

NCE Documentation Validation 123FB

PAGE 1



Patient ID*

3640820

CCS Customer Service Representative Email Address*

patty.volpe@ccsmed.com

Call Type*

Inbound

Call Reason*

Documentation Validation

Submitting To*

Patty

Insurance*

☐ Medicare/ Medicare Replacement

☐ Commercial

☐ Medicaid/ Medicaid Replacement

Go To*

☐ Pump Only

☐ CGM Only

☐ Pump and CGM

Separate the insurances into 5 different tabs

Next Page

CGM/Medicare & Medicare Advantage Notes Template

Patients' primary insurance:

Is this correct?

Product Requested:

Is this correct?

Is this a full system or supplies only?

☐ New system

☐ Supplies only

Is this:

☐ Initial Documentation Request

☐ Documentation Follow up

If Documentation Follow up:

What attempt is this?

Drop down counter 1-5

Is this a Parachute Order?

☐ Yes – Parachute Order

☐ No – Not Parachute

What documentation does the insurance checklist show is required for this order? (Select all that apply)

☐ PWO

☐ F2F/Clinical Notes

☐ Test Logs

☐ Labs

☐ Other Insurance Specific documentation

Freetype

Is Pre-authorization required for this order?

- ☐ Yes – Pre-Authorization is required.
- ☐ No – Pre-Authorization is not required.

Is there valid consent?

- ☐ Have Consent
- ☐ Need Consent

For Have Consent:

Date taken:

Expires:

PIMS Note Example:

Medicare – Dexcom G7 – New System –
Documentation Follow Up - Attempt #3 –
Parachute Order

Insurance Requires: PWO/F2F-Clinical Notes

1. Have Consent – date taken 03/03/2024
and expires 04/02/2024

Page 3 –

PWO –

Has a new/corrected PWO been scanned in?

Yes

No

If No,

Need PWO

If yes,

Has the PWO been validated, and processing notes are in PIMS?

Yes

No

If yes,

Have PWO

Copy Processing Notes Here:

If No,

Let's validate the PWO

PIMS Note Example:

Medicare – Dexcom G7 – New System –
Documentation Follow Up - Attempt #3 –
Parachute Order

Insurance Requires: PWO/F2F-Clinical Notes

1. Have Consent – date taken 03/03/2024
and expires 04/02/2024
2. Have PWO – Processing Note

Did the HCP use the Enhanced PWO?

☒ Yes – Enhanced PWO

☐ No

If yes:

Does the patient use insulin

☒ Yes PWO states Patient using insulin

☐ No

No – Requested PWO

Does the patient have hypoglycemic events

- ☒ Yes – the patient has hypoglycemic episodes
- ☐ No – Patient does not qualify – advised patient and cancelled workflow.

If No,

Does the PWO match the requirements needed for a valid PWO?

Yes – Have PWO Go to processing Notes

- ☒ Patient is new to CGM”
- ☐ Patient is on CGM therapy

Where is PWO Scanned?

What date was the PWO scanned into PIMS?

The PWO is for what Brand?

What Model is listed?

What is the start date of the PWO?

What is the Diagnosis code?

Are site change instructions “per manufacturer’s directions”?

- ☒ Yes – PWO states site change instructions are ‘per manufacturer’s instructions.
- ☐ No – PWO does not state that site change instructions are ‘per manufactures instructions. PWO is not valid.

Who is the treating Doctor that signed the PWO?

What is the date the PWO was signed?

Is the PWO valid?

Yes – Have PWO – Processing Notes

No – Need Corrected PWO

Face 2 Face

Do you have valid Face2Face Records?

Yes "Have F2F"

No "Need F2F"

If yes,

Where is the F2F scanned?

What date was is scanned into PIMS?

What is the visit date on the F2F?

What is the diagnosis code?

Is the patient using insulin?

Does the patient use insulin

☒ Yes F2F states Patient using insulin

If yes, on page(s)

☐ No

If No

Does the patient have hypoglycemic events

☒ Yes – the patient has hypoglycemic episodes

if yes, If yes, on page(s)

☒ No - Patient does not qualify – advised patient and cancelled workflow

PIMS Note Example:

Medicare – Dexcom G7 – New System –
Documentation Follow Up - Attempt #3 –
Parachute Order

Insurance Requires: PWO/F2F-Clinical Notes

1. Have Consent – date taken 03/03/2024
and expires 04/02/2024
2. Have PWO – Processing Note
3. Have F2F – Processing Note

Or



F2F is electronically signed

By:

On Page:

☐ Attestation Scanned:

CLINICAL NOTES

Are there new Clinical Notes Scanned for this order?

Yes

No

Where are the clinical notes scanned?

What date was scanned into PIMS?

What is the visit date on the clinical notes?

What is the diagnosis code?

Is the patient using insulin?

Does the patient use insulin

☐ Yes Clinical Notes states Patient using insulin

If yes, on page(s)

☐ No

If No

Does the patient have hypoglycemic events

☐ Yes – the patient has hypoglycemic episodes

if yes, If yes, on page(s)

☐ No - Patient does not qualify – advised patient and cancelled workflow

☐ Clinical Notes are electronically signed

By:

On Page:

☐ Attestation Scanned: 

Is the verification note less than 30 days old?

Yes – Verification is valid

No – Requested Verification

Is the Order Created?

Yes

No

If Yes, is Ss correct and match the order?

Yes –

Are there any special handling notes under the documentation tab?

Yes

No

Does this order require pre-authorization?

Yes

No

Is this order ready for packet approval?

Yes

No

Action Taken: (Select all that apply)

- ☐ Sent request to HCP new PWO
- ☐ Sent request to HCP corrected PWO
- ☐ Sent request to HCP for F2F/Clinical Notes
- ☐ Called HCP to discuss documentation needs

● Called Patient to provide status update

PIMS Note Example:

Medicare – Dexcom G7 – New System – Documentation Follow Up - Attempt #3 – Parachute Order

Insurance Requires: PWO/F2F-Clinical Notes

1. Have Consent – date taken 03/03/2024 and expires 04/02/2024
 2. Have PWO
 3. Have F2F
- Or
4. Have Clinical Notes – Processing Notes
 5. Need Packet approval

Actions Taken: Confirmed verification is less than 30 days old, SS and order match, Order has been created.

Submitted to packet approval

Called patient for status update

Processing Notes:

PWO Processing Note: PWO scanned under PWO-CGMS. (00/00/0000) – PWO for (BRAND) (PRODUCT), supplies: Start (00/00/0000), E00.00, site change: per manufacturer directions, treating HCP (Name) signed (Date)

F2F/Clinical Note:

Office notes scanned under Clinical Notes (00/00/0000) for