

# Innovative

Management Systems

Provider Tutorial  
Eligibility Verification and  
Discrepancy Report

- In order to verify the member eligibility, select the “Member Verification” submodule from the Eligibility module.

**Eligibility - Member Verification**

\* Member ID:

(OR)

\* Last Name:

First Name:

SSN:

\* Gender: None Selected

Health Plan:

\* Date of Birth:

Service Date: 02-12-2020

**Verify Eligibility** **Report Eligibility Discrepancy** **Clear All**

**Eligibility**

- Assessments
- Report Eligibility Discrepancy
- Member Verification**

- The first way to search for the member is to enter as much of the Member ID as possible.
- Click the “Verify Eligibility” to see the results.

Eligibility - Member Verification

\* Member ID: 12346546549  
(OR)

\* Last Name:   
First Name:   
SSN:   
\* Gender: None Selected

Health Plan:   
\* Date of Birth:   
Service Date:

Verify Eligibility Report Eligibility Discrepancy Clear All

Details	Member ID	Name	Gender	Date of Birth	Member SSN	Health Plan	Provider ID	Name	Other Coverage?	Resp. Code	Policy #	HP Status	PCP Status
	12346546549	DOE JANE	F	01-01-1970	111111111	BNDS	4589745630	SPARROW JACK	No			Active	Active

- The second way to search for the member is to enter as much information as possible in the highlighted fields below.
- Note the required fields are the Last Name, Date of Birth, and Gender.
- Click the “Verify Eligibility” to see the results.

Eligibility - Member Verification Back

\* Member ID:

(OR)

\* Last Name:  Health Plan:

First Name:  \* Date of Birth:

SSN:  Service Date:

\* Gender:

Details	Member ID	Name	Gender	Date of Birth	Member SSN	Health Plan	Provider ID	Name	Other Coverage?	Resp. Code	Policy #	HP Status	PCP Status
	12346546549	DOE JANE	F	01-01-1970	111111111	BNDS	4589745630	SPARROW JACK	No			Active	Active

- Click on the magnifying glass to bring up the details on the member.
- Here you can see Health Plan details, Effective from date, PCP details, PCP Effective from date, and Benefit details.

Details

### Member Details

**Doe, Jane** Active - PROVISIONAL

<b>Member ID:</b>	12346546549	<b>Gender:</b>	Female	<b>Benefit Code:</b>	040-1	<b>PCP ID:</b>	4589745630	<b>Specialty:</b>	GENERAL PRACTICE	<b>NPI:</b>	9743761360
<b>Date Of Birth:</b>	01-01-1970	<b>Age:</b>	53.788 yrs	<b>Eff From:</b>	01-02-2019	<b>Eff From:</b>	01-01-2019	<b>Organization:</b>	JACK SPARROW DOCTORS SERVICE	<b>Tax ID:</b>	99-9999999
<b>Health Plan:</b>	Brand New Day	<b>LOB:</b>	MEDICARE	<b>Eff To:</b>		<b>Address:</b>	4523 First Ave, Los Angeles, CA, 90001, Us				
<b>Language:</b>	English	<b>Address:</b>	6119 E Washington Blvd Ste 201, Commerce, CA, 90040			<b>Address:</b>	4523 First Ave, Los Angeles, CA, 90001, Us				
<b>Other Coverage:</b>	No		(555) 555-5555 (555) 555-5555			<b>Address:</b>	4523 First Ave, Los Angeles, CA, 90001, Us				
						<b>Address:</b>	4523 First Ave, Los Angeles, CA, 90001, Us				
						<b>Address:</b>	4523 First Ave, Los Angeles, CA, 90001, Us				
						<b>Address:</b>	4523 First Ave, Los Angeles, CA, 90001, Us				

Basic Information

Copay/Coinsurance

Detail Option Maintenance

Quality

Other Information

User Defined Fields

Benefit Code Details			
Benefit Code	Emp Group	Benefit From	Benefit To
040-1		01-02-2019	

PCP Details			
ID	Name Organization	From Date To Date	Contact Details
4589745630	SPARROW JACK JACK SPARROW DOCTORS SERVICE	01-01-2019	4523 FIRST AVE, LOS ANGELES, CA, 90001 (555) 555-5555 (323) 798-3029

Other IDs Details	

Site Details

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➤ Click on the Copay/Coinsurance tab to see member benefit details.

Basic Information **Copay/Coinsurance** Detail Option Maintenance Quality

Select Benefit Period: 040-1 - 01/01/2020 - 12/31/2020

**Member Details**

**Doe, Jane** Active - PROVISIONAL

**Sparrow, Jack (PCP)**

Member ID: 12346546549 Gender: Female Benefit Code: 040-1 PCP ID: 4589745630 Specialty: GENERAL PRACTICE NPI: 9743761360  
 Date Of Birth: 01-01-1970 Age: 53.788 yrs Eff From: 01-02-2019 Eff From: 01-01-2019 Tax ID: 99-9999999  
 Health Plan: Brand New LOB: MEDICARE Eff To: Organization: JACK SPARROW DOCTORS SERVICE  
 Day Address: 6119 E Washington Blvd Ste 201, Commerce, CA, 90040 Address: 4523 First Ave, Los Angeles, CA, 90001, Us  
 Language: English Other Coverage: No (555) 555-5555 (555) 555-5555 (555) 555-5555 (323) 798-3029

Basic Information **Copay/Coinsurance** Detail Option Maintenance Quality Other Information User Defined Fields

Select Benefit Period: 040-1 - 01/01/2020 - 12/31/2020

Benefits	Details	Copay \$	Coinsurance %	Utilization Range	Utilization Type
75 - URGENT CARE (VISIT), 77 - URGENT CARE FACILITY (OTHER), 78 - URGENT CARE PROFESSIONAL	General	-	-	-	-
45 - OTHER NON-SPECIFIED MEDICAL SERVICES	General	-	20.00 Per Line	-	-
85 - GLAUCOMA SCREENING	General	-	-	-	-
57 - PULMONARY REHABILITATION FACILITY	General	30.00 Per Day	-	-	-
104 - INDIVIDUAL THERAPY - MENTAL HEALTH SPECIALIST, 105 - GROUP THERAPY - MENTAL HEALTH SPECIALIST	General	-	20.00 Per Line	-	-
107 - INDIVIDUAL THERAPY - PSYCHIATRIST, 108 - GROUP THERAPY - PSYCHIATRIST	General	40.00 Per Day	-	-	-
5 - PART B DRUGS, 6 - TRANSPLANT PART B DRUGS, 7 - CHEMOTHERAPY DRUGS	General	-	20.00 Per Line	-	-

Benefit Level	Member Deductible		Subscriber Deductible		Member MOOP		Subscriber MOOP	
	Limit	Accum	Limit	Accum	Limit	Accum	Limit	Accum
In-N/W	Limits not configured.				\$6700.00	\$0.00	-	\$0.00
Out-N/W	-				-	\$0.00	-	\$0.00
Combined	-				-	\$0.00	-	\$0.00

➤ Click on the Detail Option Maintenance tab to see additional member benefit details.

Basic Information Copay/Coinsurance Detail Option Maintenance Quality

Select Benefit Period: 040-1 - 01/01/2020 - 12/31/2020

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**Member Details**

**Doe, Jane** Active - PROVISIONAL

Member ID: 12346546549 Gender: Female Benefit Code: 040-1

Date of Birth: 01-01-1970 Age: 53.788 yrs Eff From: 01-02-2019

Health Plan: Brand New Day LOB: MEDICARE Eff To:

Language: English Address: 6119 E Washington Blvd Ste 201, Commerce, CA, 90040

Other Coverage: No (555) 555-5555 (555) 555-5555

**Sparrow, Jack (PCP)**

PCP ID: 4589745630 Specialty: GENERAL PRACTICE NPI: 9743761360

Eff From: 01-01-2019 Eff To: Tax ID: 99-9999999

Organization: JACK SPARROW DOCTORS SERVICE

Address: 4523 First Ave, Los Angeles, CA, 90001, Us

(555) 555-5555 (323) 798-3029

Basic Information Copay/Coinsurance Detail Option Maintenance Quality Other Information User Defined Fields

Select Benefit Code Period: 040-1 - 01/01/2019 - ACTIVE

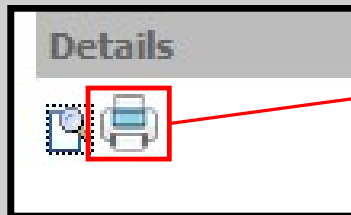
**Detail Option Maintenance**

Description	Effective From	Effective To	Benefits	Details	Copay \$	Coinsurance %	Utilization Range
215 - DRUGS	01-01-2019	01-01-2019	5 - PART B DRUGS, 6 - TRANSPLANT PART B DRUGS, 7 - CHEMOTHERAPY DRUGS	General	-	20.00 Per Line	-
216 - OUTPATIENT SURGICAL SERVICES	01-01-2019	01-01-2019	28 - AMBULATORY SURGICAL CENTER, 29 - OUTPATIENT HOSPITAL SURGICAL/OBSERVATION	General	-	20.00 Per Line	-
217 - AMBULANCE SERVICES	01-01-2019	01-01-2019	2 - AMBULANCE - AIR, 3 - AMBULANCE - GROUND TRIPS, 4 - AMBULANCE - GROUND OTHER	General	-	20.00 Per Line	-
218 - SKILLED NURSING FACILITY INPATIENT	01-01-2019	01-01-2019	58 - SKILLED NURSING FACILITY INPATIENT	Hospital Admission - SNF COPAY	0.00 Per Day	-	21 - 100 Per Day
218 - SKILLED NURSING FACILITY OUTPATIENT	01-01-2019	01-01-2019	58 - SKILLED NURSING FACILITY OUTPATIENT	Hospital Admission - SNF	170.50 Per Day	-	1 - 20

Benefit Code - 040-1 (EMBR...) - MOOP (From: 01-01-2023 To: 12-31-2023)

Benefit Level	Member Deductible		Subscriber Deductible		Member MOOP		Subscriber MOOP	
	Limit	Accum	Limit	Accum	Limit	Accum	Limit	Accum
In-N/W	Limits not configured.				\$6700.00	\$0.00	-	\$0.00
Out-N/W	Limits not configured.				-	\$0.00	-	\$0.00
Combined	Limits not configured.				-	\$0.00	-	\$0.00

- Click on the printer icon to bring up the dialog to save a copy and print.



Find... 1 of 2 100%

Main Report

### Member Print Report

Member Details:			
Member ID:	12346546549	First Name:	JANE
Last Name:	DOE	Middle Name:	
Gender:	F	Suffix:	
Member SSN:	111111111	Birth Date:	01/01/1970
Member Status:		Age:	50.11
		Patient ID:	

Member Address Details:			
Address1:	6119 E Washington Blvd ste 201		
Address2:			
City:	commerce	State:	CA
Zip:	90040	County:	
Phone:	5555555555	Fax:	5555555555

PCP Information:			
PCP ID:	4589745630		
PCP Name:	JACK SPARROW		
PCP From Date:	01/01/2019	PCP To Date:	
Address1:	6119 E WASHINGTON BLVD STE 201		
Address2:			
City:	COMMERCE	State:	CA
Zip:	900402452	Maintenance:	
Phone:		Fax:	3237391130



- There are two cases where this sub-module should be used: The member is confirmed eligible from the Health Plan but ( 1 ) does not show in the system, or ( 2 ) An existing member shows as not active with the Health Plan at the time.
- In the event of a discrepancy within the Member’s Eligibility, there are two methods to report it directly.
- First, click on the “Report Eligibility Discrepancy” button next to the Verify Eligibility button previously used.

**Report Eligibility Discrepancy**

Eligibility - Member Verification

\* Member ID:

(OR)

Health Plan:

\* Date of Birth: 01-01-1970


Service Date: 02-12-2020

First Name:

SSN:

\* Gender: Female

Verify Eligibility **Report Eligibility Discrepancy** Clear All

Details	Member ID	Name	Gender	Date of Birth	Member SSN	Health Plan	Provider ID	Name	
	12346546549	DOE JANE	F	01-01-1970	111111111	BNDS	4589745630	SPARROW JACK	No

- A pop-up will appear requesting information regarding the member in question and the issues found.
- Please note the Type (of Request), Last Name, PCP Last Name, Member ID, Health Plan, Gender, Date of Birth (DOB), and Effective Date are required fields.

The screenshot shows a web form titled "Report Eligibility Discrepancy". The form contains several input fields and buttons. A red box highlights the "\*Type:" dropdown menu, which is open to show three options: "Member Not Exists", "Member Not Exists", and "Update Eligibility". Another red box highlights the "\*Gender:" dropdown menu, which is open to show three options: "Male", "Male", and "Female", with "Other" also visible. A third red box highlights the "\*Effective Date:" field, which is a date picker. A fourth red box highlights the "\*DOB:" field, which is a date picker. A fifth red box highlights the "\*Member ID:" field. A sixth red box highlights the "\*Health Plan:" field. A seventh red box highlights the "Save" and "Reset" buttons. A callout box on the left contains the text "Report Eligibility Discrepancy". A callout box at the bottom right shows a calendar for February 2020, with the date 12 highlighted. A red arrow points from the calendar to the "\*Effective Date:" field.

**Report Eligibility Discrepancy**

\*Type: Member Not Exists

\*Last Name:

\*PCP Last Name:

Benefit Code:

Proof of Eligibility:  No file selected.  
[Max file size 256M]

\*Member ID:

First Name:

\*Health Plan:

\*Gender: Male

\*DOB:

\*Effective Date:

Notes:

?	February, 2020							x
	<<	<	Today	>	>>			
wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
4							1	
5	2	3	4	5	6	7	8	
6	9	10	11	12	13	14	15	
7	16	17	18	19	20	21	22	
8	23	24	25	26	27	28	29	

- If documentation of the discrepancy is available, click the browse button to open the File Upload window.
- Find the document and click the Open Button to attach.

The image shows a 'Report Eligibility Discrepancy' form and a 'File Upload' dialog box. The form has the following fields:

- \*Type: Member Not Exists (dropdown)
- \*Member ID: (text input)
- \*Gender: Male (dropdown)
- \*Last Name: (text input)
- \*PCP Last Name: (text input)
- Benefit Code: (text input)
- Proof of Eligibility: Browse... No file selected. (Max file size 256M)
- Notes: (text area)
- Save (button)

The 'File Upload' dialog box shows the following details:

- Path: This PC > Documents > Custom Office Templates
- File name: Sample Elig Documentation
- Date modified: 2/6/2020 9:51 AM
- Type: Microsoft Word D...
- Size: 12 KB
- File type: All Files
- Buttons: Open, Cancel

Red arrows indicate the flow from the 'Browse...' button in the form to the 'Sample Elig Documentation' file in the dialog, and then to the 'Open' button.

- The document will now show in the dialog box.
- Once completed, click the Save button.
- The notification “Record added successfully” will appear at the top, center of the window.
- The pop-up window can now be closed.

**Report Eligibility Discrepancy**

\*Type: Member Not Exists  
\*Last Name: DOE  
\*PCP Last Name: STARK  
Benefit Code: 024  
Proof of Eligibility: **Browse...** Sample Elig Documentation.docx  
[Max file size 256M]

\*Member ID: 124876325A  
First Name: JOHN  
\*Health Plan: BND  
Notes: MEMBER WAS ADDED AT THE BEGINNING OF THE MONTH.

\*Gender: Male  
\*DOB: 01-01-1960  
\*Effective Date: 02-01-2020

**Save** **Reset**

**Report Eligibility Discrepancy**

**Record added successfully.**

\*Type: Member Not Exists  
\*Member ID:  
\*Last Name:  
First Name:  
\*Gender: Male  
\*DOB:

- The second method is to select the “Report Eligibility Discrepancy” submodule from the Eligibility module.
- Please note the highlighted Box 1 matches the previous method but rearranges the placement of the boxes.
- Highlighted Box 2 shows the options to search and filter previous discrepancy submissions.
- Note in highlighted Box 3, the example of the previous method is showing as a discrepancy.

The screenshot displays the 'Eligibility Discrepancy' web application interface. On the left is a navigation menu with categories: Authorization/Referral, Capitation, Claims, Communication, Customer Service, EDI Services, Eligibility, Assessments, Report Eligibility Discrepancy, Member Verification, and Information. The 'Eligibility' category is expanded, and 'Report Eligibility Discrepancy' is highlighted in Box 1.

The main content area is titled 'Eligibility Discrepancy' and contains two primary sections:

- Add/Edit Eligibility Discrepancy (Box 1):** This form includes fields for \*Type (set to 'Member Not Exists'), \*Member ID, \*Last Name, \*First Name, \*Health Plan, \*Effective Date, \*Gender (set to 'Male'), \*PCP Last Name, and Status (set to 'Pending'). It also features a 'Notes' field, a 'Proof of Eligibility' upload button, and 'Save' and 'Clear All' buttons.
- Search Eligibility Discrepancy (Box 2):** This search interface includes filters for Select Type, Member ID, First Name, Last Name, PCP Last Name, Health Plan, Select Created By, and Select Status. It also has 'Created Date From' and 'Created Date To' date pickers, along with 'Search' and 'Clear All' buttons.


Below these forms is a table listing existing discrepancies:

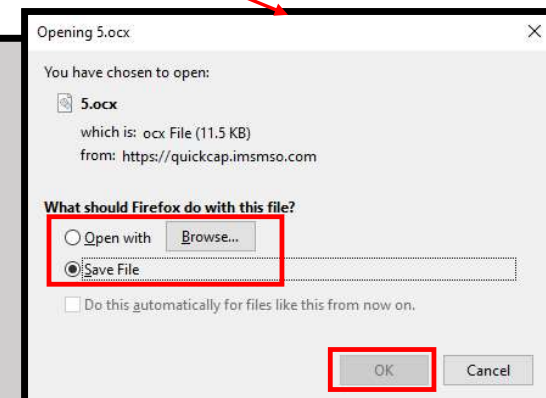
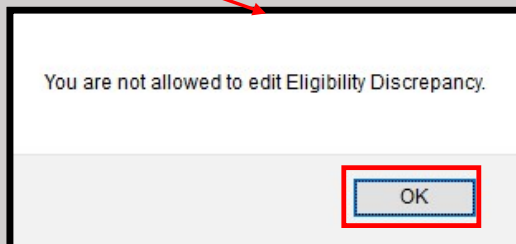
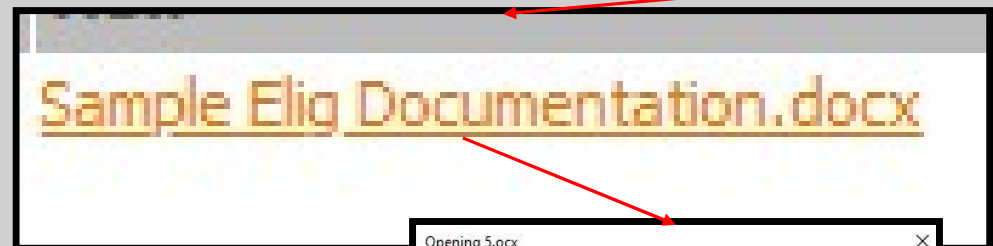
Edit	Type	Member ID	Last Name	First Name	DOB	Gender	Health Plan	Effective Date	PCP Last Name	Benefit Code	Note	Status	Created By	Created Date	View
	Member Not Exists	124876325A	DOE	JOHN	01-01-1960	Male	BND	02-01-2020	STARK	024	MEMBER WAS ADDED AT THE BEGINNING OF THE MONTH.	Pending	TEST ADMIN 1	02-12-2020	<a href="#">Sample Elig Documentation.docx</a>

Box 3 highlights three callout boxes:

- A callout box pointing to the 'Report Eligibility Discrepancy' menu item.
- A callout box pointing to the 'Select Type' dropdown menu, which lists 'Select Type', 'Member Not Exists', and 'Update Eligibility'.
- A callout box pointing to the 'Select Status' dropdown menu, which lists 'Select Status', 'Pending', 'In progress', 'Rejected', and 'Completed'.

- There are two clickable items in this section.
- The edit button is for internal use only and will display the message shown below.
- In the “View” area, any attached documents will be displayed. Clicking on it will allow the document to be opened or saved.

Edit	Type	Member ID	Last Name	First Name	DOB	Gender	Health Plan	Effective Date	PCP Last Name	Benefit Code	Note	Status	Created By	Created Date	View
	Member Not Exists	124876325A	DOE	JOHN	01-01-1960	Male	BND	02-01-2020	STARK	024	MEMBER WAS ADDED AT THE BEGINNING OF THE MONTH.	Pending	TEST ADMIN 1	02-12-2020	<a href="#">Sample Elig Documentation.docx</a>



- As the discrepancy is being investigated the Status will be updated to “In Progress.”
- Once resolved, the Status will be shown as “Completed.”

Edit	Type	Member ID	Last Name	First Name	DOB	Gender	Health Plan	Effective Date	PCP Last Name	Benefit Code	Note	Status	Created By	Created Date	View
	Member Not Exists	124876325A	DOE	JOHN	01-01-1960	Male	BND	02-01-2020	STARK	024	MEMBER WAS ADDED AT THE BEGINNING OF THE MONTH.	In progress	TEST ADMIN 1	02-12-2020	<a href="#">Sample Elig Documentation.docx</a>

In progress

Edit	Type	Member ID	Last Name	First Name	DOB	Gender	Health Plan	Effective Date	PCP Last Name	Benefit Code	Note	Status	Created By	Created Date	View
	Member Not Exists	124876325A	DOE	JOHN	01-01-1960	Male	BND	02-01-2020	STARK	024	MEMBER WAS ADDED AT THE BEGINNING OF THE MONTH.	Completed	TEST ADMIN 1	02-12-2020	<a href="#">Sample Elig Documentation.docx</a>

Completed