

Alerts Process and Format

Purpose:

This document outlines the alert process for patient enrollment, updates, and disenrollments within various programs, including FUOP, SOAP, CSP, Urgent Care (UC), RESI Men, Resi LYN, and CSS/ATS. It also defines the Quality Assurance (QA) process for both Patient Access Team (PAT) and Practice Management (PM) staff to ensure accurate data management and to promote a continuous approach to accuracy.

1. Enrollment Process:

Patient enrollment into any programs triggers an enrollment alert from Patient Access Team (PAT), allowing Practice Management (PM) staff to verify patient eligibility with health plans and enter the benefit assignment into Evolv (EHR) in real time. As soon as the enrollment is completed in Evolv, an alert is immediately sent to the '**PM/Finance work group**' in Evolv.

Subject Line Requirements:

- Format: *Enrollment, Date of Intake/Enrollment, %Evolv ID (last 4 digits), Program Name(s)*
- If the patient is enrolling in multiple programs, list all programs in the subject line to ensure accurate processing by PM staff working on different programs.

Message Box Specifications:

- Insurance Name
- Member ID
- Sub Dx or Mental Health Dx

Quality Assurance (PAT):

- PAT should reconcile daily at the end of each day to ensure all enrollments are captured. This reconciliation should be recorded and archived.

- Reconciliation reports can be sent in Excel format or as an email to the Practice Management inbox **pracmanagement@casaesperanza.org** in Outlook. There should be a reconciliation report sent for each program daily.

Quality Assurance (PM Staff):

- PM staff will validate all enrollment data provided in the alerts and reconciliation reports.
- Any discrepancies identified will be communicated via email to the PAT Director, with an escalation to the Payer Relations Director, Practice Management director, and program leaders for further process improvement discussions if necessary.

Closure:

- Process improvements, when needed, will be discussed during the applicable Program/PM bi-weekly meetings.

2. Enrollment Update Process

Patient is already enrolled into the following programs **FUOP, SOAP, CSP, RESI Men, Resi LYN**. This enrollment update alert allows Practice Management to update all BSAS enrollment information in the Virtual Gateway after the BSAS has expired or information was missed in initial enrollment. As soon as the enrollment update is completed in Evolv, an alert is immediately sent to the '**PM/Finance work group**' in Evolv.

Subject: Enrollment Update, date enrollment update, Evolv ID (%last 4 digits), Program name

- This alert should come directly from the 'Comp 1 Form' in Evolv. (Outpatient services)
- This alert should come directly from the 'BSAS level of care form' in Evolv. (Residential services)

Message Box specification: Sub Dx or Mental Health Dx, Specification on what was updated if an updated enrollment form was not completed.

- **Quality Assurance (PAT):** PAT should reconcile daily at the end of each week to ensure all enrollment updates are captured.
- Reconciliation reports can be sent in Excel format or as an email to **pracmanagement@casaesperanza.org** in Outlook. There should be a reconciliation report sent for each of the above programs once a week on **Fridays**.

Quality Assurance (PM Staff):

- PM staff will validate all enrollment data provided in the alerts and reconciliation reports.
- Any discrepancies identified will be communicated via email to the PAT Director, with an escalation to the Payer Relations Director, Practice Management director, and program leaders for further process improvement discussions if necessary.

Closure: Process improvement needs will be discussed in the applicable Program/PM bi-weekly meetings.

3. Disenrollment Process:

When a patient is already enrolled in the **Urgent Care program** and has either been referred out of Casa Esperanza or has been enrolled into another program in Casa and the enrollment is ended in Evolv. An alert from PAT allows PM to close out the benefit assignment in Evolv.

Please note, there should be no changes to the current program team disenrollment process

Subject Line Requirements:

- Format: *Urgent Care disenrollment, Date of disenrollment, Evolv ID (last 4 digits)*
- This alert should come directly from the 'program enrollment' update screen after PAT closes the enrollment.

Message Box Specifications: N/A

Quality Assurance (PAT):

- PAT should reconcile at the end of each day to ensure all UC disenrollments are captured.
- Reconciliation reports can be sent in Excel format or as an email to **pracmanagement@casaesperanza.org** in Outlook. There should be a reconciliation report sent for UC program daily.

Quality Assurance (PM Staff):

- PM staff will validate the information provided on the alerts and reconciliation reports.
- Discrepancies will be addressed by sending an email to the program staff, escalating to the payer relations director, practice management director, and program leaders to discuss potential process improvements if necessary.

Closure:

- Any process improvement needs will be discussed during the applicable Program/PM bi-weekly meetings.

Effective date: March 31, 2025