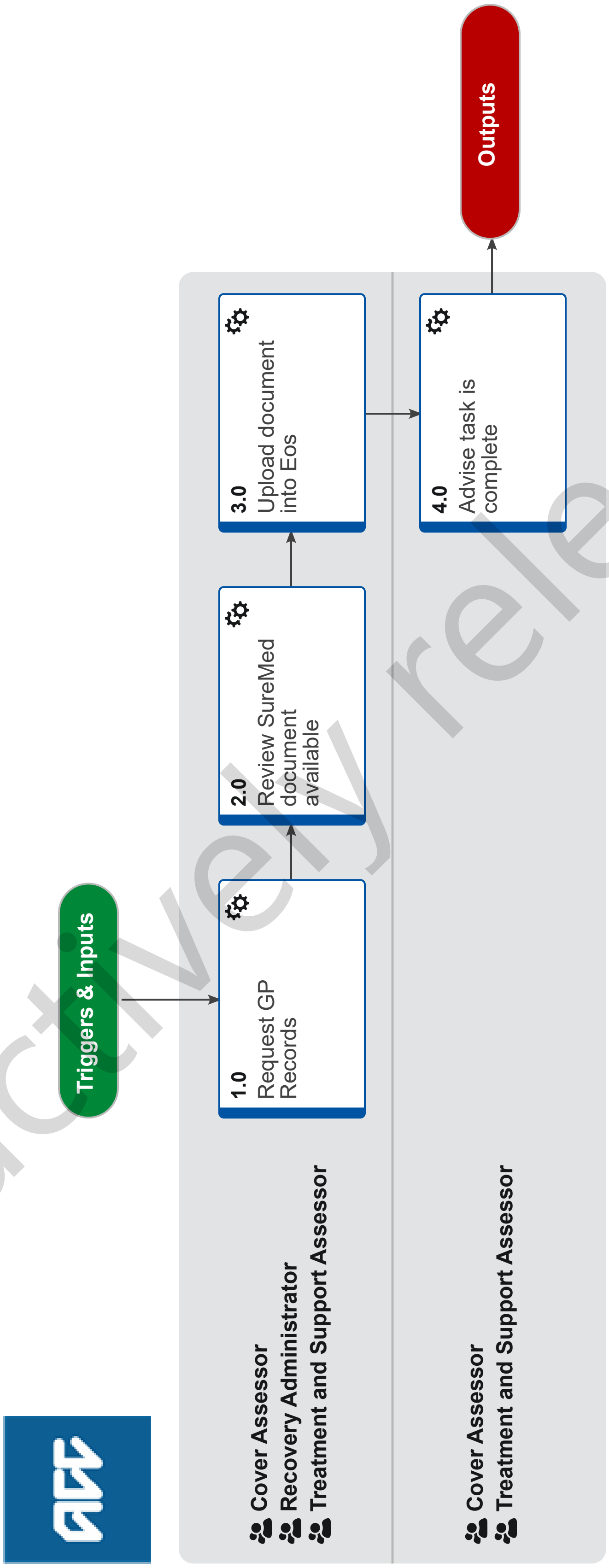
Request GP Clinical Records - SureMed v19.0



Request GP Clinical Records - SureMed v19.0

Summary

Objective
Request and Receive Clinical Records from SureMed.

Owner Name withheld

Expert Name withheld

Procedure

1.0 Request GP Records

Cover Assessor, Recovery Administrator, Treatment and Support Assessor

a Open the SureMed portal and enter all information to complete the request.

- SureMed User Guide
- Process change when raising an urgent task
- SureMed FAQs v 1.6
- SureMed Cheat Sheet

NOTE **What if there are questions to be included in the information request?**
SureMed is for requests without questions. Refer to the Request Clinical Records process (link below): Activity 3.0 (b)Create Purchase Order for requests with questions.
PROCESS Request Clinical Records

NOTE **What if the SureMed portal does not open?**
Ring the SureMed help line 0800 500 959, do not call IT Helpdesk.

NOTE **How do you know which Information Request to select within SureMed?**
Ensure you check what information you require before making a request. The 'Specific Piece of Information for a Claim (up to three pieces of information)' request is the most cost-effective for ACC and simplest for GPs, please ensure you select this request type if you only need specific claim information.

Specific Piece of Information for a Claim (Up to three pieces of information) = lodgement notes for establishing cover. You may specify up to three specific pieces of information for a single claim/injury e.g. A GP consultation note, MRI scan result, radiology report

Single body part / injury Request = medical notes to support incapacity and ongoing entitlements. Used to obtain detailed information on a single body part only (or condition when considering mental injury or treatment injury).

Specialised claims or multiple claims/injuries = Specialised claims, eg sensitive claims, mental injury, work related gradual process, treatment injury. Entitlements that need to be assessed against more than one claim, eg surgical intervention where the client has multiple claims related to requested surgical site. Used to obtain detailed information on up to three body parts (or conditions when considering mental injury or treatment injury).

NOTE **Ensure you enter the Doctors name on the demographics page of the request and include reference to the ACC45 numbers for all claims referred to in the request. If you have not been provided a Doctors name in your task, go back to the Recovery Team Member, it is their responsibility to provider a GP name.**

NOTE **"Claims Product" box must be ticked when creating a request or the system will not allow you to proceed.**

NOTE **What if the doctor to request clinical notes from is not on the list?**
Select an alternative GP from the list to send the request to and SureMed will follow up from there. However, there are approx 20 medical practices that do require an accurate GP selection, these requests have a pop up notification. If this does pop up on your request then please call through to SureMed to have the GP added on 0800 500 959.
Alternatively, follow the process "Request Clinical Records" activity 3.0 Request GP records to manually request the clinical records.
PROCESS Request Clinical Records

NOTE **What is the time frame for incomplete information requests in SureMed?**
When you receive an incomplete information request task for a request originally made through SureMed we have one month from the date the notes were uploaded to SureMed by the GP to add an MIR task to the portal. For more information on creating the MIR task please see the information link above to the cheat sheet.
Your missing information task will mean SureMed create a new reference with the same number but the letter on the end is incremented, e.g if NZ123456a is the original request the MIR task would create NZ123456b (like it was cloned).

NOTE **What if there is a duplicate flag on SureMed?**
Follow the duplicate flag process and check if the request is a duplicate before continuing.

- Dupliate Flag Process

b Attach the SureMed consent form to each request.

- SureMed Consent form.pdf

NOTE **When should you use an ACC6300?**
If the request is for a Sensitive Claim or there is an ACC6300 already in EOS then attach this instead of the SureMed Consent form (above)

c In Eos, close the Requested Information task. This will automatically generate a Follow up Requested Information task for Recovery Administration. In the Follow Up Requested Information Eos task, note that clinical records have been requested via SureMed and include the reference number from the SureMed portal.

NOTE **Use the Follow Up Requested Information task for this**

With SureMed requests, Admin will no longer need to follow up with the provider as KonnectNet will do this on our behalf. The follow up tasks will remain open in EOS in the Recovery Administration EOS Department Queue. Follow Up tasks are to remain in the department queue at all times.

Should you be allocated one via Salesforce, you can log into SureMed and using the reference number provided in the follow up task, check the "Tasks & Notes" tab to confirm the status of the request and re-set the follow up task target date to one day after SureMed are due to follow up. If detailed notes have been made explaining why there are delays etc. it is useful to copy this into the follow up task so Recovery Team Members can see why there are delays with the notes being received back.

Follow up tasks are to remain open until medical notes have been uploaded to EOS by Inbound Document Management Administrators (IDM).

NOTE **What should you know about the tasks & notes within SureMed?**

• Tasks and Notes will display every interaction and update that SureMed have had from the medical practice. SureMed should follow up with the practice every five working days and leave a message.
• Check tasks and notes by selecting + symbol on the left hand side of the request or by clicking on the clients name and then selecting the tasks & Notes tab.
• This tab will inform you on reasons for delays or anything else going on with the request.
• SureMed will also send you a task if you have requested from the incorrect practice or if there are any other issues that need to be actioned or acknowledged (it is the responsibility of the initial requestor to action these tasks).
— This will appear as an email notification but can also be viewed through the 'Manage' drop down box and then 'Tasks'.
• Once actioned or acknowledged, select complete task and it will disappear.
• Also use this section when creating tasks for SureMed in regards to urgent requests etc.

NOTE **How to clone a request**

If you have been notified by KonnectNet that there is information that needs changing (e.g client name spelt differently, incorrect GP etc).

1. Search for the client using the SureMed reference number.
2. Click on the ACTIONS button on the far right hand side of the screen. A drop down menu will appear
3. Select Clone
4. Make the required changes on the Demographics tab. All information entered from your original request will have copied over to the clone request, you do not need to re-enter what is being requested or re-upload the consent form.
5. Once corrections have been made, submit the request as usual and make sure to note the new reference number in the EOS Follow up task.

NOTE **What if you receive a task notification advising the client is not registered at that medical practice?**

If you receive a task notification from KonnectNet that has advised the client is not registered at the medical practice, make a note of this and any information provided on the NGCM – Information Not Received task which generates once you close the NGCM – Follow up Requested Information task. If your task is for a Treatment Injury claim you will not be able to add a note to the NGCM - Information Not Received task, in this instance you should contact the Specialist Cover Assessor or the task creator of the initial Requested Information task.

NOTE **What if the notes have been received on SureMed, but they have not been uploaded to EOS?**

Admin are to push the follow up task out to allow time for Inbound Document Management Administrators (IDM) to upload the notes.

Push the follow up task out for 3 days as IDM usually have a 48 hour turn around for uploading medical notes. If the notes still haven't been uploaded after 3 days, contact the IDM team member who accessed the medical notes on the SureMed Portal to follow up. If we do not upload the notes within 14 days of them being accessed, SureMed's Data Retention Policy will delete the notes and we will have to request the information again.

NOTE **Do not close the follow up task if the medical notes have not been received.**

Follow up tasks are to remain open until medical notes have been uploaded to EOS by Inbound Document Management Administrators (IDM). The only exception to this is if the request is declined or cancelled.

2.0 Review SureMed document available

Cover Assessor, Recovery Administrator, Treatment and Support Assessor

a Open the email from SureMed and click on the link to the document.

b Review the document to ensure it contains information for the correct client (3 point check).

NOTE **What if the Recovery Team Member advises the document needs redaction?**

If information needs to be redacted, the request should come to Recovery Admin via email, with clear instructions on which information needs to be redacted.

If redactions are less than 5 pages, Admin can complete redactions as per usual process, but still enter an FYI “To Do” note in the KonnectNet portal advising them information had to be re-dacted.

If redactions are more than 5 pages, advise SureMed that the Medical Centre needs to redact the documents and only send the information that was requested.
1) Whilst navigating a current request, under the ‘Tasks & Notes’ section select ‘Create a new Task/Note’.
2) On the box that appears select ‘Task for Konnect NET’ on the left box and ‘Request’ on the right
box.
3) Write in the bottom box what you would like redacted. Eg “Please have the practice redact all information unrelated to the clients right shoulder” and click submit.
4) Create an Admin Request task stating the Medical Centre's name and the original SureMed reference number and note ‘Awaiting Redaction’. Push task out for 5 days and reply to the redaction email advising we have notified KonnectNet and have created an Admin task to follow
up on.

NOTE **What if information is missing?**

1) Create a task on SureMed informing what notes are missing. While in the request you are missing information for, navigate to the ‘Tasks & Notes’ tab -> ‘Create a new Task/Note.
2) In the left box select ‘Insurer Requested MIR’, the right box will autofill.
3) In the bottom box write clearly what information was missing that you still require. Eg “Missing notes from a consult dated 04/01/2014”.
When the missing notes are received, you will be notified as normal.

NOTE **What if there isn't an email to review?**

An alternative way of viewing your, or any team members documents is through the vault. Click on Reports -> Unread Vault Items. Once downloaded the notes will leave the ‘Unread Vault Items’.

3.0 Upload document into Eos

Cover Assessor, Recovery Administrator, Treatment and Support Assessor

a Save the document onto your Desktop.

b In Eos, go to ‘Documents’ tab – click ‘Add’ button on the right side > ‘Upload Document’ > Document Type: IB-Medical Reports/Notes

c Type in the document name based on ACC naming crtieria in the ‘Comments’ and Description’ section.

NOTE **What is ACCs naming criteria for clinical records received by GPs?**

Type of Note. Date Range. Vendor ie: GP Notes. 12/11/2019 – 4/01/2020. Greytown Medical Centre

NOTE **What if you are a Recovery Administrator?**

1) Following the task assignment in Salesforce, navigate to Eos and select 'Do Task' from your task queue.
Perform privacy checks on the medical notes that have been uploaded by IDM.
2) Select the 'Information Requested' tab on the Recovery Plan subcase, mark the request as 'Complete' and state 'Information Received', select OK.
3) Close the 'NGCM - Follow up Requested Information' task stating clinical records have been received. A NGCM - Review Requested Information task will be auto generated and assigned to the Recovery Team or Individual managing the claim.

- NG SUPPORTING INFORMATION Inbound and Outbound Document Checks
- Privacy Check Before Disclosing Information Policy
- NGCM Filing Away - System Steps

4.0 Advise task is complete

Cover Assessor, Treatment and Support Assessor

a In Eos, update the task to acknowledge that notes have been received and continue with your assessment.

NOTE **What happens to the notes after they are downloaded?**

After notes have been opened or downloaded once, they will disappear from the ‘Unread Vault Items’ on SureMed but will still remain viewable for 14 days in your SureMed requests.
To view them look under Manage > SureMed Requests in the menu system.

If the notes have not been opened or downloaded, after 60 days they will be deleted as per Suremed's Net's policy.