Search the Rule Catalog by following these steps:</p> <table border="1"> <thead> <tr> <th>TO:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Perform a simple search</td> <td> <ol style="list-style-type: none"> 1) Select a Benefit Type. 2) Select one of the following checkboxes: <ul style="list-style-type: none"> • Provider Contract • Reimbursement • Recipient Plan • Global Restrictions • Copay • By Clerk ID 3) Enter additional search criteria using check boxes, drop-down menus, search links and free-form text. <p>Note: If you select By Clerk ID, you must enter an ID in the field.</p> </td> </tr> <tr> <td>Perform an advanced search</td> <td> <ol style="list-style-type: none"> 1) Click adv search. 2) Select a Benefit Type. 3) Enter information in the Rule Number or Edit Number field. <p>OR</p> Select one of the following checkboxes: <ul style="list-style-type: none"> • Provider Contract • Reimbursement • Recipient Plan • Global Restrictions • Copay • By Clerk ID 4) Enter additional search criteria using check boxes, drop-down menus, search links and free-form text. <p>Notes:</p> <ul style="list-style-type: none"> • When searching by Pricing Indicator, Rate Type, or Adjustment Factor, you must select the Reimbursement Rule checkbox. • If you select the Active On Date radio button, you must enter a date in the field. </td> </tr> </tbody> </table> | TO: | THEN: | Perform a simple search | <ol style="list-style-type: none"> 1) Select a Benefit Type. 2) Select one of the following checkboxes: <ul style="list-style-type: none"> • Provider Contract • Reimbursement • Recipient Plan • Global Restrictions • Copay • By Clerk ID 3) Enter additional search criteria using check boxes, drop-down menus, search links and free-form text. <p>Note: If you select By Clerk ID, you must enter an ID in the field.</p> | Perform an advanced search | <ol style="list-style-type: none"> 1) Click adv search. 2) Select a Benefit Type. 3) Enter information in the Rule Number or Edit Number field. <p>OR</p> Select one of the following checkboxes: <ul style="list-style-type: none"> • Provider Contract • Reimbursement • Recipient Plan • Global Restrictions • Copay • By Clerk ID 4) Enter additional search criteria using check boxes, drop-down menus, search links and free-form text. <p>Notes:</p> <ul style="list-style-type: none"> • When searching by Pricing Indicator, Rate Type, or Adjustment Factor, you must select the Reimbursement Rule checkbox. • If you select the Active On Date radio button, you must enter a date in the field. |
| TO: | THEN: | | | | | | |
| Perform a simple search | <ol style="list-style-type: none"> 1) Select a Benefit Type. 2) Select one of the following checkboxes: <ul style="list-style-type: none"> • Provider Contract • Reimbursement • Recipient Plan • Global Restrictions • Copay • By Clerk ID 3) Enter additional search criteria using check boxes, drop-down menus, search links and free-form text. <p>Note: If you select By Clerk ID, you must enter an ID in the field.</p> | | | | | | |
| Perform an advanced search | <ol style="list-style-type: none"> 1) Click adv search. 2) Select a Benefit Type. 3) Enter information in the Rule Number or Edit Number field. <p>OR</p> Select one of the following checkboxes: <ul style="list-style-type: none"> • Provider Contract • Reimbursement • Recipient Plan • Global Restrictions • Copay • By Clerk ID 4) Enter additional search criteria using check boxes, drop-down menus, search links and free-form text. <p>Notes:</p> <ul style="list-style-type: none"> • When searching by Pricing Indicator, Rate Type, or Adjustment Factor, you must select the Reimbursement Rule checkbox. • If you select the Active On Date radio button, you must enter a date in the field. | | | | | | |
| 4 | Click search . | | | | | | |

Success

You have successfully completed this task when the correct rule(s) display.

Practice

Search for rules in the Rule Catalog using this information:

- Benefit Type: Procedure
- Copay checkbox

When you are done, you should see four pages of Search Results with Rule Numbers 88852, 88853, 88854 displayed on the first page.

Printing and Exporting Rules in Rule Catalog

Overview

What

In this topic, you learn how to print and export rules in the Rule Catalog.

Who

Provider relations analysts, medical policy analysts, configuration analysts and other OHP staff with proper security perform this task.

When

A configuration analyst performs this task after receiving a change order in order to view the current codes and policies within the BPA subsystem related to the requirements of the change order.

Relevance

Using two different functions in the search results panel, you can export or print rules from the rule catalog to verify the appropriate rules exist so that claims are paid correctly.

- **Save As** - Allows the result sets of the search to be exported in a single file for further review.
- **Print Friendly** - Allows the result sets of the search to be printed to hard copy for further review. The print friendly display posts all returned rules in a single report that you can print.

Requirements

You need specific search criteria to access a rule from the Rule Catalog. The search criteria can include one or more of the following BPA components for either a group level search of benefits or down to an individual benefit node (like a single procedure code, diagnosis code, DRG, etc):

- Recipient plans
- Provider contracts
- Reimbursement agreements
- Global restrictions

Guidelines

Review current codes and policies within the BPA subsystem prior to adding or modifying any specific policy.

How To

Follow these steps from the MITS home page to print or export search results from the Rule Catalog:

| Step | Action | | | | | | |
|-----------------------|---|-----|-------|-----------------------|--|----------------------|--|
| 1 | Point to Reference and click Benefit Administration . | | | | | | |
| 2 | Click Rule Catalog . | | | | | | |
| 3 | Enter the desired search criteria for either a simple search or an advanced search. Search options include check boxes, drop-down lists, search links, and free-form text. | | | | | | |
| 4 | Click search . | | | | | | |
| 5 | Print or export by following these steps: <table border="1" data-bbox="371 1079 1375 1486"> <thead> <tr> <th>TO:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Export search results</td> <td> a. In the search results panel, click Save As. b. In the File Download pop-up window, you have two options: <ul style="list-style-type: none"> Click Open to open your results in a spreadsheet. Click Save to save your results to a spreadsheet (*.csv) file. </td> </tr> <tr> <td>Print search results</td> <td> a. Click Print Friendly in the search results panel. b. Use your browser's Print function to print the results in the pop-up window that displays. </td> </tr> </tbody> </table> | TO: | THEN: | Export search results | a. In the search results panel, click Save As . b. In the File Download pop-up window, you have two options: <ul style="list-style-type: none"> Click Open to open your results in a spreadsheet. Click Save to save your results to a spreadsheet (*.csv) file. | Print search results | a. Click Print Friendly in the search results panel. b. Use your browser's Print function to print the results in the pop-up window that displays. |
| TO: | THEN: | | | | | | |
| Export search results | a. In the search results panel, click Save As . b. In the File Download pop-up window, you have two options: <ul style="list-style-type: none"> Click Open to open your results in a spreadsheet. Click Save to save your results to a spreadsheet (*.csv) file. | | | | | | |
| Print search results | a. Click Print Friendly in the search results panel. b. Use your browser's Print function to print the results in the pop-up window that displays. | | | | | | |

Success

You have successfully completed this task when the correct rule(s) display, print, or export to a spreadsheet.

Practice

Search for rules in the Rule Catalog using this information:

- Benefit Type: Procedure
- Copay checkbox

When you are done, you should see four pages of Search Results with Rule Numbers 88852, 88853, 88854 displayed on the first page.

Click Save As and Open to view the search results in a spreadsheet file. Save and/or close the spreadsheet window to return to MITS.

Click Print Friendly to view a pop-up window with all results displayed. You can resize the window as needed. From here, you could print this information using File/Print, but we won't print during class time.

Review

Objectives

In this course, you learned how to:

- Search and view rules in the Rule Catalog
- Export and print rules in the Rule Catalog