

nH Access™

User Guide

Version 3.1

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Overview

nH Access streamlines the information exchange workflow between naviHealth and both acute and post-acute care providers through a secure, easy-to-use web portal which facilitates improved care decisions for naviHealth-managed patients. Through this web portal, you will be able to submit authorization requests for your patients, securely provide clinical patient information, and communicate directly with naviHealth clinicians.

nH Access also enables real-time, two-way document sharing. Not only can you view the documents you have uploaded for your patients, but you will also be able to review and download documents shared with you by naviHealth clinicians, such as authorization letters and **nH Predict | Outcome** reports.

Browser Requirements

Supported internet browsers for **nH Access** are listed below:

- Microsoft Internet Explorer 11
- Microsoft Edge
- Google Chrome (latest version preferred)
- Mozilla Firefox (latest version preferred)
- Apple Safari (latest version preferred)

nH Access Support

For technical support, please contact naviHealth Customer Support:

- support.nHAccess@naviHealth.com
- 1-888-276-5777

This information may also be displayed within **nH Access** by clicking the **Support, Terms & Conditions, and Privacy Policy** link at the bottom of the screen.

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Getting Started

Logging Into nH Access

HEALTH PLAN PORTAL SINGLE SIGN-ON (SSO)

Health plan portal SSO is the preferred method for logging into **nH Access** if you only have patients from one naviHealth-managed health plan in your facility.

Log into the health plan's web portal and follow the instructions provided by the health plan to open **nH Access**.

DIRECT LOGIN

Direct login accounts may be used if you do not have SSO access to a health plan portal or if you have patients from multiple naviHealth-managed health plans in your facility. These accounts must be created by naviHealth Technical Support. Click [here](#) to initiate the process. Allow 3-5 business days for access to be granted.

To use your direct login account, open your internet browser and navigate to <https://access.naviHealth.com>.

Enter your username and password provided to you by naviHealth in the displayed Login Screen.

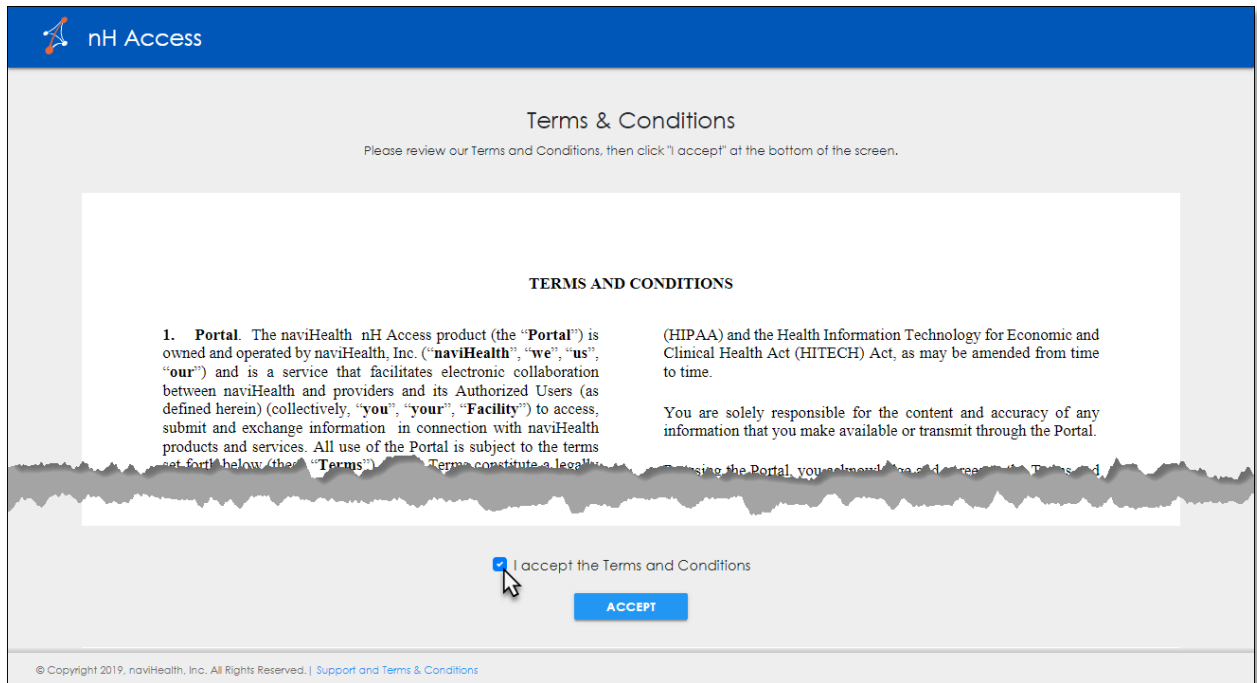
LOGIN ERRORS

If your login is unsuccessful, an error message will display prompting you to contact naviHealth Customer Support (see [nH Access Support](#)). Be prepared to supply your facility's NPI number as part of the troubleshooting process.

Terms and Conditions

The Terms & Conditions Screen will automatically display the first time you log in, and all users must agree to these terms in order to use **nH Access**.

Check the check box at the bottom of the screen and click **Accept**, and you will be redirected to the main dashboard.

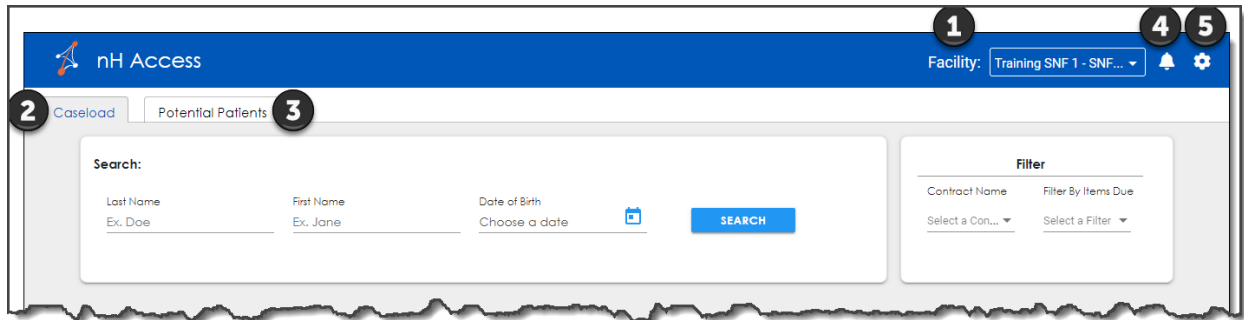




The Terms and Conditions document may be reviewed at any time by clicking the **Support, Terms & Conditions, and Privacy Policy** link at the bottom of the screen.



Navigation

The main **nH Access** dashboard will display upon login. The main components of this dashboard are described below.



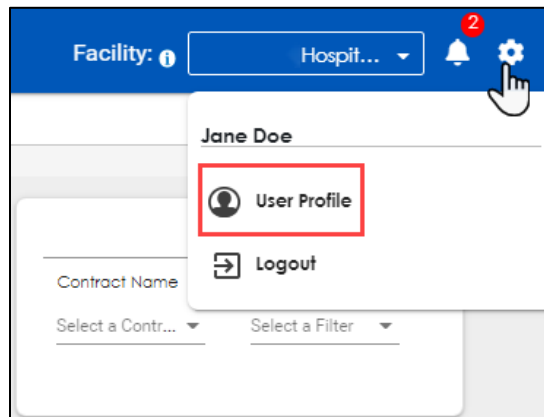
1. The **Facility** drop-down allows you to select which facility's caseload you wish to display. Your home facility will be selected by default, but you will be able to select any facility for which you are authorized to manage cases.
2. The **Caseload** tab displays a listing of the selected facility's naviHealth-managed patients. This tab will display by default upon login. For more information, see [Caseload Screen](#).
NOTE: If you log in using a health plan's SSO portal, you will ONLY see the naviHealth-managed patients who are members of the corresponding health plan.
3. The **Potential Patients** tab provides access to naviHealth-managed patients who are NOT displayed on your caseload but may need an authorization for post-acute care. For more information, see [Potential Patients Screen](#).
4. The Notifications icon  indicates if new messages have been received from naviHealth clinicians regarding your patients. For more information, see [Receiving Messages](#).
5. Click the Gear icon  and select **Logout** to log out of **nH Access** or click **User Profile** to enable email alerts.

Setting Up Email Alerts

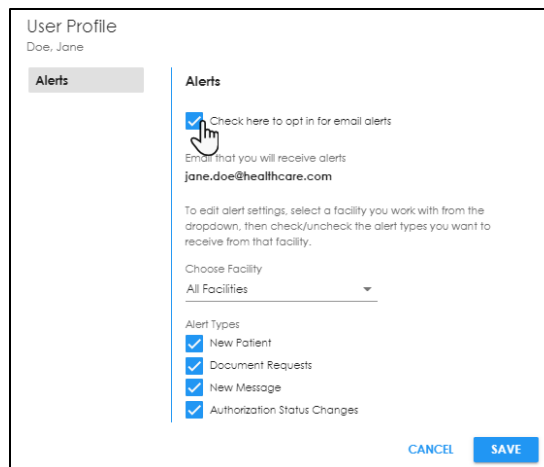
Email alerts will notify you when specific updates are made by naviHealth regarding patient transfers, authorization status, document requests, and case communication. Follow the steps below to opt in for email alerts and customize your settings.

NOTE: Email alerts are not mandatory. Select the settings that are most useful to your needs.

1. Click the Gear icon and select **User Profile**.



2. Click the checkbox under Alerts to opt in for email alerts. The emails will be sent to the email address used to create your **nH Access** account.
3. Under **Choose Facility** you can choose to receive email alerts for all facilities where you manage patients or only pick a select few.

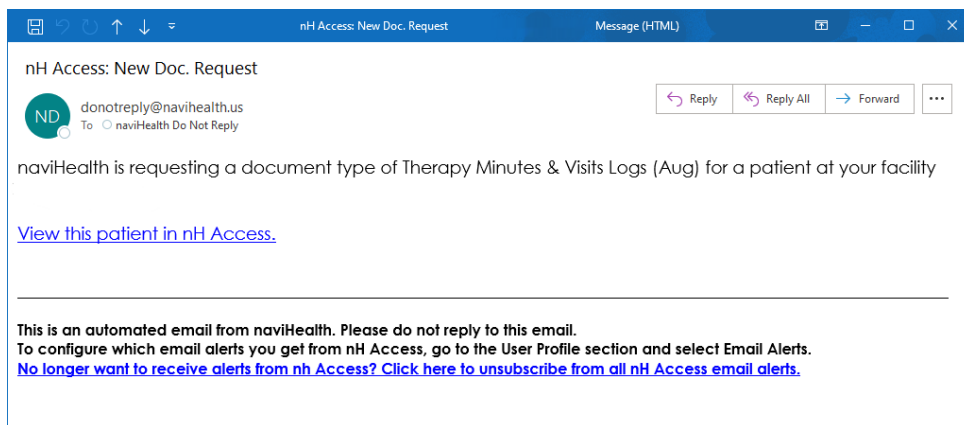


4. When you are finished, click **SAVE**.

NOTE: You will notice there are four different types of alerts. You may select as many or as few as needed.

- **New Patient:** This alert is sent when a new patient is approved to be transferred to your facility.
- **Document Requests:** This alert is sent when naviHealth is requesting additional clinical for a patient.
- **New Message:** This alert is sent when naviHealth sends a message to your facility through **nH Access** case communication.
- **Authorization Status Changes:** This alert is sent when an authorization status has changed for a patient at your facility.

Email alerts will display similar to the example below. Click **View this patient in nH Access** to be redirected to the patient’s profile. If you are not already logged in to the application, you will be asked to log in prior to viewing the patient’s profile.

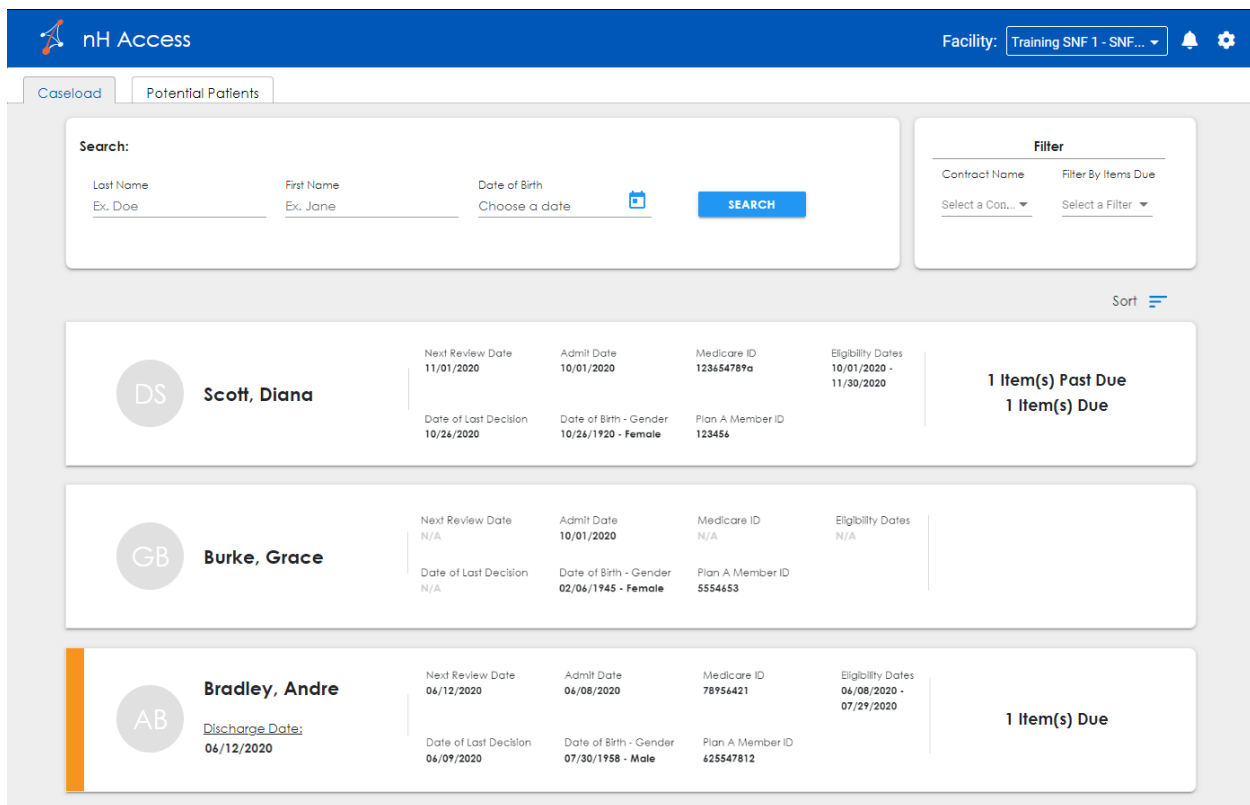


You may edit your email alert settings at any time within your User Profile. If you would like to unsubscribe from all email alerts, then select **Click here to unsubscribe from all nH Access email alerts** at the bottom of an email alert message in your inbox.

Caseload Screen

The Caseload Screen displays by default upon login and may be accessed at any time by clicking the **Caseload** tab. This screen provides access to naviHealth-managed patients at the selected facility, and search tools are also available to help you easily locate specific patients.

NOTE: For acute facilities, patients will display once naviHealth receives their admission information from the patient's health plan. If a naviHealth-managed patient is not listed, try searching for that patient on the [Potential Patients](#) tab.



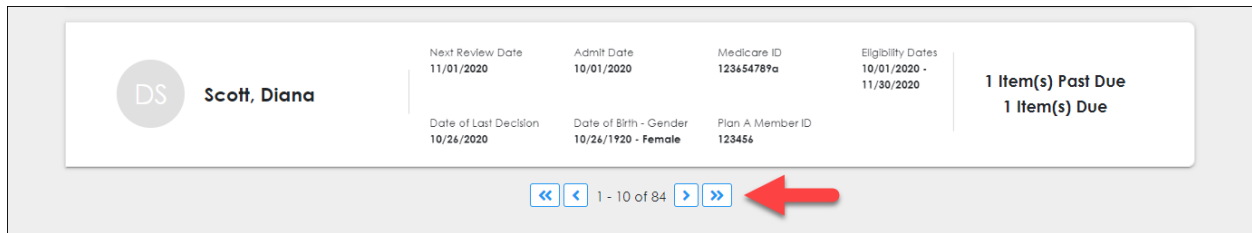
The screenshot shows the nH Access interface for the 'Caseload' tab at 'Training SNF 1 - SNF...'. It features a search bar with fields for Last Name (Ex. Doe), First Name (Ex. Jane), and Date of Birth (Choose a date), along with a 'SEARCH' button. A 'Filter' section allows selection of Contract Name and Filter By Items Due. A 'Sort' option is also present. The main area displays three patient cards:

Initials	Name	Next Review Date	Admit Date	Medicare ID	Eligibility Dates	Items Due
DS	Scott, Diana	11/01/2020	10/01/2020	123654789a	10/01/2020 - 11/30/2020	1 Item(s) Past Due 1 Item(s) Due
GB	Burke, Grace	N/A	10/01/2020	N/A	N/A	
AB	Bradley, Andre	06/12/2020	04/08/2020	78956421	06/08/2020 - 07/29/2020	1 Item(s) Due

Additional details for Bradley, Andre include a Discharge Date of 06/12/2020, Date of Last Decision of 06/09/2020, Date of Birth - Gender of 07/30/1958 - Male, and Plan A Member ID of 625547812.

Patient List


The patient list is ordered by admission date with the most recently admitted patients at the top. The total number of patients will display in the upper right of the listing, but only ten patients will display at a time. Paging controls at the bottom of the list may be used to navigate through the patient list.



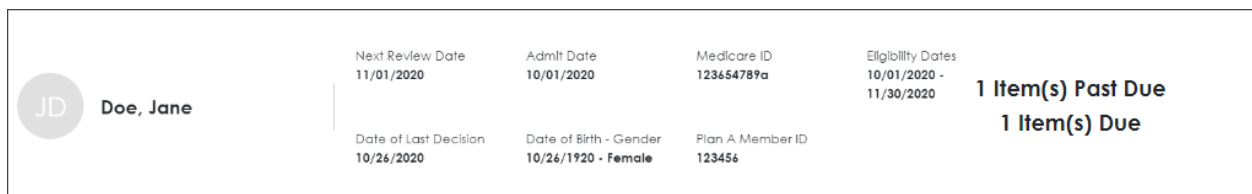
DS **Scott, Diana**

Next Review Date 11/01/2020	Admit Date 10/01/2020	Medicare ID 123654789a	Eligibility Dates 10/01/2020 - 11/30/2020
Date of Last Decision 10/26/2020	Date of Birth - Gender 10/26/1920 - Female	Plan A Member ID 123456	

1 Item(s) Past Due
1 Item(s) Due

<< < 1 - 10 of 84 > >> 

A "card" will display for each patient listed. This card will display each patient's name and key demographics to help you quickly identify specific patients. The number of outstanding documents requested by naviHealth for each patient will also display.



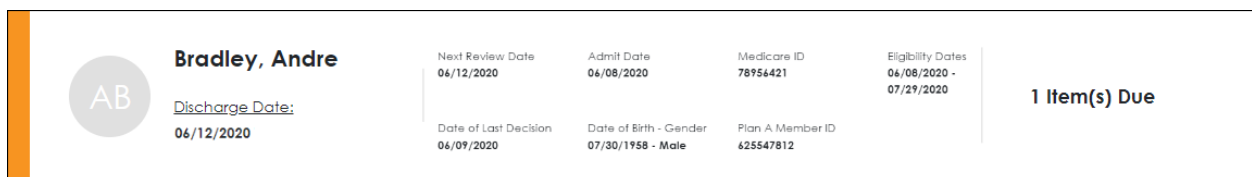
JD **Doe, Jane**

Next Review Date 11/01/2020	Admit Date 10/01/2020	Medicare ID 123654789a	Eligibility Dates 10/01/2020 - 11/30/2020
Date of Last Decision 10/26/2020	Date of Birth - Gender 10/26/1920 - Female	Plan A Member ID 123456	

1 Item(s) Past Due
1 Item(s) Due

For acute facilities, only current patients will display in the caseload. Discharged patients will NOT display.

For post-acute facilities, discharged patients will continue to display in the caseload until naviHealth has received all necessary documents, such as discharge summaries and therapy logs, and closed the case. Discharged patient cards will display an **orange** bar on the left side, and the discharge date will display beneath the patient's name.



AB **Bradley, Andre**

Discharge Date:
06/12/2020

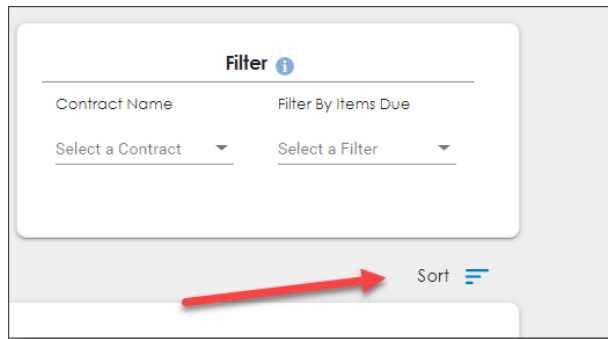
Next Review Date 06/12/2020	Admit Date 06/08/2020	Medicare ID 78954421	Eligibility Dates 06/08/2020 - 07/29/2020
Date of Last Decision 06/09/2020	Date of Birth - Gender 07/30/1958 - Male	Plan A Member ID 625547812	

1 Item(s) Due

Click any card to open the [Patient Screen](#) to submit and review authorization requests, communicate with naviHealth, or view patient documentation.

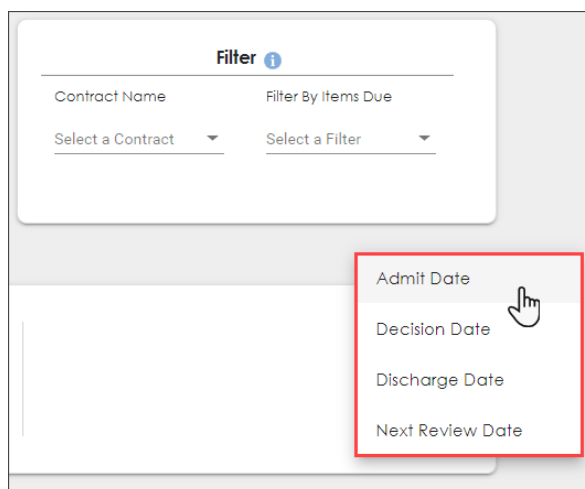
Sorting Feature

The **Sort** feature on the right-hand side of your Caseload will allow you to sort patients by Admit Date, Decision Date, Discharge Date, and Next Review Date.



Select which sorting feature works best for your search.

- **Admit Date** will sort the caseload by the most recently admitted patients.
- **Decision Date** will sort the caseload by the patients with the most recent decision. This date comes from the most recently created authorization detail on the most recently created Open or Pending authorization.
- **Discharge Date** will sort the caseload by the most recently discharged patients, followed by the most recently admitted patients. These records will show for SNF facilities ONLY.
NOTE: Discharge Date displays for patients who have discharged **AND** whose Minimum Data Set (MDS) is incomplete.
- **Next Review Date** will sort the caseload by the patient with the next upcoming review date. Patients without a review date will follow these patients in admit date order.

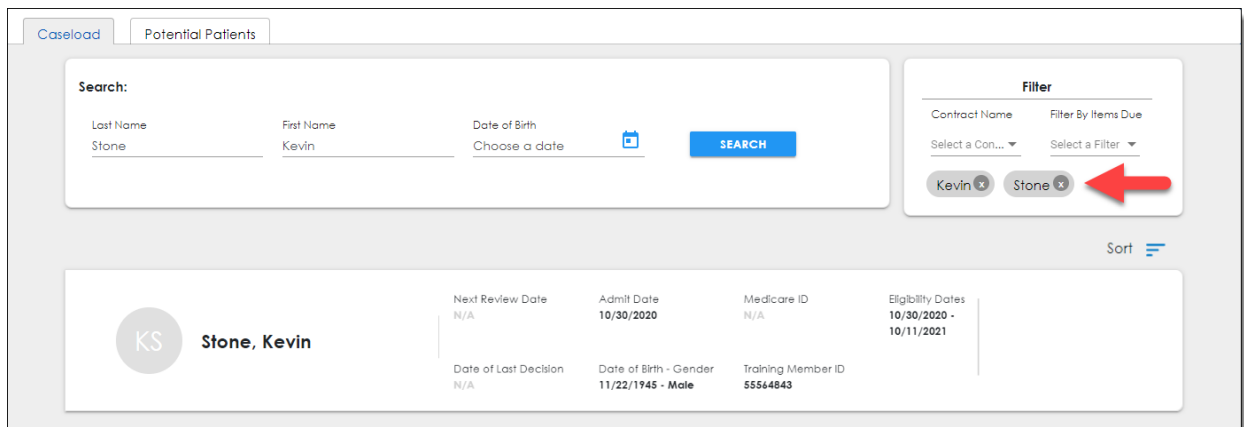


Patient Search

The Search tools at the top of the Caseload tab may be used to quickly locate a specific patient. To search for a patient, enter the patient's first name, last name, and/or date of birth and click **Search**.

RESULT:

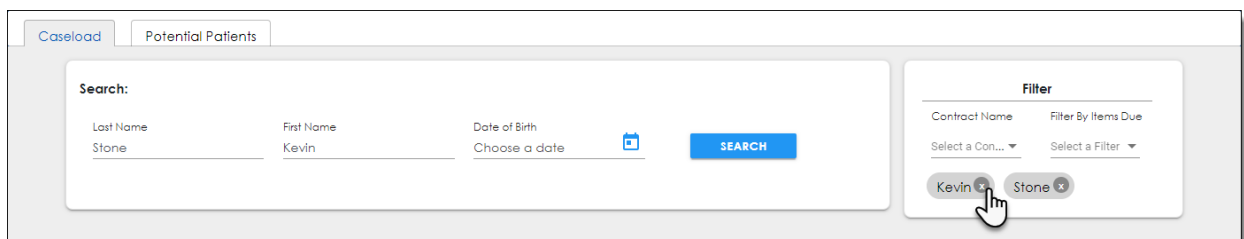
- Each search criterion entered will display to the right of the search box.
- Only the patients matching the search criteria will display in the patient list.
- If the patient is not found within your Caseload, a message will display directing you to search for the patient within the Potential Patients tab.



The screenshot shows the 'Potential Patients' tab selected. The search criteria are: Last Name: Stone, First Name: Kevin, Date of Birth: Choose a date. The 'Filter' section shows 'Kevin' and 'Stone' selected, with a red arrow pointing to the 'X' next to 'Stone'. Below the search box is a patient result card for Kevin Stone with the following details:

KS Stone, Kevin	Next Review Date	Admit Date	Medicare ID	Eligibility Dates
	N/A	10/30/2020	N/A	10/30/2020 - 10/11/2021
	Date of Last Decision	Date of Birth - Gender	Training Member ID	
	N/A	11/22/1945 - Male	55544843	

To remove search criteria, click the 'X' next to the keyword you wish to remove. The patient list will refresh to reflect either the full list or any remaining search criteria.



This screenshot shows the same search interface as above, but with a hand cursor clicking the 'X' next to 'Stone' in the filter section to remove it.

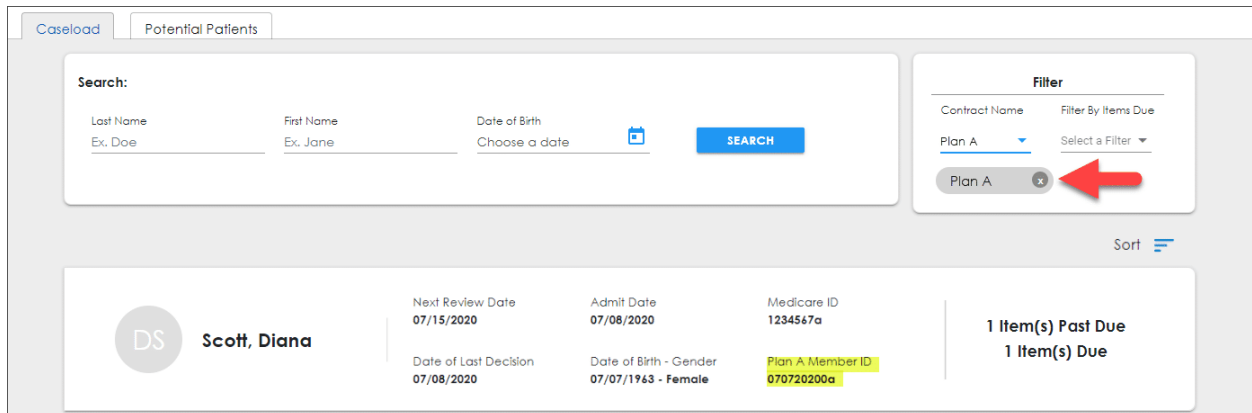
Patient Filters

The **Filter** section may be used to quickly locate specific groups of patients. When a filter is applied, the selected filter will display below the filter drop-down.

FILTERING BY CONTRACT NAME

Use the **Contract Name** filter to display patients who are members of the selected health plan.

NOTE: If you log into **nH Access** using a health plan SSO portal, your patient list will already display **ONLY** patients who are members of that health plan.



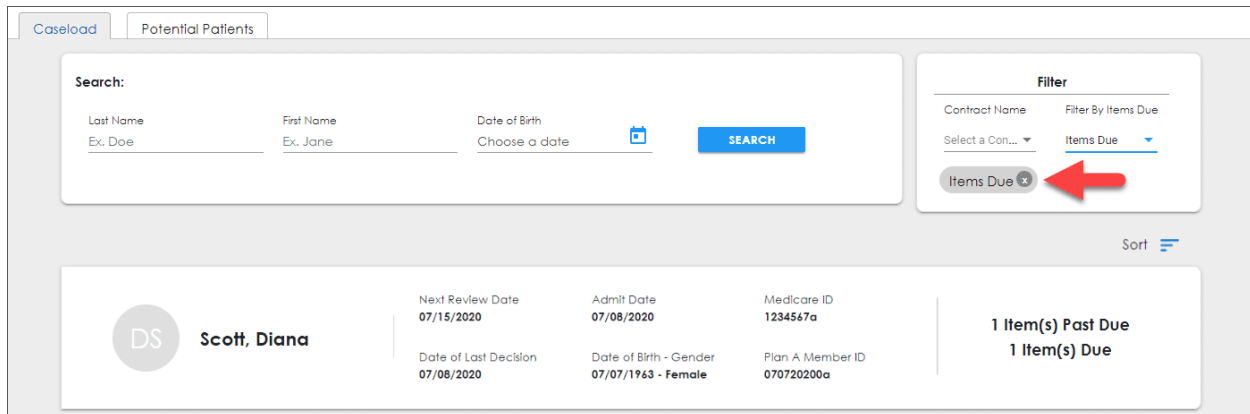
The screenshot shows the 'Potential Patients' tab in the naviHealth interface. On the left is a search form with fields for Last Name (Ex. Doe), First Name (Ex. Jane), and Date of Birth (Choose a date), and a blue 'SEARCH' button. On the right is a 'Filter' section with two tabs: 'Contract Name' and 'Filter By Items Due'. Under 'Contract Name', a dropdown menu shows 'Plan A' selected. Below the dropdown is a grey tag with 'Plan A' and a close button (x), with a red arrow pointing to it. Below the filter section is a 'Sort' button with a menu icon. The main patient list area shows a card for 'Scott, Diana' with a 'DS' icon. The card contains the following information:

Next Review Date 07/15/2020	Admit Date 07/08/2020	Medicare ID 1234567a	1 Item(s) Past Due 1 Item(s) Due
Date of Last Decision 07/08/2020	Date of Birth - Gender 07/07/1963 - Female	Plan A Member ID 070720200a	


FILTERING BY ITEMS DUE

Use the **Items Due** filter to display patients for whom a naviHealth clinician has requested documents.

- Select **Items Due** to display patients with any outstanding document requests.
- Select **Items Overdue** to only display patients with past due document requests.



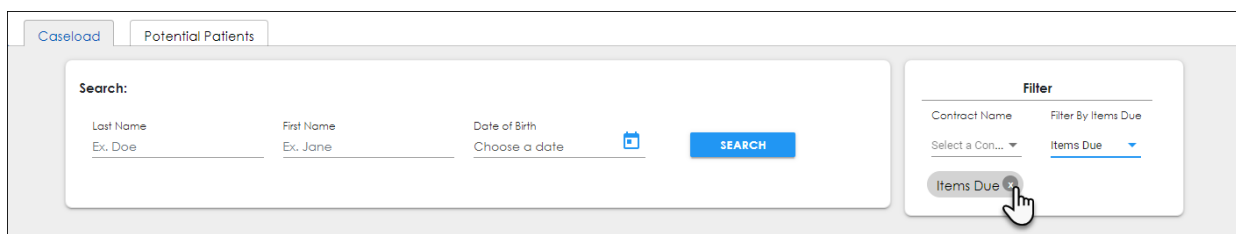
The screenshot shows the 'Potential Patients' tab in the naviHealth interface. A search bar is visible with fields for Last Name (Ex. Doe), First Name (Ex. Jane), and Date of Birth (Choose a date). A 'SEARCH' button is present. To the right, a 'Filter' section shows 'Filter By Items Due' selected. Below this, a patient card for 'Scott, Diana' is displayed with the following details:

 Scott, Diana	Next Review Date 07/15/2020	Admit Date 07/08/2020	Medicare ID 1234567a
	Date of Last Decision 07/08/2020	Date of Birth - Gender 07/07/1963 - Female	Plan A Member ID 070720200a

On the right side of the patient card, a summary box indicates: '1 Item(s) Past Due' and '1 Item(s) Due'. A red arrow points to the 'Items Due' filter button in the filter section.

REMOVING A FILTER

To remove a filter and display the full patient list, click the 'X' next to filter.

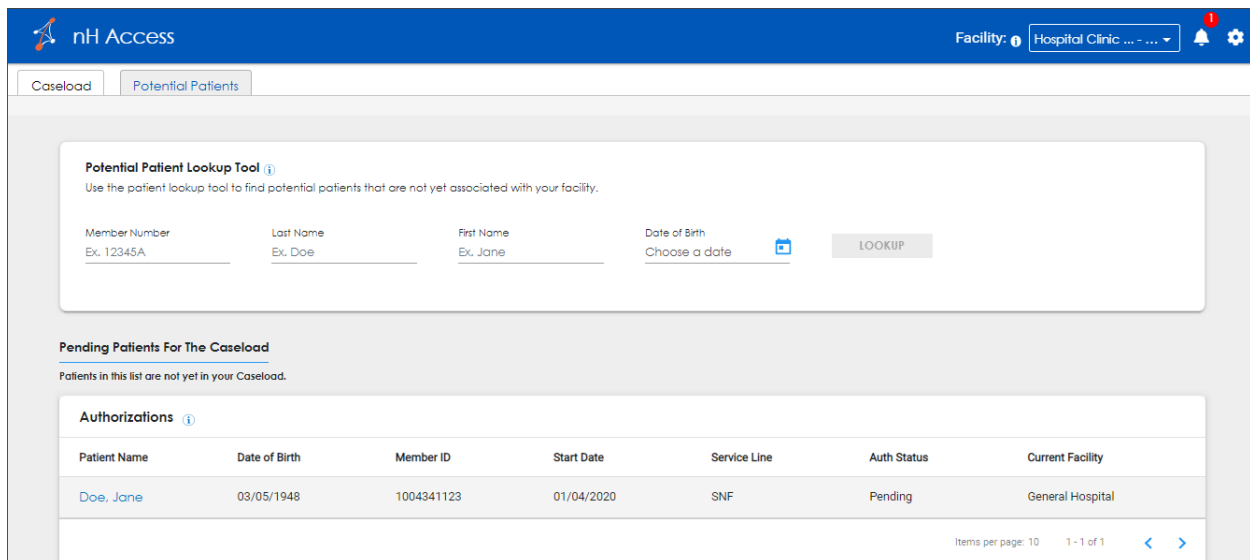


This screenshot shows the same interface as the previous one, but with a mouse cursor hovering over the 'X' icon next to the 'Items Due' filter button in the filter section, indicating the action to remove the filter.

Potential Patients Screen

The Potential Patients Screen may be displayed at any time by clicking the **Potential Patients** tab.

- This screen allows acute providers to access patients currently in their facility who do not yet display on their Caseload tab.
- This screen allows post-acute providers to access patients who may be transitioning to their facility but have not yet been admitted.
- If a pending patient appears in the Authorizations section, click the patient name to access the pending authorization.



The screenshot shows the nH Access interface. At the top, there is a blue header with the nH Access logo on the left and a 'Facility:' dropdown menu set to 'Hospital Clinic ...' on the right. Below the header, there are two tabs: 'Caseload' and 'Potential Patients', with 'Potential Patients' being the active tab. The main content area is divided into two sections. The first section is titled 'Potential Patient Lookup Tool' and includes a sub-header 'Use the patient lookup tool to find potential patients that are not yet associated with your facility.' Below this, there are four input fields: 'Member Number' (with 'Ex. 12345A'), 'Last Name' (with 'Ex. Doe'), 'First Name' (with 'Ex. Jane'), and 'Date of Birth' (with 'Choose a date' and a calendar icon). A 'LOOKUP' button is positioned to the right of these fields. The second section is titled 'Pending Patients For The Caseload' and includes a sub-header 'Patients in this list are not yet in your Caseload.' Below this, there is a table titled 'Authorizations' with the following data:

Patient Name	Date of Birth	Member ID	Start Date	Service Line	Auth Status	Current Facility
Doe, Jane	03/05/1948	1004341123	01/04/2020	SNF	Pending	General Hospital

At the bottom right of the table, there is a pagination control showing 'Items per page: 10' and '1 - 1 of 1' with navigation arrows.

Potential Patient Lookup Tool


The Potential Patient Lookup Tool may be used to locate patients who are in your facility but not displayed on your caseload or patients not yet associated with your facility. For example, you may be notified that a patient will be transitioning to your facility, and you need to locate that patient to submit an initial authorization request.

To look up a patient, you **MUST** enter the patient's **Member Number**, **Last Name**, **First Name**, and **Date of Birth**. Click **Lookup** to complete the search.


RESULT:

- If the matching patient is located and naviHealth has an active record for that patient, the patient card will display below the search fields. Click the card to open the [Patient Screen](#), where you can submit authorization requests or view the patient's authorization history and documentation.

Potential Patient Lookup Tool
Use the patient lookup tool to find potential patients that are not yet associated with your facility.


Member Number 004005006	Last Name Palmer	First Name Peter	Date of Birth 1/8/1954		LOOKUP
----------------------------	---------------------	---------------------	---------------------------	--	--

Patient Lookup Results:


 Palmer, Peter	Next Review Date N/A	Admit Date 01/03/2020	Medicare ID N/A	Eligibility Dates N/A
	Date of Last Decision N/A	Date of Birth - Gender 01/08/1954 - Male	Health Plan Member ID 004005006	

- If the matching patient is found but naviHealth does not yet have an active record for that patient, you will not be able to open the Patient Screen. However, you may still submit an authorization request for that patient by clicking **Request Initial Auth**. See [Submitting Initial Requests from Potential Patients](#) for more information.

Potential Patient Lookup Tool
Use the patient lookup tool to find potential patients that are not yet associated with your facility.


Member Number 004005006	Last Name Palmer	First Name Peter	Date of Birth 1/8/1954		LOOKUP
----------------------------	---------------------	---------------------	---------------------------	--	---------------

Patient Lookup Results:

 Palmer, Peter	Next Review Date N/A	Admit Date 01/03/2020	Medicare ID N/A	Eligibility Dates N/A	REQUEST INITIAL AUTH
	Date of Last Decision N/A	Date of Birth - Gender 01/08/1954 - Male	Health Plan Member ID 004005006		

- A notification will display if no matching patients are found.

Potential Patient Lookup Tool
Use the patient lookup tool to find potential patients that are not yet associated with your facility.

Member Number 123456789	Last Name Doe	First Name John	Date of Birth 1/1/1945		LOOKUP
----------------------------	------------------	--------------------	---------------------------	--	---------------

Patient Lookup Results:

No patient record was found matching these identifiers. Please verify the patient's health plan coverage and their memberID.
If you think this is in error, please contact naviHealth using the number provided to you for that patient's health plan.

Pending Patients for the Caseload

The Pending Patients for the Caseload list displays patients who are not yet in your caseload but have pending or approved initial authorizations for your facility. Once a patient admits to your facility and displays on your caseload, that patient will no longer appear in this list.

Pending Patients For The Caseload							
Patients in this list are not yet in your Caseload.							
Authorizations ⓘ							
Patient Name	Date of Birth	Member ID	Start Date	Service Line	1 Auth Status	Current Facility	
Doe, Jane	03/05/1948	1004341123	01/04/2020	SNF	Pending	General Hospital	
						2 Items per page: 10 1 - 1 of 1 < >	

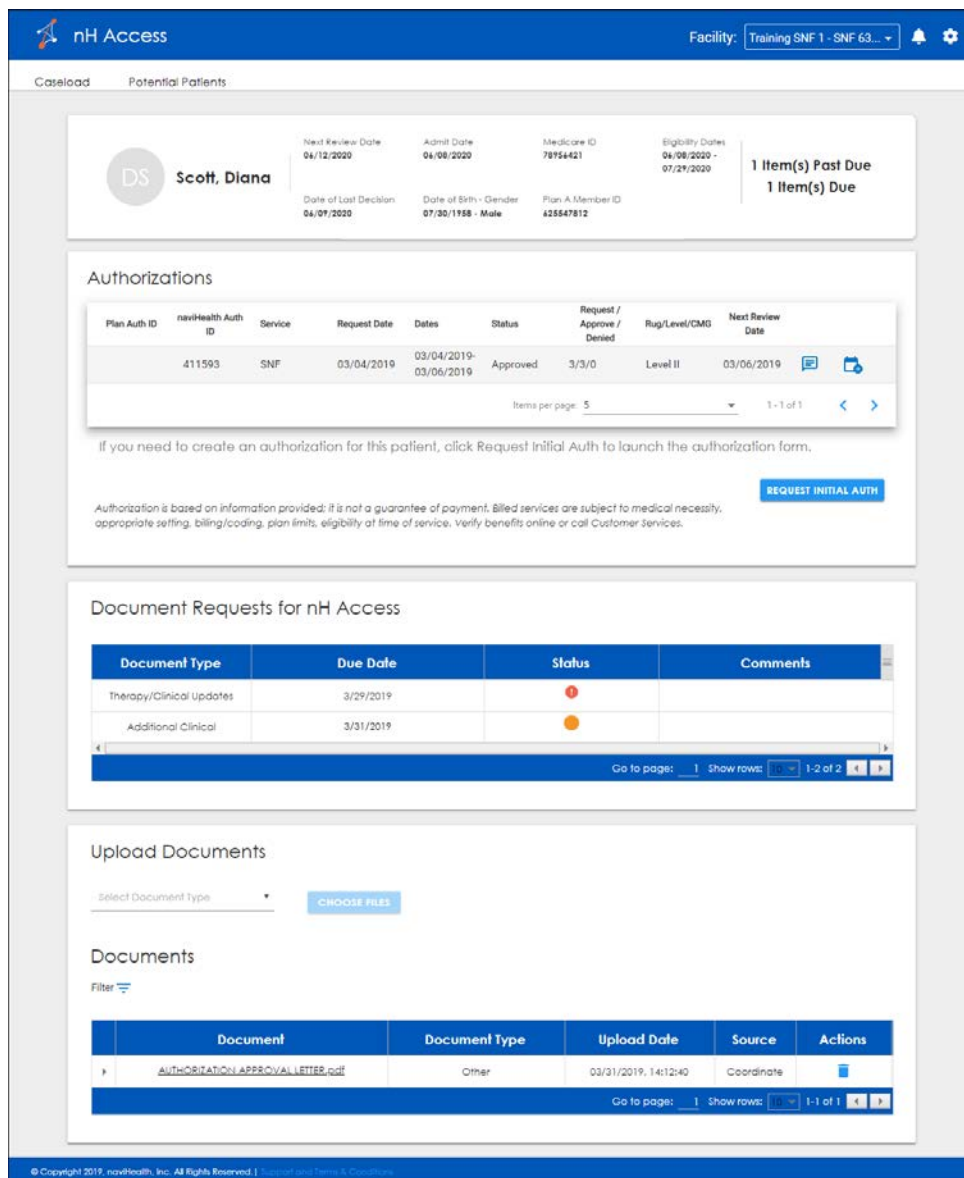
- The following **Auth Status** values will display in this list:
 - Pending** – The initial authorization request has been submitted, but naviHealth has not yet made the determination.
 - Approved** – The initial authorization request has been approved, and the patient is expected to admit to your facility on the listed start date.
 - Approved-Hold** – The initial authorization request has been approved, but the date the patient will transition to your facility (the start date) is subject to change based on the patient’s needs.
- Paging controls at the bottom of the list may be used to navigate through the list, and you may also set the number of patients displayed per page within the list.

NOTE: If you need to review the information for a patient in the Pending Patients list, use the [Potential Patient Lookup Tool](#) to search for the patient and display his/her card, which may be clicked to open the Patient Screen.

Patient Screen

The Patient Screen provides an efficient, centralized place to view authorization history, communicate with naviHealth clinicians, and manage documentation shared with naviHealth.

The Patient Screen may be opened by clicking a patient card either on the Caseload Screen or in the Potential Patients Lookup results. That same card will display at the top of the Patient Screen.



The screenshot shows the nH Access interface for a patient named Diana Scott. The top navigation bar includes 'nH Access' and 'Facility: Training SNF 1 - SNF 63...'. Below the navigation, there are tabs for 'Caseload' and 'Potential Patients'. The patient's profile card displays the following information:

- Next Review Date:** 04/12/2020
- Admit Date:** 04/08/2020
- Medicare ID:** 78954421
- Eligibility Dates:** 04/08/2020 - 07/29/2020
- Date of Last Decision:** 04/07/2020
- Date of Birth - Gender:** 07/30/1958 - Male
- Plan A Member ID:** 425547812

There are 1 Item(s) Past Due and 1 Item(s) Due. The 'Authorizations' section contains a table with one entry:

Plan Auth ID	naviHealth Auth ID	Service	Request Date	Dates	Status	Request / Approve / Denied	Rug/Level/CMG	Next Review Date
411593		SNF	03/04/2019	03/04/2019-03/06/2019	Approved	3/3/0	Level II	03/06/2019

Below the table, there is a 'REQUEST INITIAL AUTH' button and a disclaimer: 'Authorization is based on information provided; it is not a guarantee of payment. Billed services are subject to medical necessity, appropriate setting, billing/coding, plan limits, eligibility at time of service. Verify benefits online or call Customer Services.'

The 'Document Requests for nH Access' section shows a table with two entries:

Document Type	Due Date	Status	Comments
Therapy/Clinical Updates	3/29/2019	Red dot	
Additional Clinical	3/31/2019	Yellow dot	



The 'Upload Documents' section includes a 'Select Document Type' dropdown and a 'CHOOSE FILES' button. Below, the 'Documents' section shows a table with one entry:

Document	Document Type	Upload Date	Source	Actions
AUTHORIZATION APPROVAL LETTERS.pdf	Other	03/31/2019, 14:12:40	Coordinate	

At the bottom of the page, there is a copyright notice: '© Copyright 2019, naviHealth, Inc. All Rights Reserved. | Support and Terms & Conditions.'





Authorizations

The Authorizations section allows you to:

- Submit authorization requests.
 - Acute providers may submit initial requests for patients discharging to post-acute care.
 - Post-acute providers may submit initial requests for patients who will admit to their facility upon discharging from the hospital.
 - Post-acute providers may also submit continued stay requests (requests for more days) for current patients already in their facility who require additional days of care.
- Communicate with naviHealth clinicians about an authorization request.
- View authorizations status and history. The lines in the list correspond to the initial request and the subsequent continued stay requests (requests for additional days) with the most recent request at the top. Each line includes details such as:
 - Authorizations IDs (both health plan and naviHealth)
 - NOTE:** If the patient’s stay spans across multiple lines, the naviHealth Auth ID may be duplicated on each of those lines.
 - Start and end dates
 - Authorization status
 - Authorized RUG, Level, or Case Mix Groups
 - The Message icon  (see [Communicating with naviHealth](#))
 - The Continued Stay icon  (see [Submitting a Continued Stay Request](#))

Continued on next page

Authorizations

Plan Auth ID	naviHealth Auth ID	Service	Request Date	Dates	Status	Request / Approve / Denied	Rug/Level/CMG	Next Review Date	
	411676	SNF	03/11/2019	03/12/2019-03/16/2019	Approved	5/5/0	Level I	03/16/2019	 
	411676	SNF	03/06/2019	03/07/2019-03/11/2019	Approved	5/5/0	Level I	03/11/2019	 

Items per page: 5 1 - 3 of 3

If you need to create an authorization for this patient, click Request Initial Auth to launch the authorization form.

[REQUEST INITIAL AUTH](#)

Authorization is based on information provided; it is not a guarantee of payment. Billed services are subject to medical necessity, appropriate setting, billing/coding, plan limits, eligibility at time of service. Verify benefits online or call Customer Services.

If an authorization has not yet been submitted for this patient, only the **Request Initial Auth** button will display.

Authorizations

If you need to create an authorization for this patient, click Request Initial Auth to launch the authorization form.

[REQUEST INITIAL AUTH](#)

Authorization is based on information provided; it is not a guarantee of payment. Billed services are subject to medical necessity, appropriate setting, billing/coding, plan limits, eligibility at time of service. Verify benefits online or call Customer Services.

See [Submitting Authorization Requests](#) for more information.

NOTE: The Authorizations section will NOT display for naviHealth-managed patients covered by traditional Medicare or an ACO.

Document Management

The Document Requests and Upload Documents sections display below the Authorizations section. These two sections allow you to:

- View documents requested by naviHealth clinicians working the patient's case.
- Upload the requested documents.
- View a list of previously uploaded patient documents. This includes any documents uploaded by naviHealth clinicians.

Document Requests

Document Type	Due Date	Status	Comments
Therapy/Clinical Updates	3/29/2019	!	
Other	3/31/2019	●	Need AOR

Go to page: 1 Show rows: 10 1-2 of 2




Upload Documents

Select Document Type ▼

CHOOSE FILES

Documents

Filter ☰

	Document	Document Type	Upload Date	Source	Actions
▶	HISTORY AND PHYSICAL.pdf	Additional Clinical	09/25/2019, 10:27:13	Portal	
▶	THERAPY EVALUATIONS.pdf	Additional Clinical	09/25/2019, 10:27:16	Portal	
▶	PHYSICIAN ORDERS.pdf	Additional Clinical	09/25/2019, 10:27:16	Portal	

Go to page: 1 Show rows: 10 1-3 of 3

See [Managing Patient Documents](#) for more information.

Submitting Authorization Requests

Authorization Type Definitions

Initial Authorization Request – A new request for approval for a patient to admit to or receive services from a facility. There are three (3) types of initial authorization requests:

- **Prospective** – The patient has not yet admitted to the facility, and no services have been provided. This is the most common type of initial request.
- **Concurrent** – The patient has already been admitted to the facility and is currently receiving services, but a prospective authorization request was not submitted for this care.
- **Retrospective** – Services have already been provided and completed, and the patient has discharged from the facility, but neither a prospective nor a concurrent authorization request was submitted for this care.

Continued Stay Request - A request for additional days for a patient who already has an approved initial authorization for care. The patient has admitted and is currently receiving services.

Initial Authorization Requests

When a new authorization is needed, follow one of the two processes below to submit the initial authorization request and upload the supporting documentation required by naviHealth clinicians to make the determination.

- If the patient is listed in your caseload or you are able to access the Patient Screen by searching for the patient on the Potential Patients tab, initiate the request in the Authorizations section of the Patient Screen.
See [Submitting Initial Requests from the Patient Screen](#).
- If your search results on the Potential Patients tab display a Request Initial Auth button on the patient card, the Patient Screen is not yet available for that patient, and naviHealth needs some additional information about the patient's current care setting in order to set up the record. Click the displayed button to initiate the request.
See [Submitting Initial Requests from Potential Patients](#).

NOTE:

- Follow these processes when the patient has NOT yet been authorized to receive post-acute care or services.
- If the patient already has an approved authorization and you need to request more days, see [Submitting a Continued Stay Request](#).

SUBMITTING INITIAL REQUESTS FROM THE PATIENT SCREEN

Click **Request Initial Auth** in the Authorizations section of the Patient Screen to display the Authorization Request form.



The screenshot shows a window titled "Authorization Request" with a close button (x) in the top right corner. Inside the window, there is a section titled "Intake" containing four input fields: "Requester Name", "Sample User", "Phone", and "Fax". Each field has a horizontal line below it, indicating it is a text input field.

This form is divided into three (3) sections:

- Intake
- Provider Details
- Document Check List / Upload Documents

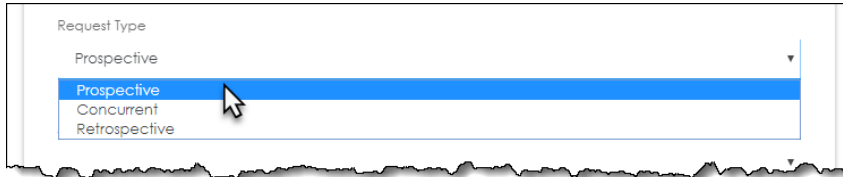
Follow the steps below to complete each section and submit the request. The steps are numbered continuously to guide you top-down through the form.

Complete the Intake Section

1. Verify the **Requester Name**. Your name will display by default.
2. Enter your **Phone** number.
3. Enter your **Fax** number (optional).

Continued on next page

- Select the **Request Type**. (See [Authorization Type Definitions](#) if clarification is needed for the request type options.)



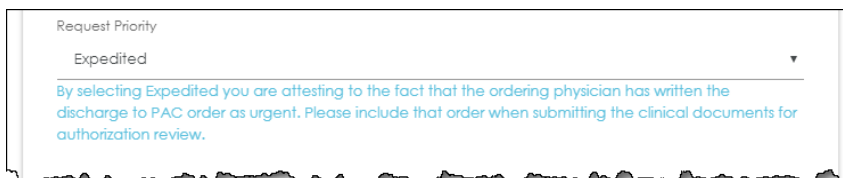
- **Prospective** (default) – The patient has not yet admitted to the facility.
- **Concurrent** – The patient is currently at the facility, but a prospective authorization was NOT submitted.
IMPORTANT: In **nH Access**, this does NOT refer to requests for additional days.
- **Retrospective** – The patient has discharged from the facility, but neither a prospective nor a concurrent authorization was submitted.

- Select the **Service** or level of care being requested for the patient. (Example: SNF)
NOTE: The only available options will correspond to the care settings which naviHealth manages for the patient’s health plan.

- Select the **Request Priority** if necessary. “Standard” will be selected by default.



NOTE: if “Expedited” is selected, a note will display clarifying what is needed for an expedited request.



- Enter the **Start Date** as the date the patient will admit to the servicing facility or begin receiving services.

NOTE: If this is a “retrospective” request, **nH Access** only allows start dates up to 90 days prior to the current date. If the start date is more than 90 days ago, please contact naviHealth using the number provided to you by the patient’s health plan

Continued on next page

Complete the Provider Details Section

8. Verify the **Ordering Acute Facility**. The patient's current facility will automatically display. If you are managing a hospital's caseload, this will match your facility.

NOTE: This facility may be changed if needed following the process in **Step 11**.



Provider Details

Ordering Acute Facility

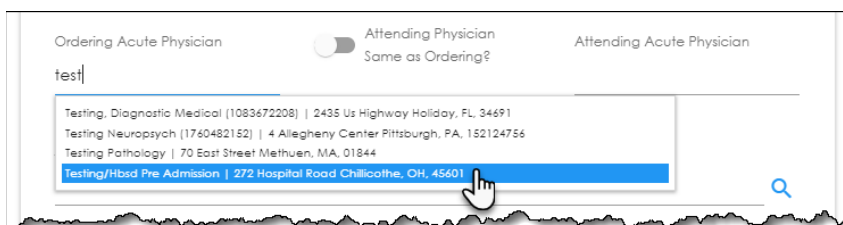
Training Hospital A

1234 LILLY LN, BRANDYWINE

IMPORTANT: If you opened the Authorization Request form from the Potential Patients tab, this field will be replaced with three fields to collect more details about the patient's current care setting. See [Submitting Initial Requests from Potential Patients](#) for more information about completing these required fields.

9. Enter the **Ordering Acute Physician**.
 - a. Begin typing the first or last name of the ordering physician, and a drop-down list of matching physicians will display.
 - b. Select the physician from this list.

IMPORTANT: If the physician is not listed, you will NOT be able to submit the authorization request from **nH Access**. Please contact naviHealth using the number provided to you by the patient's health plan to request the authorization. (The physician will be added to the list for future authorizations.)



Ordering Acute Physician

test|

Testing, Diagnostic Medical (1083672208) | 2435 Us Highway Holiday, FL, 34691

Testing Neuropsych (1750482152) | 4 Allegheny Center Pittsburgh, PA, 152124756

Testing Pathology | 70 East Street Methuen, MA, 01844

Testing/Hbsd Pre Admission | 272 Hospital Road Chillicothe, OH, 45601

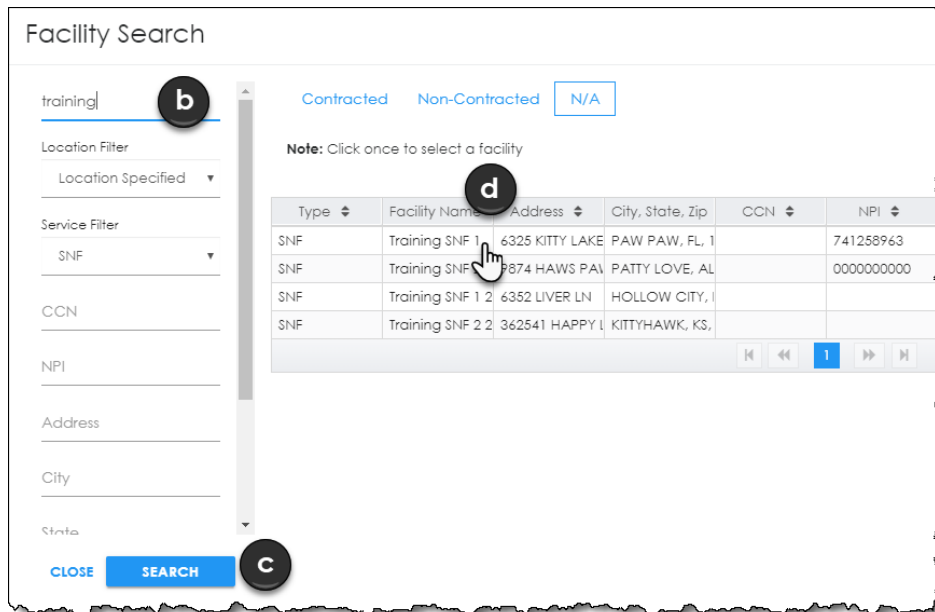
10. Click the **Attending Physician Same as Ordering?** slider to copy the ordering physician into the **Attending Acute Physician**.

NOTE: You may also follow same steps as for the ordering physician if you need to select a different physician.

Continued on next page

11. Enter the **Servicing PAC Facility**. This is the facility to provide care or services to the patient. If you are managing the caseload for a post-acute provider, this will be your facility.

- a. Begin typing the facility name to display Facility Search screen.



- b. Enter all or part of the facility name and any other search criteria on the left.

- c. Press **[Enter]** or click **Search** to display the matching facilities.

NOTE: Results may be further refined by selecting **Contracted** or **Non-Contracted** at the top of the search results list.

- d. Click the desired facility (only one may be selected). The Facility Search screen will close, and the selected facility will display in the form.



NOTE: A warning will display if the facility is out-of-network for the patient's health plan.

12. Enter **Additional Authorization Comments** if needed to clarify the request.

Continued on next page

Optional Step: Rapid Review for Skilled Nursing Facility Authorizations

13. If the authorization request is for a patient in your caseload or potential patient transitioning to a Skilled Nursing Facility, you may see the checkboxes below display beneath the Provider Details section. If any of the conditions listed are checked, it will initiate naviHealth’s Rapid Review process which enables quicker determination. NOTE: This option will ONLY appear if the patient’s Health Plan participates in Rapid Review.

a. Check the boxes that apply to the patient’s condition.

Additional Authorization Comments

insert your comments...

Does the patient have any of the following conditions?

- New PEG tube placement** within current hospitalization
- IV medication** with a frequency of twice per day or greater with more than three days remaining at hospital discharge
- New tracheostomy procedure** during current acute hospitalization
- Based on recent therapy assessment, patient was **independent** or **modified independent** with mobility prior to hospitalization and now requires **significant physical assistance** (>25-50% assist)
- Based on recent therapy assessment, patient was **independent** or **modified independent** with mobility prior to hospitalization, is actively participating in therapy, but due to physical capacity limitation is **unable to walk farther than within a hospital room** (provided appropriate AD usage)

Please attach clinical documentation supporting this selection.

Document Check List

b. Make sure to upload available documentation which supports the request for Rapid Review in [Step 14](#).

Upload the Documentation




- Click **Upload Documents** to select and upload the supporting document(s). Refer to the Document Check List to ensure you include the necessary documentation to complete the authorization.

Document Check List


These are the documents needed to complete this authorization:

- Hospital Face Sheet
- History & Physical Document
- Therapy Evaluations (within 48 hours)
- Most Recent Therapy Notes (Within the Past 24-48 hours)
- Most Recent Physician Note (Within the Past 24 hours)
- Physician Orders Sheet//Medication List
- Post-Procedure Notes
- Nursing Admission Assessment

RESULT: Each selected document will display below the Document Check List.

Document Name	
HISTORY AND PHYSICAL.pdf	
PHYSICIAN ORDERS.pdf	
THERAPY EVALUATIONS.pdf	

NOTE:

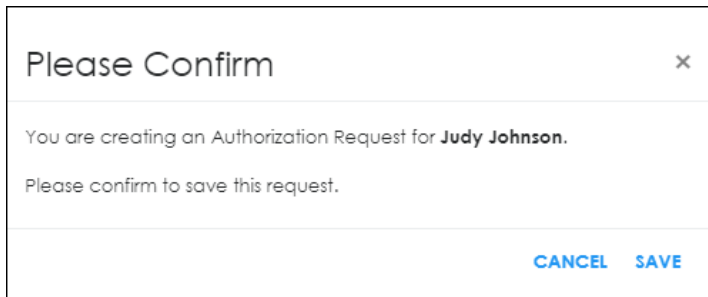
- This step may be repeated as needed to select additional documents. If you completed [Step 13](#), please include any supporting documentation for Rapid Review.
- If a document was uploaded in error, click the Trash Can icon  to the right of the document to remove it.
- If needed documentation is unavailable, you may continue to submit the authorization request and upload the remaining documentation at a later time. See [Uploading Documents](#).

Continued on next page

Save and Submit the Request

15. Click **Save**.

RESULT: You will be prompted to confirm the request.



16. Click **Save** to confirm the authorization request submission.

RESULT:

- A green confirmation notification will display. The authorization and documentation have been saved and sent to naviHealth for review.
- The Authorization Request form will close automatically. The request you just submitted will now display in the Authorizations section of the Patient Screen with a "Pending" status.

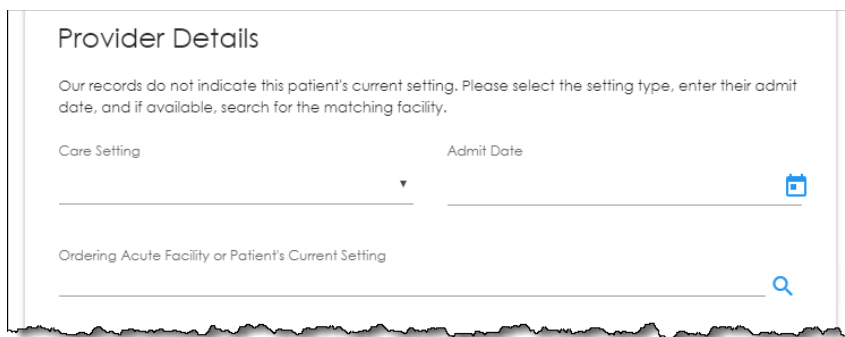
Authorizations								
Plan Auth ID	naviHealth Auth ID	Service	Request Date	Dates	Status	Request / Approve / Denied	Rug/Level/CMG	Next Review Date
412009		SNF	03/31/2019	04/01/2019	Pending	0/0/0		

SUBMITTING INITIAL REQUESTS FROM POTENTIAL PATIENTS

If the **Request Initial Auth** button displays on the patient card in the Patient Lookup Results on the Potential Patients tab, click this button to display the Authorization Request form.

This form is divided into the same three (3) sections as the Authorization Request form available on the Patient Screen as discussed in the previous section, [Submitting Initial Requests from the Patient Screen](#), and you may follow the same process outlined in that section to complete the form except for the important differences in the Provider Details section as noted below.


IMPORTANT: The Provider Details section in this version of the form will display the additional fields below to collect information about the patient’s current care setting, which will allow naviHealth to set up the patient’s record and begin processing your request.




Provider Details

Our records do not indicate this patient's current setting. Please select the setting type, enter their admit date, and if available, search for the matching facility.

Care Setting Admit Date

_____ _____ 

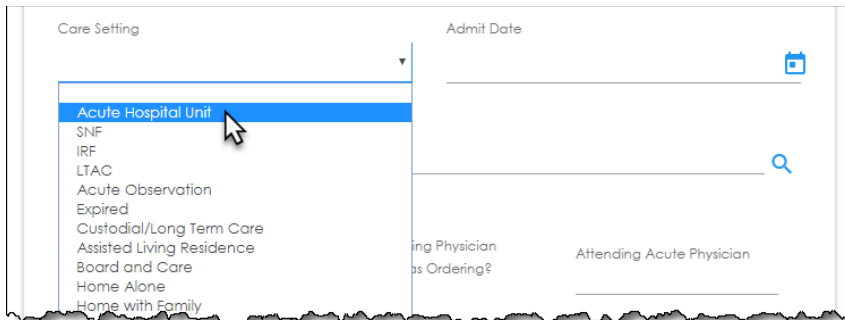
Ordering Acute Facility or Patient's Current Setting

_____ 

Continued on next page

Follow the steps below to complete the additional Provider Details fields in the Authorization Request form.

1. Select the patient’s current level of care in the **Care Setting** dropdown.



2. Enter the **Admit Date** as the date the patient admitted to this care setting or began receiving services.
3. If the selected care setting is anything other than a “home” setting such as “Home Alone” or “Home with Family”, the **Ordering Acute Facility or Patient’s Current Setting** field is required. Enter the facility currently providing care or services to the patient following the process in [Step 11](#) of the previous section.

NOTE: If the selected care setting is a “home” setting, this field may be left blank.

Once the authorization request has been saved and submitted, the Authorization Request form will close automatically, and the Potential Patients tab will display with the patient card still available in the search results. You may now click this card to open the Patient Screen and view the pending request and attached documentation.

IMPORTANT NOTES:

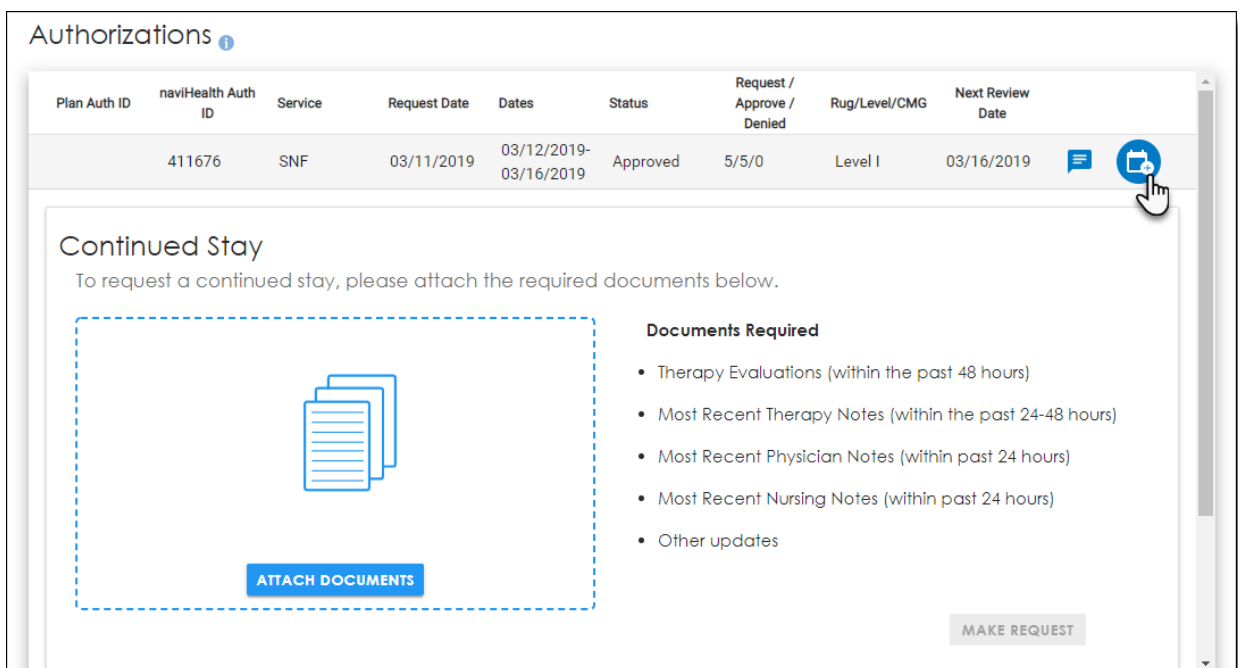
- Once an authorization request has been submitted to naviHealth, the authorization details cannot be edited in **nH Access**.
- If you need to request an update to the authorization, such as a different start date or facility, or alert naviHealth that additional documentation will be coming later, see [Communicating with naviHealth](#).
- Additional documentation may be uploaded at any time. See [Uploading Documents](#).

Continued Stay Requests

When a patient has a *previously approved authorization* for a post-acute stay at your facility and requires additional days of service, follow the steps below to initiate a continued stay request and upload the supporting documentation. (See [Authorization Type Definitions](#) for clarification of authorization request types.)

1. Click the Continued Stay icon  to expand the **Continued Stay** section.

NOTE: This icon will display next to the most recently approved authorization line.




The screenshot shows the 'Authorizations' section of the naviHealth interface. A table lists authorization details, and the 'Continued Stay' section is expanded for the most recent entry.

Plan Auth ID	naviHealth Auth ID	Service	Request Date	Dates	Status	Request / Approve / Denied	Rug/Level/CMG	Next Review Date
	411676	SNF	03/11/2019	03/12/2019-03/16/2019	Approved	5/5/0	Level I	03/16/2019

Continued Stay

To request a continued stay, please attach the required documents below.



ATTACH DOCUMENTS

Documents Required

- Therapy Evaluations (within the past 48 hours)
- Most Recent Therapy Notes (within the past 24-48 hours)
- Most Recent Physician Notes (within past 24 hours)
- Most Recent Nursing Notes (within past 24 hours)
- Other updates


MAKE REQUEST


Continued on next page


2. Click **Attach Documents** to select and upload the supporting document(s). Refer to the Documents Required list to ensure you include the necessary documentation to complete the authorization. This step may be repeated as needed.

Continued Stay
To request a continued stay, please attach the required documents below.

3 Documents Uploaded

CONTINUED STAY DOCUMENTS.pdf 

THERAPY EVALUATIONS.pdf 

THERAPY NOTES.pdf 

4 Add Comments


patient requires additional days

Documents Required

- Therapy Evaluations (within the past 48 hours)
- Most Recent Therapy Notes (within the past 24-48 hours)
- Most Recent Physician Notes (within past 24 hours)
- Most Recent Nursing Notes (within past 24 hours)
- Other updates

2 ATTACH DOCUMENTS

5 MAKE REQUEST

3. The selected document(s) will display in the Documents Uploaded list. If a document was uploaded in error, click the Trash Can icon  to the right of the document to remove it.
4. (Optional) Enter comments regarding the documents in the **Add Comments** field if necessary. The comments entered will apply to all documents selected for upload.
5. Click **Make Request**.

RESULT: A green confirmation notification will display. The documentation has been saved and sent to naviHealth for review.



IMPORTANT:




- A new authorization line will NOT display until naviHealth has reviewed the documentation and processed the request.
- Additional documentation may be uploaded at any time without submitting a new request. See [Uploading Documents](#).

Communicating with naviHealth



Once an initial authorization request has been saved and submitted, the authorization details may NOT be edited within **nH Access**. To request a change to a pending request, you must send a message to the naviHealth clinicians working the case.

On the Patient Screen, a Message icon will display on the right of each authorization line, and the color of the icon will indicate if new messages are present.

-  indicates all messages (if any) have been viewed.
-  indicates a new message is available.

Plan Auth ID	naviHealth Auth ID	Service	Request Date	Dates	Status	Request / Approve / Denied	Rug/Level/CMG	Next Review Date	
411676		SNF	03/11/2019	03/12/2019-03/16/2019	Approved	5/5/0	Level I	03/16/2019	 
411676		SNF	03/06/2019	03/07/2019-03/11/2019	Approved	5/5/0	Level I	03/11/2019	

Click the Message icon to expand and collapse the messages section for each authorization line. Historic messages (if any) will display on the right side of the section.

Plan Auth ID	naviHealth Auth ID	Service	Request Date	Dates	Status	Request / Approve / Denied	Rug/Level/CMG	Next Review Date	
412009		SNF	03/31/2019	04/01/2019	Pending	0/0/0			 


To request a change or an update to an authorization, please use the tool below.

Briefly tell us about your issue (max 250 characters).

NOTE: Requests to change a patient’s authorization may also be submitted by calling or faxing naviHealth using the numbers provided by the patient’s health plan, but such requests will NOT display in the message history.

Sending Messages

New messages may be sent from any authorization line, but best practice is to use the most recent line at the top of the list. Follow the steps below to send a new message.

1. Click the Message icon  in the most recent authorization line.

Plan Auth ID	naviHealth Auth ID	Service	Request Date	Dates	Status	Request / Approve / Denied	Rug/Level/CMG	Next Review Date
D000061746	422230	SNF	03/02/2019	03/02/2019	Pending	0/0/0		

To request a change or an update to an authorization, please use the tool below.

2

3

SEND

2. Enter your message to naviHealth in the text field on the left.
3. Click **Send**.

RESULT: The new message will be added to the message history on the right.

To request a change or an update to an authorization, please use the tool below.

Briefly tell us about your issue (max 250 characters).

SEND

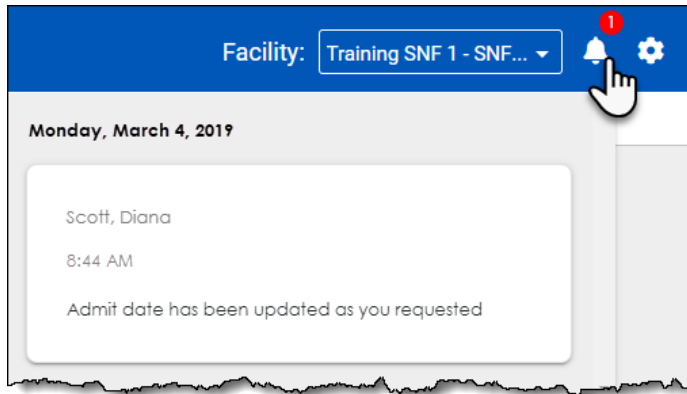
Waiting for a response


Sent 03/04/2019 07:11:41 CST

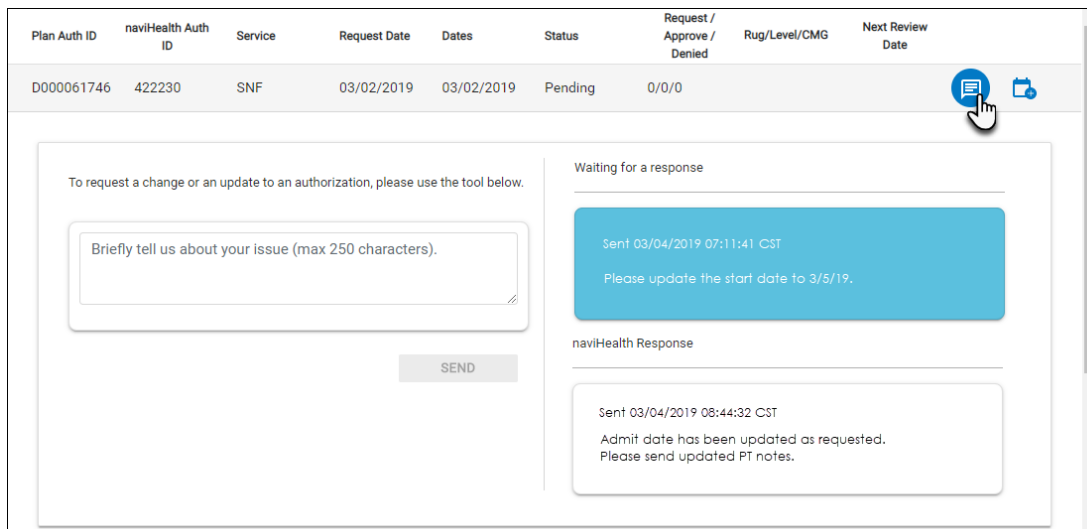
Please update the start date to 3/5/19.

Receiving Messages

When a new message is received from naviHealth, a red indicator will display on the notification icon in the upper right of the screen. Click the indicator to display a list of message notifications. The name at the top of each notification identifies the patient to whom the message applies.

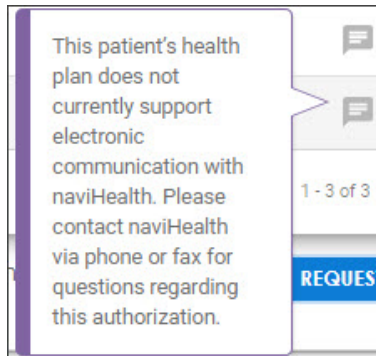


To view the entire message and clear the notification, navigate to the corresponding patient using the Caseload Screen. Click the Unread Message icon  in the patient's authorization section to display the message. Once the message has been displayed, the corresponding notification will clear automatically.



Important Notes:

- Unread messages older than two (2) weeks will be automatically marked as read, and the corresponding notifications will be removed from the notification list.
- If the patient's Health Plan is NOT participating in the Messaging feature, you will see the following notification when hover over the Message icon.







Managing Patient Documents

Document Requests

The **Document Requests** section of the Patient Screen displays each document type requested by naviHealth for the patient and when each document is needed along with any relevant comments.

The **Status** column provides a visual indicator of each request status.

-  The document is currently due.
-  The document is past due.

Document Requests			
Document Type	Due Date	Status	Comments
Additional Clinical	5/25/2018		Need ADLs
Power of Attorney	5/30/2018		

Go to page: Show rows: 1-2 of 2

Upload Documents

Use the **Upload Documents** section of the Patient Screen at any time to attach clinical documentation to the patient's record. Documents may also be uploaded in response to specific requests by naviHealth. See [Uploading Documents](#) for detailed instructions.







NOTE: Documents must be saved to your computer or network in order to be uploaded into **nH Access**. Use the "Print to PDF" functionality of your EMR or other applications to extract patient documentation prior to uploading.


Documents

The **Documents** section of the Patient Screen lists all documents attached to the patient's record. Each document is identified by name, type, and upload date.

The **Source** column indicates where each document was attached.

- **Portal** – documents uploaded using **nH Access**. The type may be edited for these documents, and documents uploaded in error may be deleted by clicking the Trash Can icon .
- **Coordinate** – shared documents uploaded by naviHealth clinicians using **nH Coordinate** (naviHealth's internal patient care management tool). These documents may be viewed, but they may NOT be updated or deleted.

Documents					
	Document	Document Type	Upload Date	Source	Actions
▶	Approval Letter.pdf	Other	03/22/2019, 15:20:02	Coordinate	
▶	Therapy Evls.pdf	Continued Stay Request	03/28/2019, 12:25:52	Portal	
▶	Additional Clinicals.pdf	Additional Clinical	03/29/2019, 13:37:01	Portal	

Go to page: Show rows: 1-3 of 3 

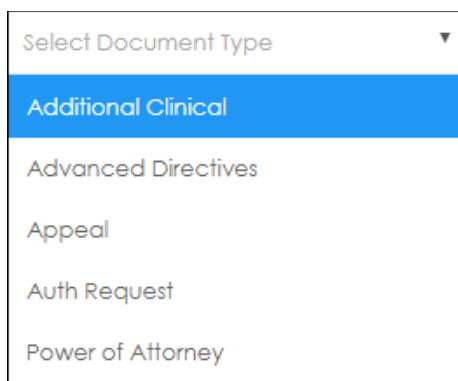
Each listed document may be reviewed and downloaded by clicking the document name. Click the arrow to the left of each document to review any comments entered at the time of upload.

Document Types

Documents uploaded in **nH Access** must be identified by the most appropriate Document Type describing the contents of the document. This enables the naviHealth clinician working the case to easily identify how to process each document received. The available document types are descriptively labeled and will be appropriate for your facility type.

IMPORTANT: Always choose the document type which best describes the document you are uploading.

ACUTE DOCUMENT TYPES

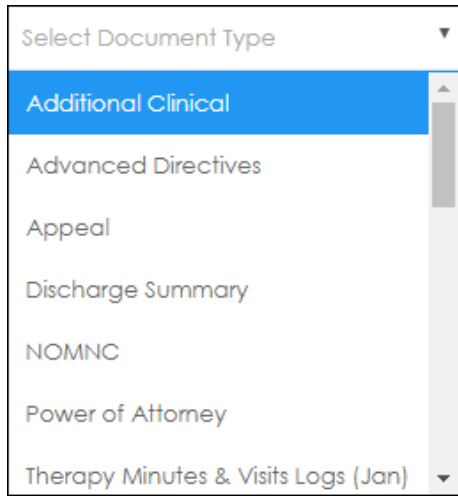


A screenshot of a dropdown menu titled "Select Document Type". The menu is open, showing several options. The option "Additional Clinical" is highlighted with a blue background. The other options are "Advanced Directives", "Appeal", "Auth Request", and "Power of Attorney".

NOTE:

- **Auth Request** is automatically assigned to all documents uploaded in the Authorization Request form.
- Select **Additional Clinical** when uploading documentation supporting a previously submitted initial authorization request.

POST-ACUTE DOCUMENT TYPES (EXAMPLE: SNF)

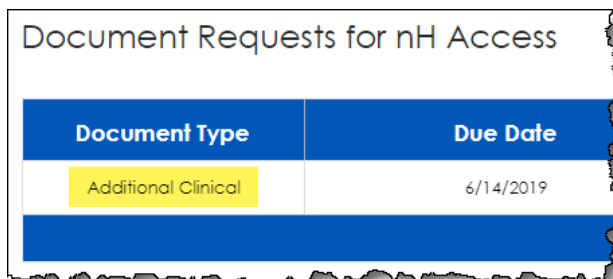


NOTE:

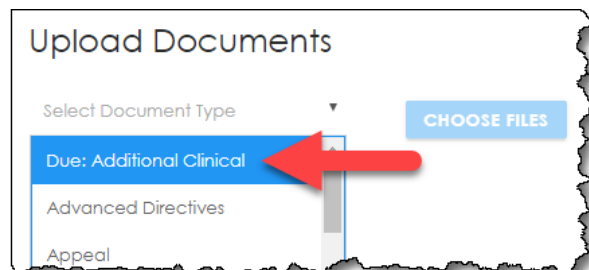
- Select **Additional Clinical** when uploading documentation supporting a previously submitted initial authorization request.
- When uploading therapy logs, select the **Therapy Minutes & Visits Logs** option corresponding to the month in which the therapy took place.
- **Continued Stay Request** is automatically assigned to all documents uploaded using the Continued Stay feature in the Authorizations section, but this type may NOT be selected here. See [Submitting a Continued Stay Request](#) to upload documents initiating requests for additional days.

REQUESTED DOCUMENTS

If you are uploading a document requested by naviHealth, the request will display in the Document Requests section. Choose the corresponding document type preceded by "Due" to associate your document with that specific request. Once the document is uploaded, the corresponding request will drop off of the Document Requests list.



Document Type	Due Date
Additional Clinical	6/14/2019



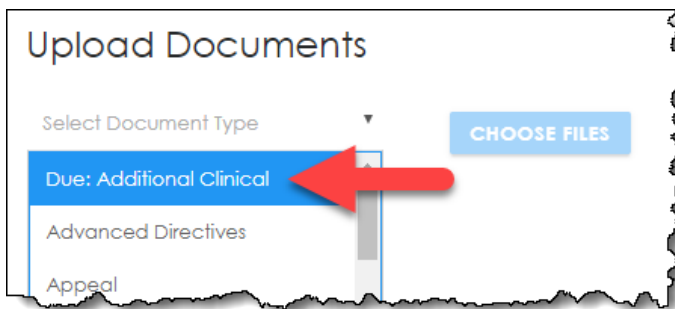
Uploading Documents

Follow the steps below to upload new documents to the patient record.




1. Click the **Select Document Type** drop-down to choose the appropriate type for the document(s) being uploaded.

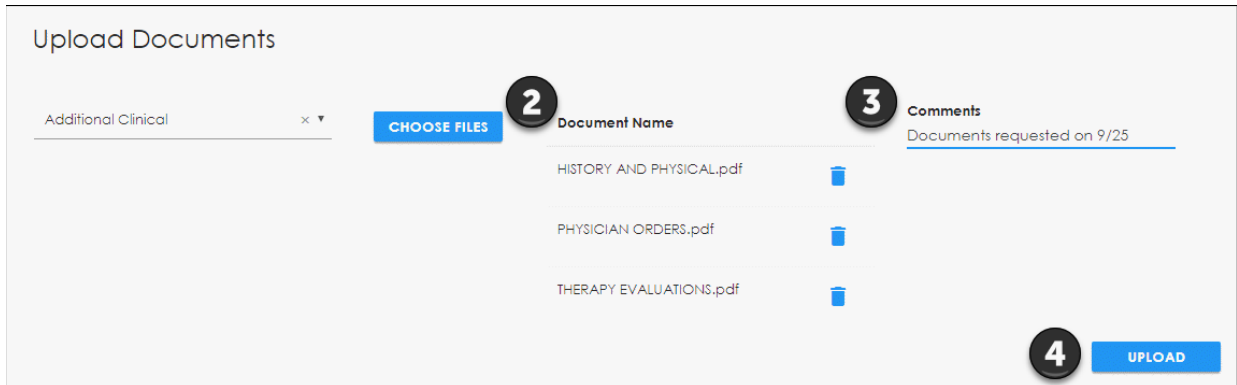
IMPORTANT: If you are uploading a requested document, select the corresponding document type preceded by "Due".



Continued on next page




2. Click **Choose Files** to select the document(s). Multiple documents may be selected, and this step may be repeated as needed. All selected documents will display to the right of the Choose Files button.

NOTE: If a document is selected in error, click the Trash Can icon  to remove it.



Upload Documents

Additional Clinical x ▾ **2** CHOOSE FILES

Document Name	3 Comments
HISTORY AND PHYSICAL.pdf 	Documents requested on 9/25
PHYSICIAN ORDERS.pdf 	
THERAPY EVALUATIONS.pdf 	

4 UPLOAD

3. (Optional) Add **Comments** regarding the document(s) if necessary. The comments entered will apply to all documents selected for upload.
4. Click **Upload** to upload the document(s).

RESULT:

- The new document(s) will display in the Documents list.
- If the document(s) were uploaded in response to a request, the corresponding request will drop off of the Document Requests list.