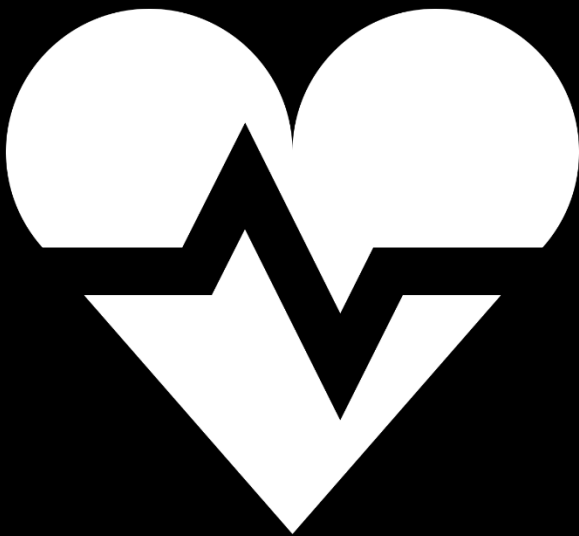


DXC Assure Claims

Medical Management

Release: v.19.3

October 2019



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All questions regarding this documentation should be routed through customer assistance, Blythewood, SC, on Phone: 800-420-6007 or Email: risksupp@dxc.com

General Overview

DXC Insurance RISKMASTER™ is now DXC Assure Claims

To keep abreast of technological changes in these times of digital disruption, DXC Technology has developed a digital-generation service delivery platform (Platform DXC™) that optimizes the delivery of DXC Technology's managed services fortified with automation and machine learning. This also necessitated unifying the product portfolio via a single-family name – DXC Assure, for global consistency within the context of DXC's brand guidelines.

Thus, with the deployment of DXC Technology's new service delivery platform – **Platform DXC**, and the latest **branding** directives, **DXC Insurance RISKMASTER™** becomes **DXC Assure Claims** auguring the company's digital intent – Digital Insurance as a Service (DlaaS).

[Click Here](#)

To access the Digital Transformation section in the Release Notes document for v.19.3 and know more.

Document Purpose

This document details the functional workflow of the Medical Management solution for capturing and creating records for an Employee's "encounters" of various visits to the medical health centers for different tests and procedures.

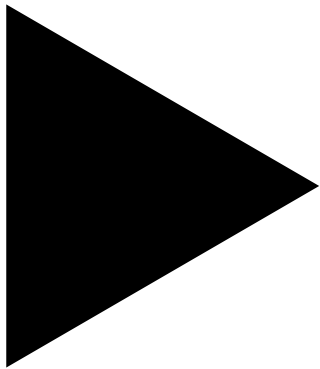
The Medical Management feature offers services to promote protect and restore each employee's health to facilitate optimal quality of life and maximum productivity in the workplace. Employees already dealing with chronic health conditions are encouraged to have regular health maintenance visits with their primary physician.

Important Information

This new feature involves additional cost/ consulting/ agreement/ licensing considerations. Hence, it is recommended to reach out to DXC Assure Claims Support or your DXC Assure Claims Sales Representative for more information.

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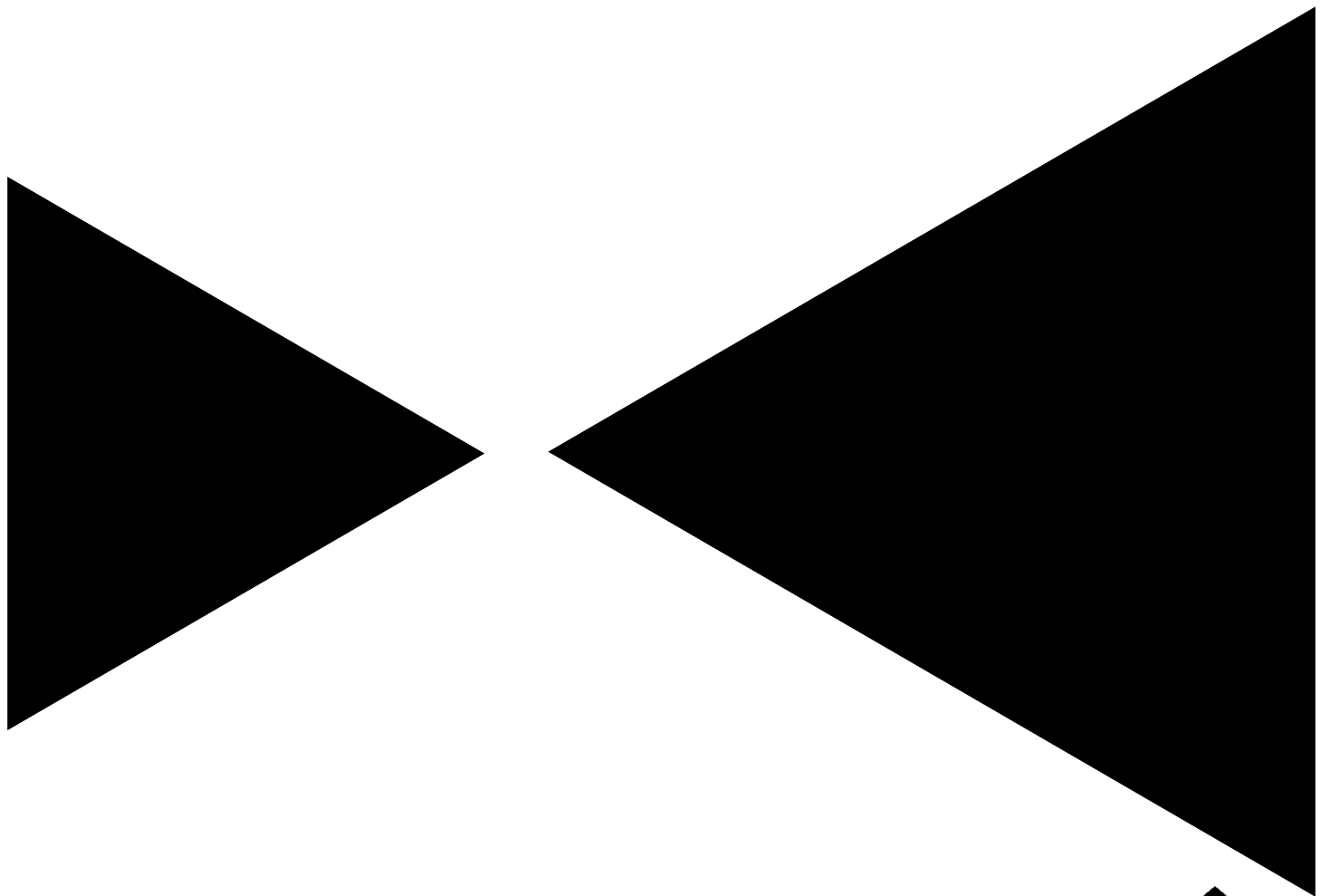
DXC Assure Claims

Document Name

Release: v.19.3

October 2019

Medical Management



Medical Management*

Enabling Medical Management

The DXC Assure Claims administrators can turn on Medical Management by selecting the newly added checkbox Use Medical Management via the following path in the Utilities zone:

Utilities > General System Parameter Setup > System Settings > General Parameters > **Use Medical Management**.

Accessing Medical Management

The Medical Management module in DXC Assure Claims v.19.3 can be accessed via:


- Employee Maintenance screen
- Event screen
- Claim screen
- Litigation screen
- Policy screen

Accessing Medical Management via	Breadcrumb Trail	Prerequisite SMS Settings Select the Employee Maintenance checkbox on the following path: Security > Security Management System > DataSources (expand) > Select DSN (expand) > Module Security Groups (expand) > Select User > on Module Security Permissions > RISKMASTER (expand) > ...
Employee Maintenance	Maintenance > Employee > Medical Management {on right-hand side (RHS) pane}	...> Employee Maintenance (expand) > Employee Maintenance (checkbox).
Events	Event > PI Employee > Medical Management (on RHS pane)	...> Event (expand) > Persons Involved (expand) > Employee Medical Management (checkbox)
General Claims	GC > PI Employee > Medical Management (on RHS pane)	...> General Claims (expand) > Persons Involved (expand) > Employee Medical Management (checkbox)
Workers' Compensation Claim	WC > PI Employee > Medical Management (on RHS pane)	...> Workers' Compensation Claims (expand) > Persons Involved (expand) > Employee Medical Management (checkbox)
Property Claims	PC > PI Employee > Medical Management (on RHS pane)	...> Property Claims (expand) > Persons Involved (expand) > Employee Medical Management (checkbox)
Vehicle Accident Claims	VA > PI Employee > Medical Management (on RHS pane)	...> Vehicle Accident (expand) > Persons Involved (expand) > Employee Medical Management (checkbox)
Health Claims	HC > Litigation > PI Employee > Medical Management (on RHS pane)	...> Health Claims (expand) > Persons Involved (expand) > Employee Medical Management (checkbox)
Litigation	GC > Litigation > PI Employee > Medical Management (on RHS pane)	...> General Claims (expand) > Litigation (expand) > Persons Involved (expand) > Employee Medical Management (checkbox)

	WC > Litigation > PI Employee > Medical Management (on RHS pane)	...> Workers' Compensation Claims (expand) > Litigation (expand) > Persons Involved (expand) > Employee Medical Management (checkbox)
	PC > Litigation > PI Employee > Medical Management (on RHS pane)	...> Property Claims (expand) > Litigation (expand) > Persons Involved (expand) > Employee Medical Management (checkbox)
	VA > Litigation > PI Employee > Medical Management (on RHS pane)	...> Vehicle Accident (expand) > Litigation (expand) > Persons Involved (expand) > Employee Medical Management (checkbox)
	HC > Litigation > PI Employee > Medical Management (on RHS pane)	...> Health Claims (expand) > Litigation (expand) > Persons Involved (expand) > Employee Medical Management (checkbox)
Policy	Claim > Policy > Person Involved > PI Employee > Medical Management This permission will need to be turned on for each Claim LOB for which Policy is applicable.	...> Policy Tracking > Person Involved > Employee Medical Management (checkbox)

Creating & Working with a (New) Medical Management Record

When all the above-mentioned SMS settings are enabled in DXC Assure Claims v.19.3, the Medical Management screen can be accessed from one of the afore mentioned screens.

As a case in point, Medical Management accessed via a General Claim is being considered in this document. [Fig. 1] To create a new Medical Management record, select the Add  icon from the right-hand pane.

Prerequisite SMS Permission

Select the checkbox labelled **Create New** under **Medical Management** to enable new record creation.

DXC Assure Claims v.19.3 screen



[Fig. 1]

Medical Management Screen

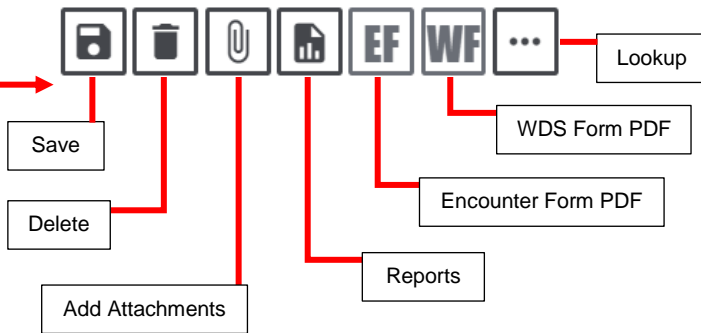
When the above-mentioned SMS settings is enabled, the Medical Management screen can be accessed via the Add icon. [Fig. 2]

DXC Assure Claims v.19.3 screen



[Fig. 2]

Medical Management Screen Components



The Medical Management (new) screen comprises the following default components:

- Standard toolbar
- Accordions
 - Encounter (Medical Management)
 - Encounter Form
 - Supplementals

Encounter (Medical Management) Accordion

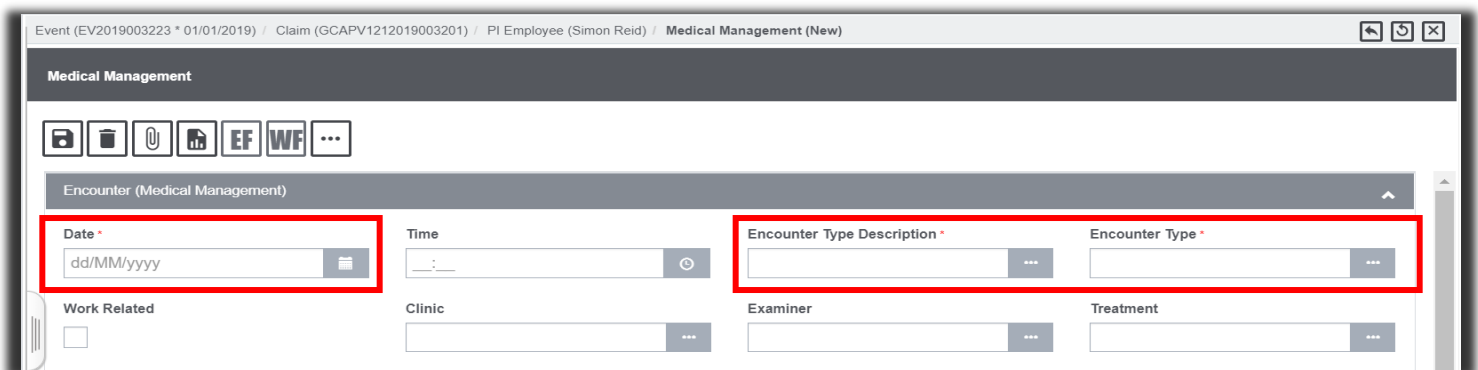
Screen Components & Their Functional Descriptions

The Encounter accordion [Fig. 3] consists of the following widgets, fields, checkboxes:

- | | | |
|-------------------------------|----------------------------|-------------------|
| ➤ Date* (mandatory) | ➤ Clinic | ➤ Examiner |
| ➤ Time | ➤ For Appointment | ➤ Treatment |
| ➤ Encounter Type | ➤ Work Related (checkbox) | ➤ Encounter Notes |
| ➤ Description* (mandatory) | ➤ Workers' Comp (checkbox) | |
| ➤ Encounter Type* (mandatory) | ➤ Attached To (read only) | |

To create a new Encounter, enter requisite data in the mandatory fields – **Date**, **Encounter Type Description** and **Encounter Type**. [Fig. 3]

DXC Assure Claims v.19.3 screen



[Fig. 3]

Automatic Addition of Accordions Based on “Encounter Type” Selection

For every selected **Encounter Type** (if SMS permission is enabled), two more accordions will get added on the screen –

- **Encounter Form**
- **Work Duty Status Form**

Besides these, an accordion specific to the selected Encounter Type also gets added.

For e.g.: When **Encounter Type** is “**Drug Testing**” [Fig. 4], then the additional accordions added to the screens will be:

- **Encounter Form**
- **Work Duty Status Form**
- **Drug Testing Data Entry.**

Note

For **Encounter Type** “**No Tab Details**”, only **Encounter Form** and **Work Duty Status Form** accordions are available (if permissions are enabled).

DXC Assure Claims v.19.3 screen

Event (EV2019003223 * 01/01/2019) / Claim (GCAPV1212019003201) / PI Employee (Simon Reid) / Medical Management (01/09/2019)

Medical Management

Encounter (Medical Management)

Date: 01/09/2019 | Time: 12:00 AM | Encounter Type Description: Blood Draw Blood Draw | Encounter Type: 1 Drug Testing

Work Related: | Clinic: ECO Express Care of Ocala | Examiner: | Treatment: | Worker's Comp: | Encounter Notes: | For Appointment: -- Please Select --

Attached To: Claim (GCAPV1212019003201)

Encounter Form | Work Duty Status Form | Drug Testing Data Entry | Supplementals

[Fig. 4]

Note

- The visibility of the **Encounter Form** and **Work Duty Status Form** accordions for every **Encounter Type** is controlled via SMS permissions.
- Based on SMS permissions, the above-mentioned forms can be turned off & the same can be enabled for another Encounter Type, say, Alcohol.
- The Encounter Date and Time will be copied over to Test Date and Time in selected Encounter Type's data entry accordion (**Except** for Encounter Type **Hepatitis B**).
- The dropdown, **For Appointment**, populates all new, scheduled & missed appointments for an employee.
 - The **No Appointments** option is used to create unscheduled Encounters.

Prerequisite SMS Permission

To enable the accordions, select the checkboxes:

- **Allow Access to Encounter Form**
- **Allow Access to Work Duty Status Form**

Working on an Existing Medical Management Record

Prerequisite SMS Permissions

An Existing Medical Management record can only be viewed and/or updated if the checkboxes **View & Update** are selected under SMS settings for Medical Management.

Note

- For existing records, the following fields on the Encounters (Medical Management) accordion will be **read only (un-editable)**:
 - **Encounter Type Description**
 - **Encounter Type**
 - **For Appointment**
- Barring the above, other Encounter details can still be modified.
- A new Encounter must be created for different Encounter Type to log any changes in read only fields mentioned above.

Deleting an Existing Medical Management Record

Prerequisite SMS Permissions

An Existing Medical Management record can only be deleted if the checkbox **Delete** is checked under SMS settings for Medical Management.

Note

- Users with SMS permissions can delete any Medical Management records by selecting the **Delete** button on top of screen.
- Medical Management records are soft-deleted and can be reinstated should any such need arise.
 - This means the DELETE_FLAG is set to -1 in tables instead of completely deleting the record

Encounter Form Accordion and Work Duty Status Form Accordion

The **Encounter Form** accordion and the **Work Duty Status Form** accordion are visible for every Encounter Type and access to these is controlled via SMS settings.

Condition for making Encounter Form available:

- The **Encounter Form** accordion is available for all Encounters.
- But, the **fields** of the **Encounter Form** accordion will only be accessible if the **Workers' Comp** checkbox is selected [Fig. 4] for a given **Encounter Type** on the in Encounter (Medical Management) accordion.
- If the **Workers' Comp** checkbox is unchecked, then the Encounter Form accordion displays the message – **“The Medical Management Form fields are available only for the Workers Comp encounters. Please check the workers comp checkbox on Medical Management Tab to access these form fields”**.
- The employee information on the above-mentioned accordions will be pulled from the master employee record in DXC Assure Claims database.
- Any changes made to employee's information on the Encounter Form and/or Work Duty Status Form will not change the employee's master record.
- In the **Work Duty Status Form**, the fields **Today's Date** and **Time In** are auto-populated with the current date and time of logging the Encounter Type.

Prerequisite SMS Permission

To enable the accordions, select the checkboxes:

- **Allow Access to Encounter Form** (checkbox node)
 - **Display Read Only** (checkbox)
 - **Update** (checkbox)
- **Allow Access to Work Duty Status Form** (checkbox node)

DXC Assure Claims v.19.3 screen

The screenshot displays the 'Medical Management' section of the DXC Assure Claims v.19.3 interface. The breadcrumb trail at the top reads: 'Event (EV2019003223 * 01/01/2019) / Claim (GCAPV1212019003201) / PI Employee (Simon Reid) / Medical Management (01/09/2019)'. The interface features a toolbar with icons for save, delete, print, and other actions, along with 'EF' and 'WF' buttons. Below the toolbar, there are three accordions: 'Encounter (Medical Management)', 'Encounter Form', and 'Work Duty Status Form'. The 'Work Duty Status Form' accordion is expanded, showing a form with the following fields: 'Today's Date' (29/09/2019), 'Time In' (10:37 AM), 'Employee Name' (Simon Reid), 'Time Out', 'Address', 'Social Security#' (###-##-6456), 'Country', and 'City'. A red rectangular box highlights the 'Today's Date' and 'Time In' fields.

[Fig. 5]

Various Encounter Types

Currently there are 8 different Encounter Types supported in DXC Assure Claims v.19.3. **[Fig. 6]**

For Medical Management permissions for a selected Encounter Type, say, Drug Testing, navigate the path: Security > Security Management System > DataSources (expand) > Select DSN (expand) > Module Security Groups (expand) > Select User > on Module Security Permissions > RISKMASTER (expand) > Employee Medical Management (expand) > Allow access to Drug Testing (expand) >

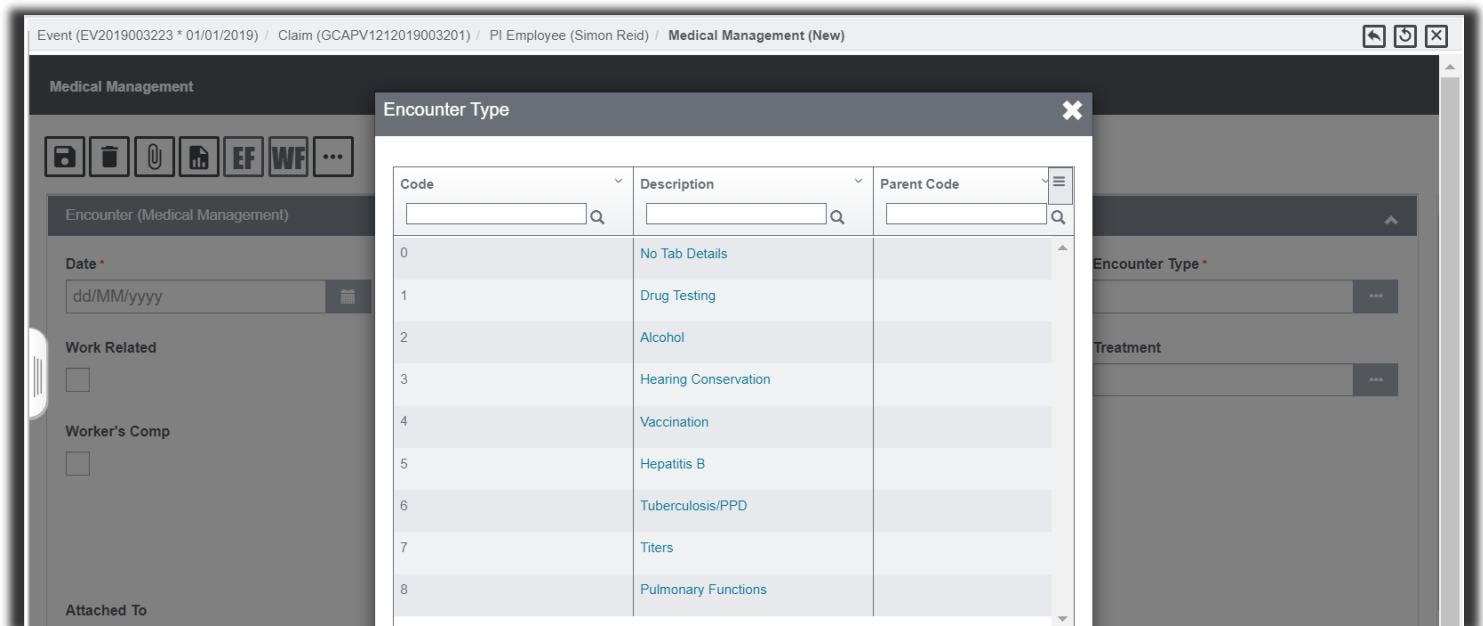
- Allow access to Encounter Form (checkbox)
 - Display Read-only (checkbox)
 - Update (checkbox)
- Allow access to Work Duty Status (checkbox)
 - Display Read-only (checkbox)
 - Update (checkbox)

Encounter Type Names

Supported Encounter Types are:

Drug Testing, Alcohol, Hearing Conservation, Vaccination, Hepatitis, Tuberculosis/PPD, Titers & Pulmonary Functions

DXC Assure Claims v.19.3 screen



[Fig. 6]

Selected Encounter Type vis-à-vis Their Corresponding Auto-generated Accordions

The table below lists the various Encounter Types and their corresponding (auto-generated) accordions.

Encounter Type Selected	Corresponding Auto-generated Accordion
Drug Testing	<i>Drug Testing Data Entry</i>
Alcohol	<i>Alcohol Data Entry</i>
Hearing Conservation	<i>Hearing Conservation Data Entry</i>
	<i>Hearing Conversation Analysis</i>
	<i>Hearing Conservation Test Listing</i>
Vaccination	<i>Vaccination Listing</i>
	<i>Vaccination Data Entry</i>
	<i>Compliance</i>

Hepatitis – B	Vaccination Listing Hepatitis – B Data Entry Compliance
Tuberculosis/PPD	Vaccination Listing Tuberculosis/PPD Data Entry Compliance
Titers	Vaccination Listing Titers Data Entry Titers History Compliance
Pulmonary Functions	Pulmonary Functions Data Entry Pulmonary Functions Analysis

Important Information for Encounter Type Specific Auto-Generated Accordions & Their Fields

Hearing Conservation

When the **Encounter Type** is **Hearing Conservation**, and the Encounter is saved, then,

- All fields on the Encounter (Medical Management) accordion will be editable except Encounter Type and Encounter Type Description.
- On the Encounter (Medical Management) when the **Date** is entered, then the **Test Date** field on the **Hearing Conservation Data Entry** accordion will get auto-populated with the same.
- If the Test Date on the **Hearing Conservation Data Entry** accordion is Changed, then the **Date** field in the grid inside the **Hearing Conservation Analysis** accordion also gets updated with the same.
- On the **Hearing Conservation Data Entry** accordion, for a given **Serial#**, the corresponding **Calibration** (Date) [Fig. 7] will be auto-populated based on the data entered in **Medical Management Setup** under **Utilities**.

DXC Assure Claim v19.3 screen

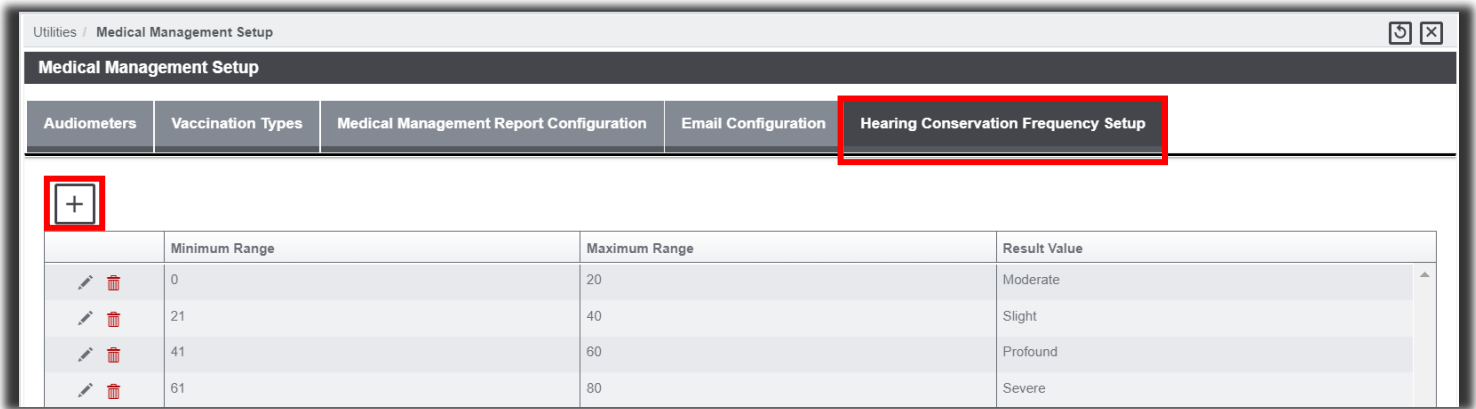
The screenshot shows the 'Hearing Conservation Data Entry' form with the following fields and values:

- Test Date: 01/09/2019
- Test Time: [Empty]
- Clinic: [Empty]
- Test Type: [Empty]
- Serial#: [Empty]
- Examiner: [Empty]
- Calibration: dd/MM/yyyy
- Exposure: [Empty]

[Fig. 7]

- In the **Hearing Conservation Analysis** accordion, the values in the **Current Left** and **Current Right** columns will be auto-populated based on data entered in the **Hearing Conservation Data Entry** accordion.
- The columns **Baseline Left**, and **Baseline Right** will show values based on the data entered in the database for the Current Left and Right columns for the given employee from a record that has been marked as Baseline and has a Test Date that precedes the Test Date of the record that is currently being added.
- A new tab - **Hearing Conservation Frequency Setup** [Fig. 8] has been introduced on the **Medical Management Setup** screen under **Utilities**. The main use of this tab is to populate the Hearing Loss Classifications lookups in the Hearing Conservation Analysis accordion based on entries made in the Left Side Values and Right-Side Values sections on the Hearing Conservation Data Entry screen.

DXC Assure Claim v.19.3 screen



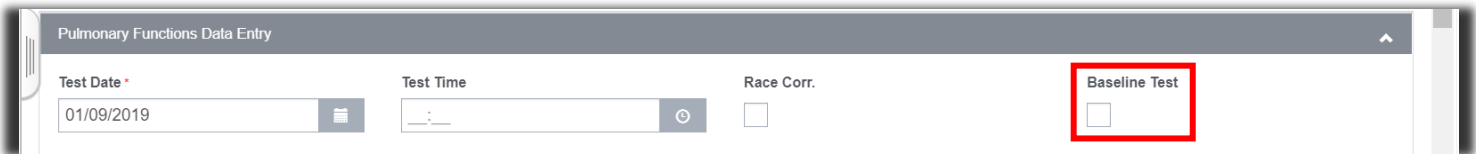
[Fig. 8]

Pulmonary Functions

When the Encounter Type is Pulmonary Functions:

- The following fields present in the Results section of the Pulmonary Functions Data Entry accordion are added to the grid present in the Pulmonary Functions Analysis accordion. These fields are - FVC, FEV05, FEV05/FVC, FEV1, FEV1/FVC, FEV3, FEV3/FVC, FEF25, FEF50, FEF75, FEF25-75, PEFR (Displayed in grid as PEF).
- The checkbox – **Baseline Test**, allows a record to be set as baseline and compare the rest of the records based on its values. [Fig. 9]

DXC Assure Claim v.19.3 screen



[Fig. 9]

- In the Pulmonary Functions Analysis accordion the comparison of readings with the baseline record is made. The values in **Predicted** column is calculated according to the **age** and the **gender** of an employee. If the gender of an employee is not added, then predicted values will not be calculated.

DXC Assure Claim v.19.3 screen

	Actual	Predicted	% of Pred	Baseline	Change	% Change
FVC	0	0	0	1	-1	-100
FEV05	0	0	0	0	0	0
FEV05/FVC	0	0	0	0	0	0

[Fig. 10]

- The prediction value method used is KNUDSO (1987/Intermountain Thoracic Society).

Titers

- The **Titers History** accordion displays Data in the form of a grid with 4 columns namely: **Titers Type, Date, Result and Susceptible**.
- When **Encounter Type Description** is selected as **Hepatitis B** and a **Titer Encounter Type** is created then the specific **Titer** record will be displayed in the **Hepatitis B Encounter Type** under **Lab Results**.

Vaccination Compliance Accordion

The **Compliance** screen is an accordion on the Medical Management screen which contains fields which are specific to the accordion, but some fields and lists that display data from other accordions like as well. These are:

Hepatitis B

- If there is an encounter where Hepatitis B data is added for the employee, then it will be displayed in this section.

Tuberculosis/PPD

- If there is any encounter for the employee, where Encounter type is Tuberculosis, the data is displayed in the PPD section.

CXR

- Last CXR date is the maximum date amongst all the encounters that has been added for an employee. CXR Date is the field present in the Encounter (Medical Management) accordion of an encounter.

Vaccines

- This section consists of the lists of all vaccines added for the employee.

Titers

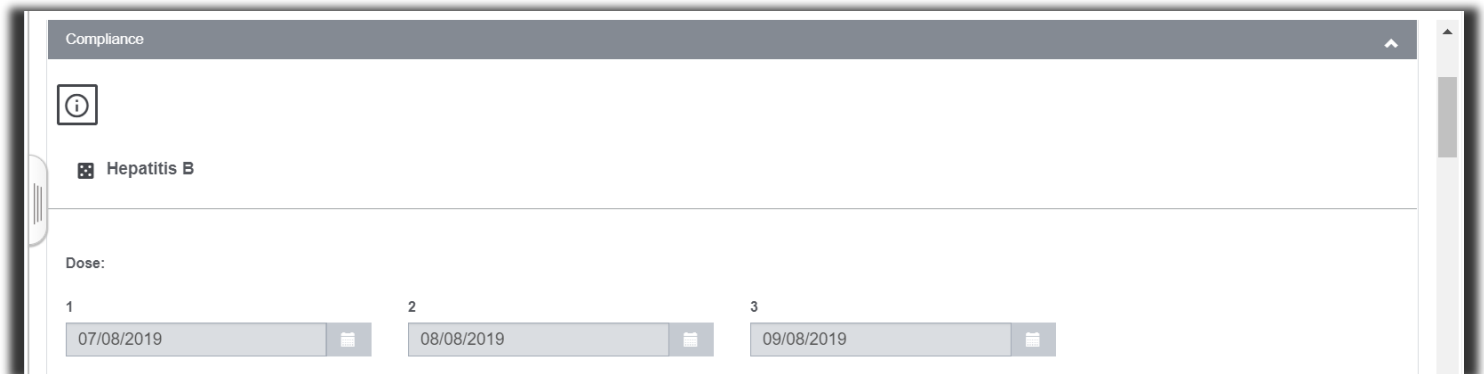
- The data entered in Titers for a employee is displayed in this section as a grid.

Figures labelled **[Fig-11-a]**, **[Fig-11-b]**, **[Fig-11-c]**, **[Fig-11-d]**, **[Fig-11-e]** and **[Fig-11-f]** show the various components of the **Compliance** accordion.

Note

- There is no separate SMS setting for Compliance.
- If a user has permission for Vaccination, the user can also see Compliance data.
- To save data on Compliance screen, we need to add data in Vaccination, Tuberculosis, Hepatitis B or Titers.
- Not adding data will result in the system displaying the mandatory fields not filled error while saving the record.

DXC Assure Claim v.19.3 screen



[Fig-11-a]

DXC Assure Claim v.19.3 screen

HBsAb1:

Date	Value	Code
<input type="text" value="01/08/2019"/>	<input type="text" value="34"/>	<input type="text" value="Reactive"/>

HBsAb2:

Date	Value	Code
<input type="text" value="01/08/2019"/>	<input type="text" value="23"/>	<input type="text" value="Reactive"/>

Boosters:

1	2	3
<input type="text" value="dd/MM/yyyy"/>	<input type="text" value="dd/MM/yyyy"/>	<input type="text" value="dd/MM/yyyy"/>

Decline

<input type="text" value="dd/MM/yyyy"/>

[Fig-11-b]

DXC Assure Claim v.19.3 screen

Exams/Training Required

Bloodborne Pathogen Training:

Due Date	Last Exam Date
<input type="text" value="23/05/2019"/>	<input type="text" value="23/05/2019"/>

Pre-Employment:

Due Date	Last Exam Date
<input type="text" value="dd/MM/yyyy"/>	<input type="text" value="dd/MM/yyyy"/>

Pulmonary Function Test:

Due Date	Last Exam Date
<input type="text" value="dd/MM/yyyy"/>	<input type="text" value="dd/MM/yyyy"/>

[Fig-11-c]

DXC Assure Claim v.19.3 screen

Tetanus:

Due Date	Last Exam Date
<input type="text" value="dd/MM/yyyy"/>	<input type="text" value="dd/MM/yyyy"/>

Vision Test:

Due Date	Last Exam Date
<input type="text" value="dd/MM/yyyy"/>	<input type="text" value="dd/MM/yyyy"/>

Hepatitis B Vaccine:

Due Date	Last Exam Date
<input type="text" value="dd/MM/yyyy"/>	<input type="text" value="dd/MM/yyyy"/>

[Fig-11-d]

DXC Assure Claim v.19.3 screen

PPD

PPD Details

Date Given	MM Reaction	Result
05/09/2019	54543454	
04/06/2019	0	

Prophylaxis:

Start: dd/MM/yyyy

End: dd/MM/yyyy

Decline: dd/MM/yyyy

[Fig-11-e]

DXC Assure Claim v.19.3 screen

CXR

Last CXR: dd/MM/yyyy

Vaccination Details

Vaccine Immunization Types	Date
	27/05/2019
	02/06/2019
	06/06/2019

Titers Details

Titer Type	Date	Result	Susceptible
Hepatitis B	01/08/2019	Reactive	Yes
Hepatitis B	01/08/2019	Reactive	No
Mumps	28/07/2019	Equivocal_test1	

[Fig-11-f]

Medical Management Setup Screen in the Utilities Zone

Settings are available under Utilities > Managers Menu > Medical Management Screen which are used for filling values on the **Hearing Conversation Data Entry** accordion, **Vaccination Data Entry** accordion and **header information** in the various **Reports** that are created via the **Medical Management** screen in **DXC Assure Claims v.19.3**.

The Medical Management Setup screen consists of the following tabs:

- **Audiometers**
- **Vaccination Types**
- **Medical Management Report Configuration**
- **Email Configuration**
- **Hearing Conservation Frequency Setup**

Audiometers

The Audiometers setup tab [Fig. 12] consists of a grid which consists of columns to capture –

- **Serial#**
- **Inactive flag**
- **Model**
- **Manufacturer**
- **Type**
- **Calibration Date**

- **Use This Date When Transferring Data**
- **Communications Port** (2 or 1)
- **Baud Rate** (300 or 600 or 1200 or 2400 or 4800 or 9800)
- **Parity** (N=None E=Even O=Odd)
- **Data Word Length** (7 or 8)
- **Stop Bits** (2 or 1)

For the **Serial# - Maico 31983**, the calibration date entered on the setup screen is 04.22.2019, which also gets displayed on the Hearing Conversation Data Entry accordion.

DXC Assure Claims v.19.3 screen

Serial#	Inactive	Model	Manufacturer	Type	Calibration Date	Use This Date When Tr...
Maico 31983	false				21/05/2019	true
Maico 31983	false		454564		22/05/2019	false

[Fig. 12]

Vaccination Types

The Vaccination Types tab [Fig. 13] consists of 5 fields –

- **Code (Vaccination Type)**
- **Default Expiration Date**
- **VIS Publication Date**
- **Default Lot Number**
- **Default Manufacturer**

Note

The data entered on the **Vaccination Types** tab gets populated on the **Vaccination Data Entry** accordion based on the selected **Vaccination Type**.

The screen can have only one record for one Vaccination Type, i.e. Code.

DXC Assure Claims v.19.3 screen

Code	Default Expiration Date	VIS Publication Date	Default Lot Number	Default Manufacturer
Hepatitis B	08/06/2019	07/06/2019	15	Glaxco
Mumps	21/05/2019	29/05/2019	34	SmithKlein Beecham

[Fig. 13]

Medical Management Report Configuration

The information fed into the **Medical Management Report Configuration** tab [Fig. 14] is used to setup the **header information** that is displayed on all the **reports generated** via the Medical Management Screen.

The fields on the **Medical Management Report Configuration** tab under Utilities > Medical Management Setup consists of:


- **Clinic Name**
- **Address 1**
- **Address 2**
- **Address 3**
- **Address 4**
- **State**
- **City**
- **Zip**
- **Phone**
- **Fax**
- **Email**
- **Hide SSN** (checkbox)
- **Logo** (configurable placeholder)

DXC Assure Claims v.19.3 screen

Utilities / Medical Management Setup

Medical Management Setup

Audiometers Vaccination Types **Medical Management Report Configuration** Email Configuration Hearing Conservation Frequency Setup

Clinic Name: Address 1: Address 2:
 Address 3: Address 4: State: ...
 City: Zip: Phone:
 Fax: Email: Logo: 
 Hide SSN

[Fig. 14]

Hearing Conservation Frequency Setup

The **Hearing Conservation Frequency Setup** tab [Fig. 15] on the **Medical Management Setup** screen is used to determine the **Frequency Range** & the **results** displayed on the **Hearing Conservation Data Entry** accordion.







DXC Assure Claims v.19.3 screen

Utilities / Medical Management Setup

Medical Management Setup

Audiometers Vaccination Types Medical Management Report Configuration Email Configuration **Hearing Conservation Frequency Setup**

+

	Minimum Range	Maximum Range	Result Value
 	0	20	Moderate
 	21	40	Slight
 	41	60	Profound

[Fig. 15]

Email Configuration

The **Email Configuration** tab [Fig. 16] on the **Medical Management Setup** screen under Utilities consists of 2 sections –

- **Reports Email Configuration**
- **Appointment Email Configuration**

The email addresses used for sending emails for **Appointments**, **Encounters** and **WDS Forms** post saving an Encounter can be configured on this screen.

A default value for **Appointment Location** can also be configured along with **Appointment Reminders** via the same screen.

Prerequisite SMS Permission

Select the **Medical Management Setup** through **Utilities** checkbox on the following path:

Security > Security Management System > Select DSN... > Module Access Permissions > Utilities (expand) > Medical Management Setup (checkbox)

DXC Assure Claims v.19.3 screen

Utilities / Medical Management Setup

Medical Management Setup

Audiometers Vaccination Types Medical Management Report Configuration **Email Configuration** Hearing Conservation Frequency Setup

Reports Email Configuration

From Email Address

To Email Address

CC Email Address

Appointment Email Configuration

From Email Address

To Email Address

CC Email Address



Reminder Days

Location

[Fig. 16]

Entity Appointment

Entity Appointment is accessible via the right-hand pane [Fig. 17] on the **Employee Maintenance** screen.

- Only the Current Appointment is displayed under the Appointments node on the right-hand pane of the Employee screen.
- Cancelled, Missed and Completed Appointments are not displayed under the Appointments node on the right-hand pane of the Employee screen.
- All appointments – Current, Completed, Cancelled and Missed can be viewed by selecting the horizontal ellipsis button  on the Appointments node. [Fig. 17]
- A New Appointment can be created via the Entity Appointment screen by selecting the Add button  on the Appointments node.
- New Appointments can be cancelled by selecting the Cancel toolbar button.

DXC Assure Claims v.19.3 screen

Employee Maintenance (345334)

Employee Maintenance [Reid, Simon]

Employee

Employee Number * 345334

Last Name * Reid

First Name Simon

Middle Name

Address 1

Address 2

Address 3

Address 4

Country

State

City

County

Banking Information 1

Violations 0

Dependents 0

Medical Management 39

- 14/04/2019 Drug Testing
- 28/04/2019 Drug Testing
- 29/04/2019 Drug Testing

Appointments 1

- 30/09/2019 12:00 PM

[Fig. 17]

Reports

Access via Primary Toolbar

Reports can be accessed by selecting the **Medical Management Reports** option from the **Reports** dropdown menu on the primary toolbar

DXC Assure Claims v.19.3 screen

Document Diaries Funds My Work Search User Documents Reports Users Portlets

Medical Management Reports

Reports

Select Type of Reports

[Fig. 18]

Selecting the lookup button on the **Medical Management Reports** screen opens the EHC Report Types popup window.

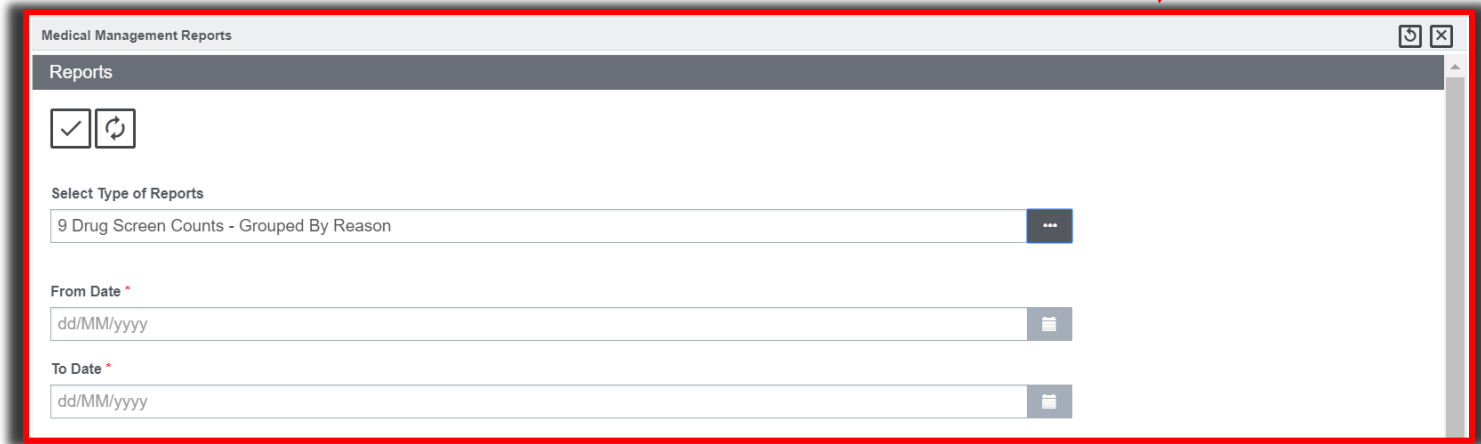
All grouped reports of Type 9,8,13,14,15,16 are listed on the EHC Report Type popup window. [Fig. 19]

Selecting a Description link against a given Code number opens the Reports (Filter Criteria) screen. [Fig. 20]

Code	Description	Parent Code
13	Encounter Listing Report	G
14	Encounter Counts - Grouped By De...	G
15	Encounter Counts - Grouped By En...	G
16	Encounter Log Counts	G
8	Summary of Drug Testing Program	G
9	Drug Screen Counts - Grouped By ...	G

[Fig. 19]

DXC Assure Claims v.19.3 screen



Medical Management Reports

Reports

✓ ↻

Select Type of Reports

9 Drug Screen Counts - Grouped By Reason

From Date *

dd/MM/yyyy

To Date *

dd/MM/yyyy

[Fig. 20]

Access via Medical Management Screen

Reports can also be accessed via the **Medical Management** screen. {[Fig. 2], on page 6 of this document}

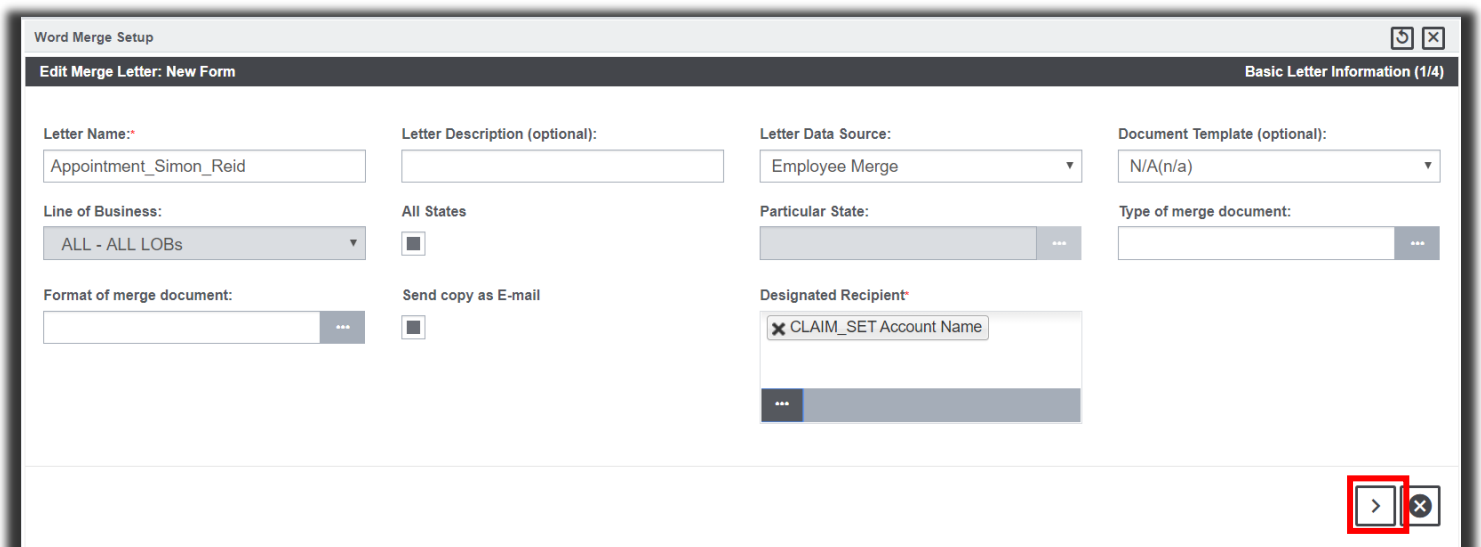
Reports button is provided in toolbar button of medical management to fetch reports. Individual reports of type 1, 2, 3, 4, 5, 6, 7,10,11 and 12 are displayed on **EHC Report Types** popup window (like that shown in [Fig. 19]).

Email Configuration for Appointments

The following steps must be followed for configuring an email for Appointments:

1. Create an **Employee Mail Merge** template in **DXC Assure Claim v.19.3** via User documents > Word Merge Setup > (select) Create Template button to open the **Edit Merge Letter: New Form** screen. [Fig. 21]
 - Fill up all mandatory fields and select the **Next** button to navigate to the next screen.

DXC Assure Claims v.19.3 screen



Word Merge Setup

Edit Merge Letter: New Form Basic Letter Information (1/4)

Letter Name:*

Appointment_Simon_Reid

Letter Description (optional):

Letter Data Source:

Employee Merge

Document Template (optional):

N/A(n/a)

Line of Business:

ALL - ALL LOBs

All States

Particular State:

Type of merge document:

Format of merge document:



Send copy as E-mail

Designated Recipient*

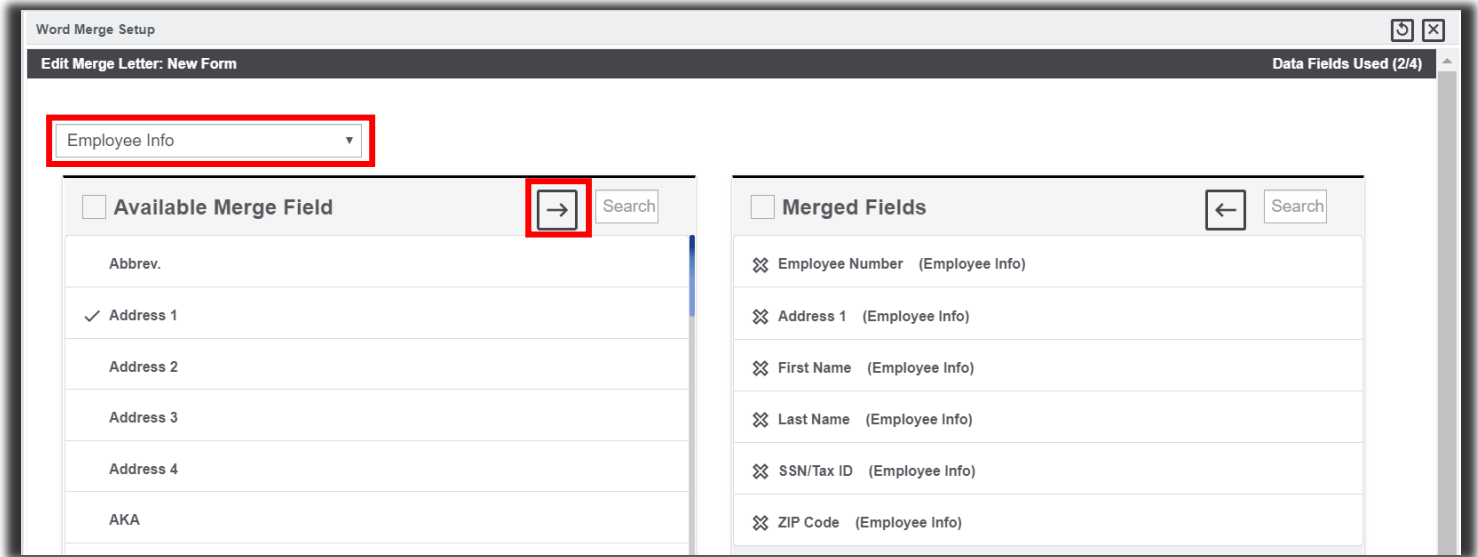
CLAIM_SET Account Name

> ✕


[Fig. 21]

2. **Select a Category [Fig. 22]** from the dropdown menu, then,
 - Select requisite items from the **Available Merge Fields** list.
 - Select the **Move**  button to move selected items to the **Merged Fields** list.
 - select the **Next**  button to navigate to the next screen.

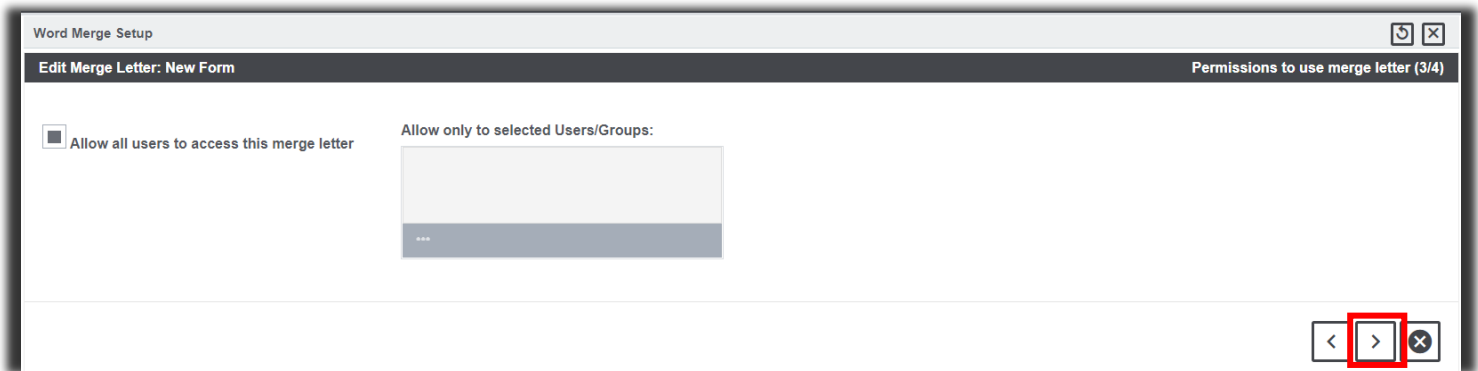
DXC Assure Claims v.19.3 screen



[Fig. 22]

3. On the **Permission to Use Merge Letter** screen [Fig. 23], choose appropriate permissions and select the **Next**  button.

DXC Assure Claims v.19.3 screen



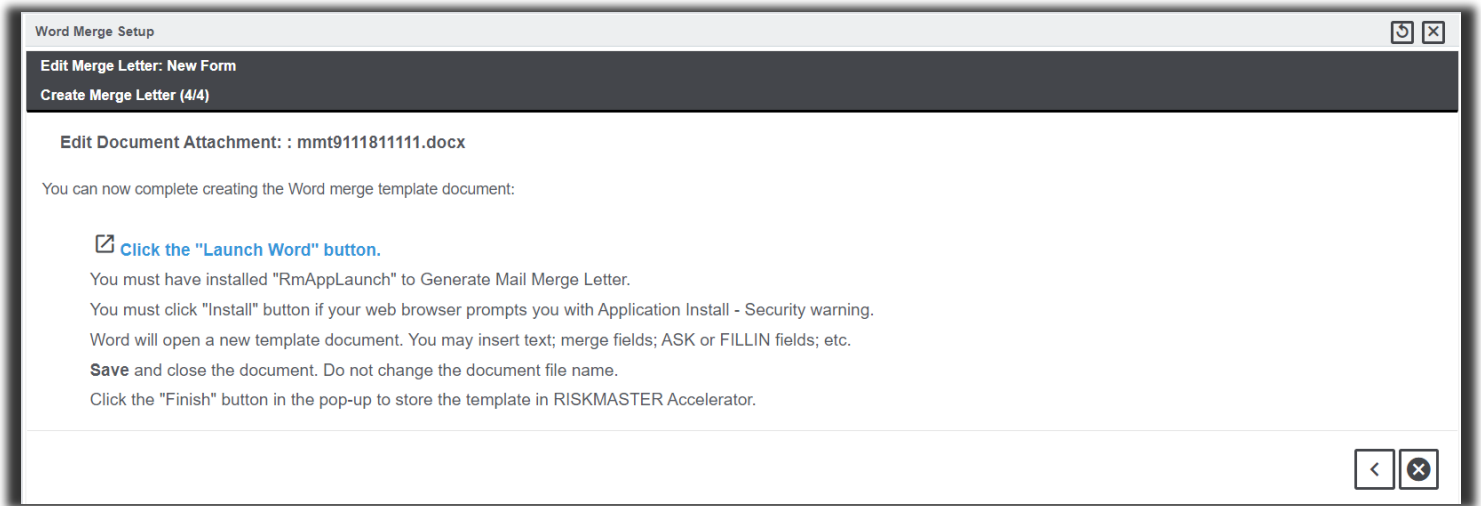
[Fig. 23]

4. On the **Create Merge Letter** screen, select the **Launch Word** link [Fig. 24] to generate a **Mail Merge Letter**.
 - Download & install the **RMLaunchApp**.
 - Follow onscreen prompts to complete the **Mail Merge Template** creation process.
 - Click **OK** on the popup message window displaying the message - **Merge Letter creation is complete. Your changes are stored successfully.**


Click Here

To download the
“RMLaunchApp” Mail Merge Application.

DXC Assure Claims v.19.3 screen



[Fig. 24]

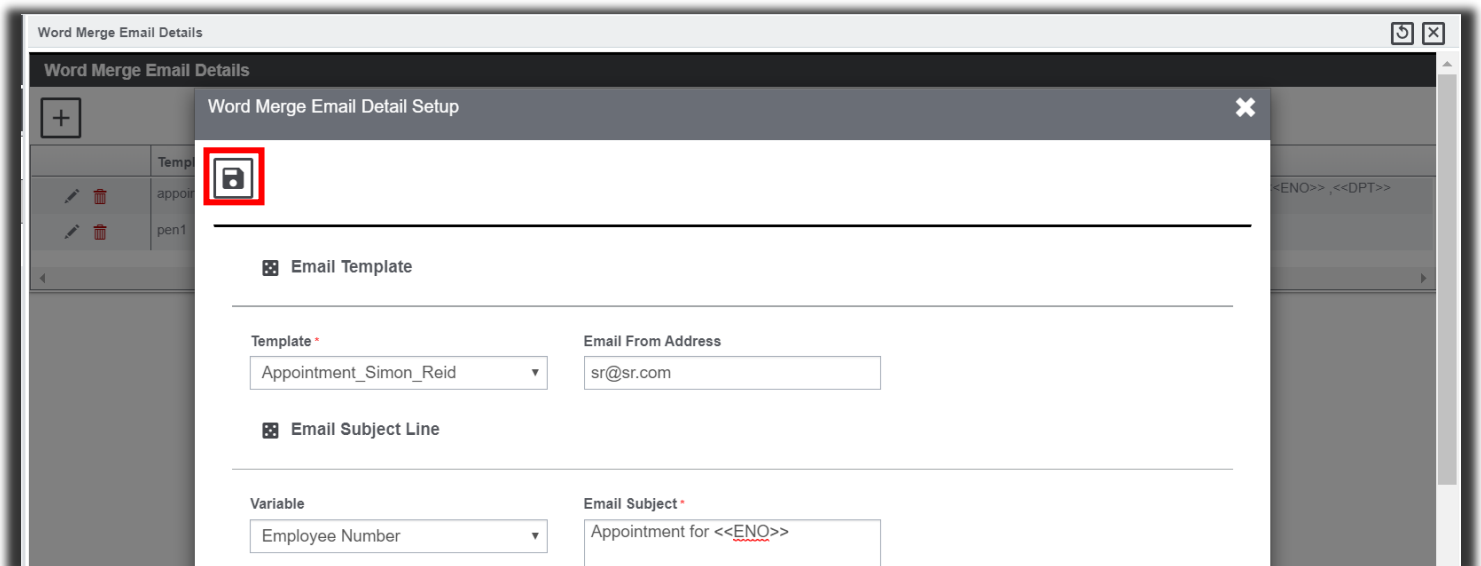
- Now, configure an email for the **Mail Merge Template** just created. Select User documents > Word Merge Email Details.
- On the **Word Merge Email Details** screen, select the Add New button  to open the **Word Merge Email Details Setup** popup window.

- Provide all necessary information followed by selecting the **Save** button. [Fig. 25]

Note

- A separate Email Configuration will have to be setup for each Template.
- Multiple Templates and Email Configurations will be required for each Template to identify different Emails to be received.

DXC Assure Claims v.19.3 screen

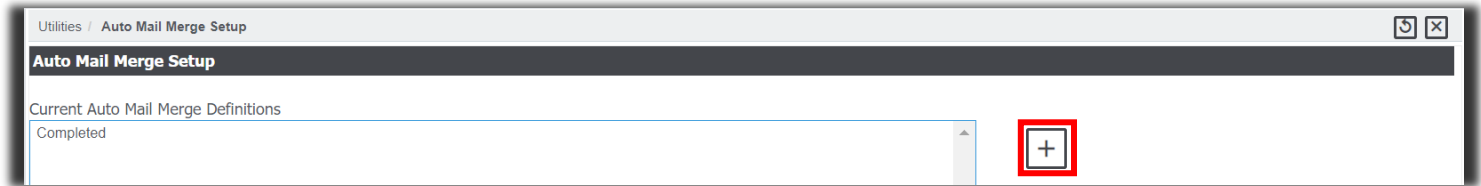


[Fig. 25]

Auto Mail Merge Setup for Appointments

7. Now, got to **Auto Mail Merge Setup** which is accessed via the Tools and Designers menu of the **Utilities** zone. **[Fig. 26]**
 - Select the New button to open the **Auto mail Merge Creation - (Introduction)** popup window.

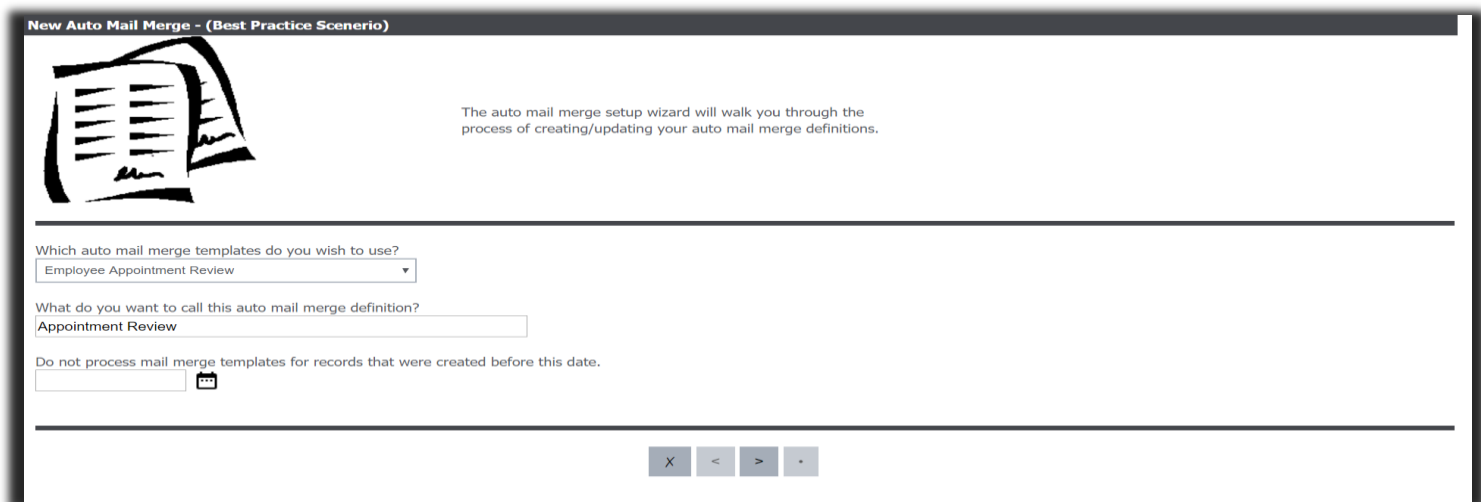
DXC Assure Claims v.19.3 screen



[Fig. 26]

8. The next step in the process is setting up an **Entity Appointment Management Review** Auto Mail Merge definition for each **Template**. **[Fig. 27]**

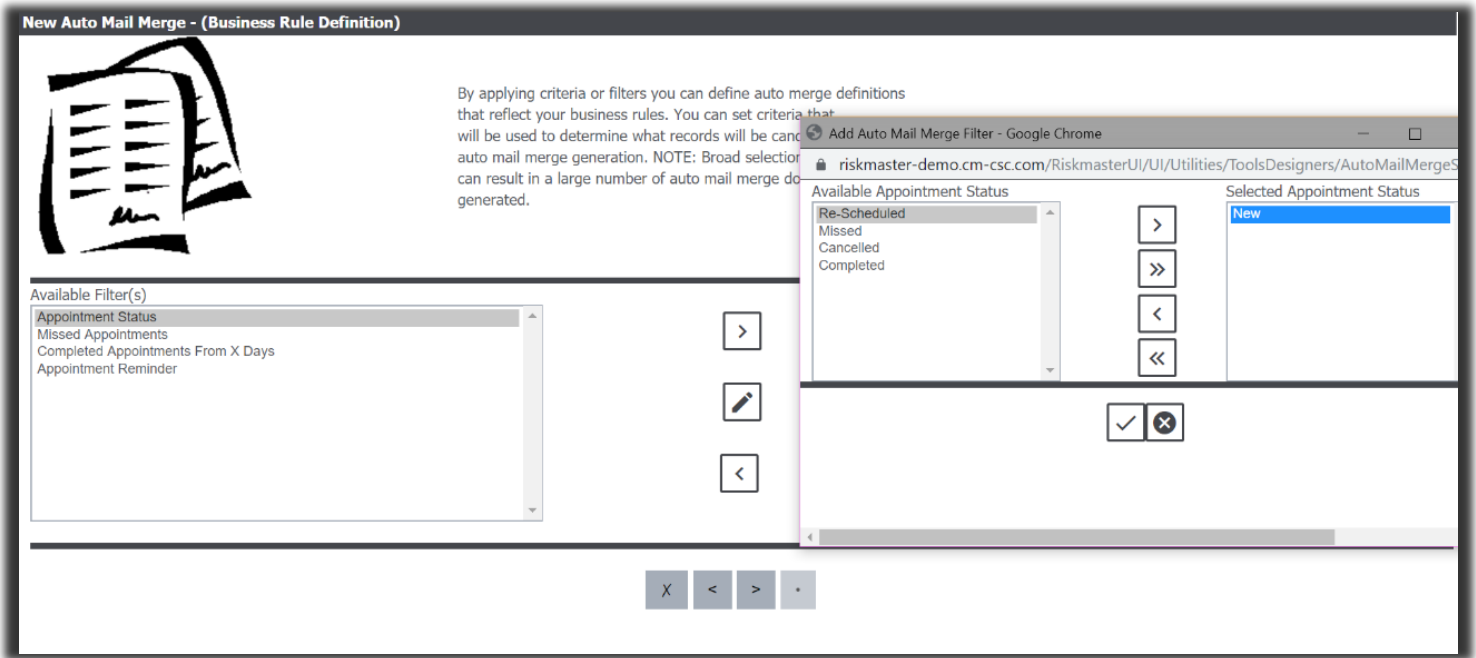
DXC Assure Claims v.19.3 screen



[Fig. 27]

9. Use the filters to create an Auto Mail Merge Set up to address the Employee's behavior (keeping/ missing/ cancelling an appointment).
 - a. **Creating a New Appointment** – Use **Appointment Status** code filter with short code as **New**. **[Fig. 28]**

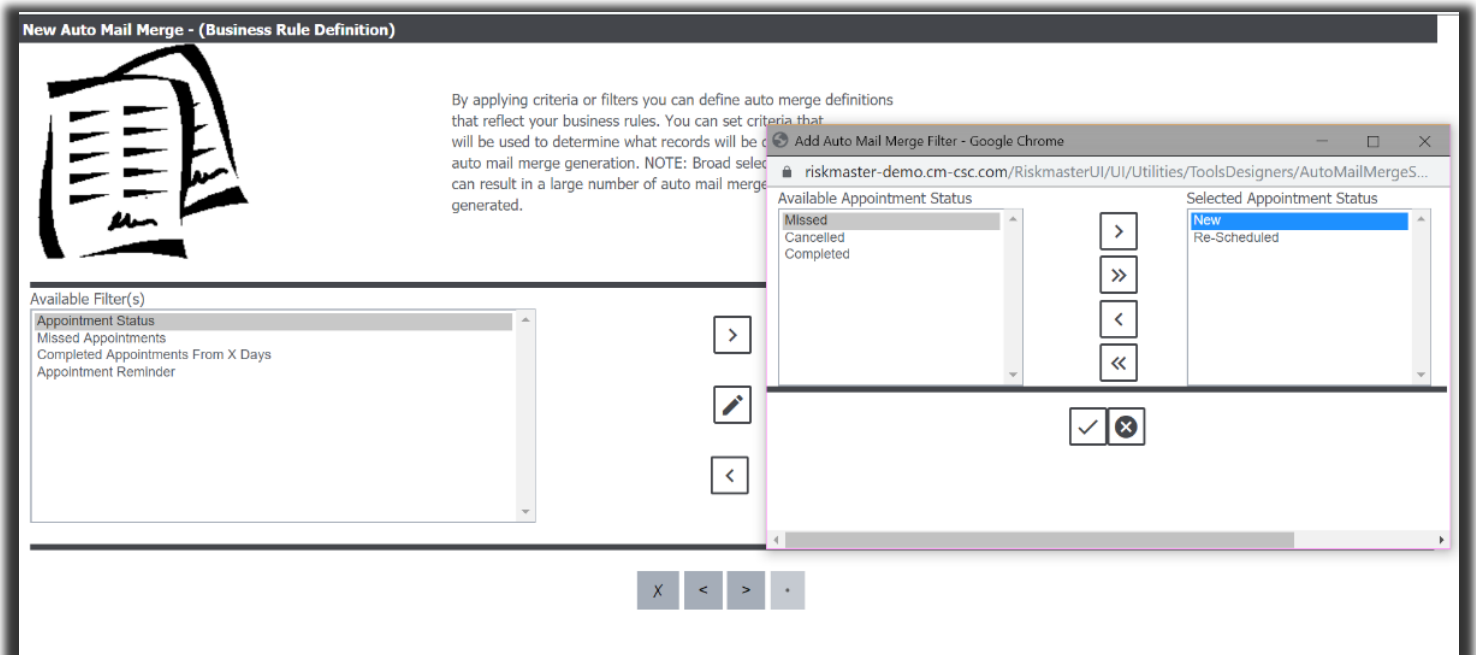
DXC Assure Claims v.19.3 screen



[Fig. 28]

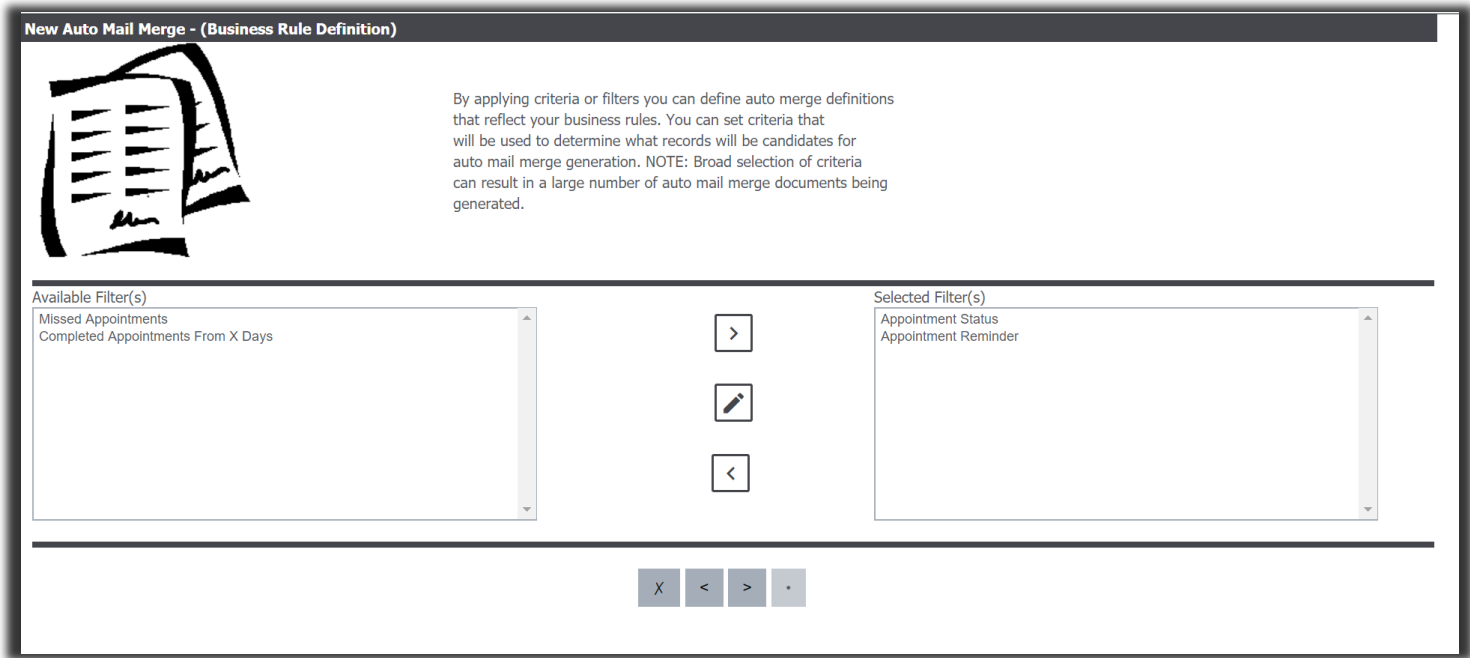
- b. **Rescheduling an Appointment** – Use the **Appointment Status** code filter with short code as **Reschedule**.
- c. **Cancelling an Appointment** – Use the **Appointment Status** code filter with short code as **Cancelled**.
- d. **Reminding for an Appointment** – Use the **Appointment Status** code filter as **New** and **Reschedule** as inclusions [Fig. 29] for appointment **Reminder** and add filter as **Appointment Reminder**. [Fig. 30]

DXC Assure Claims v.19.3 screen



[Fig. 29]

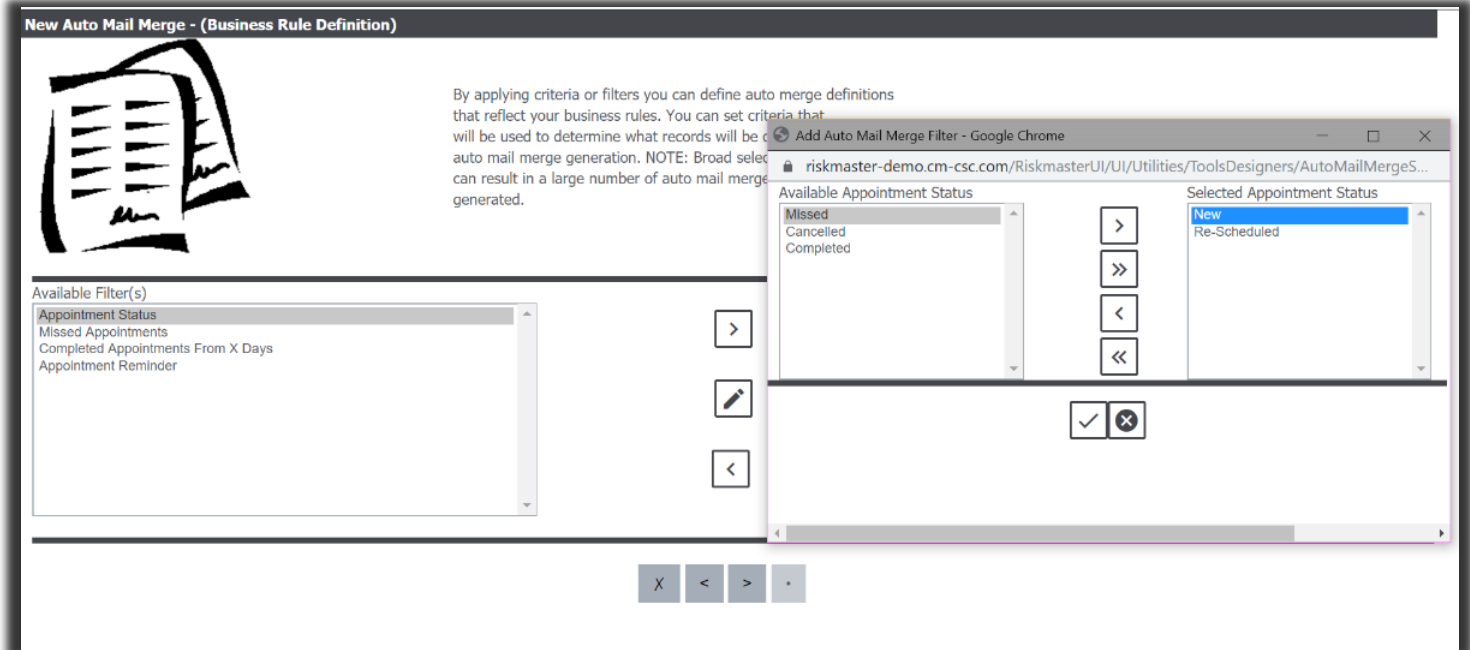
DXC Assure Claims v.19.3 screen



[Fig. 30]

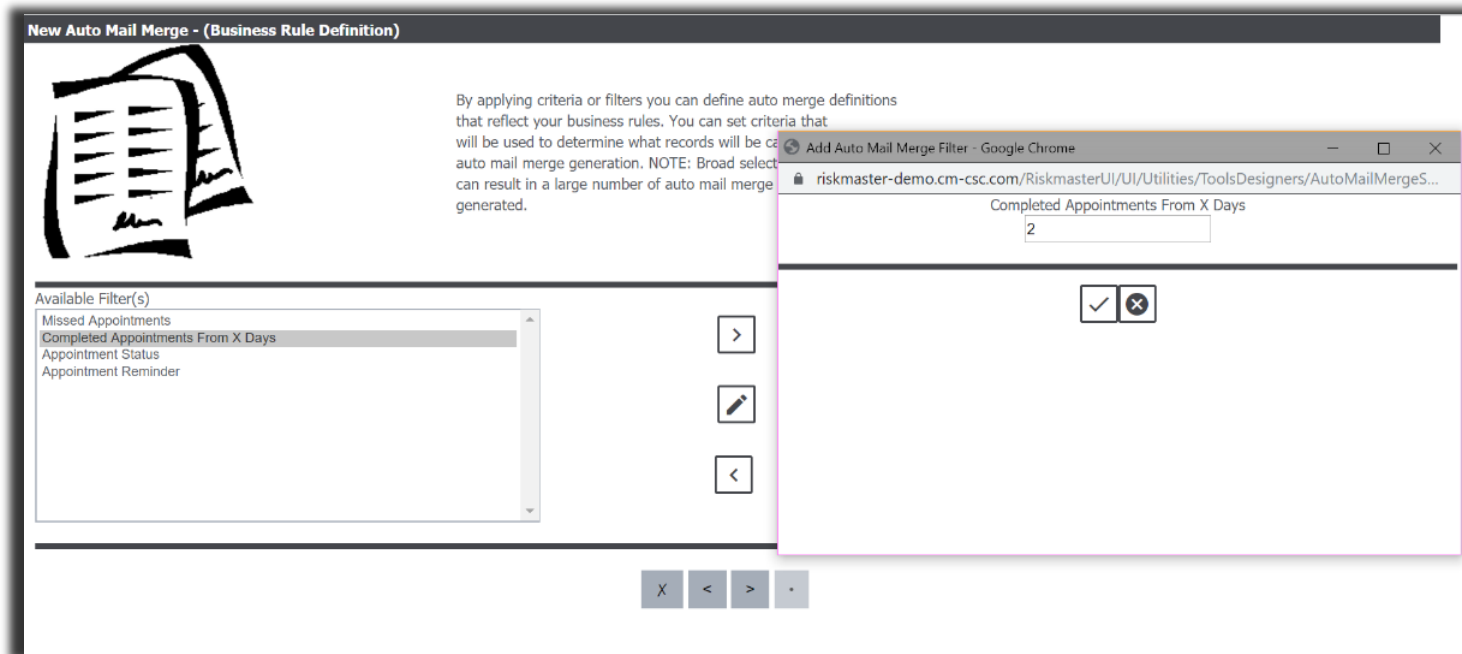
- e. **Completing an Appointment** – Use the **Appointment Status** code as **New** and **Reschedule** for inclusions and add the filter **Completed Appointment From X-Days** [Fig. 31]. Hence when **X-days** [Fig. 32] have passed then the Appointment would be marked as **Completed**. [Fig. 33]

DXC Assure Claims v.19.3 screen



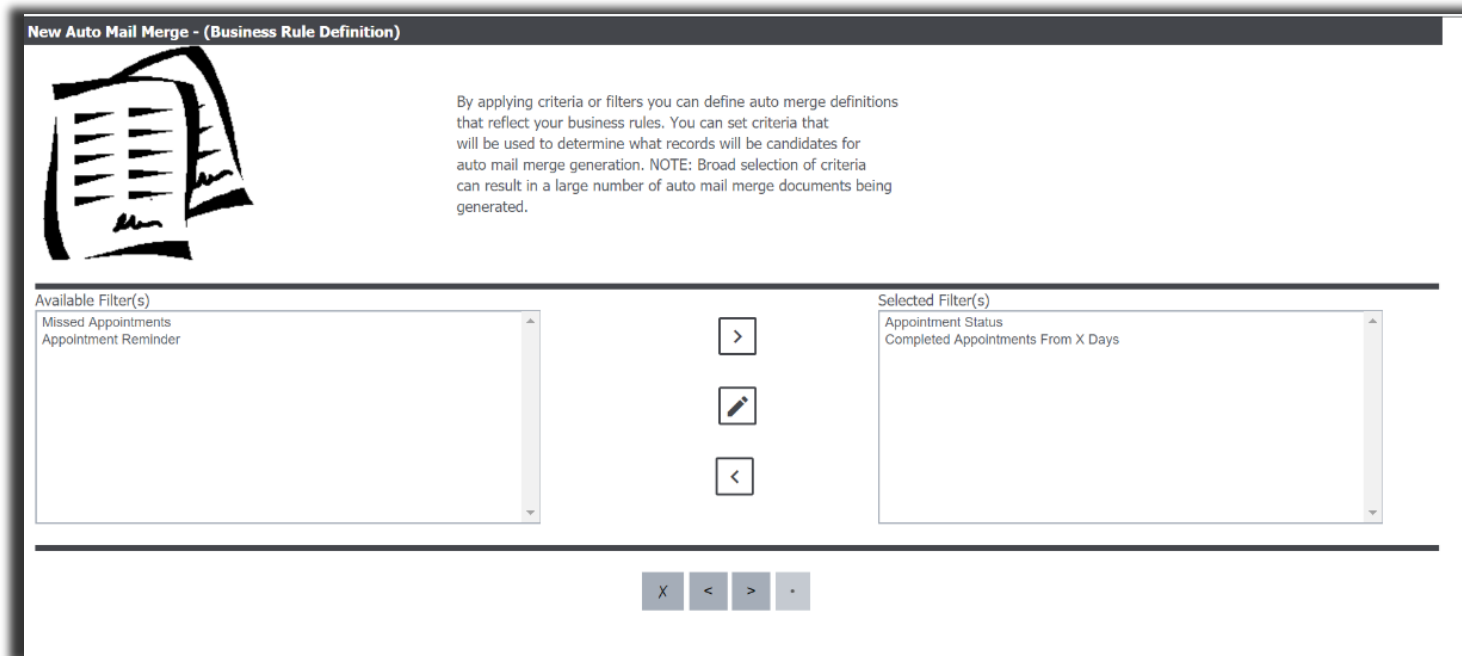
[Fig. 31]

DXC Assure Claims v.19.3 screen



[Fig. 32]

DXC Assure Claims v.19.3 screen



[Fig. 33]

- f. **Missed Appointment** – Use the **Appointment Status** code as **New** and **Reschedule** as inclusions for Missed Appointments and then add the filter **Missed Appointment**.

The above-mentioned status would change only when an Auto Mail Merge job is run except for New and Cancelled status.

Changing the Status of an Appointment

10. Rescheduled Appointment Email

When any or all the following fields are changed, then the system will consider the **Appointment** as **Rescheduled** and an email informing about the same would be sent.

- Start Date
- Start Time
- End Date
- End Time
- Location

11. Reminder Appointment Email

When the number of days defined in the **Reminder Days** prior to Appointment is matched then a **Reminder** email would be sent. The **Reminder Days** are set in **Medical Management Setup** screen.

12. Complete Appointment Email

Whenever the **Appointment** is used while creating a **Medical Management** record then system will change the status as completed and email will be sent.

13. Missed Appointment Email

When the **Start Date** for an **Appointment** has been reached or passed and the **Appointment** does not get **linked** with any of the **Encounters**, then system considers the appointment as **Missed** and its status changes to Missed along with an email notification.

Email Configuration

14. The Email Configuration tab available on the Medical Management Setup screen in the Utilities zone is where the following can be defined for sending emails:

- **Reports Email Configuration**
 - From Email Address: (Override allowed at Medical Management screen)
 - To Email Address: (Override allowed at Medical Management screen)
 - CC Email Address: (Override allowed at Medical Management screen)
 - Select Template for Reports: User can select any of the 'Employee Merge' template and the same template will be used for all the Medical Management records.
- **Appointment Email Configuration**
 - From Email Address: (Override allowed at Appointment screen)
 - To Email Address: (Override allowed at Appointment screen)
 - CC Email Address: (Override allowed at Appointment screen)
 - Reminder Days: (Override is NOT allowed at Appointment screen)
 - Location: (Override allowed at Appointment screen)

As the system will use the Auto Mail Merge Templates as created various Filter Types, as mentioned earlier, it is recommended to create only one template for each Filter Type.

Saving a Record and Sending Encounter & WDS Forms as Email Using Auto Mail Merge

Emails for an **Encounter Form** and a **WDS Form** are sent using Mail Merge. A new review type – **Medical Management Review** has been added on the **Auto Mail Merge Setup** screen has Forms email filter. [Fig. 34]

DXC Assure Claims v.19.3 screen

New Auto Mail Merge - (Best Practice Scenario)

The auto mail merge setup wizard will walk you through the process of creating/updating your auto mail merge definitions.

Which auto mail merge templates do you wish to use?
Medical Management Review

What do you want to call this auto mail merge definition?
MedicalManagement Attachments

Do not process mail merge templates for records that were created before this date.

[Fig. 34]

Select filter “Email Medical Management Form” and Save. [Fig. 35]

DXC Assure Claims v.19.3 screen

New Auto Mail Merge - (Business Rule Definition)

By applying criteria or filters you can define auto merge definitions that reflect your business rules. You can set criteria that will be used to determine what records will be candidates for auto mail merge generation. NOTE: Broad selection of criteria can result in a large number of auto mail merge documents being generated.

Available Filter(s)

Selected Filter(s)
Email Medical Management Form

[Fig. 35]

This will create an **Auto Mail Merge Template** for **Medical Management Reports (Encounter and WDS Reports)** to be sent as Attachments via email.

Additionally, a new checkbox - **Email Encounter and WDS Reports** gets added on main Medical Management screen. [Fig. 36]

Note

The Mail Merge setup will only pick-up the Encounter and WDS Reports if this checkbox is selected.

DXC Assure Claims v.19.3 screen

Employee Maintenance (7765432) / Medical Management (31/05/2019)

Medical Management

Encounter (Medical Management)

Date: 31/05/2019

Time: [:]

Encounter Type Description: Blood Draw Blood Draw

Encounter Type: 1 Drug Testing

Work Related:

Worker's Comp:

Clinic: []

Examiner: []

Treatment: []

Encounter Notes: []

For Appointment: -- Please Select --

Email Encounter and WDS Reports:

[Fig. 36]

Attaching encounter form and WDS form to attachments

At the time of saving an Encounter, the system displays a prompt to attach PDFs as attachments. When the option – Yes, is selected in response, **PDFs of the Encounter Form and WDS Form** get appended to the email. [Fig. 37]

DXC Assure Claims v.19.3 screen

Employee Maintenance (7765432) / Medical Management (31/05/2019)

Medical Management

Encounter (Medical Management)

Date: 31/05/2019

Work Related: []

Clinic: []

Examiner: []

Treatment: []

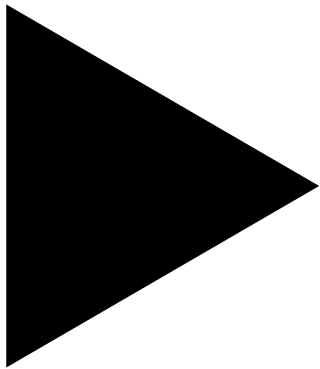
Confirm

Do you want to attach the Form PDF to this encounter attachments?

[Fig. 37]

Note

The **Confirm** popup and the checkbox **Email Encounter and WDS Reports** are displayed only when SMS permissions for **WDS Form Create/Update** are set to true.



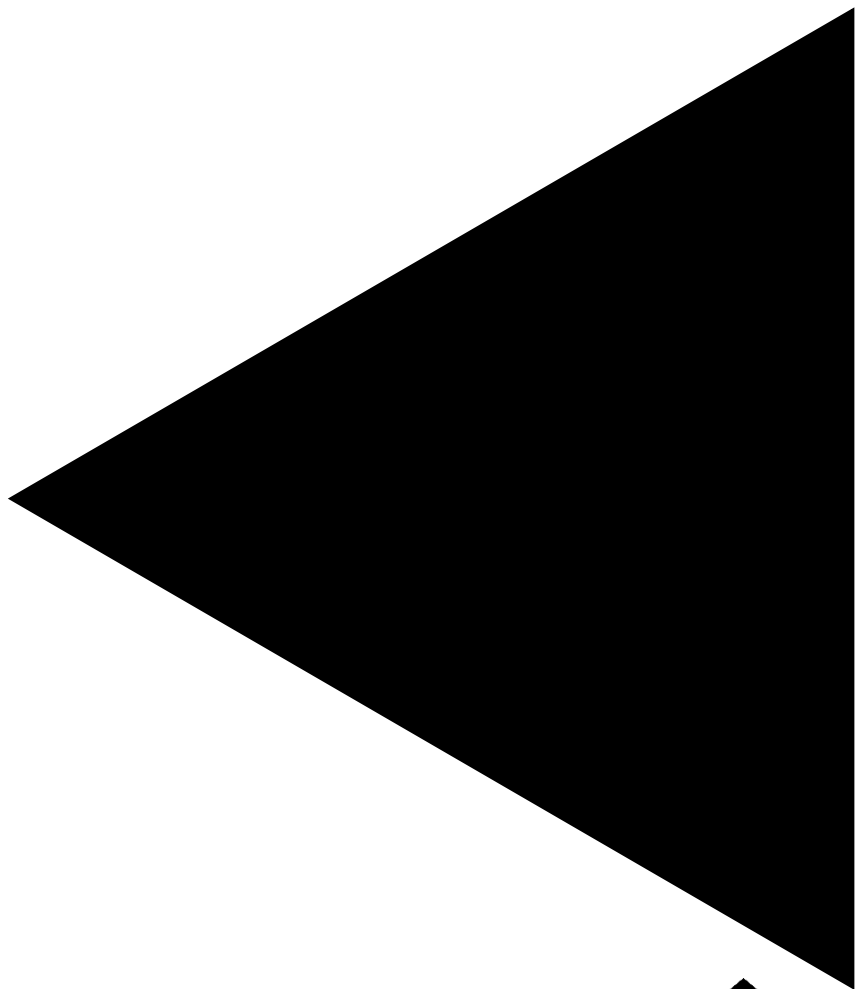
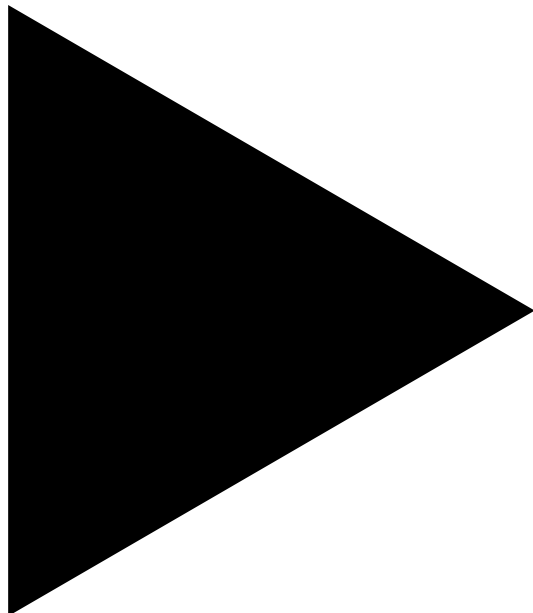
DXC Assure Claims

Document Name

Release: v.19.3

October 2019

About & Contact



DXC TECHNOLOGY: NEW. BUT NOT BORN YESTERDAY.

About DXC Technology

The company was formed on April 1, 2017, by the merger of CSC and the Enterprise Services business of Hewlett Packard Enterprise. DXC Technology has successfully guided the world's largest enterprises and government agencies through successful change cycles. With some 137,000 employees worldwide, the company's deep experience gives it a clear and confident vision to help clients navigate the future.

DXC Technology is a Fortune 500 company and represented in the S&P 500 Index. The company works to create greater value for clients, partners and shareholders, and to present growth opportunities for its people. DXC Technology is ranked among the world's best corporate citizens.

DXC Technology's extensive partner network helps us drive collaboration and leverage technology independence. The company has established more than 250 industry-leading global Partner Network relationships, including 15 strategic partners: Amazon Web Services, AT&T, Dell EMC, HCL, Hitachi Vantara, HP, HPE, IBM, Lenovo, Micro Focus, Microsoft, Oracle, PwC, SAP and ServiceNow.

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and Technology

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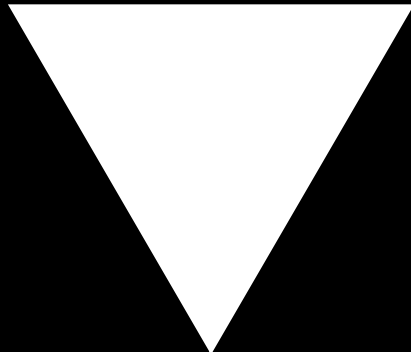
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