

Using ProviderLink to Create Templates – HME Providers

In ProviderLink, an HME facility administrator has the ability to set up different types of templates for various forms and messages such as: 1) DMERC CMNs, 2) message cover letters, and 3) state specific Medicaid forms (e.g., NC Medicaid CMN).

For DMERC or CMN forms, templates can be set up to help enter frequently-typed statements or entries into certain fields on the forms. Templates can also be created for any type of message users at a facility may send to either a recipient online with ProviderLink or a fax-only contact. Using templates can help standardize messages within a facility to foster consistency among staff members. Following are the instructions for creating each type of template.

■ Create a DMERC CMN Template

This type of template is used in “Section C” of a CMN, which is the section where you are required by Medicare to enter the narrative description of the items or accessories, the supplier's charge, and the Medicare Fee Schedule. You (i.e. facility administrator) will need to set up this type of template for each DMERC CMN used at your facility. Once a template has been created for a CMN, a “Template” button will appear on “Section C” of the CMN.

For example, you can set up a template that includes all the billing information for a particular type of CMN. (e.g., oxygen concentrators, portable gas systems, conserving devices, liquid oxygen, etc.).

Following is an example of template content for an oxygen concentrator:

| | | |
|---------------------|----------|----------|
| Oxygen Concentrator | \$350.00 | \$225.00 |
| Portable Gas System | \$100.00 | \$ 30.50 |

To create a DMERC CMN template:

1. Login to ProviderLink.
2. Choose the appropriate Work List View, and click *Submit* to go to the Main Window screen.
3. On the Main Window screen, click the *patient's name* to display the View Patient Information screen.
4. On the View Patient Information screen, click *Documents* on the menu bar to display the Documents screen.
5. On the Documents Management screen, click *E-Forms* on the menu bar, and select the *DMERC CMN* from the drop-down list for which you want to create the template. The form displays on the screen.
6. On the form viewer screen, click *Templates* on the menu bar. The Form Templates screen displays.
7. On the Form Templates screen, click *New* on the menu bar. The Add/Edit Template Information screen displays.
8. On the Add/Edit Template Information screen, complete the following fields:
 - a. Template Name: This is the name that will appear in the drop-down list when the Template button is used.
 - b. Template Description: This is for internal use only and only displays when editing the template.
 - c. Text to Appear: This is the actual text that will be entered on the form. (See the example above.)
 - d. Click *Save* to complete the process. The Form Templates screen displays with the name and description of the new template, which is now available for use.

■ Create a Cover Letter Template

This type of template is used for adding standardized text to the body of a message, for example, when sending a CMN to a physician, or a prior authorization to Medicaid. The template should include anything normally typed/written on a fax cover sheet. Your name, phone number, and fax-back instructions are automatically printed on the cover sheet so you do not need to rewrite that information.

Some examples of cover letter templates include a second request, or any other information that the receiving person may need when your communication arrives at their office, or discharge information for oxygen patients.

For example you could create the cover letter template to look like the example below and all you would have to complete when sending the CMN is the specific information in this form.

The following information was supplied to us at discharge for this patient:

tip sheet

Estimated Length of need: _____ Months: _____ Diagnosis Code: _____
Discharge saturation: _____ ABG: _____
Date test taken: _____
Test was taken in a () chronic stable state or () two days within discharge
Test taken () at rest () during exercise () during sleep
Place test was performed: _____
() patient is mobile within the home for portable oxygen
LPM: _____

To create the Cover Letter template:

1. Log in to ProviderLink, and go to the Main Window screen.
2. Click *Setup* on the menu bar to display the View Main Facility Information screen.
3. From the View Main Facility Information screen menu bar, click *Templates*. The Templates screen displays.
4. From the menu bar, click *New*. The Add/Edit Template Information screen displays.
5. On the Add/Edit Template Information screen, complete the following fields:
 - a. Template Name: This name will appear in the Templates drop-down menu when users create messages.
 - b. Template Description: This is for internal use only and only displays when editing the template.
 - c. Text to Appear: This is the actual text that will be entered on the form. (See the example above.) You may use the underline character () to create “blanks” for the user to fill in, if desired.
 - d. Click *Save* to complete the process. The Form Templates screen displays with the name and description of the new template, which is now available for use.

The following section applies only to North Carolina HME providers, and provides instructions for creating a template that can be used with a NC Medicaid CMN or prior authorization (PA).

■ Create a NC Medicaid CMN/PA Template

This type of template is used in “Section 25” of the NC Medicaid CMN/PA where you are required to enter a medical justification for the equipment/supplies you are providing. You will only need to set up this type of template once. “Section 25” is limited to the amount of space you have for writing the justification. NC Medicaid states that you should be tailoring the justification to that particular patient, and does not want long, generic justifications that cover everything. The space is limited to five (5) lines or 610 characters in that space. Once you have created a template, it is displayed in the drop-down list when the user clicks the Template button in “Section 25” of the form.

If you have a lot of equipment and supplies to be listed on the CMN/PA and the justifications will be longer than the space allowed, simply complete more than one CMN/PA. Remember, after you create the first CMN/PA, you can easily “save a copy” and make your changes by entering the additional equipment or supplies on the new copy. Many clients put the rental equipment on one PA and the supplies on the other. Also, remember that you can abbreviate some words like “w/c” for wheelchair or “pt” for patient. This saves space and is still readable.

For example, you can set up a template for the justification for wheelchairs, beds, oxygen discharge information, etc.

Following is an example for the template content for the justification of a lightweight wheelchair:

Patient's condition is such that without the use of a wheelchair the patient would be bed or chair confined. The patient cannot propel himself in a standard w/c using arms and/or legs and the pt can propel himself safely and functionally in a light weight wheelchair.

To create the NC Medicaid CMN/PA template:

1. Log in to ProviderLink, and go to the Main Window screen.
2. On the Main Window screen, click the *patient's name* to display the View Patient Information screen.
3. On the View Patient Information screen, click *Documents* on the menu bar to display the Documents screen.
4. On the Documents Management screen, click *E-Forms* on the menu bar, and select the NC-CMNPA from the drop-down list for which you want to create the template. The form displays on the screen.
5. On the form screen, click *Templates* on the menu bar. The Form Templates screen displays.
6. On the Form Templates screen, click *New* on the menu bar. The Add/Edit Template Information screen displays.

tip sheet

7. On the Add/Edit Template Information screen, complete the following fields:
 - a. Template Name: This is the name that will appear in the drop-down list when the Template button is used.
 - b. Template Description: This is for internal use only and only displays when editing the template.
 - c. Text to Appear: This is the actual text that will be entered on the form. (See the example above).
 - d. Click Save to complete the process. The Form Templates screen displays with the name and description of the new template, which is now available for use.