

# PerformCARE<sup>®</sup>

## Instruction Guide CYBER Third Party Liability (TPL) functionality

## Third Party Liability (TPL) CYBER Functionality

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## I. Introduction

The CYBER Release 1.14.1 focuses around the new Third Party Liability (TPL) functionality within CYBER, which collects private insurance information for youth. TPL information is gathered and entered by CSA staff and PE Entities at Case Management organizations (CMO/YCM/UCM, MRSS). All CYBER users that have access to a youth's record via an open Tracking Element will have the ability to access and view the Insurance tab of the Face Sheet; only CSA staff, DCBHS staff, PE Entities will have the ability to add records, edit existing records, and delete records that have not been marked as "complete" or "verified".

Once a TPL record has been marked "complete", meaning all required fields have been entered, it will be sent to the Office of the Medicaid Inspector General (OMIG) for verification; only records that contain a Medicaid ID number for the youth will be sent to OMIG for verification. Once the insurance coverage has been verified, OMIG transmits the information to Molina, who will then send a verified record to PerformCare. The verified record will have a Source of "Molina" and a Status of "Verified".

TPL records will have one of three statuses on the Insurance tab – Open, Complete, Verified. Open indicates that the record is open for editing and deletion, and is not verified. Complete indicates that all required fields have been completed, the user has indicated that the record is complete by clicking the "Complete" button, the record can no longer be edited or deleted and the record is going to be sent to OMIG for verification; Completed records will have a date in the "Sent" column on the Insurance tab once they have been sent to OMIG. Verified indicates that the TPL information has been verified by OMIG, and returned to PerformCare by Molina; these records cannot be edited or deleted from CYBER.

**Note** – The insurance information gathered in CYBER is only for the youth; in some instances, a youth may not be covered under the same insurance as their parent or legal guardian. The Insurance tab and the records listed there should only hold information for the youth. Also, the only insurance coverage that is being gathered and entered into CYBER at this time is Medical/Surgical and Mental Health coverage. Other coverage, such as Dental, Pharmaceutical and Vision, are not a part of this CYBER release and may be included in the future. The only TPL records that will be verified by OMIG will be those that include a PE/Medicaid/NJ FamilyCare/3560 ID for the youth (will automatically populate the MedicaidID field on the TPL record, under Youth Information).

## II. Accessing TPL Information

Users must first log-into CYBER with their UserID and Password. The log-in screen can be found via the PerformCare website – [www.performcarenj.org](http://www.performcarenj.org).



## CYBER LOGIN

Enter Login Name Here

Enter Password Here

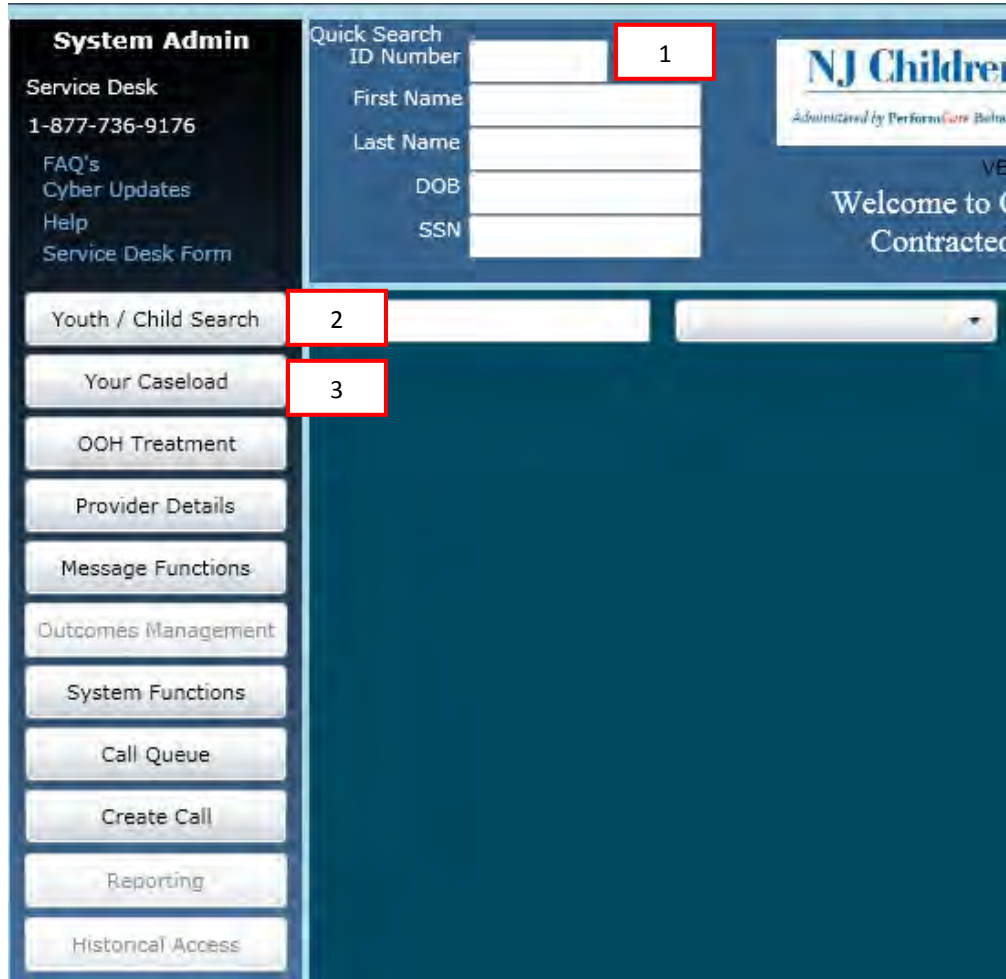
Login

As a CYBER User I understand that my work will involve access to Protected Health Information (PHI) as defined by HIPAA (The Health Insurance Portability and Accountability Act) for the purpose of providing or arranging treatment, payment or other health care operations. I also acknowledge that I am engaged by a covered entity. I further acknowledge my responsibility to protect the privacy of and to guard against inappropriate use or disclosure this PHI by logging in as a CYBER User.

This is in compliance with "The Health Insurance Portability and Accountability Act (HIPAA) of 1996 and its implementation regulations. For more information on HIPAA please go to <http://www.hhs.gov/ocr/hipaa/> "

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To access the TPL information for a youth, users will need to locate the correct youth's record by using the Quick Search function from the Welcome Page (1), the Youth/Child Search (2), or the Your Caseload function (3).

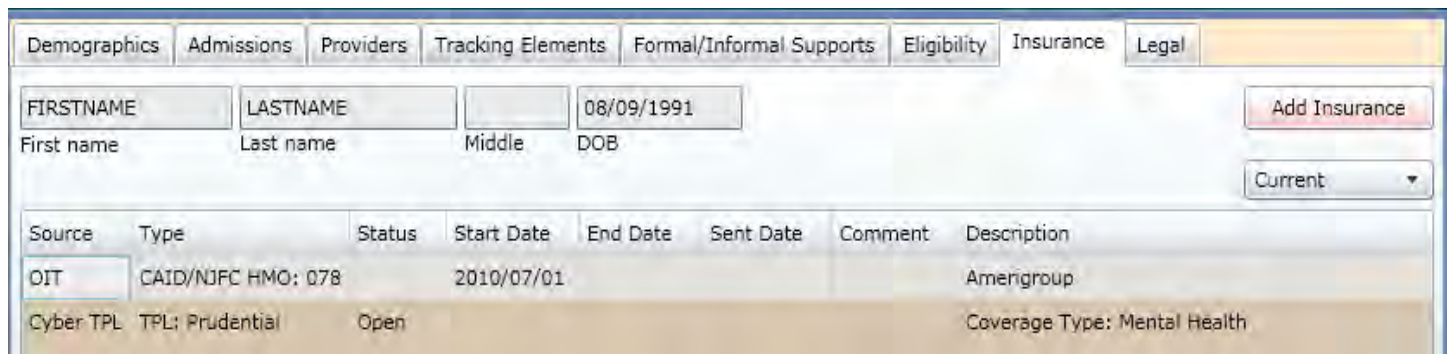


Once the correct record has been located, the user will need to navigate to the Insurance tab of the Face Sheet.



The user will find the TPL records for the youth, as well as the Medicaid HMO/Managed Care records for the youth that also appear on the Eligibility tab of the Face Sheet.

## III. Insurance Tab Details



Source	Type	Status	Start Date	End Date	Sent Date	Comment	Description
OIT	CAID/NJFC HMO: 078		2010/07/01				Amerigroup
Cyber TPL	TPL: Prudential	Open					Coverage Type: Mental Health

The Insurance tab includes the youth's First and Last Name, Middle Initial and Date of Birth from the Demographics tab. These fields cannot be edited here; changes need to be made on the Demographics tab.

The tab includes an "Add Insurance" button, which allows the user to open a new TPL record, and a filter which defaults to "Current". When set to Current, the grid will populate with only the TPL and Eligibility records that have an End Date that is in the future or that has not been entered. When the filter is set to "All", all TPL and Eligibility records, regardless of End Date or Status, for the youth will appear in the grid.

The grid includes:

- Source – indicates where the record originated; users will see OIT (Medicaid Managed Care record), Molina (Medicaid record), CYBER TPL (TPL record entered manually into CYBER on the Insurance tab) or CYBER 3560 (TPL record manually entered into CYBER from the 3560 Application).
- Type – description of the type of insurance that is detailed in the record.
- Status – indicates the current status of the record; only CYBER TPL, CYBER 3560 and Molina sourced records will have a status. One of three statuses will appear:
  - Open – indicates the record is not complete and is open for editing and deletion.
  - Complete – indicates that a user has entered information into all required fields and the record is now locked to editing and deletion. The record will be sent to OMIG for verification.
  - Verified – indicates the record has been returned to PerformCare from Molina and the insurance information has been verified as being correct.
- Start Date – start date of the insurance coverage.
- End Date – end date, or termination date, of the insurance coverage.
- Sent Date – date the record was sent to OMIG for verification; only CYBER TPL and CYBER 3560 records will have a date in this column.
- Comment – currently not being used.
- Description – details on the coverage type and/or name of the insurance carrier.

All records in the grid can be opened to show further details.

Medicaid HMO

**TPL Managed Care Data** Close

Case No. 0130087953	Person No. 01	Plan Code 082
Effective Date 2011/05/01	Termination Date	COMP. Effective Date

This is an example of a details window for a Medicaid HMO/Managed Care record. This information cannot be edited and is automatically fed into CYBER by Molina.

Insurance Details Source: Cyber-TPL

**YOUTH INFORMATION**

LAST NAME * LASTNAME	FIRST NAME * FIRSTNAME	DATE OF BIRTH * 07/17/1991	SSN 111-22-3333	YOUTH/CHILD ID 426	MEDICAID 013008795301
ADDRESS 1 205 Park Plaza	ADDRESS 2	CITY IRVINGTON	STATE IN	ZIP 07111	

**YOUTH INSURANCE INFORMATION**

LAST NAME *	FIRST NAME *	DATE OF BIRTH * <M/d/yyyy> 15	<input type="checkbox"/> SAME AS ABOVE	<input type="checkbox"/> INSURANCE CARD PRESENT
ADDRESS 1	ADDRESS 2	CITY	STATE	ZIP

**POLICY HOLDER INFORMATION**

LAST NAME *	FIRST NAME	SSN *
INSURER CODE	INSURANCE CARRIER *	INSURER PHONE ( )
INS. ADDRESS 1	INS. ADDRESS 2	CITY STATE ZIP

**INSURANCE INFORMATION**

POLICY NUMBER *	GROUP NUMBER	COVERAGE TYPE *	RELATIONSHIP *	EFFECTIVE DATE <M/d/yyyy> 15	TERMINATION DATE <M/d/yyyy> 15
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**EMPLOYER INFORMATION**

EMPLOYER CODE	EMPLOYER NAME	EMPLOYER PHONE ( )
ADDRESS 1	ADDRESS 2	CITY STATE ZIP

Save Save & Close Complete Delete Cancel View Comment

This is an example of the Insurance Details window for any TPL records manually entered into CYBER.

#### IV. Insurance Details Screen for TPL Records

The first section is for Youth Information.

YOUTH INFORMATION					
LAST NAME *	FIRST NAME *	DATE OF BIRTH *	SSN	YOUTH/CHILD ID	MEDICAID
LASTNAME	FIRSTNAME	07/17/1991	111-22-3333	426	013008795301
ADDRESS 1	ADDRESS 2		CITY	STATE	ZIP
205 Park Place			IRVINGTON	NJ	07111

**\*Note** – all fields marked with an asterisk (\*) are required fields; all must be completed in order for the record to be submitted for verification by OMIG.

All of the fields in this section will automatically populate from the youth’s Face Sheet; the fields cannot be edited from the Insurance Details screen. All changes have to be made on the Demographics tab of the Face Sheet.

The second section is for Youth Insurance Information.

YOUTH INSURANCE INFORMATION					
LAST NAME *	FIRST NAME *	DATE OF BIRTH *	<input type="checkbox"/> SAME AS ABOVE	<input type="checkbox"/> INSURANCE CARD PRESENT	
		<M/d/yyyy> 15			
ADDRESS 1	ADDRESS 2		CITY	STATE	ZIP

This section was added to differentiate between the information found on the Face Sheet and what is found on the youth’s insurance card. If the information is the same, the user can select the “Same As Above” checkbox, which will populate all fields with the same information from the Youth Information area.

**Note** – the checkbox for “Insurance Card Present” should be selected by PE Entities when they have seen the insurance card for the policy that covers the youth.

The third section is for Policy Holder Information.

POLICY HOLDER INFORMATION				
LAST NAME *	FIRST NAME	SSN *		
INSURER CODE	INSURANCE CARRIER *	INSURER PHONE		
		( )		
INS. ADDRESS 1	INS. ADDRESS 2	CITY	STATE	ZIP

Although listed as required, if the Last Name and/or SSN of the Policy Holder is not available or is unknown, the user should enter “N/A” into the fields to fulfill the requirement.

Insurance Carrier, and its associated contact information fields, are all manually entered. Care should be taken when completing; this information will aid in verifying the insurance coverage.

The fourth section is for Insurance Information.



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## INSURANCE INFORMATION

POLICY NUMBER *	GROUP NUMBER	COVERAGE TYPE *	RELATIONSHIP *	EFFECTIVE DATE	TERMINATION DATE
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<M/d/yyyy> 15	<M/d/yyyy> 15

The Policy Number may be listed as the “ID Number” on the insurance card for the youth.

Coverage Type now includes only three options – Medical/Surgical, Mental Health, Medical/Surgical/Mental Health.

Relationship includes an option for “Parent/Other”; this is the relationship of the policy holder to the youth.

Effective Date and Termination Date, if not completed by the user, will be completed by OMIG during the verification process.

The final section is for Employer Information.

## EMPLOYER INFORMATION

EMPLOYER CODE	EMPLOYER NAME	EMPLOYER PHONE		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
ADDRESS 1	ADDRESS 2	CITY	STATE	ZIP
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Although none of the fields in this section are required, completing them will assist in the insurance verification process.

The final component of the Insurance Details screen is the button row.

Save	Save & Close	Complete	Delete	Cancel	View Comment
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- Save – will save the record and keep the window open for further editing.
- Save & Close – will save the record and close it, returning the user to the Insurance tab.
- Complete – will run a validation on the required fields to check for completeness; if all fields are filled in, the record will be locked for editing and will be sent to OMIG for verification. If the fields are not completed, the user will receive an error message, stating which fields are missing and indicating that the record has not been saved.
- Delete – available only for records that have a status of “open”.
- Cancel – will cancel any actions taken prior to a Save.
- View Comment – currently not being used.

## V. TPL and 3560 Interaction

While TPL can stand alone from the 3560 Application, there are instances when a 3560 Application will not be available for submission without a complete TPL record in the system for the youth.

In a 3560 Application, the user will navigate to the Household Information tab.

3560 Request   Household Information   Income Information   Approval   Eligibility

205 Park Place   732   5554567   732   2252568  
Home Address   Apt.#/Floor   Area   Home Phone:   Area   Cell Phone:

IRVINGTON   NJ   07111   ESSEX   SIGN LANGUAGE  
City   State   Zip   County   Language spoken at home

Mailing Address, if different   Apt.#/Floor   City   State   Zip   County

+ List ALL Parents/Guardians in the Household

+ List ALL Children UNDER THE AGE OF 21 Living in the Household

First Name	Last Name	SSN	DOB	Date of Entry	Related to Parent1	Related to Parent2	Ge
FIRSTNAME	LASTNAME	111-22-3333	7/17/1991		None	None	M

Double-clicking on the youth in the Children Under the Age of 21 area will open up the Details window for the youth's insurance coverage.

Edit Child Information

First Name: FIRSTNAME   Last Name: LASTNAME

SSN: 111-22-3333   Birth Date: 7/17/1991   Race: UNKNOWN

Gender:  M    F

Full-time Student?:  Yes    No

US Citizen?:  Yes    No

Date of Entry: <M/d/yyyy>    15

Pregnant?:  Yes    No

Other health insurance now?  Yes    No

Other health insurance within the past 3 months?  Yes    No

Unpaid medical bills for the last 3 months?  Yes    No

How this child is related to the 1st parent?    Child    Stepchild    Other

How this child is related to the 2nd parent?    Child    Stepchild    Other

Accept   Cancel   Delete   View Insurance

If the youth currently has health insurance, the user must continue to select "Yes" for "Other health insurance now?" which will open the Insurance tab of the youth's Face Sheet in a new window (leaving the 3560 Application open in the background).

Youth Insurance Information

FIRSTNAME LASTNAME 07/17/1991 426  
 First name Last name DOB ID

Cancel Add Insurance

Current

Source	Type	Status	Start Date	End Date	Sent Date	Comment	Description
OIT	CAID/NJFC HMO: 082		2011/05/01				AmeriChoice of New Jersey
OIT	CAID/NJFC: 013008795301		2011/03/01				Status: 310 AFDC-C - CN Regular -
Cyber TPL	TPL:	Open					Coverage Type: None

Delete App Save Submit

The above screen-shot is an example of the open Insurance Tab from the youth's Face Sheet, with the 3560 Application still open in the background.

The user must do one of the following actions;

- Complete an existing, "open" TPL record;
- Delete an existing, "open" TPL record and start a new record, or;
- Click on the "Add Insurance" button to enter a new TPL record for the youth.

In order to submit the 3560 Application, a completed TPL record must be on file for the youth. If the TPL record is not complete, the user will be unable to submit the 3560 Application.

**Note** - If there is a saved TPL record that was started by another user, the current user (as long as they have the appropriate rights in CYBER) can complete the record in order to submit the 3560 Application. Also, if there is a completed TPL record and an open TPL record for the youth, as long as the termination/end date for the coverage (in the completed record) is in the future or has not been entered, the 3560 Application can be submitted.

If the youth currently does not have health insurance, the user must continue to select "No" for "Other health insurance now?"; if there is an open TPL record for the youth, the user will receive a warning message indicating that there is an open record. This will not prevent the user from submitting the 3560 Application.

**Note** - By choosing "No", the user is indicating that the youth does not currently have other health insurance coverage at the time that the 3560 Application is being completed.