



Sandata

Get more right from the start

Order Manager
"Admin" Training

Week of August 16, 2021



Agenda



TOPICS FOR REVIEW

- **WHY/WHAT IS ORDER MANAGER**
- **ORDER MANAGER BENEFITS TO PROVIDERS**
- **ORDER MANAGER PROVIDER FEATURES**
- **GETTING STARTED**
- **CREATING OTHER USER ACCOUNT SETUPS**
- **Q&A**

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) hour that is defined. When you receive member referrals via the portal, you have two hour(s) 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

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.

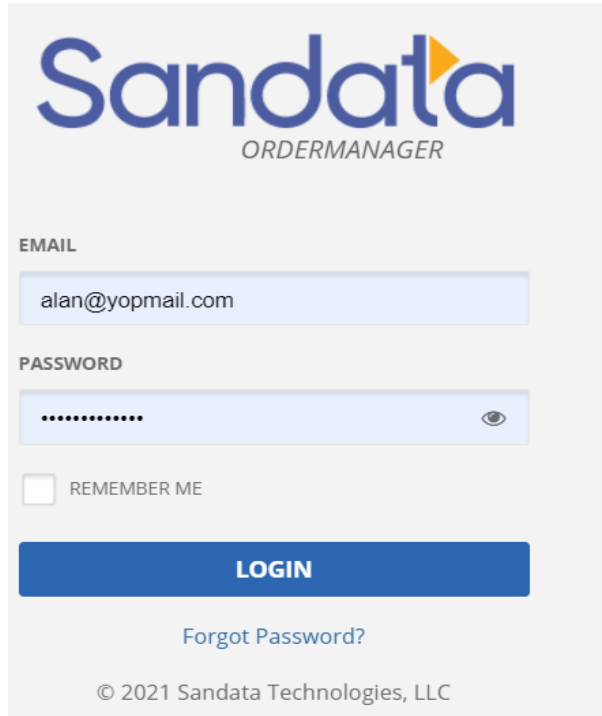
Confirm Account

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

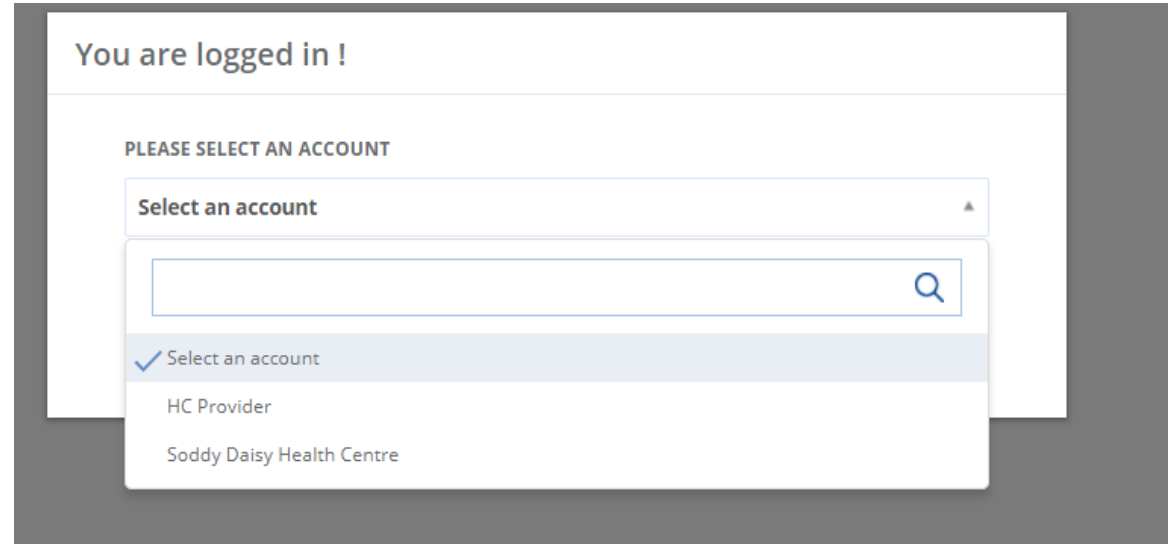
The Welcome email will come from DoNotreply@sandata.com. Please check your spam folder if you do not receive in your inbox.

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 'Forgot Password?' link and a copyright notice: '© 2021 Sandata Technologies, LLC'.



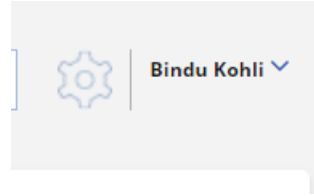
A screenshot of the account selection interface. At the top, it says 'You are logged in !'. Below this, a section titled 'PLEASE SELECT AN ACCOUNT' contains a dropdown menu. The dropdown is open, showing a search bar with a magnifying glass icon. Below the search bar, there are three options: 'Select an account' (which is selected and has a checkmark), 'HC Provider', and 'Soddy Daisy Health Centre'.

All users access Order Manager with their email ids

Setting up User accounts

1. In order to setup user accounts, you first need to setup roles with applicable permissions, as well as teams (If you are not segregating you members by teams, you can keep “default team”. Please note, a role and team is needed to setup user accounts. Follow the steps below to create user accounts.

1. Click on the setting icon.



2. Click on “Roles and Teams” under User Settings.
3. Click “Create Role” to add roles with permissions. At the pop screen, enter a Role Name, description and click save.

Add Role ✕

Role Name *

Role Description

Save

To setup users, you must setup Roles



Setting up User accounts (Cont'd)

4. Once you have added all your roles, click on a role to apply permissions applicable to that role.

Admin

Role Description

☒ Order

☒ View (Order and Care Plan) ☒ Accept/Decline Order

☒ Message

☒ View ☒ Create ☒ Edit Message ☒ Ack a message ☒ Email

☒ Reports

All selected

☒ Admin functions

☒ User Settings

☒ Add New Users ☒ Inactive Active Users ☒ Edit User profile ☒ Reset Password and unlock accounts

☒ Roles and Teams set up

☒ Configuration Settings

☒ Support Settings

5.

Roles have allowable permissions defined

Setting up User accounts (Cont'd)

5. For team, you do not need to add any teams. Use the “Default Team” to assign a team to your users (see next slide)

Use “Default Team” when assigning a team to your users.



Setting up User accounts (Cont'd)

6. You are now ready to create user accounts. Click on Users from the User Setting menu.
- Click “Add User’ button and enter the information for that user. Fields marked with a red asterisk(*) is required.

Create User

First Name *

Employee Id

Organization Name *

Handi Access Inc

Last Name *

Title

Role *

Email *

Department

The Role Name field is required.

Cell Phone

Expire Date

MM/DD/YYYY

Team Access *

All selected

Work Phone

Ext

Account Status

Active

Care Coordinator

All selected

Receive Broadcast Messages

Notes

1000/1000

To setup a user, you must define the role and a team. For teams, use the “Default Team”

Need Help?

For support, you can email Sandata at 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.

