



Centers for Medicare & Medicaid Services
CMS eXpedited Life Cycle (XLC)

Communications Relational Assurance Database (CRAD)

User Manual/Help Guide

Version 2.0
05/19/2018

Contract Number: HHSM-500-2017-00022

Table of Contents

Table of Contents	2
1. Introduction	3
2. Overview	3
3. Getting Started	3
3.1 Set-up Considerations	3
3.2 User Access (Via Front-End Interface)	3
3.3 Accessing the System	4
3.3.1 Login	4
3.3.2 Description of the Homepage After Login	5
3.3.3 Navigation	6
4. Using the System	6
4.1 Scorecard	6
4.2 Add Scorecard	7
4.3 Reports	10
4.3.1 Report Result Screen	10
4.3.2 List of Reports	11
4.4 Forms Upload	12
4.5 Rebuttal List	16
4.6 User Management	18
4.6.1 Create Users	18
4.6.2 List of Users	19
4.6.3 MAC Assignment	20
4.6.4 MAC List	20
4.6.5 Jurisdiction List	21
4.6.6 Program List	21
4.6.7 Location List	22
4.6.8 MAC Mapping	22
4.7 My Account	22
4.8 Support	23
Appendix A: Acronyms	24
Approvals	25

1. Introduction

CMS oversees the performance of 16 MAC Jurisdiction contracts and a network of 17 Provider Contact Centers (PCCs) that administer provider customer service by responding to provider inquiries in support of the Provider Customer Service Program (PCSP).

This includes:

- Quality monitoring of calls from Medicare providers to Medicare Administrative Contractor (MAC) Customer Service Representatives (CSRs).
- Developing, implementing, and using a Communications Relational Assurance Database (CRAD) to record and store QAM information and generate user-defined reports.

The CRAD shall have the capability to produce and aggregate QAM information as defined by users for analysis and review by CMS and the MACs.

2. Overview

The Communications Relational Assurance Database (CRAD) is a web application that supports the business processes related to the evaluation of Medicare Administrative Contractor (MAC) Customer Service Representatives' (CSRs) responses to provider inquiries. The CRAD is built to record and store QAM Scorecard results and produce reports for CMS and the MACs. The CRAD has the functionality of the current QAD and PQM Portal, including the ability to accommodate any future changes to MACs and MAC jurisdictions as directed by the CMS Contracting Officer's Representative (COR).

3. Getting Started

The following sections describe processes and procedures for accessing the CRAD System.

3.1 Set-up Considerations

CMS screens are designed to be viewed at a minimum screen resolution of 800 x 600. To optimize your access to the CRAD, the screen resolution should be set to 1024 x 768 or higher.

Access to the Internet is required as the CRAD is a web-based application. The following Internet browsers are compatible for the CRAD:

1. Internet Explorer, version 8.0 or higher
2. Chrome

3.2 User Access (Via Front-End Interface)

- **Administrator:** Views and modifies all CRAD components and data.
- **Quality Manager:** Views and modifies all components and data of the CRAD as they relate specifically to QAM.
- **CMS User:** Views all components of the CRAD as they relate specifically to QAM. May also modify data for specific components (In My Account page change password).
- **MAC Administrator:** View Home, view Scorecard, view My Account, view Resources, view and upload CSR List, Add Rebuttals and Add users in the User Management.
- **Quality Monitor (QM):** Views and modifies Scorecard of the CRAD as they relate specifically to QAM. Has full modify access for the Scorecard forms.
- **MAC User:** View Home, view Scorecard, view My Account, view Resources, view and upload CSR List, add Rebuttals.

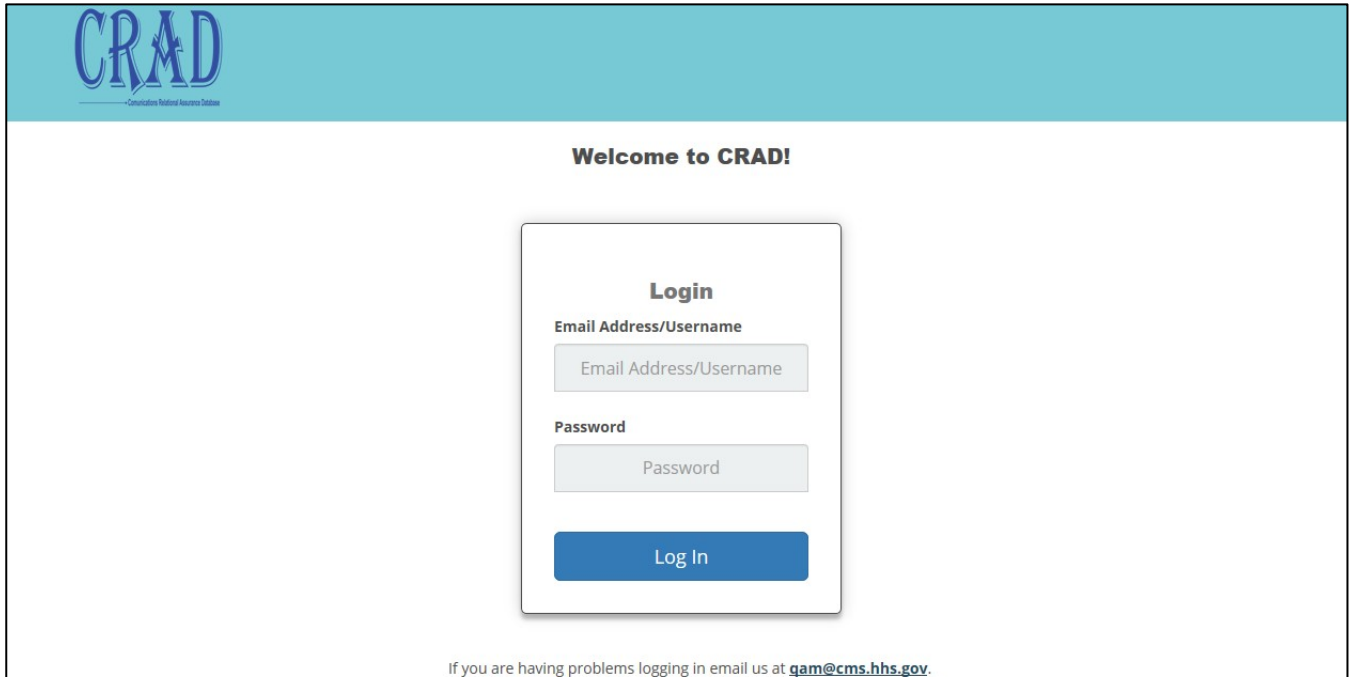
Table 1 - User /Role Accesses

No	User/Role	Accesses
1	Administrator	Home, Scorecard, Reports, Forms Upload, Rebuttals, User Management, My Account, Resources
2	Quality Manager	Home, Scorecard, Reports, Rebuttals, My Account, Resources
3	CMS User	Home, Reports, Forms Upload, Rebuttals, My Account, Resources
4	MAC Administrator	Home, Scorecard, Forms Upload, Rebuttals, User Management, My Account, Resources
5	Quality Monitor	Home, Scorecard, My Account, Resources
6	MAC User	Home, Scorecard, Forms Upload, Rebuttals, My Account, Resources

3.3 Accessing the System

3.3.1 Login

- Users will login with a unique username and password created by the System Administrator
- The Login page displays information about the system.



CRAD
Communication Relational Access Database

Welcome to CRAD!

Login

Email Address/Username

Email Address/Username

Password

Password

Log In

If you are having problems logging in email us at gam@cms.hhs.gov.

Figure 1: Welcome Screen

3.3.2 Description of the Homepage After Login

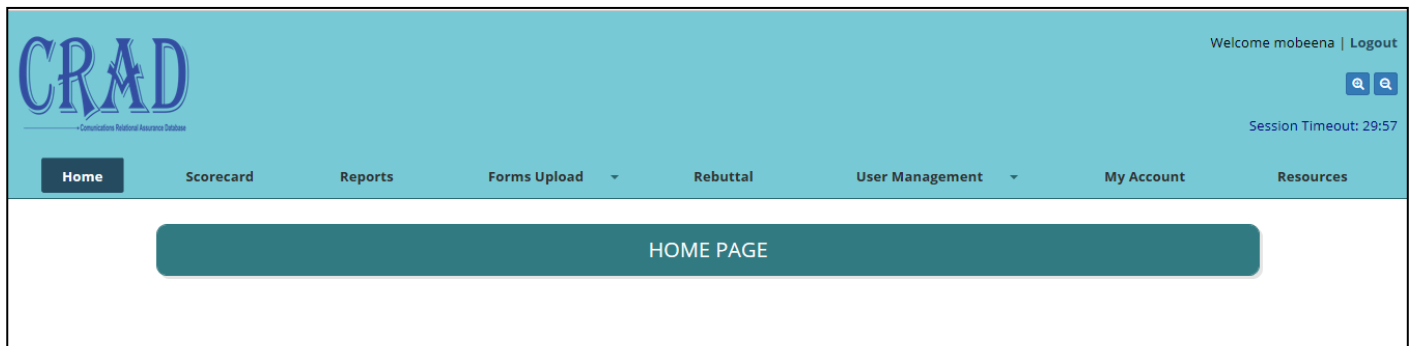


Figure 2: Home Page

The Homepage displays the following:

- Username, Logout button, Screen Magnifier Icon and Session Timeout display at the top right corner. Display of Home, Scorecard, Reports, Forms Upload, Rebuttal, User Management, My Account and Resources Menu.
- Hyperlinks to Home, Privacy, Security and Disclaimer at the bottom right corner.

3.3.3 Navigation

Upon successful login, the Homepage displays the following menu items

- Home
- Scorecard: CRAD stores all completed Scorecards created for the QAM program. It displays a list of all saved Scorecards and give all valid users the ability to view the completed Scorecards. The Scorecard display list contains navigation tools to allow users to access all completed scorecards based on their role.
- Reports: The CRAD creates Scorecard, rebuttal, compliance and non-compliance reports. Users select and create reports from the backend database.
- Forms Upload: This menu option displays two submenus where a user can download and upload CSR List. Users can also download and upload QAM environmental Change Control Form.
- Rebuttal: The CRAD allow users to create a rebuttal to a failed Scorecard. The CRAD will also enable users to edit and view rebuttals created and saved to CRAD.
- User Management: The CRAD menu user management allow users to:
 - Create new users
 - Edit users saved to the CRAD
 - View users saved to the CRAD
 - Activate and Inactivate users
- My Account: All Users will be able to view the information in their personal my account page
- Resources: All Users will be able to view the helpful resources presented via the resource menu.

4. Using the System

4.1 Scorecard

1. This page shows different Scorecard search filters. Users can filter their search by selecting one of the following:
 - Select **MAC** gives user the option to choose a range of 1 to all MACs.
 - Select **Jurisdiction** gives user the option to choose a range of 1 to all MACs.
 - Select **Status** gives user the option to choose All, Pass, or Fail.
 - Selecting QM ID gives user options to search by Quality Monitor ID. Quality Monitor ID is a randomly generated ID by the CRAD.
 - Select **Scorecard Type** gives user the option to choose All, Scoreable, Non-Scoreable, or Does Not Count.
 - Select **From Date** to choose the start date of the Scorecard to be viewed.
 - Select **To Date** to choose the end date of the Scorecard to be viewed.
 - Select **Filter** button to filter results.
 - Select **Reset** button to reset field.

- Select **Add Scorecard** button to add new Scorecard.
- After the result has been filtered, the list of Scorecards is displayed below the page showing the selected fields. From this, User can:
 - Copy the result displayed in the current page.
 - Open/Save in **Excel** or PDF format.
- If a user clicks on view in **Excel** or PDF accidentally, the system provides an option to cancel what was clicked.
- Also, the system will enable user to click **Next** button to go to the next page if the result to be viewed is more than one page.
- The system will also enable user to click **Previous** button to go back to the previous page.
- User will be able to view results by clicking on any of the fields displayed (MAC, Jurisdiction, MAC Call Reference ID, QM Name/ID, QM Start Date/Time, Scorecard Type, Status and Actions). User can also search field via the Search box.
- The system allows user to see the number of entries that was filtered at the bottomleft of the page.

LIST OF SCORECARDS

Scorecard Search Filters

MAC: ALL

Jurisdiction: ALL, JA, JS, JC

Status: ALL

Scorecard Type: ALL

From Date: To Date:

Filter Reset Add Scorecard

Show 10 entries

Showing 1 to 10 of 178 entries

MAC	Jurisdiction	MAC Call Reference ID	QM Name/ID	QM Start Date/Time	Scorecard Type	Status	Actions
			Test007	01/17/2018 05:59:10 AM	Scoreable		
			Test007	01/17/2018 09:41:29 AM	Scoreable		
		J_F_MAAK01/18/2018 12:41:28 AM	Test007	01/18/2018 07:41:28 PM	Scoreable	Fail	
			Test007	01/18/2018 08:47:24 AM	Scoreable		
			Test007	01/18/2018 08:48:36 AM	Scoreable		
		J_B_MA_01/18/2018 02:21:08 PM	Test007	01/18/2018 09:21:08 AM	Scoreable	Fail	
			Test007	01/19/2018 09:53:25 AM	Scoreable		
			Test007	01/19/2018 06:03:35 AM	Scoreable		
		J0MAAG120180123_10100100 AM	mobesna	01/23/2018 11:28:16 AM	Scoreable	Fail	
		J0MAAK20180316_010000	mobesna	01/24/2018 09:16:04 AM	Scoreable	Pass	

Copy Excel PDF

Previous 1 2 3 4 5 18 Next

Figure 3: List of Scorecards

4.2 Add Scorecard

To add Scorecards, Users are required to fill the following information

- QAM Information

Except the Scorecard Type, rest of the fields are not editable. Information is populated automatically.

- QM Name/QM ID
- Select Scorecard Type (Scoreable, Non-Scoreable, Does Not Count)
- Select QM Start Date/Time
- Check box if call is related to New Medicare Card call Tracking

- QAM Contact Information

- ▢ Call Monitoring Date
- ▢ IMD-System Screen Access
- ▢ MAC
- ▢ MAC Jurisdiction
- ▢ Select Program
- ▢ Select LOB
- QAM Call and CSR Information
 - ▢ Call Time (The actual time the call was made)
 - ▢ Call Duration (Length of call)
 - ▢ CSR Full Name (The CSR that received the call)
 - ▢ CSR Levels - CSR level 1,2
 - ▢ Call Language (English or Spanish)
 - ▢ MAC Call Reference ID (CRAD will auto-populate this when CSR Full Name is inputted)
 - The format for the field is:
(JurisdictionCSR1stInitialLastNameYearMonthDay_Time).
 - ▢ Call Category:
 - ▢ Call Sub-Category which differs based on the Call Category selected. Select the Call Sub-category according to the Call category.
- Knowledge Skills
 - If a User selects “Yes”, then the cursor moves to the next question.
 - If a User selects “No” for Provision of Accurate Information, User will be required to provide Accuracy Call Failure Reason and Accuracy Call Failure Time.
 - If a User selects “No” for Provision of Complete Information, User will be required to provide Completeness Call Failure Reason and Completeness Call Failure Time.
- Adherence To Privacy
 - If a User selects “Yes,” then the cursor moves to the next question.
 - If a User selects “No” for Adherence To Privacy procedures, User will be required to provide Privacy Call Failure Reason and Privacy Call Failure Time which is available via a dropdown for users to choose from
- Customer Skills
 - If a User selects “No” for Customer Skills, User will be required to provide Customer Skills Call Failure Reason and Customer Skills Call Failure Time which is available via a dropdown for users to choose.
- Call Result
 - ▢ This will be auto generated based on the above selected field.
- User will be required to write Call Failure Reason Comments in the first text box and if needed, additional comments can be added in the second text box. After all these fields have been correctly filled and selected, User will select **Save** button to save what has been inputted.
- Select **Close** button to close the Page.

SAVE/UPDATE SCORECARD

Save
Close

Section 1 - QAM Information

QM Name/QM ID:

QM Start Date/Time:

Scorecard Type:
☒ Scoreable ☐ Non-Scoreable ☐ Does Not Count

QM End Date/Time:

Section 2 - QAM Contract Information

Call Monitoring Date:

MAC:

Program:

Jurisdiction:

LOB:

Section 3 - QAM Call and CSR Information

Call Time:

CSR Full Name:

Call Language:

Call Category:

Call Duration:

CSR Level:

MAC Call Reference ID:

Call Sub Category:

Section 4 - Knowledge Skills

Did the CSR provide accurate information? If 'No' was selected , please enter reason in text box below:
☐ Yes ☐ No

Did the CSR provide complete information? If 'No' was selected , please enter reason in text box below:
☐ Yes ☐ No

Section 5 - Adherence to Privacy

Did CSR follow privacy procedures? If 'No' was selected , please select the reason below:
☐ Yes ☐ No

Section 6 - Customer Skills

Was the CSR courteous, friendly, and professional? If 'No' was selected , please select the reason below:
☐ Yes ☐ No

Section 7 - Call Result

Call Result:

Additional Comments Box:

Save
Close

Figure 4: Save and Update Scorecards

4.3 Reports

- User will be able to generate Scorecard, Compliance, Rebuttal or QASP Reports by selecting these fields via dropdowns
 - MAC
 - Jurisdiction
 - Program
 - PCC/Location
 - From Date
 - To Date
 - Scorecard Type
 - Call Result
- After the appropriate fields have been selected, User will select **Generate Report** to view the Report. User can also select the **Reset** button to clear field.
- View contractor Information via the dropdown on the Report Menu, clicking on this dropdown will enable user to either **Open, Save or Cancel** the document to be opened.
- This document will be opened in a separate window on the computer.
- The document can also be saved on the user preferred location on the computer.

The screenshot shows the 'SEARCH REPORT SCREEN' interface. It features a teal header bar. Below the header, the form is organized into two columns. The left column contains dropdowns for 'MAC' and 'Program', followed by a 'From Date' text input. The right column contains dropdowns for 'Jurisdiction' and 'PCC/Location', followed by a 'To Date' text input. Below these, there are radio buttons for 'Report Type' (Scorecard, Compliance, Rebuttal), a 'Scorecard Type' dropdown (set to 'ALL'), and a 'Call Result' dropdown (set to 'Both Pass and Fail'). At the bottom of the form are two blue buttons: 'Generate Report' and 'Reset'.

Figure 5: Search Report Screen

4.3.1 Report Result Screen

- Click Back button to return to Search Report Screen page.
- Results can be downloaded in **Excel** and **PDF** format.
- Results can also be copied from the CRAD.
- If a user clicks on any of the export options, the system will provide an option to **Open, Save or Cancel**.
- Select any of the three options.

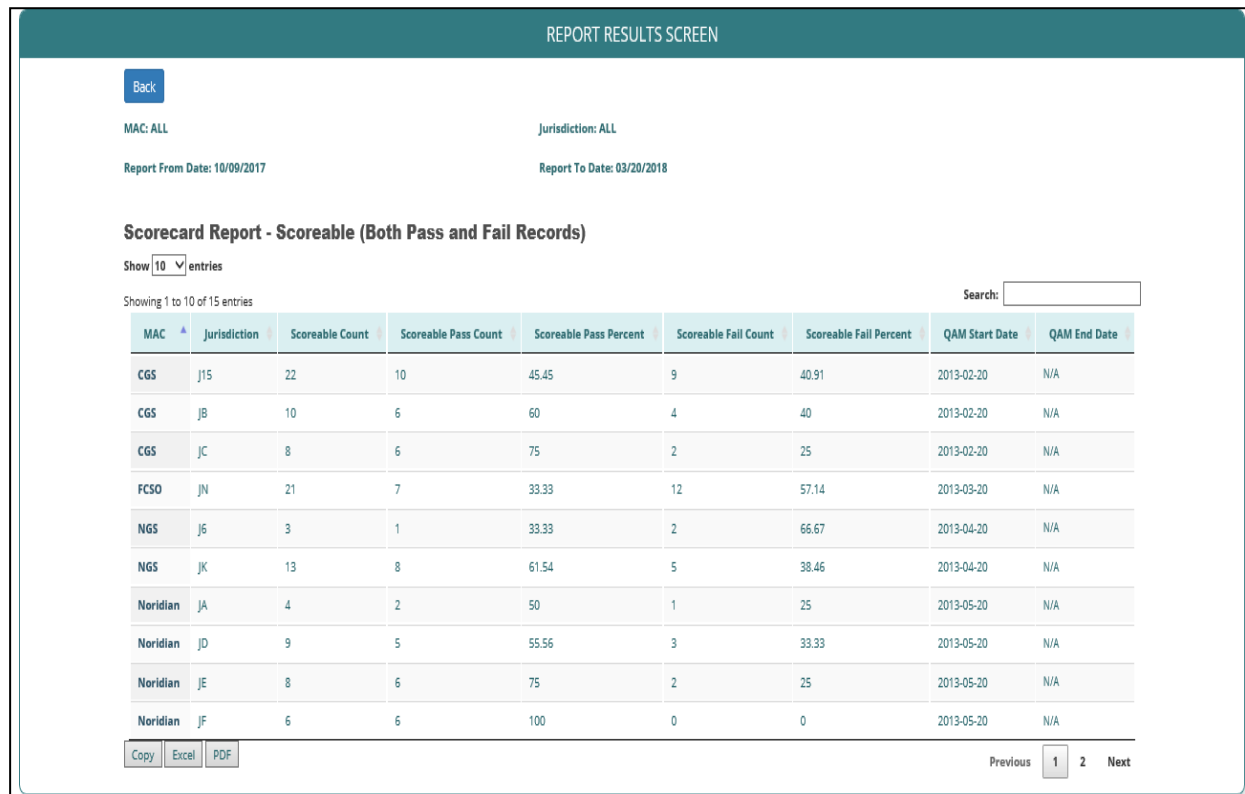


Figure 6: Reports Result Screen

4.3.2 List of Reports

- 1. Scoreable, Non-Scoreable, Does Not Count Records (Both Pass and Fail)**
Displays Scoreable, Non-Scoreable and Does Not Count records with both pass and fail status. Generated based on selection criteria and dates.
- 2. Scoreable, Non-Scoreable, Does Not Count Records (Pass)**
Displays Scoreable, Non-Scoreable and Does Not Count report with only pass records. Generated based on selection criteria and dates.
- 3. Scoreable, Non-Scoreable, Does Not Count Records (Fail)**
Displays Scoreable, Non-Scoreable, Does Not Count report with only fail records. Generated based on selection criteria and dates.
- 4. Scoreable (Both Pass and Fail Records)**
Scoreable report with both the pass and fail records. Generated based on selection criteria and dates.
- 5. Scoreable (Only Pass Records)**
Scoreable report with only pass records. Generated based on selection criteria and dates.
- 6. Scoreable (Only Fail Records)**
Scoreable report with only fail records. Generated based on selection criteria and dates.
- 7. Non-Scoreable Records**
Non-Scoreable report with only non-scoreable records. Generated based on selection criteria and dates.
- 8. Does Not Count Records**
Does not count type report with only does not count records. Generated based on selection criteria and dates.
- 9. QASP (Both Pass and Fail Records)**
QASP reports are aggregated Scorecard reports generated for pass and failed statuses. User

will be able to generate the report based on varied selection criteria's and dates.

10. Compliance Report (All)

Compliance report is generated for CSR Lists. Compliance is flagged to all the MAC's CSR Lists based on the date uploaded to the CRAD.

11. Non - Compliance Report

Non-Compliance report is generated for CSR Lists. Non-Compliance is flagged to all the MAC's CSR Lists if the MAC uploads CSR Lists to CRAD after 5th day of each month.

12. Rebuttal Report (All)

Multiple types of rebuttal reports are generated based on different filter criteria and dates. Completed, Pending and All is one of the filter criteria to generate the report.

13. Rebuttal Category Report

Multiple rebuttal category reports are generated based on different filter criteria, dates and categories.

4.4 Forms Upload

Forms Upload menu allow user to perform the following:

- CSR menu option allows Users to
 - Download the “**Sample CSR Template**” for uploading the CSR List to CRAD. MAC users should always use the CRAD “**Sample CSR Template**” for loading the CSR user data.
 - **Upload a new CSR List** – CSR information loaded into the CRAD provided template can be uploaded from MAC users computer using “Upload CSR List” button in the CSR List screen. MAC user should upload the CSR List by 5th of each month.
 - Compliance & Non-Compliance:
 - Compliance: MAC users who uploaded the data by 5th of each month are tagged as “**compliant**” in CRAD database.
 - Non-Compliance: MAC users who upload the CSR Lists data after 5th or who don't upload the CSR Lists data for that month are tagged as “**non-compliant**” in CRAD database.
 - ‘**Keep Current List**’ checkbox: If the CSR List **does not** change from last month, MAC users can select “Keep Current List” to notify CRAD to use the last month CSR Lists data as the current month CSR Lists data.
 - Compliance: MAC users who check the “Keep Current List” checkbox by 5th of each month are tagged as “compliant” in CRAD database.
 - Non-Compliance: MAC users who don't check the “Keep Current List” checkbox after 5th are tagged as “**non-compliant**” in CRAD database.

Note: MAC users should either upload the CSR Lists to the CRAD or select “Keep Current List” check box to be compliant with QAM policies.

- The CSR List Template is as follows:

	A	B	C	D	E	F	G	H
1	First Name	Middle Name	Last Name	PCC	CSR LEVEL	JURISDICTION	PROGRAM	STATUS
2				Birmingham	Level 1	JJ	ABMAC-A	A
3				Birmingham	Level 1	JJ	ABMAC-A	I
4				Birmingham	Level 1	JJ	ABMAC-A	A
5				Birmingham	Level 1	JJ	ABMAC-A	A
6				Birmingham	Level 2	JJ	ABMAC-A	A

Figure 7: CSR List Template

- Select Download Sample CSR Template to download and view CSR List template or to save a copy of the

template on your computer.

- To upload a new CSR List, click the Browse button and it will take User to the actual location where documents are saved. User can select the folder that contains the CSR List to be uploaded. See Figure:8 below
- The system will ask if User really wants to keep current list by a pop-up confirmation tab. See Figure:9 below
- Selects the file to be uploaded. See Figure:8 below

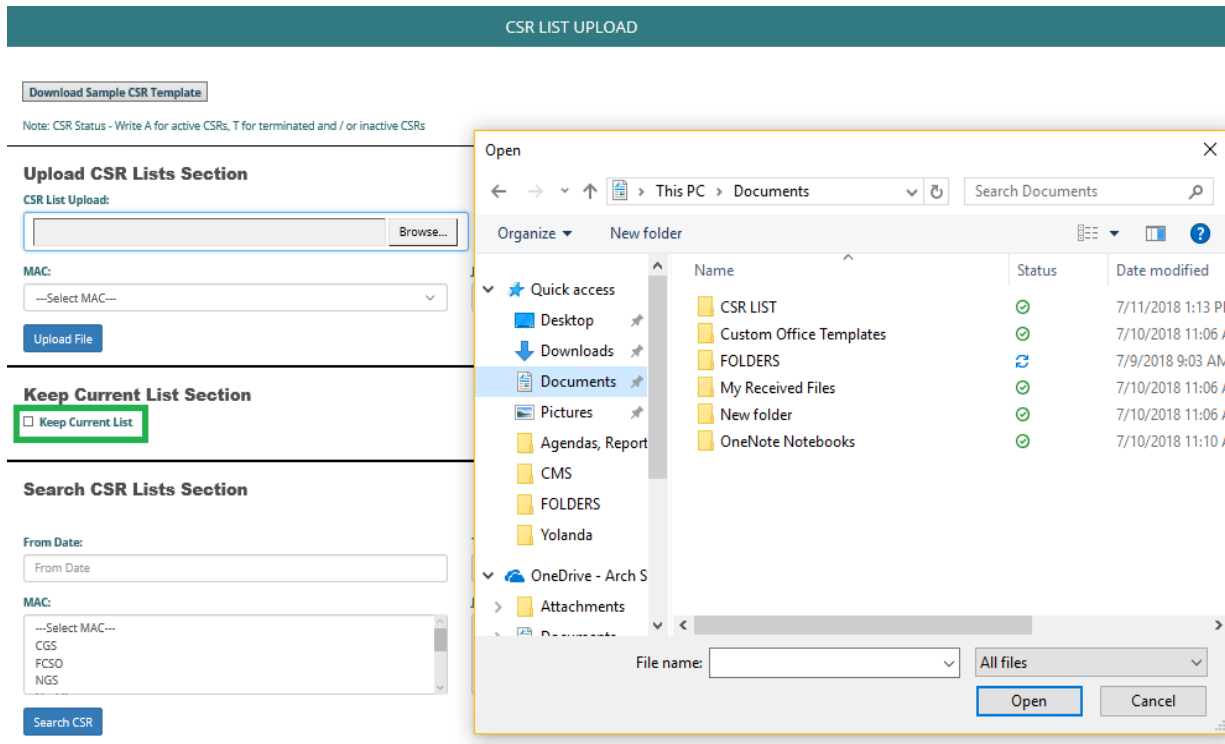


Figure 8: CSR List 1

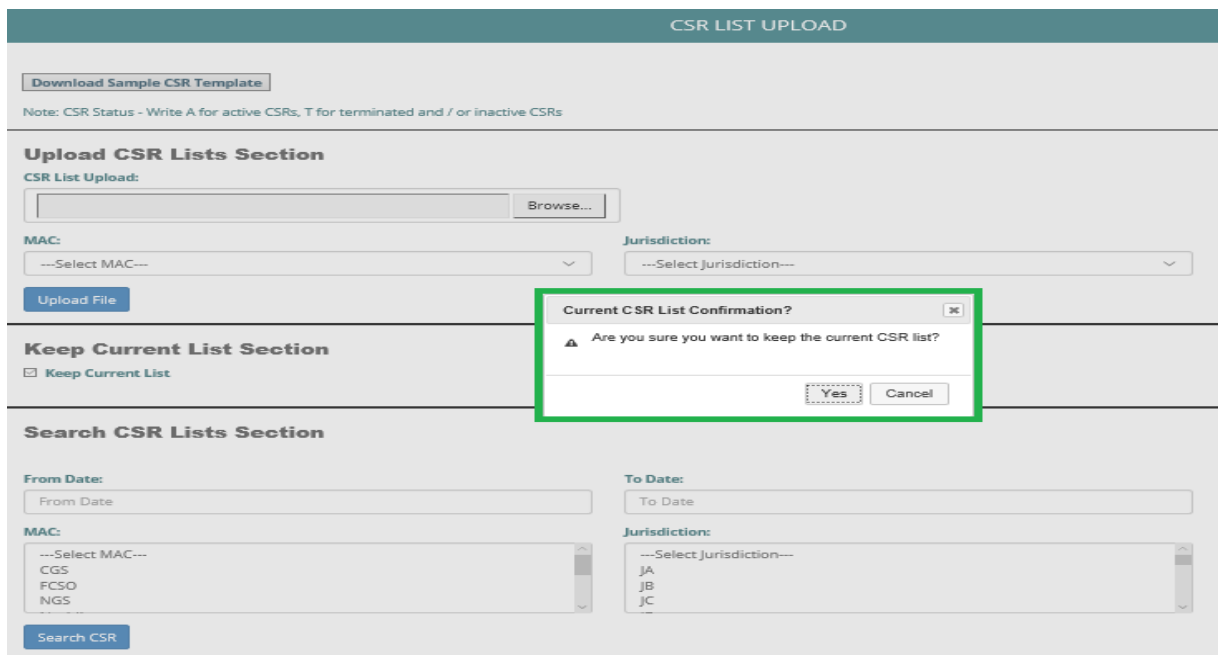


Figure 9: CSR List 2

- Select **Value** for the MAC.
- Select **Value** for the Jurisdiction.
- Select **Upload File** button.
- User can search CSR via these filters:
 - From Date
 - To Date
 - MAC
 - Jurisdiction
- User can click **Search CSR** button after entering all the values.
- CSR Monthly List is displayed, user will have to select **View** to display the list
- Select **Copy** button to copy the CSR List already uploaded
- Select **Excel** button to view and save in Excel format
- Select **PDF** button to view and save in PDF format

CSR LIST UPLOAD

[Download Sample CSR Template](#)

Note: CSR Status - Write A for active CSRs, T for terminated and / or inactive CSRs

Upload CSR Lists Section

CSR List Upload:

C:\Users\Olanrewaju\OneDrive - Arch Systems\Document Browse...

MAC:

FCSO

Jurisdiction:

JN

Upload File

Keep Current List Section

☐ Keep Current List

Search CSR Lists Section

From Date:

From Date

To Date:

To Date

MAC:

---Select MAC---
 CGS
 FCSO
 NGS

Jurisdiction:

---Select Jurisdiction---
 JA
 JB
 JC

Search CSR

Figure 10: CSR List 3

- Forms Upload menu option also allows Users to
 - Download the “Sample QAM Environmental Change Control Form” to upload in the CRAD.
 - Upload new QAM Environmental Change Control Form is done by clicking the browse button and select the already downloaded form from the computer.
 - Select Form type, (No Planned Changes, Adverse Event or Emergency Change)
 - Select MAC, Jurisdiction and upload file.


 CMS and MAC Monthly QAM Environment Change Control Form	
MAC Name:	
Date Submitted to CMS:	
Submitted By:	
Type (eg. Servers, H/W, S/W, Security, OS, Firmware, etc.)	Vendor / Application
Additional Comments:	

Figure 11: Environmental Change Control Form Template

QAM ENVIRONMENT CHANGE CONTROL FORM

[Download Sample QAM Environmental Change Control Form](#)

Upload QAM Environmental Change Control Form Section

QAM Environmental Change Control Form Upload:

C:\Users\OlanrewajuOlafisoye\Desktop\QAM_ENVIRONMEN Browse...

Form Type:

☐ No Planned Changes
 ☐ Adverse Event
 ☐ Emergency Change

MAC: Noridian

Jurisdiction: IF

Upload File

Search QAM Environmental Change Control Form

From Date:

From Date

To Date:

To Date

MAC:

---Select MAC---
 Select ALL
 CGS
 FCSO

Jurisdiction:

---Select Jurisdiction---
 Select ALL
 JA
 JB

Search

QAM Environment Monthly List:

Figure 12: Environmental Change Control Form

- User can Search QAM Environmental Change Control Form via these filters:
 - From Date
 - To Date
 - MAC
 - Jurisdiction
- User can click **Search** button after entering all the values.

4.5 Rebuttal List

- List of Rebuttals -
 - Select **Values** from the MAC field.
 - Jurisdiction(s) displayed are based on the MAC already selected.
 - Select **From Date** and **To Date**.
 - Click **Filter** to search the list of Rebuttals.
 - Click **Reset** to clear all fields.
 - Click **Add Rebuttals** to add new Rebuttal.
- The Rebuttal page shows the list of Rebuttals that has been generated. Rebuttal List columns displays:
 - MAC
 - MAC Call Reference ID
 - QM Name/ID
 - PCC / Location: The CRAD shall display the PCC Name identified when Rebuttal created
 - Date Posted: The CRAD shall display the Timestamp for when the Rebuttal was saved to the CRAD
 - Response Time: Business days elapsed between Date Posted and most current update to Rebuttal.
 - Reporting Month (Monitoring Period for Failed Scorecard)
 - Status: The CRAD shall display the status of the Rebuttal as follows:
 - Pending
 - Completed
 - Result: The CRAD shall display the current result of the Rebuttal as follows:
 - Pending
 - Scoring Modified
 - Scoring Unchanged
 - CMS Elevated
 - Actions
 - View
 - Edit
 - Select **Copy** button to copy and paste the current displayed page.
 - Select **Excel** button to view and save in Excel format.

- Select **PDF** button to view and save in PDF format.

MAC	MAC Call Reference ID	QM Name/ID	PCC/Location	Date Posted	Reporting Month	Status	Result	Actions
CGS	J15VANNENSON20180125_01919	mobeena	Des Moines		01/25/2018	Completed	CMS Elevated	
CGS	J15KCBLE20180123_0815 00 AM	mobeena	Nashville	1517231638000	01/23/2018	Completed	Scoring Modified	
CGS	J15BOALFORD20180123_02 20 19 PM	mobeena	Columbia	1517326238000	01/23/2018	Pending		
CGS	J15AARESTAD20180101_010000	mobeena	Nashville	1517343739000	01/01/2018	Pending		
CGS	J15TDALRY20180105_110749	mobeena	Columbia	1517344887000	01/05/2018	Pending		
CGS	J15ADALSA20180102_131013	mobeena		1517374450000	01/02/2018	Pending		
CGS	J15ADALSA20180102_131013	mobeena	Des Moines		01/02/2018	Completed	Scoring Modified	
CGS	J15ADALSA20180102_131013	mobeena	Nashville	1518566009000	01/02/2018	Pending		
CGS	J15CABAT20180108_081516	mobeena	Nashville	1518568186000	01/08/2018	Pending		
CGS	J15TDALRY20180105_110749	mobeena		1518570467000	01/05/2018	Pending		

Figure 13: List of Rebuttals

- Select **Add Rebuttal** to add new Rebuttal
 - Select MAC Call Reference ID and the following fields will be populated
 - CSR Full Name
 - Call Time
 - Call Monitoring Date
 - Call Category
 - LOB
 - QM Name/ID
 - Select PCC/Location
 - Select PCC Contact Person
- Select the **Attachments** checkbox to verify that PHI/PII information is not included in the attachment before uploading.
- To upload a document to the Rebuttal form, click the Browse button and it will take User to the actual location where documents are saved. From here, select the folder that contains the attachment to be uploaded.
- Select **Save** button to save what has been inputted and select **Close** button to close the Page.
- When the Rebuttal is created and saved, the system takes user to List of Rebuttals page. See Figure:13.

SAVE/UPDATE REBUTTAL

Save Close

MAC Call Reference ID:* JNHAARSV20180305_130000

CSR Full Name: HEATHER JANE AARSVOLD

Call Time: 01:00:00 PM

Call Monitoring Date: 03/05/2018

Call Category: Provider Enrollment

LOB: Appeals/Reopenings

QM Name/ID: QUALITYMONITOR1

PCC/Location:* Jacksonville

PCC Contact Person:* user0309 mac

Failure Reason/s

Customer Skills Call Failure Reason: Inappropriately interrupting the caller

Reason for Rebuttals/QM Comments:* Testing 001

Attachments: ☒ I Agree that PHI/PII information is not included in the attachment.

C:\Users\Olanrewaju.Olafisoye\Documents\CSR List\NORIDIAN.xlsx Browse

Note: Please don't include PHI/PII information in the attachment

Save Close

Figure 14: Save/Update Rebuttal

4.6 User Management

- When a User clicks on User Management button, it shows a dropdown that displays
 - Create Users
 - List of Users
 - MAC Assignment
 - MAC List
 - Jurisdiction List
 - Program List
 - Location List
 - MAC Mapping

4.6.1 Create Users

4.6.1.1 To create new User, click **Create Users** and fill the following fields

4.6.1.1.1 Username / Email Address

4.6.1.1.2 Password

4.6.1.1.3 Confirm your password

4.6.1.1.4 First Name

4.6.1.1.5 Middle Name

4.6.1.1.6 Last Name

4.6.1.1.7 Organization

4.6.1.1.8 Role

4.6.1.2 If MAC is selected as an Organization, additional fields will be required.

4.6.1.2.1MAC

4.6.1.2.2Jurisdiction

4.6.1.2.3PCC/ Location

4.6.1.3 Select **Create** to create user4.6.1.4 Select **Close** to close the page

CREATE USER

Username / Email Address:*
Testoo1

Password:*
.....

Confirm your password:*
.....

First Name:*
Test

Middle Name:
Tester

Last Name:*
Testing

Organization:*
Arch Systems LLC

Role:*
Quality Manager

Create Close

Figure 15: Create User

4.6.2 List of Users

4.6.1.5 The CRAD updates the List of Users when new Users are entered/created.

4.6.1.6 View Users by clicking on List of Users button.

4.6.1.7 Search for a specific User by the Last Name or Role or Organization.

4.6.1.8 Click **Search** to get the list of users.4.6.1.9 Click **Add User**, to create User.4.6.1.10 Double click **Active or Inactive** under User Access to make a user 'Inactive' or 'Active'.

List of Users

Last Name: Role: Organization:

Show entries Search:

User Id	FirstName	MiddleName	LastName	Organization	Role	User Access
1	CMSron		Administrator	Arch Systems LLC	Quality Manager	Inactive
2	Arch	Diane	Qaulty Manager	Arch Systems LLC	CMS User	Active
21	John	mc	Doe1	Arch Systems LLC	Administrator	Inactive
23	Test	Middle	User	CMS	MAC Admin	Active
24	Mobeena		Mohammed	Arch Systems LLC	Administrator	Active
26	Liam	Mario	Zanoni	Arch Systems LLC	Administrator	Active
27	firstname			MAC	MAC User	Active
28	CMSADMIN		ADMINISTRATOR	CMS	Quality Monitor	Active
29	CMSUSE		USER	CMS	CMS User	Active
30	ARCHADMIN		ADMINISTRATOR	Arch Systems LLC	Administrator	Active

Showing 1 to 10 of 23 entries

Figure 16: List of Users

4.6.3 MAC Assignment

- 4.6.3.1 This displays the List of MAC Assignment Screen by month.
- 4.6.3.2 User can select **"Add MAC Assignment For Month"** to add new MAC Assignment.
- 4.6.3.3 User can also click **View** or **Edit** button to view or to add new MAC Assignment
- 4.6.3.4 MAC Assignment screen is displayed for User to add assigned calls to the Quality Monitors
- 4.6.3.5 Select Copy button to copy and paste the current displayed page.
- 4.6.3.6 Select **Excel** button to view and save in Excel format.
- 4.6.3.7 Select **PDF** button to view and save in PDF format.
- 4.6.3.8 Select **Save & Continue** button to save
- 4.6.3.9 Select **Close** to exit.

4.6.4 MAC List

- 4.6.4.1 This screen displays the list of MACs
- 4.6.4.2 Click **Add MAC** to add new MAC and fill the following fields
 - 4.6.4.2.1 MAC Name
 - 4.6.4.2.2 Description
 - 4.6.4.2.3 Start Date
 - 4.6.4.2.4 End Date
- 4.6.4.3 Select **Save** to save the new MAC or select **Close** to exit saving.
- 4.6.4.4 Search MAC by using the search box
- 4.6.4.5 Click **Edit** to edit MAC

- 4.6.4.6 User can navigate to pages by clicking **Next** and Click Previous to return to the last page
- 4.6.4.7 Select Copy button to copy and paste the current displayed page.
- 4.6.4.8 Select **Excel** button to view and save in Excel format.
- 4.6.4.9 Select **PDF** button to view and save in PDF format.

MAC ASSIGNMENT SCREEN

MAC Assignment for: 06_2018

Showing 1 to 66 of 66 entries Search:

MAC	Jurisdiction	Program	Planned	Created	Assigned Calls		
					Rifkin, Cindy	Rivera, Lydia	Galtin, Janeene
CGS	J8	DME	20	Auto	<input type="text" value="9"/>	<input type="text" value="9"/>	<input type="text" value="9"/>
CGS	JC	DME	20	Auto	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
CGS	J15	ABMAC-A	20	Auto	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
WPS	J5	ABMAC-B	20	Auto	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
WPS	J8	ABMAC-A	20	Auto	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
WPS	J8	ABMAC-B	20	Auto	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Figure 17. MAC Assignment Screen

4.6.5 Jurisdiction List

- 4.6.5.1 This screen displays the lists of Jurisdictions
- 4.6.5.2 Click **Add Jurisdictions** to add new Jurisdictions and fill the following fields
 - 4.6.5.2.1 Jurisdiction Name
 - 4.6.5.2.2 Description
- 4.6.5.3 Select **Save** to save the new Jurisdiction or select **Close** to exit saving.
- 4.6.5.4 Search Jurisdiction by using the search box
- 4.6.5.5 Click **Edit** to edit Jurisdiction
- 4.6.5.6 User can navigate to pages by clicking **Next** and Click **Previous** to return to the last page
- 4.6.5.7 Select Copy button to copy and paste the current displayed page.
- 4.6.5.8 Select **Excel** button to view and save in Excel format.
- 4.6.5.9 Select **PDF** button to view and save in PDF format.

4.6.6 Program List

- 4.6.6.1 This screen displays the lists of Programs
- 4.6.6.2 Click **Add Program** to add new Program and fill the following fields
 - 4.6.6.2.1 Program Name
 - 4.6.6.2.2 Description
- 4.6.6.3 Select **Save** to save the new Program or select **Close** to exit saving.
- 4.6.6.4 Search Program by using the search box
- 4.6.6.5 Click **Edit** to edit Program
- 4.6.6.6 User can navigate to pages by clicking **Next** and Click **Previous** to return to the last page
- 4.6.6.7 Select Copy button to copy and paste the current displayed page.
- 4.6.6.8 Select **Excel** button to view and save in Excel format.

4.6.6.9 Select **PDF** button to view and save in PDF format.

4.6.7 Location List

4.6.7.1 This screen displays the lists of PCC/Locations

4.6.7.2 Click **Add Location** to add new Location and fill the following fields

4.6.7.2.1 Location Name

4.6.7.2.2 Description

4.6.7.3 Select **Save** to save the new Location or select **Close** to exit saving.

4.6.7.4 Search Location by using the search box

4.6.7.5 Click **Edit** to edit Location

4.6.7.6 User can navigate to pages by clicking **Next** and Click **Previous** to return to the last page

4.6.7.7 Select Copy button to copy and paste the current displayed page.

4.6.7.8 Select **Excel** button to view and save in Excel format.

4.6.7.9 Select **PDF** button to view and save in PDF format.

4.6.8 MAC Mapping

4.6.8.1 This screen displays the lists of MAC Mappings

4.6.8.2 Click **Add New MAC Mapping** to add new MAC Mapping and fill the following fields

4.6.8.2.1 MAC

4.6.8.2.2 Jurisdiction

4.6.8.2.3 Program

4.6.8.2.4 PCC/Location

4.6.8.3 Select **Save** to save the new MAC Mapping or select **Close** to exit saving.

4.6.8.4 Search MAC Mapping by using the search box

4.6.8.5 Click **Edit** to edit MAC Mapping

4.6.8.6 User can navigate to pages by clicking **Next** and Click **Previous** to return to the last page

4.6.8.7 Select Copy button to copy and paste the current displayed page.

4.6.8.8 Select **Excel** button to view and save in Excel format.

4.6.8.9 Select **PDF** button to view and save in PDF format.

4.7 My Account

This page shows the user's account information in the following order

- User name / Email Address
- Change Password
- First Name
- Middle Name
- Last Name
- Organization
- Role
- MAC

- Jurisdiction
- PCC/Location

The screenshot displays a web form titled "MY ACCOUNT" with a teal header. The form contains the following fields and controls:

- Username/Email Address:** A text input field containing "mobeena" and a blue "Change Password" button.
- First Name:** A text input field containing "Mobeena".
- Middle Name:** An empty text input field.
- Last Name:** A text input field containing "Mohammed".
- Organization:** A dropdown menu with "Arch Systems LLC" selected.
- Role:** A dropdown menu with "Administrator" selected.
- MAC:** A dropdown menu with "CGS" selected.
- Jurisdiction:** A dropdown menu with "--Select Jurisdiction--" selected.
- PCC Location:** A dropdown menu with "--Select PCC Location--" selected.

Figure 18: My Account

4.8 Support

All inquiries should be forwarded to supportqam@archsystemsinc.com. A response will be sent within 1 to 2 business days.

Appendix A: Acronyms

Table 2: Acronyms

Acronym	Literal Translation	Definition
CMS	Centers for Medicare and Medicaid Services	CMS is a Federal agency within the United States Department of Health and Human Services that administers the Medicare program and works in partnership with state governments to administer Medicaid, the State Children's Health Insurance Program, and health insurance portability standards.
CSR	Customer Service Representative	Interact with customers to handle complaints, process orders, and provide information about an organization's products and services.
IMD	Internal Medical Data	It's a platform used by the CSR to obtain the answer at the MAC.
LOB	Line of Business	A general term which refers to a product or a set of related products that serve a particular customer transaction or business need.
MAC	Medicare Administrative Contractor	A Medicare Administrative Contractor (MAC) is a private health care insurer that has been awarded a geographic jurisdiction to process Medicare Part A and Part B (A/B) medical claims or Durable Medical Equipment (DME) claims for Medicare Fee-For-Service (FFS) beneficiaries. CMS relies on a network of MACs to serve as the primary operational contact between the Medicare FFS program and the health care providers enrolled in the program. MACs are multi-state, regional contractors responsible for administering both Medicare Part A and Medicare Part B claims.
PCC	Provider Contact Center	It's a call center that allows providers to obtain beneficiary, medical benefits, claims etc. information.
PDF	Portable Document Format	A file format used to represent documents in a manner independent of application software, hardware, and operating system.

Approvals

The undersigned acknowledge that they have reviewed this document and agree with the information presented within. Changes to this document will be coordinated with, and approved by, the undersigned, or their designated representatives.

Signature: Yolanda Harris Date: 07/30/2018
Print Name: Yolanda Harris
Title: Program Manager
Role: Arch Systems Approving Authority

Signature: Kimberly Anthony Date: 7/30/2018
Print Name: Kimberly Anthony
Title: COR
Role: CMS Approving Authority