QIO – HCBS Administrative Duty

Purpose:

To provide administrative support to the home and community-based services (HCBS) Quality Oversight Unit.

Identification of Roles:

Support staff - completes tasks and associated reporting as required by contract deliverables.

Operations manager - assigns tasks for support staff to complete, receives reports completed by support staff.

Path of Business Procedure:

Support staff supports the HCBS quality oversight team and HHS in a variety of ways.

This role conducts administrative duties as assigned under the direction of the operations manager to include but are not limited to:

- OnBase workflow and OBCRs
- OnBase logging
- Scheduling meetings and webinars
- Meeting agendas and minutes
- Mailing
- New hire onboarding and establishing network access
- Employee offboarding
- Form development and changes
- Monitor shared mailboxes including hcbsqi@dhs.state.ia.us and cnrs@dhs.state.ia.us

Support staff maintain an identified role in a number of tasks including conducting HCBS Member Surveys including the IPES and MFP surveys; provide administrative support and tracking for provider review activities using QPS and maintain the Master Provider File review dates and certification dates; upload; keyword; and route information in OnBase relating to New Provider Applications and Provider Reviews; route and track Provider Self-Assessments using SharePoint.

Path of Business Procedure - Form Development/Changes:

Step 1: The operations manager will initiate all new form development. All forms are saved in the original forms folder located on the shared drive. Once a form has been approved by the operations manager a template of the letter will be saved.

Step 2: Forms will be modified for the following reasons:

a. Add or change staff information.

b. Update IAC reference.

c. An update has been requested by the operations manager.

Step 3: All forms and letters are password protected in both the original and template form to maintain consistency within the letters.

Step 4: New forms must be approved and receive a form number from HHS. Example of forms: Provider Self-Assessment:

a. The 470-0050 Form Request and Specification form must be completed by either the account or operations manager for any new form. The form must be emailed to the Iowa Medicaid forms approval staff. Include a digital copy of the form and include the 470-0050 Form Request and Specification.

b. There is no specific timeframe for approvals to be completed. To check the status of a request, email Iowa Medicaid forms approval staff.

a. Additional modules may be required depending on the waiver/program the member receives.

Path of Business Procedure - Meetings and Minutes

Step 1: Support staff will send an email to all meeting attendees prior to meetings requesting any items to be added to the meeting agenda. Agenda items will be emailed to the support staff to be added to the agenda. Support staff will email all attendees a copy of the agenda one day prior to the meeting. Recurring meeting events use an agenda which is stored on the shared drive or on SharePoint:

Step 2: Support staff will review the agenda for spelling errors or mistakes and upload the minutes to SharePoint in the location noted above.

Step 3: Support staff will take minutes during the meeting as directed by the meeting facilitator or their manager. Minutes will be edited for grammar and accuracy.

Step 4: Support staff will notify the meetings attendees that the minutes are complete and include the location of the completed minutes.

Path of Business Procedure - OnBase Logging

Step 1: Support staff will check OnBase logging queue a minimum of 3 times a day.

Step 2: Support staff will enter key words for documents and assign the documents to the specialist handling the review for the specific provider.

a. Support staff will review documents in OnBase, researching using IoWANS, QPS, Complaints folder located on the DHSime drive or in OnBase to determine the correct keywords to assign to the document.

b. Support staff will make sure all documents are right side up and delete any blank pages before assigning to the specialist.

Step 3: Support staff will track the date of any review information received into the "Letter Tracking Spreadsheet". Review information will also be tracked in QPS Summary Tab by "Adding DCN" and entering DCN, DCN Date and DCN Details. Examples of items in logging may include:

a. <u>Review materials:</u> If the last item tracked in QPS was P10 or F10 (review notification), it can be assumed the documentation received is the requested review materials. In OnBase, Enter DCN Number, DCN date, and DCN Details, ie, "review materials". Attach the document in OnBase to the main DCN (P10 or F10) for the review. Also track the receipt of this info on the letter tracking spreadsheet for the current fiscal year.

b. <u>CAP materials:</u> If the last item tracked in QPS was a P13 or F13 (report to provider), it can be assumed the documentation received is the CAP. In OnBase, Enter DCN Number, DCN date, and DCN Details, ie, "CAP". Attach the document in OnBase to the main DCN (P10 or F10) for the review. Also track the receipt of this info on the letter tracking spreadsheet for the current fiscal year.

c. <u>Compliance materials:</u> If last item tracked in QPS was a P19 or F19 (Compliance Initiation), it can be assumed the documentation received is compliance materials. In OnBase, Enter DCN Number, DCN date, and DCN Details, ie, "Compliance materials". Attach the document in OnBase to the main DCN (P10 or F10) for the review. Also track the receipt of this info on the letter tracking spreadsheet for the current fiscal year.

d. <u>Provider Acknowledgement:</u> Search in QPS for the active or most recent review. Enter DCN Number, DCN date, and DCN Details, ie, "Provider Acknowledgement". Attach the document in OnBase to the main DCN (P10 or F10) for the review.

e. <u>Documentation received for Complaints or Targeted Reviews</u>

    i. Check the share drive in the Complaints and Targeted Review folder for the provider name.

    ii. Once review type and specialist are determined, keyword the document with the appropriate identifiers.

f. <u>IPES Case Manager letters:</u> These are key worded as follows:

    i. Provider Name: This is the addressee on the letter (case manager).

    ii. State ID/Member Name: Look up this info in IoWANS.

iii. Review Type: "IPES Interviews".

iv. User ID: "Name".

g. Incident Reports: Double click the "Incident Reports" button to send to incident and complaints specialist.

Path of Business Procedure - OnBase Workflow, Changes, OBCRs

Step 1: Support staff, operations manager, and/or specialists will determine the need for an update to an OnBase workflow.

Step 2: Support staff will write up an OBCR e-form in OnBase by going to File; New; Forms; OBCR Form. The OBCR will need to be written step by step on how would like the new workflow to be created. This form will require some specific information to assist in prioritization for the OnBase team.

- Impact to Unit/Iowa Medicaid
- Volume of work

Step 3: An OBCR Process Document, detailing the business process will need to be attached to the OBCR prior to submitting your request. The process document used may be the workflow you have created for the new process you are requesting. If you do not have a workflow, the following is a sample of what needs included in your Process document.

Process Document Sample

The purpose of this document is to provide basic information on process documents for inclusion in a newly submitted OBCR.

Process Overview

Process documents are defined as any number of the following (list is not all-inclusive), provided they give enough information for the requirements to be clear and specific.

- Detailed business requirements
- Business process flow chart
- Business process documentation
- User guides
- Sample reports
- Input samples (from other systems)
- Output samples (to other systems)
- Letter templates
- E-form data field requirements
- User group permission levels

Note: The above are not technical documents, but business process documents which should already be available for the submitting unit's staff to be aware of the business process being performed.

Special Notes

There may be special items for this request, so be sure to include anything regarding exceptions or special circumstances for the work to be performed.

Step 4: Support staff will work closely with the OnBase team to answer any questions on the OBCR submitted to ensure the update is completed satisfactory to needs.

Step 5: Support staff will test the OBCR once completed to ensure the update is working properly with all functionality requested before OBCR can be put into production.