

## **MEM - Member Requests for Claims History**

### **Purpose:**

This procedure explains the process of how to handle a member's call requesting a claims history.

### **Identification of Roles:**

Customer Service Representatives (CSR)  
Administrative Assistance (AA)

### **Performance Standards:**

95% of Claims History Requests responded to within 5 business days. 100% responded to within 7 business days.

### **Path of Business Procedure:**

Step 1: Requests come by three different routes:

- a. Calls are routed by an Automatic Call Distributor (ACD) into a Publications queue.
- b. Written correspondence is scanned into OnBase Workflow (see OnBase procedures)
- c. E-mail inquiries into the website.

Step 2: The CSR will create a Contact Log for each caller. (See Contact Log procedures)

Step 3: The CSR will verify the caller. (See Verification Procedures)

- a. If the caller is not a member, advise the caller that they are not authorized on the member's account and therefore the CSR is unable to process their request. The call will be documented in the Contact Log. Process complete.
- b. If the caller is a member, proceed to Step 4.

Step 4: The CSR will verify with the caller what the month and year/s of claims history they are requesting.

- a. On the contact log click on the 'History request' button.
- b. Enter in the dates the member is requesting the claims history for on the e-form then click 'Submit.'
- c. You may now complete your Contact Log. (See Contact Log procedures)

Step 5: The AA will access Workflow.

Step 6: The AA will click on the 'MEM02 – Submit History Request' folder to begin processing the history requests. When clicking on this folder, the first request form will automatically open.

Step 7: The AA will review the Member History Request form to verify all information is in the form.

Step 8: The AA will enter information into the MMIS subsystem 15 (Miscellaneous Functions).

- a. Enter an 'I' in 'Action Code' and tab to 'Member History RPT REQ' and place an "X".
- b. Input the Member State ID in the 'RECIP ID' field and press the enter key once. The member name should automatically populate.

Step 9: If the cursor is not at the 'First Date of SVC filed', the AA will tab to this section.

- a. Enter the begin date the member requested in 2 digit month, 2 digit day and 2 digit year.

Step 10: The AA will enter the 'Last Date of SVC' as 2 digit month, 2 digit day and 2 digit year then press enter.

Step 11: In Workflow, the AA will select the task 'Request Submitted.'

Step 12: The following day, the AA will click on the 'MEM02 – Process History Request' folder to complete processing the history request.

Step 13: The AA will click on one of the request to bring up the e-form then click 'Create Letter.'

Step 14: The AA will review the letter to make sure that all of the information is correct and click the 'X' in the corner of the letter once completed.

Step 15: A message will come up stating that the letter has been successfully created and attached to the document. The question 'is that ok?' will populate. The AA will select 'Yes.' The letter is now completed.

Step 14: The AA will print out the history request letter from cold reports (IAMC9820-R002) and prepare it for mailing.

### **Forms/Reports:**

IAMC9820-R002

History Request E-form

### **RFP References:**

#### **Interfaces:**

MMIS subsystem 15 (Miscellaneous Functions).OnBase Workview

OnBase Workflow

### **Attachments:**

N/A