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 step-by-step guide demonstrates how access a member's profile to submit new assessments (without historical information).

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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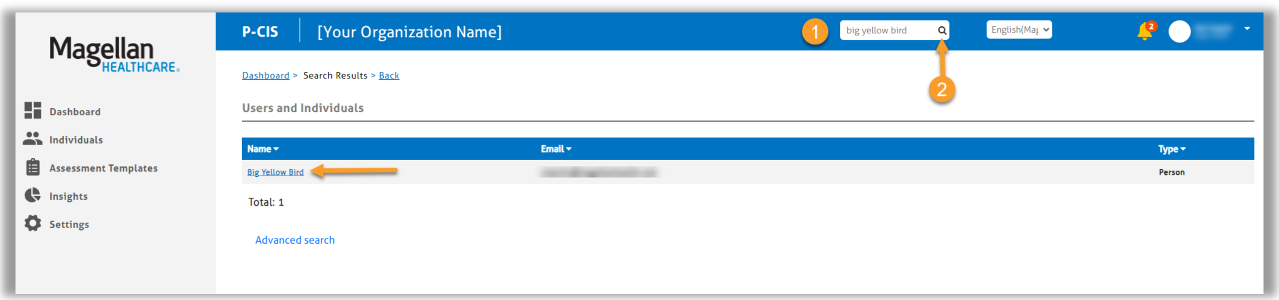
Locating the member in the outcomes and assessments system

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

Search for the member

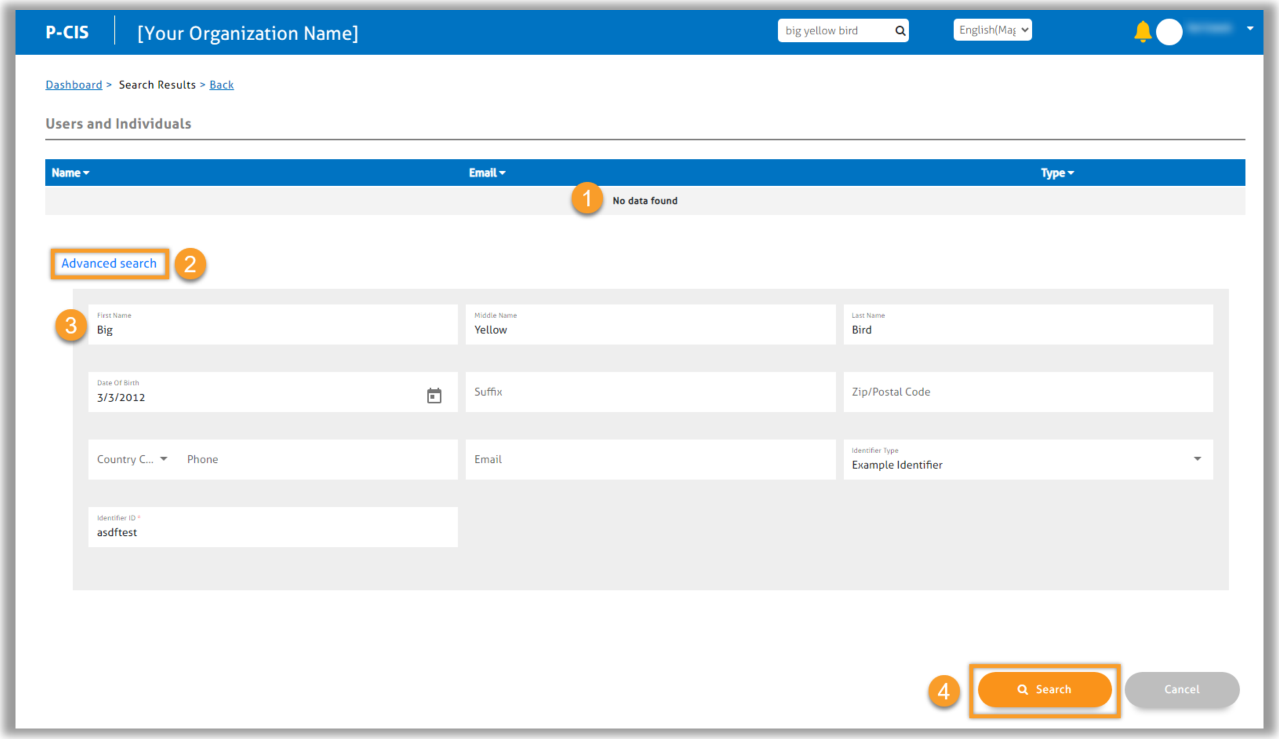
1. From the Dashboard, type the member's name into the **Search** box at the top of the page.
   NOTE: The Search Bar will appear at the top of the page regardless of what module you are in. You can enter the member's entire name or just part of it. For example, if you are trying to locate "John Smith," 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 Adding and Submitting Assessments Demo on the Outcomes and Assessments Training page if you need further assistance.



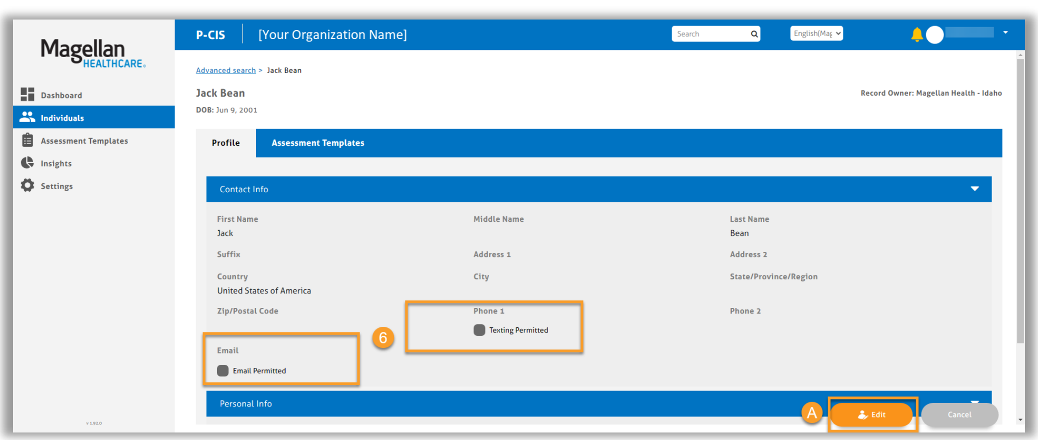
   B. If no, proceed to the *Perform an advanced search* section.

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.
   NOTE: Be sure you do not add any spaces in front of or behind the search criteria fields
4. Click **Search**.

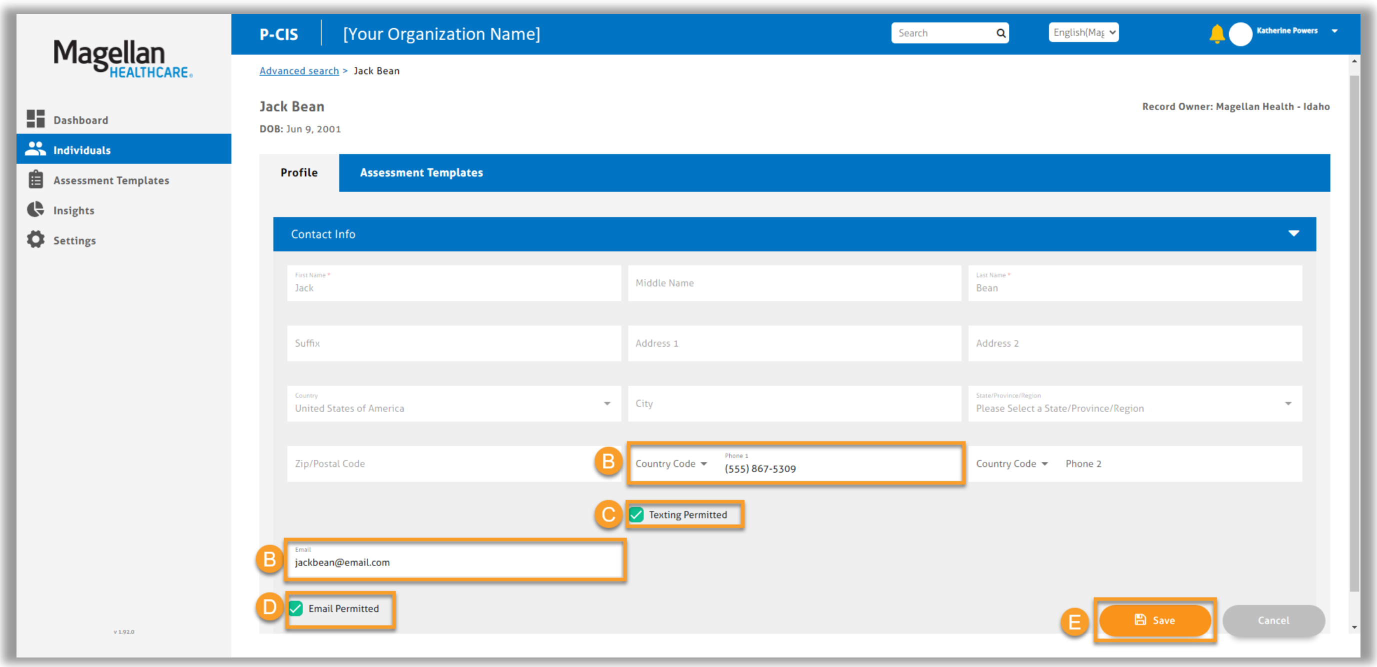


5. If there is a result that matches the entered criteria, the outcomes and assessments system will automatically take you to the member's profile.
6. With the member's profile displaying, you will need to verify that there is a phone number and/or email address within the **Contact Info** of the member's profile and that texting and/or email is permitted by checking the corresponding boxes.
   NOTE: The **only** time you can edit the member's **Contact Info** section is right after you have used Advanced Search to find the member and *prior to* submitting the Member Access with No Historical Data Form (MND). After submission of the MND, you will no longer be able to edit the **Contact Info** section.
   A. To add an email and/or phone number, click **Edit**.



   B. Enter the 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.

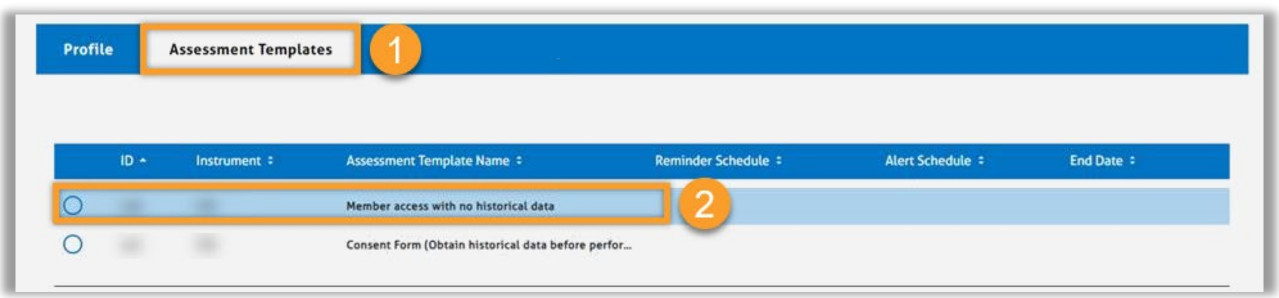
C. If you entered a phone number, after verifying with the member, check the box for **Texting Permitted**.
D. If you entered an email address, after verifying with the member, check the box for **Email Permitted**.
E. Click **Save**.



7. Proceed to the [*Access to member assessments without historical data*](#) section.

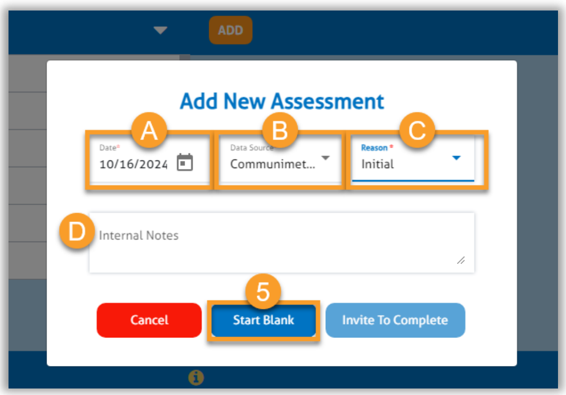
Access to member assessments without historical data

1. 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.

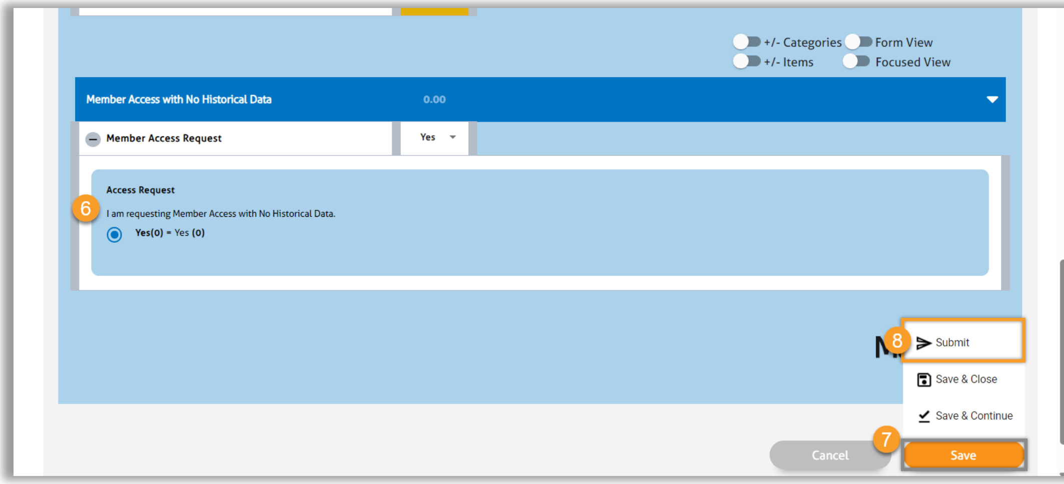


3. After you select the correct form, scroll down and click the **ADD** button to add a new **Member access with no historical data** assessment.

4. Complete the fields of the **Add New Assessment** screen.
   A. **Date** – When adding a new assessment, enter the date you first completed the assessment with the member.
   NOTE: If you use today's date, *you will not be able to backdate any assessments to any dates prior to today*.
   B. **Data Source** – Select Communimetric.
   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. Scroll down and answer **Yes** to the one question Member Access Request: I am requesting member access with no historical data.
7. Once you answered yes, 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 this form, you will now see this member in your caseload under Individuals and have access to their profile to begin a new assessment.
10. Please refer to the Adding a New Assessment Step-by-Step Guide or Adding and Submitting Assessments Demo on the Outcomes and Assessments Training page if you need further assistance.
11. Please refer to the Consent Process Step-by-Step Guide for directions on sending the member the Authorization to Use and Disclose PHI (AUD) form to allow for you to access member records and historical data.

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

When locating a member within the system, the member may not be found in an advanced search. This could be because:

1. 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.
2. 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 an IT help ticket. A clinical representative will respond.
3. If an IT 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.