

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 Queues in OnBase.

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

Step 3: Revenue Collections Keywords all documents in the 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.

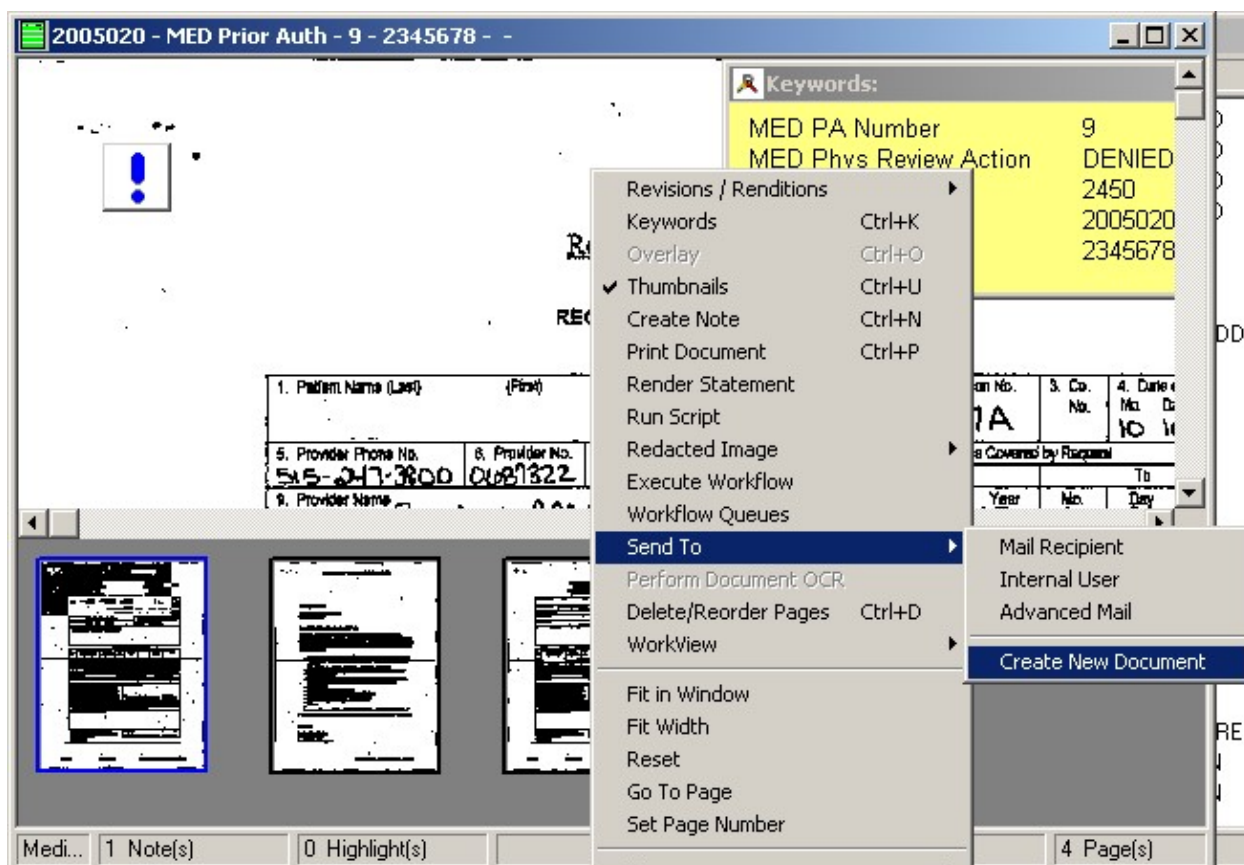
Step 8: The Revenue Collections Quality Analysis (Q.A.) staff member reviews 3% of all documents keyworded and completes a Keywording Audit Form.

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.)

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

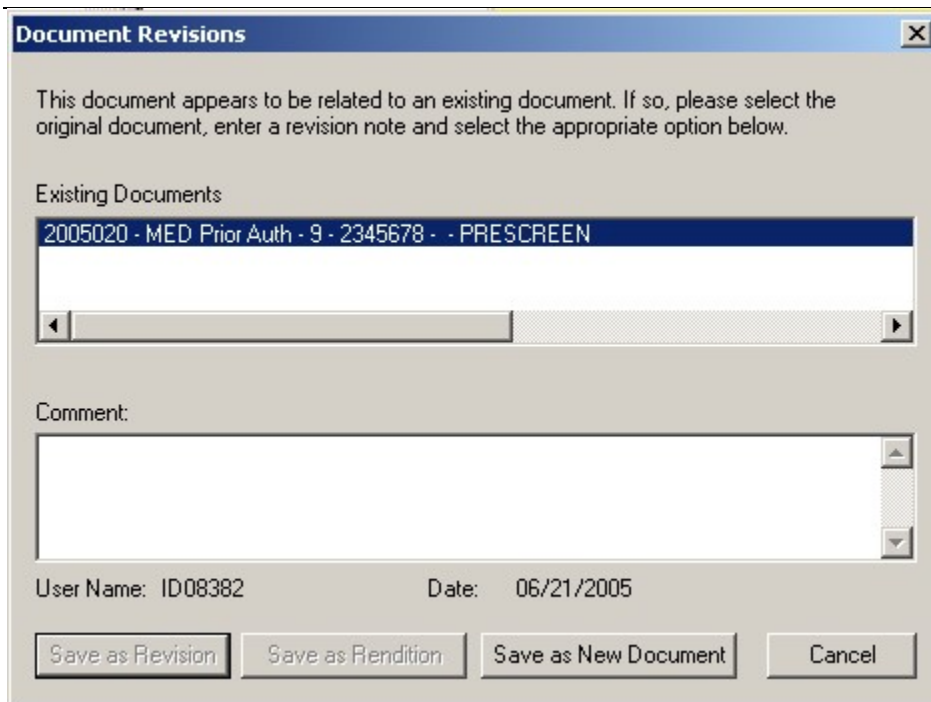
Date Routed / /

DCN

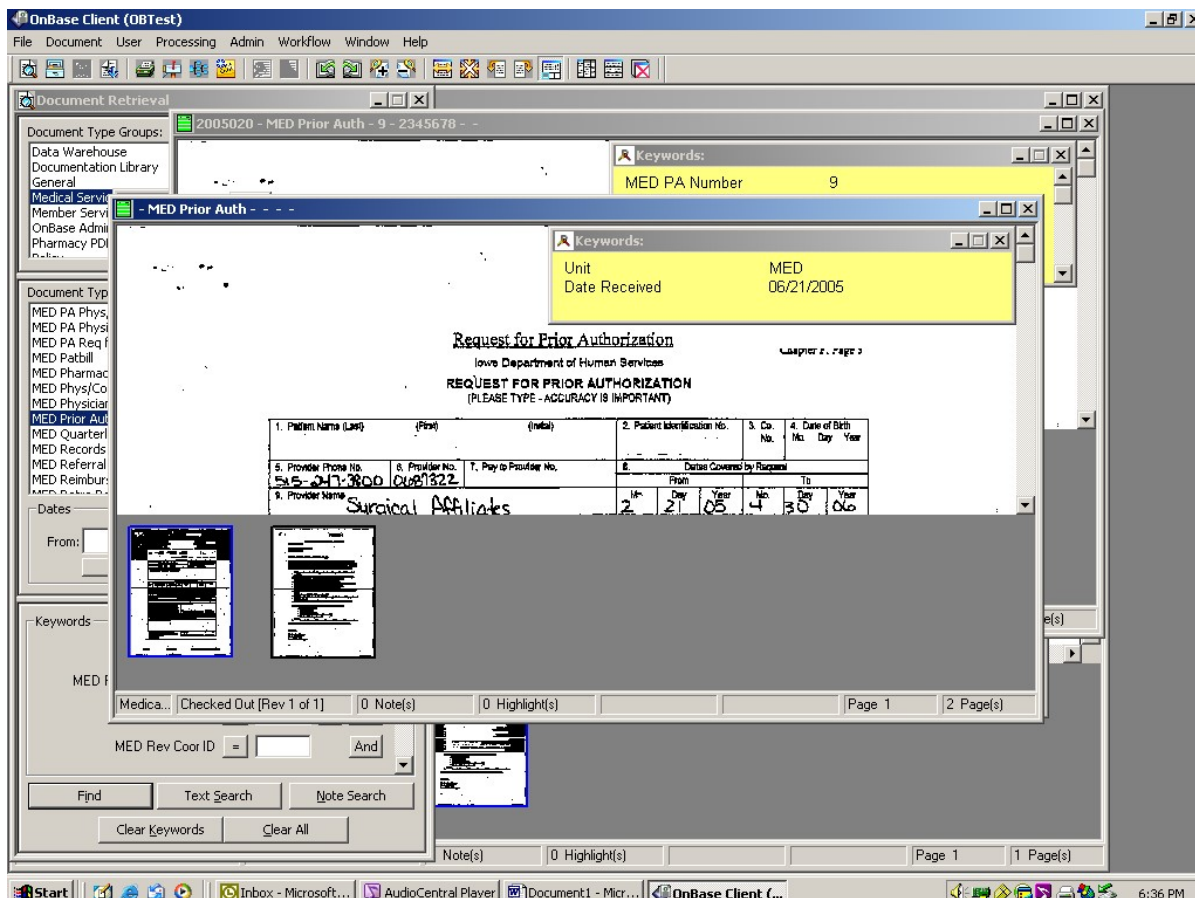
Denial Reason

OK Clear Keywords Cancel

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



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 (OBProd) interface. The main window is titled "Workflow" and shows a list of documents on the left and a preview of a document on the right. The document list includes:

- CHK02 - Undelivered Checks LC
- Correspondence Research - REV
- Returned Adjustments
- REV01 - Revenue Work LC
 - REV01 - Provider Overpayment [196]
 - REV01 - TPL [9]
 - REV01 - Lien Recovery [63]
 - REV01 - Estate/Miller Trust [15]
 - REV01 - Iowa Care Premiums [0]
 - REV01 - Faxes [16]
 - REV01 - My Desk Pending [0]
 - REV01 - Rerouted Correspondence [75]
 - REV01 - Special Handle [0]
 - REV01 - Unit Lead [1]
 - REV01 - Completed [39659]
 - REV01 - Recycle Bin [138]

The document preview shows a letter from American Family Insurance Group, dated June 8, 2006. The letter is addressed to the State of Iowa, PO Box 30460, Des Moines, IA 50315. The patient name is [REDACTED], date of birth is August 17, 2004, and the account number is 001782008 - Patient. The letter contains a request for information regarding a medical authorization and includes a signature from David J. Gemma, Casualty Claims Analyst.

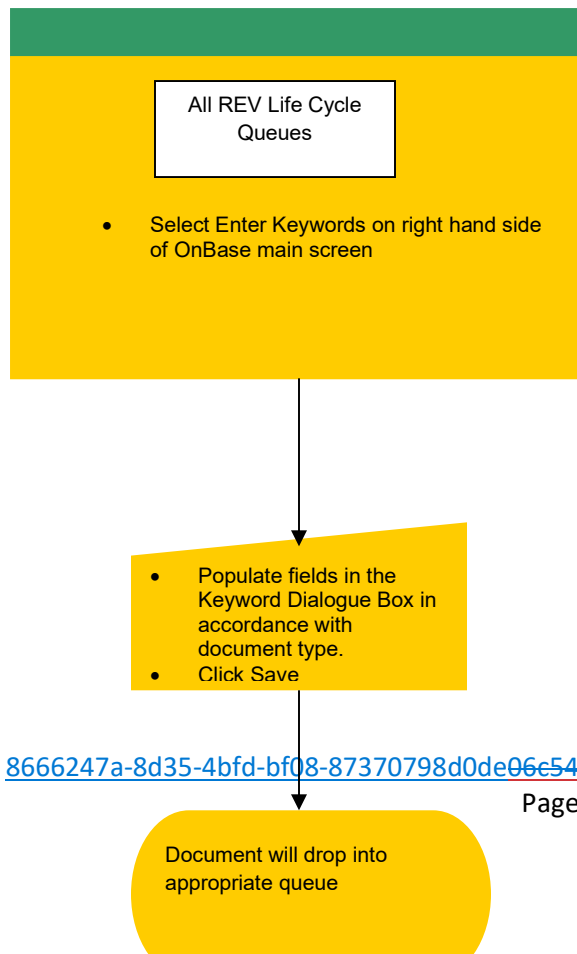
The bottom of the interface shows a "Keywords:" field with three document thumbnails and a status bar indicating "General Volume 36 Copy 1", "Checked Out", "0 Note(s)", "0 Highlight(s)", "Page 1", and "3 Page(s)".

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