

POLICY AND PROCEDURE

DEPARTMENT: <u>Population Health Clinical Outcomes</u> Medical Management	DOCUMENT NAME: TruCare® Standards for Documentation
PAGE: 1 of 5	REPLACES DOCUMENT:
APPROVED DATE: 11/25/13	RETIRED:
EFFECTIVE DATE: 07/25/11, 2/1/15	REVIEWED/REVISED: 11/13; 6/14; 11/14, 9/15, 8/16, 8/18, 7/19, 5/20, <u>32/21</u>
PRODUCT TYPE: All	REFERENCE NUMBER LA.UM.06.04

SCOPE:

Louisiana Healthcare Connections Plan Population Health Clinical Outcomes~~Medical Management~~ Department

PURPOSE:

To describe the documentation standards in the TruCare® ~~Medical Management~~Population Health Clinical Outcomes -documentation system in order for the system to provide the authorization number and effective dates for authorization to participating providers and applicable non-participating providers; as well as, to electronically store and report all service authorization requests, including the time and date received, decisions made by the Plan regarding the service requests, clinical data to support the decision, and time frames for notification of providers and members of decisions. (Emergency Contract 8.4.2.5 & 8.4.2.6)

POLICY:

It is the policy of the ~~Medical Management~~Population Health Clinical Outcomes -department that the required clinical documentation standards will be upheld in the TruCare® clinical documentation system, as outlined within this policy and procedure.

PROCEDURE:

The Population Health Clinical Outcomes~~Training~~ department will utilize the Corporate TruCare® User Guides that will be reviewed and updated as needed by the Corporate ~~Medical Management~~Population Health Clinical Outcomes Department, to reflect and detail the sections which house the necessary documentation for Utilization Management (UM) and Case Management (CM) activities. The TruCare® User Guides are the primary source for system defined usage, and all staff working in the system need to frequently reference the user guides to ensure the clinical quality and documentation standards are adhered to across the continuum of UM and CM activities. The ~~Medical Management~~Population Health Clinical Outcomes -departments are responsible for maintaining accurate clinical documentation on member centered UM and CM activities.

Consistent, current and complete documentation in the medical record is an essential component of quality member care. All member documentation will be

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entered in the clinical documentation system at the time of service delivery (e.g. same business day). Medical records must be maintained in an organized medical record-keeping system in compliance with Plan medical documentation and record-keeping practice standards.

The following clinical documentation tools within the TruCare® **Medical Management**Population Health Clinical Outcomes system will be utilized during UM and CM work processes.

1. TruCare® Menu Bar Dashboard

- My Dashboard
 - My Tasks
 - Group Queues
 - CM Case Load
- Members
 - My List
 - Search
- Tasks
 - My Tasks
 - **My**-Groups Queues
 - Personal Queues
- Providers
 - Provider Search
- Authorizations
 - Authorization Search
- Resources
 - Launch Pad
 - InterQual Book View
- ~~Today's Tasks and Task Reminders~~
- ~~Case Load Summary~~

2. Member Dashboard/Main Menu

- Member Information
 - 2. Information
 - Member Summary
 - Demographics
 - Eligibility & Benefits Summary

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- Contacts **Summary**
- 3. Clinical
 - Medications **Summary**
 - Diagnosis **Summary**
 - Allergies
 - **Birth Events**
 - Key Metrics **Summary**
 - Birth Event **Summary**
 - Key Metric **Summary**
- 4. Care Management
 - Referrals **Summary**
 - Assessments **Summary**
 - Care Plans **Summary**
 - Cases **Summary**
 - _____
- Authorizations
 - 6. ○ Authorizations
 - Authorization **Summary**
 - Inpatient Authorizations
 - Appeal **Summary**
 - Service / Procedure Authorizations
 - Appeal **Summary**
- 14. Documentation
 - Notes **Summary / Create Note / Edit Note / Comments / Void Note**
 - Correspondence **Summary**
 - Documents **Summary**
- 15. Member Tasks (within the member)
 - MemberAll **Tasks**
 - Add **Tasks**

REFERENCES:

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Corporate TruCare® User Guides:-

<https://enet.centene.com/sites/MedicalManagementOperations1/Training%20Manuals/Forms/AllItems.aspx?RootFolder=/sites/MedicalManagementOperations1/Training%20Manuals/TruCare%208.0%20User%20Guides&FolderCTID=0x0120005565AA85ED149A4E82F9EDBC2B66B31F&View=%7b7F405BCD-63CC-4F8F-8CF8-4B751E5479A6%7d>
<https://enet.centene.com/sites/MedicalManagementOperations1/MedicalManagementTrainingResources/SitePages/Home.aspx?RootFolder=%2Fsites%2FMedicalManagementOperations1%2FMedicalManagementTrainingResources%2FShared%20Documents%2FTruCare%2FTruCare%20Training%20Manual&FolderCTID=0x012000546264472962D946B6A96BD38A54AE51&View=%7B54A71116%2D41C9%2D4E05%2DB1F1%2DD178D88E876A%7D>

LA.UM.01 - Utilization Management Program Description
 LA.UM.06 - Clinical Information and Documentation
 LA.UM.06.02 - UM Documentation in TruCare® Notes
 Current NCQA Health Plan Standards and Guidelines

ATTACHMENTS:

DEFINITIONS:

REVISION LOG

REVISION	DATE
Annual Review; updated reference to NCQA 2012 Standards & Guidelines.	7/25/12
Inserted 2 nd paragraph in Procedure section to include documentation standards; inserted attachment-Acceptable Abbreviation List.	10/16/12
Annual Review; updated “TruCare® Dashboard” to reflect current items; Added “2. Member Information”; Removed “Quality Incident Summary from “Clinical Module”; Updated names under “7. Tasks” and also changed order; Updated names under “4. Care Management” and changed order; Added items under “5. Authorizations”; Updated “6. Care Management” items; Deleted “7. Appeals”, but added under “5 Authorizations”; Added “8. Scheduler”; Updated NCQA to reflect current year of 2013; Deleted reference to URAC under References section; Updated “InterQual – McKesson Corporation” to reflect 2013	09/06/13
Added language to meet with Louisiana Contractual Requirements	11/8/13
No revisions	6/2014
Changed references to utilize LA P&P, removed attachment reference that are not present LA Procurement 2015 Policy Update	11/2014

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Updated NCQA date reference	9/15
Added Scheduler to Trucare Dashboard	8/16
Updated reference to InterQual to current year	
Added RFP reference 8.4.2.5	8/18
Changed “Not using at this time” behind Calendar to reflect consistency throughout policy	
Added “Not using at this time” for scheduler	
Updated Scope to reflect a Plan Medical Management Policy	7/19
Changed TruCare Manual to Corporate TruCare User guides	
Removed reference to 2016 InterQual McKesson Corporation	
Updated RFP reference to Emergency Contract	5/20
Updated TruCare sections to correctly reflect current utilization by the CM and UM department.	
Annual Review <u>Updated Medical Management to Population Health Clinical Outcomes</u> <u>Updated TruCare sections to reflect TruCare 8.0 upgrade</u>	<u>32/21</u>

POLICY AND PROCEDURE APPROVAL

The electronic approval retained in RSA Archer, ~~the Company's P&P management software,~~ is considered equivalent to a signature.

~~The electronic approval retained in RSA Archer, Centene's P&P management software, is considered equivalent to a physical signature.~~

Sr. Vice President, Population Health: Approval on File

Chief Medical Officer: Approval on File