



ARIES Focused Technical Assistance:

Improving Insurance Data

February, 2012

teamwork

teamwork

Improving Data Collection

- The State Office of AIDS (OA) is now working with providers to improve the quality of data that is collected and entered into ARIES.
- Today we're going to discuss insurance data entry.

Why is this important?

- The Ryan White Program (RW) is the “payer of last resort.”
- RW serves those with no source of healthcare insurance and/or those with Medi-Cal or private insurance whose care needs are not being met.

Why is this important? (cont.)

- OA programs, HIV Care Program (HCP) and Medi-Cal Waiver Program (MCWP), require clients' insurance status to be collected and entered into ARIES.
- Insurance screens in ARIES used to document clients with and without insurance.
- Non-OA RW programs, such as Parts A, C, D, and F, also require insurance screening and data collection.
- Insurance Source is required for the Ryan White Services Report (RSR).

Why is this important? (cont.)

- Clients' insurance status will be included in OA's program monitoring efforts as part of the 6-month eligibility screening/recertification for RW.
- RW Programs are expected to establish and monitor procedures to ensure that all funded providers verify and document client eligibility.

ARIES Site Monitoring Report

Insurance

HCP is the “payer of last resort.” Every client should have at least one insurance record documented in ARIES, including uninsured clients who should have a “No Insurance” record.

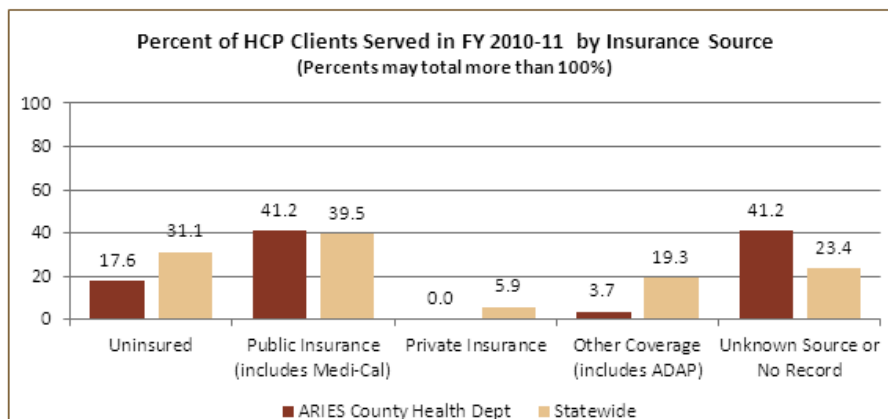
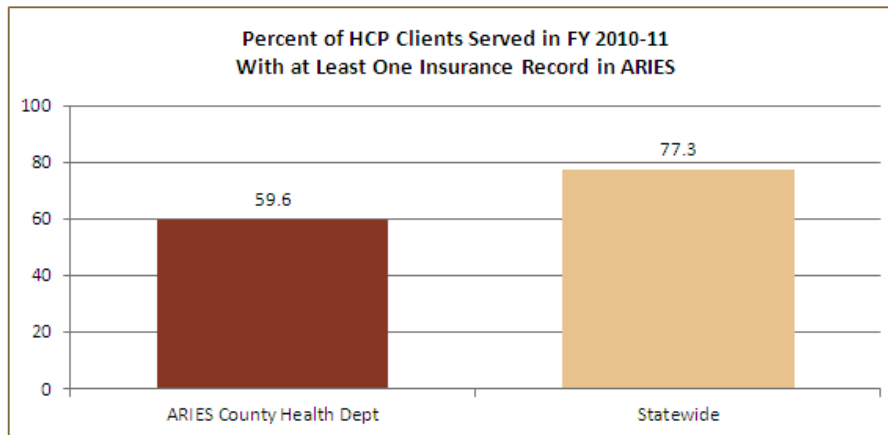
OA reports this non-clinical performance measure to HRSA. The target set by OA is that 95% of HCP clients must have at least one insurance record in ARIES. Statewide, 77.3% of clients met this measure during FY 2010-11. By comparison, 59.6% of ARIES County Health Dept's clients had at least one insurance record.

Clients may have *more than one valid* insurance record at a time in ARIES. At some time during FY 2010-11, 17.6% of ARIES County Health Dept's clients were uninsured, 41.2% had some source of public insurance (such as Medi-Cal and Medicare), none had private insurance, and 3.7% had some other type of coverage (such as ADAP, vision, or dental). Clients who either had insurance records with an "unknown" source or no record at all accounted for 41.2% of the caseload.

For more information, refer to ARIES Policy Notice C4 on *Insurance* posted at www.projectaries.org.

ARIES County Health Dept

2



Entering Insurance Information

- We will review the steps for entering insurance information for a client in ARIES.
- We will also give tips for collecting this information accurately.

Begin by searching for the client record.

Client Search

To find a client, or to check if a client is new to your agency, enter in some or all of the following information. You may use the wildcard *.

Last Name	<input type="text" value="flash"/>	
First Name	<input type="text" value="jack"/>	
Middle Initial	<input type="text"/>	
Client ID	<input type="text"/>	
SSN	<input type="text"/>	123-45-6789
Date of Birth	<input type="text"/>	mm/dd/yyyy
Display	<input type="text" value="20"/> results	
	<input type="checkbox"/> Search Related/Affected Individuals	

Search >

Click "Search"

If the client record is found, ARIES brings you to the Demographics tab.

< Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS ELIGIBILITY PROGRAMS MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES SERVICES CUSTOM DATA

CONTACT INFO DEMOGRAPHIC DETAIL LIVING SITUATION AGENCY SPECIFICS CONTACT INFOR

Jack B Flash

Contact Information [Edit](#)

Phones:
530-889-2437 (Work) -- do not contact; be confidential; no messages

Residence:
as of 1/1/2001
1234 Grass Valley Hwy
Auburn, CA 95603
County: Placer
Geog Area/HSDA:

Previous Address:
as of 1/1/2001
1234 Grass Valley Hwy
Auburn, CA 95603
County: Placer
Geog Area/HSDA:

[Contact Information](#)

Contact by mail: No
Be confidential

Mailing Address:
1234 Grass Valley Hwy
Auburn, CA 95603
County: Placer
Geog Area/HSDA:

Emergency:
Jill Flash
1234 Grass Valley Hwy
Auburn, CA 95603
Phone 1: 530-889-2437
Phone 2:
be confidential; no messages

Click the "Eligibility" tab.

Eligibility Read-only Screen...

< Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS ELIGIBILITY PROGRAMS MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES SERVICES CUSTOM DATA

ELIGIBILITY DOCUMENTS FINANCIAL INSURANCE ELIGIBILITY DOC

Jack B Flash

Eligibility Documents [Edit](#)

Click "Insurance"

Type	Doc Date	Obtained	Expires	Source	Location	Not
ARIES Consent Form	11/1/2010	11/1/2010	10/31/2013		WebEx	Shar
HIV Letter of Diagnosis	11/1/2010	11/1/2010		Doctor	WebEx	
ARIES Consent Form	11/15/2008	11/15/2008	11/14/2009		WebEx	
ADAP					WebEx	

[Contact Information](#)

Insurance Read-only Screen

< Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS ELIGIBILITY PROGRAMS MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES SERVICES CUSTOM DATA

ELIGIBILITY DOCUMENTS FINANCIAL INSURANCE INS

Jack B Flash

Insurance **Edit**

Source	Type	Pend.	Prim Ins	Prim HIV Ins	Carrier	Policy #	Start / End	Prem
--------	------	-------	----------	--------------	---------	----------	-------------	------

[Contact Information](#)

Click "Edit"

Insurance Edit Screen

DEMO DEMO DEMO DEMO DEMO DEMO

Jack B Flash Insurance

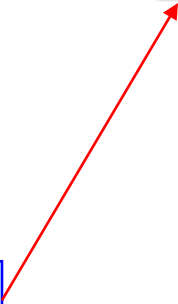
Source ✱	Type	Pending	Prim Ins	Prim HIV Ins	Carrier	Policy #	Start Date ✱	End Date ✱	Mo. Premium	Note
----------	------	---------	----------	--------------	---------	----------	--------------	------------	-------------	------

[New](#)

[Save + Next ▶](#) [Save + Done](#) [Cancel](#)

IMPORTANT: The following screens are used to document clients with and without insurance

Click "New"



Entering a New Record

DEMO DEMO DEMO DEMO DEMO DEMO

Jack B Flash Insurance

Source *	Type	Pending	Prim Ins	Prim HIV Ins	Carrier	Policy #	Start Date *	End Date *	Mo. Premium	Note
No insurance	No Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

if other:

- ADAP
- Dental
- Medi-Cal/Medicaid
- Medicare
- Other public insurance
- Private 1
- Private 2
- Private 3
- Public 1
- Public 2
- Veteran
- Vision
- Other
- No insurance**
- Unknown

- Baby
- CA Children's Services
- Cal-COBRA
- CHAMPUS
- CHIPPS
- CMSP
- COBRA
- Conversion (Rx)
- County Sponsored
- DentiCAL
- Full Scope
- HIPIC
- Indian Affairs
- LIHP
- Managed
- Medicare A
- Medicare A & B
- Medicare D
- North Star
- OBRA
- Private Self-pay
- Restricted
- Shared Cost
- Veterans
- Other
- No Insurance**
- Unknown

Select the appropriate insurance "Source" and "Type"

Entering a New Record (cont.)

DEMO DEMO DEMO DEMO DEMO DEMO

Jack B Flash Insurance

Source *	Type	Pending	Prim Ins	Prim HIV Ins	Carrier	Policy #	Start Date *	End Date *	Mo. Premium	Note
No insurance	No Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> if other:	<input type="text"/>	1/1/2010	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Contact Information](#)

Save Cancel

Enter a "Start Date"

Click "Save"

Eligibility Edit Screen

DEMO DEMO DEMO DEMO DEMO DEMO

Jack B Flash Insurance

Source *	Type	Pending	Prim Ins	Prim HIV Ins	Carrier	Policy #	Start Date *	End Date *	Mo. Premium	Note
No insurance	No Insurance	No	No	No			1/1/2010			

[Edit](#)
[New](#)

[Save + Next ▶](#) [Save + Done](#) [Cancel](#)

[Contact Information](#)

The insurance record entered appears

To edit this record, click "Edit"

Editing and Existing Record

DEMO DEMO DEMO DEMO DEMO DEMO DEMO

Jack B Flash Insurance

Source *	Type	Pending	Prim Ins	Prim HIV Ins	Carrier	Policy #	Start Date *	End Date *	Mo. Premium	Note
No insurance	No Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> if other:	<input type="text"/>	1/1/2010	12/31/2011	<input type="text"/>	<input type="text"/>

[Contact Information](#)

Save
Cancel
Deactivate

Enter an "End Date"

Click "Save" when done.

Eligibility Edit Screen

DEMO DEMO DEMO DEMO DEMO DEMO DEMO

Jack B Flash Insurance

Source *	Type	Pending	Prim Ins	Prim HIV Ins	Carrier	Policy #	Start Date *	End Date *	Mo. Premium	Note
No insurance	No Insurance	No	No	No			1/1/2010	12/31/2011		

[Contact Information](#)

Save + Next > **Save + Done** **Cancel** **Edit** **New**

The "End Date" appears as entered

Click "New" to enter a new record

Entering Another New Record

DEMO

DEMO

DEMO

DEMO

DEMO

DEMO

DEMO

Jack B Flash Insurance

Source *	Type	Pending	Prim Ins	Prim HIV Ins	Carrier	Policy #	Start Date *	End Date *	Mo. Premium	Note
No insurance	No Insurance	No	No	No			1/1/2010	12/31/2011		
Public 1	LIHP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other	123456789	1/1/2012		100.00	

Other
* if other:
th Choice

Save
Cancel

Enter "Source" and "Type"

"Pending"?
"Primary Insurance"?
"Primary HIV Insurance"?"

Select "Carrier" and "Policy #"

- Blue Cross
- Kaiser
- Aetna
- Other

Enter a "Start Date"

Enter a Mo. Premium amount

Click "Save"

Eligibility Edit Screen

DEMO

DEMO

DEMO

DEMO

DEMO

DEMO

DEMO

Jack B Flash Insurance

Source *	Type	Pending	Prim Ins	Prim HIV Ins	Carrier	Policy #	Start Date *	End Date *	Mo. Premium	Note
No insurance	No Insurance	No	No	No			1/1/2010	12/31/2011		
Public 1	LIHP	No	No	No	Health Choice	123456789	1/1/2012		\$100.00	

Edit

Edit

New

Save + Next ▶

Save + Done

Cancel

The insurance record entered appears

[Contact Information](#)

Eligibility Edit Screen

DEMO

DEMO

DEMO

DEMO

DEMO

DEMO

DEMO

Jack B Flash Insurance

Source *	Type	Pending	Prim Ins	Prim HIV Ins	Carrier	Policy #	Start Date *	End Date *	Mo. Premium	Note	
No insurance	No Insurance	No	No	No			1/1/2010	12/31/2011			Edit
Public 1	LIHP	No	No	No	Health Choice	123456789	1/1/2012	1/31/2012	\$100.00	Job raise	Edit
No insurance	No Insurance	No	No	No			2/1/2012				Edit
											New

[Save + Next >](#) [Save + Done](#) [Cancel](#)

Edit record and enter an "End Date"...

...and create a new "No insurance" record

[Contact Information](#)

When entering insurance data...

- Ensure that every client—including those without insurance—has at least one insurance record entered in ARIES.
- Enter a “Start Date” for every insurance record.
- Only enter an “End Date” for insurance that has been terminated or lapsed.

Cleaning up insurance data...

- We hope these guidelines help improve data quality moving forward.
- However, some of your records may need attention. We have designed a fix-it report that will help you find records in your agency that need corrected and/or updated insurance data.

The Fix-It Insurance Report

- We will now demonstrate how to run the Insurance Fix-it Report.
- This report will list your clients served within a specified date range along with specific error messages that relate to insurance information.

To locate the **Fix-It: Insurance** report, go to Reports and select the **Client** menu.

The screenshot shows a web application interface with a navigation menu. The menu items are: < Back, Home, Find, New, Reports, Shortcuts, Help, Logout. The 'Reports' menu is open, showing options: Client, Services, Finance, Management, Cross Tab Wizard, Compliance. A red arrow points to the 'Client' option. A blue callout box contains the text: 'Click on "Client" under "Reports"'. The interface also features a 'DEMO' banner, a 'CONTACT INFO' button, and a 'CONTACT INFORMATION' section.

Jack B Flash

Contact Information [Edit](#)

Phones:

530-889-2437 (Work) -- do not contact; be confidential; no messages

Residence:

as of 1/1/2001
1234 Grass Valley Hwy
Auburn, CA 95603
County: Placer
Geog Area/HSDA:

Previous Address:

as of 1/1/2001
1234 Grass Valley Hwy
Auburn, CA 95603
County: Placer
Geog Area/HSDA:

[Contact Information](#)

Contact Information
Be confidential

Mailing Address:

1234 Grass Valley Hwy
Auburn, CA 95603
County: Placer
Geog Area/HSDA:

Emergency:

Jill Flash
1234 Grass Valley Hwy
Auburn, CA 95603
Phone 1: 530-889-2437
Phone 2:
be confidential; no messages

The **Fix-It: Insurance** report is located at the bottom of the Client report page.

[FTA/OA: Residential Address](#)

List of clients served by agency with indicators of residential address quality, with a service date filter. Export as XML and save as "Address.xml"

[Fix-It: Residential Address](#)

Lists clients served within a date range, and any problems with residential address

[CD4 Test Report](#)

[Fix-It: Eligibility Documents](#)

Lists clients served within a date range and whether there is a Diagnosis Document at ANY agency (not required for R/A) and an ARIES Consent Form at THIS agency not more than 1 year old.

[ARIES ID and Primary Staff Person](#)

Lists all clients by ARIES ID including the name of the Primary Staff Person

[Fix-It: CD4 and Viral Load](#)

Lists clients served within a date range and any problems with CD4 tests or Viral Load tests

[RSR Enrollment Status](#)

Click on "Fix-It: Insurance"

and how that status will be Range that matches your RSR White Funded. The report lists all

[Fix-It: Insurance](#)

clients served, those with an Unknown RSR Status are listed first. Lists clients served within a date range and any problems with Insurance.

Click on the report to run. Input your specified dates on the Report Filter Value page.

DEMO DEMO DEMO DEMO DEMO

Report Filter Values
Fix-It: Insurance

Service Line Item Service Date
Display

Between 1/31/2011 & 2/1/2012

1000 results Display print format

Report > Export

Enter service filter dates.

Enter the number of records to display.

When done, click "Report"

[Contact Information](#)

Sample Fix-It: Insurance Report

DEMO

DEMO

DEMO

DEMO

DEMO

DEMO

Fix-It: Insurance

ARIES ID	Client	Errors
100037399	Button, Benjamin B	Unknown/Unreportable Source
100014513	Smith, Adam F	No Insurance Records
100000850	Ashton, Zack J	No Insurance Records
100017367	Berkington, Geoffrey F	No Current Insurance Records, Unknown/Unreportable Source
100002393	Jones, Zack F	No Current Insurance Records, Unknown/Unreportable Source
100013051	Charles, Raymond H	No Current Insurance Records, Unknown/Unreportable Source
100017441	Exweb, Sally X	No Current Insurance Records, Missing Start Dates, Unknown/Unreportable Source
100017359	Exweb, Steve X	
100038918	Flash, Jack B	
100040914	Flintstone, Fredrick F	
100003276	Berry, Keera K	
100037472	Bevins, Paula F	
100014984	Box, Jack N	
100038926	Doe, John B	

Fix-It: Insurance Report Error Messages

Message	Meaning
No Insurance Records	No insurance records have ever been entered for this client
No Current Insurance Records	No insurance records cover any portion of the last year
Missing Start Dates	One of more insurance records with a blank Start Date were entered within the past year
Unknown/Unreportable Source	There are <u>no</u> Insurance records covering any portion of the last 365 days since the report <u>run date</u> that have one of the following Sources: Medi-Cal/Medicaid, Medicare, No insurance, Other, Other public insurance, Private 1/2/3, Public 1/, Veteran. These are the Insurance Sources that are reported as "known" values on the RSR (see "RSR Calculations 2009.xls").

Reportable vs. Unreportable Insurance Sources

Reportable	Unreportable*
Medi-Cal/Medicaid	ADAP
Medicare	Dental
No insurance	Vision
Other	
Other public insurance	
Private 1/2/3	
Public 1/2/3	
Veteran	

***NOTE:** for “Unreportable” records, enter either a verified “Reportable” Source, or enter “Unknown” if the source is truly unknown.

Next Steps: Running the Fix-It Report

- Please run the report.
- Look up the clients with error messages using their ARIES ID.
- Locate and/or gather the necessary documents referenced in the error message.
- Then update ARIES accordingly.

Low Income Health Program

(from the Dec 2011 *ARIES Advisor*)

"LIHP," which stands for the Low Income Health Program, has been added to the Type drop-down on the Insurance screen. For Ryan White clients who are enrolled in LIHP, it is important that providers update their insurance records in ARIES.

- To add a LIHP insurance record, the provider must create new insurance record, select "Public 1" as the Source, select "LIHP" as the Type, and enter the Start Date.
- If the client has an existing "No Insurance" record, the provider must edit that record by adding an End Date (i.e., the day before LIHP coverage begins).

Questions & Answers

- Do you have any questions?
- Additional Resources:
 - This presentation will be posted in the Training section of www.projectaries.org.
 - The **ARIES User Manual** can be accessed by pressing the F1 button while in ARIES.
 - The ARIES Help Desk can be reached at **866-411-ARIES (2743)**.
 - **ARIES Policy Notice C4—Insurance** available at www.projectaries.org

Thank you!

- Thank you for participating! We hope that this has been a productive use of your time.
- Together we can improve ARIES data quality!