



# Sandata

Get more right from the start

Order Manager  
Application Training

Week of August 16, 2021



# Agenda



## TOPICS FOR REVIEW

- **WHY/WHAT IS ORDER MANAGER**
- **ORDER MANAGER BENEFITS TO PROVIDERS**
- **ORDER MANAGER PROVIDER FEATURES**
- **ORDER LIFE CYCLE**
- **GETTING STARTED**
- **PRODUCT DEMO**
- **BUSINESS SCENARIOS**

# Why Order Manager

- BlueCross BlueShield of TN is looking to improve today's member referral process to increase efficiency and gains for you, the provider network. At the same time, they want to address the growing need, for our provider network, to have real-time, secure communication with them.
- BlueCross BlueShield of TN partnered with Sandata to provide a seamless, easy to use application to minimize manual burden, reduce inefficient processes, compliance risk and data issues.
- Sandata Order Manager, a web-based Health Insurance Portability and Accountability Act (HIPAA)-compliant application, helps the distribution of member referrals, referred to as orders, for improved home care service delivery.

Automate and expedite the distribution of your member referrals for “*faster care, right from the start*”.



# Providers Never Miss a member referral with Order Manager

## *Communication*

- Faster, Bi-Directional Collaboration on Care
- Embedded Documents

## *Speed*

- Increased Case Visibility (Including Expiring Auths)
- Detail for Better Decisions

## *Single Source*

- 3 Easy Steps to Accept
- Single Portal for Member Assignments

**Electronic Member Referral Distribution:** Electronically receive member referrals via Order Manager web portal

**Real-Time Secure messaging:** Faster bi-directional secure messaging in real-time between Providers and BlueCross BlueShield of TN.

This electronic automation process improves member referral process and provides efficiency gains for you, the provider agency.

# Order Manager Benefits for the providers

- **Increased referral and data accuracy for member and auth details.** No more miscommunication from phone calls, or loss of paper via faxes.
- **Detail for Better Decisions.** Have all the details in one screen to determine whether this referral is a true match for your agency. Communicate prior to accepting the member referral to ensure you have all the necessary information to make your decision.
- **3 easy steps to Accept/Decline a referral.** Replace the manual process and reduce the time to accept/decline, with three easy steps. There is a bidding time of two (2) hours that is defined. When you receive member referrals via the portal, you have two hour to accept or decline. Working hours are defined as 7am (central) – 4pm (central). Any orders released by outside of these hours will be held till the next morning.
- **Not logged into the Portal.** No problem. System can be setup to get email alerts on member referral offers.
- **Need an updated Authorization.** View authorizations expiring in two weeks on the dashboard and securely message BlueCross BlueShield of TN to obtain the updated auth electronically
- **Secure Attachments.** Receive relevant documents electronically

# Order Manager Product Features –PROVIDER

## *Member Referral Offers*

- Review auth details and pertinent member data prior to case acceptance
- Accept or Decline cases
- Enter decline reason code on case declines
- Email alerts on new case offers

## *HIPAA Secure Messaging*

- Secure bi-directional messaging feature to communicate with the payers on care coordination
- Message securely on inquiries prior to accepting the case
- Safeguard PHI by attaching any documents for the payer

## *Expiring Orders*

- Visibility of all member orders that are expiring in two weeks on the Home page.

## *Providers Never Miss a Case*

- 3 Easy Steps to Accept
- Email Alerts on Case Offers

# Orders Life Cycle

Orders within Order Manager have statuses. It is important to understand the various statuses that live within an order lifecycle.

- **Offered:** A member referral that has been offered by the MCO.
- **Accepted :** Once a provider user accepts the Order, the order status automatically changes to 'Accepted'.
- **Active:** Once an order has reached the service start date, the order status automatically changes to 'Active'.
- **Completed:** An order that has reached the service end date, the order status automatically changes to 'Completed'. Certain PHI data will be masked due to HIPPA.
- **Cancelled:** An order that has been voided by BCBST specialist

All orders have a status



# Getting Started

For each provider agency, accounts are automatically created with a valid email that is on our records.

[If you wish to change the email on record, please advise your provider relations team as soon as possible. This email user is considered to be an “Admin” at your agency. To change email BCBST at ChoicesProviderRelations@bcbst.com](#)

- Prior to Go-Live, this “Admin” user will receive an automatic email to setup up a password that will allow access to Order Manager.
- Once logged into Order Manager, this “Admin” user will setup all users for their provider agency. (Training on “setting up users” will be provided)

Welcome!

We're excited to have you get started. First, you need to confirm your account. Just press the button below.

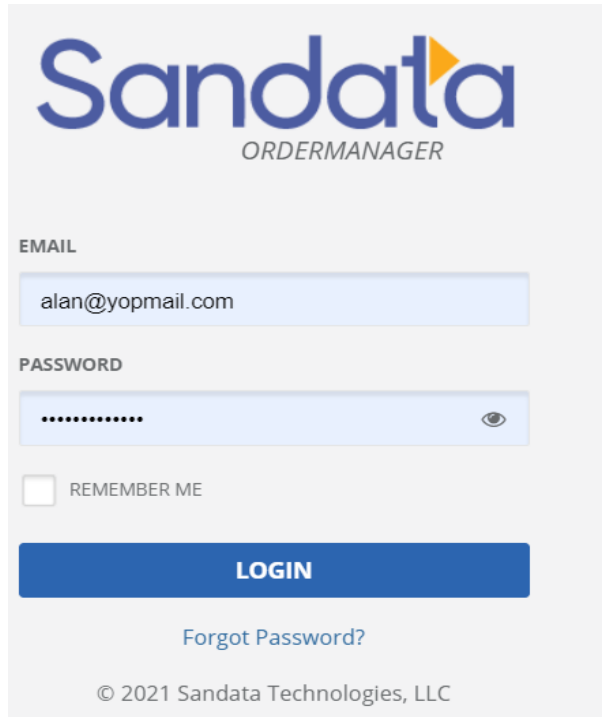
Confirm Account

Once all users are setup, each user will receive an automatic email to setup their password that will allow access to Order Manager

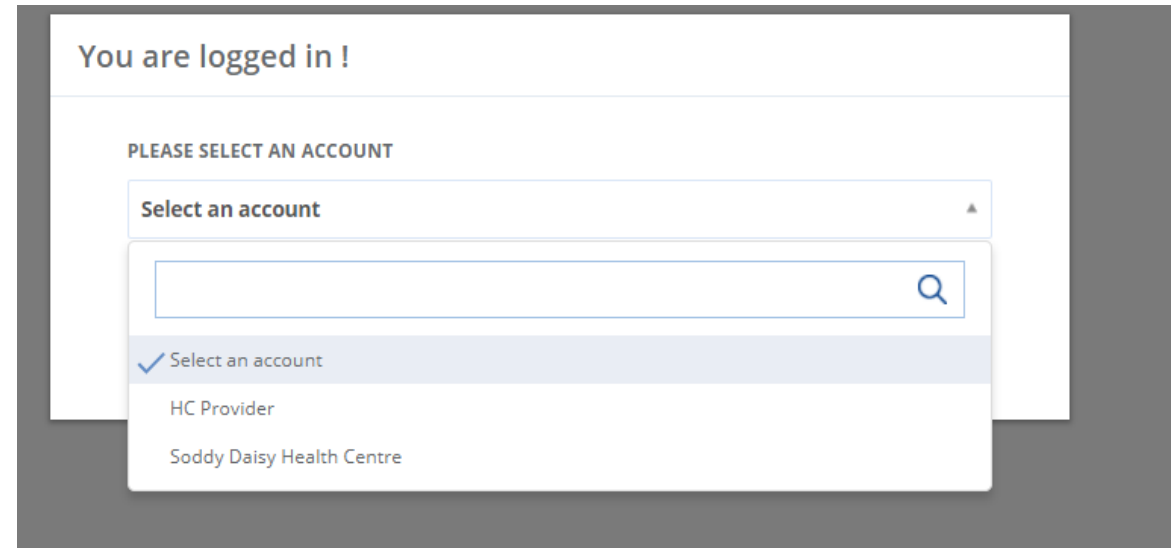
The Welcome email will come from [DoNotreply@sandata.com](mailto:DoNotreply@sandata.com). Please check your spam folder if you do not receive in your inbox.

# Logging into Order Manager

Once you have setup your password, you will be able to log into the application. Any user that has access to more than one provider agency account, a drop-down of their provider agency names will appear. From the drop-down, choose the appropriate agency name.



The login form for Sandata ORDERMANAGER. It features the Sandata logo at the top. Below it, there are input fields for EMAIL (containing 'alan@yopmail.com') and PASSWORD (masked with dots). A 'REMEMBER ME' checkbox is located below the password field. A blue 'LOGIN' button is at the bottom of the form. Below the button, there is a link for 'Forgot Password?' and a copyright notice '© 2021 Sandata Technologies, LLC'.



A screenshot of the account selection interface. It shows a message 'You are logged in !' at the top. Below it, a section titled 'PLEASE SELECT AN ACCOUNT' contains a dropdown menu. The dropdown is open, showing a search bar and a list of options: 'Select an account' (checked), 'HC Provider', and 'Soddy Daisy Health Centre'.

All users access Order Manager with their email ids

# How to Accept/Decline Orders

Member referral offers can be viewed from the Home page under 'New offers' or in the Orders module.

- **Viewing a member referral Offer from the Orders module:**
  - Filter by new offers.
  - Click on the offered order.
    - ✚ Due to HIPAA, certain information is masked. If the MCO has an attachment for review, the attachment icon is highlighted in red.
  - Click on the red attachment icon, to open the attachment and review.
    - ✚ Click on the Accept button to accept the order or Decline button to decline the order.
  - Before deciding, make any additional inquiries needed regarding the member referral order by clicking on the 'Create Message' button. The create message button is used to correspond with the MCO on an inquiry prior to accepting or declining the order.

**Always manage the dashboard and always accept or decline an order. NEVER NOT RESPOND to offers**

# Order Response Report

Under Reports, you can run an Order Response report that tells you how many orders were offered, how many your staff accepted, declined and had no response to.

**HC Provider**

**Order Response**

Order Released Date

07/14/2021 - 08/13/2021

County

Enter County

Payer Name

All selected

City

Enter City

1 of 1

100%

Find | Next

PAYER NAME	ACCEPTED	DECLINED	NO RESPONSE	ACCEPTED BY OTHER PROVIDER	TOTAL ORDERS OFFERED
Payer02	5	2	9	0	16

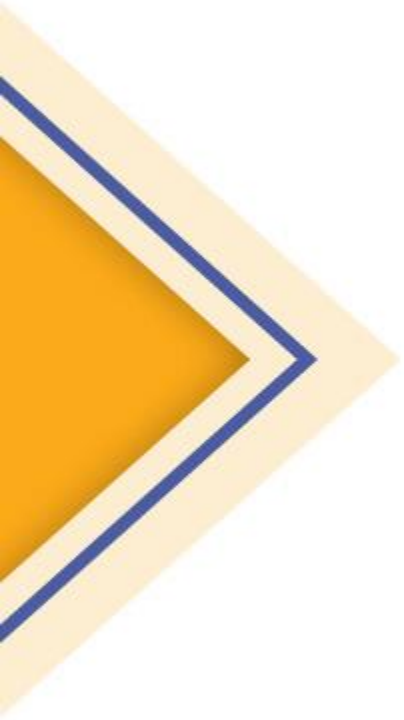
Order Response Report in Reports Module



# Order Manager Product Demo



# Business Scenarios



# New Member Process – Provider wishes to start services on a different date

- Click on the Orders Module
- Filter by New offers
- Click on the offer
- Review the details of the member referral
- Please note: When reviewing the order details, always pay close attention to the Special Instructions for any relevant information.
- **DO NOT ACCEPT THE MEMBER REFERRAL**
- Click Create message to send an inquiry to the BlueCross BlueShield of TN specialist that you wish to start on another date. Please be sure to specify the new date.
- If the BCBST user replies as an acceptance of the new date, wait for the date to be changed and then accept the order.
- If there is an attachment, the clip icon will be in highlighted. You must open the attachment, review and download before you accept the member referral.
- If the BCBST specialist r replies as not accepting the new date, then decline the order to give other providers a chance to accept the member referral.

**BlueCross BlueShield Bidding Time will be two (2) hours**

# Existing member – permanent service change



- The BCBST user will term the original auth, with an end date.
- For the term auth, Order Manager will receive the original auth with the end date and end the order. If the end date has reached, the order status will change from “Active” to “Completed”. If the end date has not reached, the order will remain in an “Active” status until the end date has reached.
- When you receive the new permanent service change order, you will see the Member name in the **Special Instructions**
- **Please note: When reviewing the order details, always pay close attention to the Special Instructions for any relevant information.**
- If there is an attachment, the clip icon will be in highlighted. You must open the attachment, review and download before you accept the member.
- Click the Accept button to accept this permanent service change order.

**BlueCross BlueShield Bidding Time will be two (2) hour**



# Existing member – One time schedule change/short term increase



- When you receive the one-time schedule change/short term increase order, you will see the Member name in the **Special Instructions**
- Please note: When reviewing the order details, always pay close attention to the Special Instructions for any relevant information.
- If there is an attachment, the clip icon will be highlighted. You must open the attachment, review and download before you accept the member referral.
- Click the Accept button to accept this one-time schedule change/short term increase order.
- Note: The original auth will remain active.

BlueCross BlueShield Bidding Time will be two (2) hour



# Services on hold

- You will receive an Order Manager message in your Messages module, advising you if services are on hold.
- If you receive this message, please hold services.
- Once services resume, you will receive a message back that the services are back on with a specified date.

**BlueCross BlueShield Bidding Time will be two (2) hours**



# Retro auths

- There will may be times when you will receive a retro auth order.
- For Retro orders, you will see in red “Retro” next to the auth detail title.
- In the **Special Instructions**, you will see the member’s name.
- **Please note: When reviewing the order details, always pay close attention to the Special Instructions for any relevant information.**
- **If** the start date is in the past and the end date is in the future, post your acceptance of the order, the system will automatically change the order status from “offered” to “Active”.
- If both start and end date are in the past, post your acceptance of the order, the system will automatically change the order status from “Offered” to “Completed”. For a “Completed” status the system will mask PHI information.

**BlueCross BlueShield Bidding Time will be two (2) hours**

# Void Auths

- There may be times when you have accepted a case (and the service has not started) that BCBST specialist, might need to void that order.
- If BCBST specialist voids an order, that order's status will change from "Accepted" to "Cancelled".

**BlueCross BlueShield Bidding Time will be two (2) hours**



# Term Auth

- When BCBST user terms an auth, you will see the end date for that order change to that termed date.
- You can also in Orders add a column of End date and look for Orders that will be termed a date

**BlueCross BlueShield Bidding Time will be two (2) hours**



# Need Help?

For support, you can email Sandata at [Tncustomercare@sandata.com](mailto:Tncustomercare@sandata.com)

or

BlueCross BlueShield of TN at 800 468 9736 ext 1296

Once logged into Order Manager, you can use the help to ask a question which will generate a ticket at Sandata.

