

SUBJECT: MANAGEMENT OF INFORMATION

EFFECTIVE
DATE: 02-09-11 (replaces 03-26-10)

APPROVED BY:

Reviewed (no changes): _____

Executive Director

POLICY

It is the policy of McIntosh Trail CSB to provide an integrated computerized information system that will include consumer records (consumer demographics, third party payor, income, lawful presence, responsible party), consumer billing, accounting, personnel, and reports useful to the organization and that are required by federal and state regulations.

ALL information in the system will be considered confidential and anyone having access to the system will follow the guidelines as set forth in the area policy and procedure on confidentiality.

PROCEDURE

1. ACCESS TO THE SYSTEM

- A. All new employees shall fill out a Request for Technology Access Form at orientation on their hire date. The IT Coordinator will assign a default password for the new employee that is to be changed by them to a unique password at their first log-in. THAT PASSWORD IS TO BE USED ONLY BY THAT EMPLOYEE.
- B. Level of access/information to the system will be determined by the level of the position and information necessary to carry out the position responsibilities. Access to the system will be on a "need to know" basis limiting unnecessary access at all times.
- C. Designated staff will be permitted to make corrections to certain data in the system as follows:
1. Data Entry Clerks are permitted to change basic consumer information, i.e. address, site location, payment status, etc.
 2. Billing Clerks are permitted to correct/delete entries, strictly following the agency's policy. After date of entry, changes/deletions that need to be made are referred to designated UM-Billing staff.
 3. Clinicians/case coordinators are permitted to make corrections on errors in their own treatment notes, but not notes of other clinicians/case coordinators. Treatment notes CANNOT be removed from the system except in very rare cases. If it is determined that a note must be removed from the system, written justification and the request must be sent to the UM-Billing Department.
 4. Only designated UM-Billing staff are permitted to remove data (zero out units, service code change, authorization number changes, social security number, CID, MHIS) from the system. When it is determined that data needs to be removed from the system, written justification and the request for change/deletion is sent to the UM Department.

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PROCEDURE (Continued)

2. SYSTEM MAINTENANCE/BACKUP

- A. An automatic backup of data is done at 12:00 a.m. every night. The IT Department places the backup tapes in a fire retardant filing cabinet each morning and each Monday one tape is pulled and placed in a safety deposit box at a local bank. The CFO also has access to the safety deposit box.
- B. Whenever hardware/software problems arise within the system, the vendor is contacted immediately and the problem(s) are resolved within 2 - 4 hours. In case of a major problem, the vendor comes on site and makes repairs.

3. TRAINING FOR USERS OF THE COMPUTERIZED SYSTEM

- A. It shall be the responsibility of the IT staff to assure that all staff receive training on the use of the computer system. IT staff will offer specialized training as requested.
- B. It shall be the responsibility of the program manager to coordinate with IT and UM-Billing for training new employees regarding the computer system.
- C. IT and/or UM-Billing staff will conduct training sessions for staff when there are major changes made to the system. For minor changes, computer transmittals will be sent to all users of the system.
- D. When requested, IT and/or UM-Billing staff will provide specialized one-on-one training for area staff on the various programs available in the system.

4. BILLING

A. CONSUMER

It is the responsibility of Billing staff to assure that consumer balances are always accurate. Consumer statements are printed monthly by Billing staff and are mailed to consumers.

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PROCEDURE (Continued)

4. Billing (Continued)

B. MEDICAID/State Contract/CMO

It is the responsibility of Billing staff to transmit Medicaid for services that are reimbursable weekly and to post the payments when the remittance advices are received. Billing staff will research any unpaid or denied claims and make adjustments when appropriate.

Medicaid for outpatient, CSP Services and pharmacy services are electronically transmitted weekly for Medicaid eligible recipients.

C. INSURANCE/MEDICARE

It is the responsibility of Billing staff to electronically transmit Medicare claims weekly. Insurance claims are printed monthly and mailed to insurance companies.

5. DATA COLLECTION

It is the responsibility of IT and/or UM-Billing staff to collect internal and external data and generate reports for use by managerial staff in comparing costs data, consumer, and research-related information and other specialized reports as requested by management and outside entities.