



Dialog with Post-n-Track

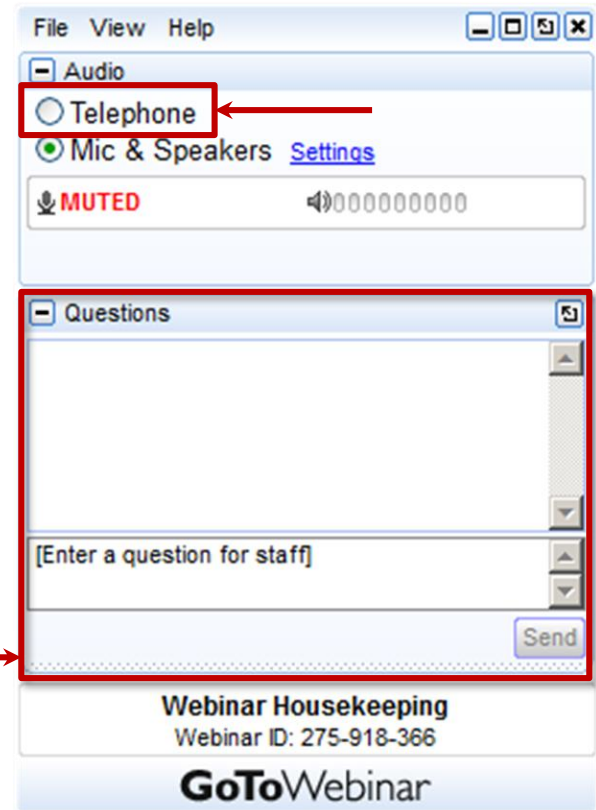
How a Healthcare Clearinghouse
has Successfully Implemented the
CAQH CORE Operating Rules

Tuesday,
September 13th, 2016
2:00 – 3:00 PM ET

Logistics

Presentation Slides & How to Participate in Today's Session

- Download a copy of today's presentation slides at caqh.org/core/events
 - Navigate to the Resources section for today's event to find a PDF version of today's presentation slides
 - Also, a copy of the slides and the webinar recording will be emailed to all attendees in the next 1-2 business days
- The phones will be muted upon entry and during the presentation portion of the session
- At any time throughout the session, you may communicate a question via the web



Questions can be submitted *at any time* with the **Questions panel on the right side of the GoToWebinar desktop**

Thank You Speakers!

CAQH CORE would like to thank our guest presenters for today's webinar.

Post**Track**[®]

Information logistics for healthcare management

Randy Ulloa
Chief Information Officer

Michael Knowles
Vice President, Sales and
Customer Engagement

Session Outline

- Welcome and Introduction
- Phase I-III CAQH CORE Operating Rules and Voluntary CORE Certification
- Post-N-Track Company Profile
- Virtual Dialog with Post-N-Track
- Q&A

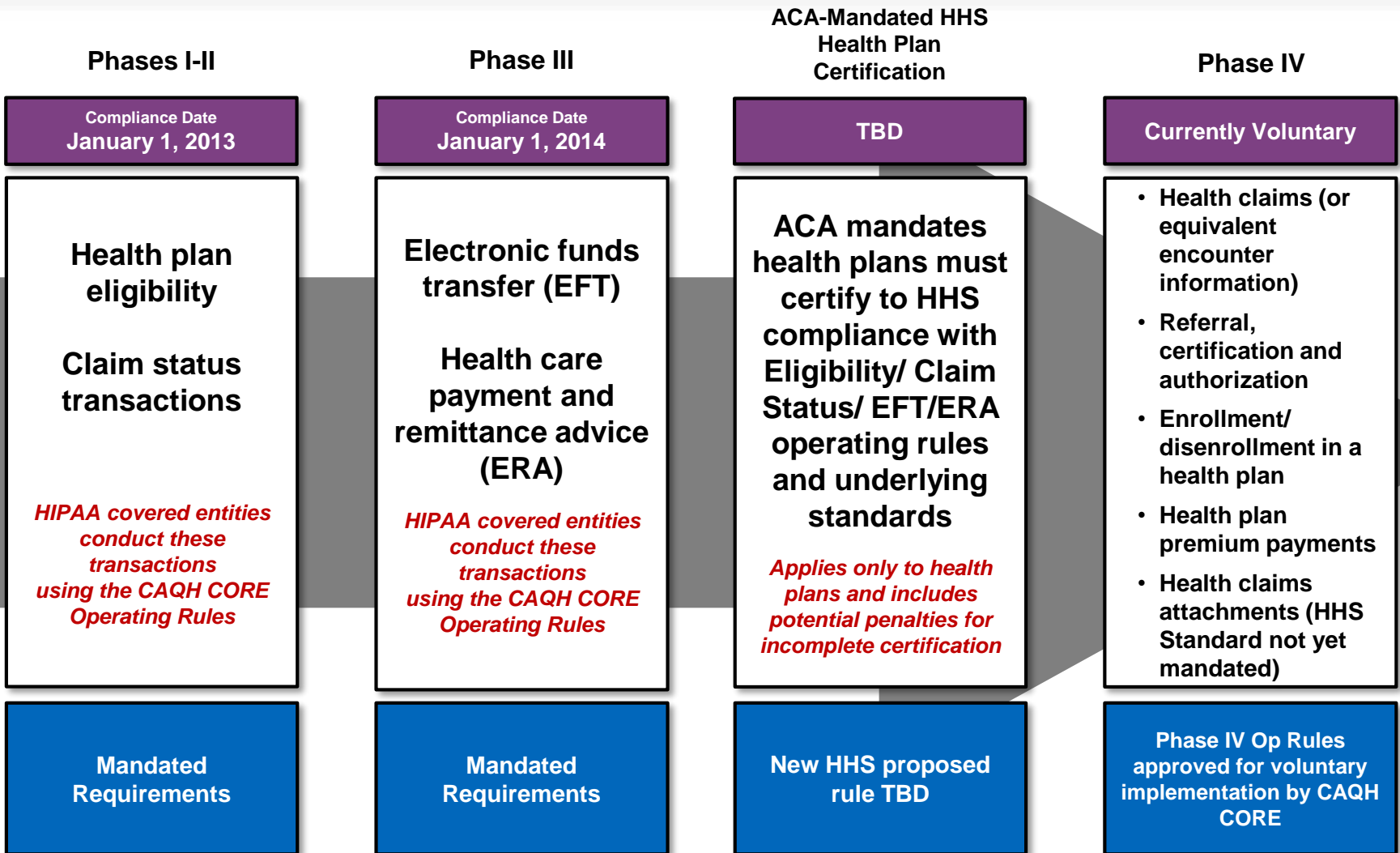
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Phase I-III CAQH CORE Operating Rules and Voluntary CORE Certification

Robert Bowman
Associate Director, CAQH CORE

ACA Mandated Operating Rules and Certification

Significant Change over Short Period of Time



2015 CAQH Index: The Only Industry Source Tracking Transition to Adoption of Electronic Transactions

Eligibility & Benefit Verification (70.5% Adoption)

There was a 5.2 percent increase in fully electronic eligibility & benefit verifications, corresponding to a large decline (-4.3% points) in partially automated (e.g., web portals/IVR) verifications.

Claim Status Inquiry (56.5% Adoption)

The highest adoption increase of fully electronic transactions (+6.9% points) was observed for claim status inquiries, corresponding to a decline in partially automated (-7.3% points).

Claim Payment (61.4% Adoption)

Electronic funds transfer (EFT) adoption increased to 61.4 percent in 2014 (+4.3% points), which represents a slower increase than the prior year (+7.3% points). Virtual card reporting is expected in 2015 data.

Remittance Advice (49.6% Adoption)

There was a steady increase in adoption (+4.7% points) of electronic remittance advice (ERA) transactions, but more than a third remain fully manual.

- The growth in adoption for ERA and EFT were not as rapid as may have been anticipated given the ACA mandated operating rules were effective January 2014.
- This may suggest, as has been seen with other policies, that regulation may take more than one year of implementation from the effective date to realize significant impact. As noted, eligibility and claim status adoption increased more rapidly two years following the effective date of operating rules.



For more information on the CAQH Index, go to www.caqh.org/expressions/caqh-index

Phases I & II

Improves Transaction Processing by Providing Important Data Quickly & Securely

ELIGIBILITY PHASE I



- Health Plan Name
- Coverage Dates

- Static Financials:
 - Co-pay
 - Co-insurance
 - Base deductibles
 - Benefit-specific and base deductible – individual and family

- In/Out of network variances
- Remaining deductible amounts
- Enhanced patient identification and error reporting requirements

ELIGIBILITY & CLAIM STATUS PHASE II



- Companion Guide – common flow/format
- System Availability service levels – minimum 86% availability per calendar week

- Real-time and batch turnaround times (e.g. 20 seconds or less for real time – next day for batch)
- Connectivity via internet and aligned with NHIN direction, e.g. supports plug and play method (SOAP and digital certificates and clinical/administrative alignment)
- Acknowledgements (transactional)*

*NOTE: The HHS Final Rule excludes rule requirements pertaining to use of Acknowledgements

Phase III

Faster Payment & Accurate Reconciliation



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Uniform Use of CARCs & RARCs (835) Rule

Identifies a *minimum* set of four CAQH CORE-defined Business Scenarios with a *maximum* set of CAQH CORE-required code combinations that can be applied to convey details of the claim denial or payment to the provider.

Identifies a *maximum* set of standard data elements for EFT enrollment.



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Health Care Claim Payment/Advice (835) Infrastructure Rule

- Specifies use of the CAQH CORE Master Companion Guide Template for flow and format
- Requires entities to support the Phase II Connectivity Rule
- Includes batch acknowledgement requirements*
- Defines a dual-delivery (paper/electronic) to facilitate provider transition to electronic remits

***Note:** CMS-0028-IFC excludes requirements pertaining to acknowledgements

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EFT/ERA Reassociation (CCD+/835) Rule

- Addresses provider receipt of the CAQH CORE-required minimum ACH CCD+ Data Elements required for re-association
- Addresses elapsed time between the sending of the v5010 835 and the CCD+ transactions
- Determines requirements for the resolving late/missing EFT/ERA transactions
- Recognition of the role of NACHA Operating Rules for financial institutions

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EFT Enrollment Data Rule (380) ERA Enrollment Data Rule (382)

- Outlines a flow and format for paper and electronic collection of the data elements
- Requires health plan to offer electronic EFT enrollment
- Requires providers to specify how payments should be made, i.e. by NPI or by Tax ID, as part of the EFT &/or ERA enrollment process

Voluntary CORE Certification

Developed BY Industry, FOR Industry

[CORE Certification](#) is the most robust and widely-recognized industry program of its kind. Its approach assures an independent, industry-developed confirmation of conformance with operating rules and underlying standards:

Requirements are developed by broad, multi-stakeholder industry representation via transparent discussion and polling processes.

Required conformance testing is conducted by third party testing vendors that are experts in EDI and testing.

CAQH CORE serves as a neutral, non-commercial administrator:

Authorizes the conformance testing vendors.

Reviews and approves the Certification applications and conformance test reports before a Certification Seal is awarded.



Entities that Can Become CORE-certified

Health Plan Stakeholder Types	Provider Stakeholder Types	Clearinghouse Stakeholder Types	Vendor Solutions or Products
HIPAA-covered Health Plan	HIPAA-covered Provider	Clearinghouse as defined by HIPAA	Health Plan vendor service
Third Party Administrators	Physicians	Clearinghouse (not covered by HIPAA)	Health Plan vendor product
Health Insurance Issuer	Hospitals	Health Information Exchange	Provider vendor service
Government Payers, including Medicaid Plans	Provider's agent	Health Insurance Marketplaces or Exchanges	Provider vendor plan
Group Health Plan	Independent Physician Association	Financial Institution	
Health Plan Agent			





All Trading Partners are strongly encouraged to become CORE-certified!

CORE Certifications Awarded by Stakeholder Type

Nearly 300 CORE Certifications to date!

<p>Health Plans</p> 						
<p>Providers</p> 						
<p>Clearinghouses</p> 						
<p>Vendor Solutions</p> 						

Voluntary CORE Certification is Good for Business

HEALTH PLANS 	PROVIDERS 	CLEARINGHOUSES 	VENDOR SOLUTIONS 
<p>Conduct secure, timely, and streamlined electronic transactions.</p>	<p>Eliminate time-consuming calls/paperwork</p>	<p>Add value for current customers and attract new customers.</p>	
<p>Demonstrate conformance with federally mandated operating rules and underlying standards.</p>	<p>Increase patient satisfaction through efficient patient services</p>	<p>Meet expectations: CORE Certification is becoming a trading partner contract expectation by health plans and providers.</p>	
<p>Show that you are maximizing the efficiencies afforded by the operating rules and underlying standards.</p>	<p>Show that you are maximizing the efficiencies afforded by the operating rules and underlying standards.</p>	<p>Guarantee that your systems, products, or services are conformant with the operating rules and underlying standards.</p>	<p>Help your customers: CORE Certification allows your customers the value-add of “drafting” behind your certification and also becoming CORE-certified.</p>
<p>Achieve these goals through CORE Certification, a process that uses industry-developed conformance requirements, a third-party tester, and a neutral, non-commercial administrator.</p>			

Polling Question #1

Which of the currently mandated CAQH CORE Operating Rules has your organization implemented:

(Check all that apply)

1. Phase I: Eligibility
2. Phase II: Eligibility & Claims Status
3. Phase III: Electronic Funds Transfer (EFT) & Electronic Remittance Advice (ERA)
4. None
5. Not applicable/Don't know

PostⁿTrack[®] is now...

P|N|T dataSM
THE DATA COORDINATION SPECIALISTS

PNT Data Corp.
-- a Service Disabled Veteran-Owned Business
Sept. 13, 2016

Company Snapshot

- 11+ years of growth and success
- Extensive healthcare data expertise
- Large scale data coordination platform
- Gartner - Cool Vendor 2015, Healthcare Payers
- Gartner Hype Cycle 2015 & 2016 for Clinical Data
- EHNAC and CORE I, II, III certified

EDI Services

- Direct Exchange
- Core Systems Consolidation
- Consumerism
- Compliance
- Cost Estimation
- Delegated Vendor Management
- Shared Accumulator Management

Clinical Data Services

- Clinical data integration
- HEDIS and Star measures improvement
- Population Health
- Clinical Portal Integration

Payers



Providers / Hospitals



Labs



Vendors



Every Initiative In Healthcare Starts With DATA

Clinical data, administrative data, financial data flowing among and between payers, plans, providers and vendors.

Where there is data – there is complexity – there is chaos:

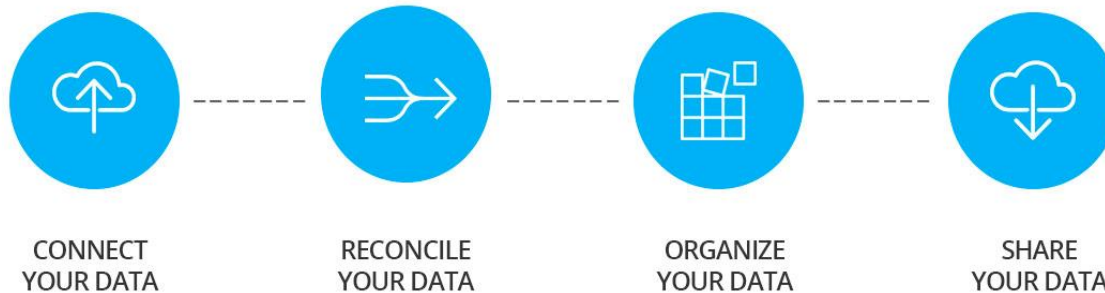
- Numerous sources
- Connectivity issues
- Increasing volumes
- Disparate interfaces
- Multiple standards
- Different formats
- Missing content
- Changing requirements
- Compliance mandates
- Poor quality
- Limited transparency
- Aging systems

We solve data chaos.

Data Coordination is Our Focus & Core Competence

Our **people** are subject matter experts on the fundamentals and complexities of healthcare data - types, sources, formats, volumes, and content - in highly complex and data intensive healthcare entities.

Our **process** is tested, transparent and proven.



Our **platform** is secure, scalable and reliable.



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Virtual Dialog with PNTdata

Moderator: Jessica Porras
Senior Manager, CAQH CORE

Virtual Dialog with PNTdata



Randy Ulloa
Chief Information Officer
PNTdata

Robert Bowman
CAQH CORE
Associate Director



Michael Knowles
Vice President, Sales and
Customer Engagement
PNTdata

Moderator
Jessica Porras
CAQH CORE
Senior Manager

Polling Question #2

Do you anticipate your organization will become CORE Certified in 2016?

1. Yes
2. Unsure
3. No
4. Not applicable to my stakeholder type
5. Already CORE-certified

Polling Question #3

Which of the following was the biggest challenge to your organization's implementation of the CAQH CORE Operating Rules:

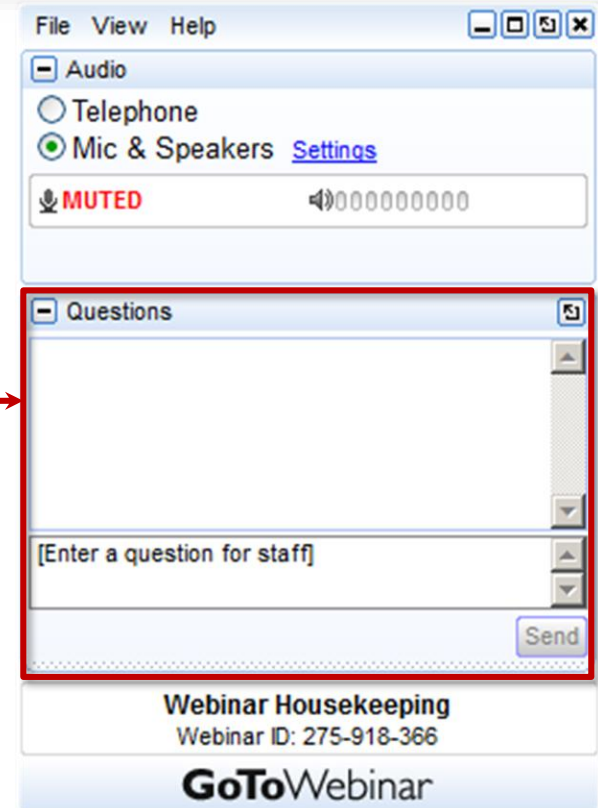
1. Fully understanding the Operating Rules
2. Overcoming resource constraints (i.e. time, staff, internal expertise)
3. Identifying and completing necessary system updates
4. Working and testing with Trading Partners (e.g. lack of communication between your organization and your vendor)
5. Did not encounter challenges/Not applicable

Audience Q & A

Please submit your questions

Enter your question into the “Questions” pane in the lower right hand corner of your screen.

**You can also submit questions at any time to
CORE@caqh.org**



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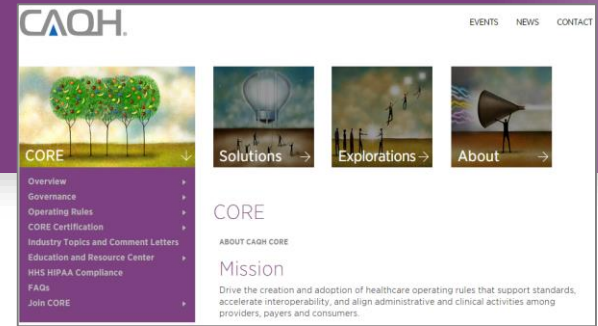
Resources

- [Presentation Slides](#)

Engage with CAQH CORE!

CAQH CORE Website

or contact us at CORE@CAQH.org



Participate in the CAQH CORE Code Combinations Task Group (CCTG) or the Enrollment Data Task Group

Become a [CAQH CORE Participating Organization](#)

Explore Voluntary CORE Certification

Register for our educational [webinars](#)

Dedicated webpages:

- ✓ [Code Combination Maintenance](#)
- ✓ [EFT/ERA Enrollment Maintenance](#)
- ✓ [Voluntary CORE Certification](#)
- ✓ [CAQH CORE Phase IV Operating Rules](#)

Upcoming CAQH CORE Education Sessions

Phase IV
Webinar Series

Humana Phase IV CAQH CORE Operating Rule Implementation Experience

TUESDAY, SEPTEMBER 20, 2016 – 2 PM ET

Phase IV
Webinar Series

Voluntary CORE Certification National Webinar – NEW: Phase IV Certification

WEDNESDAY, SEPTEMBER 28, 2016 – 2 PM ET

Uniform Use of CARCs and RARCs: How to Improve Your Denial Management Process with a Case Study Presentation from Anthem

TUESDAY, OCTOBER 3, 2016 – 2 PM ET

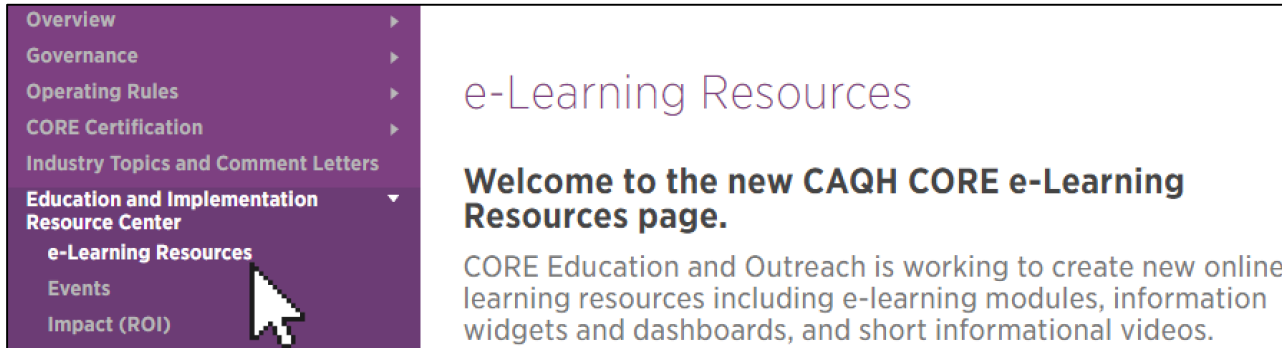
CAQH CORE Town Hall National Webinar

THURSDAY, NOVEMBER 3, 2016 – 2 PM ET

To register, please go to www.caqh.org/core/events

New e-Learning Resources from CORE

www.caqh.org/core/elearning-resources



Overview

Governance

Operating Rules

CORE Certification

Industry Topics and Comment Letters

Education and Implementation Resource Center

e-Learning Resources

Events

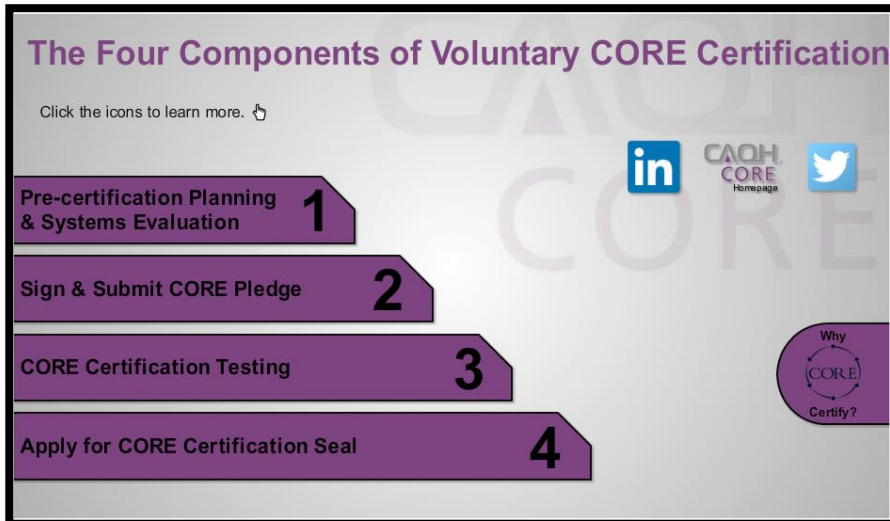
Impact (ROI)

e-Learning Resources

Welcome to the new CAQH CORE e-Learning Resources page.

CORE Education and Outreach is working to create new online learning resources including e-learning modules, information widgets and dashboards, and short informational videos.

Learn about the four components needed to complete voluntary CORE Certification



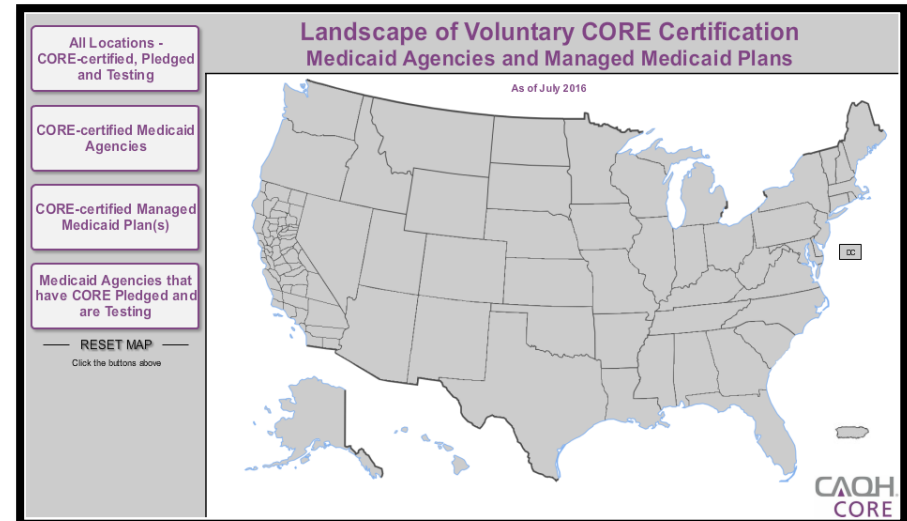
The Four Components of Voluntary CORE Certification

Click the icons to learn more.

- 1 Pre-certification Planning & Systems Evaluation
- 2 Sign & Submit CORE Pledge
- 3 CORE Certification Testing
- 4 Apply for CORE Certification Seal

Why CORE Certify?

Explore our new interactive map to learn which Medicaid agencies are achieving CORE Certification.



Landscape of Voluntary CORE Certification Medicaid Agencies and Managed Medicaid Plans

As of July 2016

- All Locations - CORE-certified, Pledged and Testing
- CORE-certified Medicaid Agencies
- CORE-certified Managed Medicaid Plan(s)
- Medicaid Agencies that have CORE Pledged and are Testing

RESET MAP
Click the buttons above

Thank you for joining us!

Website: www.CAQH.org/CORE

Email: CORE@CAQH.org



@CAQH