Administrative Simplification
Web Validation Worksheet
BPR - Requesting & Receiving Claim Status Information

Provider Organization: _____

Contact Person: _____

Contact Phone: _____

Date of Validation: _____

Health Plan being Validated: _____

General Instructions

Prior to completing this worksheet, ***please familiarize yourself with the BPR - Requesting & Receiving Claims Status***. Then, use this worksheet to assess how well the health plan's web site meets the requirements that are defined in the BPR document.

Please check claim status information for as many claims as you want, but at least 3. Feel free to try looking up claims that you know are split, adjusted or duplicates to make sure that status is reported appropriately.

Use this worksheet to record what you found for the 3 claims; C1, C2 and C3.

	Health Plan Claim Number
C1	
C2	
C3	

This worksheet will first ask you to assess the web site content and then ask you to assess the web site usability. As you look for the information, keep in mind how easy/hard it was to find it.

In the tables below, complete the columns that are highlighted in green.

- If you do not answer, a positive response will be assumed, e.g. 'Yes the requirement was met'.

- Page 2 of the Best Practice Requirements (BPR) document calls for information on the web site to match information available from customer service (if the health plan makes the information available through a Customer Service type department.) As your time permits, please check with customer service to verify the information on the web site. If you don't check with customer service, please leave the column blank. Otherwise, answer 'Yes' if the web site information is the same as the customer service information, or 'No' if they are different.

Note: When calling some health plans, they may refer you to their web site in lieu of providing claim status information over the phone. If this is the case, answer 'Yes' to any questions asking if the content of the web site was the same as customer service.

- If you answer 'No' to any questions, feel free to attach screen shots if they can helpful in illustrating what you found.

Have you reviewed the BPR – Requesting and Receiving Claims Status Information?

Yes/No: _Yes_____ If 'No' - please do so before continuing.

I. Web Site Information Content

A. Claim Look-up

Options for Claim Lookup	Requirements	BPR Page#
Try to search using at least 2 different methods (or combinations of data elements). In either method, no more than the following data elements should be required to find the claim. o Patient Control Number o Health Plan's Identifying Claim Number o Subscriber/Member ID o First Name o Last Name o Patient Date of Birth o Date of Service (or range of dates)	• Multiple Search Methods/combinations (at least 2) • Minimum Set of Data required for a Search Method (no more than 5)	10
Time Period for Search Results	<20 seconds	11

1. Look Up Options

Could you look up a claim using at least 2 different methods/combinations of the above data elements? Yes/No: _____

If NO, what 2 combinations of data elements did you try (list the 5 elements)?

a. Combination 1: _____, _____, _____, _____, _____

b. Combination 2_____, _____, _____, _____, _____

2. *Time Period*

   Was a search result(s) returned in less than 20 seconds? Yes/No: _____

3. *Search Results*

   For any of the claim look-ups, was more than one claim found? Yes/No: _____

   If YES, which, if any, of the following data elements were contained in the search results, i.e. the list of matching claims from which you can select?

Search Results Information	On Summary List (Y -N)	On Detail Results (Y -N)	BPR Page#
Patient Name			10
Patient Control Number *(this is the number used by the provider to identify the claim, e.g. patient account number)*			11
If 'No', was Patient Control Number entered on the submitted claims			
Health Plan Claim Number			11
Date of Service (range of dates)			11
$ Amount of Billed Charges			11
A link to more detailed information about the claim		▨	11

4. *Overall Functioning*

   Did the claim lookup work as you expected?

Question?	C1 (Yes-No)	C2 (Yes-No)	C3 (Yes-No)
Did the claim lookup work as you expected? (Y-N) **If NO - provide detail in the table below!**			
Did you include Patient Control Number as one of the search criteria? (Y-N)			
If YES and a claim was found, does the Patient Control Number on the claim match the Patient Control Number that you entered? (Y-N)			

Had the claim that you were looking up been adjusted, e.g. was it a corrected claim? (Y-N)			
If YES, how many versions of that claim were returned? (**1, 2, 3 ...**)			

Problem/Concern/Issue with Claim Lookup

	General Comments or Supporting Information
Content	
Usability	

B. Information Presented about a single Claim

Question?	Claim	Answer (Y - N)	Comments / Explanation	BPR Page #
For the specific claim that was selected, was only the most recent status provided? **If NO, please explain**	C1			
	C2			9
	C3			
Was the status information that was provided appropriate for the claim and/or the line? **If NO, please explain.**	C1			
	C2			9
	C3			
Was the status information complete? **If NO:** **a) please include the status information that was provided?** **b) What other information did you expect to see?**	C1		a) b)	
	C2		a) b)	9
	C3		a) b)	

When accessing the status information outlined above, were the following requirements met?

Requirement	Requirement Met for C1/C2/PC3? Y or N	BPR Page #
Was each page of information displayed within 20 seconds of click		11
Was the information on the Web Site and from Customer Service the same for C1/C2/C3? *Note: Assumed to be consistent unless indicated otherwise*		3

	General Comments or Supporting Information
Content	
Usability	

C. Is the web site accessible using the OHP single sign on?

Capability	Page # in BPR Document	Y or N	BPR Page #
Web site accessible using the OHP single sign on	5-6		10

II. Web Site Usability

How quick and easy was it to find the information that you needed about a claim's status? _____ **(1-5)**

1 - Extremely Difficult: Possible reasons for this rating: Information was not grouped together logically. I had to jump from page to page or scroll endlessly. Format didn't make sense. I couldn't print out the information that I needed.

2 - Difficult:

3 - Okay: Possible reasons for this rating: I could find my way around okay. But it was not as easy or quick as other sites. Printer support didn't exist or was cumbersome.

4 - Nicely Designed:

5 - Excellent: Possible reasons for this rating: Very intuitive and easy to navigate. Quickly found what I needed. Very readable format. Could print what I wanted.

	General Comments or Suggestions
Usability	

Please:

1. **Email a copy of this worksheet to wec3@viaconsulting.com, and**

2. **Email a copy of this worksheet to _____**