

Health Management System: Entering Medicaid Insurance Information

User Guide

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Key features about this user guide:

This user guide addresses how to enter Medicaid Insurance information in the Health Management System.

Wide outside margins are provided for taking notes. Margins may also contain a relevant **TIP** about a task discussed on that page.

At the end of each section, a space is available for you to enter your local notes. You can enter your notes electronically or write them in a printed copy. Use this section to reference internal operating procedures or information unique to your CHD that would better explain how to use a particular feature or function. If you choose to use this section, please inform CHD staff to reference this section.

Bookmarks, along with page numbers, are provided for you to quickly reference another section of text within the document. Press [Ctrl] then click the hyperlink to go to the bookmarked text.

“Steps to” gives you step-by-step instructions to accomplish a task or function within HMS. Short sentences using verbs and objects are used in the steps. Asterisk (*) appearing at the left of the step indicate the step is optional and not required to complete the task.

Standard language is used to perform a task.

- Click button; e.g., Click Search.
- Press a key or key combination is shown in square brackets; e.g., Press [Enter] or Press [Ctrl+Alt+Delete].

The result of the action may appear after a step. Often a step may be done more than one way. Options follow the text “Do one of the following:” so you can choose the best way for you.

A **NOTE** supplies additional information pertinent to a particular step or action.

A **TIP** gives a shortcut or additional information referring to a task or step on that page and appears in the outside margin of the page.

Supplemental information or examples may be included in the Appendixes.

Getting Help

Please let us know how we can make our training materials more helpful to you. Email your questions, suggestions, or HMS training needs to dlhmstrainingteam@flhealth.gov. You can also email us if you need help with HMS.



Section 1: General Information

Introduction

Entry of Medicaid insurance information into the Health Management System (HMS) is required for all clients that have this insurance type.

This user guide explains how to enter this information.

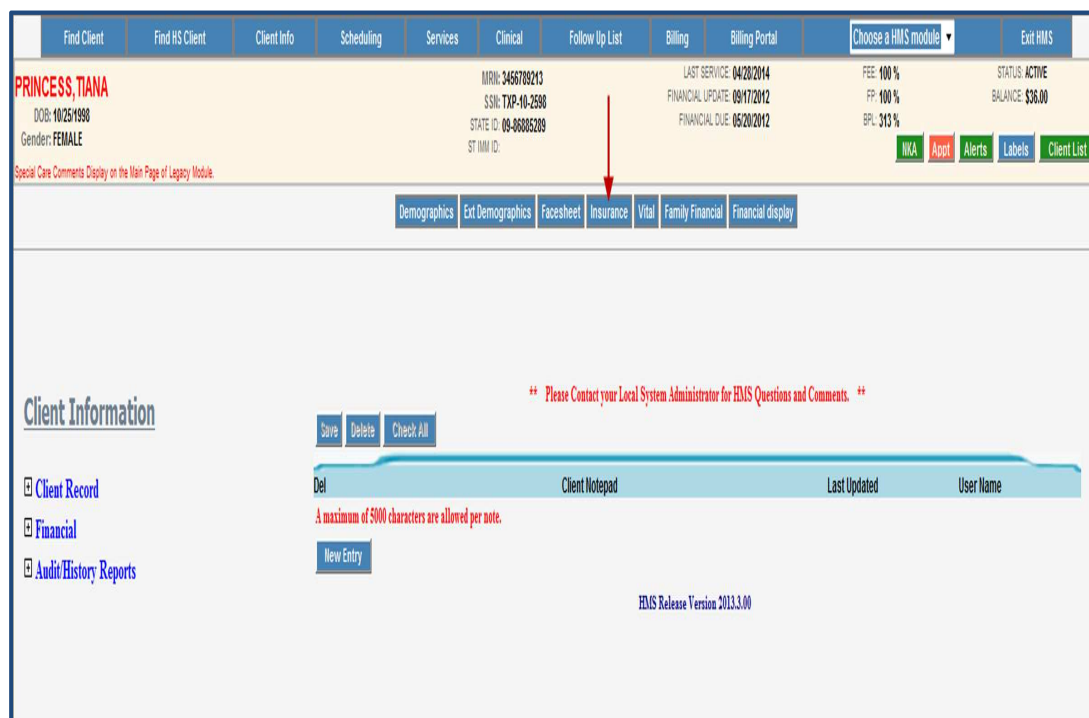
IN THIS GUIDE

- **Accessing the Update Ins Co/ Alt Payor Screen**
- **Exploring the Update Ins Co/ Alt Payor Screen**
- **Exploring the Medicaid Insurance Data Entry Fields**
- **Accessing the Medicaid Insurance Data Entry Fields**
- **Exploring the Medicaid Insurance Data Entry Fields**
- **Updating and Adding Medicaid Insurance Information**

① Accessing the Update Ins Co/Alt Payor Screen

To enter or update Medicaid insurance information for a client, access the **Update Ins Co/Alt Payor** screen.

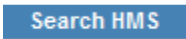
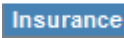
Tip: The **Update Ins Co/Alt Payor** screen displays automatically after selecting a client from the **Search HMS for Client** page.



Client Information Screen




Steps to Access the Update Ins Co/Alt Payor Screen


1. Enter Client search criteria.
2. Click **Search HMS.** 
3. Select a client.
4. Click **Insurance.** 

① Exploring the Update Ins Co/Alt Payor Screen

The **Update Ins Co/Alt Payor** screen is where you enter Medicaid insurance information for clients. The insurance options include First, Second, Medicaid and Other.

Cancel Page


Update Ins Co/Alt Payor


Save Page

PRINCESS, TIANA DOB: 10/25/1998 MRN: 3456789213 HKA

Print List

Highlight and click to choose correct entry

DEL	Ins Type	Number	Pend Status	Cvg Start	Cvg End	Exp Date	Ins Co/Alt Payor	CRA/Sub CRA Number
	First							
	Second							
	Medicaid							
	Other	123123123123		09/01/2012			LIBERTY DENTAL	
					Has Insurance	Insurance Pending	NO Insurance	

Update Insurance History
Suggest Eligibility

Update Ins Co/Alt Payor Screen

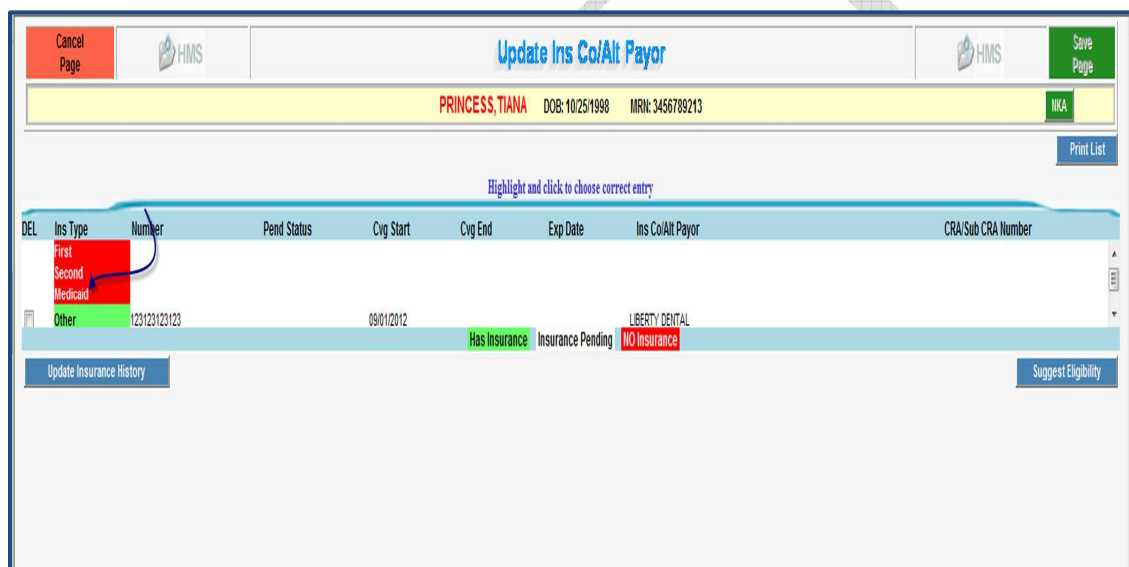
 The table below describes the Update Ins Co/Alt Payor screen content:

Field/Button	Description
DEL	Checkbox to delete the insurance information.
Ins Type	Insurance Type options.
Number	Insurance number associated with the policy holder.
Pend Status	The status of the client's application with an insurance agency.
Cvg. Start	Date the insurance coverage began.
Cvg. End	Date the insurance coverage ends.
Exp. Date	The date the application to the insurance company expires.
Ins Co/Alt Payor	Insurance Company or Alternate Payor Name.
CRA/ Sub CRA Number	Contract Number.
First	Primary Insurance (includes Medicare).
Second	Secondary Insurance (includes Medicare).
Medicaid	Medicaid Insurance.
Other	Other insurance after First and Second.
Insurance Pending	First, Second, Medicaid or Other insurance shaded white if the client's insurance status is pending.

No Insurance	First, Second, Medicaid or Other insurance is shaded red if the client has no insurance information documented for that insurance type.
Suggest Eligibility	Displays the program(s) a client may be eligible for based on information documented in their demographic information.
Update Insurance History	Displays previous insurance information.

Accessing the Medicaid Insurance Data Entry Fields

The Medicaid data entry screen is accessible from the Update Ins Co/Alt Payor screen.



Update Ins Co/Alt Payor Screen



Step to Access the Medicaid Insurance Data Entry Page

- Click **Medicaid.** 

Exploring the Medicaid Insurance Data Entry Fields

The Medicaid data entry includes 9 fields and one comment box. Specific fields are required based on the selection of other fields. Please refer to the table below.

Cancel Page

HMS

Update Ins Co/Alt Payor

HMS

Save Page

PRINCESS, TIANA

DOB: 10/25/1998

MRN: 3456789213

NKA

Print List

Highlight and click to choose correct entry

DEL	Ins Type	Number	Pend Status	Cvg Start	Cvg End	Exp Date	Ins Co/Alt Payor	CRA/Sub CRA Number
	First							
	Second							
	Medicaid							
	Other	123123123123		09/01/2012	Has Insurance	Insurance Pending	LIBERTY DENTAL	

Update Insurance History

Suggest Eligibility

Print

Medicaid

Medicaid Number *

Eligibility Period Start *

App. Pending Status :

Medicaid Type :

Update Comments :

Medipass Ind :

End :

App. Expiration Date :

HMO Ind :

Update Ins Co/Alt Payor - Medicaid

 The table below describes the Medicaid data entry fields:

Field/Button	Description
Medicaid Number	Required. 10 digit number assigned to the client by Medicaid.
Medipass Ind	Indicate if the Medicaid type is Medipass Ind. The HMO Ind checkbox disables when this box is selected. The Authorization button displays when this box is selected, but is not required.
HMO Ind	Checkbox to indicate the Medicaid type is an HMO. The Medipass Ind checkbox is disabled when this box is selected. The Authorization button displays when this box is selected, but is not required.
Eligibility Period Start	Required. Medicaid Eligibility start date. Date must be prior to the earliest service date.
End	Medicaid Eligibility end date. NOTE: Date is required for Medicaid.
App. Pending Status	Status of Medicaid application. Options include: App. Filed, App. Denied, App. Expired. NOTE: Eligibility Period Start is not required when this field is populated.
App. Expiration Date	Medicaid application expiration date. NOTE: Date is required if App. Pending Status field is populated.
Medicaid Type	Listing of Medicaid types from FIMMIS.
Update Comments	Required if completing a correction to the insurance information.



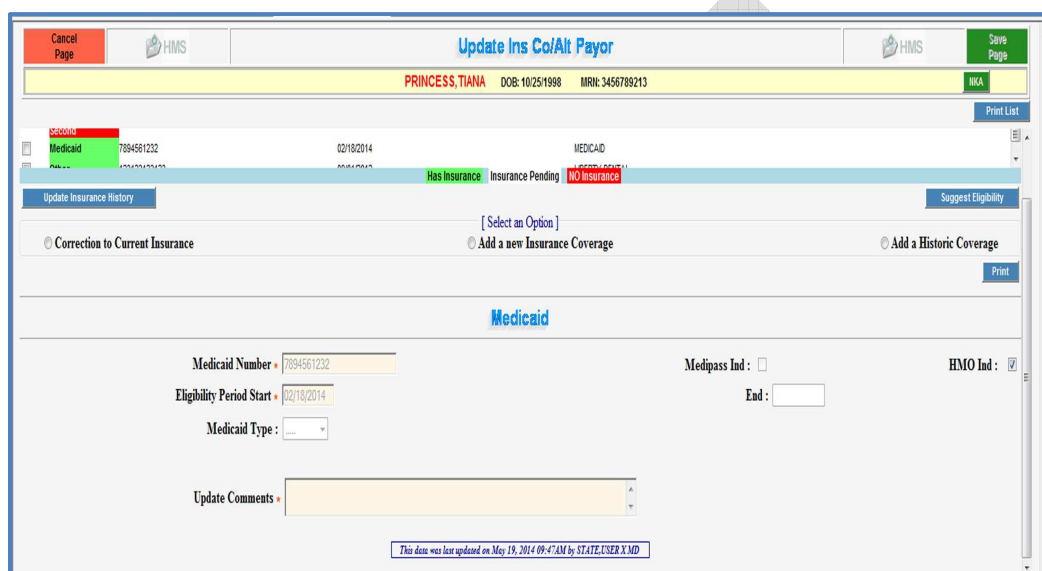
Steps to Enter Medicaid Insurance Information

1. Enter Applicable fields based on client's insurance information.
2. Click **Save Page.**

Save Page

Updating or Adding Medicaid Insurance

Once Medicaid information has been entered for a client, you have the ability to correct the current insurance information, add new insurance information or add historic coverage.



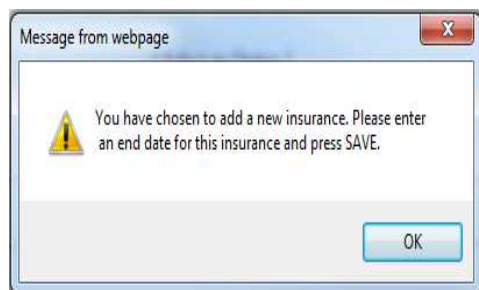
Update Ins Co/Alt Payor Screen – Correction, Add or Historic

Correction to Current Insurance

This option allows you to correct or update the current Medicaid insurance information. The **Update Comments** field will be required.

Add a new Insurance Coverage

This option allows you to add new Medicaid insurance information for the client. This option is only available if existing Medicaid information has been documented.

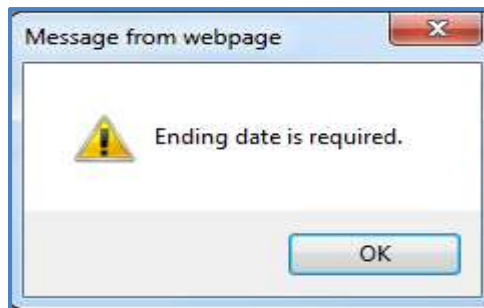


NOTE: The current Medicaid information must have an end date. You will receive a system message if an attempt to enter new Medicaid coverage without an end on the existing coverage.

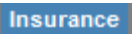

Add a Historic Coverage

This option allows you to add historical Medicaid information for the client. This option is only available if existing Medicaid information has been documented.

NOTE: Historic Medicaid information must include an end date. You will receive a system message if an attempt to enter historic information is made without an end date.




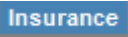
Steps to Update or Add Medicaid Insurance

1. Click **Insurance.** 
2. Select one of the following:
 - a. **Correction to Current Insurance.**
 - b. **Add a new Insurance Coverage.**
 - c. **Add a Historic Coverage.**
3. Enter information into the applicable fields.
4. Click **Save Page.** 

Appendix A: Summary of Steps

✓ Section 1:

Steps to Steps to Access the Update Ins Co/Alt Payor Screen

1. Enter Client search criteria
2. Click **Search HMS.** 
3. Select a client.
4. Click **Insurance.** 

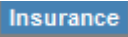
Steps to Access the Medicaid Insurance Data Entry Page

- Click Medicaid. 

Steps to Enter Medicaid Insurance Information

1. Enter Applicable fields based on client's eligibility status.
2. Click **Save Page.** 

Steps to Update or Add Medicaid Insurance

1. Click **Insurance.** 
2. Select one of the following:
 - a. **Correction to Current Insurance.**
 - b. **Add a new Insurance Coverage.**
 - c. **Add a Historic Coverage.**
3. Enter information into the applicable fields.
4. Click **Save Page.** 