MEM – Supplemental Insurance Questionnaire

Purpose:

To explain how Customer Service Representatives (CSRs) should request to move, add, or modify Third Party Liability (TPL) on a member's file.

Identification of Roles:

Customer Service Representative (CSR)

Performance Standards:

Quality Assurance for all Member Service's calls must be at least 85%.

Path of Business Procedure:

NOTE: All referenced procedures can be found in the Member Services share folder: \\Dhsime\MEMSRV

Step 1: Customer Service Representative (CSR) accesses the member's file and will verify that the caller is Health Insurance Portability and Accountability Act of 1996 (HIPAA) authorized to obtain information and make changes to the member's file

a. Verify the person calling is listed as the member, the case name or the name in Social Services Number Information (SSNI)
b. Verify the mailing address on file
c. Request the caller's current phone number

Step 2: Verify (using the Searching for Member Documents in Workview/workflow procedures) if another CSR has recently requested a SIQ for the member in question

Step 3: If the caller is requesting to remove TPL:

a. Create contact log (See Creating and Completing Contact Log procedures)
b. Enter all ID numbers as explained in Step 8 of the Creating and Completing Contact Log procedures
c. Verify TPL (see Verifying TPL procedure)
d. Click on the Create SIQ button on the contact log.
e. After you click the Create SIQ button an ADO Security Warning box will pop up. Click OK.
f. Click TPL Removal in the gray box at the top of the SIQ form.
g. Copy and paste from the TPL Resource Display Screen (See Verify TPL procedures) the following information into the SIQ form:
    i. The Policy Holder's name and Social Security Number.
    ii. The name of the TPL

iii. The TPL phone number
iv. The address for the TPL
v. The group number
vi. The policy number
vii. The effective date that policy was terminated.

h. Ask the caller for the birth date of the policyholder and type that into the DOB field.
i. The next section of the SIQ form is the Coverage Types. Click each coverage type that is listed on the TPL Resource Display Screen.
j. The Member Information section will have all of the member's ID numbers that you entered into the contact log. All you need to do is select the member's relationship to the policyholder.
k. Once all required information has been filled out in all the required fields then press Submit Request
l. A box will pop up saying Form creation successful. Click Ok.

Step 2: If the caller is requesting to add TPL.

a. Create contact log. (See Creating and Completing Contact Log procedures)
b. Enter all the ID numbers as explained in Step 8 in the Creating and Completing Contact Log procedures.
c. Click on Create SIQ button on contact log.
d. After you click the Create SIQ button an ADO Security Warning box will pop up. Click OK.
e. Click TPL Add in the gray box at the top of the SIQ form.
f. Verify all new insurance information with caller.
   i. The Policy Holder's name, Social Security Number and Date of Birth.
   ii. The name of the TPL
   iii. The TPL phone number
   iv. The address for the TPL
   v. The group number
   vi. The policy number
   vii. The effective date policy became active.
g. The next section of the SIQ form is the Coverage Types. Click each coverage type that applies to the new insurance being added.
h. The Member Information section will have all of the member's ID numbers that you entered into the contact log. All you need to do is select the member's relationship to the policyholder.
i. Once all required information has been filled out in all the required fields then press Submit Request
j. A box will pop up saying Form creation successful. Click Ok.

Step 3: If the caller is requesting to change an existing TPL.

a. Create contact log. (See Creating and Completing Contact Log procedures)
b. Enter all the ID numbers as explained in Step 8 in the Creating and Completing Contact log procedures.

c. Verify TPL. (See Verifying TPL procedure)
d. Click on Create SIQ on contact log.
e. Mark SIQ form as Modification.
f. After you click the Create SIQ button an ADO Security Warning box will pop up. Click OK.
g. Note the contact log as to what is being modified.
    i. Effective date
    ii. Change in coverage type(s)
    iii. Policy or Group number
h. The next section of the SIQ form is the Coverage Types. Click each coverage type that is listed on the TPL Resource Display Screen.
i. The Member Information section will have all of the member's ID numbers that you entered into the contact log. All you need to do is select the member's relationship to the policyholder.
j. Once all required information has been filled out in all the required fields then press Submit Request
k. A box will pop up saying Form creation successful. Click Ok.

Step 4: If a caller is requesting to remove TPL due to a RX issue, they are receiving a bill due to TPL or the request has been made more than once.

a. Create contact log. (See Creating and Completing Contact Log procedures)
b. Enter all the ID numbers as explained in Step 8 in the Creating and Completing Contact log procedures.
c. Verify TPL. (See Verifying TPL procedure)
d. Click on Create SIQ on contact log.
e. Check documents in contact log to verify if a SIQ form has been previously submitted.
f. Mark SIQ form as MSS Review and Removal.
g. After you click the Create SIQ button an ADO Security Warning box will pop up. Click OK.
h. Note the contact log as to why you are sending MSS Review.
    i. Unable to get RX
    ii. Receiving bills
    iii. Second, third request
i. The next section of the SIQ form is the Coverage Types. Click each coverage type only if the coverage types are needing removed.
j. The Member Information section will have all of the member's ID numbers that you entered into the contact log. All you need to do is select the member's relationship to the policyholder.
k. Once all required information has been filled out in all the required fields then press Submit Request
l. A box will pop up saying Form creation successful. Click Ok.

Step 5: If the caller is requesting to remove TPL for a HIPP or Absent Parent policy.

a. Create contact log. (See Creating and Completing Contact Log procedures)
b. Enter all the ID numbers as explained in Step 8 in the Creating and Completing Contact log procedures.
c. Verify TPL. (See Verifying TPL procedure)
d. Select Create SIQ on contact log.
e. Mark SIQ form as Absent Parent or HIPP.
f. After you click the Create SIQ button an ADO Security Warning box will pop up. Click OK.
g. Note contact log if an Absent Parent policy is being added or removed.
h. If adding an Absent Parent policy or HIPP policy verify all new insurance information with caller.
    i. The Policy Holder's name, Social Security Number and Date of Birth.
    ii. The name of the TPL
    iii. The TPL phone number
    iv. The address for the TPL
    v. The group number
    vi. The policy number
    vii. The effective date policy became active terminated.
i. Copy and paste information from TPL Resource screen to SIQ form if removing policy.
j. The next section of the SIQ form is the Coverage Types. Click each coverage type only if the coverage types are needing removed.
k. The Member Information section will have all of the member's ID numbers that you entered into the contact log. All you need to do is select the member's relationship to the policyholder.
l. Once all required information has been filled out in all the required fields then press Submit Request
m. A box will pop up saying Form creation successful. Click Ok.

Forms/Reports:
SIQ Form

RFP References:
N/A

Interfaces:
All referenced procedures can be found in the Member Services share folder:
[\\Dhsime\MEMSRV](\\Dhsime\MEMSRV)
MMIS
OnBase

Attachments:
N/A