Magellan Healthcare of Idaho

Outcomes and Assessments System – Adding a member to your caseload

Overview

In Magellan's outcomes and assessments system (accessed via Availity Essentials), providers must locate the member and add them to their caseload to begin adding assessments. This may include obtaining consent to view the member's historical assessment data within the system. This step-by-step guide demonstrates how access a member's profile to submit new assessments (without historical information). This guide also shows how to complete a Consent Form that will grant access to historical information from assessments previously completed within the member's profile.

Providers use the outcomes and assessments system when assessment data must be submitted as part of their services to a member. Providers do *not* need to access the member's profile in the outcomes and assessments system if the service does not require completion of assessments.

Prior to searching within the outcomes and assessments system, check Availity to confirm the member is eligible for services. If the member is not found in Availity, the provider should instruct or assist the member to call Magellan Member Servies for an eligibility screening. Magellan Member Services staff are available 24 hours a day, 7 days a week at 1-855-202-0973 (TTY 711).

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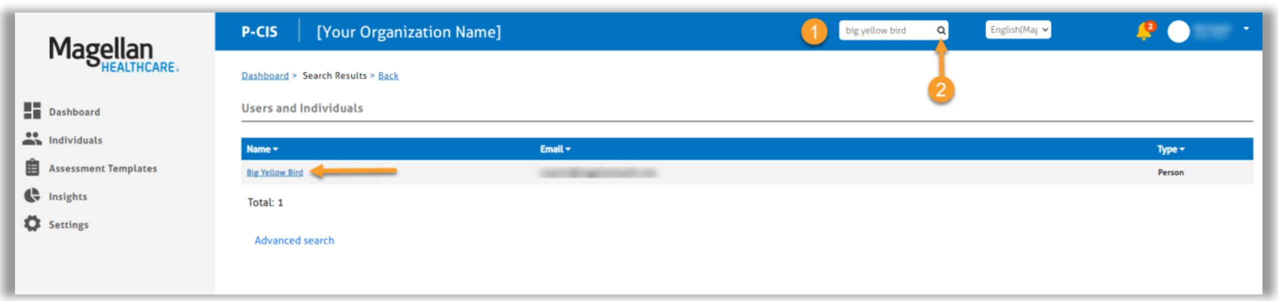
Locating the member in the outcomes and assessments system

After verifying eligibility, you will need to locate the member in the outcomes and assessments system.

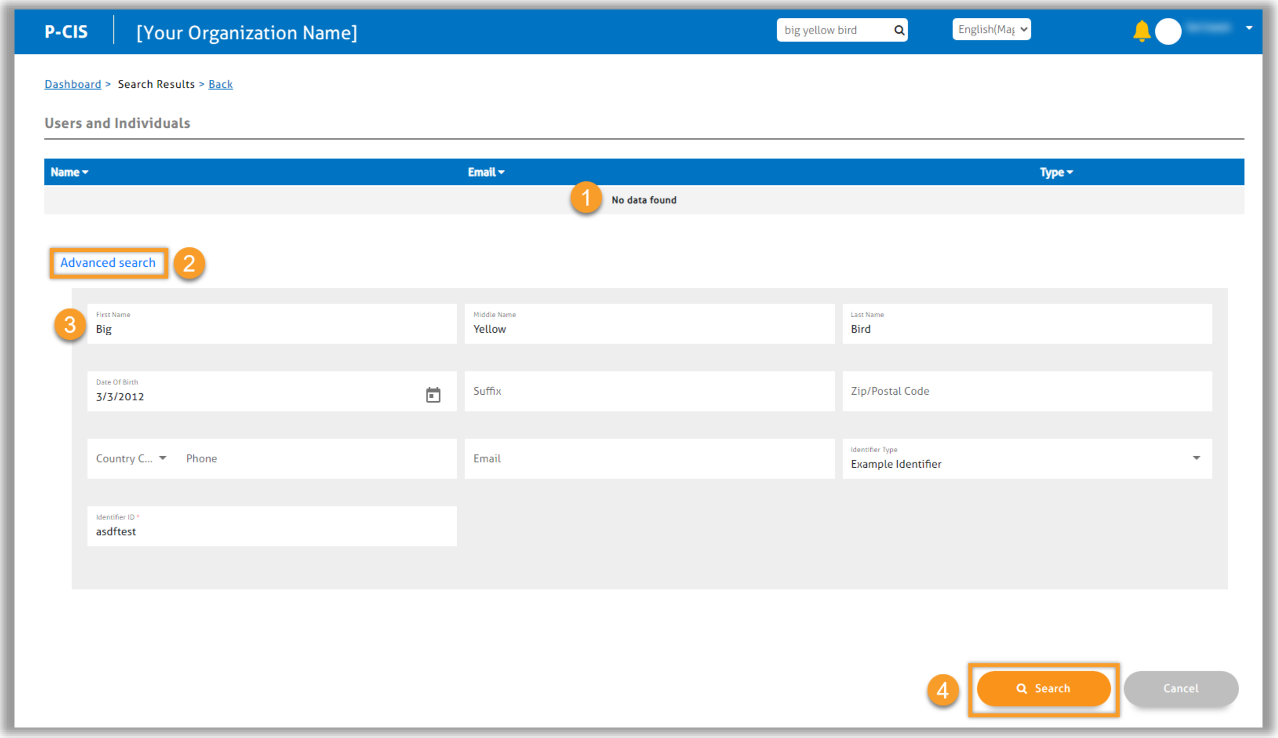
Search for the member

1. From the Dashboard, type the member's name into the **Search** box at the top of the page. **NOTE:** The Search Bar will appear at the top of the page regardless of what module you are in**.** You can enter the member's entire name or just part of it. For example, if you are trying to locate "John Smith," you can type in "John Smith," "John," "Jo," "Smith," "Sm," "S," etc.
2. Click the **magnifying glass** *or* hit **Enter** on your keyboard.
3. Did the member name display?
   A. If yes, click the member's hyperlinked name in the search results to navigate to the member's profile. This indicates the member is already in your caseload. You can start adding assessments for that member. Please refer to the Adding a New Assessment Step-by-Step Guide or Demo on the [Outcomes and Assessments Training page] if you need further assistance.
   B. If no, proceed to the *[Perform an advanced search]* section.



Perform an advanced search

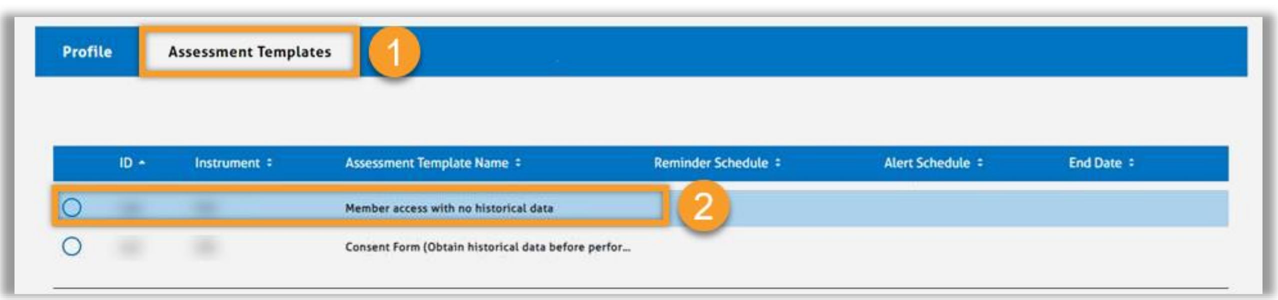
1. The search results may display **No data found**.
2. If this is the case, click the **Advanced search** hyperlink.
3. Enter the search criteria for the member, including First and Last Name, Date of Birth, Identifier Type, and Identifier ID.
4. Click **Search**.



5. If there is a result that matches the entered criteria, the outcomes and assessments system will automatically take you to the member's profile.
6. Determine how you would like to proceed based on the access desired.
   A. To access a member's profile and add assessments *without* historical data, proceed to the [Access to member assessments without historical data]() section.
   B. To access a member's profile and add assessments *with* historical data, proceed to the [Consent Form]() section.

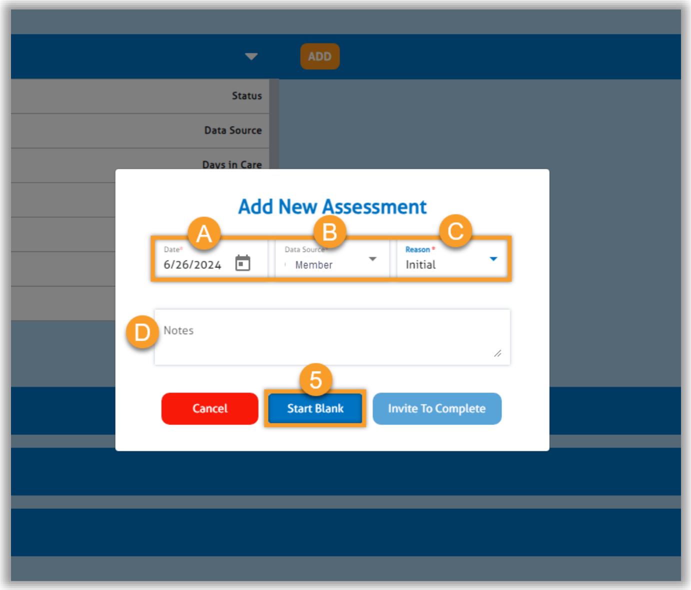
Access to member assessments without historical data

1. To access a member's assessments without historical data, go to the **Assessment Templates** tab in the member's profile.
2. Select the radio button next to the **Member access with no historical data** option.

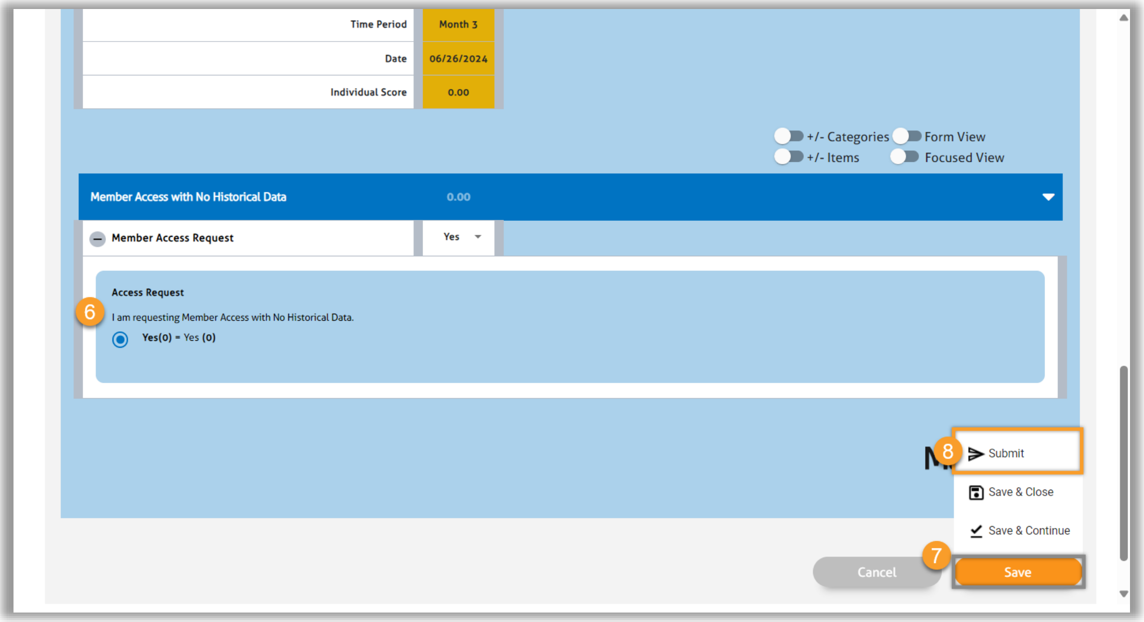


3. After you select the correct form, scroll down and click the **ADD** button to add a new **Member access with no historical data** assessment.

4. Complete the fields of the **Add New Assessment** screen.
    A. **Date** – Auto populates to the **current date** and can be changed if needed.
    B. **Data Source** – Select the member's name as the data source.
    C. **Reason** – Select **Initial**.
    D. **Notes** – Optional and can be used to provide additional information as needed.
5. Click **Start Blank** to open the form.



6. Complete the single question in the form as required.
7. When done, click **Save**.
8. Click **Submit**. This means you are submitting and automatically approving the assessment and you can no longer edit or modify it.

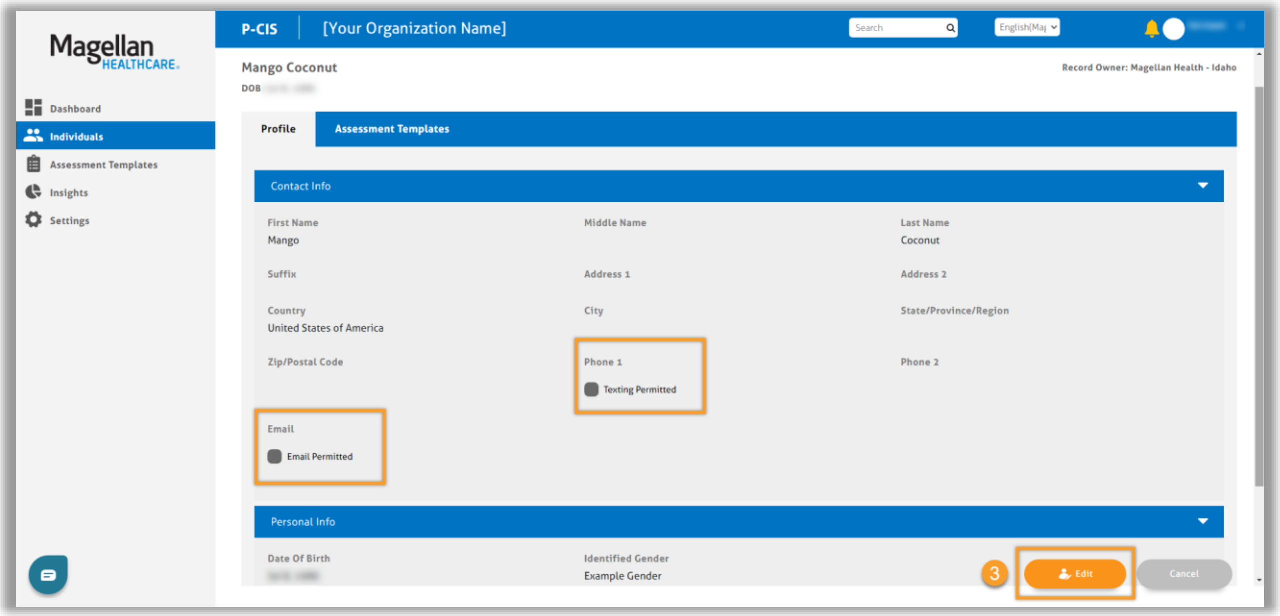


9. After submitting the form, you will now see this member in your caseload and can go into their profile and begin a new assessment.
10. Please refer to the Adding a New Assessment Step-by-Step Guide or Demo on the [Outcomes and Assessments Training page] if you need further assistance.

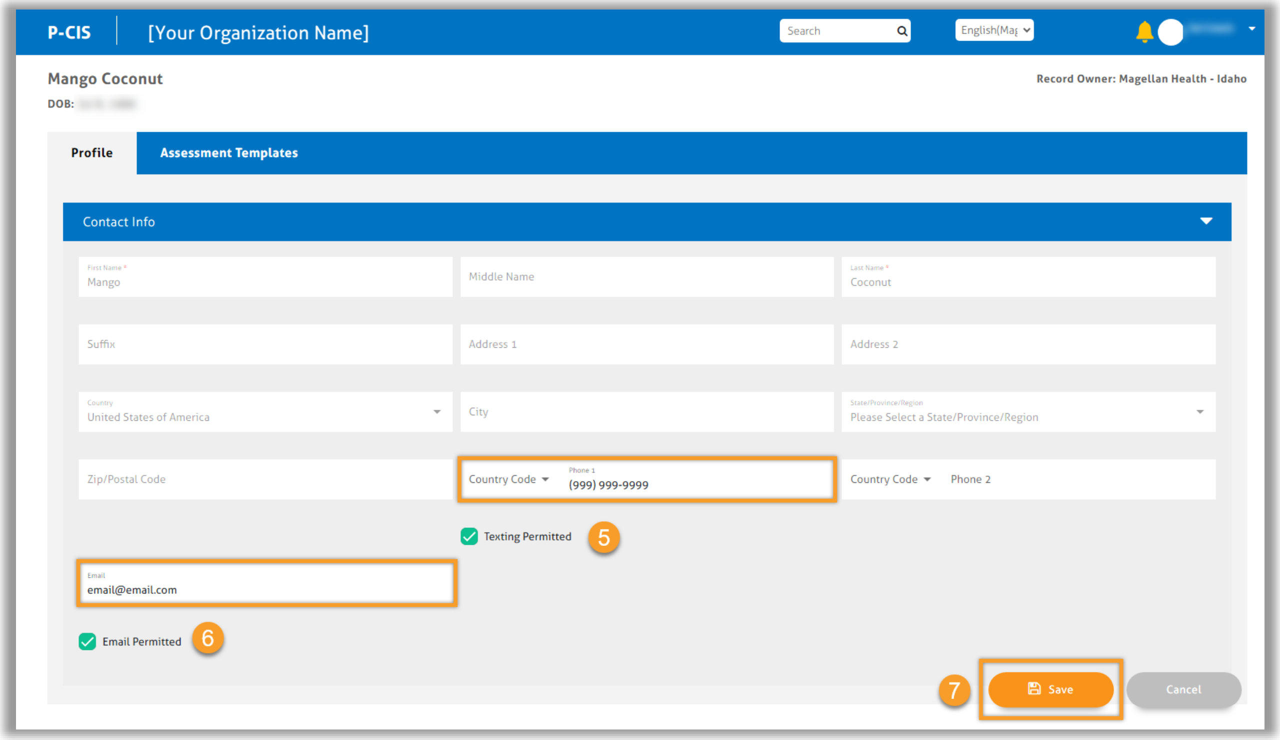
Consent Form

When a provider needs access to historical assessment data in the member profile, the electronic Consent Form functions as the authorization to use and disclose (AUD) protected health information (PHI) to document the member's consent.

1. To access the historical data before performing an assessment, you will first need to verify that there is a phone number and/or email address within the **Contact Info** section of the member's profile.
   NOTE: To send the Consent Form to the member/guardian, there must be an email address and/or a phone number on file for the member or the natural support. This is how the form will be sent to them if the member/guardian is not physically present.
2. Does the member or natural support have a phone number and/or an email address on file?
   A. If yes, then proceed to the *Adding consent* section.
   B. If no, then proceed to *Step 3.*
3. Click **Edit.**



4. Enter a phone number in the **Phone** field and/or enter an email address in the **Email** field for either the member or for the natural support.
   NOTE: When editing the member's profile, it is important that you do not edit anything other than phone number and/or email address. All other fields must remain untouched.
5. If you entered a phone number, check the box for **Texting Permitted.**
6. If you entered an email address, check the box for **Email Permitted.**
   NOTE: Be sure to ask the member/natural support whether they prefer to be contacted via email or mobile phone.
7. Click **Save.**



8. You can now proceed to the *Adding consent* section.

Adding consent

If the member is found in an advanced search and you would like to access historical assessment data, this indicate a Consent Form will need to be signed.

NOTE: After a Consent Form is submitted by the member/guardian, Magellan Compliance staff need 24-48 hours to review and approve the Consent Form for you to have access to the member's profile with historical assessment data.

Adding consent – member/guardian is present

If the member/guardian is present, the member/guardian can sign the Consent Form in your office. You can refer to the Adding a New Assessment Step-by-Step Guide or Demo on the Outcomes and Assessments Training page for further steps.

Adding consent – member/guardian is not present

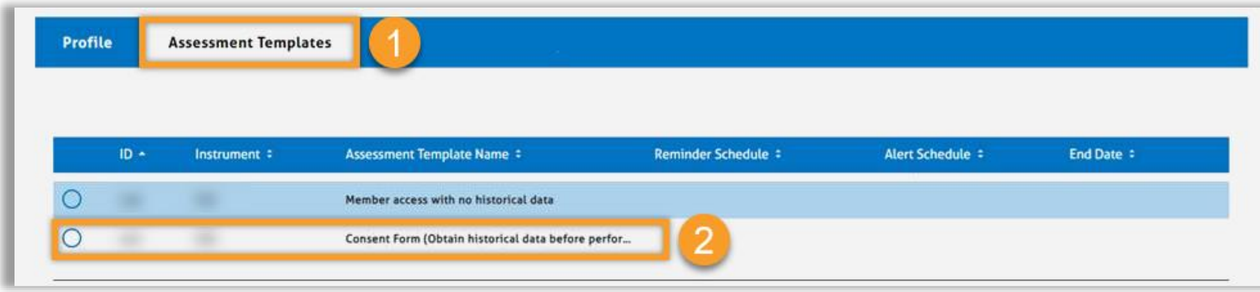
If you need to access historical assessment data during an initial appointment, it is recommended that a member new to services be located within the outcomes and assessments system prior to scheduling the initial appointment. In this case, the member/guardian may not be present to sign the Consent Form with you and you should follow the steps below.

TIP: While you are on the phone scheduling an appointment, you can send the Consent Form to the member or natural support person, using the steps below, and give instructions on completing the

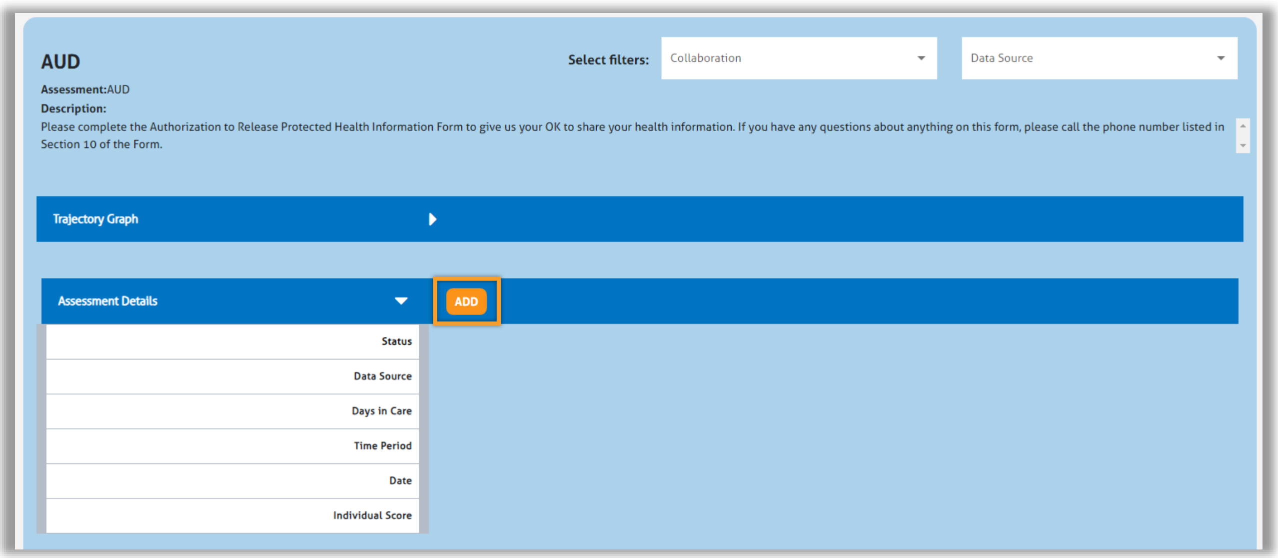
Consent Form. Although the provider cannot pre-fill the form, the provider can assist the member over the phone to complete the Consent Form. Remember that all applicable sections will need to be completed. A member over the age of 14, a parent of a youth under age 14, or an "Authorized Representative" can sign the Consent Form. Please see the instructions on completing the Member Authorization for Use and Disclosure of/Consent to Release Protected Health Information on the [Magellan Healthcare of Idaho website](#).

To add a new Consent Form without the member or guardian present:

1. From the member's profile, click the **Assessment Templates** tab.
2. Click the radio button to open the **Consent Form (Obtain historical data before performing assessment)** assessment.



3. Click the **ADD** button.



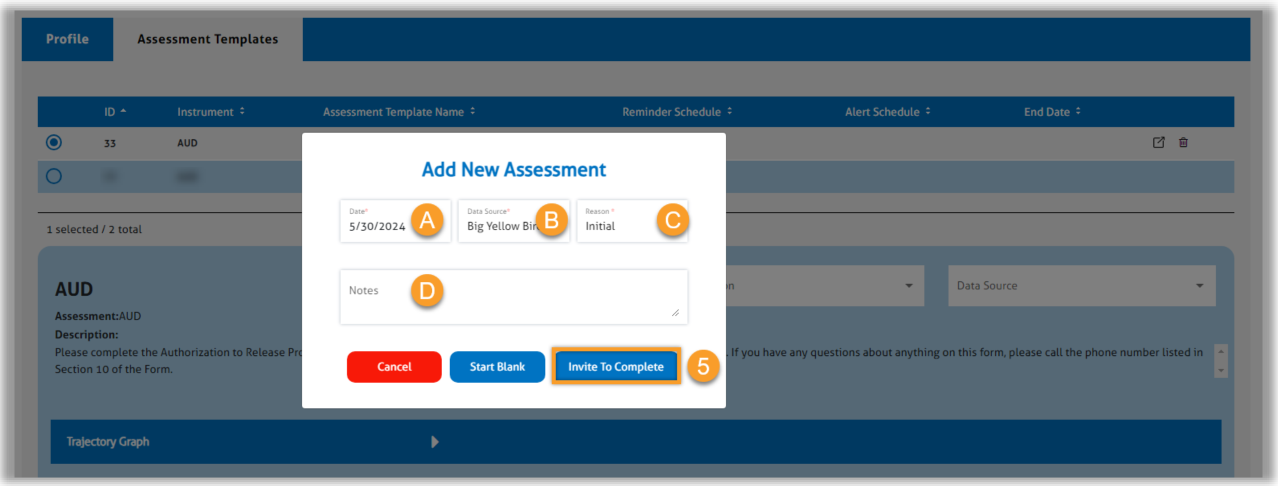
4. Complete the fields of the Add New Assessment screen.
   A. **Date** – Auto populates the **current date** and can be changed if needed.
   B. **Data Source** – Select the appropriate option for the Consent Form and whose email address or phone number has been added to the profile. In this case, it should be either the member or the "natural support" or parent/guardian, depending on who will be completing the assessment and who is marked for email or phone contact in the member's profile.

C. **Reason** – Select **Initial**.

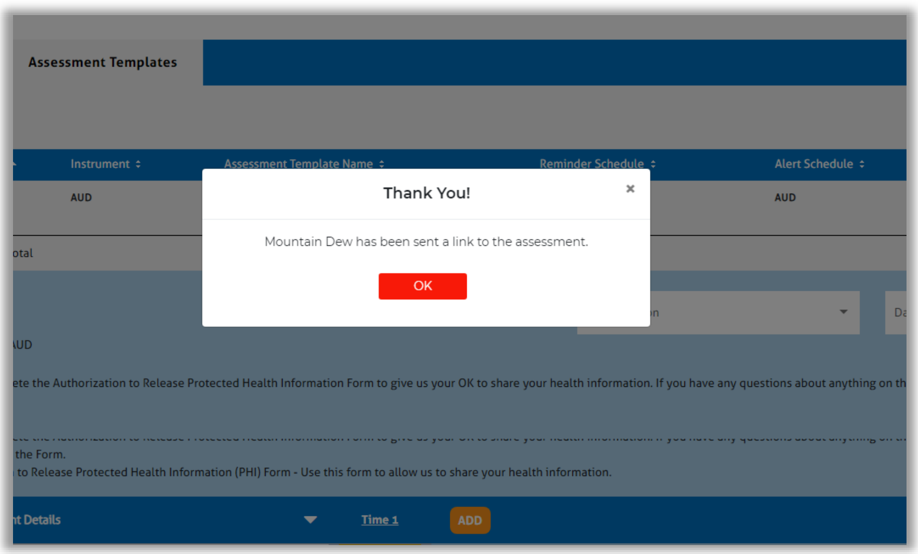
D. **Notes** – Optional and can be used to provide additional information as needed.

5. Click the **Invite to Complete** button. This will send a link to the member's or their natural support (support person/family member/guardian) person's email or phone number indicated in the member's profile.

   NOTE: If the permission to email and/or text box(es) have not been selected in the member's profile, the **Invite to Complete** button will be light blue and cannot be clicked. You must go back to the profile to edit and select the applicable permission. Be sure to ask the member or natural support whether they prefer to be contact via email or mobile phone.

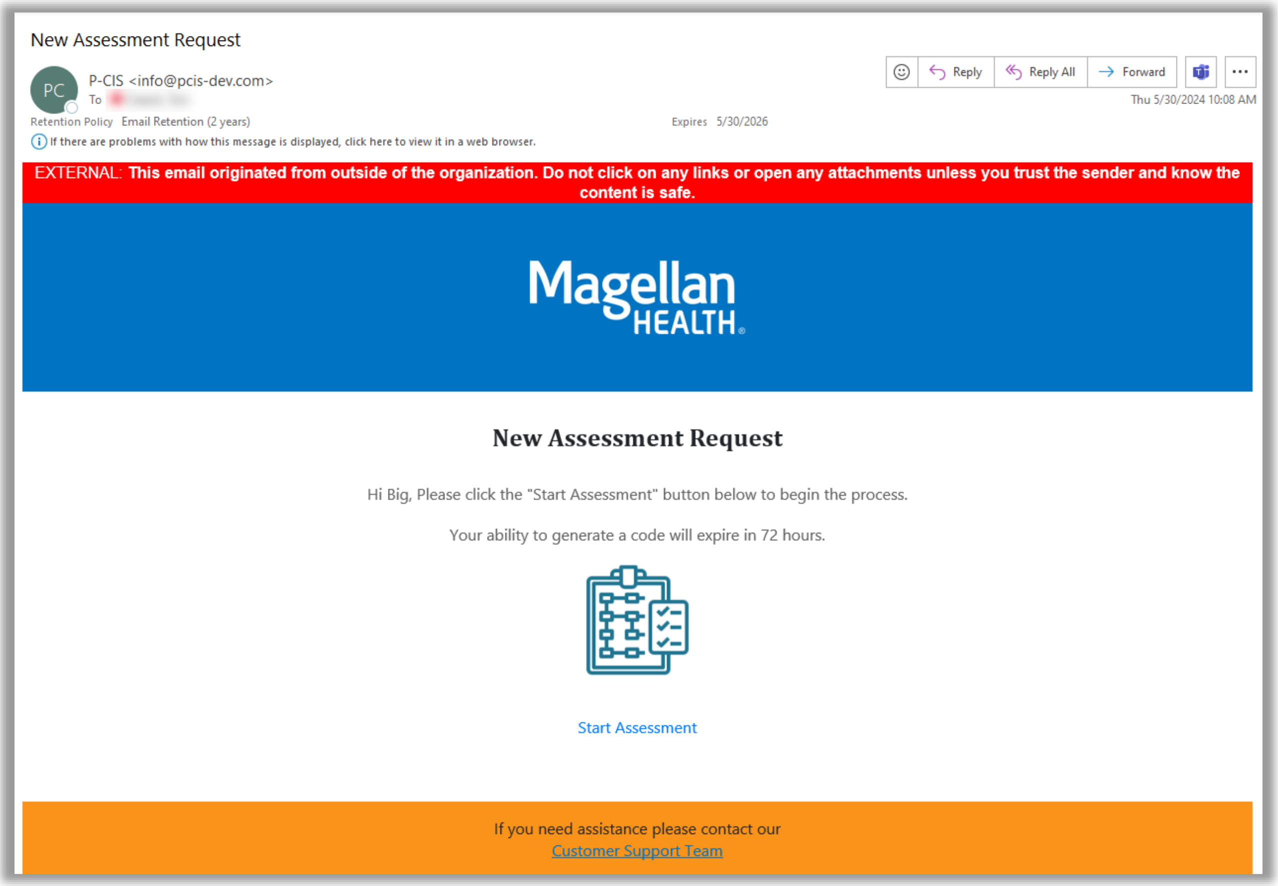


6. A **Thank You!** window will appear indicating that the natural support has been sent a link to complete the consent assessment. Click **OK**.

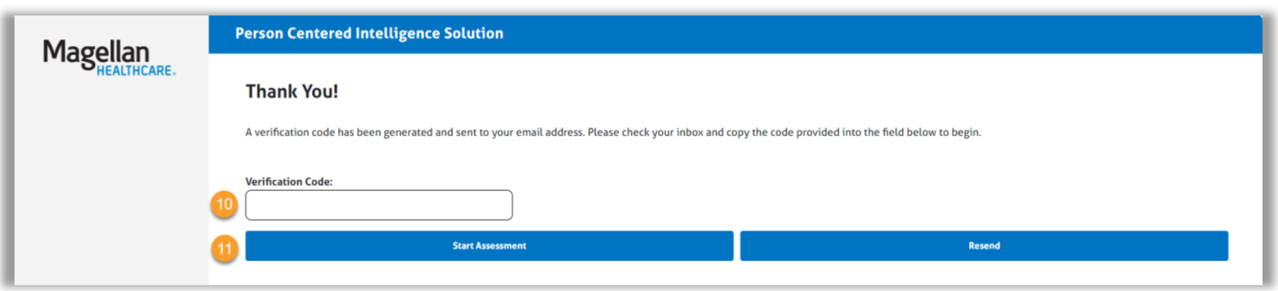


7. An email from *info@pcis.com* will arrive with the Subject of "New Assessment Request." Within the email will be a **Start Assessment** link. This will take the member or natural support person to the outcomes and assessments system to complete the Consent Form.

NOTE: This link is only good for 72 hours. If the link expires, the user can send an Invitation to Complete a Consent Form again to generate a new link.



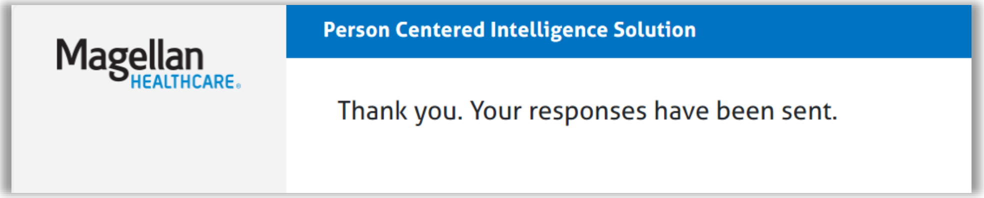
8. The link will take the member or natural support person to a verification screen for two-factor identification.
9. A verification code will automatically be sent to the member's or natural support person's email address or phone number.
10. Copy and paste the verification code into the **Verification Code** field.
    NOTE: This code is only valid for 5 minutes. If the code has expired, request a new code by selecting **Resend**.
11. Click **Start Assessment**.



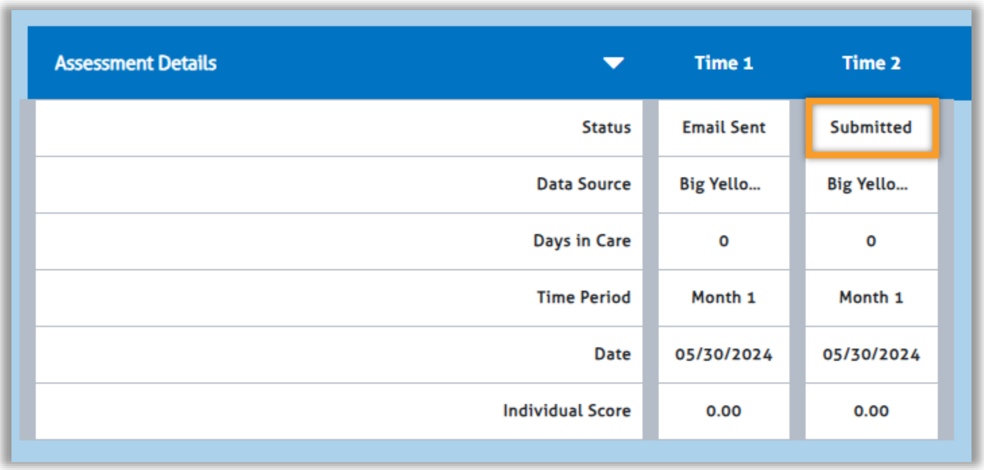
12. Following verification, the member or natural support person will complete the Consent Form in the system and will sign, date, and submit. The signature may be captured via a touch screen,

tablet, touch pad, or mouse. The form does *not* need to also be mailed, faxed, or emailed once signed and submitted.

13. When the Consent Form is successfully submitted, the member or natural support person will receive a *"Thank you. Your responses have been sent"* message.



14. As a user in the outcomes and assessments system, you can see when the Consent Form has been successfully submitted. It will display a status of **Submitted**. Magellan Compliance staff still need 24-48 hours to review and approve the Consent Form for you to have access to the member's profile with historical data.



Assessment Details	Time 1	Time 2
Status	Email Sent	Submitted
Data Source	Big Yello...	Big Yello...
Days in Care	0	0
Time Period	Month 1	Month 1
Date	05/30/2024	05/30/2024
Individual Score	0.00	0.00

15. If an assessment needs to be completed but the provider does not yet have permission to view the member's historical data, the provider can use the *Access without historical data* process to complete the assessment.

16. If the Consent Form is approved, the status will change to **Approved** and you will have access to the member's profile and historical data for the duration of the consent. You will be able to see the consent in the member's assessment templates tab as well as in reports, as well as be able to complete other assessments for the member as needed.

Assessment Details	Time 1	Time 2
Status	Email Sent	Approved
Data Source	Big Yello...	Big Yello...
Days in Care	0	0
Time Period	Month 1	Month 1
Date	05/30/2024	05/30/2024
Individual Score	0.00	0.00

17. Consent can be revoked by the member in writing, at which point your access will be end-dated in the outcomes and assessments system.
18. If the Consent Form is not approved, Magellan staff will outreach to the member for consent completion. If an authorized representative signs the Consent Form, the legal documentation of guardianship will be requested.

Additional information on locating the member in the outcomes and assessments system

When locating a member within the system, various scenarios may occur:

1. The member is found in a search. This indicates the member is already in your caseload. You can start adding assessments for that member. Please refer to the Adding a New Assessment Step-by-Step Guide or Demo on the Outcomes and Assessments Training page if you need further assistance.
2. The member is found in a search, but you do not have access to their historical assessment data. This indicates you can start adding assessments for that member but will need to complete a Consent Form to get access to their historical information. Proceed to the *Adding consent* section.
3. If the member is not returned in a basic search, you will need to do an *Advanced search* to find the member and take steps to add them to your caseload.
4. The member is found in an advanced search, indicating that you will need to follow the steps to add this member to your caseload. Either a *Consent Form* needs to be signed to access historical assessment data or the *member access with no historical data process* needs to be completed to add assessments without historical data.
5. The member is not found in an advanced search.
    A. When a member becomes eligible, their outcomes and assessments system record is created the next day. Check the outcomes and assessments system the following day to see if the member can be found as this may be an overnight delay.

B. If access is needed immediately, or if the member still cannot be found the day after the record has been created, the provider should call Magellan at **1-855-202-0983** to file a help ticket. A clinical representative will respond.
C. If a help ticket is filed, the provider should look in the outcomes and assessments system the next day to confirm the member has been added. If you do not find the member, call Magellan again.