PNS Follow-Up and Contracts Unit

Slide 1 - Welcome

Slide notes: Welcome to the PNS Follow-Up and Contracts Unit Course.
Click the Begin Course button or press Enter on your keyboard to start.

Slide 2 - Course Navigation

Slide notes: You can use the following buttons in the player to navigate this course.

- Click the Rewind button to replay a slide.
- Click the Pause/Play button to pause the slide or to play the paused slide.
- Click the Back button to return to the previous slide.
- Click the Forward button at the end of each slide to move on to the next slide.
- Click the Mute button to mute the audio and then turn it back on, if required.
- Click the Closed Captioning button to view closed captions of the narrative audio.
- Click the Exit button to exit from the course.

You can also view completion status of the topics in the Table of Contents.
Please note at the end of each lesson, there will be a knowledge check to be completed before advancing to the next lesson.

Slide 3 - Course Introduction
Slide notes: The PNS Follow-Up and Contracts Unit course provides an overview of core day-to-day activities for GDSP PFAC staff.

While a specific functionality in SIS depends on a user's security accesses, this course introduces the common functionalities available to all PFAC staff.

Slide 4 - Course Objectives

Slide notes: On completion of this course, you will be able to:

- View Patient and Case records
- Navigate to and edit Specimen records and refer specimens
- Navigate to and view appointments
- Review Special Authorization Requests and complete specific tasks
- Review PSRs and complete specific tasks
- Locate and view invoices

Slide 5 - Lesson Objectives

Slide notes: Welcome to the General Records lesson of this course.
At the end of the lesson, you will be able to View Patient and Case records.

Slide 6 - GDSP Dashboard

Slide notes: After you sign in using steps previously covered in SIS 2.0 General Functionality module, you will land on the Application Selection window displaying your available application tiles.

As a PFAC user, click on the user App PNS - GDSP to access the landing page to begin.

Slide 7 - Patient Records

Slide notes: You will be able to navigate to and view and edit the Patient records in SIS across the entire program. If you know the patient’s name, you can also perform a global or custom search to quickly access the record. You can also access a Patient record from the associated Specimen record.

Please note, while changes to the Patient record are rare, updates to either the patient’s date of birth or race/ethnicity fields will impact interpretation.

Slide 8 - Introduction to Case Records

Slide notes: You can navigate to a Case record from either the Patient or a Specimen record. Alternatively, you can search for a specific Case ID from the Global Search bar. Select the Case ID to access the record where you can read, edit, and attach files as necessary.

Case records contain three tabs:

- Summary
- Case Timeline
- Related tab - that contain the Audit and Service History

The case timeline displays all the information associated with the case as timeline items. The data on a case timeline captures all the major events on a case, including supporting documents such as case coordinator notes, attachments, results mailers, and PDC summary.

Slide 9 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.

What are the options available to access a patient record?

Select the correct options.

Slide 10 - Lesson Objectives

Slide notes: Welcome to the Specimen Record and List Views lesson of this course.

At the end of the lesson, you will be able to navigate to and edit Specimen records and refer specimens.

Slide 11 - Specimen Records

Slide notes: Specimen records contain all the details associated with a specific specimen in SIS. After logging into the GDSP application, click Specimens from the Left Navigation menu to access the Specimens page.

Slide 12 - Specimens List Views

Slide notes: There are four Specimens list views. These list views can be toggled between to complete specific work goals. You will have read and edit access to the records within the PNS program for the four list views which are:

1. All - Specimens List View: This view displays all specimen records regardless of the specimen status. This view can be accessed by selecting All - Specimens from the dropdown icon next to the current view header.
2. CCC 40 - Specimens List View: This view displays all open specimen records that have been assigned to GDSP for further processing based on their associated adequacy codes. This view can be accessed by selecting CCC 40 - Specimens from the dropdown icon next to the current view header.

Slide 13 - Specimens List Views (Cont'd)

Slide notes:

3. Closed - Specimens List View: This view displays all specimen records that no longer require case management. This view can be accessed by selecting Closed - Specimens from the dropdown icon next to the current view header
4. Headline - Specimens List View: This view displays all headline specimen records that coordinators need to address. This view can be accessed by selecting Headline - Specimens from the dropdown icon next to the current view header.

Slide 14 - Tabs in a Specimen Record

Slide notes: Click the hyperlinked Accession Number of a Specimen record from the Specimens list view to navigate to a particular Specimen record. You can see four tabs in the Specimen record.

1. Summary tab: Displays the details of any Patient, Specimen, Result, or Authorized Services related to the specimen, Clinician, and Payor.
2. Pregnancy Information tab: Displays information about a Patient, Case, or Specimen's Interpretation Factors.

Slide 15 - Tabs in a Specimen Record (Cont'd)

Slide notes:

3. PNS Interpretation History tab: Displays a grid with all interpretation records for the specimen, with the latest one at the top. These fields are read-only and non-editable.
4. Related tab: Provides an option to view the Audit History of a specimen record as read-only fields or to view Specimen Results.

We will now learn about the edits and updates that you can make in the Summary and Pregnancy Information tabs.

Slide 16 – Edits and Updates in the Summary Tab

Slide notes: Your day-to-day activities may require you to edit or update the following information in the Summary tab of a Specimen record:

1. Update PDC Assignment
2. Create Specimen Record related tasks

Let us learn about each in detail.

Slide 17 - Updating a PDC Assignment

Slide notes: The following actions can be performed using the PDC field under the Specimen Details section of the Summary tab:

- Refer the specimen to a new PDC
- Reassign the specimen to a new PDC
- Remove the assigned PDC from the Specimen record

We will now learn about each in detail.

Slide 18 – Refer the Specimen to a new PDC: Walkthrough

Slide notes: When a specimen is referred from a CCC to a PDC, the specimen status changes from CCC Review to PDC Review. The PDC field will automatically be populated at the time the specimen is in CCC Review. Perform the following steps to refer a specimen to a new PDC:

1. Click the Magnifying Glass icon in the PDC field to get a quick list of Prenatal Diagnosis Centers that can be assigned to a Specimen record.
2. Select the required option.
3. Click the Save & Close button on the page ribbon at the top of the record to update the changes. You can also click the Save button if you want to stay on the same screen.

Slide 19 - Refer the Specimen to a new PDC: Walkthrough (Cont'd)

Slide notes: The Referral Date will be updated to the Current Date after a successful update and the specimen will be displayed in the new PDC's Referred Specimens List view. When a specimen is referred to a PDC center, the Patient and Case records of the specimen will be shared with the PDC.
The system will authorize the services for which the specimen is eligible.

Slide 20 - Reassign the Specimen to a new PDC: Walkthrough

Slide notes: You can reassign the case to a different PDC. Perform the following steps to reassign the PDC for a Specimen record:

1. Click the Magnifying Glass icon in the PDC field to get a quick list of Prenatal Diagnosis Centers that can be assigned to a Specimen record.
2. Select the required option.
3. Click the Save & Close button on the page ribbon at the top of the record to update the changes.

You can also click the Save button if you want to stay on the same screen. The previous PDC will be replaced with a new selection.

Slide 21 - Reassign the Specimen to a new PDC (Cont'd)

Slide notes: During reassignment, SIS will check if the current PDC has any appointments associated with the specimen. You can reassign the case if there are no scheduled appointments or if the appointment status is Cancelled/No Show.

Slide 22 - Reassign the Specimen to a new PDC: Scenarios

Slide notes: SIS will remove a specimen's association with the current PDC upon reassignment to a new PDC. This entails removing the specimen from the current PDC's All Referred Specimens list view and adding it to the new PDC once it is updated.
Let us learn about the scenarios that may occur during reassignment in detail.

Slide 23 - Scenario 1

Slide notes: If an appointment is in the Kept status, the specimen will continue to be displayed in the Referred Specimen list view of the original PDC.

Slide 24 - Scenario 2

Slide notes: If a service is in the Provided appointment service status, then the service will continue to be displayed with the original PDC.

Slide 25 - Scenario 3

Slide notes: If a service has been provided by the original PDC, the original PDC will continue to have access to the PSR and can submit with the services marked as Provided.

Slide 26 - Scenario 4

Slide notes: If a service is not provided, the service's authorization will be automatically removed at original PDC.

Slide 27 - Scenario 5

Slide notes: If no other case/specimen of the same patient is assigned to the original PDC, the patient's association with the original PDC will be removed. PDCs will lose access to all related records upon reassignment unless that appointment was kept at that PDC. They will only have access to the records related to the Kept appointment.

Slide 28 - Scenario 6

Slide notes: If any system generated task is assigned to the original PDC, it will be marked as Complete. Upon reassignment, the original PDC will be notified via a system-generated task that the specimen is no longer in their Referred – Specimen list view.

Slide 29 - Scenario 7

Slide notes: If any Special Authorization Requests are pending from the original PDC, the services on the request will be marked as Denied.

Slide 30 - Scenario 8

Slide notes: If an authorized service has not been provided by the original PDC, the system will authorize it at the new PDC upon referral.

Slide 31 - Scenario 9

Slide notes: If the referral has been canceled for a PDC, the PDC will not be allowed to create new appointments or update the existing ones. If there are no Kept appointments at the PDC site that's removed, the Task for the PDC will be the only record remaining of that patient for the staff associated with that PDC; they will no longer be able to access the specimen, case, or other records associated with the referral.

Slide 32 - Remove assigned PDC from Specimen Record

Slide notes: If you remove an existing PDC and do not select a new PDC, then the system will change the status from PDC Review to CCC Review and generate a task to the current PDC informing that the specimen referral is Cancelled. A task will also be generated at original PDC if not selected.

For example: If a pregnant individual is relocating in the state, remove the PDC until new address is confirmed and then assign PDC.

Slide 33 - Remove assigned PDC from Specimen Record

Slide notes: Perform the following steps to remove the assigned PDC from a Specimen record:

Hover over the currently assigned PDC site name in the PDC lookup field and click the **X** icon to remove it.

Click the **Save & Close** button on the page ribbon to update the changes. You can also click the **Save** button if you want to stay on the same screen.

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Slide 34 - Refer to PDC - Scenarios

Slide notes: The following scenarios may occur while removing the assigned PDC from the Case record:

- If you have two referable specimens, both cfDNA and MSAFP, then both specimens, must be referred to the same PDC.
- If the first specimen is referred to a particular PDC and the patient has not been provided all the services they opted for, then the second specimen must be referred to the same PDC as well.
- If you do not select the same PDC for the second specimen on the specimen record, then an error message will be displayed, stating: This patient already has a referral to PDC site code. Assign this specimen to the same site instead or change the referral site of the first specimen.

Slide 35 - Specimen Tasks

Slide notes: You may create tasks related to specific specimens from the Specimen record by following these steps:

1. From the Task grid of the Specimen record, click the New Task button.
2. The Quick Create: Task view will appear.
3. Fill out all required fields.
4. Click Save & Close button.
5. The task will now be viewable from the Task grid of the associated specimen as well as your Task list views.

Slide 36 – Review Pregnancy Information Tab

Slide notes: Pregnancy Information tab displays the details of any Patient, Specimen, Result, or Authorized Services related to the Specimen, Clinician, and Payor. This tab will allow you to review any interpretation or reinterpretation on this tab related to a specimen.

Slide 37 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
Which tab displays a grid with all interpretation records for a specimen?
Select the correct option.

Slide 38 - Lesson Objectives

Slide notes: Welcome to the Appointment Record and List Views lesson of this course.
At the end of the lesson, you will be able to navigate to and view appointment.

Slide 39 - Appointments List View

Slide notes: All - Appointments list view is the only appointment list view available for GDSP users and provides Filter, Refresh, and Export options.

- Filters allow you to change your view.
- Refresh ensures the most up-to-date information is being displayed.
- Export enables you to open and view this data in Microsoft Excel.

Slide 40 - Types of Appointment Statuses

Slide notes: You can view and update an appointment's status on the Appointment record. Appointments can have any of the following four statuses.

- Scheduled: The default status of an appointment is Scheduled when it is initially created.
- No Show: The status of an appointment can be changed from Scheduled to No Show if the scheduled appointment date and time has passed and the patient did not turn up.
- Cancelled: The status of an appointment can be changed from Scheduled to Cancelled if the scheduled appointment date and time has not passed and the patient has cancelled.
- Kept: The status of an appointment can be changed from Scheduled to Kept if the scheduled date and time has passed.

Slide 41 - Appointment Records

Slide notes: Perform the following steps to view an Appointment record:

1. Select the record from the list view.
2. You will land on the Appointment Record. Navigate through the record to see the fields you wish to view.
3. On this record, you can view the following details:
    - Appointment Details
    - The Associated Specimen
    - Authorized Services for that Appointment
    - Screening question - Has the patient been provided with all of the authorized services that the patient wanted?

Slide 42 - Types of Service Records

Slide notes: There are 15 types of service records viewable on an appointment. The service record types are filtered based on the GA range for the desired appointment date. The types of service records are listed below.

Slide 43 - View Authorized Services

Slide notes: You can only view the service records on an Appointment record for which the patient is authorized on the day of the appointment.

- All services that are authorized and whose authorization date window overlaps with the appointment date will show up on the Authorized Services grid on the Appointment record. This may include services that are approved when any special authorization requests are completed by GDSP.
- Approved services that are not specially authorized are system authorized services.

Slide 44 - View Authorized Services: Scenarios

Slide notes: Of the 15 service records, some may not be displayed on the Appointment record due to specific scenarios. These scenarios only pertain to Specially Authorized services and are mentioned below:

- CVSK is authorized along with CVS in the same Special Authorization Request record.
- AMK is authorized along with AM in the same Special Authorization Request record.
- MA is authorized along with AM or CVS in the same Special Authorization Request record.
- AF is authorized along with AM in the same Special Authorization Request record.
- PBK is authorized along with PB in the same Special Authorization Request record.

This Information is meant to describe SIS functionality and not meant to describe GDSP Policy for Special Authorizations.

Slide 45 - Update Appointment Status Scenarios

Slide notes: Changes may be required and are not made until you save edits made to the record. Here are some scenarios you may encounter while updating appointment statuses.

- Change of Status to Scheduled
- Specimen Reinterpretation - Scheduled Status
- Change of Status to Kept
- Change of Status from Kept
- PSR Linked to a Single Specimen
- PSR Linked to Multiple Specimens

Slide 46 - Change of Status to Scheduled

Slide notes: If you want to change the status of an appointment to Scheduled from any other status, ensure the appointment date and time are on or after the referral date while selecting the date and time.

If the selected appointment date and time are before the referral date, you will receive an error message while saving the record.

For multiple specimens to be on the same appointment, they must be on the same case with a referrable screening result and must have services that can be provided at the same time based on authorization windows. If two specimens exist on the same Appointment record, SIS considers the referral date of the first referred specimen for the error message.

Slide 47 - Specimen Reinterpretation – Scheduled Status

Slide notes: Any time a reinterpretation is run on a specimen, you can view the system-generated task. It might change the authorized services on the associated appointment in Scheduled status.

Any updates to the authorized services due to a specimen reinterpretation will only impact appointments in other statuses except for Kept. This will result in a new system-generated task.

When a reinterpretation occurs due to new information learned at the PDC via Genetic Counseling or PDC Ultrasound, it is still important to check and possibly update the patient's appointment service statuses if the new result may change what services remain authorized by GDSP policy.

Slide 48 - Change of Status to Kept

Slide notes: If you want to change the status of an appointment to Kept, ensure that all authorized appointment service statuses are marked as either Provided or Not Provided.

If authorized appointment service statuses are not marked, you will receive an error message while attempting to change the status before saving.

Slide 49 - Change of Status to Kept (Contd.)

Slide notes: When the status of an appointment is selected as Kept, a question card will appear on the Appointment record. Select either Yes or No to the question and click Save. If Yes, a PSR will automatically be created in Draft status if one does not already exist.

If the answer to all services being provided is Yes, the specimen status will be updated to PDC Review - Follow Up Completed for the associated PDC and specimen.

If a new specimen is referred after a PSR has been created and is in Draft status, in order to schedule an appointment for the newly referred specimen, select No as response to the question: Has the patient been provided with all the services they wish to opt for at this PDC? However, if the PSR is in Invoiced status, then create a new appointment without any changes to the existing Kept appointment. This will eventually lead to the creation of a second PSR.

Slide 50 - Change of Status from Kept

Slide notes: If you update the status of an appointment from Kept to Scheduled, Cancelled, or No Show, then the authorized appointment service statuses for that appointment are automatically updated to Not Provided.

Slide 51 - PSR Linked to Single Specimen

Slide notes: The following will occur in case when a PSR is linked to a specimen when changing from Kept:
If the PSR is linked to a specimen and the updated date and time of the appointment is after the PSR creation date and time, the PSR details will be cleared, and a case note will automatically be added regarding the deletion.
When the PSR details is cleared, SIS will also wipe out the service record details and unlink the specimen from the Appointment record with a new case note regarding the unlinking.
This happens only when:

- There is only one appointment for a specimen
- The appointment is marked Kept by error

The status of the appointment is changed from Kept after filling out the PSR details for the services in the appointment if PSR still exists or not.

Slide 52 - PSR Linked to Multiple Specimens

Slide notes: When changing the status from Kept to any other status for an appointment that is linked to only one specimen:
If there are multiple specimens on a PSR, SIS will unlink the related specimen from the PSR record and the specimen's status will be updated from PDC Follow Up Completed to PDC Review - Open.

Slide 53 - Appointment and Test Services Statuses

Slide notes: Any time an appointment is updated, the status of the services categorized as tests on a PSR must be the same: Provided or Not Provided. These services are:

- AMK, MA, and AF will have the same status as AM.
- CVSK will have the same status as CVS.

Slide 54 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.

What is the status of the appointment if the scheduled appointment date and time has passed, and the patient did not turn up?
Select the correct option.

Slide 55 - Lesson Objectives

Slide notes: Welcome to the Special Authorization Requests lesson of this course.
At the end of the lesson, you will be able to review Special Authorization Requests and complete specific tasks.

Slide 56 – GDSP Special Authorization Requests List View

Slide notes: Special Authorization Request list view filters requests based on certain pre-determined criteria. You can navigate to the list views by clicking on the Special Authorization link on the left navigation menu. The special authorization list views that you will be able to toggle between include:

- Completed - Special Authorization Requests: This is the default view and displays all completed special authorization requests from GDSP and all PDCs.
- Draft - Special Authorization Requests: This view displays all open special authorization requests.
- Submitted - Special Authorization Requests: This view displays all submitted special authorization requests from GDSP and all PDCs.

All three List Views display the Filter, Refresh, and Export options.

Slide 57 - Create a Special Auth Request

Slide notes: You can click the New Special Authorization Request button on the Specimen record's Special Authorization Requests sub-grid to navigate to a New Special Authorization Request record.
If the specimen is already closed and you click the New Special Authorization Request, an error message will be displayed, explaining that this action is not allowed for a closed specimen.

Slide 58 - Create a Special Auth Request

Slide notes:
Let us see how to create a Special Authorization Request in SIS 2.0.

1. Navigate to Special Authorization requests sub-grid in a Specimen Record and click the **New Special Authorization** button.
2. Fill out the **Requested By** field and click **Save** on the standard ribbon.
3. Please note, the **PDC Assignment** should automatically be populated by SIS if the specimen is currently referred to a PDC.
4. After saving, the Requested Services grid will appear on the Special Authorization Request record and the request will be in the Draft status. You must save the Special Authorization Request before you can add services to the Requested Services grid.
5. Click the **New Services** button on the Requested Services grid to access the Quick Create Services form.

6. You will be able to add any **Service Type** for Special Authorization approval if that service type has not already been added to that Special Authorization Request.
7. Enter and select the **Service Type** from the Service Type dropdown.
8. Click the **Save & Close** button on the form.
9. The service will appear on the Requested Services grid with a Pending authorization service status.
10. Click **Save & Close** on the page ribbon to navigate back to the Specimen record.
11. You will now be able to see the request in the Draft status on the Special Authorization Request sub-grid.
12. The PFAC staff will be able to edit the Authorization Service Status of all the services in the Requested Services grid from Pending to Approved or Denied by directly clicking the Pending word in the Record line of the Requested Services grid once the Special Authorization request is submitted and clicking the **Save** icon.
13. You can also approve by double clicking the row of the service on the sub-grid.
14. Once all services in the special authorization request have an authorization service status other than Pending, the request's status will directly change to Completed status when saved on the Requested Services grid.
15. The case timeline linked to the relevant specimen will show a new case note. You can add attachments and notes in the record's **Notes and Attachments** tab after submission.

Please note: The date the special auth request is in Completed status can be after the date of the specimen reaches the 24w0d GA mark.
Once all services are set to either approved or denied the status will automatically change to completed.
The authorization window for specially authorized services is from the date the request becomes Completed to the end of the pregnancy; there is no GA limit of 24w0d for specially authorized services.
Clicking the **Save** button on the ribbon bar will not save the changes made to the Requested Services Grid.

Slide 59 - Remove Special Authorization Requests: Walkthrough

Slide notes: You can delete an associated Service record on the Special Authorization Request record only if the Special Authorization Request record is in the Draft status.

1. Navigate to the Requested Services grid of the required Special Authorization Request.
2. Click the Checkbox button for the required request from the list.
3. Click the Delete Services button in the Authorized Services grid to delete the selected Special Authorization Request. Confirm the delete action in the pop-up to remove the services.

Slide 60 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
How do you create a new Special Authorization Request?
Select the correct option.

Slide 61 - Lesson Objectives

Slide notes: Welcome to the Patient Service Reports (PSRs) and List Views lesson of this course.
At the end of the lesson, you will be able to Review PSRs and complete specific tasks.

Slide 62 - Introduction to Patient Service Record (PSR)

Slide notes: A PSR is the principal record for information concerning a patient's services as administered by the PNS program. Some key features of PSRs are:

- PSRs are no longer manually created. In SIS 2.0, when an Appointment Status of an Appointment record is changed to Kept with a Yes to the last question, then a PSR will automatically be created in the Draft status.
- If the PDC user needs to enter any services on the PSR as provided but is unable to do so due to a lack of a provided appointment status for them after a PSR is created and it is not yet in Invoiced status, the services will need to be added to an appointment record, and the PSR will be updated. If a PSR is in the Submitted status and an additional appointment is Kept with additional services marked as Provided, the PSR goes back to the Draft status.
- SIS 2.0 supports multiple PSRs for a patient. If a PSR is invoiced, no edits or updates can be made. A new PSR would be created for the newly requested services.

Slide 63 - PSR List Views

Slide notes: List views are pages that display records in a list format. These views enable you to find, organize, and access records and provide options to Filter, Refresh, and Export. There are seven types of List Views available for PSRs:

- In GDSP Review - PSRs List View: This is the default view and displays all PSRs from any PDC in the status In GDSP Review needing your review to resolve inconsistencies or allow submission with those inconsistencies. These PSRs are editable by GDSP staff.
- All - Reverse Payment PSRs: This view displays all Reverse PSRs in any status, Draft, Submitted, or Invoiced.
- Draft - PSRs List View: This view displays all PSRs in Draft status and Pending Submission to GDSP for all the PDCs. These are still editable.

Slide 64 - PSR List Views

Slide notes:

- Draft - Reverse Payment PSRs: This view displays Reverse PSRs in draft status.
- Invoiced - PSRs - All List View: This view displays all PSRs from all PDCs that have been invoiced. This view is no longer editable.
- Invoiced - PSRs - Last 90 Days List View: This view displays all PSRs from all PDCs that have been invoiced in the last 90 days. This view is no longer editable.
- Submitted - PSRs List View: This view displays all PSRs for all PDCs that are in the Submitted status. These PSR records are editable by GDSP users until they move to the Invoiced status.

Slide 65 - Navigating to PSR List Views: Walkthrough

Slide notes: Perform the following steps to view a PSR record:

1. Select PSRs from the Left Navigation menu. You will land on the In GDSP Review - PSRs as a default List View.
2. Click the down arrow next to the List View title.
3. Select Draft - PSRs from the dropdown to view the specific list view.
4. Click the PSR ID to view that PSR.
   You may also enter the PSR ID in the Global Search field and click the PSR ID Record result. When you click a PSR ID it will navigate you to the PSR.

Slide 66 - PSR Record – PSR Details Tab

Slide notes: When you select a PSR ID, you will land on the PSR's Details tab. A PSR has the following items to view:

- PSR Details
- Patient Details
- Specimen
- Services
- Pregnancy Status by Fetus
- Subsequent Information Acquired after Initial PDC Visit (by fetus)

- Hard or Soft Inconsistencies, only if present

Slide 67 - PSR Record – PSR Details Tab

Slide notes: You can verify service records from the PSR. Each PSR could have up to all 15 of the unique service records available in the Authorized Services sub-grid and could have a service record for a given type of service more than once. Repeat services will have different Service Record ID numbers.

- Click the Service ID to navigate to the respective service record to review.

You will have the ability to edit service records in any status other than Invoiced. If already in Submitted status, you can revert the status back to Draft to make any necessary edits before submitting again.

Slide 68 - View PSR Status

Slide notes: Here are the different PSR Statuses as per the submission.

1. A PSR in the Submitted status will be displayed in both GDSP's and the respective PDC's Submitted - PSRs List View.
2. The PSR status will go from Draft to Submitted when a PFAC user clicks the Submit button.
3. This PSR will display in GDSP's In GDSP Review - PSRs list view.
4. GDSP inconsistencies will be visible only to GDSP users when PDCs submit with GDSP-only Inconsistencies. These PSRs can be found in the In GDSP Review - PSRs list view.

Some fields will only be visible once certain pre-requisite fields have been changed and saved.

Slide 69 - Submit a Service - Demo

Slide notes: Let us see how to submit a PSR.

1. Click the required PSR from the PSR ID field.
2. You will be navigated to the respective PSR record. Review the PSR for accuracy.
3. If necessary, select the unlocked, required field(s) to edit on the PSR record or service records.
4. Click Save to save the updates.
5. Review any PSR inconsistencies that will appear, hard, soft and GDSP only.
6. Click the Submit button on top of the record to submit the PSR.
7. A warning message will be displayed asking for permission to submit a PSR with soft inconsistencies. Click Yes to submit the PSR or select No to correct the information on the PSR.
8. Upon submission, the PSR status will change from Draft to Submitted.

Slide 70 - Updates and Resubmission - Demo
Slide notes: PSRs are accessible from the In GDSP Review - PSR List View. This will allow you to resolve the inconsistencies on the PSR record or Service record by updating the appropriate data on the respective records. You can also submit the PSR without resolving the soft inconsistencies. Let us see how to update and resubmit a PSR.

1. From the In GDSP Review PSR List View, click the desired **PSR ID** from the PSR ID field.
2. You will be navigated to the PSR record.
3. Click the **Submit** button on PSR record.
4. A warning message will be displayed asking for permission to submit PSR with inconsistencies.
5. Click **Yes** to successfully submit the PSR. This will change the PSR status from In GDSP Review to Submitted.
6. You will only see Draft, Submitted, and In GDSP Review options under the PSR Status field on the PSR.
7. You can change the PSR status from In GDSP Review to Submitted even if the inconsistencies, soft or hard, were not resolved.
8. Click **Save** to save any changes made to the PSR Status or PSR record.
9. The PSR and Service records will be editable only by GDSP users until the PSR record is in the Invoiced status.
10. You can update the PSR status on the PSR record from In GDSP Review to Draft. This will allow PDC users to make edits on PSR record.
11. If a PSR status is updated to Draft and the record is saved, then the PSR record will be assigned back to the respective PDC. It will display again on the PDCs Draft PSRs List View and they will be notified with a task.
12. If the status of PSR was changed to Draft or Submitted without resolving any soft or hard inconsistencies, then these will remain visible on the PSR record. GDSP inconsistencies will only be visible to GDSP users.

Slide 71 - Deleting a PSR

Slide notes: You will be able to delete any PSR in Draft Status from the Patient Service Reports grid on the Case record by clicking the Delete button on the grid. Only GDSP users will have this button visible and clickable.

In the situation where an appointment linked to a PSR in Draft status is changing from Kept to Scheduled, No Show, or Cancelled, SIS will auto create a task assigned to PFACs Follow up Staff members to delete the hanging PSR.

When you click the Delete button on the Case record’s PSRs grid, it will trigger a task to the PDC signaling that a PSR in their workload was deleted. The PDC can access this from the relevant Case’s Timeline tab.

You will be able to add free text information in the Subject field of the Task record to further inform PDC users that were working on the Draft PSR about the deletion.

Slide 72 - Reverse Payment PSRs List View

Slide notes: Payment for services where overpayment has occurred will need to be reversed with the creation of a Reverse PSR. From the PSR Left Navigation Menu, you can view the following Reverse Payments List Views:

All - Reverse Payment PSRs: This view displays all reverse payment PSRs entered into SIS that are either in the Draft status, have been submitted for invoicing or have been invoiced.
Draft - Reverse Payment PSRs: This view displays all draft reverse payment PSRs that have been entered into SIS.

Slide 73 - Reverse Payment PSRs List View
Slide notes: You can identify services that were overpaid from an invoiced PSR. Once you have identified services or tests that were overpaid to the PDC, they can be marked for reimbursement back to the PNS program from the PDC. Let us see how to process reverse payments.

1. Click **PSRs** from the Left Navigation menu.
2. Click the **down arrow** next to the Submitted - PSRs list view to view all available list views.
3. Select **Invoiced - PSRs - All** list view from the dropdown to navigate to it.
4. Click the hyperlinked **PSR ID** of the required invoiced PSR to view it.
5. Click the **Process Overpayment button** on the ribbon. The button will only be visible if the PSR record does not have the overpayment flag.
6. An identical copy of the PSR with a new PSR ID will be created which will have details of the associated specimens, case, and patient, as well as the services and tests that are in Provided status.
7. The Reverse PSR will include checkboxes in the Authorized Services To Be Reversed grid next to each service.
8. Scroll down to the Authorized Services To Be Reversed grid.
9. You can remove the correctly provided services by clicking on the **checkboxes** next to the Service ID in the Authorized Services To Be Reversed grid to unmark them from the Authorized Services grid on the new PSR record.
10. Only services with checkboxes marked will be reversed.
11. Click the required **checkbox** to select a service for removal.
12. Once the changes have been made, click the **Submit** button to update the PSR status to Submitted and to view in the All - Reverse Payment list view.
13. SIS will not perform any inconsistency check if the overpayment flag is set to yes.
14. Please note: if you try to submit the PSR by clicking the **Submit** button without any services included for reversal, you will receive an error message.
15. Once the Reverse PSR is updated to the Submitted status, the services in the Authorized Services grid will have been reversed.
16. The following updates occur when reverse payments are submitted.
17. A Reprocess Payment button will be available on the Invoiced PSR's ribbon bar. Click the **Reprocess Payment** button to create a new PSR with a new PSR ID.
18. All services that are present on the original PSR will be copied and linked to the new PSR.
19. At this time, you can make updates to each service on the new PSR, as needed. The audit log on the related tab will capture the date, time, record, and user who made the reverse payment changes.
20. SIS will remove the overpayment tag from the services on the selected PSR. SIS will perform inconsistency checks for the reverse PSR when it is updated to Submitted status.

Slide 74 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.
When is a PSR created?
Select the correct option.

Slide 75 - Lesson Objectives

Slide notes: Welcome to the Invoicing Workflow lesson of this course.
At the end of the lesson, you will be able to locate and view invoices.

Slide 76 - Introduction to Invoicing

Slide notes: Invoicing occurs between GDSP and PDCs.

- PSRs that are placed in the Submitted status by GDSP will be available for invoicing.
- Billing occurs monthly on the last calendar date of the month, even on holidays.
- All PSRs, including Reverse Payment PSRs, in the Submitted status at the end of the month will be processed by the system and updated to Invoiced status.

Slide 77 - All Invoices (Last 36 Months) List View

Slide notes: The Invoices page can be accessed from the Left Navigation menu. The All Invoices (Last 36 Months) List View is the only invoice list view and displays all invoices created in the previous 36 months in descending order by the invoice date.

- You can tailor the view of your columns by adjusting the data using any of the three features to sort, filter, or export the columns based on the action you need to perform. The default arrangement of the columns is shown on the screen.

Slide 78 - All Invoices (Last 36 Months) List Views (Cont'd)

Slide notes:

- Invoice # - the unique number assigned to the invoice when generated
- System Generated Invoice Date - the date of generation in descending order by default
- PDC Site - the site where the services were administered
- Date PDC Created Invoice PDF - the first date the invoice was downloaded for printing

Slide 79 - All Invoices (Last 36 Months) List Views (Cont'd)

Slide notes:

- Date PDC Submitted Invoice
- Voucher #
- Voucher Issued Date - the date the voucher was applied
- Warrant # - the number of the check issued to reconcile the invoice
- Warrant Issued Date - the date of check issue

Slide 80 - Invoice Record

Slide notes: An invoice record can be viewed by clicking the desired Invoice Number that is hyperlinked from the Invoice# column on the Invoice list view. An Invoice record has the following sections:

- Invoice Details: This section details the selected invoice and displays the creation and submission dates, the warrant and voucher numbers, and the warrant and voucher issue dates of the invoice.
- PDC Invoiced PSRs: This section displays the PSRs and all services invoiced by the PDC. An Admin Fee will automatically be added per Comprehensive PDC per Case if there is at least one service which has been provided to the patient.
- Notes: This section allows you to enter specific notes related to the invoice and includes a timeline to view previous actions related to it.

Slide 81 - Invoice Record (Cont'd)

Slide notes: The following fields are automatically populated by SIS and are locked in the record:

- PDC Site
- System Generated Invoice Date
- Date PDC Created Invoice PDF
- Voucher #

Slide 82 - Invoice Record (Cont'd)

Slide notes:

- Voucher Issue Date
- Warrant #
- Warrant Issue Date

Locked fields are denoted by the Lock icon next to the field.

Slide 83 - Update PDC Submission Date

Slide notes: You can update the Date PDC Submitted Invoice field to the appropriate date following these conditions:

- The date cannot be entered until the Date PDC Created Invoice PDF has a date and should be after the Date PDC Created Invoice PDF.
- This date must be entered before GDSP users can enter the Date GDSP Submitted Invoice.

Slide 84 - Update PDC Submission Date: Walkthrough

Slide notes: If a PDC needs to resubmit an invoice, follow the given steps to update the PDC submission date for that invoice:

1. Navigate to the Invoice Details section of the invoice record.
2. Click the Calendar icon on the Date PDC Submitted Invoice field.
3. Select the updated date and click the Save & Close button from the ribbon.

Slide 85 - Update GDSP Submission Date

Slide notes: The Date GDSP Submitted Invoice field contains the date, an invoice was signed and sent to the Accounting Department to process reimbursement. An Invoice Liaison can also update the Date GDSP Submitted Invoice field for an invoice to the appropriate date, subject to the following conditions:

- The updated date must be after the dates mentioned in the Date PDC Submitted Invoice and Date PDC Created Invoice PDF fields.
- This field will be updated after the GDSP Invoice Liaison has entered a date and saved the invoice record.

An error message will be displayed after the Save & Close button is clicked and the date precedes the Date PDC Submitted Invoice and Date PDC Created Invoice PDF.

Slide 86 - Update GDSP Submission Date (Cont'd)

Slide notes: Follow the given steps to update the GDSP submission date for an invoice:

1. Navigate to the Invoice Details section of the invoice record.
2. Click the Calendar icon on the Date GDSP Submitted Invoice field.
3. Select the updated date and click the Save & Close button from the ribbon.

Slide 87 - Download and View PDF Invoice in SIS: Walkthrough

Slide notes: PDC users will need to download and view invoices as a PDF document. Viewable on an invoice is the following information: PDC details, payment information, remittance details, services billed and admin fee if applicable, and authorization signature fields.

Slide 88 - Download and View PDF Invoice in SIS: Walkthrough

Slide notes: Follow the below steps to generate a PDF:

1. Navigate to the required invoice's record.
2. Click the Create Invoice PDF button on the ribbon of the Invoice Summary screen. At this time, the following will occur:
    - The Invoice PDF will be attached to the Timeline in the Notes section.
    - SIS will take the current date and fill the Date PDC Created Invoice PDF only on the first use of this button, if created by a PDC user.
    - An Audit History under the Related tab will capture the user and time when you clicked the Create Invoice PDF button, if this was the first time you clicked it.

Slide 89 - Download and View PDF Invoice in SIS: Walkthrough (Cont'd)

Slide notes:

3. Navigate to the Notes section to view the Timeline.
4. Click the document name to download the attachment, which is the PDF of the Invoice Generated, from the Timeline to view and print as needed.

Slide 90 - Addendum Invoices

Slide notes: In rare cases, you will work with addendum invoices, which are invoices that have services provided on a PSR in a previous fiscal year. To view addendum invoices on the Invoice Summary screen, first navigate to the required PSR record.

- If a PSR is in Submitted status and the services on the PSR have Service Provided Dates in two different fiscal years, then SIS will create two separate invoices for each fiscal year for that PDC for that PSR.
- The services that were provided in the prior fiscal year should appear on one invoice, which is the addendum invoice. The invoice number should be incremental after 12.
- For example, if the invoice was the first such invoice generated, then the invoice record number will be: ##-####-13. If it was the second such invoice generated, then the invoice record number will be: ##-####14 and so on.
- The services that were provided in the new fiscal year will appear on a second invoice. The invoice number sequence and the last two digits of the invoice record number should be aligned with the month that it was generated in for that PDC.

Slide 91 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.

Invoices can be created by:

Complete the sentence by selecting a correct option.

Slide 92 – Course Summary

Slide notes: Let's summarize. Here are the key takeaways of the course.

Slide 93 – Thank You

Slide notes: You have completed this course.

Press Exit button to leave the course.