



Medicaid Information Technology System

State & Local Government Solutions
Medicaid Information Technology System (MITS)

Introduction to TPL Participant Guide

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Objectives 28



Course Overview

The goal of this course is to provide you with an overview of the knowledge and common skills necessary to perform tasks within MITS for Third Party Liability (TPL) data. You will learn where TPL data is stored, created, and updated for the following types of data:

- Carriers
- Employers
- TPL information for recipients

The TPL function provides capabilities to manage the private health, and other third party resources of Medicaid consumers to ensure that Medicaid is the payer of last resort. This function works with a combination of cost avoidance (claim denial) and cost recovery (post-payment billing to insurers).

The primary objectives of the MITS TPL function are to:

- Identify third party resources available to Medicaid consumers.
- Avoid paying for claims with potential third party coverage.
- Recover funds from third parties when TPL resources are identified retroactively or for mandated "pay-and-chase" payments.
- Recover funds on Medicaid paid claims when it is discovered that other entities are liable.
- Meet federal and state TPL reporting requirements.

Some of the logistics of TPL will be covered in a more advanced course: TPL Nuts and Bolts.

Objectives

After completing this course you should be able to:

- Perform a search for a carrier to ensure that the carrier exists in the system
- Add and update carrier information
- Document a carrier buyout
- Search for a TPL recipient's employer
- Add and update a TPL recipient's employer information
- Submit a request to verify the TPL coverage information
- Add TPL information for a recipient
- Update TPL information for a recipient
- Correct TPL information in the Holding Tank.

Agenda

Topic	Time
Welcome and Introductions	15 minutes
Course overview	5 minutes
Searching for a carrier	15 minutes
Adding and updating carrier information Documenting a carrier buyout	40 minutes
Break	15 minutes
Searching for a Recipient's TPL Employer Information	15 minutes
Adding and updating a recipient's TPL employer Information	40 minutes
Break	15 minutes
Submitting a request to verify the TPL coverage information.	10 minutes
Adding TPL information for a recipient	40 minutes
LUNCH	60 minutes
Updating TPL information for a recipient	20 minutes
Correcting TPL information in the holding tank	40 minutes
Review	10 minutes

Prerequisites

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

- Introduction to TPL
- Online Reports & Letters

Searching for a Carrier

Overview

What

In this topic you learn how to perform a search for the carrier to ensure that the carrier exists in the system.

Who

OHP staff

When

You perform this task when the OHP staff receives (including but not limited to) any of the following:

- A letter sent by the insurance carrier with updated policy information.
- A copy of an insurance card from a recipient with updated or new carrier information.
- An unfamiliar carrier is sent by the Support Enforcement Tracking System (SETS) through the Holding Tank Process.

Relevance

You perform this task in order to ensure that the carrier information is accurate.

If the carrier information is not up-to-date, the following situations may occur:

- A claim may not be paid correctly
- A claim may be denied
- A verification letter will be sent
- A consumer's eligibility for services may be affected

Requirements

You must have a letter or verification to successfully complete this task.

Carrier can be updated when Support Enforcement Tracking System (SETS) send information through the SETS Interface.

How To

Follow these steps from the MITS home page to search for a carrier:

Step	Action
1	Click TPL .
2	Click carrier search .
3	Type information in the appropriate field(s) to narrow your search.
4	Select a different number of Records to display on a page from the drop-down list if necessary.
5	Click Search .
6	Scroll through the search results to locate the carrier.
7	Click the entry for the carrier.
8	Review the information for the carrier.

Success

You have successfully completed this task when the existing carrier information displays.

Next Steps

You may need to perform one of the following next steps:

- If carrier does not exist, add the information in the Third Party Liability (TPL) panels.
- If carrier information needs to be changed, update the information in the TPL panels.
- If a recipient has updated or new carrier information, modify the information for the recipient.

Practice

Search for a carrier using this information:

- Carrier Name: Western Union

Summary

In this topic you learned how to search for a TPL carrier.

Adding and Updating Carrier Information

Overview

What

In this topic you learn how to add or update carrier information.

You add or update carrier information to ensure that accurate carrier information exists in the MITS system.

Note: Although it is possible to delete a carrier from the MITS system, the OHP staff will rarely if ever use the functionality. Instead, OHP staff will likely enter an end date to remove the carrier from available carriers for selection.

Who

OHP staff

When

You perform this task when the OHP staff receives one of the following:

- A letter sent by the insurance carrier with updated policy information.
- A copy of an insurance card from a recipient with updated or new carrier information.
- A notification that one insurance carrier has purchased another carrier.
- An unfamiliar carrier is sent by the Support Enforcement Tracking System (SETS).

Relevance

Performing this task ensures that the carrier information is accurate.

If the carrier information is not up-to-date, the following situations may occur:

- Claims are not paid correctly
- Claims are denied
- A verification letter will be sent
- A consumer's eligibility for services may be affected

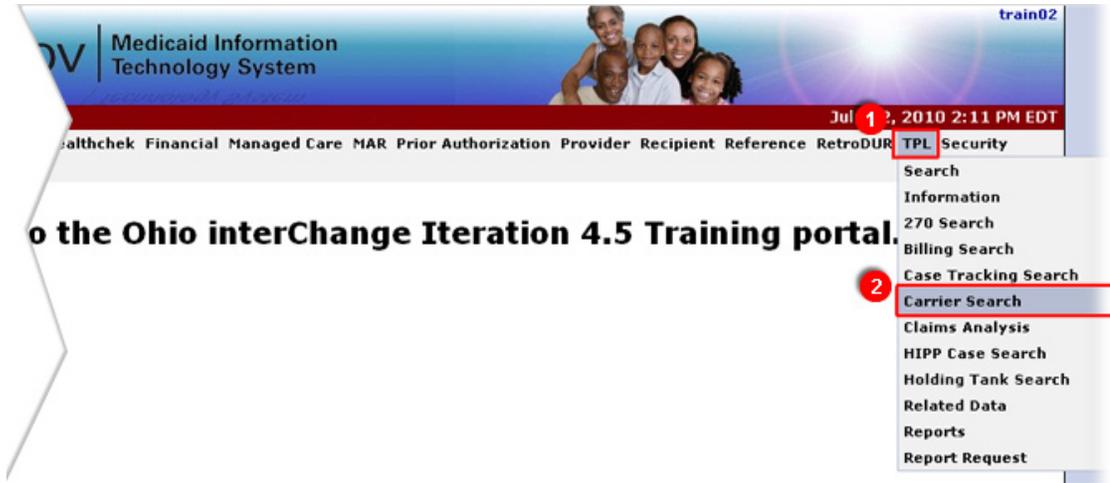
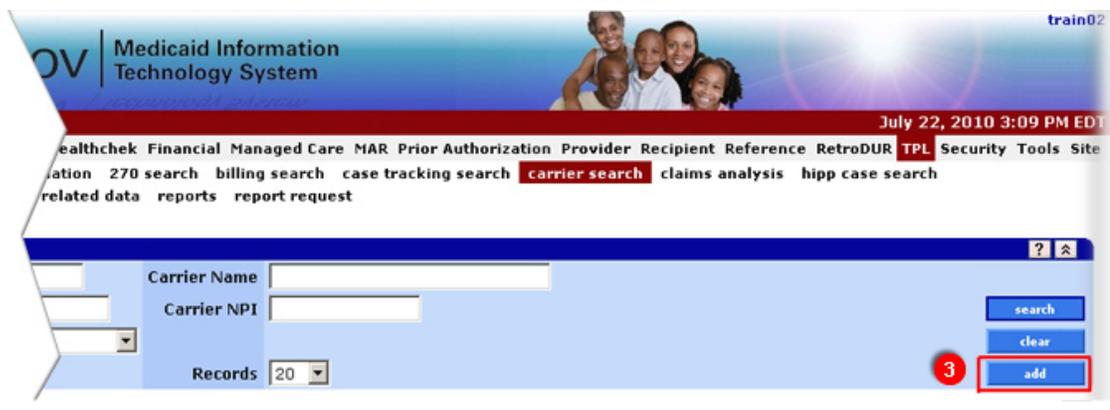
Requirements

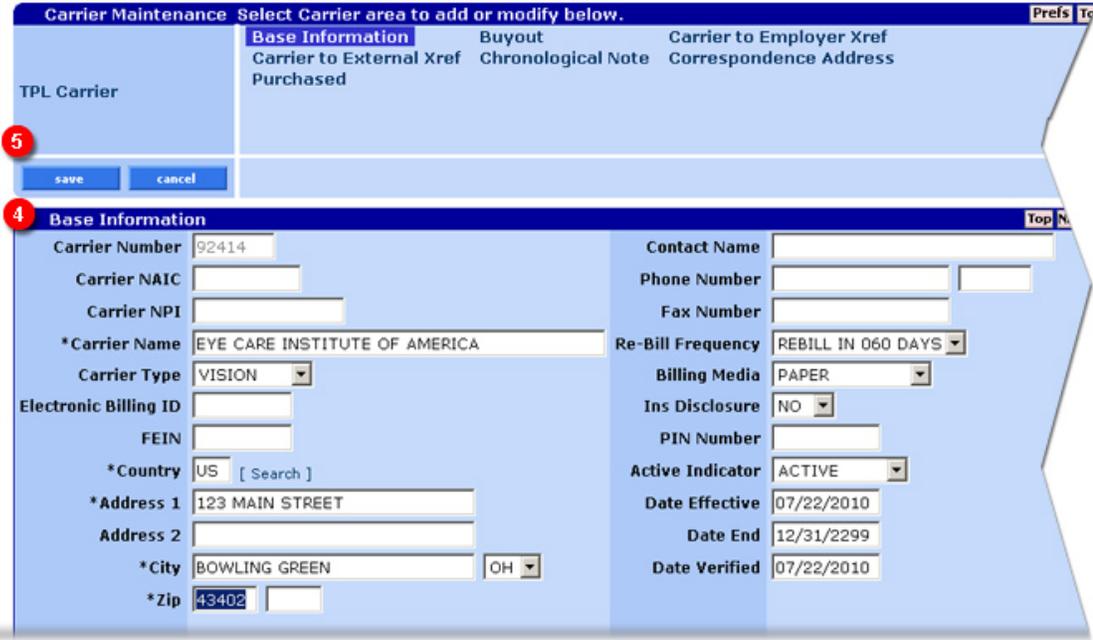
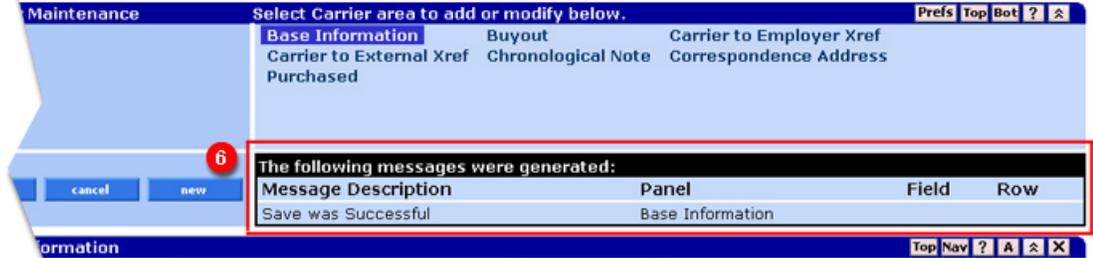
To perform this task you need verification of insurance. Examples may include the following:

- Letter, copy of insurance card, or on-line verification
- Notification of a carrier buyout from SETS

How To

Follow these steps from the MITS home page to add a new carrier entry:

Step	Action
1	Click TPL .
2	Click carrier search . 
3	Click add . 
4	Type or select information in all required and available optional fields. Note: The MITS system automatically assigns the carrier number.
5	Click save .

Step	Action
	
6	<p>You have successfully completed this task when a confirmation message appears.</p> 

Follow these steps from the MITS home page to update carrier information:

Step	Action
1	Perform the steps to search for an existing carrier.
2	Click the row for the desired carrier.
3	Type or select information in all of the fields that require updates.
4	Click save .

Follow these steps from the MITS home page to document a carrier buyout:

Step	Action
1	Perform the steps to search for an existing carrier.
2	Click the row for the desired carrier.
3	<p>Click Buyout</p>  <p>Result: The Buyout panel appears.</p>
4	Click Add in the Buyout panel.
5	<p>Click [Search] next to the Carrier Number field.</p> <p>Result: The Carrier Number search box opens.</p>
6	Type the name of the Carrier in the Carrier Name field and click search .
7	<p>Scroll through the search results and click on the row of the Carrier that performed the buyout.</p> <p>Result: Carrier Number and Carrier Name are populated in the Buyout panel.</p>
8	<p>Click save in the Carrier Maintenance panel.</p> <p>Result: Save was Successful message appears.</p>
9	Click save .

Note: The Carrier must have the status "active" in order to add buyout information. The Carrier's **Active Indicator** will indicate "Terminated" after you document the buyout.

Success

You have successfully completed this task when a confirmation message appears.

Next Steps

If a recipient has updated or new carrier information, modify the information for the recipient.

Practice

	Practice Task	Data
1.	Adding a Carrier	<p>Add a new carrier using this data:</p> <ul style="list-style-type: none"> Carrier Name = Your last name plus "Services" Other fields to create: City, State, Zip Carrier Type: Unknown Active Indicator: Active <p>When you are finished, repeat the carrier search steps and view your carrier to verify that you successfully created a carrier.</p>
2.	Updating a Carrier	<p>Update the carrier that you added in the prior practice:</p> <ul style="list-style-type: none"> Carrier Name: Use the Carrier that you added: Carrier Name = Your last name plus "Services" City = Arcadia Zip = 47970 Carrier Type = Pharmacy Contact Name = Ms. Cohen <p>When you are finished, repeat the carrier search steps and view your carrier to verify that you updated the carrier.</p>
3.	Documenting a Carrier Buyout	<p>Document a buyout of the carrier that you added in the prior practice:</p> <ul style="list-style-type: none"> Carrier Name: Use the Carrier that you created: Your last name plus "Services" Buyout Carrier = Testing Carriers of Ohio <p>When you are finished, repeat the carrier search steps and view your carrier to verify that you documented a buyout: The Active Indicator will indicate "Terminated."</p>

Summary

In this topic you learned how to add a new carrier, update the carrier, and document a carrier buyout.

Searching for a Recipient's TPL Employer Information

Overview

What

In this topic you learn how to perform a search for the TPL recipient's employer to ensure that the employer exists in the system.

Note: The TPL recipient's Employer information is not required for a Third Party Liability (TPL) resource, but is maintained if available.

Who

OHP staff

When

You perform this task when you receive information from a member or a provider.

Relevance

You perform this task in order to ensure that the employer information is accurate.

Requirements

You must have a letter from a member or provider to successfully complete this task.

How To

Follow these steps from the MITS home page to search for a TPL recipient's employer:

Step	Action
1	Click TPL .
2	Click related data .
3	Click Other in the left pane.
4	Click Employer in the right pane.
5	Type information in the appropriate field(s) to narrow your search.
6	Click Search .
7	Scroll through the search results to locate the employer.
8	Click the entry for the employer.
9	Review the information for the employer.

Success

You have successfully completed this task when existing employer information displays.

Next Steps

If a recipient has revised employer information or new employer information, modify the employer information for the recipient.

Practice

Search for the TPL recipient's employer using this information:

Learner	Employer ID	Business Name	Address	City
Learner 1	7569017	WESTERN RESERVE WIRE	HALF AND HALF DR	BLANCHARDVILLE
Learner 2	7546189	STONECO INC		ZEARING
Learner 3	7578811	ACME MACHINE AUTO	LIBERTY AVENUE	VALPARAISO
Learner 4	7578819	ACME INDUSTRIAL GROUP	CRUMMIT LANE	POINT LAY
Learner 5	7578827	ACME SPIRALLY WOUND PAPER PRODS	PARK BOULEVARD	GREAT BARRINGTON
Learner 6	7569011	WESTERN RESEVE PORT AUTHORITY	STILES STREET	SOUTH VIENNA
Learner 7	7569016	WESTERN SOUTHERN	PASSAIC STREET	EAGLE BEND
Learner 8	7560514	WOODLAWN HEALTH CARE	LIBERTY STREET	RINGGOLD
Learner 9	7560517	WOODLAND RETIREMENT COMMUNITY	TAYLOR STREET	CARLTON
Learner 10	7560522	WOODMAN OF THE WORLD	COLLEGE AVENUE	BEVIER

Summary

In this topic you learned how to search for an TPL recipient's employer in the TPL related data information.

Adding and Updating a Recipient's TPL Employer Information

Overview

What

In this topic you learn how to add or update a recipient's TPL employer information

You update the recipient's TPL employer information to ensure that accurate employer information exists in the system. Employer information is not required for a TPL resource, but is maintained if available.

Who

OHP staff

When

You perform this task when:

- A member or provider sends information.
- A case worker provides updated information.

Relevance

You perform this task to ensure that the employer information is accurate.

Requirements

To perform this task you need:

- A letter from member or a provider
- Contact from case worker

How To

Follow these steps from the MITS home page to add a Recipient's TPL employer information:

Step	Action
1	Click TPL .
2	Click related data .
3	Click Other .
4	Click Employer .
5	Click add .
6	Type or select information in all required and available optional fields.
7	Click save .

Follow these steps from the MITS home page to update a Recipient's TPL employer information:

Step	Action
1	Perform the steps to search for an employer.
2	Click the row for the desired employer.
3	Type or select information in all of the fields that require updates.
4	Click save .

Success

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

Next Steps

If a recipient has updated or new employer information, modify the information for the recipient.

Practice

Task/Topic	Data Requirements
Creating a Recipient's TPL Employer Information	<ul style="list-style-type: none"> • Business Name = Your last name + "TEST" • Address 1 = 333 Fairway • City = Bowling Green • Zip = 43402 • HIPP = No • Enrollment Start = Today's Date
Updating a Recipient's TPL Employer Information	<p>Use the Employer that you created in the prior practice:</p> <ul style="list-style-type: none"> • Business Name = Your last name + "TEST" • Address 2 = Suite 333 • Contact Name = Ms. Valerie Black • Email = ValerieBlack@gmail.com

Summary

In this topic you learned how to add and update a recipient's TPL employer information.

Submitting a Request to Verify TPL Coverage Information

Overview

What

In this topic you learn how to submit a request to verify the Third Party Liability (TPL) coverage information. A Policy Verification Letter, (TPL-9007-R) is initiated via the letter generator. The Policy Verification Letter is sent to a carrier when insurance information is entered, but not verified, if the carrier is not found, or if the carrier information is not up-to-date.

Who

OHP staff

When

You perform this task when insurance policy information is entered but not verified.

Relevance

You perform this task in order to obtain accurate information for the carrier.

If the carrier information is not up-to-date, the following situations may occur:

- A claim may not be paid correctly
- A claim may be denied
- A consumer's eligibility for services may be affected

Requirements

You must have a letter from a member, provider, or on-line verification with updated carrier information to successfully complete this task.

How To

Follow these steps from the MITS home page to submit a request to verify insurance policy information:

Step	Action
1	Click TPL .
2	Click search .
3	Type information about the recipient in the appropriate field(s) to narrow your search.
4	Click Search .
5	Scroll through the search results to locate the recipient.
6	Click the entry for the recipient.
7	Click Policy Letter .
8	Click the Policy Verification Letter entry.
9	Click letter .

Success

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

Next Steps

You may need to perform one of the following next steps:

- Check for a response daily.
- Run the Verification Letter Follow-up report.

Practice

Submit a request to verify insurance information using this information:

- Learner 1 Recipient ID: 859505159966
- Learner 2 Recipient ID: 851480212966
- Learner 3 Recipient ID: 859328605466

- Learner 4 Recipient ID: 855995609866
- Learner 5 Recipient ID: 850732214166
- Learner 6 Recipient ID: 811874801071
- Learner 7 Recipient ID: 854039873766
- Learner 8 Recipient ID: 855854264866
- Learner 9 Recipient ID: 854384465466
- Learner 10 Recipient ID: 852633681866

Note: Choose any row (policy holder) when more than one row exists.

Summary

In this topic you learned how to submit a request to verify the TPL policy information.

Adding TPL Information for a Recipient

Overview

What

In this topic you learn how to add TPL information for a recipient after the information has been verified.

Who

OHP staff

When

You perform this task when OHP staff receives a letter from one of the following sources:

- Carrier
- Member
- Case worker
- Provider letter or questionnaire

Relevance

If you do not add TPL information, the State of Ohio may not be able to cost avoid or recover the payment.

Requirements

You must have a letter from a carrier, member, employer, provider, or a case worker to successfully complete this task.

How To

Follow these steps from the MITS home page to add TPL information for a recipient:

Step	Action
1	Click TPL .
2	Click information .
3	In the Base Information panel, type the Recipient ID number into the Recipient ID field and then click off the field. Note: The system will verify the number is valid. Note: If you do not know the Recipient ID number, perform a search to find it.
4	Type the Carrier Number in the Carrier Number field (and click off the field). To locate the Carrier Number follow these steps: a. Click the Search link in the Carrier Number field in the Base Information panel. b. Type information in the appropriate field(s) to narrow your search. c. Click Search . d. Scroll through the search results to locate the carrier. e. Click the appropriate row for the carrier.
5	Type your information or make a selection from the drop-down lists in the required fields.
6	Add the Coverage information by following these steps: a. Click the Coverage link. b. Click add . c. Select a value from the drop-down list in the Coverage Code field. d. Type a date for the coverage code in the Effective Date field. e. Type a date for the coverage code in the End Date field. f. Repeat steps b - e for each type of coverage code.
7	Click save .

Success

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

Next Steps

If the letter did not originate from the carrier, generate a TPL Insurance verification letter to the carrier to verify the policy information.

You can create a document control number after this step.

Practice

Add the new Recipient TPL information using this information:

Data for Fields:

- Recipient ID = See list below
- Carrier Number = 03262 (Total Claims Solutions)
- Bill To = Provider
- Policy Number = 1234567Z
- Lead Origin = 6614 PROV INITIATED
- Verification Code = NOT VERIFIED
- Policy Priority = 1

Coverage:

- Coverage Code = N - Nursing Home
- Coverage Exhausted = No
- Effective Date = 06/30/2010
- End Date = 12/31/2011

Recipient Numbers:

- Learner 1 Recipient No = 859505159966
- Learner 2 Recipient No = 851480212966
- Learner 3 Recipient No = 859328605466
- Learner 4 Recipient No = 855995609866
- Learner 5 Recipient No = 850732214166
- Learner 6 Recipient No = 811874801071
- Learner 7 Recipient No = 854039873766
- Learner 8 Recipient No = 855854264866
- Learner 9 Recipient No = 854384465466
- Learner 10 Recipient No = 852633681866

When you are done, you can search the recipient to view the information.

Summary

In this topic you learned how to add the TPL information for a recipient.

Updating TPL Information for a Recipient

Overview

What

In this topic you learn how to update existing TPL information to ensure proper billing after the information has been verified.

Who

OHP staff

When

You perform this task when the OHP staff receives a letter as a result of the following:

- As a response to a letter sent out by OHP staff to the insurance carrier to verify the policy information.
- A provider printed a letter from the website, documented the updated information, and sent letter to OHP staff.
- A provider bills a claim with third party information
- A case worker communicates a change in the insurance policy coverage

Relevance

You perform this task in order to:

- Ensure proper payment.
- Keep records accurate.

If the recipient information is not up-to-date, the following situations may occur:

- A claim may not be paid correctly
- A claim could be denied
- A verification letter will be sent
- A member's eligibility for services may be affected

Requirements

You must have a letter from the insurance company to successfully complete this task.

How To

Follow these steps from the MITS home page to update TPL information for a recipient:

Step	Action
1	Click TPL .
2	Click search .
3	Type information in the appropriate field(s) to narrow your search.
4	Select a different number of Records to display on a page from the drop-down list if necessary.
5	Click Search .
6	Scroll through the search results to locate the recipient.
7	Click the entry for the recipient.
8	Click the Base Information link.
9	Update the information in the appropriate field(s) as necessary.
10	Click save .

Success

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

Practice

Update Practice Information: Update the TPL information using the Recipient ID from the prior practice:

Data:

Use the following fields and data for the update:

- Recipient ID = See list below (Use the Recipient ID number from the prior practice.)
- Employer ID = 7569044
- Employer Name = Western Union
- Policy Number = 987654321-XYZ
- Cost Avoidance = Yes
- Last Change Origin = 6614 PROV INITIATED

Recipient Numbers:

- Learner 1 Recipient ID = 859505159966
- Learner 2 Recipient ID = 851480212966
- Learner 3 Recipient ID = 859328605466
- Learner 4 Recipient ID = 855995609866
- Learner 5 Recipient ID = 850732214166
- Learner 6 Recipient ID = 811874801071
- Learner 7 Recipient ID = 854039873766
- Learner 8 Recipient ID = 855854264866
- Learner 9 Recipient ID = 854384465466
- Learner 10 Recipient ID = 852633681866

When you are done, you can search the recipient TPL record to view the updated information.

Summary

In this topic you learned how to update the TPL information for a recipient.

Correcting TPL Information in the Holding Tank

Overview

What

In this topic you learn how to correct Third Party Liability (TPL) information in the Holding Tank to ensure proper billing.

Who

OHP staff

When

You perform this task when there is corrected information for a recipient record in the holding tank.

Note: You monitor the holding tank daily.

Relevance

You perform this task in order to:

- Ensure proper payment
- Keep records accurate

If the carrier information is not up-to-date, the following situations may occur:

- A claim will not be paid correctly
- A claim will be denied
- A verification letter will be sent
- A member's eligibility for services may be affected

Requirements

You must have a TPL record in the holding tank to successfully complete this task.

How To

Follow these steps from the MITS home page to correct information for a claim record in the holding tank:

Step	Action
1	Click TPL .
2	Click holding tank search .
3	Type information in the appropriate field(s) or select information from the drop-down lists to narrow your search.
4	Select a different number of Records to display on a page from the drop-down list if necessary.
5	Click Search .
6	Scroll through the search results to locate the appropriate entry.
7	Click the appropriate entry.
8	Update the information in the appropriate field(s) as necessary.
9	Click save .

Success

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

Practice

Practice:

Learner 1: 5008289620
 Learner 2: 5008238791
 Learner 3: 5008444365 Use Recipient # 850174725666
 Learner 4: 5016040528
 Learner 5: 5034856400
 Learner 6: 5054292072
 Learner 7: 5058842617 Use Recipient # 761787090279
 Learner 8: 5076589448
 Learner 9: 5008444365 Use Recipient # 852328306166
 Learner 10: 5058842617 Use Recipient # 850515721266

Practice Revision: Correct the Carrier Number to be: 92406

Summary

In this topic you learned how to correct TPL information in the Holding Tank.

Review

Objectives

In this course you learned how to:

- Perform a search for a carrier to ensure that the carrier exists in the system
- Add and update carrier information
- Document a carrier buyout
- Search for a TPL recipient's employer
- Add and update a TPL recipient's employer information
- Submit a request to verify the TPL coverage information
- Add TPL information for a recipient
- Update TPL information for a recipient
- Correct TPL information in the Holding Tank.