



# Medicaid Information Technology System

**State & Local Government Solutions**

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**Medicaid Information Technology System (MITS)**

## **Release/Rule Directives 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 directives, releases and promoting releases.

### Objective(s)

After completing this course you should be able to:

- Add a directive
- Search for a directive
- Add a release
- Promote a release
- Associate a directive to a release

### Agenda

Topic	Time
Welcome and Introductions	10 minutes
Introduction to Directives	30 minutes
Searching for and Adding a Directive	30 minutes
Break	15 minutes
Introduction to Releases	30 minutes
Adding a Release	20 minutes
Promoting a Release	45 minutes
Associating a Directive to a Release	20 minutes

# Introduction to Directives

## Overview

A **directive** represents a new business requirement, legislative mandate, state plan initiative, or policy change. Create a new directive for each new business requirement to associate to changes in Benefit Plan Administration (BPA) data or reference data. Corrections to a business requirement previously entered under a new directive should be added to that same directive with a new directive version.



You must associate all new or modified BPA rules to the specific directive.

## Directives and OHP Policy

A directive, which is identified by a directive ID, allows Ohio Department of Job Family Services (ODJFS) to track the individual(s) that request, authorize and implement a change to BPA rules. For example, a rule change requiring a prior authorization for a new procedure code must be associated to a directive.

To fulfill such policy changes, directives are categorized as any of the following types:

- AOS - Auditor of State
- CFR - Code of Federal Regulations
- CMS - Centers for Medicare and Medicaid Services
- CNV - System Conversion
- HSB - House Bill
- OAC - Ohio Administrative Code
- OIG - Office of Inspector General
- ORC - Ohio Revised Code
- SNB - Senate Bill
- SPA - State Plan Amendment

## Directives and MITS

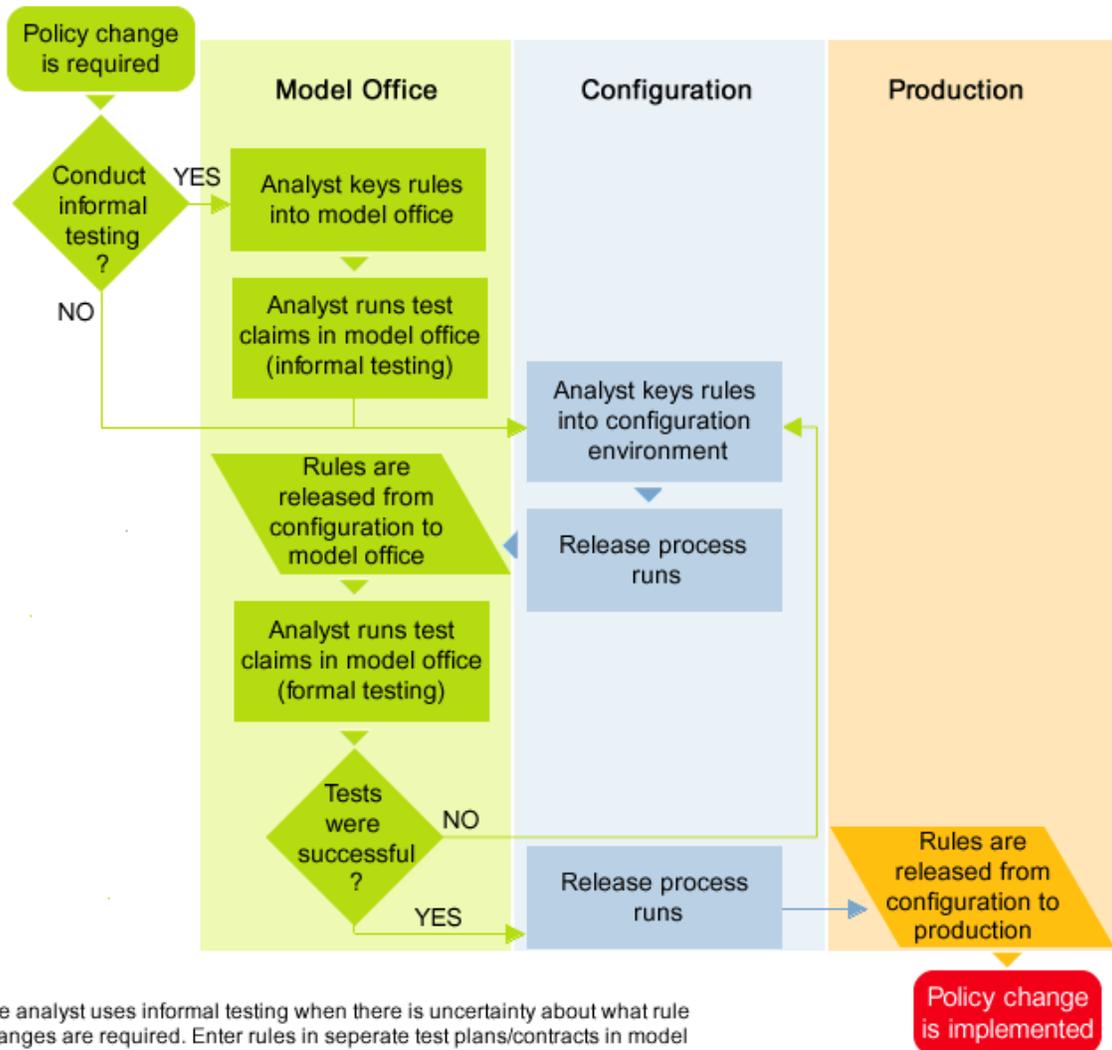
To create directives and promote the associated rule changes, you must be familiar with the various MITS environments:

TO:	THEN use this environment:
Configure BPA, configure reference data or update release promotion status	Configuration
Verify code and data changes and promote verified data to production	Model Office
Implement verified and tested changes	Production



You must complete and test the changes associated to a directive before you promote the changes to production. Do NOT test claims in the configuration environment.

**Note:** Each time you update a rule, MITS takes a snapshot of the date and the rule. You can access historical rule information in the Rule Edit panel by clicking View History.



The analyst uses informal testing when there is uncertainty about what rule changes are required. Enter rules in separate test plans/contracts in model office to avoid conflicts with formal testing.

## Directive Versions

Directive versions control updates to an original directive. To modify a rule or data element, select an available directive to link to the changes in policy. The resulting change produces a new directive version. The version process can be summarized as follows:

- 1) Add a directive.
- 2) Associate a directive to a release.
- 3) Make rule and reference data changes using the directive.
- 4) Promote the release.

**Example:** You promote an original directive to the production environment in **version 1**. Subsequently, you discover an error in the reimbursement rules. You correct the error in a new version, which represents **version 2**. **Version 1** contains the original policy and **version 2** contains the correction. Versioning keeps all policy changes together under one directive.



You create a new version of a directive when you associate the directive with a new release.

The following panel highlights where to view the version and release associated to a directive.

**Directive Information**

Directive ID: CNV2009      Directive Name: Conversion 2009  
 Business Area: System conversion      Sponsor: System Implementation  
 Effective Date: 12/05/2008      End Date: 12/31/2299  
 Description: This directive will be used for the initial load of go live rules.

**Directive Maintenance**      Select an area to add or modify

Directive: [text]  
 save    cancel    new

**Base Information**      Directive Type      Directive Version Rule Report  
 Version Associated Reference Data      Version Associated Rule Data      Version Release Status

**Directive Version:** Click the row to update and save a new version. Versions are created when a directive is associated with a release.

**Version and Release:** Indicates whether there is more than one version and the associated release.

**Directive Version**

Version	Release	Effective Date	End Date	Sponsor
1	SYSTEM IMP	06/10/2009	12/31/2299	System Implementation

Type changes below

Version: [1]      Release: [SYSTEM IMP]  
 Effective Date: [06/10/2009]      End Date: [12/31/2299]  
 Sponsor: [System Implementation]      Description: [This directive will be used for the initial load of go live rules.]

## Navigating in Directive Panels

Review the panels to learn more about using the directive panels to search, view, and create directives.

**Navigating in Directive Panels**

EDI Healthchek Financial Managed Care MAR Prior Authorization Provider Recipient **Reference** RetroDUR TPL Security Tools Sit

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

**Directive Search** ? ↕

Directive ID

Like

Directive Name

Directive Type

Business Area

Effective Date  < > =

Release Date  < > =

Release ID  [ Search ]

Release Status

Records 20

Click search to view ALL directives or further refine your search to specific criteria such as Directive Name.

**search** **clear** **add**

**Search Results**

Directive Name	Business Area	Originator	Latest Version	Latest Release ID	Release Status	Release Effective Date	Release End Date
Conversion 2009	System conversion	System Implementation	1	SYSTEM IMP	Current	05/10/2010	12/31/2299

**Navigating in Directive Panels**

**Directive Information**

Directive ID

Business Area

Effective Date 06/30/2010

Description

Directive Name

Sponsor

End Date 12/31/2299

**Directive Maintenance** Select an area to add or modify

**Base Information** **Directive Type** **Directive Version Rule Report**

Version Associated Reference Data Version Associated Rule Data Version Release Status

Directive

**save** **cancel** **new**

**Base Information** Top

\*Directive ID CNV2009B

\*Directive Name TRAINING VERSION 1

\*Business Area Billing

\*Sponsor Ohio MITS

\*Effective Date 06/30/2010

\*End Date 12/31/2299

\*Description Training

Click associated links to view rules, benefit groups or other data associated to the directive versions or the Directive Version Rule Report.

**Navigating in Directive Panels**

Directive Maintenance Prefs Top Bot ? ⌂

Select an area to add or modify

Base Information Directive Type Directive Version Rule Report

Version Associated Reference Data Version Associated Rule Data Version Release Status

Directive

save cancel new

The following messages were generated:

Message Description	Panel	Field	Row
Base Information - Save was Successful	Base Information		

Base Information Top Nav ? A ⌂ X

\*Directive ID: CNV2009B      \*Directive Name: TRAINING VERSION 1

\*Business Area: Billing      \*Sponsor: Ohio MITS

\*Effective Date: 06/30/2010      \*End Date: 12/31/2299

\*Description: Training

Review message descriptions to confirm success after you add a directive.

Directive Version Top Nav ? A ⌂ X

\*\*\* No rows found \*\*\*

Select row above to update.

Version:       Release:

Effective Date:       End Date:

Sponsor:       Description:

Directive Type Top Nav ? A ⌂ X

Directive Type

AOS - Auditor of State

## 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.

When you change a directive, you create a new directive \_\_\_\_\_

- A. release
- B. version
- C. directive
- D. policy

You must link new rules or updates to existing rules to a specific directive.

- A. True
- B. False

Use this environment to configure BPA and reference data and to update release promotion statuses.

- A. Production
- B. Model Office

- C. Configuration
- D. Testing

## Searching for a Directive

### What

In this topic you learn how to search for an existing directive.

### Who

OHP Staff and Configuration Analysts with proper security perform this task.

### When

You perform this task when there is a need to research a directive or view BPA rule or reference data changes associated with a directive.

### Relevance

This task is important because directives allow you to track and audit changes to rule or reference data.

## How To

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

Step	Action										
1	Click <b>Reference</b> .										
2	Click <b>Directive</b> .										
3	Click <b>search</b> OR specify additional criteria and then click <b>search</b> .										
4	Click the desired record (directive) from the search results. <b>Note:</b> When there is only one directive it displays automatically.										
5	Select your desired view by following these steps: <table border="1" data-bbox="371 865 1375 1243"> <thead> <tr> <th>TO:</th> <th>THEN click the:</th> </tr> </thead> <tbody> <tr> <td>See more detailed information</td> <td>Appropriate directive version row</td> </tr> <tr> <td>View a list of the reference data</td> <td><b>Version Associated Reference Data</b> link</td> </tr> <tr> <td>View a list of the rule data</td> <td><b>Version Associated Rule Data</b> link</td> </tr> <tr> <td>View the release status</td> <td><b>Version Release Status</b> link</td> </tr> </tbody> </table>	TO:	THEN click the:	See more detailed information	Appropriate directive version row	View a list of the reference data	<b>Version Associated Reference Data</b> link	View a list of the rule data	<b>Version Associated Rule Data</b> link	View the release status	<b>Version Release Status</b> link
TO:	THEN click the:										
See more detailed information	Appropriate directive version row										
View a list of the reference data	<b>Version Associated Reference Data</b> link										
View a list of the rule data	<b>Version Associated Rule Data</b> link										
View the release status	<b>Version Release Status</b> link										

## Success

You have successfully completed this task when you can view the directive and associated details.

## Practice

- Search for all directives by clicking **search**.
- Click a directive ID from the **Search Results** panel and click the **Directive Version** line item to activate the panels associated to the directive version.

After successfully displaying the existing directives, be prepared to:

- Describe what appears on the **Search Results** panel.
- Click the **Version Associated Reference Data** link and describe what displays.

## Adding a Directive

### What

In this topic you learn how to add a new directive.

### Who

OHP Staff and Configuration Analysts with proper security perform this task.

### When

This task is performed when you receive a request that may come in the form of a:

- Change request
- Request for Proposal (RFP)
- Legislative mandates
- State Plan initiatives and policies

### Relevance

You must associate a directive to a release in order to promote changes to production.

### Requirements

In order to perform this task:

- You need to have an approved policy change.
- You must select one or more directive type(s) using the **Directive Type** panel

## How To

Follow these steps from the MITS home page to add a directive:

Step	Action
1	Click <b>Reference</b> .
2	Click <b>Directive</b> .
3	Click <b>add</b> .
4	Type the desired (required) information in the <b>Base Information</b> panel.
5	Click the <b>Directive Type</b> link in the <b>Directive Maintenance</b> panel.
6	Click <b>add</b> .
7	Select the desired directive type from the <b>Directive Type</b> drop-down list.
8	Click <b>save</b> .

## Success

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

## Next Steps

After adding a directive you must add it to a release in order to make and promote rule and reference data changes.

## Practice

Add a directive using this information:

- Directive ID - your first name
- Business Area - Billing
- Directive Name - your last name
- Specify a sponsor, description and select an applicable directive type

# Introduction to the Release Process

## Overview

To promote changes under a directive, you must associate the directive to a **release**. A release is a package of BPA data and reference data that is keyed, tested and promoted. A release has multiple release records; each with a release status code and an effective end date.

You can promote only one release at a time. You **cannot** work on the next release until you promote the current release to production. However, you can work concurrently on one scheduled release and one emergency release.



While you promote reference and BPA data in conjunction with system releases, you do not promote drug data and provider rates. You must update drug data directly in production. Do not update provider rates as they are part of the pricing process.

## Release Definitions

To promote releases to the production environment, you must be familiar with the following release definitions:

Release Status	Release Description
<b>Future</b>	A release that is not yet active. Use a future status to create a set of regularly scheduled releases in advance.
<b>Current</b>	A scheduled release that is active. Use a current status to make changes to rules in the configuration environment.
<b>Emergency-Current</b>	An active release that you can use to make immediate rules change in the configuration environment.
<b>Ready for Model Office</b>	A release that is ready to be promoted to model office. Once the promotion batch job runs, the data is available in the model office environment.
<b>Promoted to Model Office</b>	A release that was promoted to model office and was added by the promotion batch job. <b>Note:</b> A release can be promoted to model office multiple times, by changing a release in <b>Promoted to Model Office</b> status back to <b>Current/Emergency-Current</b> .
<b>Ready for Production</b>	A release that is ready to be promoted to production. Once the promotion batch job runs, the data is active in the production environment.
<b>Promoted to Production</b>	A release that was promoted to production and is now locked. <b>Note</b> – You cannot set the status. The promotion job updates the status.

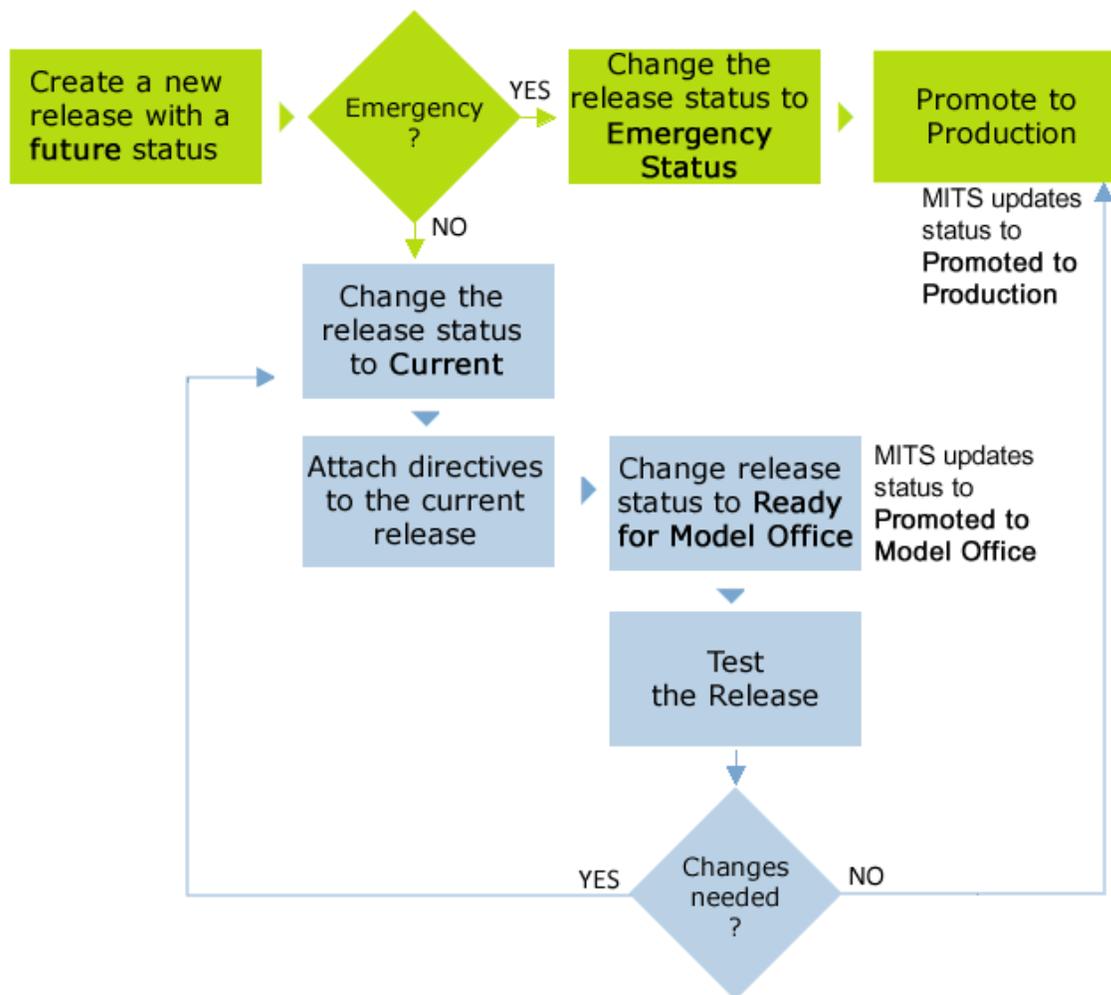
## The Release Process

Promoting a release involves updating the promotion status. Update the promotion status in the configuration environment and then promote the release to the model office environment. You must test changes in the model office environment **BEFORE** you promote the changes to production environment. A batch job runs on a scheduled or as-needed basis to monitor releases that are ready for promotion to the model office or production environment.



You may promote changes to production only after testing and validating the results. If you need to make further changes based on testing results, change the status back to the configuration environment in order to update and repromote to model office for additional testing.

Promote releases to production using the following flow:



## Navigating in the Release Process Panels

Review the panels to learn more about using the release panels to promote releases.

**Navigating in the Release Panels**

Home Claims Drug EDI Healthchek 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**

**Reference Release Search** ? ↕

Release ID: A1 Description: Release for new HIPAA Status Codes search

Release Current Status: Future Directive ID: CNV2009 [ Search ] clear

Records: 20 add

Current  
**Emergency-Current**  
 Future  
 Not Implemented  
 Promoted to Model Office  
 Promoted to Production  
 Ready for Model Office  
 Ready for Production

**1** Begin the process by selecting **Future** status. Only select **Emergency-Current** when immediate release is required.

**Navigating in the Release Panels**

Home Claims Drug EDI Healthchek 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**

**Reference Release Search** ? ↕

Release ID: A1 Description: Release for new HIPAA Status Codes search

Release Current Status: Future Directive ID: CNV2009 [ Search ] clear

Records: 20 add

Current  
 Emergency-Current  
 Future  
 Not Implemented  
**Promoted to Model Office**  
 Promoted to Production  
 Ready for Model Office  
 Ready for Production

**2** **Release Current Status:** Select the appropriate status to test and promote the applicable changes.

### Navigating in the Release Panels

The screenshot shows a web application interface with several panels. The top panel is titled "Release Information" and contains fields for Release ID (SYSTEM IMF), Description (System Implementation), Long Description (Release for initial system implementation.), and Note. Below this is the "Release Maintenance" panel, which has a sub-panel titled "Release Directives" highlighted with a red box and a callout "3 Release Directives: Click to associate directive to current release." The bottom panel is titled "Release Directives" and contains a table with columns: Directive ID, Version, Date of Association, and Sponsor. The table has one row with values: CNV2009, 1, 06/10/2009, and System Implementation. Below the table are input fields for Directive ID, Date of Association, Version, and Sponsor, and an "add" button highlighted with a red box and a callout "4 Add: Click to add directive to current release".

**Release Information**

Release ID: SYSTEM IMF  
Description: System Implementation  
Long Description: Release for initial system implementation.  
Note:

**Release Maintenance** Select an area to add or modify

Base Information | **Release Directives** | Release Status

3 **Release Directives:** Click to associate directive to current release.

save cancel new

**Base Information**

**Release Directives**

Directive ID	Version	Date of Association	Sponsor
CNV2009	1	06/10/2009	System Implementation

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

Directive ID: [ Search ] Version: [ Search ]  
Date of Association: [ Search ] Sponsor: [ Search ]

4 **Add:** Click to add directive to current release

add

## Check Your Understanding

Use this status to create a set of regularly scheduled releases in advance.

- A. Promoted to Model Office
- B. Future
- C. Current
- D. Emergency - Current

While there may be only one release in CURRENT status, there may also be a release in EMERGENCY CURRENT status. You can work on both the CURRENT release and the EMERGENCY CURRENT release concurrently (simultaneously).

- A. True
- B. False

# Promoting Changes from the Configuration to Production Environments

## What

In this topic you learn how to promote changes to policies or rules from the configuration environment to the production environment through a release. A release can be associated to multiple directives which tie together BPA and reference data changes. You can promote releases on a scheduled basis (i.e., normal workflow) or on an on-demand basis (i.e., emergency workflow).

## Who

A BPA Analyst promotes releases from the configuration environment to the production environment.

## When

Perform this task when you need to implement new directives with policy or reference data changes.

## Relevance

This task is important because it allows you to implement new rules and reference data changes in the production environment.

## Requirements

- You must work on only one release at a time. You cannot work on the next release until you promoted the current release to production.
- Make all release status changes in the configuration environment. You cannot make BPA rule or data changes in the production environment.
- Associate a directive version to only one release.

## Guidelines

- Enter rule changes in the configuration environment, but verify results in model office by running claims in model office following a promotion to that environment.
- You may not set release status effective dates in the past.
- To set a promotion to a future date, change the release status effective dates when the next step in the logical progression is **Ready for Model Office** or **Ready for Production**.

- You may not set release status end dates as they are set by the system. The current release status default end date is 12/31/2299.
- You can delete a release status segment only when the current status is **Ready for Model Office** or **Ready for Production**.

## Adding a New Release

Follow these steps from the MITS Configuration environment:

Step	Action
1	Select <b>Release</b> from the <b>References</b> drop-down list.
2	Type a release ID, description, and directive ID.
3	Select <b>Future</b> from the <b>Release Current Status</b> drop-down list.
4	Click <b>add</b> .
5	Type a description, release ID and long description for the new release.
6	Click <b>save</b> .

## Promoting a Release

Follow these steps from the MITS home page to promote a release:

Step	Action												
1	Select <b>Release</b> from the <b>References</b> drop-down list.												
2	Select the appropriate status from the <b>Release Current Status</b> drop-down list.												
3	Click <b>search</b> .												
4	Click <b>Release Status</b> .												
5	Click <b>add</b> .												
6	Select statuses based on the applicable stage in the promotion process. <table border="1" data-bbox="371 810 1375 1598"> <thead> <tr> <th>TO:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Make a future release current</td> <td>Select <b>Current</b> from the <b>Status</b> drop-down list.</td> </tr> <tr> <td>Make a future release an emergency release</td> <td>Select <b>Emergency</b> from the <b>Status</b> drop-down list. <b>Note:</b> Only one release can have the <b>Emergency</b> status.</td> </tr> <tr> <td>Promote a current release to model office to test</td> <td>Select <b>Promote to Model Office</b> from the <b>Status</b> drop-down list.</td> </tr> <tr> <td>Promote a release that was tested and validated in model office to production</td> <td>Select <b>Ready for Production</b> from the <b>Status</b> drop-down list.</td> </tr> <tr> <td>Revert a release that was promoted to model office back to the configuration environment in order to rework the changes</td> <td>Select <b>Current</b> from the <b>Status</b> drop-down list.</td> </tr> </tbody> </table>	TO:	THEN:	Make a future release current	Select <b>Current</b> from the <b>Status</b> drop-down list.	Make a future release an emergency release	Select <b>Emergency</b> from the <b>Status</b> drop-down list. <b>Note:</b> Only one release can have the <b>Emergency</b> status.	Promote a current release to model office to test	Select <b>Promote to Model Office</b> from the <b>Status</b> drop-down list.	Promote a release that was tested and validated in model office to production	Select <b>Ready for Production</b> from the <b>Status</b> drop-down list.	Revert a release that was promoted to model office back to the configuration environment in order to rework the changes	Select <b>Current</b> from the <b>Status</b> drop-down list.
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Promote a release that was tested and validated in model office to production	Select <b>Ready for Production</b> from the <b>Status</b> drop-down list.												
Revert a release that was promoted to model office back to the configuration environment in order to rework the changes	Select <b>Current</b> from the <b>Status</b> drop-down list.												
7	Click <b>save</b> .												

## Associating a Directive to a Release

Follow these steps from the MITS Configuration environment:

Step	Action
1	Select <b>Release</b> from the <b>References</b> drop-down list.
2	Select the <b>Current</b> from the <b>Release Current Status</b> drop-down list.
3	Click <b>search</b> .
4	Click the <b>Release Directives</b> link from the <b>Release Maintenance</b> panel.
5	Click <b>add</b> .
6	Click the associated directive to add to the release.
7	Type the sponsor name.
8	Click <b>save</b> .

## Practice

### Practice adding a new release using this information:

- **Directive ID** - The directive ID you created in a previous practice exercise
- **Release ID** - Your name followed by "Train1"

### Promote a new release using this information:

Change the **Future** release status to **Current**.

### Practice associating a directive using this information:

- **Release Current Status** - Current
- Add the directive ID you created in a previous exercise.

After successfully promoting a release and associating a directive, discuss what you see on the **Release Directives** panel.

## Success

You have successfully promoted changes to reference data, rules, or BPA data when you see the change associated to the directive and release in the **production** environment.

## Next Steps

If a release has been promoted to the **model office** environment, test the change in the model office environment and then promote the change to the **production** environment.

If an erroneous change was promoted to the **production** environment, create a new release and associate the applicable directive(s) with appropriate rules and BPA data changes.

## Review

### Objectives

In this course you learned how to:

- Add a directive
- Search for a directive
- Add a release
- Promote a release
- Associate a directive to a release