Bidders Library on Call Tracking Records

In general, the record should indicate:

1. who called (this is usually completed automatically, but complete if its doesn't)
2. what the primary issue(s) are
3. what the resolution was
4. if the call is transferred to Tier 2, what the caller needs that can't be supplied by Tier 1.

Example One:

A woman named Marge from a physician's office, Dr. Marvin Smith, SoonerCare Provider ID 20021345, calls regarding the status of the contract renewal that he recently processed in Electronic Provider Enrollment (EPE). The agent asks if Marge is aware that she can log in and check the status herself. She says she is but the computer is down. The agent checks the EPE workflow and finds that Dr. Smith did submit a renewal but has not yet faxed in the required documentation to process the renewal. The agent explains the fax process to the office, including the necessity to use the required fax cover sheet and send only one fax at a time, and reminds the office what is needed – the doctor's license and proof of malpractice insurance.

Assuming that Dr. Smith's name, provider number, etc. already appears on the record:

Acceptable:

Marge called re: contract renewal. EPE shows waiting on faxed docs. Explained fax process and needed docs.

Unacceptable:

Where his contract is

Example Two:

A business office manager named Rich calls about an ambulatory surgery center claim, ICN 42355 dated 12/24/10 that was denied. He has completed the required form and submitted it to OHCA for reconsideration but he still has questions about what is wrong and what he can do in the future to avoid the situation. The agent refers to manager to the Tier 2 Provider Services call center.

Assuming that the ASC's name, provider number, etc. already appear:

Acceptable:

Bus mgr Rich re ICN 42355 dated 12/24/10. Completed HCA-17 process, still has questions.

Unacceptable:

Denied claim

Example Three:

Here is an example of a record with some information left off. The record has a name of a caller, however, the Member ID or the Provider ID should be filled out so the system can identify the member or provider and fill in the information so the call can be searched and tracked.

Call - Windows Internet Explorer

http://128.212.227.160/ICE/MMIS/Call%20Tracking/Information/tabid/134/Default.aspx?SAK_CALL=6440157

Call Tracking Information - CTN #6440157 from the Caller: lanett

CTN	6440157	Provider ID/Loc		Provider Name	
Caller Name	lanett	Member ID		Member Name	
Caller Type	Other	Employer ID		Comments	N/A
Call Status	Closed	ATN		ICN	
Date Received	07/07/2011	Other	4056023312	Call Unit	Premium Assistance Unit
Time Received	14:29:53	Time Updated	14:30:30	Tax ID	
Date Updated	07/07/2011	Duration(hhhhh:mm:ss)	00000:00:37	Clerk ID	KEETA DAVES @ EDS

Navigator

- Call Tracking
- Base Information
- Call History
- Call Notes
- Call Survey

Call History - CTN #6440157 from the Caller: lanett

Clerk	Call Type	Call Category	Transfer Clerk	From Unit	To Unit	From Phone	To Phone	Transfe Date
KEETA DAVES @ EDS	O-EPIC IP	Program Question		Premium Assistance Unit				

Sort Order

Clerk	KEETA DAVES @ EDS	Call Category*	Program Question
Call Type*	O-EPIC IP	Transfer Clerk	
From Unit	Premium Assistance Unit	From Phone	
To Unit		To Phone	
Transfer Date		Call Status*	Closed
Resolution Clerk	KEETA DAVES @ EDS		

new

save cancel Call Tracking Home

Example Four:

The note below is unacceptable because, the agent transferred the caller, but did not explain why the caller was being transferred.

Call - Windows Internet Explorer

http://128.212.227.160/ICE/MMIS/Default.aspx?TabId=134&SAK_CALL=6416097

Call Survey

Sort Order

Clerk	QUANTON WARE @ OHCA	Call Category*	Invoice Inquiry
Call Type*	Inquiry	Transfer Clerk	RYLAN DRAVON @ OHCA
From Unit	Online Enrollment Applications	From Phone	0000005453
To Unit	Beneficiary Services	To Phone	0000005726
Transfer Date	06/30/2011 16:18:15	Call Status*	Closed
Resolution Clerk	QUANTON WARE @ OHCA		

new

Call Notes - CTN #6416097 for Member #045015457, MILLER, HOLLY from the Caller: HOLLY

Top Nav ? A Min X

Note	Description	Note Type	Clerk	Response	Date	Time
1	TRANSFER CALLER	Inbound Call	QUANTON WARE @ OHCA	Transferred Caller	06/30/2011	16:18:03

Sort Order

Description* TRANSFER CALLER

Note Type*	Inbound Call	Clerk	QUANTON WARE @ OHCA
Response*	Transferred Caller	Date	06/30/2011 16:18:03
Comments	No		

save cancel Call Tracking Home new

Prefs

Acceptable : Caller has questions about definitions of specific income items.

Example Five:

Below are some examples of notes, although short, are descriptive enough to tell what the agent told the caller or did with the call.

Call - Windows Internet Explorer

http://128.212.227.160/ICE/MMIS/Default.aspx?TabId=134&SAK_CALL=6463454

File Edit View Favorites Tools Help

Call

Call Type* Inquiry

From Unit SC Help Line

To Unit

Transfer Date

Resolution Clerk CHRISTINA BOWEN-CARR @ OHCA

Transfer Clerk

From Phone

To Phone

Call Status* Closed

new

Call Notes - CTN #6463454 for Member #025695175, HUNTER, TAYLOR from the Caller: shalonda

Top Nav ? A Min X

Note	Description	Note Type	Clerk	Response	Date	Time
1	adv active until 07/31/12	Inbound Call	CHRISTINA BOWEN-CARR @ OHCA	Resolved Inquiry	07/13/2011	11:01:25

Sort Order

Description* adv active until 07/31/12

Note Type* Inbound Call

Response* Resolved Inquiry

Comments No

Clerk CHRISTINA BOWEN-CARR @ OHCA

Date 07/13/2011 11:01:25

new

Prefs

save cancel Call Tracking Home

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Call - Windows Internet Explorer

http://128.212.227.160/ICE/MMIS/Default.aspx?TabId=134&SAK_CALL=6463424

File Edit View Favorites Tools Help

Call

Call Notes

Call Survey

Prefs

Sort Order

Clerk	CRISSY M. DUNCAN @ OHCA	**Call Category***	Eligibility Inquiry
Call Type*	Inquiry	**Transfer Clerk**	MARC FISCUS @ EDS
From Unit	SC Help Line	**From Phone**	0000007113
To Unit	Online Enrollment Internet Helpdesk	**To Phone**	0000001383
Transfer Date	07/13/2011 10:59:27	**Call Status***	Closed
Resolution Clerk	CRISSY M. DUNCAN @ OHCA		

new

Call Notes - CTN #6463424 for Member #036589443, FELSINGER, ESTEAL from the Caller: andrea

Top Nav ? A Min X

Note	Description	Note Type	Clerk	Response	Date	Time
1	needing a pin number	Inbound Call	CRISSY M. DUNCAN @ OHCA	Transferred Caller	07/13/2011	10:59:21

Sort Order

Description* needing a pin number

Note Type*	Inbound Call	**Clerk**	CRISSY M. DUNCAN @ OHCA
Response*	Transferred Caller	**Date**	07/13/2011 10:59:21
Comments	No		

save cancel Call Tracking Home new

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Here is a longer note, but says what the agent told the caller.

Call - Windows Internet Explorer

http://128.212.227.160/ICE/MMIS/Call%20Tracking/Information/tabid/134/Default.aspx?SAK_CALL=6463955

File Edit View Favorites Tools Help

Call

Page Tools

Resolution Clerk JACKIE BROWN @ OHCA

new

Call Notes - CTN #6463955 for Member #006213513, HARWOOD, TAMARA from the Caller: Pamara

Top Nav ? A Min X

Note	Description	Note Type	Clerk	Response	D
1	Q. Are hearing aides covered for adults. Adv they are not co	Inbound Call	JACKIE BROWN @ OHCA	Resolved Inquiry	07

Sort Order

Description* Q. Are hearing aides covered for adults. Adv they are not covered from age 21 and older, gave caller 211 # to call for assistance

Note Type* Inbound Call

Clerk JACKIE BROWN @ OHCA

Response* Resolved Inquiry

Date 07/13/2011 11:39:15

Comments No

new

Prefs

save cancel Call Tracking Home

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