

REV - Keywording Procedure

Purpose:

Keywording is a process by IME Revenue Collections. Only documents that are to be worked and/or completed by Revenue Collections are keyworded by designated staff. This process is performed in order that a document can be retrieved in OnBase by entering keywords in the corresponding search fields such as a Medicaid Members name, State Identification Number, Lien Case file number, or other items that IME staff would need entered to correctly locate a member's information in the OnBase system.

Identification of Roles:

IME CORE: Scans documents into OnBase

IME Revenue Collections: Keywords the documents

Performance Standards:

Daily, as needed

Path of Business Procedure:

Entering specific data into a document's Keyword Dialogue Box in OnBase for retrieval purposes. Revenue Collections documents that are dropped into the appropriate OnBase Life Cycle Queues must be keyworded.

Step 1: CORE scans a document and loads it into the REV 01 Queues in OnBase according to the established procedures.

Step 2: Revenue Collections associates access the REV 01 Queues in OnBase.

Step 3: Revenue Collections Keywords all documents in the REV01 Life Cycle Queues belonging to Revenue Collections unless they are being sent to the Recycle Bin.

Step 4: To keyword: Revenue Collections populates the following fields in the Keyword Dialogue Box with information found on the accompanying documentation:
a) Member's first, middle initial and last name

b) Member's State Identification Number (ID)

c) IME Lien Case Number (if applicable)

Note: If Member's State ID is not available, the Member's Social Security Number is entered if available.

Step 5: When documentation comes into the Revenue Collections Provider Overpayment OnBase Queue regarding a change of address for a provider, the following keyword is completed:

a) Provider number

Step 6: Revenue Collections enters the "Provider Updated Address" in the group clinic name.

Step 7: When Revenue Collections receives a Wells Fargo Lockbox Deposit Form for Photostat checks in the Provider Overpayment Queue, "Wells Fargo Photostat Sheet" is entered in the Group/Clinic Field of the Keyword Dialogue Box.

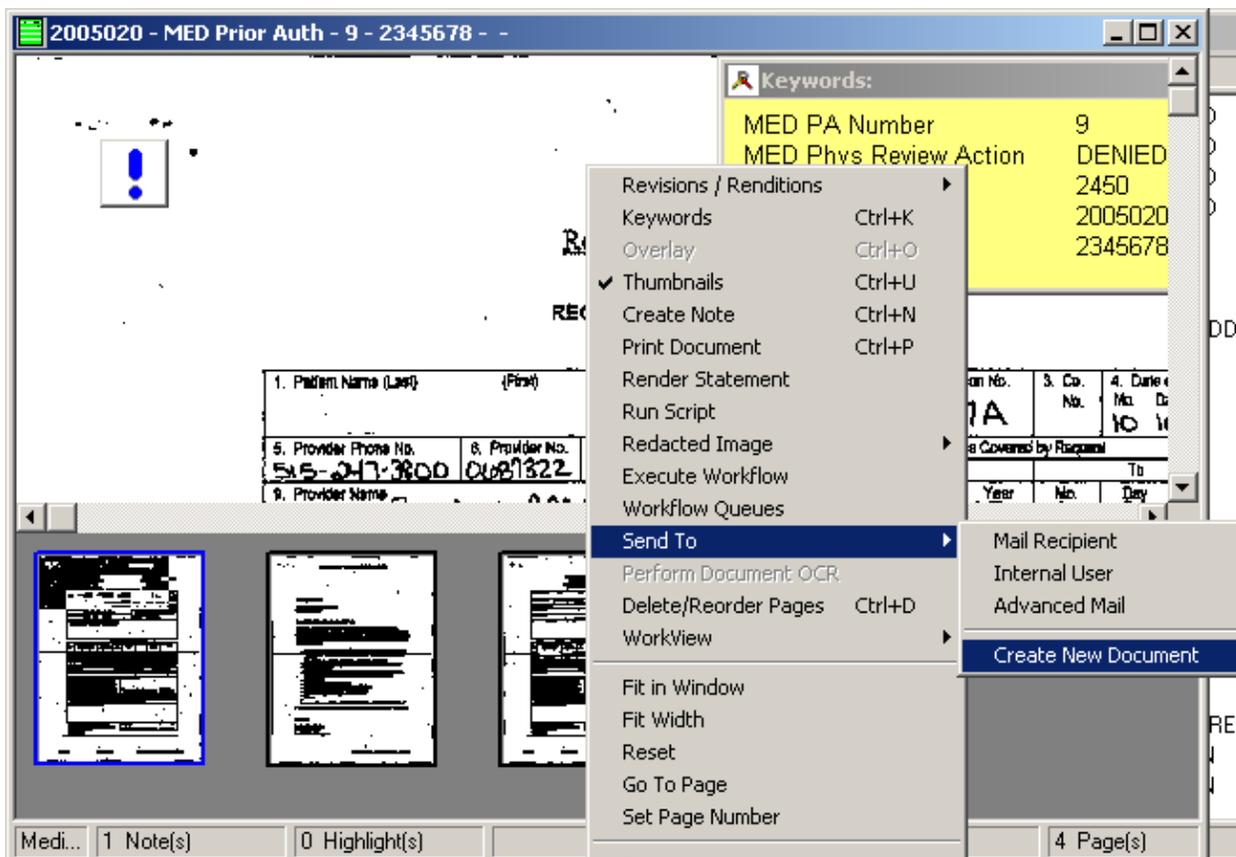
Step 8: The Revenue Collections Quality Analysis (Q.A.) staff member reviews 3% of all documents keyworded and completes a Keywording Audit Form.

Step 9: If a document (Not including a check) needs to be separated or split, the following procedure is completed, (examples: one page should be excluded from the scan, or two different documents were scanned in as one). Information received from Core Unit manual:

Forms/Reports:

SPLITTING A DOCUMENT IN ONBASE

A document may get scanned into OnBase that is actually two, or more, separate documents. Right click on the document, select **Send To > Create New Document**.



In the **Create new document from existing** box specify which pages should be in the document being created. Ideally a split should be done before any keywords are added. If keywords are added prior to the split being done, delete all keywords that are not pertinent to the new document being created. The two keywords that **need to be deleted** are the **DCN** and **X-Ref DCN**. The three keywords that are **required** are the **Unit name**, **Date Received** and **Archive Box Number**.

Create new document from existing

Document type:
MED Prior Auth

Create from pages:
1,2,4

Delete copied pages from original document
 Create as revision of original document

Keywords

Archive Box # 23

County

Date Routed / /

DCN

Denial Reason

OK Clear Keywords Cancel

Uncheck the **Delete copied pages from original document** box. (This can be left checked if desired, this will remove the pages that are selected from the existing document.)

The dialog box is titled "Create new document from existing". It contains the following fields and options:

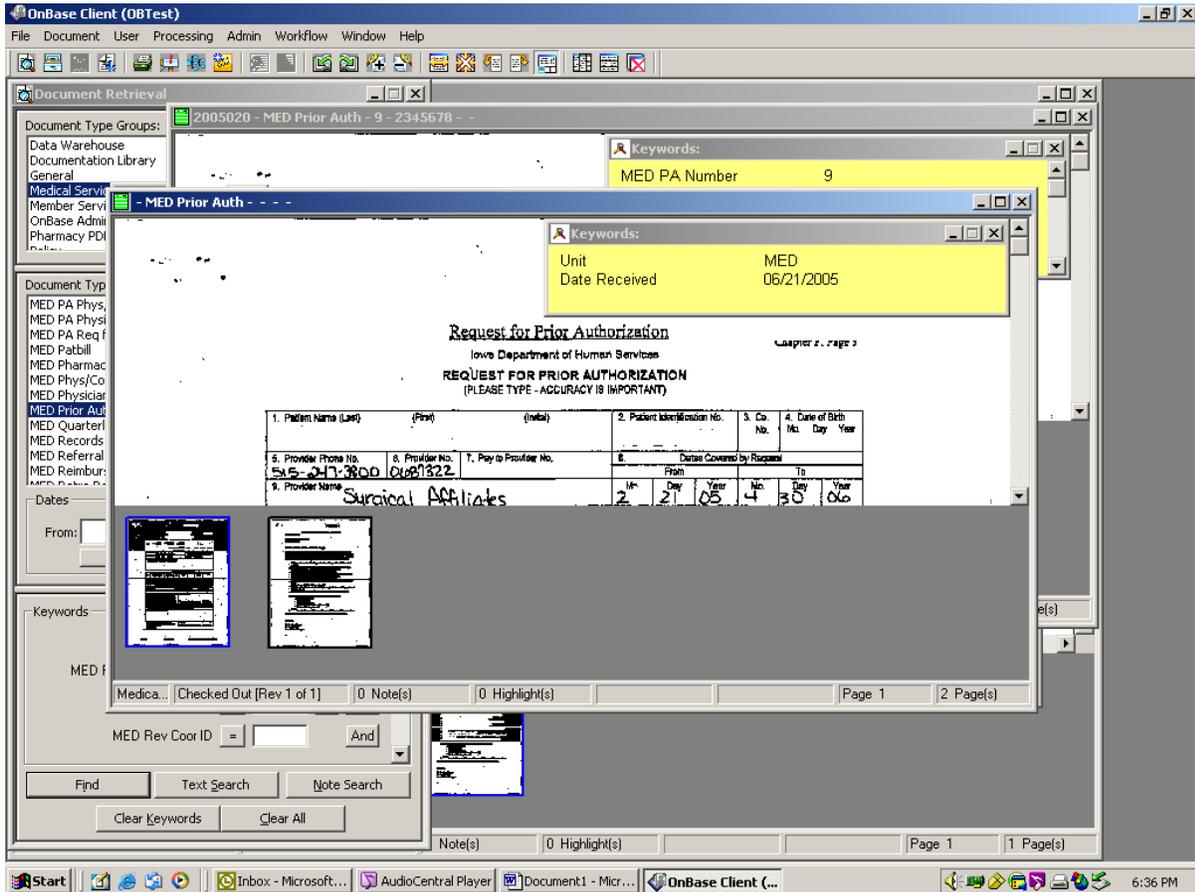
- Document type: MED Prior Auth (dropdown menu)
- Create from pages: 1,2,4 (text input)
- Delete copied pages from original document (indicated by a red arrow)
- Create as revision of original document
- Keywords section with input fields for:
 - Archive Box #: 23
 - County
 - Date Routed: / /
 - DCN
 - Denial Reason
- Buttons: OK, Clear Keywords, Cancel

The following box may be displayed. Click **Save as New Document**. If this box is not displayed continue to the next step.

The dialog box is titled "Document Revisions" and contains the following elements:

- Text: "This document appears to be related to an existing document. If so, please select the original document, enter a revision note and select the appropriate option below."
- Existing Documents list: 2005020 - MED Prior Auth - 9 - 2345678 - - PRESCREEN
- Comment: (empty text area)
- User Name: ID08382, Date: 06/21/2005
- Buttons: Save as Revision, Save as Rendition, Save as New Document, Cancel

The system will create the new document; it will be displayed on the screen to view.



After the document is created it will be available in workflow to work.

Documentation to be Keyworded

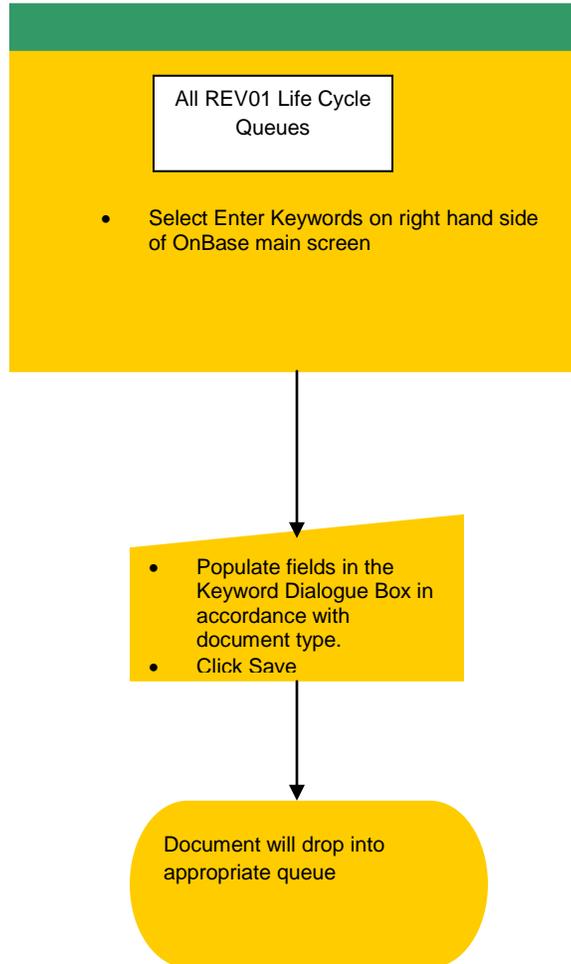
The screenshot displays the OnBase Client (O8PProd) interface. On the left, a 'Workflow' pane shows a tree view of tasks, including 'REV01 - Revenue Work LC' with sub-items like 'REV01 - Provider Overpayment [196]', 'REV01 - TPL [9]', and 'REV01 - Lien Recovery [63]'. Below this is a 'Document Name' list with entries such as '2006159 - REV Trauma Lead Letter' and '2006159 - Correspondence - IN PROCESS - 06060038 - 11750...'. The main area shows a document preview of a letter from American Family Insurance Group, dated August 8, 2006, addressed to the State of Iowa. The letter includes patient information for David J. Genna, born August 17, 2006, and provides contact details for the company. A 'Keywords' pane at the bottom shows three document thumbnails. On the right side, a 'Tasks' pane contains icons for 'Enter Keyword', 'Pend', 'Complete', 'Send to Unit Lead', 'Switch Workloc Type', and 'Reroute'.

RFP References: N/A

Interfaces: CORE

Attachments:

8.4. Keywording Flowchart



Acronyms:

TPL – Third Party Liability

SID – State Identification Number

SSN – Social Security Number

IME – Iowa Medicaid Enterprise

DHS – Department of Human Services

MMIS – Medicaid Management Information System