



**#1 provider**  
of core insurance  
systems

**40+ years**  
of innovation in the  
insurance industry

**1900+**  
customers and active  
customer communities

**13M+**  
policies under  
administration

## DXC Assure Claims

*Meet consumer expectations and optimize processes with a flexible, scalable, and configurable claims management system.*

# Medical Management

Release version 24.3

September 2024



**Legal Disclaimer:** This document contains trade secrets and confidential information, which are proprietary to DXC Technology. The use, reproduction, distribution, or disclosure of the documentation, in whole or part, without the express written permission of DXC is prohibited. The information in this document is subject to change.



DXC Technology, 1775 Tysons Blvd, Tysons, VA 22102, USA. All rights reserved. Printed in U.S.A.



All questions regarding this documentation should be routed through customer assistance, Blythewood, SC

Phone: 877-275-3676  
Email: [risksupp@dxc.com](mailto:risksupp@dxc.com)

# Table of contents



<b>Introduction to Medical Management</b> .....	<b>4</b>
<b>Preliminary Settings</b> .....	<b>5</b>
<b>Security zone settings for enabling Medical Management functionalities</b> .....	<b>5</b>
Complete list of SMS screen checkboxes for enabling all Medical Management functionalities.....	7
<b>Configuration Manager zone settings for Medical Management features</b> .....	<b>8</b>
Enabling the checkbox – Use Medical Management.....	8
Configuring the Medical Management Setup screen.....	9
Audiometers .....	10
Vaccination Types .....	11
Medical Management Report Configuration .....	12
Email Configuration.....	13
Hearing Conservation Frequency Setup .....	13
<b>Using Medical Management</b> .....	<b>15</b>
<b>Creating &amp; Working with a (New) Medical Management Record</b> .....	<b>15</b>
Medical Management screen.....	16
Encounter (Medical Management) Accordion .....	17
Automatic addition of accordions based on “Encounter Type” selection.....	18
Working on an Existing Medical Management Record .....	19
Deleting an Existing Medical Management Record.....	20
<b>‘Encounter Form’ and ‘Work Duty Status Form’ accordion</b> .....	<b>20</b>
Conditions under which the ‘Encounter Form’ accordion becomes available.....	20
<b>Various ‘Encounter Types’</b> .....	<b>22</b>
Selected ‘Encounter Type’ vis-à-vis its corresponding auto-generated accordion(s) .....	22
Important information for ‘Encounter Type’ specific auto-generated accordions & their fields.....	23
Information about ‘Encounter Type’ – ‘Hearing Conservation’.....	23
Pulmonary Functions .....	25
Titers.....	26
<b>Vaccination Compliance Accordion</b> .....	<b>26</b>
<b>Reports</b> .....	<b>29</b>

- Access via Primary Toolbar..... 29
- Access via Medical Management Screen..... 30**
- Email Configuration for Appointments ..... 30**
  - Auto Mail Merge Setup for Appointments ..... 35
  - Changing the Status of an Appointment ..... 39
  - Email Configuration..... 40
  - Saving a Record and Sending Encounter & WDS Forms as Email Using Auto Mail Merge ..... 40
  - Attaching encounter form and WDS form to the attachments..... 42



# Introduction to Medical Management

DXC Assure Claims | Medical Management



The Medical Management feature is used for capturing the details of an Employee's Encounters with various visits to health clinics for different tests and procedures.

This module has been specially designed to cater to organizations that offer services to promote, protect, and restore each of its employee's health and to facilitate having an optimal quality of life so that they deliver maximum productivity in the workplace.



# Preliminary Settings

DXC Assure Claims | Medical Management

## Security zone settings for enabling Medical Management functionalities

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

- Employee Maintenance screen
- Event screen
- General Claim screen
- Workers' Compensation Claim screen
- Property Claim screen
- Vehicle Accident screen
- Health Claim screen
- Litigation screen
- Policy screen

The following checkboxes for Medical Management must be selected on the SMS screen in the Security zone to grant complete access to users. Administrators of DXC Assure Claims can configure feature access for individual users as desired.

Accessing Medical Management via	Breadcrumb Trail	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 → <b>Medical Management</b> {on right-hand side (RHS) pane}	...→ Employee Maintenance (expand) → <b>Medical Management</b> (checkbox).
Event	Event → PI Employee → <b>Medical Management</b> (on RHS pane)	...→ Event (expand) → Persons Involved (expand) → <b>Employee Medical Management</b> (checkbox)
General Claims	GC → PI Employee → <b>Medical Management</b> (on RHS pane)	...→ General Claims (expand) → Persons Involved (expand) → <b>Employee Medical Management</b> (checkbox)
Workers' Compensation Claims	WC → PI Employee → <b>Medical Management</b> (on RHS pane)	...→ Workers' Compensation Claims (expand) → Persons Involved (expand) → <b>Employee Medical Management</b> (checkbox)
Property Claims	PC → PI Employee → <b>Medical Management</b> (on RHS pane)	...→ Property Claims (expand) → Persons Involved (expand) → <b>Employee Medical Management</b> (checkbox)
Vehicle Accident Claims	VA → PI Employee → <b>Medical Management</b> (on RHS pane)	...→ Vehicle Accident (expand) → Persons Involved (expand) → <b>Employee Medical Management</b> (checkbox)
Health Claims	HC → Litigation → PI Employee → <b>Medical Management</b> (on RHS pane)	...→ Health Claims (expand) → Persons Involved (expand) → <b>Employee Medical Management</b> (checkbox)
Litigation	GC → Litigation → PI Employee → <b>Medical Management</b> (on RHS pane)	...→ General Claims (expand) → Litigation (expand) → Persons Involved (expand) → <b>Employee Medical Management</b> (checkbox)
	WC → Litigation → PI Employee → <b>Medical Management</b> (on RHS pane)	...→ Workers' Compensation Claims (expand) → Litigation (expand) → Persons Involved (expand) → <b>Employee Medical Management</b> (checkbox)
	PC → Litigation → PI Employee → <b>Medical Management</b> (on RHS pane)	...→ Property Claims (expand) → Litigation (expand) → Persons Involved (expand) → <b>Employee Medical Management</b> (checkbox)
	VA → Litigation → PI Employee → <b>Medical Management</b> (on RHS pane)	...→ Vehicle Accident (expand) → Litigation (expand) → Persons Involved (expand) → <b>Employee Medical Management</b> (checkbox)
	HC → Litigation → PI Employee → <b>Medical Management</b> (on RHS pane)	...→ Health Claims (expand) → Litigation (expand) → Persons Involved (expand) → <b>Employee Medical Management</b> (checkbox)

<p><b>Policy</b></p>	<p>Claim → Policy → Person Involved → PI Employee → <b>Medical Management</b></p> <p>This permission will need to be turned on for each Claim LOB for which the Policy is applicable.</p>	<p>...→ Policy Tracking → Person Involved → <b>Employee Medical Management</b> (checkbox)</p>
----------------------	---	---

## Complete list of SMS screen checkboxes for enabling all Medical Management functionalities

To access all Medical Management functionalities via the screens mentioned in the table above, the following list of checkboxes must be selected on the SMS screen in the Security zone:

- **Medical Management/Employee Medical Management**
  - Allow access to Alcohol
    - Allow access to Encounter Form
      - Display Read-only
      - Update
    - Allow access to Work Duty Status
      - Display Read-only
      - Update
  - Allow access to Drug Testing
    - Allow access to Encounter Form
      - Display Read-only
      - Update
    - Allow access to Work Duty Status
      - Display Read-only
      - Update
  - Allow access to Encounter Form
    - Display Read-only
    - Update
  - Allow access to Hearing Conservation
    - Allow access to Encounter Form
      - Display Read-only
      - Update
    - Allow access to Work Duty Status
      - Display Read-only
      - Update
  - Allow access to PFT
    - Allow access to Encounter Form

- Display Read-only
- Update
- Allow access to Work Duty Status
  - Display Read-only
  - Update
- Allow access to Vaccination
  - Allow access to Encounter Form
    - Display Read-only
    - Update
  - Allow access to Work Duty Status
    - Display Read-only
    - Update
- Allow access to Work Duty Status
  - Display Read-only
  - Update
- Attachments
  - Add new
  - Delete
  - Download
  - Edit
  - Email
- Create New
- Delete
- Supplemental Fields
  - Create New
  - Delete
  - Update
  - View
- Update
- View

# Configuration Manager zone settings for Medical Management features

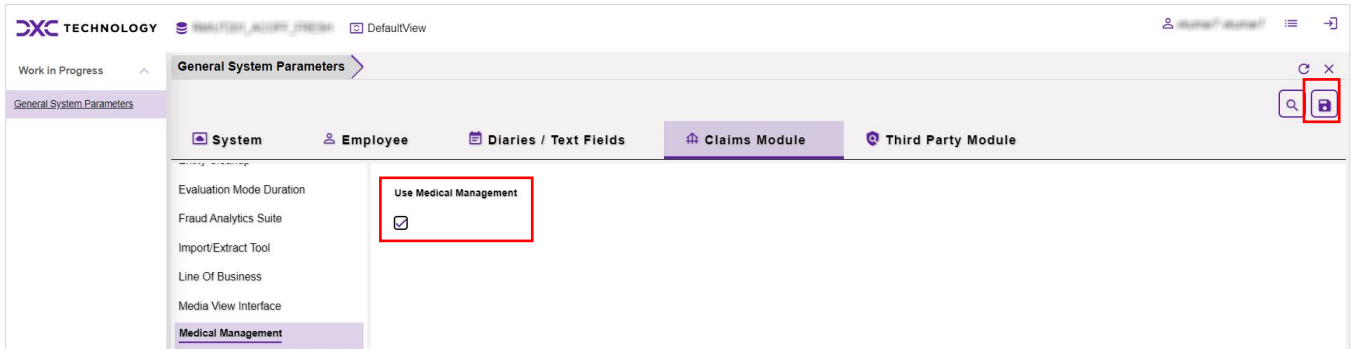
## Enabling the checkbox – Use Medical Management

The DXC Assure Claims administrators can turn on Medical Management by selecting the checkbox **Use Medical Management** via the following path in the Configuration Manager zone:





DXC Assure Claims screen



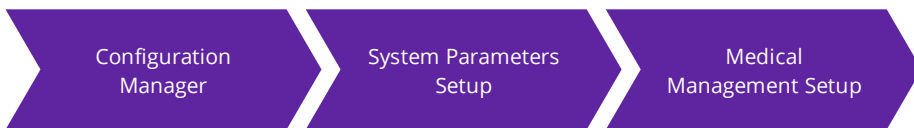
[Fig. 1]

**Note**

- An activation key must be entered to enable the checkbox – Use Medical Management
- Medical Management is a paid feature, and hence you will need to contact the DXC Assure Claims Support Helpdesk or your sales representative for procurement and activation information

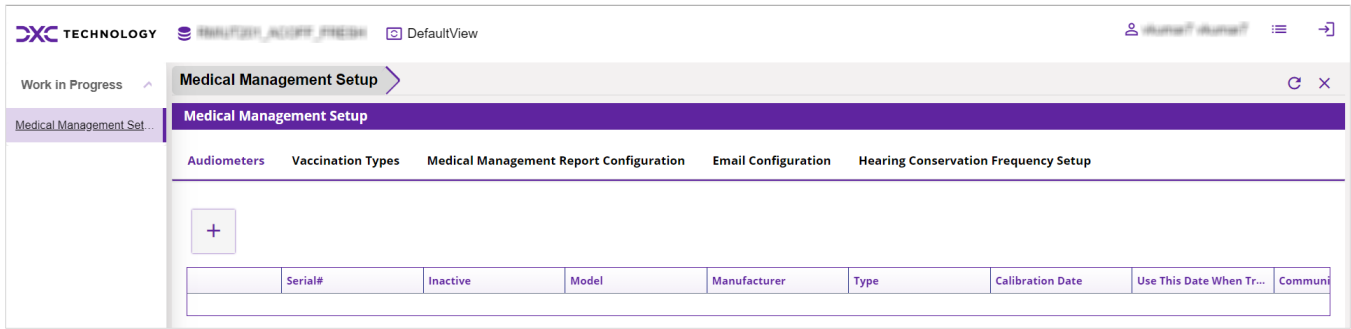
## Configuring the Medical Management Setup screen

The **Medical Management Setup** screen [Fig. 2] is accessible via the following path:



The fields available on the various tabs of the **Medical Management Setup** screen 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.

### DXC Assure Claims screen



[Fig. 2]

The **Medical Management Setup** screen consists of the following tabs:

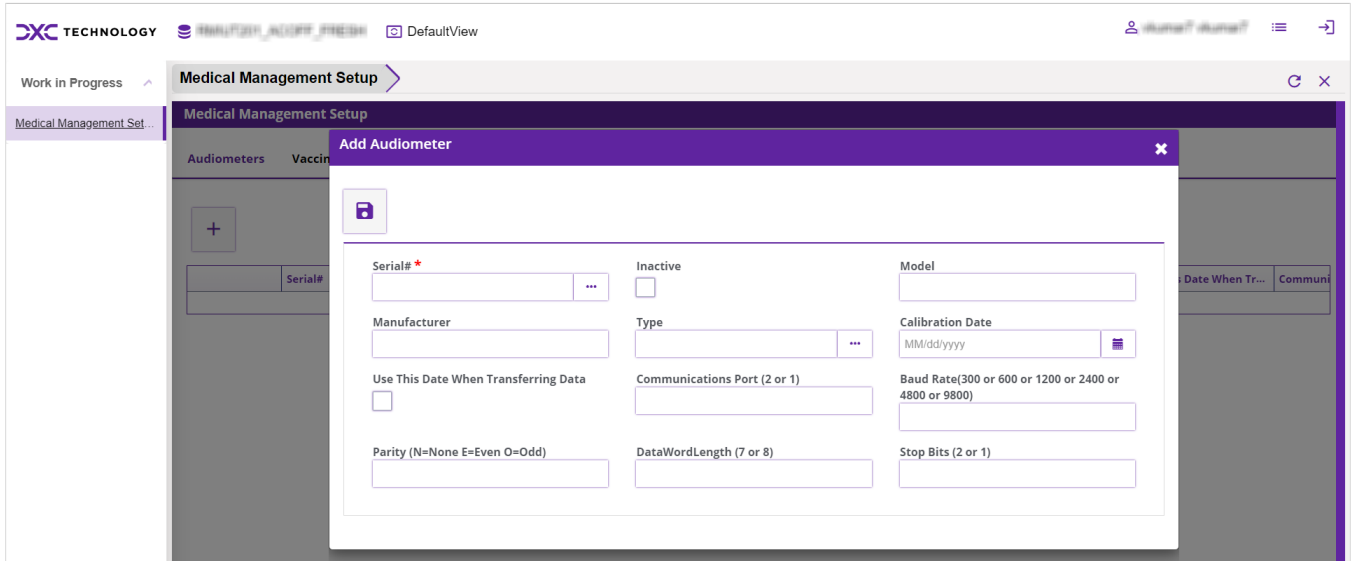
- Audiometers
- Vaccination Types
- Medical Management Report Configuration
- Email Configuration
- Hearing Conservation Frequency Setup

## Audiometers

The **Audiometers** setup tab [Fig. 3] 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)

### DXC Assure Claims screen



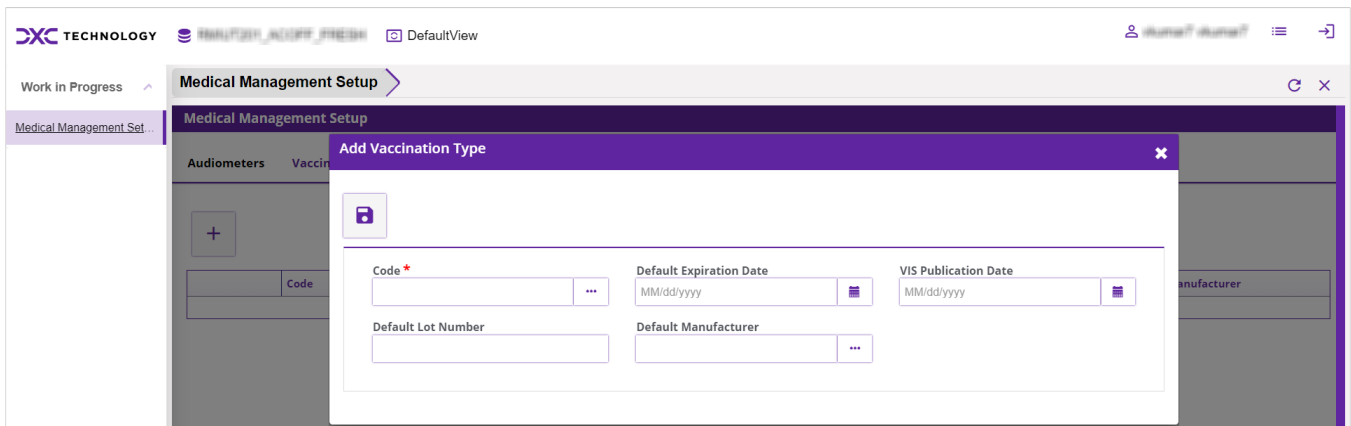
[Fig. 3]

## Vaccination Types

The Vaccination Types tab [Fig. 4] consists of 5 fields –

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

### DXC Assure Claims screen



[Fig. 4]

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

### Note

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

## Medical Management Report Configuration

The information fed into the **Medical Management Report Configuration** tab [Fig. 5] is used to set up 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 consist of the following:

- 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 screen**

The screenshot displays the 'DXC TECHNOLOGY' interface with the 'Medical Management Setup' tab active. The 'Medical Management Report Configuration' sub-tab is selected, showing a form with the following fields:

- Clinic Name:
- Address 1:
- Address 2:
- Address 3:
- Address 4:
- State:  ...
- City:
- Zip:
- Phone:
- Fax:
- Email:
- Hide SSN:
- Logo:  (with an upload icon)

[Fig. 5]

## Email Configuration

The **Email Configuration** tab [Fig. 6] on the **Medical Management Setup** screen 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.

**DXC Assure Claims screen**

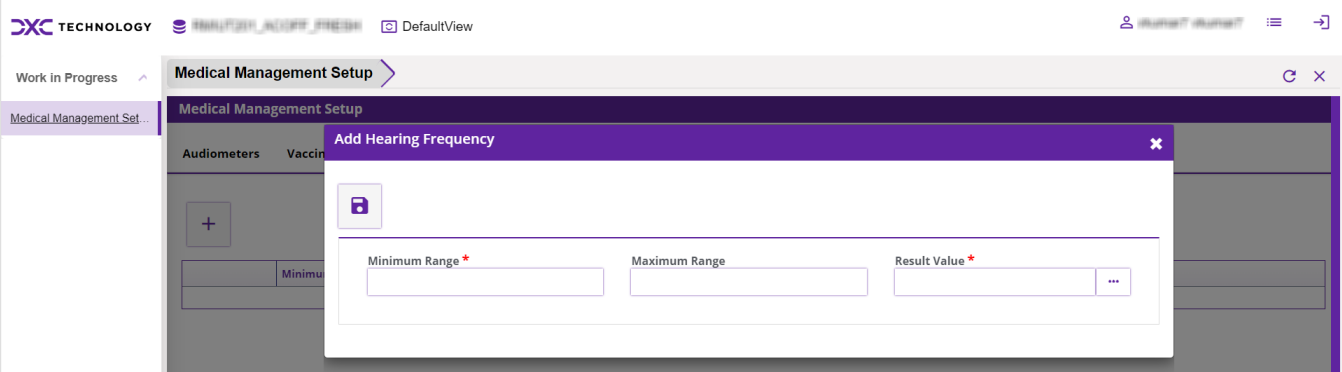
The screenshot displays the 'Medical Management Setup' screen with the 'Email Configuration' tab selected. The interface includes a top navigation bar with the DXC Technology logo and user information. Below the navigation bar, there are tabs for 'Audiometers', 'Vaccination Types', 'Medical Management Report Configuration', 'Email Configuration', and 'Hearing Conservation Frequency Setup'. The 'Email Configuration' section is divided into two parts: 'Reports Email Configuration' and 'Appointment Email Configuration'. Each part contains input fields for 'From Email Address', 'To Email Address', and 'CC Email Address'. The 'Appointment Email Configuration' section also includes a 'Reminder Days' field with a value of 0 and a 'Location' field.

[Fig. 6]

## Hearing Conservation Frequency Setup

The **Hearing Conservation Frequency Setup** tab [Fig. 7] on the **Medical Management Setup** screen is used to determine the **Frequency Range** and the results displayed on the **Hearing Conservation Data Entry** accordion.

### DXC Assure Claims screen



[Fig. 7]




# Using Medical Management

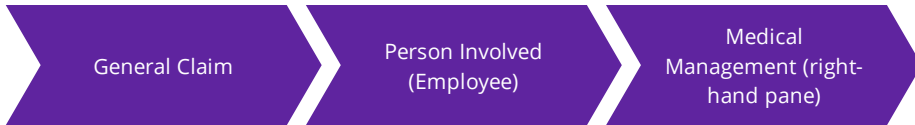


## Creating & Working with a (New) Medical Management Record

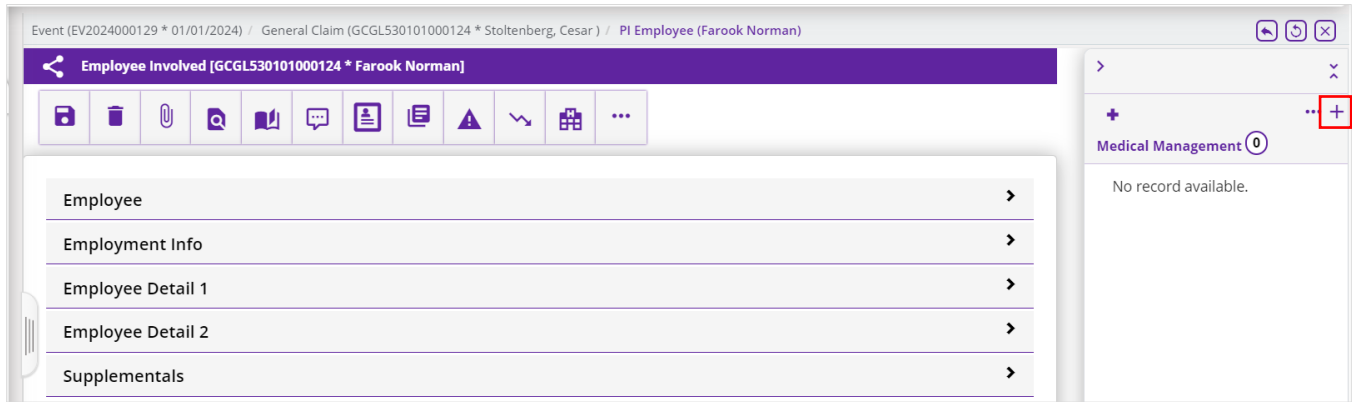
When all requisite Security and Configuration Manager zone settings have been performed and enabled, the Medical Management screen can be accessed from one of the following:

- Employee Maintenance screen
- Event screen
- General Claim screen
- Workers' Compensation Claim screen
- Property Claim screen
- Vehicle Accident screen
- Health Claim screen
- Litigation screen
- Policy screen

As a case in point, **Medical Management** accessed via a **General Claim** is being considered in this document. To create a new **Medical Management** record, select the **Add**  icon from the right-hand pane on the **PI Employee** screen. [Fig. 8]



### DXC Assure Claims screen

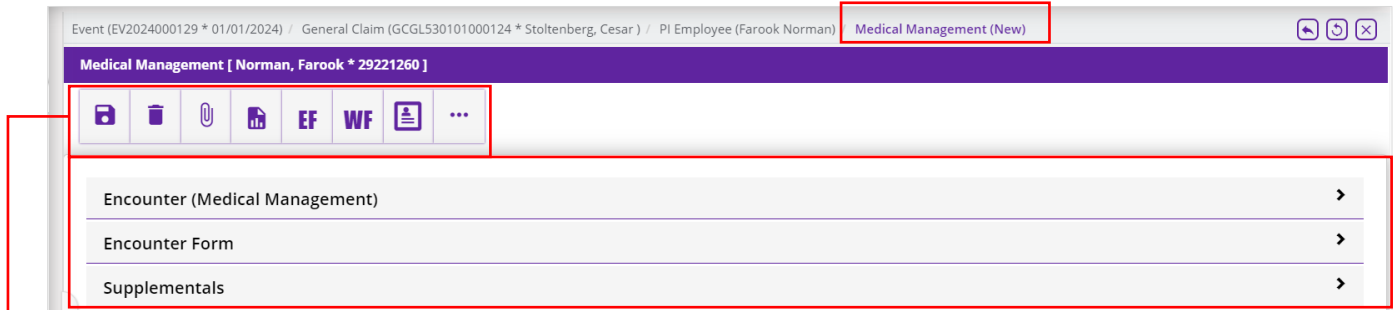


[Fig. 8]

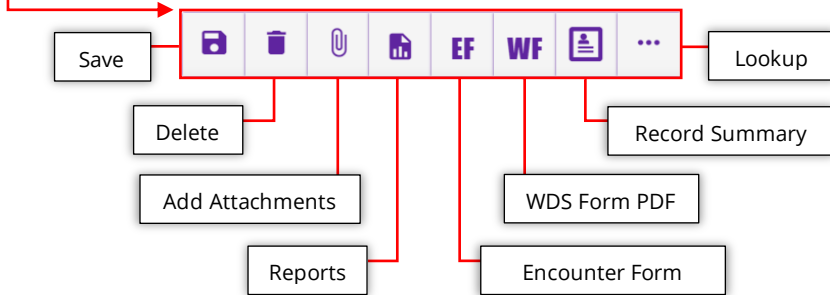
## Medical Management screen

When the above-mentioned SMS settings are enabled, the Medical Management screen can be accessed via the Add icon. [Fig. 9]

### DXC Assure Claims screen



[Fig. 9]





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

- **Toolbar buttons**
  - Save
  - Delete
  - Add Attachments
  - Reports
  - Encounter Form
  - WDS Form PDF
- Record Summary
- Lookup
- **Accordions**
  - Encounter (Medical Management)
  - Encounter Form
  - Supplementals

## Encounter (Medical Management) Accordion

The **Encounter (Medical Management)** accordion [Fig. 10] consists of the following widgets, fields, and checkboxes:

**DXC Assure Claims screen**

The screenshot shows the 'Medical Management [Norman, Farook \* 29221260]' screen. The 'Encounter (Medical Management)' accordion is expanded, showing fields for Date\*, Time, Encounter Type Description\*, Encounter Type\*, Clinic, Examiner, Treatment, Work Related, Worker's Comp, Encounter Notes, and For Appointment. A red box highlights the 'Encounter Type\*' field, and a red arrow points to a pop-up window titled 'Encounter Type'.

**Encounter Type**

Code	Description	Parent Code
0	No Tab Details	
1	Drug Testing	
2	Alcohol	
3	Hearing Conservation	
4	Vaccination	
5	Hepatitis B	
6	Tuberculosis/PPD	
7	Titers	
8	Pulmonary Functions	

Showing 9 items of 9

**[Fig. 10]**

- **Date\*** (mandatory)
- **Time**
- **Encounter Type Description\*** (mandatory)
- **Encounter Type\*** (mandatory)
- **Clinic**
- **For Appointment**
- **Work Related** (checkbox)
- **Workers' Comp** (checkbox)

- Attached To (read-only)
- Examiner
- Treatment
- Encounter Notes

To create a new Encounter, enter requisite data in the mandatory fields – **Date**, **Encounter Type Description**, and **Encounter Type**. [Fig. 10]

## Automatic addition of accordions based on “Encounter Type” selection

For every selected **Encounter Type** (if SMS permission is enabled), two more accordions will be added to the screen. These are:

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

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

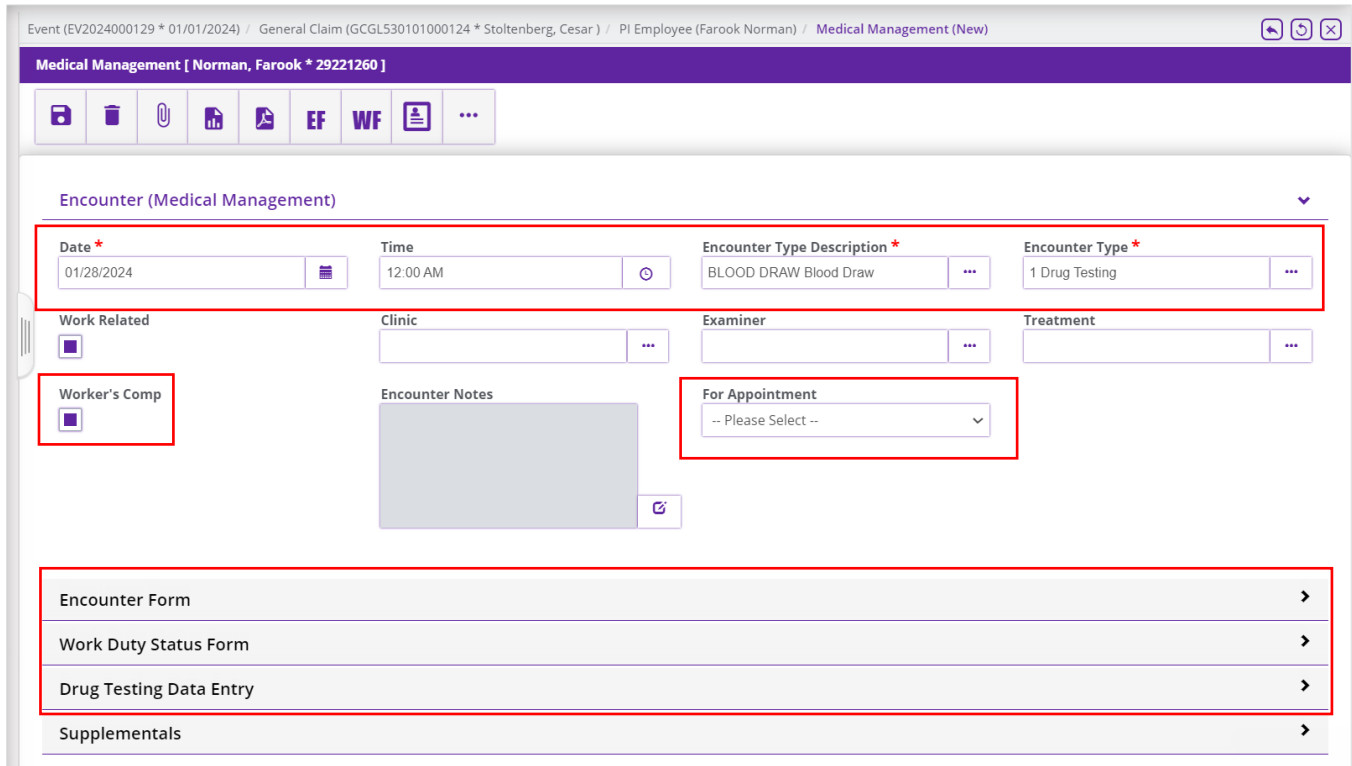
E.g.: When “**Drug Testing**” is selected as the **Encounter Type** [Fig. 11], then the additional accordions added to the screens will be:

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

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

### DXC Assure Claims screen



[Fig. 11]

#### Prerequisite SMS Permissions

- 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

Based on SMS permission for View on Update, an existing Medical Management record can accordingly be viewed and/or updated.

#### 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

An existing Medical Management record can be deleted based on requisite SMS permission.

### Note

- Users with SMS permissions can delete any Medical Management record(s) 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' 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.

### Conditions under which the 'Encounter Form' accordion becomes available

- The **Encounter Form** accordion is available for all **Encounters**
- But the fields of the **Encounter Form** accordion will only be accessible if the checkbox labeled **Workers' Comp** is selected [Fig. 11] 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 populated based on the **master Employee record** in the DXC Assure Claims database
- Any changes made to the 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** [Fig. 12]

### 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)
  - Display Read Only (checkbox)
  - Update (checkbox)

**DXC Assure Claims screen**

The screenshot displays the 'Work Duty Status Form' for employee Farook Norman. The form includes the following fields:

<b>Today's Date</b> 02/25/2024	<b>Time In</b> 1:17 PM	<b>Employee Name</b> Farook Norman	<b>Time Out</b> ...
<b>Address</b> HR Testing Sample Address One 1936, HR Tes	<b>Social Security#</b> 192064137	<b>Country</b> USA United States	<b>City</b> North Little Rock
<b>Department</b> 530201-Department	<b>State</b> NY New York	<b>Contact Cell/Home Phone</b> 9876512059	<b>Zip/Postal Code</b> 68068

Additional fields include: **Contact Work Phone**, **Employee States Illness/Injury is:**, and **Occupational Claims Only Provider Determination is:**.

[Fig. 12]

# Various 'Encounter Types'

Currently, there are 8 different **Encounter Types** supported in DXC Assure Claims. [Fig. 10]

## Encounter Type Names

Supported Encounter Types are:

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

**For e.g.:** To enable 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)

## Selected 'Encounter Type' vis-à-vis its corresponding auto-generated accordion(s)

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

Encounter Type Selected	Corresponding Auto-generated Accordion
Drug Testing	Drug Testing Data Entry
Alcohol	Alcohol Data Entry
Hearing Conservation	Hearing Conservation Data Entry Hearing Conversation Analysis Hearing Conservation Test Listing

Vaccination	Vaccination Listing Vaccination Data Entry Compliance
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

### *Information about ‘Encounter Type’ – ‘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. 13] will be **auto-populated** based on the data entered in **Medical Management Setup** in the Configuration Manager zone.

### DXC Assure Claim screen

The screenshot shows the 'Hearing Conservation Data Entry' form within the 'Medical Management' application. The form is organized into several sections:

- Test Information:** Test Date\* (01/31/2024), Test Time, Clinic, Test Type.
- Personnel and Calibration:** Serial# (highlighted with a red box), Examiner, Calibration (MM/dd/yyyy, highlighted with a red box), Exposure.
- Additional Data:** Noise Level, Re-Test (MM/dd/yyyy), ReCmd, Reviewed (MM/dd/yyyy).

[Fig. 13]

- 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.
- The tab – **Hearing Conservation Frequency Setup** [Fig. 14] available on the **Medical Management Setup** screen in the **Configuration Manager** zone is used 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 screen

The screenshot shows the 'Medical Management Setup' screen with the 'Add Hearing Frequency' dialog box open. The dialog box contains the following fields:

- Minimum Range\*:** A text input field.
- Maximum Range:** A text input field.
- Result Value\*:** A text input field with a dropdown arrow.

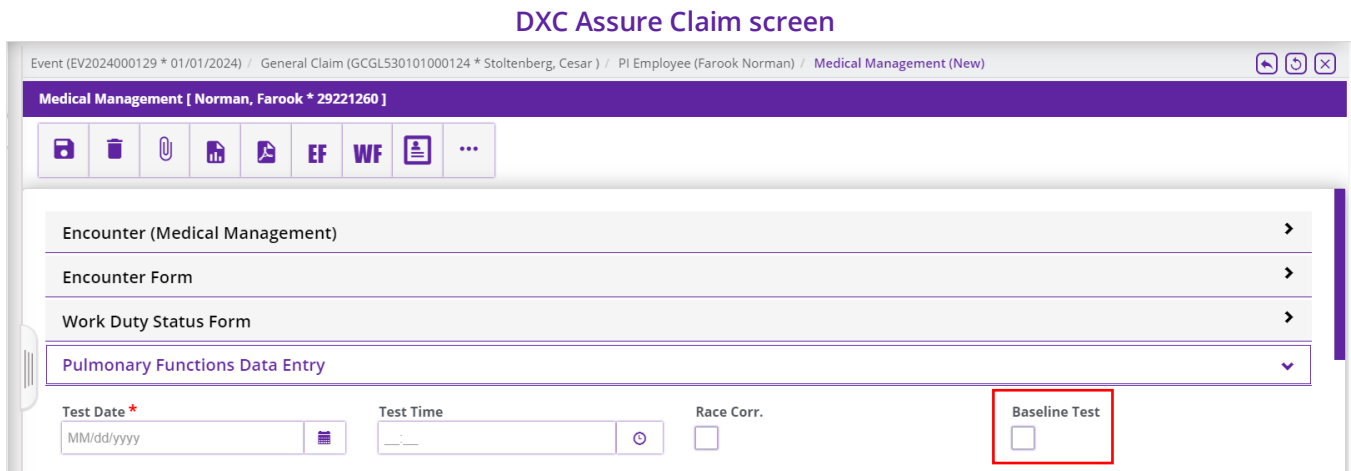
[Fig. 14]



## Pulmonary Functions

When the Encounter Type is **Pulmonary Functions**:

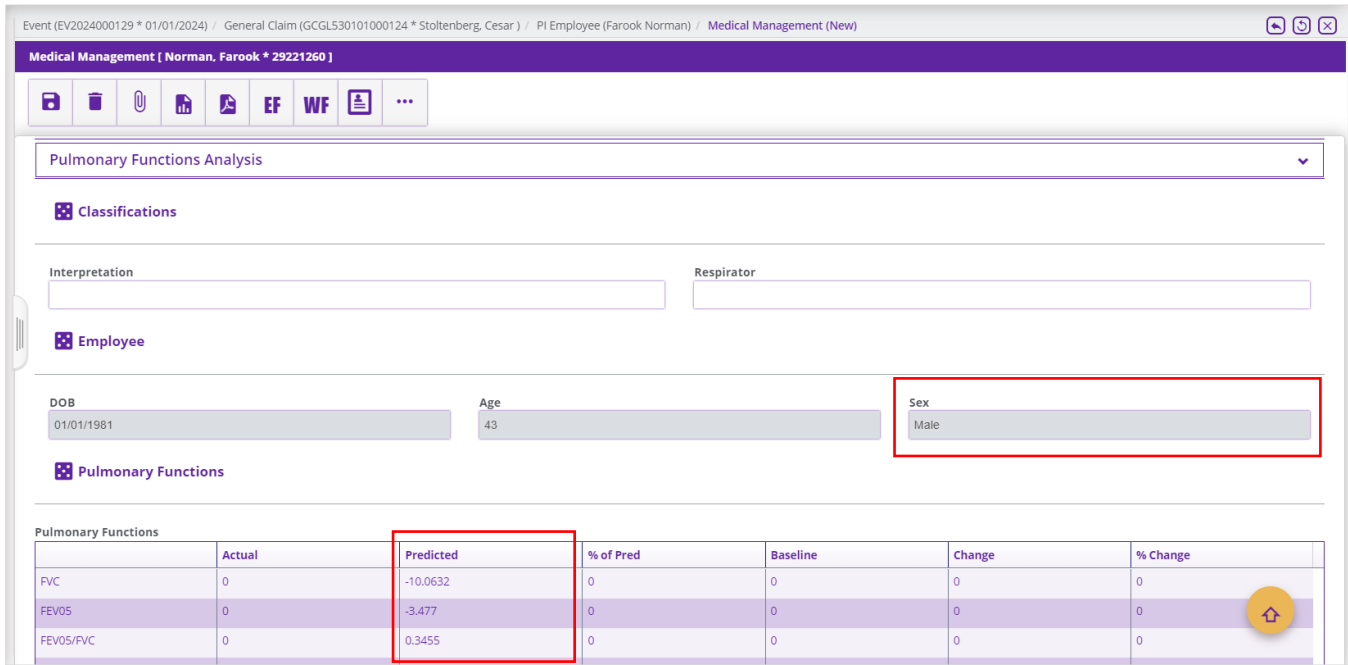
- The following fields present in the **Results** section of the **Pulmonary Functions Data Entry** accordion are added to the grid present in the **Pulmonary Functions Analysis** accordion. These fields are:
  - FVC
  - FEV05
  - FEV05/FVC
  - FEV1
  - FEV1/FVC
  - FEV3
  - FEV3/FVC
  - FEF25
  - FEF50
  - FEF75
  - FEF25-75
  - PEFR (Displayed in the grid as PEF).
- The checkbox – **Baseline Test**, allows a record to be set as a baseline and compares the rest of the records based on its values. [Fig. 15]



[Fig. 15]

- In the **Pulmonary Functions Analysis** accordion the comparison of readings with the baseline record is made. The value in the **Predicted** column is calculated according to the **age** and **gender** of an employee.

### DXC Assure Claim screen



[Fig. 16]

- If the gender of an employee is not added, then predicted values will not be calculated

## Titers

- The **Titers History** accordion displays data in the form of a grid with 4 columns namely:
  - **Titers Type**
  - **Date**
  - **Result**
  - **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 that are specific to the accordion, but some fields and lists that display data from other accordions 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 the Encounter type is Tuberculosis, the data is displayed in the PPD section.

### CXR

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

### Vaccines

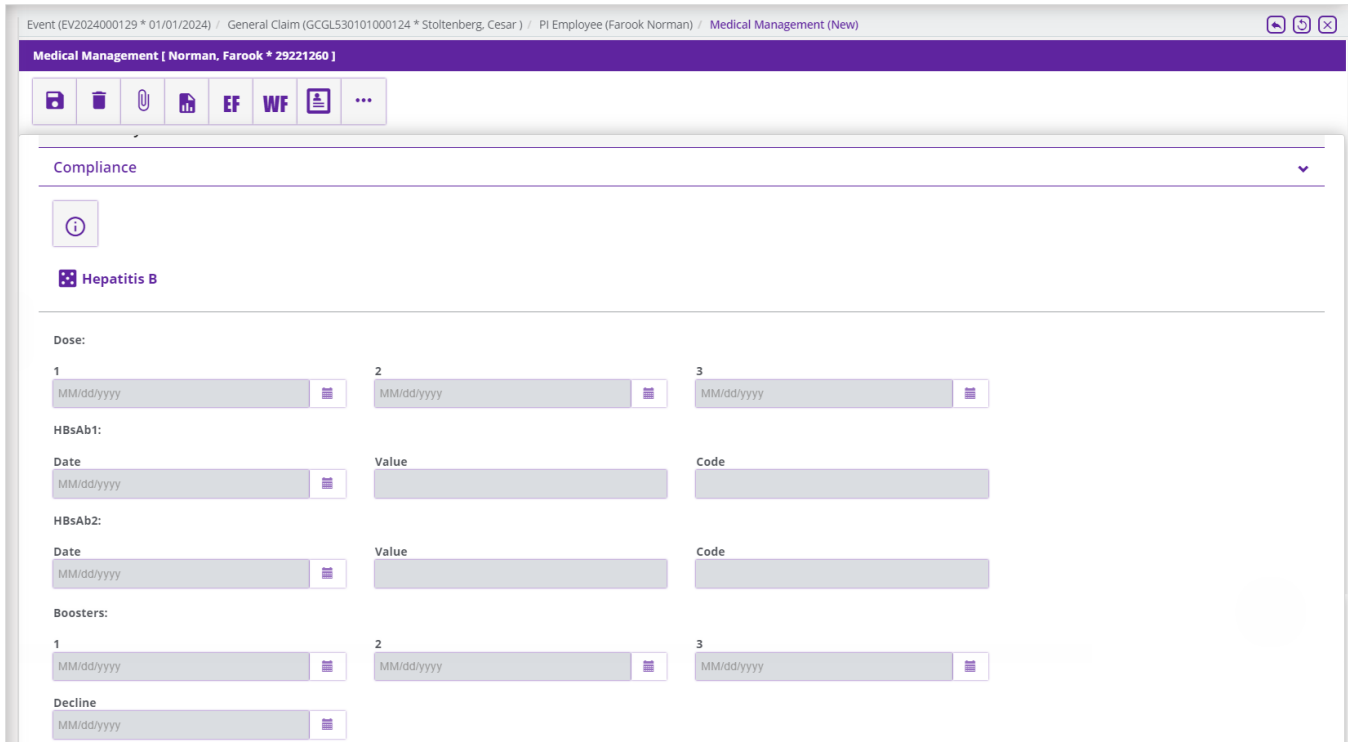
- This section consists of the lists of all vaccines added for the employee.

### Titers

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

The screenshots below [Fig. 17], [Fig. 18], and [Fig. 19] show the various components of the **Compliance** accordion.

### DXC Assure Claim screen



[Fig. 17]

### DXC Assure Claim screen

**Exams/Training Required**

---

**Bloodborne Pathogen Training:**

Due Date        Last Exam Date

**Pre-Employment:**

Due Date        Last Exam Date

**Pulmonary Function Test:**

Due Date        Last Exam Date

**Tetanus:**

Due Date        Last Exam Date

**Vision Test:**

Due Date        Last Exam Date

**Hepatitis B Vaccine:**

Due Date        Last Exam Date

[Fig. 18]

### DXC Assure Claim screen

**PPD**

---

**PPD Details**

Date Given	MM Reaction	Result

**Prophylaxis:**

Start        End        Decline

**CXR**

---

**Last CXR**

**Vaccination Details**

---

**Vaccination Details**

Vaccine Immunization Types	Date

**Titers Details**

---

**Titers Details**

Titer Type	Date	Result	Susceptible

**Supplementals** ➤

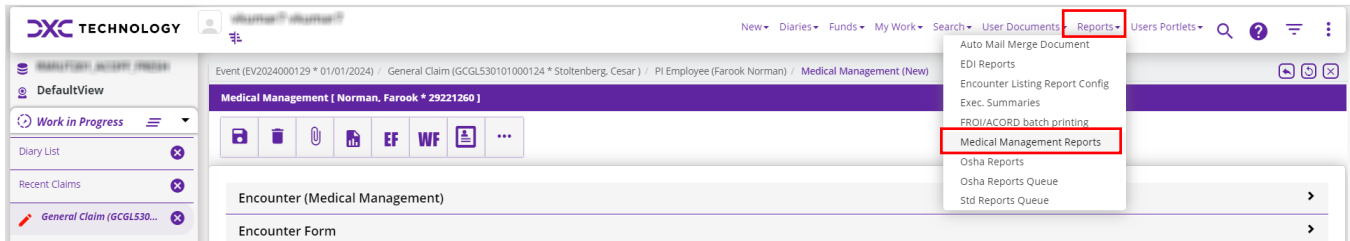
[Fig. 19]

# Reports

## Access via Primary Toolbar

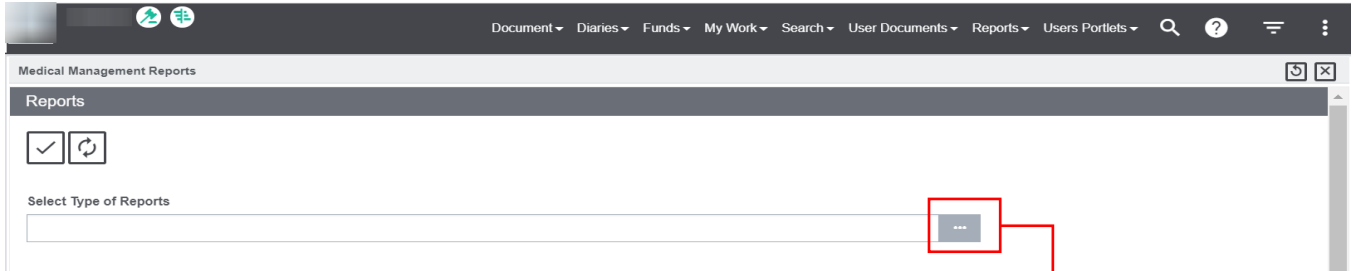
The Reports option on the primary menu bar can be used to navigate to the **Medical Management Reports** screen.

DXC Assure Claims screen



[Fig. 20]

DXC Assure Claims screen

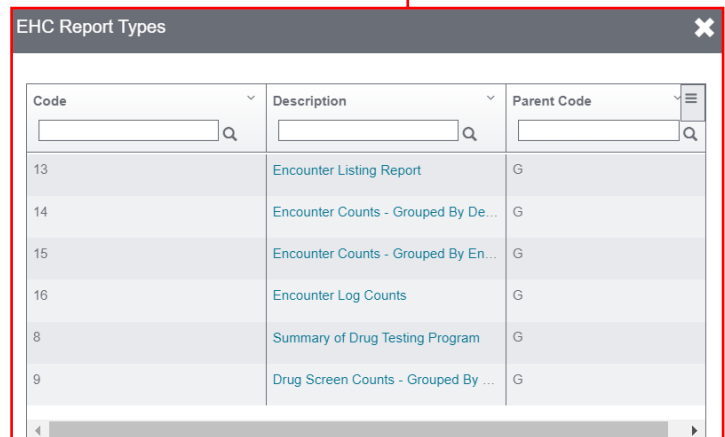


[Fig. 21]

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, and 16 are listed on the EHC Report Type popup window. [Fig. 21]

Selecting a Description link against a given Code number opens the Reports (Filter Criteria) screen. [Fig. 22]



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

### DXC Assure Claims screen



[Fig. 22]

## Access via Medical Management Screen

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

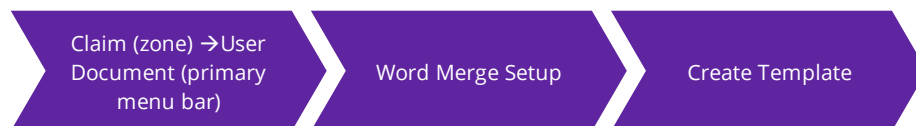
The reports button is provided in the toolbar button of medical management to fetch reports. Individual reports of types 1, 2, 3, 4, 5, 6, 7,10,11, and 12 are displayed on the EHC Report Types popup window (like that shown in [Fig. 21]).

## Email Configuration for Appointments

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

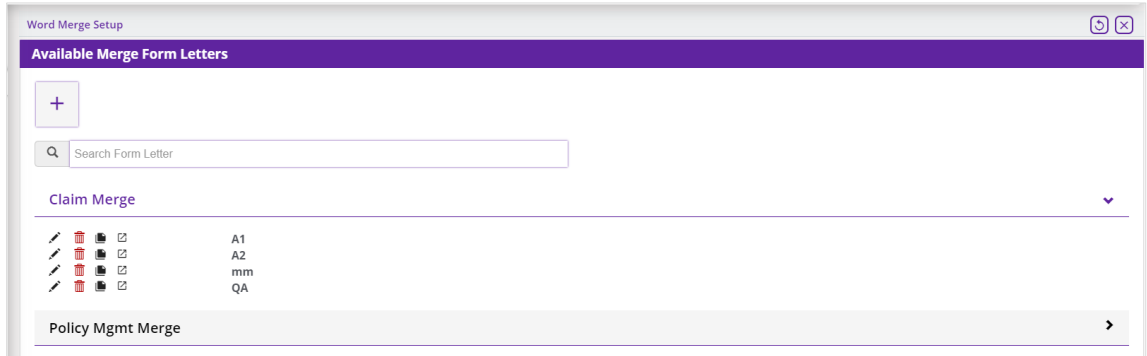
### 1. Create an Employee Mail Merge template

- Access the Word Merge Setup screen



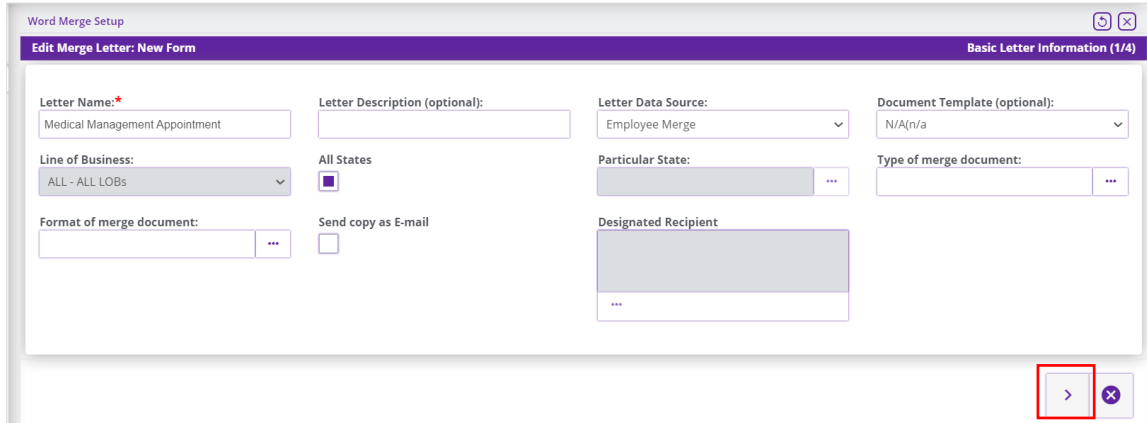
- Select the Create Template  button [Fig. 23] to open the **Edit Merge Letter: New Form** screen. [Fig. 24]

### DXC Assure Claims screen



[Fig. 23]



### DXC Assure Claims screen



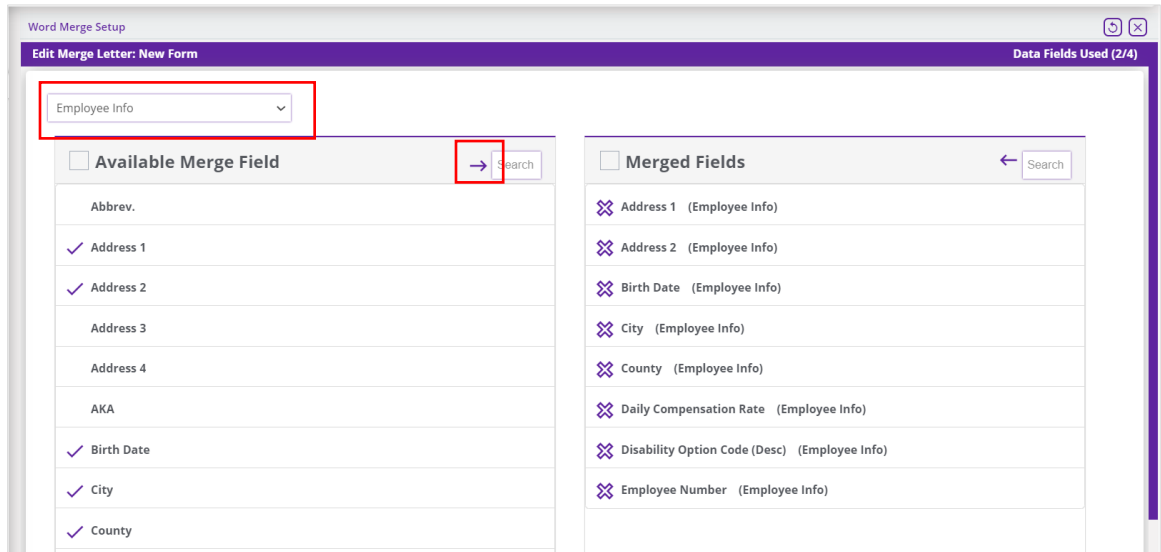
[Fig. 24]

- Fill up all mandatory fields and select the Next button [Fig. 24] to navigate to the next screen.

## 2. Select a Category [Fig. 25] 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.

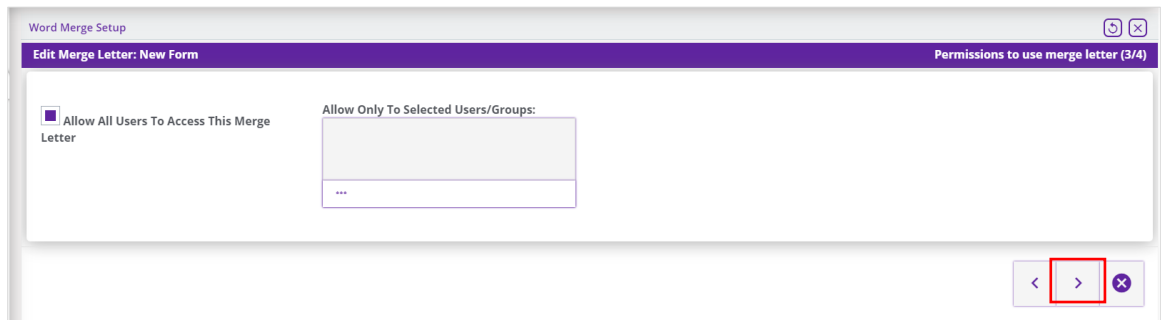
### DXC Assure Claims screen



[Fig. 25]

3. On the Permission to Use Merge Letter screen [Fig. 26], choose appropriate permissions and select the Next  button.

### DXC Assure Claims screen

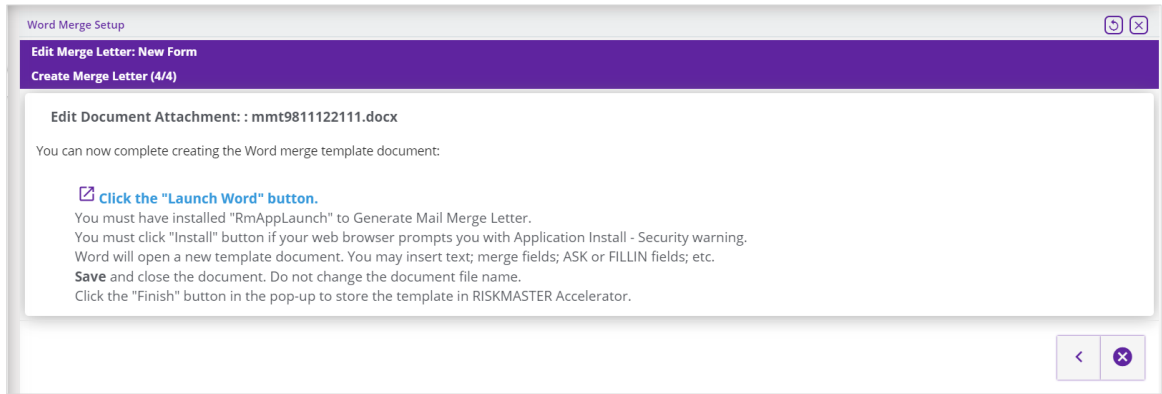


[Fig. 26]

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 [Fig. 29]

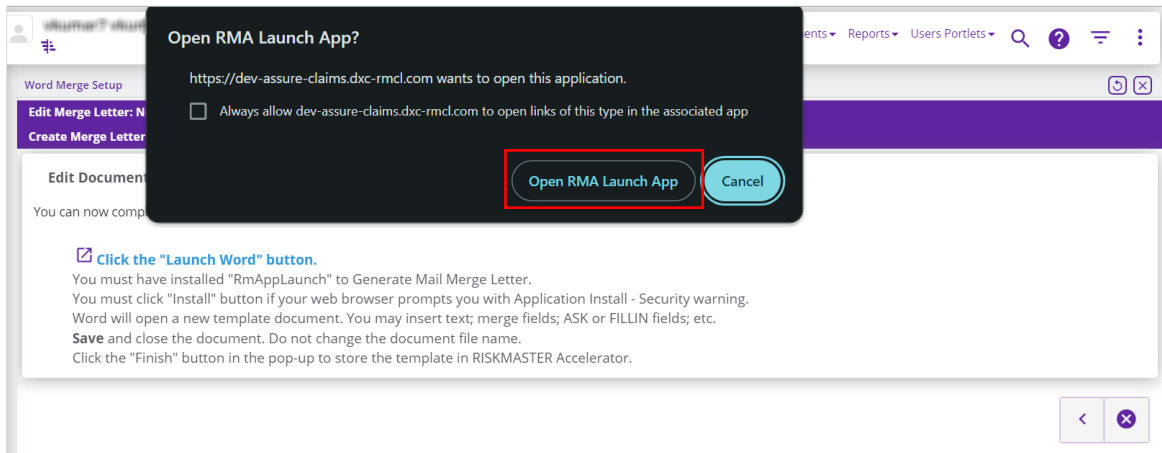


### DXC Assure Claims screen



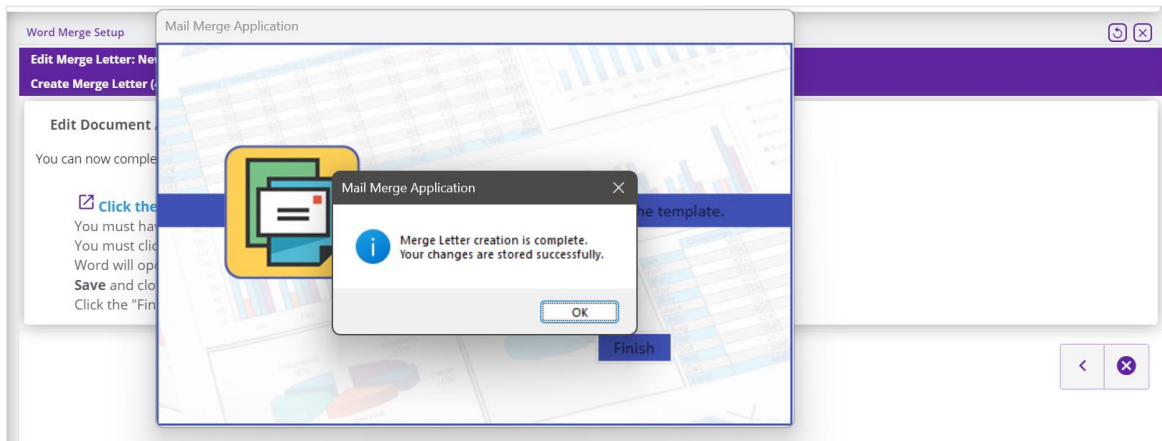
[Fig. 27]

### DXC Assure Claims screen



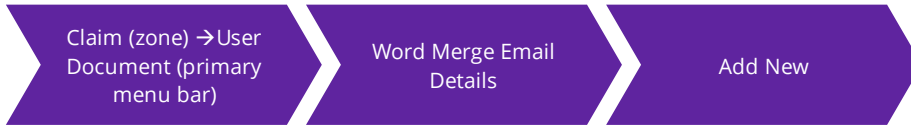
[Fig. 28]


### DXC Assure Claims screen



[Fig. 29]

- 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. [Fig. 30]

- Provide all necessary information followed by selecting the Save button.

### 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 screen

Word Merge Email Details Setup

**Email Template**

Template \*  Email From Address

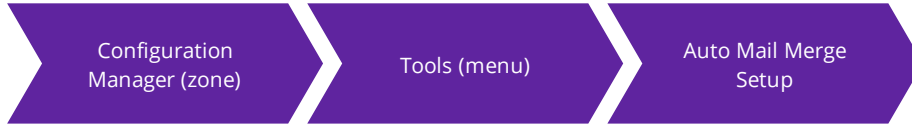
**Email Subject Line**

Variable  Email Subject \*

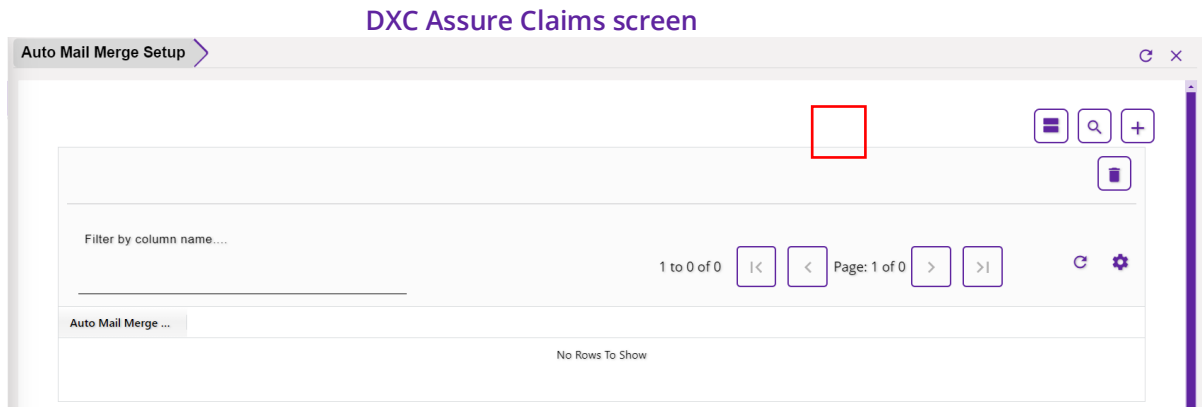
[Fig. 30]

## Auto Mail Merge Setup for Appointments

- Now, go to Auto Mail Merge Setup which is accessed via the Tools and Designers menu of the Utilities zone. [Fig. 26]

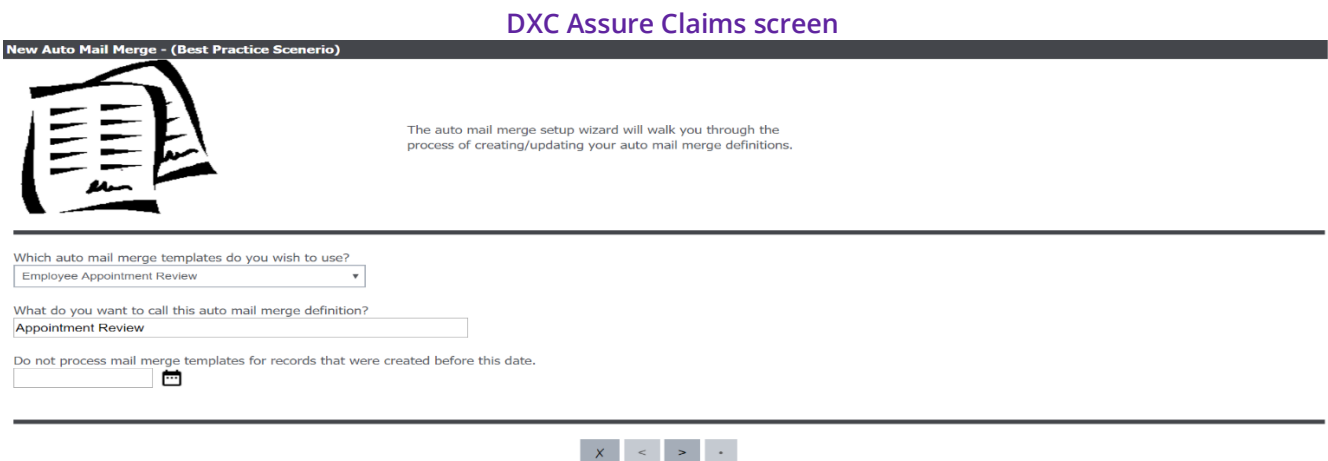


- Select the New button to open the Auto Mail Merge Creation - (Introduction) popup window.



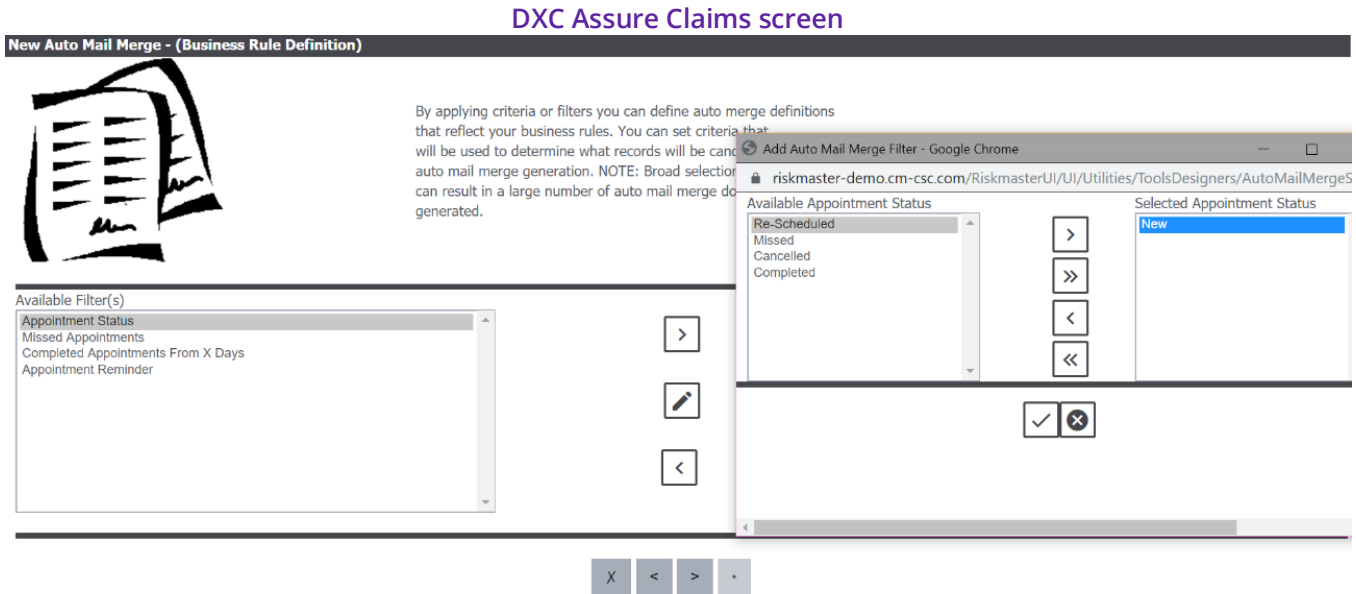
[Fig. 26]

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



[Fig. 27]

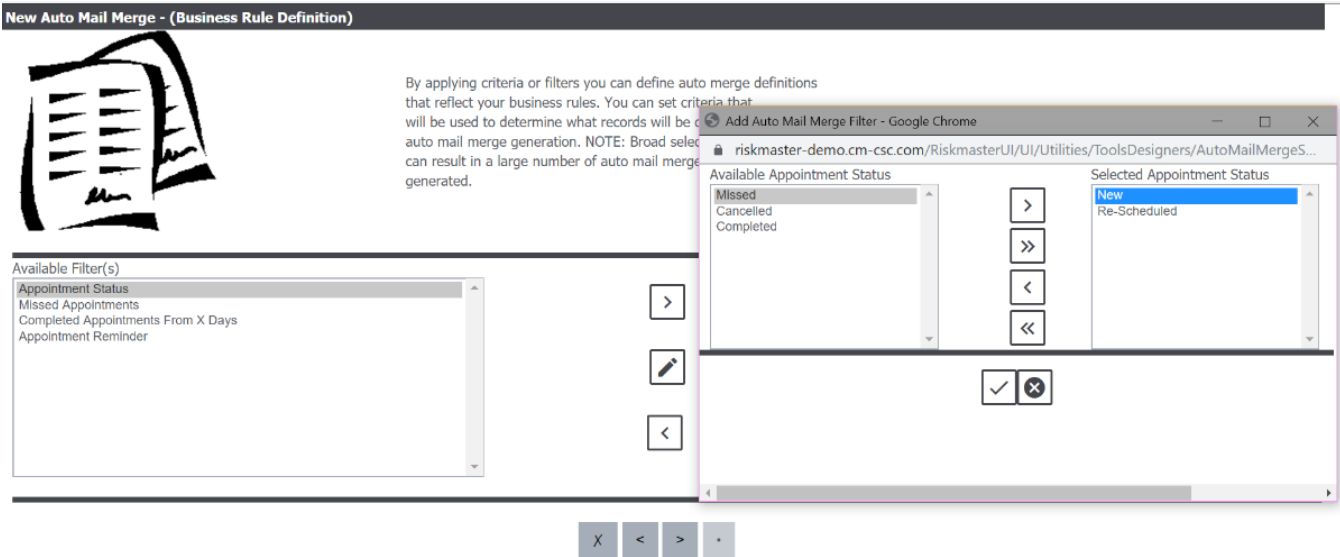
- 9. Use the filters to create an Auto Mail Merge setup to address the Employee’s behavior (keeping/missing/canceling an appointment).
  - a. Creating a New Appointment – Use Appointment Status code filter with the short code as New. [Fig. 28]



[Fig. 28]

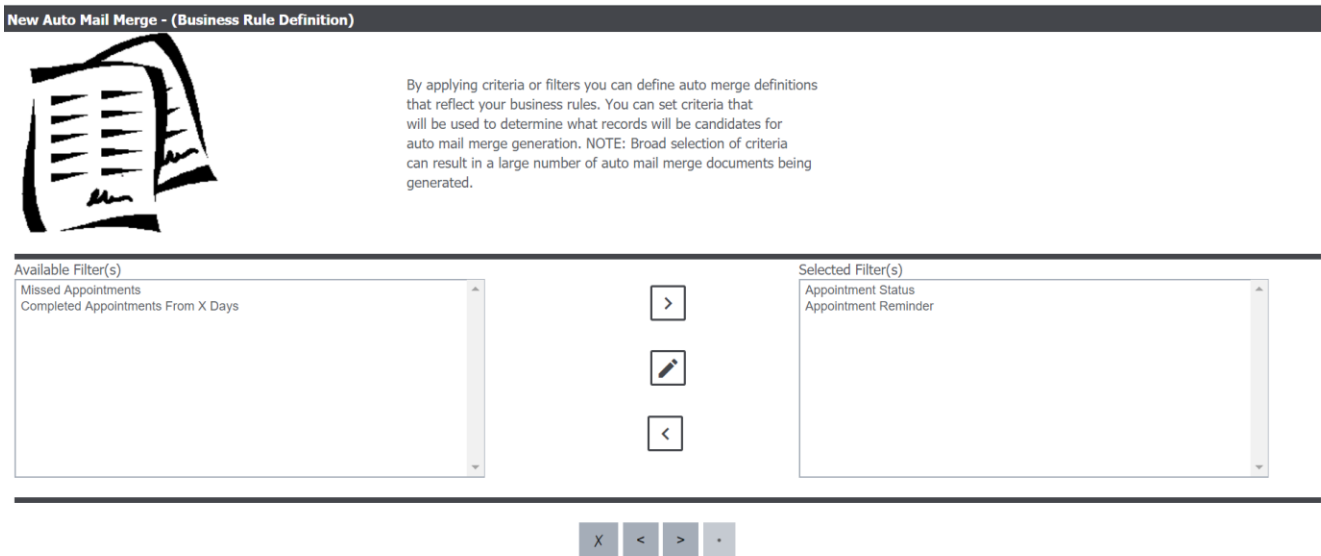
- b. Rescheduling an Appointment – Use the Appointment Status code filter with short code as Reschedule.
- c. Cancelling an Appointment – Use the Appointment Status code filter with the shortcode as Cancelled.
- d. Reminding for an Appointment – Use the Appointment Status code filter as New and Reschedule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

### DXC Assure Claims screen



[Fig. 29]

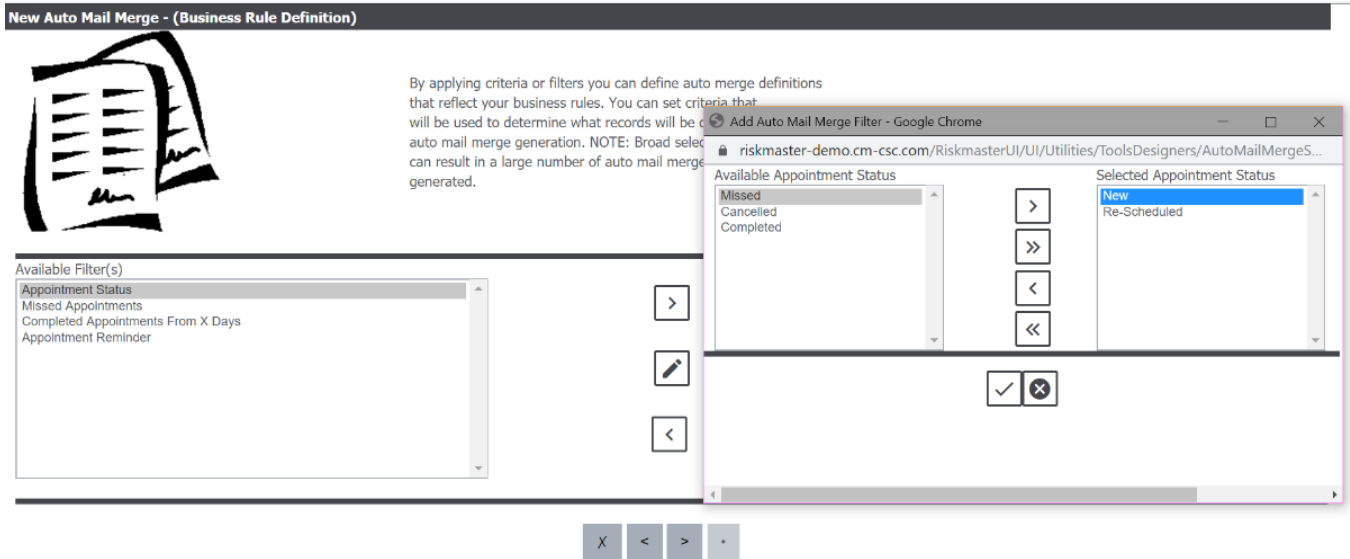
### DXC Assure Claims screen



[Fig. 30]

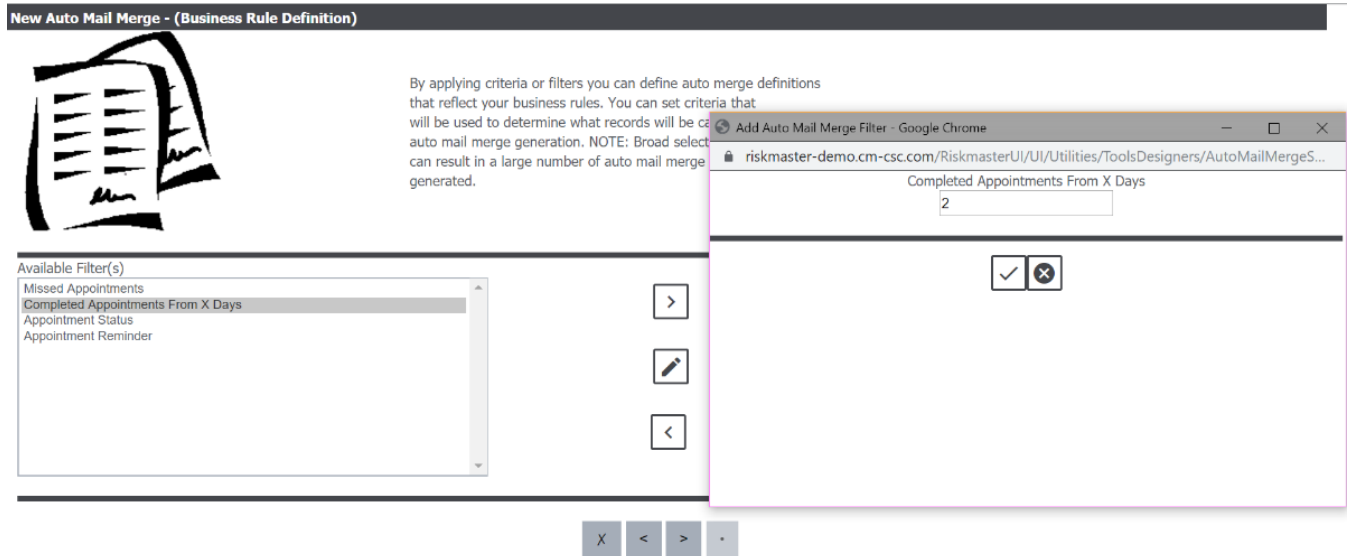
- e. Completing an Appointment – Use the Appointment Status code as New and Reschedule for inclusions and add the filter Completed Appointment From X-Days [Fig. 31]. Hence when X-days [Fig. 32] have passed then the Appointment would be marked as Completed. [Fig. 33]

### DXC Assure Claims screen



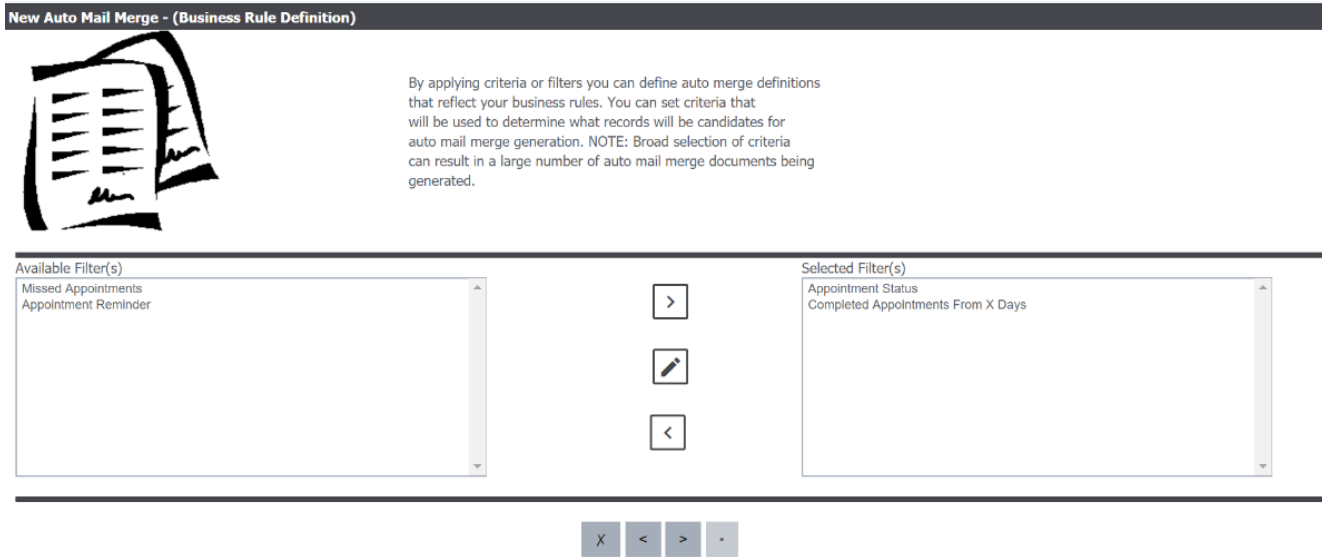
[Fig. 31]

### DXC Assure Claims screen



[Fig. 32]

## DXC Assure Claims 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 will 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 before Appointment is matched then a Reminder email would be sent. The Reminder Days are set in the Medical Management Setup screen.

## 12. Complete Appointment Email

Whenever the Appointment is used while creating a Medical Management record the system will change the status as completed and an 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 the system considers the appointment as Missed and its status changes to Missed along with 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: The user can select any of the 'Employee Merge' templates 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 the Appointment screen)
  - Location: (Override allowed at Appointment screen)

As the system will use the Auto Mail Merge Templates to create 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 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.  
[Date Picker]

---


X < > .

[Fig. 34]

Select the filter "Email Medical Management Form" and Save. [Fig. 35]

### DXC Assure Claims 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
	✎	
	<	

---

X < > .

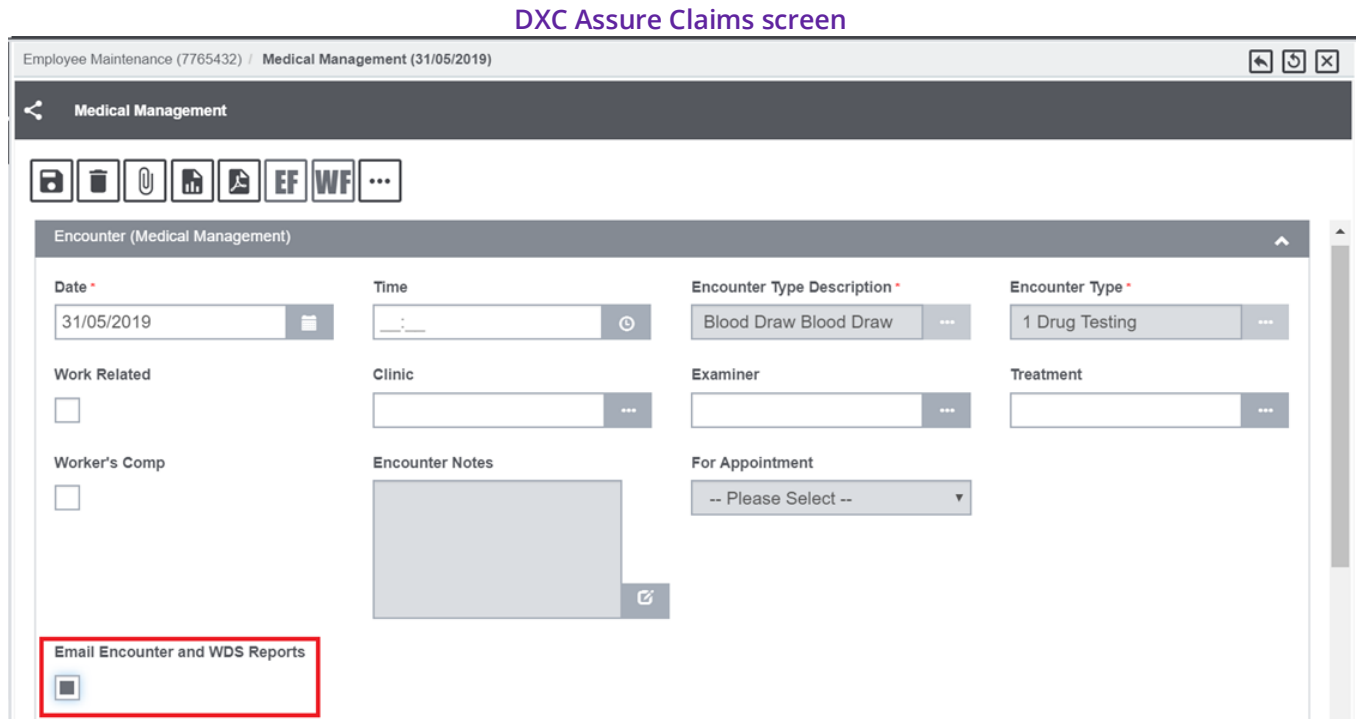
[Fig. 35]

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 the 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.

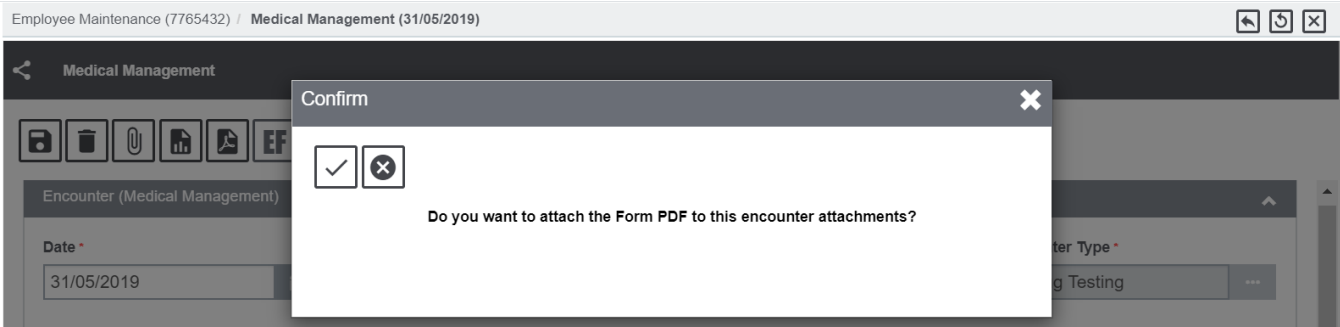


[Fig. 36]

## Attaching encounter form and WDS form to the 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 screen



[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.





## About DXC Technology

DXC Technology (NYSE: DXC) helps global companies run their mission-critical systems and operations while modernizing IT, optimizing data architectures, and ensuring security and scalability across public, private and hybrid clouds. The world's largest companies and public sector organizations trust DXC to deploy services to drive new levels of performance, competitiveness, and customer experience across their IT estates. Learn more about how we deliver excellence for our customers and colleagues at [DXC.com](https://www.dxc.com).

## Follow DXC Technology on social media

Get the insights that matter.



Keep up to date with technology and innovation, now and in the future.

## DXC Assure Claims Support Helpdesk

**Phone:** 1-877-275-3676

**Email:** [risksupp@dxc.com](mailto:risksupp@dxc.com)