# Table of Contents

1. **Introduction** ........................................... 3  
   1.1 About This Manual .................................. 3  
   1.2 PacificSource Mission Statement ................. 3  
2. **Who to Contact** ....................................... 4  
3. **Glossary** ............................................... 10  
4. **Credentialing** ......................................... 22  
   4.1 Credentialing ........................................ 22  
   4.2 Locum Tenens ........................................ 28  
   4.3 Taxpayer Identification Numbers .................. 28  
   4.4 Physician and Provider Contract Provisions ....... 29  
   4.5 Call Share Policy ................................... 38  
   4.6 Accessibility .......................................... 39  
   4.7 Providers ............................................. 41  
   4.8 Appeals Process ...................................... 50  
5. **Referrals** ............................................... 58  
   5.1 Referral Policy ....................................... 58  
   5.2 Referral Procedure .................................. 59  
   5.3 Referral Management Entities ....................... 60  
   5.4 Out-of-Network Referrals ............................. 61  
   5.5 Referral Not Required ................................ 61  
   5.6 Referrals That Are Not Approved .................... 62  
   5.7 Retroactive Referrals ................................ 62  
6. **Medical Management** ................................ 63  
   6.1 Medical Necessity and Coverage .................... 63  
   6.2 Care/Case Management ................................ 64  
   6.3 Quality Improvement and Medical Management .... 68  
   6.4 Preapproval/Preauthorization ........................ 71  
   6.5 Medicaid Retroactive Approval Guidelines ...... 77  
   6.6 Medicare Retroactive Authorization Guidelines ... 78  
   6.7 Utilization Management ............................... 80  
   6.8 Clinical Practice Guidelines ........................ 82  
   6.9 Commercial: Nonreimbursed Nursing Level Charges During an Acute Care Hospital Stay ............... 82  
   6.10 Medicaid: Mental Health Services ................. 83  
   6.11 Medicaid: Substance Use Disorder (SUD) ......... 85  
7. **Pharmacy** ............................................... 86  
   7.1 Drug Lists/Formulary Coverage ...................... 86  
8. **Products** ............................................... 90  
   8.1 Product Descriptions ................................ 90  
   8.2 Plan Features ......................................... 91  
9. **Members** ................................................. 100  
   9.1 Enrollment ............................................ 100  
9.2 Member ID Card ........................................ 101  
9.3 Rights and Responsibilities ............................ 102  
9.4 Member Grievance and Appeals Process ............. 109  
10. **Claims** ................................................. 111  
    10.1 Eligibility and Benefits ............................. 111  
    10.2 HCPCS Coding ...................................... 112  
    10.3 Claims and Payment Rules .......................... 113  
    10.4 Claims Submission Requirements .................. 116  
    10.5 Corrected Claims Submission ....................... 120  
    10.6 Medicare: Special Benefits ........................ 120  
    10.7 Explanation of Payment (EOP) ...................... 121  
    10.8 Prompt Pay Policy .................................. 122  
    10.9 Accident Report Policy ............................. 122  
    10.10 Coordination of Benefits ......................... 123  
11. **Billing Requirements** ............................... 126  
    11.1 Incident to Billing ................................... 126  
    11.2 Osteopathic Manipulation Treatment .............. 127  
    11.3 Global Period ....................................... 128  
    11.4 Commercial: Obstetric and Gynecology Care Billing Guidelines .......................... 129  
    11.5 Emergency Services .................................. 133  
    11.6 Surgery .............................................. 135  
    11.7 Colonoscopy .......................................... 141  
    11.8 Evaluation and Management (E&M) Billing Guidelines .................................. 141  
    11.9 Medicare: Annual Wellness Visit (AWV) .......... 144  
    11.10 Ultrasound: Same-day Billing of Transvaginal and Standard .................. 146  
    11.11 Never Events Policy ................................. 147  
    11.12 Routine Venipuncture and/or Collection of Specimens ................................ 149  
    11.13 Inpatient Hospital Services ......................... 149  
    11.14 Lab Handling Codes .................................. 150  
    11.15 Clinical Lab Services ............................... 150  
    11.16 Editing Software for Facility and Professional Claims ................................ 150  
    11.17 Vision—Routine vs. Medical ....................... 151  
    11.18 Telehealth or Telemedicine ......................... 151  
12. **Publications and Tools** ............................. 154  
    12.1 Websites and Online Resources ..................... 154  
    12.2 Email Newsletters and Bulletins .................... 156  
    12.3 Medicaid: LineFinder .................................. 156  
    12.4 Material in Alternate Format ....................... 156  
    12.5 Healthcare Interpreter (HCI) Services ............ 156  
13. **Health Plan Responsibility** ....................... 158  
14. **Compliance & Program Integrity** ................ 162
1. Introduction

1.1 About This Manual

PacificSource has prepared this Provider Manual for our contracted providers. It is a reference tool to provide important information concerning the role of the provider and office staff in the delivery of healthcare to our members and your patients. This manual provides critical information regarding provider and plan responsibilities. This document should be used in conjunction with your contract with PacificSource. For the purpose of brevity, we use the term “provider” throughout the manual to refer to physicians and/or providers.

Take a moment to look over the sections that relate to your responsibilities. You will find the expanded glossary helpful in becoming familiar with common insurance terminology and, of course, your comments, questions and/or suggestions are always welcome.

This manual does not address processes and procedures specific to the Legacy Health-PacificSource Integrated Delivery System (IDS) within the Health Share of Oregon coordinated care organization (CCO). PacificSource will publish updates specific to the IDS as they become available. In the interim, if you have any questions about processes and procedures specific to serving members enrolled in the IDS within Health Share of Oregon, please contact your Provider Service Representative or PacificSource Customer Service for additional information.

Legacy Integrated Delivery Systems (IDS)

In addition to using this Provider Manual, we suggest you visit our websites, PacificSource.com, CommunitySolutions.PacificSource.com, and Medicare.PacificSource.com. There you will find other useful tools, such as provider directories, formularies, and plan documents.

We hope you will find the information in the Provider Manual and on the websites to be useful. PacificSource Provider Service Representatives are committed to providing tools that meet the needs of our in-network physicians and providers. Please let us know if you have questions about any aspect of this manual or have suggestions regarding how we can improve this document in the future.

Thank you for becoming a team member in the partnership between PacificSource, members, and our in-network physicians and providers.

Notice of Changes

For any change in a PacificSource policy or process to this Provider Manual, we will provide written notice. Notice will be provided by email or by fax, and will be posted at these web pages: PacificSource.com/Providers, Medicare.PacificSource.com/Providers, CommunitySolutions.PacificSource.com/Providers

This manual gives you the details about important information concerning the role of the provider and office staff in the delivery of healthcare to our members and your patients. It provides critical information regarding provider and plan responsibilities. This document should be used in conjunction with your PacificSource contract.

1.2 PacificSource Mission Statement

The Mission of PacificSource
To provide better health, better care, and better cost to the people and communities we serve

Provider Network Department Mission
To create and maintain partnerships among internal and external customers resulting in adequate access to quality service in a competitive market.
2. Who to Contact

Commercial Customer Service

**Oregon and Washington:** (541) 684-5582, (888) 977-9299  
**Idaho:** (208) 333-1596, (800) 688-5008  
**Montana:** (406) 442-6589, (877) 590-1596  
**Fax:** (541) 684-5264  
**Email:** cs@ pacific source.com  

Call Customer Service Monday to Friday, from 7:00 a.m. to 5:00 p.m. PT

Medicaid Customer Service

**Toll-free, all areas:** (800) 431-4135  
**Central Oregon and Gorge:** (541) 382-5920  
**Marion, Polk, and Lane Counties:** (503) 210-2515  
**TTY:** (800) 735-2900  
**Fax:** (541) 322-6423  
**Email:** CommunitySolutionsCS@ pacific source.com  

Call Medicaid Customer Service Monday to Friday, from 8:00 a.m. to 5:00 p.m. PT

Medicare Customer Service

**Bend, OR:** (541) 385-5315  
**Springfield, OR:** (541) 225-3771  
**Boise, ID:** (208) 433-4612  
**Toll-free:** (888) 863-3637  
**TTY:** (800) 735-2900  
**Fax:** (541) 322-6423  
**Email:** MedicareCS@ pacific source.com  

Call Medicare Customer Service:  

- **October 1–March 31**  
  8:00 a.m. to 8:00 p.m. local time zone, seven days a week  
- **April 1–September 30**  
  8:00 a.m. to 8:00 p.m. local time zone, Monday–Friday

Contact for:

- Member benefits, eligibility information, or waivers  
- Deductible, coinsurance and/or copay information  
- Explanation of payments/vouchers  
- In-network physicians and providers and changes
- Claim questions/status
- PCP changes
- Referrals or prior authorization questions
- Appeal process
- Accident information

**Claims Billing**

**Commercial:** See the back of the PacificSource member ID card.

**Mail Medicaid claims to:**
PacificSource Community Solutions
PO Box 7068
Springfield, OR 97475-0068

**Mail Medicare claims to:**
PacificSource Medicare
PO Box 7068
Springfield, OR 97475-0068

**Credentialing**

**Phone:** (541) 684-5580
**Toll-free:** (800) 624-6052, ext. 3747
**Fax:** (541) 225-3644
**Email:** credentialing@pacificsource.com

**Contracting/Reporting**

**Phone:** (541) 684-5580
**Toll-free:** (800) 624-6052, ext. 2580
**Fax:** (541) 225-3643
**Commercial Email:**
- Idaho: IDcontracting@pacificsource.com
- Montana: MTcontracting@pacificsource.com
- Oregon: ORcontracting@pacificsource.com
- Washington: WAcontracting@pacificsource.com
- All States: providercontracting@pacificsource.com
- Medicaid Email: providernet@pacificsource.com
- Medicare Email: providercontracting@pacificsource.com

**Contact for:**
- Direct credentialing inquiries
- Direct credentialing application status
- Direct recredentialing inquiries
Dental

Commercial Dental Customer Service

Phone: (541) 225-1981  
Toll-free: (866) 373-7053  
Fax: (541) 684-5564  
Email: dental@pacificsource.com

8:00 a.m. to 5:00 p.m. PT

Medicaid Dental Providers

Please contact your dental care organization (DCO) for contracting information.

Medicaid Dental Services

Advantage Dental Services: Toll-free (866) 268-9631, TTY: 711  
Capital Dental Care: Toll-free (800) 525-6800, TTY: 711  
ODS Community Health: Toll-free (800) 342-0526, TTY: 711

Health Services

Monday through Friday, 8:00 a.m. to 5:00 p.m.

After normal business hours, calls to Health Services are forwarded to voice mail. A staff member will return the call the next business day. Any email communication received after hours will be answered the following business day.

Commercial:

Phone:
Oregon: (541) 684-5584, (888) 691-8209, ext. 2584  
Idaho: (208) 333-1563, (800) 688-5008  
Montana: (406) 442-6595, (877) 570-1563  
TTY: 711

Fax:
Oregon: (541) 225-3625  
Idaho: (208) 395-2697  
Montana: (406) 441-3378

Email: healthservices@pacificsource.com

Medicaid:

Behavioral Health
Phone: (541) 382-5920, (800) 431-4135  
Fax: (541) 330-4910
Preapproval/Referrals
Phone: (541) 330-7301
TTY: (800) 431-4135

Intensive Care Management and Care Coordination
Phone: (541) 330-2507
Toll-free: (888) 970-2507

Utilization Review
Phone: (541) 330-7301
TTY: (800) 431-4135

Medicare
Phone:
Oregon: (541) 330-7304
Idaho: (208) 433-4624
Toll-free: (888) 863-3637
TTY: 711

Fax:
Oregon: (541) 382-2952
Idaho Authorization and Referrals: (208) 395-2697
Idaho Utilization Review: (208) 395-2696

Contact for:
- Referrals
- Care/case management
- Utilization review
- Preauthorization/prior authorization
- Out-of-network referral information
- Specific medical necessity criteria/guidelines

Pharmacy Services
Phone: (541) 330-4999
Toll-free (888) 437-7728
TTY: 711

Contact for:
- Exceptions to standard formulary rules
- Prior authorization for all medications (medically administered and pharmacy)
- Clinical consultation
- Care planning for patients with complex needs
Grievance and Appeals

Medicare and Medicaid:

Medicare Toll Free: (888) 863-3637
Medicaid Toll Free: (800) 431-5920
Phone: (541) 330-4992
Fax: (541) 322-6424

Commercial:

Phone: (800) 624-6052
Fax: (541)225-3632
Email: lc@pacificsource.com

Provider Network Department

Physician/provider support and education

Phone: (541) 684-5580, (800) 624-6052, ext. 2580
TTY: 711
Fax: (541) 225-3643
Email: providernet@pacificsource.com

Contact for:

- Physician/provider contract support
- Explanations of medical, administrative, or reimbursement policies
- General education on proper methods to use for billing and coding
- Questions about web connectivity to PacificSource
- Provider location changes
- Call share maintenance
- Physician/provider network information
- Limited practice designations
- Demographic updates, including tax identification numbers
- Physician/provider credentialing

The Provider Network department operates as a liaison between PacificSource and healthcare professionals. Recognizing the needs and perspectives of in-network physicians and providers, Provider Network is dedicated to giving our physicians and providers the highest quality service, with a commitment to working with practitioners in a fair, honest, and timely fashion.

In our Provider Network Department, Provider Service Representatives have the following defined purposes and responsibilities:

- Develop and provide support services to new and established contracted physicians and providers for the purpose of contract education, compliance, and problem solving, and to ensure satisfaction with PacificSource.
• Provide liaison support internally for physician and provider related issues, including questions or concerns regarding contracts and operations.

• Develop educational materials for meetings and/or mailings as needed.

• Develop and maintain a Provider Manual outlining general information about PacificSource policies and procedures applicable to healthcare professionals.

• Present contracted physicians and providers to members via current and accurate provider directories.

• Identify and pursue opportunities for provider network expansion and enhanced member access to healthcare.
3. Glossary

**Access**: Ability to obtain medical services.

**Accreditation**: Accreditation programs give an official authorization or approval to an organization against a set of industry-derived standards.

**Actuary**: A person in the insurance field who determines insurance policy rates and conducts various other statistical studies.

**Adjudication**: Processing a claim through a series of edits to determine proper payment.

**Administrative Services Only (ASO) Contract**: A contract between an insurance company and a self-insured plan where PacificSource performs administrative services only; for example, claims processing.

**Allied Health Professional (AHP)**: All healthcare providers who are not licensed as doctors of medicine or osteopathy; for example, nurse practitioners, physician assistants, and chiropractors.

**Alternative Care**: Medical care received in lieu of inpatient hospitalization. Examples include outpatient surgery, home healthcare, and skilled nursing facility care. It also may refer to nontraditional care delivered by providers, such as acupuncturists.

**Ambulatory Care**: Healthcare services rendered in a hospital’s outpatient facility, physician’s office, or home healthcare; often used synonymously with the term “outpatient care.”

**Ancillary Medical Service**: Covered service necessary for diagnosis and treatment of members. Includes, but is not limited to, ambulance, ambulatory or day surgery, durable medical equipment, imaging service, laboratory, pharmacy, physical or occupational therapy, urgent or emergency care, and other covered service customarily deemed ancillary to the care furnished by primary care or specialist physicians or providers.

**Annual Enrollment Period (AEP)**: A set time each fall when Medicare members can change their health or drugs plans or switch to Original Medicare. The Annual Enrollment Period is from October 15 until December 7.

**Appeal Process for Terminated Providers**: The system for the receipt, handling, and disposition of provider complaints and grievances in regards to contract termination, as described in the PacificSource Policies and Procedures.

**Balance Billing**: Sometimes referred to as extra billing, is the practice of a healthcare provider billing a patient for the difference between what the patient’s health insurance chooses to reimburse and what the provider chooses to charge.

**Behavioral Healthcare**: Treatment of mental health and/or substance use disorders.

**Benefit Package/Plan**: Specific services provided by the insurance carrier. Covered services, copayments or deductible requirements, limitations, and exclusions contained in the contract between PacificSource and a member or subscriber group.

**Board Certified**: A physician who has passed an examination given by a medical specialty board.

**Board Eligible**: A physician who has graduated from an approved medical school and is eligible to take a specialty board examination.

**Call Share**: The physicians or providers on whom a practitioner relies for backup coverage during times they are unavailable.
Call Share Group: A group of providers with similar specialties who have joined together to provide call share services.

Capitation: A method of paying for medical services on a per-person rather than a per-procedure basis.

Carrier: Insurer, underwriter of risk.

Carve Out: Medical services that are specifically identified in a contract and paid under a different arrangement.

Care/Case Management: The process whereby a healthcare professional supervises the administration of medical or ancillary services to a patient, typically one who has a catastrophic disorder or who is receiving mental health services. Care/case managers reduce the costs associated with the care of such patients, while providing high-quality medical services.

Case Rate: A “package price” for a specific procedure or diagnosis-related group.

Centers for Medicare and Medicaid Services (CMS): The agency within the Department of Health and Human Services that administers the Medicare program.

Certified Interpreter: A person who is certified as competent interpreter by a professional organization or government entity through rigorous testing based on appropriate and consistent criteria. This includes passing a standardized national test.

Clean Claim: (1) A claim that has no defect, impropriety, lack of any required substantiating documentation (consistent with § 422.310(d)) or particular circumstance requiring special treatment that prevents timely payment; and (2) A claim that otherwise conforms to the clean claim requirements for equivalent claims under original Medicare.

Clinic: A healthcare facility for providing preventive, diagnostic, and treatment services to patients in an outpatient setting.

Clinical Quality Utilization Management (CQUM) Committee and Pharmacy & Therapeutics Committee: The CQUM Committee promotes quality and oversees performance improvement projects, identifies topics for quality and performance improvement efforts, and oversees and evaluates quality and performance improvement plans. The Pharmacy & Therapeutics Committee (P&T) maintains drug formularies, reviews and approves pharmaceutical coverage policies for all lines of business including PacificSource Health Plans (Commercial), PacificSource Community Health Plans (Medicare), and PacificSource Community Solutions (Medicaid).

Closed Grievance (also see Grievance): A decision that has been made which cannot be appealed or is not under appeal by the member.

Coinsurance: A policy provision under which the insured pays or shares part of the medical bill, usually according to a fixed percentage.

Consolidated Omnibus Budget Reconciliation Act (COBRA): A law that requires employers to offer continued health insurance coverage to eligible employees whose health insurance coverage terminates.

Coordination of Benefits (COB): An insurance provision that allocates responsibility for payment of medical services between carriers if a person is covered by more than one insurance plan.

Coordinated Care Organization (CCO): A network of all types of healthcare providers who have agreed to work together in their local communities for people who receive health care coverage under the Oregon Health Plan (Medicaid).

Copay, copayment: The portion of the claim or medical expense that a member (or covered insured) must pay out of pocket.
**Cost Containment:** A strategy that aims to reduce healthcare costs and encourages cost-effective use of services.

**Cost Sharing:** A general set of financing arrangements via deductibles, copayments, or coinsurance in which a person covered by a health plan must pay some of the cost to receive care.

**Coverage:** Services or benefits provided through a health insurance plan.

**Covered Lives:** Total of insured members.

**Covered Services:** Healthcare services which a member is entitled to receive from PacificSource.

**Credentialing:** A process of screening, selecting, and continuously evaluating individuals who provide independent patient care services based on their licensure, education, training, experience, competence, health status, and judgment.

**Deductible:** The portion of the member’s healthcare expenses that must be paid out of pocket before any insurance coverage is applied.

**Dependents:** Eligible family members of the subscriber covered by a health insurance plan.

**Dental care organization (DCO):** A corporation or entity that enters into a service agreement with PacificSource Community Solutions for the provision of dental services to PacificSource Community Solutions members. DCOs also maintain the dental provider network.

**Diagnosis-Related Groups (DRG):** A program in which hospital procedures are rated in terms of cost and intensity of services delivered. A standard rate per procedure is paid, regardless of the cost to the hospital to provide that service.

**Disability:** Any medical condition that results in functional limitations that interfere with an individual’s ability to perform his/her normal work, and results in limitations in major life activities.

**Distant Site:** The physical location of the eligible health care provider.

**Dual Eligible:** Dual eligibles are individuals who are entitled to Medicare Part A and/or Part B and are eligible for some form of Medicaid benefit. PacificSource Dual eligibles are enrolled in the lowest cost PacificSource Medicare Advantage Plan offered in their service area, as well as PacificSource Community Solutions.

**Dual Option:** The choice between two or more different insurance arrangements for medical care (for example, indemnity or a coordinated care organization plan).

**Durable Medical Equipment (DME):** Equipment that can be repeatedly used, is primarily and customarily used to serve a medical purpose, is generally not useful to a person in the absence of illness or injury, and is appropriate for use at home. Examples include hospital beds, wheelchairs, and oxygen equipment.

**Emergency Medical Condition:** A medical condition that manifests itself by symptoms of sufficient severity to convince a prudent layperson that failure to receive immediate medical attention would place the health of a person (or a fetus in the case of a pregnant woman), in serious jeopardy. Examples include heart attacks, cardiovascular accidents, poisonings, and loss of consciousness or respiration.

**Emergency Medical Screening Exam:** The medical history, examination, ancillary tests, and medical determinations required to ascertain the nature and extent of an emergency medical condition.

**Emergency Services:** Covered services that are: 1) rendered by a provider qualified to furnish emergency services; and 2) needed to evaluate or stabilize an emergency medical condition. PacificSource expands the definition as the sudden and unexpected onset of a condition requiring immediate medical or surgical care, which the member secures immediately after the onset, or as soon thereafter as can be made available, but in any case no longer than 24 hours after the onset.
Enrolled Group (see also Contract Group): A group of persons enrolled in a health plan through their employer or other common organization of which the persons are members.

Enrollee: A person eligible for service as either a subscriber or a dependent.

Enrollment: The process by which an individual becomes a subscriber for coverage in a health plan.

Episode of Care: All treatment rendered in a specified time frame for a specific disease.

Evidence of Coverage (EOC) and Disclosure Information: This document, along with member enrollment form and any other attachments, riders, or other optional coverage selected, which explains member coverage, what we must do, member rights, and what he or she has to do as a member of our plan.

E-visit: E-visits refers to communication between a patient and providers through an online patient portal or email, not in real time. Email visits must meet the following criteria: The provider must use encrypted or authenticated email for online medical evaluation visits as described in current CMS criteria. Standard email is not acceptable, as it is not secure, has no “terms of use” or legal disclaimers in place to protect the patient or provider, and can easily expose patient PHI including email addresses and contents of consultation discussion to unintended third parties.

Experience Rating: Rating system by which a plan determines the capitation rate or premium based on the experience of the individual group enrolled.

Experimental Procedures: Also called unproved procedures. All healthcare services, supplies, treatments, or drug therapies that PacificSource has determined are not generally accepted by healthcare professionals as effective in treating the illness for which their use is proposed.

Extended Care Facility: A nursing home-type setting that offers skilled, intermediate, or custodial care.

Fee-for-Service: The traditional method of paying for medical services. A doctor charges a fee for each service provided and the insurer pays all or part of that fee.

Fee Schedule: List of fees for specified medical procedures.

Formulary: List of covered drugs. The list can vary according to health plan.

Full Risk: An arrangement where PacificSource has given the medical group or provider organization financial responsibility for the comprehensive healthcare needs of the patient. Full risk includes both the institutional and professional components of capitation with no sharing of savings with the health plans and generally includes home health, skilled nursing facilities, ambulance, and acute hospital and physician services.

Grievance: A written complaint submitted by, or on behalf of, a member regarding any of the following: the availability, delivery, or quality of healthcare services; utilization review decisions; claims payment, handling or reimbursement for healthcare services; or the contractual relationship between a member and an insurer.

Health Maintenance Organization (HMO): A Health Maintenance Organization plan is a Medicare Advantage Plan that has a network of contracted providers that have agreed to treat plan members for a specified payment amount. A HMO plan will cover all plan benefits only when they are received from in-network providers, unless noted otherwise.

Health Risk Assessment: A health questionnaire, used to provide individuals with an evaluation of their health risks and quality of life.

Hospice: A healthcare service that provides supportive care for the terminally ill.
Independent Physician Association or Individual Practice Association (IPA): An individual practice association of physicians and/ or providers that have entered into a contract with PacificSource to provide certain specific covered services to members.

Inpatient Care: Healthcare provided in a licensed bed in a hospital, nursing home, or other medical or psychiatric institution.

Inquiry: A written request for information or clarification about any matter related to the member’s health plan. An inquiry is not a complaint.

Intensive Care Coordination Services (ICC): Intensive Care Coordination refers to the specialized services described in OAR 410-141-3870. These services have, in other contexts, been labeled Exceptional Needs Care Coordination.


Joint Commission on Accreditation of Healthcare Organizations (JCAHO): A private, nonprofit organization that evaluates and accredits healthcare organizations providing mental health care, ambulatory care, home care, and long-term care services.

Locum Tenens Provider: A provider who is not credentialed or contracted with PacificSource, but who is allowed to see and treat members enrolled in our products on behalf of their normal practitioner who may be unavailable for a period of time.

Loss Ratio: The ratio of a health maintenance organization’s actual incurred expenses to total premiums.

Managed Care: A system of healthcare delivery developed to manage the cost, quality, and access of care. It is characterized by a contracted panel of physicians and/or providers; use of a primary care practitioner; limitations on benefits provided by noncontracted physicians and/or providers; and a referral authorization system for obtaining care from someone other than the primary care practitioner.

Managed Care Coordinator/Committee: An individual and/or committee that receives referral authorization requests and, based on a strict set of criteria, either approves or denies a request for referral authorization.

Managed Care Organization (MCO): A corporation, governmental agency, public corporation, or other legal entity that is certified as meeting the criteria adopted by the Oregon Health Authority to be accountable for care management and to provide integrated and coordinated healthcare for each of the organization’s members.

Managed Fee-for-Service Product: Plan in which the insurer pays the cost of covered services after the services have been used. Various managed care tools such as preauthorization, second surgical opinion, and utilization review are used to control inappropriate utilization.

Medicaid: Medicaid is a federal-state health insurance program for low-income U.S. citizens. Medicaid also covers nursing home care for the indigent elderly. Medical assistance is a joint federal and state program that helps with medical costs for some people with low incomes and limited resources. Medicaid programs vary from state to state, but most healthcare costs are covered if you qualify for both Medicare and Medicaid.

Medical Group: A group of physicians and/or providers organized as a single professional entity that is recognized under state law as an entity to practice a medical profession.
Medical Services Contract: A contract to provide medical or mental health services that exists between an insurer, physician or provider, and independent practice association; between an insurer and a physician or provider; between an independent practice association and a provider or organization of providers; between medical or mental health clinics; or between a medical or mental health clinic and a physician or provider. This does not include a contract of employment or a contract creating legal entities and ownership thereof that are authorized under ORS chapters 58, 60 or 70, or other similar professional organizations permitted by statute.

Medically Necessary Covered Services: Services, supplies, or drugs received that are needed for the prevention, diagnosis, or treatment of a medical condition and meet the accepted standards of medical practice.

Medicare: The federal health insurance program for people 65 years of age or older, some people under age 65 with certain disabilities, and people with End-Stage Renal Disease (generally those with permanent kidney failure who need dialysis or a kidney transplant). People with Medicare can get their Medicare health coverage through Original Medicare, a Medicare Advantage Plan, or other Medicare plans.

Medicare Advantage: An alternative to the traditional Medicare program in which private plans run by health insurance companies provide healthcare benefits that eligible members would otherwise receive directly from the Medicare program.

Sometimes called Medicare Part C. A plan offered by a private company that contracts with Medicare to provide Medicare Part A and Part B benefits. A Medicare Advantage Plan can be an HMO, PPO, a Private Fee-for-Service (PFFS) plan, or a Medicare Medical Savings Account (MSA) plan. When enrolled in a Medicare Advantage Plan, Medicare services are covered through the plan, and are not billed directly to Original Medicare. In most cases, Medicare Advantage Plans also offer Medicare Part D (prescription drug coverage). These plans are called Medicare Advantage Plans with Prescription Drug Coverage. Everyone who has Medicare Part A and Part B is eligible to join any Medicare health plan that is offered in their area, except people with End-Stage Renal Disease.

Medicare Advantage Disenrollment Period: A set time each year when members in a Medicare Advantage plan can cancel their plan enrollment and switch to Original Medicare. The Medicare Advantage Disenrollment Period is from January 1 until February 14.

Medicare Open Enrollment Period: The time period between November 15 and December 7 each year. Also called Annual Enrollment Period in which an individual enrolls in a Medicare plan or makes plan changes in their Medicare healthcare coverage.

Member (Member of Our Plan, or Plan Member):

- Any commercial plan PacificSource subscriber or dependent as determined by PacificSource.
- A person with Medicaid who is eligible to get covered services, and who has been assigned to the CCO by the Oregon Health Plan (OHP).
- A person with Medicare who is eligible to get covered services, who has enrolled in our plan, and whose enrollment has been confirmed by the Centers for Medicare and Medicaid Services (CMS).

Negotiated Discount: Method of reimbursement for contracted physicians and providers that stipulates a specific percentage by which a charge may be reduced if included in the physician’s or provider’s contract or agreement.

Network: The doctors, clinics, health centers, medical group practices, hospitals, and other providers that PacificSource has selected and contracted with to provide healthcare for its members.
Network Pharmacy: A network pharmacy is a pharmacy where members of our plan can get their prescription drug benefits. We call them “network pharmacies” because they contract with our plan. In most cases, your prescriptions are covered only if they are filled at one of our network pharmacies.

Network Physician or Provider: An individual physician or provider who has entered into an agreement with an IPA, or other association of healthcare practitioners to provide certain contracted services to PacificSource members.

Never Event: A list of serious medical errors or adverse events (for example, wrong site surgery or hospital-acquired pressure ulcers) that should never happen to a patient. The Centers for Medicare and Medicaid Services (CMS) defines never events as “serious, preventable, and costly medical errors.”


Noncovered Services: Those services excluded from coverage by PacificSource. These may also be called “un-covered benefits.”

Nonemergent Condition: Routine physical or eye examinations, diagnostic work-ups for chronic conditions, routine prenatal care, elective surgery, and scheduled follow up visits for prior emergency conditions. In these instances, no benefits are payable for service/treatment provided in an emergency room setting.

Non-Emergent Medical Transportation Services (NEMT): Non-Emergent Medical Transport, or NEMT, is how a Medicaid member can get a ride to a covered healthcare appointment. This is for scheduled healthcare appointments, not emergencies.

Nonparticipating Physician Provider: A healthcare physician or provider who has not contracted with a PacificSource panel or network.

Organizational Determination: The Coordinated Care Organization (CCO) has made an organization determination when it makes a decision about whether services are covered. The CCO’s network provider or facility has also made an organization determination when it provides a member with an item or service, or refers a member to an out-of-network provider for an item or service. Organization determinations are called “coverage decisions” in this manual. Oregon Health Authority uses the terms “prior authorization” or “claim” to refer to organizational determination.

The Medicare Advantage organization has made an organization determination when it makes a decision about whether services are covered or how much a member will have to pay for covered services. The Medicare Advantage organization’s network provider or facility has also made an organization determination when it provides a member with an item or service, or refers a member to an out-of-network provider for an item or service. Organization determinations are called “coverage decisions” in this manual.

Original Medicare (Traditional Medicare or Fee-for-service Medicare): Original Medicare is offered by the government, and not a private health plan like Medicare Advantage Plans and prescription drug plans. Under Original Medicare, Medicare services are covered by paying doctors, hospitals, and other healthcare providers’ payment amounts established by Congress.

Originating Site: The physical location of the patient receiving telemedical health services.

- Office of a qualified health care professional
- A hospital (Inpatient or Outpatient)
- Critical Access Hospital (CAH)
• Rural Health Clinic (RHC)
• Federal Qualified Health Center (FQHC)
• A hospital based or critical access hospital based renal dialysis center
  – Independent Renal Dialysis facilities are not eligible originating sites
• Skilled Nursing Facility (SNF)
• Mobile Stroke Unit
• Patient Home (Commercial and Medicaid)

Out-of-Area: Any area that is outside the PacificSource plan service area.

Out-of-network/out-of-Panel Physician or Provider: A physician or provider who is not a part of the panel or network, or who has not contracted with PacificSource.

Outpatient Care: Care given to a person not requiring a stay in a licensed hospital or nursing home bed.

PacificSource Community Solutions: A healthcare service contractor licensed under state law and the Centers for Medicare and Medicaid Services (CMS) to provide comprehensive healthcare services for Medicaid members enrolled through the Oregon Health Plans (OHP).

PacificSource Health Plans: A healthcare service contractor licensed under state law that contracts for the provision of comprehensive healthcare services for its members enrolled in various benefit plans.

PacificSource Medicare: A healthcare service contractor licensed under state law and the Centers for Medicare and Medicaid Services (CMS) to provide comprehensive healthcare services for its Medicare members enrolled in various benefit plans.

PacificSource Policies and Procedures: The terms and conditions adopted by PacificSource for the administration of health benefits.

Palliative Care: Patient and family centered care that optimizes quality of life by anticipating, preventing, and treating suffering in terminally ill patients.

Panel Physician or Provider: An individual physician or provider who has entered into an agreement with an IPA, or other association of healthcare practitioners to provide certain contracted services to PacificSource members.

Part A: A hospital Medicare insurance plan including nursing care and hospital stays.

Part B: Part of original Medicare and covers services and supplies deemed medically necessary to treat a health condition including outpatient care, preventive services, ambulance services, and durable medical equipment.

Part C: These are Medicare Advantage Plans including HMO and PPO that administer Medicare Part A and Part B Benefits through Private Insurance plans on behalf of Original Medicare.

Part D: The voluntary Medicare Prescription Drug Benefit Program. (For ease of reference, we will refer to the prescription drug benefit program as Part D.)

Participating Provider Panel: An IPA or other association of physicians and/or providers organized as a single professional entity, which enters into a service agreement with PacificSource for the provision of certain covered services to PacificSource members.

Patient-Centered Primary Care Home: A care delivery model where member treatment is coordinated through his/her primary care practitioner in a centralized setting.

PCP: See Primary Care Practitioner.
**Per Diem:** The negotiated daily payment rate for delivery of all inpatient or residential services provided in one day, regardless of the actual services provided. Per diems can also be developed by type of care (for example, one per diem rate for general medical/surgical care and a different rate for intensive care).

**Per Member Per Month (PMPM):** A negotiated rate of payment per enrollee per month. A fixed amount determined by a negotiated rate between an insurance carrier and physician or provider.

**Physician-Hospital Organization (PHO):** A healthcare delivery organization including both physicians and providers and a hospital or hospitals, which has entered into a contract with PacificSource to provide specified covered services to members.

**Plan:** See Group Health Plan.

**Plan Administration:** Management of a plan, including accounting, billing, personnel, marketing, legal services, purchasing, and servicing of accounts.

**Plan Sponsorship:** A group that organizes the group health plan, oversees its facilities, and provides managerial authority.

**Point of Service:** A health plan that allows members to choose an in-network or out-of-network provider (with or without a referral), with benefit levels that differ depending on whether or not the provider is in the plan's network.

**Policyholder:** The employer or individual to which a contract is issued and in whose name a policy is written. In a plan contracted directly with the individual or family, the policyholder is the individual to whom the contract is issued.

**Portability:** Access to continuous health coverage so the insured does not lose insurance coverage due to any change in health or personal status (such as employment, marriage, or divorce).

**Preauthorization/prior authorization:** An approval process prior to the provision of services, usually requested by the physician or provider. Factors determining authorization may be eligibility, benefits of a specific plan, or setting of care.

**Preapproval:** A medical review process prior to the provision of services, usually requested by the physician or provider. Factors determining authorization may be eligibility, benefits of a specific plan, or setting of care.

**Pre-existing Condition:** Physical condition of an insured person that existed before the issuance of a policy or enrollment in a plan.

**Preferred Provider Organization (PPO):** Fee-for-service product where participants have financial incentives to seek care from in-network physicians and providers, but are allowed to go to out-of-network physicians and providers at a reduced benefit.

**Premium:** The amount paid for health insurance.

**Preventive Care:** An approach to healthcare emphasizing preventive measures, such as routine physical exams, diagnostic tests (e.g., PAP tests), and immunizations.

**Primary Care Dentist (PCD):** The dentist who a member chooses or is assigned to by the dental care organization. Similar to a PCP, the PCD will provide or help coordinate the member’s dental care.
Primary Care Provider (PCP): Physician or provider selected by a member who shall have the responsibility of providing initial and primary care and for referring, supervising, and coordinating the provision of all other covered services to the member. A PCP may be either a family physician or provider, general practitioner, internist, pediatrician, obstetrician, gynecologist, or other practitioner or nurse practitioner who has otherwise limited his/her practice of medicine to general practice or a specialist practitioner who has agreed to be designated as a primary care practitioner. Managed Care plans require that each enrollee be assigned to a primary care practitioner.

Prioritized List: The Oregon Health Evidence Review Committee (HERC) ranks healthcare condition and treatment pairs in order of clinical effectiveness and cost effectiveness.

Protocol: Description of a course of treatment or an established practice pattern.

Provider: (1) Any individual who is engaged in the delivery of healthcare services in a state and is licensed or certified by the state to engage in that activity in the state; and (2) any entity that is engaged in the delivery of healthcare services in a state and is licensed or certified to deliver those services if such licensing or certification is required by state law or regulation.

Qualified Interpreter: An individual who has been assessed for professional skills, demonstrates a high level of proficiency in at least two languages and has the appropriate training and experience to interpret with skill and accuracy while adhering to the National Code of Ethics and Standards of Practice published by the National Council on Interpreting in Healthcare. A qualified interpreter will have:

- A high school diploma.
- 60 hours interpreter training approved by the Oregon Health Authority (OHA).
- Proof of language proficiency in English and target language.
- Their name listed on OHA's Health Care Interpreter (HCI) Registry. More information is available at https://apps.Oregon.gov/SOS/LicenseDirectory.

Quality Assurance Program: A program and process that is carried out by PacificSource and contracted physicians and providers to monitor, maintain, and improve the quality of services provided to members as described in PacificSource Policies and Procedures.

Quality Improvement Organization (QIO): A group of practicing doctors and other healthcare experts paid by the federal government to check and improve the care given to Medicare patients.

Quality Improvement Program (QIP): CMS requires Medicare Advantage plans to conduct a QIP each year. Each project runs a minimum of three years. We strive to improve member outcomes and assist providers with their treatment plans.

Our Quality Improvement Program is under the direction of our medical director and managed by our quality department. This program works in collaboration with practitioners in our plan network. The program foundation is built on evidence based guidelines and state and national regulations.

The Quality Improvement Program is intended to:

- Ensure access and enhance the quality of healthcare.
- Improve customer satisfaction.
- Maximize the safety and quality of healthcare delivered to members.
- Improve efficiency and effectiveness.
- Fulfill quality related reporting requirements.

Referral: The process by which the member’s primary care practitioner directs the member to seek and obtain covered services from other physicians and providers.
Reinsurance: Insurance purchased by a carrier from another insurance company to protect itself against all or part of the losses that may be incurred by claims for its members (e.g., catastrophic care).

Related Entity: Any entity that is related to the health plan by common ownership or control and (1) performs some of the health plan’s management functions under contract or delegation; (2) furnishes services to Medicaid or Medicare enrollees under an oral or written agreement; or (3) leases real property or sells materials to the health plan at a cost of more than $2,500 during a contract period.

Resource-Based Relative Value Scale (RBRVS): A financing mechanism that reimburses healthcare providers on a classification system.

Risk: A possibility that revenues of the insurer will not sufficiently cover expenditures incurred in the delivery of contractual services.

Risk Contract: An arrangement through which a healthcare provider agrees to provide a full range of medical services to a set population of patients for a prepaid sum of money or a predetermined budget. The physician or provider is responsible for managing the care of these patients, and risks losing money if total expenses exceed the predetermined amount of funds.

Risk Pool: A category of services that are subject to some type of projected expense target. Typically, amounts over or under this target are shared with the medical group “at risk” for these services.

For example, if the risk pool is set at $25.00 (per member per month) for hospital services and the actual amount comes in at $26.00, the $1.00 over the targeted amount may be deducted from other areas of reimbursement to the medical group.

Risk Sharing: An arrangement in which financial liabilities are apportioned between two or more entities. For example, PacificSource and a provider may each agree to share the risk of excessive healthcare cost over budgeted amounts on a 50-50 basis.

Self-Insured: Management in which health services are delivered by physicians and/or providers, but the cost of these services is covered by the member’s employer, instead of by the insurance firm.

Service Areas: Geographic areas covered by a PacificSource insurance plan where direct services are provided.

Skilled Nursing Facility (SNF): A facility, either freestanding or part of a hospital, that accepts patients in need of rehabilitation and/or medical care that is of a lesser intensity than that received in a hospital.

Solo Practice: Individual practice of medicine by a physician or provider who does not practice in a group or share personnel, facilities, or equipment, with other physicians.

Specialist Physician/Provider: A physician or provider whose training and expertise are in a specific area of medicine.

Stabilization: A state in which, within reasonable medical probability, no material deterioration of an emergency medical condition is likely to occur.

Step Therapy: A utilization tool that requires members to first try another drug to treat a medical condition before we will cover the drug a physician may have initially prescribed.

Stop-Loss: Risk protection from withhold losses resulting from claims greater than a specific dollar amount per member per year.

Subrogation: When healthcare costs of enrollees are the responsibility of an entity other than the insurer, such as workers’ compensation, third party negligence liability, or automobile medical coverage.
Subscriber: The person who is responsible for payment to PacificSource, or whose employment or other status (except for family dependency), is the basis for eligibility for membership in PacificSource.

A person who is covered by Medicare and who has chosen to get their Medicare healthcare and/or prescription drug coverage through PacificSource Medicare.

Supplemental Medicare: A plan that covers some copayments, deductibles, and other services not covered under traditional Medicare.

Telehealth or Telemedicine: Refers to consultations with a qualified healthcare professional provided in real-time over an electronic mechanism. These services are rendered to patients using electronic communications such as secure email, patient portals and online audio and/or video.

Tertiary Care: Healthcare services that are not available through a community hospital setting. This may include complex cancer procedures, transplants, and neonatal intensive care.

Third Party Administrator (TPA): An independent person or corporate entity that administers group benefits, claims, and administration for a self-insured group or insurance company. A TPA does not underwrite risk.

Third Party Payment: Payment for healthcare by a party other than the member.

Triage: The classification of sick or injured persons, according to severity, in order to direct care and ensure efficient use of medical and nursing staff and facilities.

Urgent Care Clinic: A healthcare facility whose primary purpose is the provision of immediate, short-term medical care for minor, but urgent, medical conditions.

Urgently Needed Care: Urgently needed care is care provided to treat a non-emergency, unforeseen medical illness, injury, or condition that requires immediate medical care. Urgently needed care may be furnished by in-network providers or by out-of-network providers when in-network providers are temporarily unavailable or inaccessible.

Utilization: The extent to which the members of a covered group use the services or procedures of a particular healthcare benefit plan.

Utilization Review: A set of formal techniques used by (or delegated by) an insurer that are designed to monitor the use of or evaluate the medical necessity, appropriateness, efficacy, or efficiency of healthcare services, procedures, or settings.

Utilization Management Program: The programs and processes established and carried out by PacificSource with the cooperation of contracted physicians and providers to authorize and monitor the utilization of covered services provided to subscribers.

Virtual Check-in: For established patients to have a brief communications with practitioners via telephone or other telecommunication devices to decide if an office visit or other services are needed.
4. Credentialing

4.1 Credentialing

PacificSource credentialing standards follow the guidelines of the National Committee on Quality Assurance (NCQA) and Centers for Medicare and Medicaid Services (CMS). The credentialing process includes meticulous verification of the education, experience, judgment, competence, and licensure of all healthcare providers.

PacificSource believes the emphasis on credentialing further demonstrates a commitment to qualified healthcare physicians and providers performing services our members require.

Please remember that PacificSource requires all providers rendering services to be individually credentialed before they can be considered an in-network provider under the provider contract.

PacificSource does not allow “incident to” billing for providers that are eligible for credentialing and practicing under their scope of license.

Provider Types to Credential

The following practitioners and organizational providers are eligible to be considered as PacificSource in-network providers, provided they meet credentialing requirements.

Physicians and Dentists
- Dentist*
- Doctor of Medicine
- Doctor of Osteopathy
- Oral Surgeon, Doctor of Dental Medicine*
- Podiatrist

Allied Healthcare, Mental Health, and Substance Abuse Providers
- Audiologist
- Behavior Analyst or Assistant Behavior Analyst, Board Certified
- Behavior Analyst, Doctorial Level
- Behavior Analyst Interventionist
- Certified Registered Nurse Anesthetist
- Clinical Nurse Specialist
- Genetic Counselor
- Hearing Aid Fitter/Specialist
- Lactation Consultants (License and Certification is state specific)
- Licensed Clinical Professional Counselor
- Licensed Clinical Social Worker
- Licensed Dietician
- Licensed Marriage and Family Therapist
• Licensed Midwives (Washington only)
• Licensed Professional Counselor (also known as Licensed Mental Health Counselor)
• Nurse Practitioner
• Occupational Therapist
• Optometrist
• Pharmacist (Billing under a medical benefit)*
• Physical Therapist
• Physician Assistant
• Psychologist
• Psychologist Associate (Practicing without supervision)
• Speech /Language Pathologist

Please note:
Certified Nurse First Assist, Certified First Assist (CFS), Certified Surgical Technicians, Surgical Assistants, and Registered Nurse must bill under the overseeing doctor’s tax identification number.

In Oregon, psychologist associates and the supervising licensed psychologist must have an agreement to provide continued supervision of the professional work of a licensed psychologist associate by the Oregon Board of Psychologist.

Alternative Care Practitioners
• Acupuncturist
• Chiropractor
• Licensed Massage Therapist
• Naturopath

Organizational Providers
• Hospitals (including longer term acute care (LTAC)
• Home Health Agencies
• Hospices
• Skilled Nursing Facilities
• Sleep Study Labs
• Free-standing Ambulatory Surgery Centers
• Behavioral Health Facilities (providing mental health or substance abuse services in an inpatient, residential or ambulatory setting)
• Birthing Centers
• Home Infusion
• Clinical Laboratories
• Comprehensive Outpatient Rehabilitation Facilities
• End-Stage Renal Disease Dialysis Centers
• Medicare Certified Diabetes Prevention Programs
• Portable X-ray Supplies
• Rural Health Clinics
• Federally Qualified Health Centers
• Independent Diagnostic Testing Facilities
• Durable Medical Equipment Suppliers
• Public Health Centers

*Credentialing is required for dentists, oral surgeons, and pharmacists providing care under medical benefits only.

Credentialing is required for telemedicine practitioners who have an independent relationship with PacificSource, and who provide treatment services under PacificSource’s medical benefit.

Credentialing is required for practitioners who have entered into a Supervising Practice Agreement with a Physician Assistant who is applying for network participation and credentialing with PacificSource, and who provide treatment services under PacificSource’s medical benefit.

PacificSource does not require credentialing for some types of practitioners. It is the policy of PacificSource to follow the NCQA and CMS guidelines regarding practitioners who do not need to be credentialed.

Practitioners who meet any of the following criteria are not required to be credentialed:

• Practitioners who practice exclusively within the inpatient setting and who provide care for organization members only as a result of members being directed to the hospital or other inpatient setting.
• Practitioners who practice exclusively within freestanding accredited facilities, such as freestanding mammography centers and freestanding ambulatory surgery centers, and who provide care for organization members only as a result of members being directed to the facility.
• Practitioners who enter into a contractual relationship with an employer group outside of PacificSource and provide their own network to support their members, subject to review and approval of the specific circumstances.

Examples of practitioners who may meet the above criteria that do not need to be additionally credentialed by PacificSource include, but are not limited to:

• Pathologists
• Radiologists
• Anesthesiologists
• Neonatologists
• Emergency room physicians
• Behavioral health care practitioners
• Hospitalists
• Non-licensed providers (as required by state or federal statute)

Note: Hospitalists or others who occasionally work in the private clinic setting must complete the credentialing process.

Note: Non-licensed providers will be evaluated by the Credentialing Department by the use of a checklist submitted by the organizational facility (on behalf of the provider) prior to participation. The organizational providers will be credentialed through the standard organizational provider credentialing process.
Examples of practitioners who are often hospital-based but may need to be credentialed because of an independent relationship outside the organization include, but are not limited to:

- Anesthesiologists with pain management practices
- Cardiologists and other critical care specialists
- Emergency medicine physicians

4.1.1 Initial Credentialing Process

The initial credentialing process at PacificSource involves three basic phases: application, review, and decision. The requirements and details of each phase are described below. This process can take up to 90 days upon receipt of complete application. Dental Care Organizations perform credentialing for dental providers. Refer to DCOs for applications and processing.

Phase 1: Application

Providers are required to submit an application and complete our credentialing process prior to being considered an in-network provider with PacificSource. Depending on state of practice, practitioners can either submit the Oregon Practitioner Credentialing Application (OPCA) or the Washington Practitioner Application (WPA) to begin the credentialing process. Our IPN credentialing team handles credentialing for our Montana and Idaho providers, and utilize either the IPN credentialing application for both states, or CAQH for our Montana providers. Organizational providers must complete PacificSource's Organizational Provider Credentialing Application. Please note that any new practitioners at your clinic will be considered out-of-network providers until the credentialing application is submitted and approved by our Credentialing Committee. When a provider has out-of-network status, claims are paid at the out-of-network level, which has a direct effect on your clinic and your patients.

Once the credentialing application has been completed, a copy of the application can be used in the future provided no information has changed in the interim. However, signatures and attestation statements must be no more than 180 days old at the time of the credentialing decision.

The credentialing applications are available in the Providers section of our websites (PacificSource.com, CommunitySolutions.PacificSource.com, and Medicare.PacificSource.com) or by contacting our Credentialing department at (541) 225-3747 or by email at credentialing@pacificsource.com. The Credentialing department reviews all applications upon receipt, and will communicate any information needed to complete the file. The credentialing process will not begin until all elements are received for a complete application.

Practitioner Credentialing

At a minimum, the Credentialing department will verify the following information with regard to completed applications, as applicable to the provider type:

- Current, unrestricted medical license
- Current, valid Drug Enforcement Agency (DEA) certificate
- Education and training
- Board certification
- A minimum of five years relevant work history
- Hospital privileges
- Current, adequate professional liability coverage, showing the coverage dates and limits of liability
- All professional liability claims history
Organizational Provider Credentialing:

- Current, unrestricted professional licensure, certification and/or registrations specifically required to operate as a health care organization
- Current accreditation by a recognized accrediting body, or current CMS/State survey, including corrective action plans for identified deficiencies
- Description of credentialing and clinical staff privileging program
- Appropriate policies regarding patient visitation, patient safety and the use of restraints and/or seclusion
- Current, adequate professional liability coverage, showing the coverage dates and limits of liability

Phase 2: Review

The PacificSource Credentialing department is responsible for processing credentialing requests for providers requesting to participate in our provider network. The PacificSource Credentialing Committee evaluates provider candidates for credentialing and makes the final determination on credentialing requests. The Credentialing Committee is also responsible for developing credentialing criteria based on applicable standards, and applying those criteria in a fair and impartial manner.

The Credentialing Committee has the right to make the final determination about which providers participate within the network. If unfavorable information about a specific provider is discovered during the credentialing process, e.g., professional liability settlements, sanctions, erroneous information, or other adverse information, the Committee may choose not to credential the provider. Applications that are not accepted are not subject to appeal.

Phase 3: Decision

Upon the Credentialing Committee’s approval, the provider will be notified in writing of their acceptance. The provider will then be recredentialed at least every three years.

Providers who are not approved or do not meet the criteria set forth by the Credentialing Committee will be notified in writing via certified mail.

If the Credentialing Committee does not approve the provider, the provider may be considered a “nonparticipating or out-of-network provider” and claims may be processed at the out-of-network benefit level. There may be reasons (e.g., fraud, inappropriate billing practices, other violations of PacificSource rules or legal boundaries) whereby claims payments may not be approved. After credentialing is complete, the provider’s in-network effective date will be the first day of the following month.

Nonlicensed Providers

Nonlicensed providers cannot be credentialed to NCQA standards. In the case when PacificSource Community Solutions is required to add these types of providers to its network, the plan will require completion of a nonlicensed provider checklist.

The checklist is to be submitted by the facility on behalf of the provider. The checklist must include all applicable education, training, background, and competencies.

The Credentialing team will evaluate the checklist using the standards outlined in OAR 309-019-0125. If the checklist meets the appropriate standards, the providers will then be considered eligible to join the network.
4.1.2 Adequate Professional Liability Coverage

PacificSource requires physicians and providers to procure and maintain appropriate general and professional liability insurance coverage. The minimum acceptable professional liability insurance includes, one million per claim/three million aggregate amount ($1,000,000/$3,000,000), and is required for all practitioners and organizational providers eligible for credentialing noted in the beginning of the Credentialing section.

4.1.3 Providers not Credentialed

Please note that certain hospital-based providers are not required by the NCQA or PacificSource to be separately credentialed by the health plan.

This exception applies to providers who practice exclusively within the inpatient setting and who provide care for the health plans’ members only as a result of members being directed to the hospital or other inpatient setting.

If you have any questions about credentialing, you are welcome to contact the PacificSource Credentialing department, a division of Provider Network Management by phone at (541) 684-5580 or (800) 624-6052, ext. 3747, or by email at credentialing@pacificsource.com.

4.1.4 Recredentialing Process

The recredentialing process will be conducted on each in-network provider no less frequently than every three years, or according to applicable standards at the time. A notice that recredentialing is due will be sent to the provider approximately four months prior to the credentialing period expiration date.

Failure to return the information by the due date will result in termination from the PacificSource network and will affect claims payment. If the provider is reinstated after such termination, the provider will be required to complete the full credentialing process, as deemed necessary by NCQA and CMS.

At a minimum, the recredentialing process will include verification or review of items noted in the Initial Credentialing Process section, including quality improvement activities.

The decision process is the same for recredentialing as for initial credentialing (see Phase 3: Decision in the Initial Credentialing Process section). Providers who are approved for a recredentialing period less than three years will be notified in writing. Providers who are denied continued participation will be notified in writing via certified mail, and are awarded appeal rights. Providers are notified of these rights and the process to request an appeal at the time of credentialing termination. Appeal rights are not granted for providers that are terminated for administrative reasons, such as loss of an active license, failure to recredential, and so on.

4.1.5 Practitioner Rights

PacificSource practitioners are afforded certain rights during the credentialing and recredentialing process. These rights include but are not limited to:

- The right to review information submitted to support your credentialing application, including information received from outside sources, such as malpractice insurance carriers and state licensing boards. This right does not include the ability to review references, recommendations or other peer-review protected information.
• The right to correct erroneous information, when information submitted with your application varies substantially from information obtained during the credentialing process. The Credentialing department will notify you when such information is identified, with the appropriate timeframes and format to make necessary corrections. PacificSource is not required to reveal the source of the information verified, if federal or state law prohibits disclosure.

• The right to be informed of the status of your credentialing and recredentialing applications, upon reasonable request. The Credentialing department may provide projected timelines for completion, including possible delays, information pending or missing, and substantial variations in information verified during the credentialing process. The Credentialing department will respond within 14 days of receiving such requests, via email, telephone, fax or mail.

4.2 Locum Tenens

A Locum Tenens arrangement is made when an in-network provider must leave his or her practice temporarily due to illness, vacation, leave of absence, or any other reasons. The Locum Tenens is a temporary replacement for that provider, usually for a specified amount of time. Typically, the Locum Tenens should possess the same professional credentials, certifications, and privileges as the practitioner he or she is replacing.

Medicaid: PacificSource requires each eligible practitioner, provider or supplier of service appear as the rendering provider in box 31 of the CMS 1500 form. If an in-network provider goes on leave, we require the covering provider to be credentialed prior to being paid under the absent providers contract.

Medicare: PacificSource Medicare will accept modifier Q5/Q6 claims. The plan will monitor all claims that are submitted with these modifiers to ensure the same locum is not billing for services longer than 60 days. Providers must be fully credentialed if practicing more than 60 days.

Commercial: PacificSource will accept modifier Q5/Q6 locum tenens claims. Our Provider Network department will monitor all claims that come in with Q5 or Q6 modifier to ensure they are within the locum tenens claim guidelines.

A locum tenens provider who provides coverage for an in-network provider for up to 60 consecutive days does not require credentialing with PacificSource. If the locum tenens leaves the practice and then returns to the practice for an additional cycle, a new 60-day cycle will be allowed before credentialing is required. However, if the locum tenens provider provides coverage longer than 60 consecutive days, the applicable practitioner credentialing application is mandatory for claims consideration.

Locum tenens claims billed after the 60-day period without the completion of credentialing will be denied. Claims would need to include the names of the locum tenens or the servicing provider for the claim to pay according to member’s benefits and contractual guidelines. Be sure to include the provider’s NPI in item 24-K on the CMS-1500 claim form or electronic equivalent.

4.3 Taxpayer Identification Numbers

If you have a change in your tax identification number, you are required to notify us immediately. To ensure accurate IRS reporting, the W9 submitted to PacificSource must match the information submitted to the IRS.

When you notify us of a change to your tax identification number (TIN), please follow these steps:

• If you need a current version of the IRS W9 form, you may download it from the IRS website at irs.gov/forms-pubs/about-form-w-9.
• Complete and sign the W9 form, following instructions exactly as outlined on the form.

• Include the effective date.

• On a separate sheet of paper, tell us the date you want the new number to become effective (when PacificSource should begin using the new number).

• Send the completed form with the effective date by fax: (541) 225-3644, or mail:
  Attn: Provider Network Department PacificSource Health Plans
  PO Box 7068
  Springfield OR 97475

For your current provider identification numbers, please contact our Provider Network department by phone at (541) 684-5580 or toll-free at (800) 624-6052 ext. 2580, or by email at providernet@pacificsource.com.

### 4.4 Physician and Provider Contract Provisions

PacificSource physician and provider contract provisions vary regarding lines of business, referrals, medical management, method of payment, and withhold requirements, but several provisions remain the same. The provisions that remain constant:

- Physicians and providers will accept the lesser of the billed amount or PacificSource negotiated rates in effect at the time the service or supplies were rendered or provided as payment in full, less deductibles, coinsurance, copayments, and/or services that are not covered.

- Physicians and providers will not attempt to collect from members any amounts in excess of the negotiated rates.

- Physicians and providers may not collect up-front, except for deductibles, coinsurance, copays and/or services that are not covered. (See section Availability Practice, Patient Waivers for more detailed information)

- Physicians and providers will bill their usual and customary charges.

- Practitioners and facilities cooperate with quality improvement activities to improve the quality of care and services and members experience. Cooperation includes collection and evaluation of data and participation in PacificSource’s Quality Improvement programs. PacificSource may use practitioner and facility performance data for quality improvement activities.

- Provider will not provide incentives to deny, limit, or discontinue medically necessary services to enrollees.

- Physicians and providers will bill PacificSource directly using current CPT procedure, ICD10 diagnostic, HCPCS and/or DRG coding, and not ask members to bill PacificSource for their services.

- Physicians and providers will cooperate with PacificSource, to the extent permitted by law, in maintaining medical information with the express written consent of the insured, and in providing medical information requested by PacificSource when necessary to coordinate benefits, quality assurance, utilization review, third party claims, and benefit administrations. PacificSource agrees that such records shall remain confidential unless such records may be legally released or disclosed. For specific contract provisions, please refer to your direct contract or to the negotiating entity that contracted on your behalf. You are also welcome to contact our Provider Network department by phone at (541) 684-5580 or (800) 624-6052 ext. 2580, or by email at providernet@pacificsource.com.

For specific contract provisions, please refer to your direct contract or to the negotiating entity that contracted on your behalf. You are also welcome to contact our Provider Network department by phone at (541) 684-5580 or toll-free at (800) 624-6052, ext. 2580, or by email at providernet@pacificsource.com. For dental contracts, please refer to your dental care organization.

Confidentiality of Records
As required under state and federal law and regulation, providers agree that information from medical records of members and information received by PacificSource Community Solutions pertaining to the provider-patient relationship is confidential and will only be shared as necessary under the Provider Agreement to assure appropriate administration of PacificSource Community Solutions or dental care organization, peer review, quality assurance, and to improve the availability and coordination of covered services to members. Providers agree to adhere to and follow all applicable state and federal privacy standards, including, but not limited to, the requirements under the Health Insurance Portability and Accountability Act of 1996, Public Law 104-191 and regulations enacted by the Department of Health and Human Services at 45 CFR Parts 142, 160-164.

Record Retention, Data, and Medical Record
Providers and their subcontractors shall maintain financial, medical and other records in accordance with prevailing standards for members to whom a provider provides services pursuant to the terms and conditions of the Provider Agreement.

- Medical Records: Medical records, including deceased patients’ (adults and minors), shall be kept for a minimum of 10 years from the patient’s last contact with their provider or per state or federal law, whichever is greater.
- Accounting Records: Accounting records pertinent to the Provider Agreement shall be maintained pursuant to applicable accounting principles for 10 years, or per state or federal law, whichever is greater.

Review of Books, Records, and Papers
Providers shall comply with all reasonable requests by PacificSource Community Solutions or its designee for access to member patient records reasonably necessary for the performance of provider, dental care organization, or PacificSource Community Solutions duties under the Provider Agreement.

Providers acknowledge that, subject to all applicable federal and state statutory and regulatory limitations, PacificSource Community Solutions shall have access at reasonable times upon reasonable demand to the books, records, and papers of providers relating to healthcare services provided to members. Such access shall include, but is not limited to, allowing review by the PacificSource Community Solutions Medical Director and/or his or her designee of a random selection of providers’ office charts relating to members for purposes of PacificSource Community Solutions peer review, utilization review, and quality assurance programs.

Provider Communication
Each contracted provider has access to the Provider Manual. Enrollee rights and the provider’s responsibilities to comply with these rights are outlined in the Provider Manual. You can access the most current Provider Manual on our website at CommunitySolutions.PacificSource.com.

Dental providers: Please refer to the manual provided by your dental care organization.

Provider Monitoring and Corrective Action
Providers will be monitored to ensure they are complying with the Enrollee Rights. Monitoring will occur through the Grievance and Appeals process. Any complaint received that is regarding a possible violation
of an enrollee’s rights will be logged and tracked as an enrollee rights complaint. These complaints will be reviewed by the Clinical Quality Utilization Management (CQUM) Committee and Pharmacy & Therapeutics Committee on a quarterly basis. If a provider is found to have violated an enrollee’s rights, the CQUM Committee will determine appropriate corrective action.

### Training Requirements

Providers, provider staff, and subcontractors are required to participate in annual training in each of the fundamental areas listed below. Providers shall attest to the provision of this training by reporting the training subject, content outline and materials, assessment of goals and objectives, target audiences, delivery system, evaluations, training dates and hours, training attendance, and trainer qualifications for each training offered. If a provider does not have the capacity to offer training to staff and subcontractors they shall participate in training offered by PacificSource.

Fundamental areas of training include, but are not limited to:

- Cultural Responsiveness
- Implicit Bias
- Language access (including use of plain language and healthcare language interpreters)
- Use of CLAS Standards in the provision of services
- Adverse Childhood Experiences/trauma informed practices that are culturally responsive
- Uses of REAL+D data to advance health equity;
- Universal access and accessibility in addition to compliance with ADA
- Foundations of Trauma Informed Care
- Healthcare integration
- Recovery principles
- Motivational Interviewing

#### 4.4.2 PacificSource Medicare Physician and Provider Contract Provisions

### Privacy and Accuracy Records

Provider agrees to abide by all federal and state laws regarding confidentiality and disclosure of medical records or other health and enrollment information, safeguard the privacy of the member’s information, and maintain records and information in an accurate and timely manner and to ensure timely access by members to the records and information that pertain to them. Medical record information will only be disclosed to contracted business associates outside of the organization in which PacificSource Medicare retains a valid confidentiality agreement with [42 CFRs 422.118 and 422.504 (a)(13)].

### Record Retention, Data, and Medical Record

PacificSource Medicare will obtain the risk adjustment data required by CMS from the provider, supplier, physician, or other practitioner that furnished the item or service. Provider will cooperate with PacificSource Medicare when applicable.

PacificSource Medicare may include in its contracts with providers, suppliers, physicians, and other practitioners, provisions that require submission of complete and accurate risk adjustment data as required by CMS. These provisions may include financial penalties for failure to submit complete data. Provider will cooperate with PacificSource Medicare when applicable.
PacificSource Medicare and its providers and practitioners will be required to submit a sample of medical records at no cost, unless otherwise specified for the validation of risk adjustment data as required by CMS. There may be penalties for submission of false data. Provider will cooperate with PacificSource Medicare when applicable.

PacificSource Medicare and provider will maintain books, records, documents, and other evidence of accounting procedures and practices for ten years for the purpose of CMS inspection and audit. PacificSource Medicare and provider will comply with state and federal government auditing, inspection, and evaluation requirements, including maintenance of record, access to facilities and records, and record retention guidelines pursuant to 42 CFR §422.504(d)(e).

PacificSource Medicare’s contracts with providers will contain CMS-required provisions pursuant to 42 CFR §422.504(i)(3), (4).

PacificSource Medicare and provider (when applicable) will certify to the accuracy, completeness, and truthfulness of relevant data to CMS pursuant to 42 CFR §422.504(l)(3).

**Medical Record Submission Guidelines:** Medical records are requested when additional information is needed to process a claim. Letters to request this information will be sent via regular mail. Please include the claim number or a copy of the letter with your submission.

Government Claims: fax: (541) 322-6437
Commercial Claims: fax: (541) 225-3634
Dental Claims: fax: (541) 246-1461

**Provider Communication**

Each contracted provider receives and has access to the PacificSource Provider Manual. Member rights and the provider’s responsibilities to comply with these rights are outlined in this document.

The Provider Network department also communicates these rights to providers through provider meetings.

**Provider Incentive Plans**

PacificSource Medicare does utilize physician incentive plans. A physician incentive plan means any compensation arrangement to pay a physician or physician group that may directly or indirectly have the effect of reducing or limiting the services provided to any plan enrollee. PacificSource Medicare does not make specific payment, directly or indirectly, to a physician or physician group as an inducement to reduce or limit medically necessary services furnished to any particular enrollee. Indirect payments may include offerings of monetary value (such as stock options or waivers of debt) measured in the present or future.

**Provider Monitoring and Corrective Action**

Providers will be monitored to ensure they are complying with the member rights listed in chapter 9 of this manual. Monitoring will occur through the Grievance and Appeals process. Any complaint received regarding a possible violation of a member’s rights will be logged and tracked as a Member Rights complaint. These complaints will be reviewed by the Quality Medical Management (QMM) Committee on a quarterly basis. If a provider is found to have violated an member’s rights, the QMM Committee will determine appropriate corrective action.
4.4.3 Medicare Advantage Contract Addendum

PacificSource Health Plans ("PacificSource") is an Oregon nonprofit corporation and has several wholly owned subsidiaries, including one that is a Medicare Advantage Organization contracted with the Centers for Medicare and Medicaid Services ("CMS") to offer Medicare Advantage health insurance products. PacificSource and Contractor have entered into a separate, underlying agreement (the “Agreement”) whereby Contractor provides certain covered services to PacificSource members. PacificSource has entered into an agreement with one of its subsidiaries, PacificSource Community Health Plans, that is a Medicare Advantage Organization (the "MA Organization"). This Addendum is intended to apply on behalf of PacificSource and its related subsidiaries to the extent that Contractor provides services to members enrolled in a Medicare Advantage policy through a PacificSource subsidiary organization, or to the fullest extent required by CMS.

CMS requires that specific terms and conditions be incorporated into the Agreement between a Medicare Advantage Organization or First Tier Entity and a First Tier Entity or Downstream Entity to comply with the Medicare laws, regulations, and CMS instructions, including, but not limited to, the Medicare Prescription Drug, Improvement and Modernization Act of 2003, Pub. L. No. 108-173, 117 Stat. 2066 ("MMA").

Except as provided herein, all other provisions of the Agreement between PacificSource and Contractor not inconsistent herein shall remain in full force and effect. This amendment shall supersede and replace any inconsistent provisions to such Agreement; to ensure compliance with required CMS provisions, and shall continue concurrently with the term of such Agreement.

NOW, THEREFORE, the PacificSource and Contractor agree as follows:

Definitions

Centers for Medicare and Medicaid Services ("CMS"): The agency within the Department of Health and Human Services that administers the Medicare program.

Clean Claim: (1) A claim that has no defect, impropriety, lack of any required substantiating documentation (consistent with § 422.310(d)) or particular circumstance requiring special treatment that prevents timely payment; and (2) A claim that otherwise conforms to the clean claim requirements for equivalent claims under original Medicare.

Unclean Claim: A claim that is not a clean claim.

Completion of Audit: Completion of audit by the Department of Health and Human Services, the Government Accountability Office, or their designees of a Medicare Advantage Organization, Medicare Advantage Organization contractor or related entity.

Contractor: Completion of audit by the Department of Health and Human Services, the Government Accountability Office, or their designees of a Medicare Advantage Organization, Medicare Advantage Organization contractor or related entity.

Downstream Entity: Any party that enters into a written arrangement, acceptable to CMS, with persons or entities involved with the MA benefit, below the level of the arrangement between an MA organization (or applicant) and a first tier entity. These written arrangements continue down to the level of the ultimate provider of both health and administrative services.

Final Contract Period: The final term of the contract between CMS and the Medicare Advantage Organization.
First Tier Entity: Any party that enters into a written arrangement, acceptable to CMS, with PacificSource or applicant to provide administrative services or healthcare services for a Medicare eligible individual under the MA Organization program.

Medicare Advantage (“MA”): An alternative to the traditional Medicare program in which private health insurance companies provide healthcare benefits that those eligible beneficiaries would otherwise receive directly from the Medicare program.

Medicare Advantage Organization (“MA Organization”): A public or private entity organized and licensed by a State as a risk-bearing entity (with the exception of provider-sponsored organizations receiving waivers) that is certified by CMS as meeting the MA contract requirements. For purposes of this Addendum, the MA Organization is PacificSource Community Health Plans.

Member or Enrollee: A Medicare Advantage eligible individual who has enrolled in or elected coverage through a Medicare Advantage Organization.

Provider: (1) Any individual who is engaged in the delivery of healthcare services in a State and is licensed or certified by the State to engage in that activity in the State; and (2) any entity that is engaged in the delivery of healthcare services in a State and is licensed or certified to deliver those services if such licensing or certification is required by State law or regulation.

Related Entity: Any entity that is related to the PacificSource by common ownership or control and (1) performs some of the PacificSource’s management functions under contract or delegation; (2) furnishes services to Medicare enrollees under an oral or written agreement; or (3) leases real property or sells materials to the PacificSource at a cost of more than $2,500 during a contract period.

Required Provisions for Contractor
Contractor agrees to the following:

1. HHS, the Comptroller General, or their designees have the right to audit, evaluate, and inspect any pertinent information for any particular contract period, including, but not limited to, any books, contracts, computer or other electronic systems (including medical records and documentation) of the first tier, downstream, and entities related to CMS’ contract with the MA Organization through 10 years from the final date of the final contract period of the contract entered into between CMS and the MA Organization or from the date of completion of any audit, whichever is later. 42 C.F.R. §§ 422.504(i)(2)(i) and (ii).

2. Contractor will comply with the confidentiality and enrollee record accuracy requirements, including: (1) abiding by all Federal and State laws regarding confidentiality and disclosure of medical records, or other health and enrollment information, (2) ensuring that medical information is released only in accordance with applicable Federal or State law, or pursuant to court orders or subpoenas, (3) maintaining the records and information in an accurate and timely manner, and (4) ensuring timely access by enrollees to the records and information that pertain to them. 42 C.F.R. §§ 422.504(a)(13) and 422.118.

3. Contractor agrees to not hold enrollees liable for payment of any fees that are the legal obligation of the MA Organization. 42 C.F.R. §§ 422.504(i)(3)(i) and 422.504(g)(1)(i).

4. For all enrollees eligible for both Medicare and Medicaid, enrollees will not be held liable for Medicare Part A and B cost sharing when the State is responsible for paying such amounts. Contractor will be informed of Medicare and Medicaid benefits and rules for enrollees eligible for Medicare and Medicaid. Contractor may not impose cost-sharing that exceeds the amount of cost-sharing that would be permitted with respect to the individual under title XIX if the individual were not enrolled in such a plan. Contractor will: (1) accept the MA Organization’s payment as payment
in full, or (2) bill the appropriate State source. 42 C.F.R. §§ 422.504(i)(3)(i) and 422.504(g)(1)(i). This paragraph does not apply to Contractor who is not a Provider.

5. Any services or other activity performed in accordance with a contract or written agreement by Contractor are consistent and comply with the MA Organization’s contractual obligations. 42 C.F.R. § 422.504(i)(3)(iii).

6. The MA Organization is obligated to pay or deny Contractor in accordance to the prompt payment provision for clean claims and unclean claims as contained in the provider agreement. 42 C.F.R. §§ 422.520(b)(1) and (2). This paragraph does not apply to Contractor who is not a Provider.

7. To the extent that any payment(s) for Covered Services under the terms of this Agreement are based, either in whole or in part, on funds obtained from any state or federal program, of any nature, those payments are subject to modification as a result of any change in state or federal law, rule, regulation, or Executive Order.

8. Contractor and any related entity, contractor or subcontractor will comply with all applicable Medicare laws, regulations, and CMS instructions. 42 C.F.R. §§ 422.504(i)(4)(v).

9. As applicable, if the MA Organization’s activities or responsibilities under its contract with CMS are delegated to any first tier, downstream and related entity:

(i) The MA Organization and Contractor acknowledge that delegated activities are clearly outlined in the Agreement, or a companion agreement specifying specific services that are delegated and the reporting responsibilities.

(ii) CMS and the PacificSource reserve the right to revoke the delegation activities and reporting requirements or to specify other remedies in instances where CMS or the PacificSource determines that such parties have not performed satisfactorily.

(iii) The MA Organization will monitor the performance of the parties on an ongoing basis.

(iv) The credentials of medical professionals affiliated with the party or parties will be either reviewed by PacificSource or the credentialing process will be reviewed and approved by PacificSource and PacificSource must audit the credentialing process on an ongoing basis. This paragraph does not apply to Contractor who is not a Provider.

(v) If PacificSource delegates the selection of providers, contractors, or subcontractor, PacificSource retains the right to approve, suspend, or terminate any such arrangement. 42 C.F.R. §§ 422.504(i)(4) and (5).

10. Contractor must comply with Health Plan’s policies and procedures.

11. Health Plan may only delegate activities or functions to Contractor in a manner consistent with CMS requirements.

12. Health Plan and Contractor shall comply with the termination provision contained in the contract, which at a minimum must require both parties to provide a minimum of 60 days written notice to each other before terminating the contract without cause. This paragraph is not applicable if termination without cause is prohibited by the contract.

13. PacificSource advocates for open lines of communication and requires Contractor to contact its contract administrator regarding any compliance issues or suspected compliance issues. PacificSource also maintains an anonymous reporting vehicle, which is accessed at: EthicsPoint.com, or toll-free (888) 265-4068.

In the event of a conflict between the terms and conditions above and the terms of the underlying Agreement, these terms shall control.
4.4.4 Medical Records and Chart Notes Requirements

The purpose of practitioner signatures is to indicate that the services have been accurately and fully documented, reviewed and authenticated. The individual who ordered and/or provided services must be clearly identified in the medical records to confirm that the provider acknowledges the medical necessity and reasonableness of the service(s) that were rendered.

All medical records, chart notes, procedures and orders submitted for review must be **signed** and **dated** by the rendering practitioner.

- A medical record that does not contain a valid signature may result in claim denials or recovery of overpayments.
- Signatures added to documentation following a claim denial will not be accepted.

This is modeled after requirements in the Centers for Medicare and Medicaid Services (CMS) Medicare Program Integrity Manual (MPIM). Specifically, Section of the MPIM states:

“For medical review purposes, Medicare requires that services provided/ordered be authenticated by the author. The method used shall be a handwritten or an electronic signature. Stamp signatures are not acceptable.”

According to the CMS manual, records should be signed prior to being billed. Section 3.3.2.4 of the MPIM also states:

“Providers should not add late signatures to the medical record (beyond the short delay that occurs during the transcription process) but instead may make use of the signature authentication process.”

While CMS requirements do not govern commercial health plans, PacificSource has made the business decision to adopt the CMS signature requirements across all of its lines of business. This standard is recognized as a best practice by professional associations such as the American Health Information Management Association (AHIMA) and the American Academy of Family Physicians (AAFP).

**Handwritten Signatures Must:**

- Appear on each entry (multiple page medical records require one signature at the end of the last page as long as it is clearly documented to be one encounter)
- Be legible
- Include the practitioner’s first initial and last name, at minimum
- Requires the practitioner’s credentials (PA, DO, MD, etc.)
- PacificSource may request a signature log with any review of medical records to verify provider’s signature or initials.

**Digitized/Electronic Signatures:**

- The responsibility for, and authorship of, the digitized or electronic signature should be clearly defined in the record.
- A “digitized signature” is an electronic image of an individual’s handwritten signature. It is typically generated by encrypted software that allows for sole usage by the practitioner.
- An electronic or digitized signature requires a minimum of a date stamp (preferably includes both date and time notation) along with a printed statement such as, “Electronically signed by,” or “Verified/reviewed by,” followed by the practitioner’s name and a professional designation. An example would be: Electronically signed by: John Doe, MD 03/31/2016 08:42 am.
Unacceptable Signatures

- Signature “stamps”
- Missing signature on dictated and/or transcribed documentation
- “Signed but not read” notations
- Illegible lines or marks

Elements of a complete medical record

Per CMS Documentation Guidelines, elements of a complete medical record may include:

- Physician orders and/or certifications of medical necessity
- Patient questionnaires associated with physician services
- Progress notes of another provider that are referenced in your own note
- Treatment logs
- Related professional consultation reports
- Procedure, lab, x-ray and diagnostic reports
- Signature and date

Attestations

Applies to Idaho, Montana, and Oregon.

PacificSource will permit the use of an attestation form when a signature or date is illegible or missing due to an inadvertent omission. The attestation is used to identify the provider of service and authenticate that medical record information is accurate and complete.

Limitations of Attestation

Although the attestation will be accepted regardless of the date it was created, it should not be utilized to “backdate” services relating to orders, plan of care, date records after medical records have been requested, etc.

PacificSource may report a provider for potential fraud if a provider is frequently/regularly using the attestation process rather than to correct the occasional inadvertently missing signature. Patterns or consistent use of attestation in place of signed records may lead to further investigation of claims data, denial of claims, audits, or overpayment recovery. This is consistent with the fraud referrals information from CMS Pub 100-08, Medicare Program Integrity.

We consider the utilization frequency of the attestation process to be acceptable once every 6 months. The submission of the attestation is not in itself a guarantee the claim will be processed if other deficiencies were identified in the medical records.

Attestation Statement

In order to be considered valid for PacificSource documentation review purposes, an attestation statement must:

- Be signed and dated by the author of the medical record entry. Attestation statements will not be accepted if signed by someone other than the author of the medical record.
- Clearly identify the PacificSource member receiving treatment or services and the date services were rendered.
PacificSource neither requires nor instructs providers to use a certain form or format. They may choose to use the following statement or draft:

“I, [print full name of the physician/practitioner], hereby attest that the medical record entry for [date of service] accurately reflects signatures/notations that I made in my capacity as [insert provider credentials, e.g., M.D.] when I treated/diagnosed the above listed PacificSource member. I do hereby attest that this information is true, accurate and complete to the best of my knowledge and I understand that any falsification, omission, or concealment of material fact may subject me to administrative, civil, or criminal liability.”

Additional Requirements

The attestation statement should be submitted, within 20 calendar days of audit review, with:

- PacificSource Corrected Claim Form
- Copy of medical records, even if records have previously been submitted
- Explanation of why the signature was omitted from original medical record

Failure to submit the appropriate documentation within 20 calendar days will result in denial of affected claims.

PacificSource shall not consider attestation statements where there is no associated medical record or medical record where the original content has been altered.

Amended Medical Records

Late entries, addendums, or corrections to a medical record are legitimate occurrences in documentation of clinical services. A late entry, an addendum or a correction to the medical record, bears the current date of that entry and is signed by the person making the addition or change.

- Late Entry: A late entry supplies additional information that was omitted from the original entry. The late entry bears the current date, is added as soon as possible, is written only if the person documenting has total recall of the omitted information and signs or initials the late entry.
- Addendum: An addendum is used to provide information that was not available at the time of the original entry. The addendum should also be timely and bear the current date and reason for the addition or clarification of information being added to the medical record and be signed or initialed by the person making the addendum.
- Correction: When making a correction to the medical record, never write over, or otherwise obliterate the passage when an entry to a medical record is made in error. Draw a single line through the erroneous information, keeping the original entry legible. Sign and date the deletion, stating the reason for correction above or in the margin. Document the correct information on the next line or space with the current date and time, making reference back to the original entry.
- Correction of electronic records should follow the same principles of tracking both the original entry and the correction with the current date, time, reason for the change and initials of person making the correction. When a hard copy is generated from an electronic record, both records must be corrected. Any corrected record submitted must make clear the specific change made, the date of the change, and the identity of the person making that entry.

4.5 Call Share Policy

In-network providers agree to make arrangements for coverage when they are unavailable. The call share physician or provider may bill PacificSource for the services provided to the patient, and PacificSource
will reimburse the call share provider for noncapitated services. Dental providers can refer to the manual provided by your DCO.

If electronic answering machines are used, messages should include the following:

- Name and telephone number of the on-call provider
- Instructions on how to contact that provider

IMPORTANT NOTE: A tape-recorded telephone message instructing members to call a hospital emergency room is not sufficient for 24-hour coverage.

PacificSource maintains call share group listings. Any changes in call share must be forwarded to the Provider Network department. If there is any change in a call share group, please call Provider Network as soon as possible at (541) 684-5580 or (800) 624-6052, ext. 2580.

4.6 **Accessibility**

PacificSource has established timeliness access standards of care related to primary care, emergent/urgent care, and behavioral health care.

**For Commercial and Medicare members, the following access standards apply.**

4.6.1 **Behavioral Health Services**

Behavioral health providers will accept behavioral health appointments for:

- Routine office visit for behavioral health services within 10 working days
- New patient visit for behavioral health services within 10 working days
- Urgent care services within 48 hours*
  - Nonlife-threatening emergency care, contact within six hours*
  - Life-threatening emergency care immediately*

*PacificSource members have direct access to behavioral health services by calling your office or going to the emergency room.

4.6.2 **Primary Care Provider Services**

Primary care providers will accept office appointments for:

- Preventive care services (such as annual physicals, immunizations, and annual gynecologic exams) within four weeks in Oregon, Idaho, Montana, and Washington
- Routine services (such as colds, rashes, headaches, and joint/muscle pain) within five working days
- Urgent services (high fever, vomiting, etc.) within 48 hours
- Emergency care services the same day
- After hours care should include 24 hour phone availability (answering machine or service advising patients of care options)
4.6.3 Specialty Care Providers

Specialty care providers will accept appointments for:

- Urgent services within 48 hours
- Follow-up visit from emergency room visit within two weeks
- Routine follow-up within four weeks

After hours care should include 24-hour phone availability (answering machine or service advising patients of care options).

4.6.4 Access to Care Standards

PacificSource Community Solutions has established timeliness of access standards of care related to primary care, emergent/urgent care, and behavioral healthcare.

Note: the following access standards are specific to availability for Medicaid members pursuant to OAR 410-141-3220.

**Physical Health Services:**

Physical health services include primary care services and specialty care unless otherwise specified.

- Wellcare appointments—Within four weeks, or as otherwise required by applicable care coordination rules, including OAR 410-141-3860 through 410-141-3870 (annual physicals, pediatric/adult immunization, and annual GYN exams)
- Urgent primary-care appointments—Within 72 hours or as indicated in initial screening, in accordance with OAR 410-141-3840 (high fever, vomiting etc.)
- Emergency care services—Immediately or referred to an emergency department depending on the member’s condition
- After-hours care—24-hour phone available (call share or answering machine/service advising members of care options; see Call Share Policy section for more about call sharing)

**Behavioral Healthcare Services:**

- Urgent/emergent care for all populations—Immediately
- Routine behavioral healthcare for nonpriority populations—Assessment within 7 days of the request, with a second appointment occurring as clinically appropriate
- Specialty behavioral healthcare for priority populations—Pursuant to OAR 309-019-1015 and 410-141-3515. If timeframe cannot be met due to lack of capacity, the member must be placed on a waitlist and provided interim services within 72 hours of being placed on waitlist. Interim services must be comparable to the original services requested based on the level of care, per OAR.
- New-patient appointment—10 days

*All PacificSource Community Solutions members have direct access to behavioral health services by calling their provider’s office or going to the emergency room.

**Primary Care Dental Services:**

- Routine oral care—Within 8 weeks, unless there is a documented special clinical reason that makes a period longer than 8 weeks appropriate
• Dental care for pregnant members—Services provided pursuant to OAR 410-123-1510 within an average of 2 weeks, unless there is a documented special clinical reason that makes longer than 2 weeks appropriate
• Urgent oral care—Within one week or as indicated in the initial screening in accordance with OAR 410-123-1060
• Emergency oral care—Seen or treated with 24 hours

If a provider must cancel an appointment, the provider must make a good-faith effort to contact the member and reschedule for a later time.

PCPs are encouraged to contact specialty providers directly for urgent patient needs. If a member has an urgent or emergent need and the listed primary care provider is unavailable, alternative treatment access should be made available for the member.

Practitioners are encouraged to maintain several open, same-day appointments for any urgent/same day needs.

Provider Network will measure compliance with the above standards by conducting monthly access surveys, site visit checklists, and member complaints. All measured data is analyzed and reviewed by the QI Committee. If there are more than three member complaints about a specific office or provider, then a review will be required and completed by the Provider Network department. Results of any review will possibly identify opportunities for improvement, and corrective actions if necessary.

4.7 Providers

4.7.1 Primary Care Providers

When a provider is practicing within a Patient-Centered Primary Care Home and/or chooses to be designated as a primary care practitioner (PCP) under a benefit plan requiring a PCP, they agree to provide and coordinate healthcare services for PacificSource members. PCPs shall refer members to panel specialists for services the PCP is unable to provide. The PCP will also be responsible for reviewing the treatment rendered by the specialist.

The primary care practitioner is also responsible for the following:

• Accepts new patients when practice is open to other insurance carriers
• Will notify PacificSource in writing when practice is closed to new patients
• Will arrange for call sharing with a panel physician or provider 24 hours a day, seven days a week
• Will notify PacificSource of any changes in call share coverage
• Will notify PacificSource when asking a member to seek treatment elsewhere

Please see the Referrals section for complete referral requirements.

When a provider is practicing within a Patient-Centered Primary Care Home and/or chooses to be designated (Client note: We need the rest of this sentence.)

4.7.2 Responsibilities

When a provider chooses to be designated as a primary care provider (PCP), they agree to provide and coordinate healthcare services for PacificSource members. PCPs shall refer members to network specialists for services the PCP is unable to provide. The PCP will also be responsible for reviewing the treatment rendered by the specialist.
The primary care provider’s responsibility as the manager and coordinator of the member’s care is as follows:

- **The PCP provides all primary preventive healthcare services, except the annual gynecological exam should the member choose to seek this service from an in-network women’s healthcare specialist.**

- **Medicaid:** The PCP will complete a culturally and linguistically appropriate health risk assessment (HRA) on all members. This includes screening for chronic disease and risk factors such as alcohol, tobacco use, other substance use, high blood pressure, diabetes, depression, breast, colorectal and cervical cancer, high cholesterol, stress, trauma and other mental health issues with opportunities for education, treatment and follow-up based on results.

- When specialized care is medically necessary, the PCP will facilitate a referral to a specialist or specialty facility.

- **Medicaid:** The PCP must contact PacificSource Community Solutions to obtain preapproval or a referral to specialty providers, if necessary.

- The PCP will coordinate care and share appropriate medical information with PacificSource and any specialty provider to whom they refer their patients.

- **Medicaid and Medicare:** The PCP may delegate care coordination to another provider if both the member and the other provider agree. This will be clearly documented in the PCP’s clinical record.

- **Medicaid:** PacificSource covers second opinions. If a member wants a second opinion about their treatment options, they will consult with their PCP about a referral for another opinion. Their PCP will need to contact PacificSource Community Solutions to get approval of the referral (preapproval). If a member wants to see a noncontracted provider; the member or their PCP will need to get PacificSource approval first. Second opinions for dental services are covered. Dental providers should coordinate with their dental care organization to arrange second opinion visits.

- The PCP will retain the original completed Advance Directive and Declaration of Mental Health Treatment forms and provide a copy to the member. They will also document in a prominent place in their patient’s records if an individual has executed an Advance Directive and/or a Declaration of Mental Health Treatment.

- Will notify PacificSource in writing when practice is closed to new patients.

- Will arrange for call sharing with a network physician or provider 24 hours a day, seven days a week.

- Will notify PacificSource of any changes in call share coverage.

- Will notify PacificSource when asking a member to seek treatment elsewhere.

- Provider or provider groups will notify their assigned Provider Service Representative of any PCP changes that will be occurring. All changes need to be submitted in writing, prior to the effective date of said change. If not received prior, then it needs to be received within 30 days of the effective date change. Delayed notices received outside of the date requirements can have an impact on providers or provider groups with Capitated agreements. Provider or provider groups will need to work with their assigned Provider Service Representative. Delayed notice case will require Provider Network leadership to review for approval. Delayed case determinations will be communicated by the assigned Provider Service Representative in writing. Providers with multiple delayed cases are subject to corrective action.

- For PCP changes specific to Legacy IDS members, providers considered to be out of network with Legacy IDS requests will need to be made through HealthShare.

Also see section on Referrals.
Medicare: Continuity of Care and Monitoring

Referral providers are responsible to ensure that relevant medical, mental health, and/or dental information is sent to the referring primary care provider (including telephone referrals). The referral needs to be documented in the member’s clinical record by both the referral provider and referring provider. The PCP is responsible to document denial or acceptance of the referral in the PCP’s clinical record for the member.

- The referring provider (PCP) is responsible for reviewing the information sent by the referral provider, and for entering that information into the member’s clinical record.
- If a PacificSource Medicare member is seen in an emergency room, the hospital is responsible for sending those ED records to the PCP. The PCP is responsible for ensuring all emergency visit records are entered into the PacificSource Medicare member’s PCP’s clinical record.
- If a PacificSource Medicare member is hospitalized in an inpatient or outpatient setting for a covered service, the hospital is responsible for immediately notifying the PCP with the reason, date, and expected duration of the hospitalization and discharge date. The PCP is responsible for documenting this information in the PCP’s clinical record for the PacificSource Medicare member. This will include follow up plans, including appointments for provider visits. The hospital is responsible for sending the PCP pertinent reports from the hospitalization. The PCP is responsible for making sure this information is entered into the PCP’s clinical record for the PacificSource Medicare member.
- PacificSource Medicare will monitor provider records of our members to ensure information from emergency department visits, hospitalizations, and referral appointments are documented in the member’s medical record and reviewed by the referring provider.

The PCP makes a change, forcing the member to possibly change PCPs. Primary care practitioners may change members for a variety of reasons including, but not limited to, the following:

Change of Information

Please notify Provider Network if any of the following changes occur within your practice:

- Moving practice to a different location
- Moving out of the PacificSource service area
- Closing practice
- No longer participating on the panel/network
- PCP dismisses member from care
- Phone number
- Tax ID number
- Billing address
- Physical office address
- Provider leaving
- MAP, UPIN, or NPI number changes

Submit these changes in writing to:
PacificSource Health Plans
Attn: Provider Network
PO Box 7068
Springfield, OR 97475-0068

Fax: (541) 225-3643
Email: providernet@pacificsource.com
**Outstanding Referrals**

The following PacificSource policies apply regarding changes in PCPs with regard to outstanding referrals:

- When a member chooses to change PCPs, all outstanding referrals become void effective on the termination date of the referring PCP. A letter will be generated informing the member, new PCP, and specialist of any outstanding referrals.

- When a PCP makes a change forcing a member to choose a new PCP, a 60-day grace period will be in effect for all outstanding referrals. A letter will be generated informing the member, new PCP, and specialist detailing the status of any outstanding referrals.

- PCPs must contact the Provider Network department as soon as possible when making any of the above changes. Please call (541) 684-5580 or toll-free (800) 624-6052, ext. 2580.

**Limiting or Closing Practice**

PacificSource will make every attempt to communicate to our members any closed or limited practice when notified by the PCP in writing of his/her intentions. Notations regarding closed or limited practices can be found in the provider directories.

Possible notations include:

- Closed as PCP, Open as Specialist
- Practice Has Age Limitations
- Practice Has Demographic Limitations
- Accepting New Patients
- Not accepting new patients
- Accepting OB Patients only

PacificSource enrollment forms ask the insured to indicate whether or not they are an established patient of a physician or provider. Upon enrollment with PacificSource, a Membership Services Representative monitors this information and is prepared to notify the insured when they have selected a PCP whose practice is closed to new patients. In such instances, the insured will be notified by mail and asked to select a new PCP.

Primary care practitioners are sent a monthly report that lists all patients who have chosen them as their PCP. If new patients have chosen their limited or closed practice, the physician or provider can notify the PacificSource Customer Service department and request the patient appoint a different PCP. The insured will be notified by mail and asked to select a different PCP.

Questions regarding PCP selection should be referred to the Customer Service department at (541) 684-5582 or (888) 977-9299. Provider Network Management will handle questions regarding closed/limited practices.

**Applicability of State and Federal Laws**

As a federal contractor, PacificSource Community Solutions and PacificSource Medicare receive federal funds to provide services to our members. As an in-network provider providing services to PacificSource Community Solutions or Medicare members, you are subject to laws applicable to individuals and entities receiving state funds. In-network providers who treat our members are required to comply with applicable state and federal laws and regulations regarding Medicaid or Medicare.
4.7.3 Medicaid and Medicare: Availability Practice

In-network providers agree to accept new patients unless their practice has closed to new patients. Please notify PacificSource in writing when your practice is closed to new patients, and again if the practice reopens.

Providers must ensure that their hours of operation are convenient to the population served under PacificSource and do not discriminate against Medicaid or Medicare members.

In-network providers agree to provide 24-hour, seven-days-a-week coverage for Medicaid or Medicare members in a culturally competent manner and in a manner consistent with professionally recognized standards of healthcare. The provider or his/her designated covering provider will be available on a 24-hour basis to provide care personally or to direct members to the setting most appropriate for treatment.

PacificSource will make every attempt to communicate to our members any closed or limited practice when notified by the PCP in writing of his/her intentions. Notations regarding closed or limited practices can be found in the provider directories. Possible notations include:

- Closed as PCP, Open as Specialist
- Practice Has Age Limitations
- Practice Has Demographic Limitations
- Accepting New Patients
- Not Accepting New Patients
- Accepting OB Patients only

Questions regarding PCP selection should be referred to the Customer Service department at:

- PacificSource Community Solutions: (541) 382-5920 or (800) 431-4135
- PacificSource Medicare: (541) 385-5315 or toll-free (888) 863-3637

Provider Network will handle questions regarding closed/limited practices.

Provider Reporting of Quality of Care Concerns

Providers are encouraged to report quality of care issues or concerns.

**Medicaid:** You may call PacificSource Community Solutions and ask for the PacificSource Community Solutions Medical Director at (541) 330-7301. If you prefer to write a letter, please mail it to the following address:

PacificSource Community Solutions
Attention: Quality Assurance Coordinator
PO Box 7469
Bend, OR 97708

**Medicare:** You may call PacificSource Medicare and ask for the PacificSource Medicare Clinical Quality department at toll-free (888) 863-3637.

If you prefer to write a letter, please mail it to the following address:

PacificSource Medicare
Attention: Clinical Quality Department
PO Box 7469
Bend, OR 97708
Medicare: Continuity of Care Standards

PacificSource Medicare and provider will ensure continuity of care and integration of services through provider medical record review with contracted providers.

Provider Medicare Record Reviews (PMRR) are conducted annually on Medicare providers who are PCPs (general medicine, family medicine, internal medicine who act as PCPs, and pediatrics). Reviews are scheduled the year prior to the provider’s recredentialing. One of the elements of the review is the member chart. It must contain evidence of continuity and coordination of care. This can include follow through from one appointment to another and review or discussion of consult notes or recommendations. The goal of the review is to verify that provider documentation in the member medical record is in accordance with professional standards and CMS regulatory requirements.

Medicare: Marketing

Provider will not distribute any marketing materials to Medicare members unless such materials have been approved by PacificSource Medicare. The provider will comply with all aspects of the CMS marketing requirements, including prohibition on marketing activities.

Medicaid: Disclosure by Providers Related to Business Transactions

Providers agree to furnish to PacificSource or the OHA full and complete information related to the ownership of any subcontractor with whom the provider has had business transactions totaling more than $25,000 in the previous year and any significant business transactions between the provider and any wholly owned supplier or subcontractor during the previous five (5) years. Such information must be disclosed within 35 days of the request. Providers agree to also disclose information related to vendor relations, gifts, gratuities, and other compensations.

Medicare and Commercial: Termination of Patient Care

Providers may withdraw from the care of a patient when, in the medical judgment of the provider, it is in the best interest of the patient to do so. The following is a summary of the policy regarding termination of patient care.

Physician Duty

Physicians have a duty to provide medical care to a patient until the proper termination of that relationship. A patient-physician relationship can be successfully terminated by following any of the guidelines listed below:

- Mutual consent
- Patient dismissal of the physician
- The lack of need for further medical treatment
- Withdrawal of the physician

When a physician withdraws from a patient who needs continuing care at that time, the physician must take all the following steps:

- Give patient reasonable notice of intent to withdraw
- Provide the patient with a reasonable time to find alternative care
- Continue to be available during this time to treat the patient until the date indicated in the notice

Please note: The same rules apply to termination of care for nonpayment of fees.
Medicaid: Termination of Patient Care

Provider must send in a notice to PacificSource Community solutions within 30 days prior to member dismissal.

Unacceptable Primary Care Physicians Member Dismissals:

a. Because of a physical, intellectual, developmental, or mental disability;

b. Because of an adverse change in the members health;

c. Because of the member’s utilization of services, either excessive or lack thereof;

d. Because the member requests a hearing;

e. Because the member exercises their option to make decisions regarding their medical care with which the PHP disagrees;

f. Because of uncooperative or disruptive behavior resulting from the member’s special needs.

Reasonable Notice

In most cases, a 30-day notice would be considered reasonable. If the basis for termination of a PacificSource Community Solutions member from your practice is for disruptive behavior and is dangerous to other patients or staff, the period may be shortened to as little as one day. This is dependent upon the seriousness of the threat and our ability to either terminate the member from our plan or to locate another network provider willing to accept the member as his/her patient within the range of one to 30 days. This also takes into consideration both the severity of the patient’s condition and the availability of other care in the community within the time period selected. It is not necessary to indicate to the patient why the relationship is being terminated.

Please notify Customer Service at PacificSource of the termination at the same time you notify the patient.

Medicaid: Patient Waivers

There are Oregon Administrative Rules, 410-120-1280 (Billing) and 410-141-3395 (Member Protection Provisions) that outline the waiver requirements for services not covered by the OHP or CCOs. You may find these OARs online at Oregon.gov/OHA/healthplan/pages/policies.aspx. The Oregon Health Authority (OHA) and therefore PacificSource Community Solutions, require that our members receive advanced written notification that a specific service is not covered. The OHA prohibits providers from asking OHP members to sign a general waiver or sign one on a routine basis.

OHA and PacificSource Community Solutions require that the following be included in the waiver:

- The specific service being provided
- The date of the service
- A reasonable estimated cost of the service
- A statement indicating the member or member’s family is financially responsible for payment for the specific service(s)
- Services that are not supported by a diagnosis or established coding guidelines (i.e., unbundling) may be denied as provider responsibility

If you have a signed waiver on file, you must bill the service with a GA modifier. Without the use of the GA modifier, the service may be denied as provider responsibility. Under these circumstances, the member cannot be billed.
The OHA has provided a standardized waiver that you may use for these purposes, form MAP 3165. This is made available to you within our website, and at Apps.state.or.us/Forms/Served/oe3165.pdf.

**Medicaid: Voluntary Sterilization (Primary and Secondary Coverage):**

Voluntary sterilization is a covered service for PacificSource Community Solutions members. In accordance with MAP rules, PacificSource Community Solutions requires the completion of a MAP Consent to Sterilization Form (MAP 742) for all sterilizations. The provider performing the sterilization procedure is responsible for the following even if PacificSource Community Solutions is secondary:

- Obtaining a signed MAP Consent to Sterilization Form (MAP 742) from the member age 15 and over (parent or guardian for a child less than 15 years of age), at least 30 days, but not more than 180 days prior to the date of the sterilization except as outlined below.
- In the case of premature delivery by vaginal or cesarean section, the consent form must have been signed at least 72 hours before the sterilization is performed and more than 30 days before the expected date of confinement.
- In cases of emergency abdominal surgery (other than cesarean section), the consent form must have been signed at least 72 hours before the sterilization was performed.

The consent form must be signed and dated by the person obtaining the consent after the client has signed, but before the date of the sterilization. If an interpreter assists the member in completing the form, the interpreter must also sign the consent form.

When a PacificSource Community Solutions member signs a MAP Consent to Sterilization Form (MAP 742) it must be an informed choice and they must be legally competent to give informed consent. The consent is invalid if it is signed when the client is:

- In labor
- Seeking or obtaining an abortion
- Under the influence of alcohol or drugs
- Signed less than 30 days prior to procedure

The physician performing the procedure must complete the physician statement in its entirety. The physician must sign and date the consent form on the date of the procedure or on a date following the procedure.

Please submit the consent form to PacificSource Community Solutions either prior to billing or along with the claim.

**Consent to Sterilization Forms** may be obtained by contacting MAP Provider Forms Distribution, PO Box 14090, Salem, OR 97309-4090. You may also download online at Oregon.gov/oha/healthplan/Pages/forms.aspx.

Complete instructions for completing the MAP 742 form can be found in the MAP Medical Surgical Guide (OAR 410-130-0580).

**Medicaid: Hysterectomy Consent Forms**

PacificSource Community Solutions requires physicians to obtain a signed MAP Hysterectomy Consent form prior to surgery. There is no required waiting period between signing a MAP Hysterectomy consent form and surgery. Please note, hysterectomies for the sole purpose of sterilization is not covered (OAR 410-130-0580). The method for completing the consent form will vary based on the following circumstances:
When a woman is capable of bearing children:

- The physician must obtain informed consent from the member prior to the surgery being performed. The member must sign and date the consent form prior to the date of surgery.

When a woman is sterile prior to the hysterectomy:

- The physician who performs the hysterectomy must clarify in writing that the woman was already sterile prior to the hysterectomy and state the cause of the sterility.

When there is a life-threatening emergency situation, which requires a hysterectomy in which the physician determines that prior acknowledgement is not possible:

- The physician performing the hysterectomy must clarify in writing that the hysterectomy was performed under a life-threatening emergency in which he or she determined prior acknowledgment was not possible and describe the nature of the emergency.

Please submit the consent form to PacificSource Community Solutions either prior to billing or along with your claim. If submitting prior to billing, forms can be faxed to (541) 322-6437.

Complete instructions for completing the MAP 741 form can be found in the MAP Medical Surgical Guide (OAR 410-130-0760) or online at DHSForms.hr.state.or.us/Forms/Served/OE0741.pdf.

Contact your Provider Service Representative at (541) 684-5580 or (800) 624-6052, ext. 2580 for information or questions concerning the above topic.

**Advance Directive and Declaration of Mental Health Treatment**

These documents allow patients to express and control their healthcare needs at a time when they are unable to make decisions.

**Provider Responsibilities:**

- Provider will maintain written policies and procedures concerning advance directives and declaration of mental health treatment with respect to all adult individuals receiving medical or mental healthcare.
- Provider will provide written information to those individuals with respect to its written policies and respecting the implementation of those rights. It will include a clear and precise statement of limitation if the provider cannot implement an advance directive or declaration of mental health treatment as a matter of conscience.
- Providers should retain the original and provide a copy of the completed form to the member.

The forms may be obtained from Customer Service or online:


**Declaration of Mental Health Treatment:** [Oregon.gov/oha/amh/pages/services/planning.aspx](http://Oregon.gov/oha/amh/pages/services/planning.aspx)

**4.7.4 Health Insurance Portability and Accountability Act (HIPAA)**

PacificSource continues to ensure that we conduct business in a manner that safeguards member information in accordance with the privacy enacted pursuant to the Health Insurance Portability and Accountability Act (HIPAA) of 1996. The enacted privacy regulations have been fully implemented throughout this organization and we are fully committed to the protection of Personal Health Information (PHI).

PacificSource recognizes to request only the minimum necessary member information to accomplish the task at hand under the HIPAA privacy regulations. However, please note the regulation allows the
provision, transfer, and sharing of member information needed by PacificSource in the normal course of business activities to make decisions about care. To make a healthcare determination or resolve a payment issue, the member’s medical record may be requested.

Requested information may be faxed to PacificSource. PacificSource uses a fax system that is secure and only authorized personal have access to the information. Email should only be used when information is sent through an encrypted and secure email system.

The Notice of Privacy Practices that is available to all PacificSource members is available on our websites. If you have any questions or concerns, please contact your Provider Service Representative.

### 4.8 Appeals Process

PacificSource will make every effort to treat those with whom we do business fairly, honestly, and with recognition of their perspectives and needs. You can submit appeals through the provider portal, InTouch for Providers, on our websites.

#### 4.8.1 Commercial Appeals

**PacificSource Health Plans Statement of Principles**

PacificSource understands that at times our members, physicians, and providers may have questions or concerns about decisions made by our staff. Our policy is to fully and impartially document, investigate, and resolve concerns, including any issues relating to clinical care, and to notify all affected parties in a timely manner. When a contract dispute arises between a provider and PacificSource, resolution will be attempted by informal meetings and discussions in good faith between appropriate representatives of both parties. This procedure does not apply to grievances about adverse benefit determinations or claim or preclaim issues (Provider Appeals (commercial)), nor does this procedure apply for a termination of a provider contract “for cause.” All grievances and appeals will be handled and reviewed in accordance with the written policies and procedures governing PacificSource’s Grievance and Appeals Process.

PacificSource has two separate procedures for addressing and resolving grievances and appeals. However, prior to filing any grievance, we encourage all providers to call our Customer Service team or their assigned Provider Representative. We are often able to resolve any concerns or inquiries over the phone without any further action being required.

**Procedure 1: Provider Grievance**

PacificSource recognizes the right of a provider to file a grievance as it relates to adverse benefit determinations involving medical necessity or procedures or services which are considered by PacificSource to be experimental and/or investigational. Providers are entitled to a single level of review. The provider should submit a written grievance to PacificSource which identifies the member, the procedure or service at issue, and specifies the provider’s reasoning for requesting PacificSource reverse the adverse benefit determination. The provider has 180 days to initiate a first-level appeal of an adverse benefit determination. The time to appeal will start on the day the Provider receives notice of the adverse benefit determination. PacificSource will investigate and respond to the provider, in writing, within thirty (30) days of receipt of the grievance.

**Procedure 2: Member Grievance and Appeal**

PacificSource provides its members with a two-level internal grievance and appeal system. The member may designate an authorized representative (such as a provider, agent or attorney) to pursue a grievance or appeal on their behalf.
First Level of Review

The first level of review involves starts with a written grievance from the member, disputing an adverse benefit determination made by PacificSource and requesting it to be overturned. PacificSource will fully and impartially investigate the grievance, including any aspects of clinical care which may be involved, and will provide the member or the member’s authorized representative with a written determination concluding the grievance.

Second Level of Review

The second level of review involves a written appeal of the decision reached by PacificSource at the First Level of Review. When a member or authorized representative finds the earlier decision unacceptable, they have the right to appeal. To do so, the member or authorized representative must submit a written statement requesting PacificSource to review and reverse their decision. PacificSource will fully and impartially investigate the appeal, including any aspects of clinical care which may be involved, and will provide the member or the member’s authorized representative with a written determination concluding the appeal.

How to Submit Grievances or Appeals

The member or authorized representative may file a grievance or appeal by:

- Writing to PacificSource, Attn: Grievance Review, PO Box 7068, Springfield OR 97475
- Emailing a message to lc@pacificsource.com with “Grievance” as the subject
- Faxing your message to (541) 225-3628

If you are unsure how to prepare a grievance, please contact our Customer Service department by phone at (541) 684-5582 or toll-free at (888) 977-9299, or by email at cs@pacificsource.com. We will help you through the grievance process and answer any questions you may have.

PacificSource understands that at times our members, agents, physicians, and providers may have questions or concerns about decisions made by our staff. Our policy is to document, investigate, and resolve concerns, and to notify all affected parties in a timely manner. Fair consideration and timely resolution are the goals of our grievance and appeal process.

4.8.2 Medicaid Appeals

A provider appeal guide is available online at CommunitySolutions.PacificSource.com. For any questions, please contact Appeals & Grievances (A&G) at (541) 330-4992. Members have the right to a hearing if a ruling is upheld by Appeals & Grievances.

As an in-network provider, you agree to adhere to the PacificSource Community Solutions Grievance and Appeals procedures.

You have the opportunity to request that the plan reconsider a coverage action/decision that affects you adversely (e.g., claim denial) or as a patient advocate (i.e., preapproval coverage denial). This should be performed via the Provider Appeal process.

An appeal can be requested via InTouch for Providers (preferred) or by submitting a Provider Appeal Request Form. The form is located at CommunitySolutions.PacificSource.com/Providers/DocumentsAndForms. Appeals must be received by the plan within 60 calendar days of the denial date. To submit an appeal, please fax it to (541) 322-6424 or mail to:
If you fail to submit a complete and timely appeal, the plan will consider that you have accepted our coverage determination and have waived further appeal processes regarding the issue. Note that the plan may consider an exception to the filing time lines (within reasonable limits) if you can show good cause that prevented timely filing due to circumstances beyond your control. Please include this information as part of your appeal.

**Appeal Form Requirements**

All provider appeal forms must be filled in completely. They must include the following at a minimum:

- Member name/identification number
- Physician/provider name and contact
- Contact’s phone/fax number
- Claim or preapproval number being disputed
- Service denied
- Reason for the appeal (why you believe the service should be covered)
- Any pertinent clinical information or related documentation that would be of assistance in reviewing the request, to support the reasons for reversing the noncoverage decision.

These should be submitted to the Appeals & Grievances department, via fax at (541) 322-6424. Please refer to the Provider Appeal Request Form for mailing options.

**Preapproval Appeals**

PacificSource Community Solutions will accept timely preapproval appeals if you believe that additional information will impact the original decision. These types of appeals should include supporting medical information indicating why the original decision should be overturned. Appeals based on a denial of coverage as experimental/investigational should also include peer-reviewed literature supporting your position. Any appeals that do not provide additional information to support further review may not be processed.

The A&G team will make every effort to process preapproval appeals as quickly as possible. The plan will consider expediting a decision if a physician requests it, with clear indication that potentially waiting up to 30 calendar days to receive a coverage determination may place the patient’s health in jeopardy. For example, the plan may not expedite the review of a MRI coverage appeal because the procedure is scheduled to occur prior to the 30-day time frame. When the plan accepts a request to expedite a review, a coverage response will be issued within 72 hours of receipt.

When preapprovals have been denied because the plan reviewer requested documentation but did not receive it in a timely manner (such as with pharmacy requests), please submit a new preapproval request with the additional information. This is to your benefit, as the process is faster than an appeal. You should include the requested documentation with your submission, and clearly indicate that new information is being provided.
Prescription Coverage Appeals

If the appeal involves a prescription issue, please submit your request using the PacificSource Community Solutions Provider Appeal Form. The form is available online at CommunitySolutions.PacificSource.com or via InTouch. Please fill these out completely, with the following minimum information:

- Member name/identification number
- Provider name and contact person
- Contact phone/fax number
- Preapproval number
- Prescription denied
- Reason for the appeal (why you believe the prescription should be covered—please be detailed)
- Any pertinent clinical information or related documentation that would be of assistance in reviewing the request

The appeal forms include mailing and fax information.

Your appeal should include supporting medical information indicating why the original decision should be overturned. Appeals that indicate disagreement with a coverage decision, without providing additional information to support further review, may result in an unchanged decision.

Every effort is made by appeal representatives to process your requests as quickly as possible. For prescription appeals, this may take up to 30 calendar days. We will consider expediting a decision if a physician requests it with a clear indication that waiting up to 30 calendar days to receive a coverage determination may place the patient’s health in jeopardy. When PacificSource Community Solutions accepts a request to expedite a review, a coverage resolution will be issued within 72 hours of receipt of your request.

When a preapproval has been denied because PacificSource Community Solutions requested additional documentation, but did not receive it in a timely manner and resulted in a denial of coverage, please consider submitting a new preapproval request instead of an appeal. Include the additional information requested and clearly indicate new information is being provided.

This is the only level of appeal available to providers for prescriptions.

Claim Appeals

If the appeal involves a claim issue, please submit your request using the PacificSource Community Solutions Provider Appeal Form. The form is available online at CommunitySolutions.PacificSource.com or via InTouch. Please fill these out completely, with the following minimum information:

- Member name/identification number
- Provider name and contact person
- Contact phone/fax number
- Claim number
- Date of service
- Reason for the appeal (why you believe the claim should be covered; please be detailed)
- Any pertinent clinical information or related documentation that would be of assistance in reviewing the request

The appeal forms include mailing and fax information.
Please include comprehensive documentation that will help us investigate the claim in question. This should include, at a minimum, a detailed description of the issue in dispute, the basis for your disagreement, as well as all evidence and documentation supporting your position. Incomplete appeals will be returned for additional information.

In cases where a claim payment denial is considered member responsibility (e.g., instances where the member signed a valid waiver in advance, accepting financial responsibility for the services received), then the member may file an appeal on his/her own behalf, following the member appeals process. This does not prohibit you from also filing an appeal for payment. If you appeal a claim denial where the member has signed a valid waiver and the denial is upheld by the plan as member responsibility, then the member may be billed for the services. However, in cases where a valid waiver was not obtained from the member, then Oregon Health Authority prohibits billing the member, per Oregon Administrative Rule 410-120-1280.

Claims denied for reasons such as invalid coding or invalid place of service, etc., should not be submitted for rebill via the appeals process. In these cases, it is more appropriate to contact the Claims Department with a “rebill” or “corrected claim” submission.

**Appeal Resolutions**

Reviewers not involved in the initial coverage determination participate in an appeal resolution, which is issued to the appealing provider in writing (typically via fax) within 30 calendar days of receipt of the appeal. This time frame may be extended if the reviewer requires additional information to make a determination, and this is of benefit to the member or provider.

All appeals are subject to plan benefits, medical necessity, coverage criteria, and member’s enrollment status at the time of service.

**Noncontracted Providers**

The plan does not offer appeal rights to noncontracted providers. For claims denied due to timely filing and coding reasons, a noncontracted provider may resubmit the claim through the claim rebill process (by resubmitting the claim with corrections or supporting documentation).

Provider acknowledges that subject to all applicable federal and state statutory and regulatory limitations, PacificSource Community Solutions shall have access at reasonable times upon reasonable demand to the books, records, and papers of providers relating to healthcare services provided to members. Such access shall include, but is not limited to, allowing review by the PacificSource Community Solutions Medical Director and/or his or her designee of a random selection of provider’s office charts relating to members for purposes of PacificSource Community Solutions peer review, utilization review, and quality assurance programs.

**4.8.3 Medicare Appeals**

A provider appeal guide is available online at Medicare.PacificSource.com/Providers/AppealsGuide. For any questions, please contact a Provider Services Representative at (541) 684-5580 or (800) 624-6052, ext. 2580.

As an in-network provider, you agree to adhere to PacificSource Medicare’s appeal procedures.

You have the opportunity to request that PacificSource Medicare reconsider a coverage decision that affects you adversely, such as a denial of claim payment, or as a patient advocate for a prior authorization coverage denial. This is exercised via the Provider Appeal process.
If you fail to submit a complete and timely appeal, PacificSource Medicare will consider that you have accepted our coverage determination and have waived further appeal processes regarding the issue.

All appeals must be received by PacificSource Medicare within 60 calendar days of the coverage determination date (i.e., Explanation of Payment or Denial of Medical Coverage). PacificSource Medicare may consider exceptions to the filing timelines within reasonable limits if you can show “good cause” that prevented timely filing due to circumstances beyond your control. Please provide this information with your appeal.

Untimely appeals without “good cause” are dismissed without review.

Upon receipt, we will send you a notice to acknowledge your appeal. This provides direct contact information should you have any questions or wish to provide additional information during the review process.

**Preapproval Appeals**

If the appeal involves utilization management issues, please note we will only reconsider a noncoverage decision if you provide additional information (not previously reviewed by PacificSource Medicare) that you believe will impact our original decision. Submit your request using the PacificSource Medicare Provider Appeal Form, available online at [Medicare.PacificSource.com/Providers/AppealsGuide](Medicare.PacificSource.com/Providers/AppealsGuide). Please fill it out completely. It should include the following minimum information:

- Member name/identification number
- Provider name and contact person
- Contact phone/fax number
- Preapproval number
- Service or item denied
- Reason for the appeal (why you believe the service should be covered in detail)
- Any pertinent clinical information or related documentation that would be of assistance in reviewing the request and supporting the reasons for reversing the noncoverage decision.

The appeal form includes mailing and fax information.

Your appeal should include supporting medical information to support a change in decision. Appeals based on a denial of coverage as experimental/investigational should also include peer-reviewed literature supporting your position. Appeals that indicate disagreement with a coverage decision, without providing information to support further review, may result in an unchanged decision.

Every effort is made by appeal representatives to process your requests and issue a resolution as quickly as possible. This may take up to 30 calendar days. A review may be expedited if a physician requests it with clear indication that waiting up to 30 calendar days to receive a coverage decision may place the patient’s health in jeopardy. **When PacificSource Medicare accepts a request to expedite a review, a coverage resolution will be issued within 72 hours of receipt of your request.**

If a preapproval was denied because the PacificSource Medicare reviewer requested additional documentation but did not receive it in a timely manner, please consider submitting a new preapproval request. With your new request, include the additional information requested and clearly indicate that you request a reopening of your authorization request with new information.

This is the only level of appeal available to providers who are not the member’s treating physician. Prior authorization appeals submitted by a member’s treating physician on behalf of the member will follow an automatic second level review process if the noncoverage decision is upheld. The treating physician will be advised via the resolution letter when a second level review is taking place. If you are a treating...
physician filing on behalf of the member, CMS requires that you provide notice to the member that you
are appealing the noncoverage decision.

**Prescription Coverage Appeals**

If the appeal involves a Part D prescription issue, please submit your request using the PacificSource
Medicare Provider Appeal Form. If you are the prescriber, you can also use the Request for
Redetermination of Medicare Prescription Drug Denial Form. Both forms are available online at
Medicare.Pacificsource.com. Please fill these out completely, with the following minimum information:

- Member name/identification number
- Provider name and contact person
- Contact phone/fax number
- Preapproval number
- Prescription denied
- Reason for the appeal (why you believe the prescription should be covered in detail)
- Any pertinent clinical information or related documentation that would be of assistance in
  reviewing the request

The appeal forms include mailing and fax information.

Your appeal should include supporting medical information indicating why the original decision should be
overturned. Appeals that indicate disagreement with a coverage decision, without providing additional
information to support further review, may result in an unchanged decision.

Every effort is made by appeal representatives to process your requests as quickly as possible. For
prescription appeals, this may take up to seven calendar days. We will consider expediting a decision if a
physician requests it with a clear indication that waiting up to seven calendar days to receive a coverage
determination may place the patient’s health in jeopardy. When PacificSource Medicare accepts a request
to expedite a review, a coverage resolution will be issued within 72 hours of receipt or your request.

When a preapproval has been denied because PacificSource Medicare requested additional documentation,
but did not receive it in a timely manner and resulted in a denial of coverage, please consider submitting
a new prior authorization request instead of an appeal. Include the additional information requested and
clearly indicate that you request a reopening of your authorization request with new information.

This is the only level of appeal available to providers for Part D prescriptions.

**Claim Appeals**

If your appeal involves claim nonpayment ($0 payment) issues, please include clear documentation that
will help us research the claim in question. You can include a copy of the original claim, the Explanation
of Payment, and any records that support your argument for payment. Submit your request using the
PacificSource Medicare Provider Appeal Form, which is available online at Medicare.PacificSource.com.
Please fill it out completely. It should include the following minimum information:

- Member name/identification number
- Provider name and contact person
- Contact phone/fax number
- Claim number, including date of service
- Service or item denied
• Reason for the appeal (why you believe the service should be covered in detail)
• Any pertinent clinical information or related documentation that would be of assistance in reviewing the request to support the reasons for reversing the noncoverage decision

The appeal form includes mailing and fax information.

Claims denied for reasons such as invalid coding, invalid place of service, duplicate claim, etc., should not be submitted via the appeals process. In these cases, it is more appropriate to contact the Claims department with your reconsideration or “corrected claim” request. PacificSource Medicare makes available our prior authorization requirements via the online Authorization grid. However, typical claim appeals involve denials based on lack of preapproval. Examples of appeals that may result in upheld denials include:

• Provider used an incorrect authorization grid, or indicates unawareness of prior authorization requirements.
• Provider did not confirm member’s coverage prior to provision of services, and was unaware of, or did not follow preapproval requirements.
• Provider’s records indicate accurate coverage information. However, staff did not contact PacificSource Medicare to obtain a preapproval.
• Provider failed to call with utilization review and notification of an inpatient admission.
• The treating provider indicates the referring provider did not obtain a preapproval. PacificSource Medicare considers that it is the responsibility of both providers to confirm preapproval.

This is the only level of appeal available to contracted providers.

**Appeal Resolutions**

Reviewers who were not involved in the initial coverage decision participate in the appeal review. A resolution will be issued in writing within 30 calendar days of receipt of the appeal (a preservice appeal, 60 days for a postservice (claim) appeal) for a standard review, seven calendar days for a Part D prescription review, and 72 hours for an expedited review. These timeframes may be extended if the reviewer requires additional information to make a determination or if the provider or member requests it.

All appeal resolutions are subject to plan benefits, medical necessity, coverage criteria, and member’s enrollment status at the time of service.

**Noncontracted Providers**

The Center for Medicare and Medicaid Services (CMS) has provided an avenue by which noncontracted providers may dispute the amount of reimbursement made by the plan for a covered service. These include any decisions where a noncontracted provider contends that the amount paid by PacificSource Medicare for a covered service is less than the amount that would have been paid under Original Medicare. Provider payment disputes also include instances where there is a disagreement between a noncontracted provider and the plan about the plan’s decision to pay for a different service than that billed, often referred to as down-coding of claims.

This process is not available to plan contracted providers.

5. **Referrals**

5.1 **Referral Policy**

**Medicaid Member Referrals**

A “referral” is the process by which the member’s primary care provider (PCP) directs a member to obtain care for covered services from other health professionals in an office setting. Referral requirements do not apply to Legacy IDS. Please reference our prior authorization section for details regarding prior authorization guidelines.

Please note: The referral must be submitted directly to PacificSource Community Solutions and approved by the PCP. Referrals do not supersede other program requirements such as:

- Medical necessity,
- Eligibility,
- Preapproval requirements, or
- Coverage limitations.

Dental providers: Please refer to your dental care organization referral policy.

A “preapproval” is defined as a request for a specific service that requires a review to determine medical necessity. Services that require preapproval are outlined on our website at [CommunitySolutions.PacificSource.com](http://CommunitySolutions.PacificSource.com).

Before seeing an in-network specialty provider, a member must obtain a referral from his or her PCP. If additional services from another specialty provider are needed, the PCP will coordinate a referral to the appropriate specialist. Requests to see an out-of-network provider must be submitted via the preapproval process and are not considered a referral.

In most cases, referrals must be submitted by the member’s PCP. The referral request can be initiated by the specialist in the InTouch portal. However, this referral request must be approved by the PCP. Under special circumstances, a specialist may be granted sub-referral authority. This capability is granted by the PCP and allows specialist to request on-going treatment for the member’s current condition. This includes the ability to request additional office visits as well as referrals to other in-network specialists for continued treatment of the initial condition.

A specialist may bypass PCP approval for follow-up appointments after:

- ER/ED visits
- Urgent Care visits
- Inpatient stays

All PacificSource Community Solution members have access to contracted specialists for second opinions for a medical, dental, or behavioral health condition. A second opinion is another specialist’s opinion about treatment for a medical condition diagnosed by the primary specialist. A referral request must be submitted for a second opinion.

**Please note:** Sub-referral authority is only effective for the time frame indicated in the original PCP-approved referral.
A referral allows members to see an in-network specialty provider for covered services rendered in their office except services requiring preapproval. Payment for these services will be subject to eligibility, funded conditions, medical appropriateness, and established medical criteria.

Procedures or services that require preapproval cannot be included in a referral. Providers must submit a request for these services via the preapproval process.

If the member had a previously scheduled office visit before becoming eligible with PacificSource Community Solutions, a referral from the member’s PCP is still required.

Referrals and preapprovals may be required when PacificSource Community Solutions is the secondary payor. They are required if the service provided is not covered by the primary insurance or if the requested services is indicated as below-the-line or non-covered based on OHA’s Prioritized List of Health Services and/or PacificSource Community Solutions Prior Authorization grid.

**Medicare Member Referrals**

As of January 1, 2019, PacificSource Medicare plans will not require a referral to see an in-network provider. Referrals for out-of-network providers are considered a prior authorization.

### 5.2 Referral Procedure

Referral requirements do not apply to Legacy Integrated Delivery System (IDS). Please reference our prior authorization section for details regarding prior authorization guidelines. When the services of a specialist are necessary, the primary care practitioner (PCP) requests a referral to a panel specialist through the Health Services department or managed care office. The referral coordinator issues approval or non-approval for the referral and communicates the decision to the member, PCP, and specialist. PacificSource requires the following information for processing referrals:

**Medicaid:** A referral can be submitted electronically through InTouch, our secure, online provider portal. InTouch can be accessed by visiting CommunitySolutions.PacificSource.com/Providers.

Information required when submitting a referral request:

- Member name, date of birth, and member ID number
- Referring provider information and contact information
- Treating provider or facility name and contact information
- Diagnosis code(s)
- Start date of request, time frame, and number of visits (start and end dates must be clearly defined)
- Chart notes
  - Member name and ID number
  - Ordering provider information (PCP) and contact information
  - Treating provider (or facility name) and contact information
  - Diagnosis code(s)
  - Start date of request

Surgery is counted as one of the referral’s authorized visits, regardless of the place of service. Approved specialist services occurring after the procedure’s global period, but within the time period requested, are still available to the member.
The following restrictions apply:

- Referrals must be made to a specialist on the appropriate panel, unless the specialty services are not available on that panel.
- Referrals should be made for covered diagnoses only.

As long as the referral request is submitted on or prior to the treatment date and the referral is approved, the effective date requested on the referral will be granted.

If you see a patient prior to receiving the referral determination, you may want to have the patient sign a liability waiver for the specific services and/or procedures rendered, should the referral request be denied.

Please call Customer Service for benefit information. If you have other questions or concerns, contact the Health Services department by phone at (541) 684-5584 or toll-free at (888) 691-8209, or by email at healthservices@pacificsource.com.

- The approved referral covers services from any in-network provider that practices in the same group and has the same specialty as the provider indicated on the approved request.
- If the referral request has not been approved at the time of service and the referral request is submitted on or prior to the treatment date and the referral is approved, the effective date requested on the referral will be granted.
- Referral approval is, in part, based on the coverage of the diagnosis submitted by the member’s PCP.
- The initial (one) visit will be allowed with an approved referral (including Below the Line - BTL conditions) regardless of the number of visits requested. Approval for additional follow-up visits is subject to OHP funding (line placement of diagnosis) and will require medical review.
- To determine if your patient’s condition is funded by the OHP, LineFinder can be found online at Intouch.PacificSource.com/LineFinder or contact customer service.
- We respond to standard referral requests within 14 calendar days.
- A determination notice is viewable online in InTouch.

5.3 Referral Management Entities

Each physician or provider who is contracted for products with referral requirements needs to request referrals through a designated referral authorization entity. The referral management or authorization entity may be a department in a large clinic, an IPA office that represents the physicians and/or providers, or an independent company. In addition, physicians and providers may choose to have PacificSource perform the referral review process.

Referral operations are typically comprised of a managed care coordinator, a medical director, and a committee. The coordinator receives the referral authorization request and, based on an established set of criteria, evaluates the request for approval. If the coordinator is unable to make a determination, the request is referred to the Medical Director. Referral determinations are communicated to PacificSource for appropriate data entry into the claims system.

Know who manages your referrals. Check your provider contract provision regarding referrals, or contact our Provider Network Management by phone at (541) 684-5580 or (800) 624-6052, ext. 2580, or by email at providernet@pacificsource.com.
5.4 Out-of-Network Referrals

Requests to see an out-of-network provider, including for second opinions, must be submitted via the preapproval process and are not considered a referral. For referrals to a noncontracted provider, PacificSource must approve the service in advance. If the service is not approved, the plan will not pay for it. There are a few exceptions in which a member can see a noncontracted provider without getting an approval in advance. These are:

- Ambulance and Emergency Room Services (for emergencies);
- Family Planning; and
- Some Immunizations (shots).

If your patient requires services not available within the panel or network, please contact our Health Services department by phone at (541) 684-5584 or toll-free at (888) 691-8209, or by email at healthservices@pacificsource.com.

5.5 Referral Not Required

Medicaid Member List of Services

Referrals are not required for the following. However, these services are subject to the plan benefits and eligibility:

- Annual women’s exam
- Anticoagulation office visits
- Certain immunizations (shots) (may be received from any provider)
- Dialysis
- Emergency care
- Family planning services (may be given by any provider)
- Health Department services
- Hospice
- Intensive Care Coordination (ICC) identified members (including members with special health care needs).
- Lactation services (help with breastfeeding your baby). Lactation support services (including education and counseling by trained providers) are covered for pregnant and postpartum women (for six months postpartum) per Guideline Note 140 of the OHP Prioritized List of Health Services.
- Maternity care—a referral from the PCP is needed to see a specialist other than the maternity doctor
- Members in a designated special needs rate group (example: HIV)
- Mental healthcare
- Palliative Care
- Routine vision exams (only available to children and pregnant women)
- School-based health center services
- Substance use disorder treatment services (drug and alcohol treatment services)
- Urgent care
5.6 **Referrals That Are Not Approved**

When Health Services or the delegated managed care entity does not approve a referral request, the PCP, specialist, and member are notified by mail or fax. It is the PCP’s responsibility to discuss other options with the member. Appeal rights will be included with the determination, and the PCP or member may appeal the decision in writing by submitting supporting documentation for re-evaluation of the request.

Referrals may not be approved for reasons including, but not limited to, the following:

- Not medically necessary
- Not a covered benefit
- Request for service/visit is included in the global service
- Service is available within the provider panel/network
- Member has self-referred

PCPs are expected to discuss referrals that are not approved with their patients. Members have the right to appeal through PacificSource. Also see “Appeals” under the Physicians and Providers section.

5.7 **Retroactive Referrals**

We realize there are sometimes instances when a referral may not have been in place prior to services being rendered; this should be the exception and not the rule. Please contact your PacificSource Provider Service Representative in these instances and we will assist you in this process.

**Medicaid:** Referrals are allowed for office visits resulting from urgent/emergent situations. In cases where the patient’s condition was emergent and services were provided, the provider or facility is expected to contact PacificSource Community Solutions within two (2) business days for an authorization. Non-emergent services will not be considered for retroactive approvals.
6. Medical Management

6.1 Medical Necessity and Coverage

Services must be medically necessary to be eligible for reimbursement. “Medically Necessary” and “Medical Necessity” are terms PacificSource uses to define procedures, treatments, supplies, devices, equipment, facilities, or drugs that a medical practitioner, exercising prudent clinical judgment, would provide to a patient for the purpose of preventing, evaluating, diagnosing, or treating an illness, injury or disease of its symptoms, and that are:

- In accordance with generally accepted standards of medical practice.
- Clinically appropriate in terms of type, frequency, extent, site, and duration.
- Not primarily for the convenience of the patient, physician or other healthcare provider.
- As likely to produce a significant positive outcome as, and no more likely to produce a negative outcome than, any other service or supply, both as to the disease or injury involved and the patient’s overall health condition
- Not more costly than an alternative service or sequence of services at least as likely to produce equivalent therapeutic or diagnostic results as to the prevention, evaluation, diagnosis or treatment of the patient’s illness, injury, or disease or its symptoms.

A service or supply that is ordered or given by a provider does not in itself make it medically necessary.

Medical necessity determinations are not made arbitrarily. When a PacificSource claims adjudicator reviews a claim, we compare the treatment with the usual treatment provided by physicians and/or providers and hospitals to patients having similar conditions. Services are checked for correlation with the diagnosis or problem.

When the adjudicator cannot match the services with the diagnosis, or when the length of stay seems inappropriate for the diagnosis given, the claim is referred to our Health Services department. A staff of licensed clinicians, under the direction of the Chief Medical Officer will research and review the medical necessity. Chart notes and supporting documentation may be requested to complete the review process. If a discrepancy remains, the issue may be referred to the Medical Director or Assistant Medical Director for review. Members have the right to appeal.

Medicaid: Medical Coverage

Medical coverage is determined by the Prioritized List. The Prioritized List emphasizes prevention and patient education. In general:

- Treatments that help prevent illness are ranked higher than services that treat illness after it occurs.
- OHP covers treatments that are ranked on a covered Prioritized List line for the client’s reported medical condition.

PacificSource Community Solutions determines medical coverage based on the current published Prioritized List. You can access the Prioritized List on our website at InTouch.PacificSource.com/LineFinder. Select the appropriate PDF file under the “Further Reading” section. This information is directly taken from the Oregon Health Authority (OHA) website and updated as OHA updates.
6.2 Care/Case Management

Overview of Care Management Program

Primary care provider care homes and other primary care provider (PCP) models are the focal point of coordinated and integrated care, so that members have a consistent and stable relationship with a care team responsible for comprehensive care management.

PacificSource Care Management services are offered as a supplemental resource to the provider care team to assist them in serving members that present them with special healthcare needs, such as obstacles in complex behavioral, medical, dental, and social determinants of health.

When member high-risk and high-utilization issues require intensive care coordination and the creation of an aligned community plan of care, providers may request assistance from the PacificSource Care/Case Management team.

Complex Care/Case Management and Case Management services are provided by PacificSource to members at no additional cost.

Members enrolled in Complex Case Management typically have extensive and intensive healthcare needs such as, but not limited to, one or more of the following:

- Spinal cord injury/trauma
- Eating disorders
- Amyotrophic lateral sclerosis (ALS-Lou Gehrig’s Disease)
- Acute or chronic conditions requiring specialized treatment programs
- All pediatric cancer cases
- Selected adult cancer
- Accordant care cases with frequent ER or inpatient hospitalizations
- Inpatient re-admissions (within 30 days)
- Multiple inpatient stays within a year (five or more) or multiple ED visits within a year (four or more)
- EDIE Care Recommendations are not adequate to address community coordination needs
- Co-morbid complex medical and behavioral health conditions that significantly impact care
- High-risk pregnancy (any reason)
- Limited or no engagement with the primary care physician, unless a specialist is acting as a PCP
- Multiple facility ED and/or IP use within a year (three or more)—for instance, goes to two EDs in different towns and one of those lead to an Inpatient Admission
- Complex medical condition and social determinants causing severe obstacles to care

2019 CCM list below

The following commercial members are identified for Complex Case Management program participation in 2019:

- High risk members with a primary diagnosis of Diabetes, experiencing 3 or more chronic conditions and who have had an inpatient stay within the past 6 months
- High risk members with multiple conditions and/or barriers to care identified during an inpatient stay and anticipated to require extensive resources CCM Identification List
• High risk individuals referred through the PreManage Process and requiring case management services anticipated to last 60 days or greater
• Multiple admissions, readmissions, and emergency department visits, not captured by the Premanage process
• Individuals requiring a prior authorization for inpatient services with a behavioral health diagnosis of SPMI
• Individuals requiring a prior authorization for services with a medical diagnosis of ALS.
• Traumatic Brain injury, Spinal Cord Injury, or Multi trauma identified by an inpatient event anticipated to require extensive rehabilitation

PacificSource uses risk scoring that is derived from report data to prompt case management services, along with the criteria above. Care Management prioritizes risk levels that are stratified as “very high and high.”

Support Team
Utilizing Nurse Care Managers, Member Support Specialists, Behavioral Health Specialists and Pharmacist consultation, when appropriate, and under the guidance of the Medical Director, the PacificSource Community Solutions Care Management team and consultants work with providers and community partners in promoting provider engagement with members and in bridging communication and planning within systems of care.

Care Management is a collaborative process, building from the PCP, PCD, and behavioral health provider’s direct relationship with the member.

Members enrolled in Complex Case Management engage frequently with an assigned nurse case manager who works with the member on a mutually agreed upon set of health-related goals and outcomes.

Case Management services are designed to help members who may require assistance with transfers from hospital to home, home health, home infusion, skilled nursing facility, or acute inpatient rehabilitation. They can also help with other questions related to health-related concerns, new diagnoses, finding an appropriate provider, etc.

When case management services are initiated, PacificSource will work with the patient’s physician or provider on a case-by-case basis. Case management interventions support the provider-patient relationship, identify and facilitate removal of barriers to good self-management and promote adherence to the prescribed treatment plan.

PacificSource reserves the right to delegate a third party to assist with, or perform the function of, case management. PacificSource will have final authority in all case management decisions.

Payment of benefits for supplemental services is at the sole discretion of PacificSource and may be made as a substitute for other covered benefits based on PacificSource’s evaluation of the member’s particular case. PacificSource may limit payment for supplemental services to a specific period of time.

Members may request Complex Case Management or Case Management services by contacting our Health Services department. To speak with someone regarding Case Management, please contact our Health Services department.
Commercial:

Phone:
Oregon and Washington: (541) 684-5584, toll-free (888) 691-8209, ext. 2584
Idaho: (208) 333-1563, toll-free (800) 688-5008
Montana: (406) 442-6595, toll-free (877) 570-1563

Fax:
Oregon and Washington: (541) 225-3625
Idaho: (208) 333-1597
Montana: (406) 441-3378

Medicaid:

The Care Management department is available Monday through Friday, from 8:00 a.m. to 5:00 p.m. local time zone by calling: (541) 330-2507 or (888) 970-2507.

Medicare:

The Care Management department and Member Support Specialists are available Monday through Friday, 8:00 a.m. through 5:00 p.m. local time zone.

Phone:
Oregon and Washington: (541) 385-5315 or (888) 970-2507
Idaho: (208) 862-9725 or (888) 862-9725

Email:
CaseManagementMedicare@pacificsource.com or Member Support at BoiseMSS@pacificsource.com.

Role of PacificSource Nurse Care/Case Manager

It is the responsibility of the care manager to:

- Monitor all aspects of care both requested and dispersed.
- Coordinate care in cooperation with the PCP and other plan providers, providing assistance as needed.
- Evaluate alternatives to care.
- Document care information and actions taken.
- Develop a care management problem list.
- Coordinate a member’s medical care with community resources.
- Educate members as appropriate about disease processes, procedures and treatments, and appropriate use of plan resources.

Member education is provided on a variety of topics and may include general information about disease processes, an analysis of medication usage for compliance and contraindications, or plan-specific information on routine preventive health screening, as well as screening for disease-related complications. Member education may occur in a variety of settings using a number of different resources, depending on member need and level of understanding:

- Cost-effective, evidence based educational resources will be utilized on a case-by-case basis.
- Where possible members will be apprised of disease specific, community based educational opportunities. This information will be made available in the quarterly newsletter to members and other sources as developed.
- Disease prevention and disease specific information will be included in the quarterly newsletter to members.
- One-on-ones will be conducted with Nurse Care Managers

Care management is a collaborative process. The PCP relationship with the member is a vital resource necessary to adequately develop a plan of care.

**Member Support Specialists**

Member Support Specialists work in collaboration with Nurse Care Managers, the member’s PCP, and community partners. They assist with the member’s healthcare needs, identify gaps in care and resolve barriers to access. The Member Support Specialist may make referrals to our internal specialists such as: nurse care managers, pharmacists, and behavioral health staff. They may also directly assist members in areas such as:

- Helping members understand their healthcare plan limits, benefits, and guidelines
- Connecting members with their PCP
- Coordinating community support and social services

**Medicaid: Intensive Care Coordination Services (ICC)**

ICC is a specialized care management service Oregon Health Plan (OHP) managed care plans provide to OHP members who are aged 65 or older, blind, disabled, or have special healthcare needs. PacificSource Community Solutions has staff dedicated to provide ICC consultation and support services.

ICC services may include providing assistance to ensure timely access to providers and services; coordination of care to ensure consideration is given to unique needs in treatment planning; assistance to providers with coordination of services and discharge planning; coordination of community support and social services, as necessary and appropriate.

Care Management and Coordination staff may collect information to assist in identifying a member’s special need and development of a plan. This may include talking to or meeting with members, providers or caretakers, reviewing medical records, and assessing their support systems, communication and transportation.

Care Management and Coordination staff may assist and provide consultation for the primary care team’s development and update of service planning, in order to promote member engagement and coordination of all services.

The OHP member’s primary care provider is responsible for developing a treatment plan for the member with the member’s participation. This should include a consultation with any specialist caring for the member. The treatment plan should be in accordance with any applicable state quality assurance and utilization review standards.

Following enrollment of an ICC member, the Member Insight Report will be updated to reflect ICC eligibility. The member’s primary care provider (PCP), dental provider and behavioral health provider are sent the Member Insight Report indicating the member is eligible for ICC under the “ICC Flag” column. Providers/provider groups receive regular data analytic reports that monitor population health and care metrics impacting ICC eligible members as well as other populations.

Providers are encouraged to contact PacificSource Community Solutions and request ICC services for members that are aged, blind, disabled, or have special healthcare needs. Ask for the Intensive Care Management and Coordination team at (541) 330-2507 or toll-free (888) 970-2507.
How Members are Identified

Care management may be generated under the following terms:

- Contracted providers contacting PacificSource directly
- Community partners engaged directly in coordination of care activities
- Referrals from other internal departments, such as Utilization Review, Customer Service, or Behavioral Health
- Members and member representatives contacting PacificSource directly
- Data analysis to identify high-risk and special-health-needs patients
- State agency referrals

PacificSource Community Solutions members may be identified through the completion of a health assessment survey (wellness survey) administered after enrollment. The health assessment tool is completed by the member or their representative. It provides information that allows the care manager to assess the level of need for management and intervention, as well as health and disease education.

6.3 Quality Improvement and Medical Management

PacificSource relies on the Clinical Quality Utilization Management (CQUM) Committee and Pharmacy & Therapeutics Committee to be its advisory body for quality, utilization, pharmacy, therapeutics, and performance improvement activities. The committees have the responsibility to develop and endorse all clinical policies and formulary coverage decisions. The CQUM committee consists of physicians and pharmacists practicing in the communities we serve. These committee members represent our contracted providers. Evidenced-based guidelines are reviewed and adopted by the CQUM committee. Examples include MCG, Hayes, and AIM clinical guidelines. Guidelines are updated on an annual basis or more often in the presence of significant new medical information. Guidelines should be communicated by members of the CQUM committee to their representative groups. Guidelines are also communicated to providers as needed during clinical reviews, through the company website, sent upon request, and sent to providers when the guidelines relate to quality improvement or disease management projects. Representation on the CQUM Committee includes providers who are free of conflict with PacificSource.

Program Overview

High quality healthcare is a priority at PacificSource Community Solutions. Our Quality Improvement Program is under the direction of our Medical Director and managed by our Quality department. This program works in collaboration with practitioners in our plan network and the community. The program foundation is built on evidence-based guidelines and state and national regulations to achieve the triple aim of providing better health, better care, and better cost to the people and communities we serve.

The Quality Improvement Program Goals:

- Make care safer by reducing harm caused in the delivery of care.
- Strengthen person and family engagement as partners in care.
- Promote effective communication and coordination of care.
- Promote effective prevention and treatment of chronic disease.
- Work with communities to promote best practices of healthy living.
- Make care affordable.
The quality improvement program strategies:

- Eliminate racial and ethnic disparities.
- Strengthen infrastructure and data systems.
- Enable local innovations.
- Foster learning organizations.

How do we decide where to focus our improvement efforts?

The CQUM Committee reviews several sources of data and information available to plans to help identify areas on which to focus improvement efforts.

**Consumer Assessment of Healthcare Providers and Systems (CAHPS)** is an annual survey that CMS requires all health plans to send to its members. The survey asks members to rate their health plan and providers on access to care, coordination of care, customer service, and overall satisfaction. The survey is sent to random sample of member from March to May.

**CCO Quality Incentive Metrics (QIM) for Medicaid:** The State has developed 13 quality health metrics to demonstrate how well we are improving care, making quality care accessible, eliminating health disparities and curbing the rising cost of healthcare. Each metric has a State baseline (starting point) and state benchmark (goal). The current incentive measures are:

1. Adolescent immunizations
2. Assessments within 60 days for children in DHS Custody
3. Childhood immunizations status
4. Cigarette smoking prevalence
5. Depression screening and follow-up plan
6. Diabetes: HbA1c Poor Control
7. Disparity measure: Emergency department utilization among members with mental illness
8. Drug and alcohol screening (SBIRT)
9. Initiation and engagement of alcohol or dependence treatment
10. Oral evaluation for adults with diabetes
11. Preventive dental for children ages one to fourteen
12. Timeliness of postpartum care
13. Well child checks for children ages three to six

**Access to Care Standards:** PacificSource has established timeliness access standards of care related to primary care, emergent/urgent care, and behavioral healthcare.

**Health Outcomes Survey (HOS)** surveys members about their perceptions of their physical and mental health over a two-year period to assess whether members have maintained or improved their health. It also collects health characteristic information such as chronic conditions and limitations in ADLs.

**Healthcare Effectiveness Data and Information Set (HEDIS®)** measures various aspects, such as Effectiveness of Care, Access/Availability, Use of Services, Cost of Care, and Health Plan Descriptive Information. Examples of HEDIS measures produced from claims data are as follows.

- Breast Cancer Screening
- Disease Modifying Anti-Rheumatic Drug Therapy in Rheumatoid Arthritis
- Follow-up After Hospitalization for Mental Illness
• Comprehensive Diabetic Care - Retinopathy Screening
• Osteoporosis Management in Women Who had a Fracture
• Pharmacotherapy Management of COPD Exacerbation
• Potentially Harmful Drug-Disease Interactions in the Elderly
• Use of High-Risk Medications in the Elderly
• Use of Spirometry Testing in the Assessment and Diagnosis of COPD
• Plan All Cause Readmissions

Six of the Effectiveness of Care Measures require that we annually collect information from members’ medical records. Unless otherwise noted, copies of medical records will be provided at no cost to the plan.

• Documentation of Body Mass Index (BMI) once in prior two years
• Colorectal Cancer Screening—Colonoscopy in the past 10 years, Sigmoidoscopy in the past five years, annual FOBT, and DNA testing every three years.
• Comprehensive Diabetes Care—A1C screening, A1C control less than 9, LDL screening and control to less than 100, diabetic eye exam (i.e., retinopathy), blood pressure controlled to under 140/90.
• Controlling High Blood Pressure—Last BP of year less than 150/90.
• Medication Reconciliation Post Discharge
• Transitions of Care: Notice of Inpatient admission, Record of Discharge, Patient Engagement, and Medication Reconciliation Post Discharge.

Input from Members and Providers. Providers who participate as members of the CQUM Committee give input into the focus of improvement efforts through participation on that committee. Additionally, members’ grievances are monitored and trended for issues of concern. Grievance reports are shared at CQUM.

PacificSource Community Solutions has a Community Advisory Council (CAC). Most of the Council members are Oregon Health Plan members. Other members are from government agencies and groups that provide OHP services. The overarching purpose of the CAC is to ensure the health councils remain responsive to consumer and community health needs. The CAC is intended to enable consumers to take an active role in improving their own health and that of their family and community members.

6.3.1 Medicare Advantage Star Ratings

The Centers for Medicare & Medicaid Services (CMS) evaluates the quality of care and customer service of all Medicare Advantage (MA) and Prescription Drug (MA-PD) plans using a five-star rating system.

The two main types of Star Ratings are:

• An Overall Star Rating that combines all of our plan’s scores.
• Summary Star Rating that focuses on our medical or our prescription drug services.

Medicare Advantage plans are assessed on an annual basis and ratings may change from one year to the next. Each plan is assigned a score based on a 1 to 5 star scale:

• Excellent
• Above Average
• Average
• Below Average
• Poor
Star ratings provide Medicare beneficiaries a standardized way to compare plans based on quality and performance. CMS also utilizes star ratings to determine funding for Medicare Advantage plans.

**Star Rating Measures**

Current star ratings are based on categories including preventive care, managing chronic conditions, member satisfaction, customer service and pharmacy benefits. The data sources used by CMS to develop star ratings include:

- **HEDIS®**: Clinical performance indicators (access to care, receipt of preventive services, and management of chronic conditions).
- **Consumer Assessment of Healthcare Providers and Systems (CAHPS)**: Survey to evaluate member satisfaction with providers, health plan, and overall experience.
- **Medicare Health Outcomes Survey (HOS)**: Survey to evaluate physical and mental health and quality of life of Medicare beneficiaries.
- **Administrative and Compliance Measures**: Call center performance, grievance and appeals, CMS audits and member complaint tracking.
- **Part D (Pharmacy) Measures**: Medication adherence and accuracy of drug pricing and member experience

If you have questions about PacificSource Medicare star ratings and initiatives, please contact your PacificSource Provider Service Representative at (800) 624-6052. For general information about the CMS Star Rating System or to view current Star Ratings for Medicare Advantage and Part D plans, please visit the CMS Consumer website at Medicare.gov.

### 6.4 Preapproval/Preauthorization

Preapproval/preauthorization/prior authorization is the process by which providers verify coverage and receive preapproval from PacificSource before services or supplies are rendered. Preapproval establishes covered expenses based on benefits available, medical necessity, appropriate treatment setting, and/or anticipated length of stay. Some in-network medical services are covered only if an in-network provider receives preapproval from our plan. Lack of preauthorization could result in the member unknowingly becoming responsible for payment to a provider for services or supplies not covered by the plan. Questions or need to obtain a preapproval/preauthorization/prior authorization? Contact us.

#### 6.4.1 Services Requiring Preapproval/Preauthorization

The list of services that require preapproval/preauthorization is available for all lines of business at this website: AuthGrid.PacificSource.com

Following the initial preauthorization, please notify our Health Services department in the event of the following:

- When surgery has been rescheduled
- When there has been a change of facility
- When there has been a change of physician or provider

**Drug Preauthorization**

Please see the Pharmacy section of this manual.
Mental Health and Substance Use Disorder Services

Mental health and substance use disorder services are subject to all terms and provisions of the member’s specific health plan including limits, deductibles, copayments and/or benefit percentages shown on the Schedule. Providers must meet the credentialing and eligibility requirements of PacificSource. Only Joint Commission accredited programs are considered to be eligible mental health providers by PacificSource Health Plans. Mental health and substance use disorder programs must be licensed by the state in which they operate as a treatment program for the particular type or level of service that is provided or organizationally distinct within a facility.

The following levels of care require preauthorization by PacificSource: residential and partial hospitalization.

PacificSource expects timely notification—within 48 hours—of admissions requiring preauthorization. Admitting clinical information must be submitted within 48 hours for medical necessity determination and authorization to be completed. Lack of clinical information will result in coverage not being authorized. Initial assessment should include: initial treatment plan, discharge plan, and estimated length of stay.

PacificSource utilizes MCG’s Behavioral Health Guidelines to determine the clinical indications for admission for a primary mental health diagnoses. ASAM—American Society of Addiction Medicine (ASAM PPC-2R) is the clinical guide utilized in the assessment of appropriate levels of patient care for Substance-Related and Substance use disorders. Mental health and substance use disorders are those found in the most current edition of the Diagnostic and Statistical Manual of Mental Disorders classification system with specific exceptions as allowed by state and federal mandates. Currently this is the DSM 5.

The facility and provider must establish, document, and communicate medical necessity for admission, continued stay, and discharge from each level of care and treatment setting. Medical necessity must be met for continued coverage authorization in the treatment setting.

Treatment which is court ordered or required by a third party must also meet medical necessity criteria and will not be approved solely on the basis of court order or third party requirement. Additionally, a therapeutic boarding school or facility that combines a structured psychosocial setting with an academic educational program does not meet medical necessity criteria for this level of care.

PacificSource believes that mental health and substance use disorder services should occur as close as possible to the home area where the patient will be discharged to help facilitate a successful transition to community based services.

**Residential Treatment** is defined as a 24-hour inpatient level of care that provides a range of diagnostic and therapeutic behavioral services which cannot be provided on an outpatient basis. This level of care must have four or more continuous hours of treatment per day. This treatment occurs in a facility with 24/7, around-the-clock supervision on a unit that may or may not be locked depending on the specific program’s license.

Treatment focus is on improving function rather than maintenance of long term gains made in an earlier program. Residential treatment and coverage is not based on a preset number of days. A standardized “program” is not considered reason for medical necessity and continued stay at this level of care.

Residential treatment should occur as close as is possible to the home to which the patient will be discharged. If an out of area placement is unavoidable, there must be a family and facility commitment to assure regular family therapy and contact with the patient and the facility.
**Partial Hospitalization** is defined as a level of care that provides comprehensive behavioral services that are essentially the same in nature and intensity as those which would be provided in a residential or inpatient setting. This level is appropriate for a patient who may present with ongoing, imminent risk of harm to self or others, but is able to develop a plan to maintain safety without 24 hour psychiatric/medical and nursing care. This level of care is typically 5-8 hours per day, 5 days or less per week. This level of care is time-limited, used to stabilize acute symptoms.

**Intensive Outpatient (IOP)** is defined as a level of care for those patients who are not at imminent risk of harm to self or others. It is an appropriate level of care to generate new coping skills, or reinforce acquired skills that might be lost if the patient returned to a less structured outpatient setting. This level of care is generally 3-4 hours per day or less, 3-5 days per week.

**Discharge Guidelines**

- Medical necessity and continued stay guidelines are no longer met, or
- Appropriate and timely treatment is available at a less intensive level of care, or
- Maximum program benefits have been achieved and the patient is unlikely to make further positive progress at this level of care

**Discharge plans should include:**

- Coordination with family, outpatient providers, and community resources
- Timely and appropriate aftercare appointments set prior to discharge
- Prescription for needed medications and medications sufficient to bridge the time between discharge and follow up.

**6.4.2 Process**

PacificSource Health Plans requires preapproval/preauthorization of certain procedures and services to determine benefit eligibility, benefit availability, and medical necessity. This does not override our system clinical edits.

PacificSource expects timely notification (within 48 hours) of admissions requiring preauthorization. Admitting clinical information must be submitted within 48 hours for medical necessity determination and authorization to be completed. Lack of clinical information will result in coverage not being authorized. Initial assessment should include initial treatment plan, discharge plan, and estimated length of stay, and is necessary for facilitation of follow-up appointments.

Physicians and other provider offices may request preauthorization by contacting the PacificSource Health Services department. PacificSource will work with the physician or provider office to determine the following:

- Specific type(s) of services proposed (diagnosis and procedure codes)
- Appropriate treatment setting (inpatient or outpatient)
- Appropriate time of admission (same day or day before)
- Expected length of stay (For commercial members, length of stay is reviewed at the time of admission.)
- Identification of contracted physicians, providers, and/or facilities

In some cases, PacificSource may require more information or may request a second opinion.

Prior Authorization determinations are made within two business days for nonurgent preservice requests. For Medicare, nonurgent requests within 14 days.
Electronic Prior Authorization and Inpatient Notification Process

PacificSource Health Plans strongly encourages prior authorization (PA) and inpatient notification requests to be submitted via our provider portal, InTouch. We will contact your offices to assist you in getting an account created and assist with any training. Medicaid PAs and inpatient notification is required via electronic submission.

If you do not have access to InTouch, please visit www.OneHealthPort.com and register. Here is a link with some more information about InTouch as well: PacificSource.com/aboutproviderintouch.

In some cases, your billing office may be using it already. If so, you can contact them to find out who your administrator is on the account, and they can contact OneHealthPort to have additional users added. This can include front desk personnel or anyone who needs to submit PAs.

Please contact your Provider Service Representative should you have any questions. We will be happy to assist you in any training you might need to utilize this portal.

Commercial Process

The PacificSource Health Services department is ready to assist physicians, providers, and office staff with preauthorization services, and is available to answer questions. When all pertinent information needed to make a decision has been received, the preauthorization request will be processed according to the turnaround times established by state laws and regulations. You may reach the department in one of the following ways:

Phone:
Oregon and Washington: (541) 684-5584, toll-free (888) 691-8209, ext. 2584
Idaho: (208) 333-1563, toll-free (800) 688-5008
Montana: (406) 442-6595, toll-free (877) 570-1563

Fax:
Oregon: (541) 225-3625
Idaho: (208) 333-1597
Montana: (406) 441-3378

Address:
PacificSource Health Plans
Health Services Department
PO Box 7068
Springfield, OR 97475

For specific benefit information, please contact our Customer Service department by phone at (541) 684-5582 or toll-free at (888) 977-9299, or by email at cs@pacificsource.com. Alternatively, you may call our toll-free customer service phone line especially for commercial providers at (855) 896-5208 to verify member benefits.

Commercial member MRI, CT, and PET scan preauthorization requests may be submitted through AIM (American Imaging Management). Go online to the AIM web portal at americanimaging.net/goweb, or submit preauthorization requests via the call center at (877) 291-0510.

Medicaid Process

Preapproval is the process by which providers verify coverage and receive preapproval from PacificSource Community Solutions before services or supplies are rendered. Preapproval establishes covered expenses based on benefits available, medical necessity, appropriate treatment setting, and/or anticipated length of stay. Some in-network medical services are covered only if an in-network provider receives preapproval from our plan. The list of services that require preapproval is available on our website at CommunitySolutions.Pacificsource.com.
Dental providers: Please refer to the preapproval policies for your dental care organization.

Process

- Medical services that have been identified as high cost, over-utilized, and/or potentially unsafe require preapproval.
- The preapproval grid, located on our website at CommunitySolutions.PacificSource.com, details services that require preapproval.
- A request can come from any source if it supplies information useful in completing the request in an accurate thorough manner.
- Information will be accepted from specialty offices, facilities, vendors, therapy offices, etc., and should include appropriate clinical information, most current chart notes, and most specific diagnosis or procedure coding.

Emergent and urgent inpatient admissions do not require preapproval. However, you must notify PacificSource Community Solutions within two (2) business days from the date of service.

All preapproval and referral requests will be processed within 14 days from receipt of requested services. If you require an expedited review for urgent or emergent services, please indicate this on the submitted request. Please refer to the Retroactive Approval Guidelines section for the definition of urgent and emergent situations where an expedited request would be considered. We will process expedited requests within 72 hours.

When a PacificSource Community Solutions member’s coverage is secondary to PacificSource Medicare, the member may be eligible for PacificSource Community Solutions services. Please submit a preapproval request if required for PacificSource Community Solutions.

Medicare Process

The authorization request should be submitted via InTouch for Medicare Advantage members at Medicare.PacificSource.com/InTouch. Upon completion of the authorization, approved services will be given an authorization number. This number should be included on the claim. The authorization number can also be located online through InTouch.

The preapproval process is not complete until benefits and eligibility have been verified. The number of days the authorization is valid for is noted on line or in the approval letter. An extension to the standard authorization period may be requested.

Preapproval is not a guarantee of payment and the claims payment will be based on member eligibility at the time of service.

Process

- Medical services that have been identified as high cost, over-utilized, and/or potentially unsafe require preapproval.
- The preapproval grid, located on our website, Medicare.PacificSource.com, details services that require preapproval.
- A request can come from any source if it supplies information useful in completing the request in an accurate thorough manner.
- Information will be accepted from specialty offices, facilities, vendors, therapy offices, etc. and should include appropriate clinical information, most current chart notes, and most specific diagnosis or procedure coding.

Emergent and urgent inpatient admissions do not require preapproval. However, you must notify PacificSource Medicare within two business days from date of admission.
All preapproval and referral requests will be processed within 14 days from receipt of the request.
PacificSource Medicare understands that 14 days can sometimes place an unnecessary burden on
the provider and patient. If you require an expedited review, please indicate this on the documentation
submitted. We will process expedited requests within 72 hours. Please call our Health Services
department to follow up on your expedited request. Phone numbers are listed in the Who to
Contact section.

When a PacificSource Community Solutions member’s coverage is secondary to PacificSource Medicare,
PacificSource Medicare rules apply. If an authorization was not obtained, and it is denied by PacificSource
Medicare, it will also be denied by PacificSource Community Solutions.

In other cases where we are secondary, there are no authorization requirements.

Incomplete Preapproval and Referral Requests
Incomplete preapproval and referral requests will be denied. Examples of incomplete requests include:

- Lack of supporting documentation.
- Lack of identifying member information.
- Missing CPT/HCPC or diagnosis codes.
- Provider specialty or facility name not listed.

AIM Specialty Health® (AIM)
PacificSource has partnered with AIM Specialty Health® (AIM) to administer prior authorizations for non-
emergency advanced diagnostic imaging services, performed in an outpatient setting.

The modalities covered under this program include the following:

- Computed Tomography Scans (CT/CTA)
- Magnetic Resonance Imaging (MRI/MRA/MRS/MRM/fMRI)
- Nuclear Cardiology
- Positron Emission Tomography Scans (PET)

Please note: Imaging studies performed in conjunction with emergency room services, inpatient
hospitalization, outpatient surgery (hospitals and freestanding surgery centers), or hospital observation do
not require preapproval. Outpatient studies performed for urgent or emergent conditions will be subject
to a retrospective clinical claims review by PacificSource.

A complete list of services requiring preapproval is available on our websites. Services included in the
AIM program are noted in the description field.

To Request Preapproval through AIM:

Ordering/referring nonradiological physicians must contact AIM to obtain an order number before
scheduling elective outpatient diagnostic imaging services. In addition, servicing providers should confirm
that an order number has been obtained prior to service delivery.

There are two ways to obtain an order number for diagnostic imaging services:

- By calling AIM toll-free at (877) 291-0510.
- By using AIM’s ProviderPortal at https://ainspecialtyhealth.com/providerportal/. Since many
  providers already use AIM’s ProviderPortal, there is no need to register again. If a provider is new to
  AIM, they will need to register at https://ainspecialtyhealth.com/providerportal/.
Retrospective Review

PacificSource reserves the right to retrospectively review any type of medical service. Requests for retrospective review of hospital admissions for which we were not notified within two business days may be reviewed at our discretion. Retrospective utilization may require review of the full medical records and may be reviewed by our Medical Director.

6.4.3 Commercial Retrospective Preauthorizations

Effective August 1, 2013, PacificSource, through its Health Services department and processes, will review clinical documentation to ensure the appropriate claims adjudication for certain services that have been provided when coverage of this service was not preauthorized as contractually required. This includes requirements defined in both the member and provider contracts.

Retrospective review determinations will be based solely on the medical information available at the time the service was provided. Results from subsequent testing or procedures cannot be considered.

All retrospective requests for authorization are completed within 30 calendar days from receipt of all necessary clinical information.

Retrospective requests for authorization will only be honored when:

- The request is received within 60 days of the date of service, or
- Within 60 days of claims notification that an authorization is required.
- A genetic testing request through AIM is received within 60 days of the date of service only.

For diagnostic imaging and genetic testing, AIM will honor a 2-day grace period in cases where authorization is not requested prior to a service being rendered. For genetic testing, the grace period applies when the claim is more than two days old but within 60 days of the service date.

Requests received outside of this time frame will not be considered for retrospective review.

6.5 Medicaid Retroactive Approval Guidelines

Guideline Overview

Retroactive requests are allowed for services resulting from urgent/emergent situations. In cases where the patient’s condition was emergent and services were provided, the provider or facility is expected to contact PacificSource Community Solutions within two (2) business days for an authorization. Non-emergent services will not be considered for retroactive review for physical health, while 30 days is allowed for behavioral health services.

For the purposes of retroactive review, PacificSource Community Solutions defines “Emergent” as a medical condition manifesting itself by acute symptoms of sufficient severity such that a prudent layperson, with an average knowledge of health and medicine, could reasonably expect the absence of medical attention to result in:

- Serious jeopardy to the health of the individual or if pregnant, to the health of the woman or child
- Serious impairment of bodily functions
- Serious dysfunction of any bodily organ or part
Conditions for Retroactive Review

In order to be considered, the service must be determined to be medically necessary and appropriate.

Retroactive requests will be reviewed under the following conditions:

- Service is emergent and provider is unable to obtain preapproval from PacificSource Community Solutions.
- Hospital Admission is emergent and facility is unable to obtain preapproval from PacificSource Community Solutions despite timely attempts to do so. If a claim has already been processed for the service, an appeal must be submitted.
- It is the responsibility of the hospital (e.g., Utilization Review Department) to contact PacificSource Community Solutions with pertinent medical information, including a copy of the admission history, physical, etc.

Contact may be made via InTouch or faxed information. The request for retroactive review must be made within two (2) business days of provision of service.

Appeals

Please refer to Appeals Process section.

Emergency Room Usage

Emergency care is covered 24 hours a day, seven days a week. PacificSource Community Solutions is responsible for payment of emergency services. An emergency medical condition must have symptoms that are severe (including severe pain). The member must believe their health is in serious danger if they don’t get help immediately. This can include the health of their unborn child. The member’s symptoms MUST make them believe their health is in danger.

Members should NOT go to the Emergency Room for care that should take place in the provider’s office. Routine care for sore throats, colds, flu, toothaches, back pain, and tension headaches are NOT considered an emergency.

Observation Room Utilization

Preapprovals are not required for observation room stays. Observation room services are defined as:

A stay in a hospital facility for less than 48 hours not resulting in an inpatient admission, in which documentation of the patient’s condition clearly establishes the need for high level observation and monitoring by medical personnel.

6.6 Medicare Retroactive Authorization Guidelines

Conditions for Retroactive Authorization Review

In order to be considered for approval, the authorization must be determined to be medically necessary and appropriate.

Retroactive authorizations will be reviewed for approval under the following conditions:

- Service is urgent or emergent.
• Hospital Admission is emergent and facility is unable to obtain prior approval from PacificSource Medicare.
• The service was not provided more than 60 days preceding the request.
• The service under review has not been billed and denied. If the claim was denied, a formal appeal will need to be filed.
• Contact may be made via InTouch, telephone call, or faxed information.

Appeals
Please refer to the section on Provider Appeals.

Emergency Room Usage
Emergency Care is covered 24 hours a day, 7 days a week. PacificSource Medicare is responsible for payment of emergency services. An emergency medical condition must have symptoms that are severe (including severe pain). The member must believe their health is in serious danger if they don’t get help immediately. This can include the health of their unborn child. The member’s symptoms MUST make them believe their health is in danger.

Observation Room Stays
Authorization is not required for observation stays.

PacificSource Medicare follows CMS’s regulations for inpatient and observation stays.

Medicare Noncovered Service Waiver
Original Medicare established Advanced Beneficiary Notices (ABN) in order to allow a Medicare beneficiary the opportunity to determine if a medical service or procedure is covered by Medicare prior to receiving the service or procedure. However, per the Center for Medicaid and Medicare (CMS), Medicare Advantage plans are not permitted to allow their providers to issue this notice.

If a Medicare provider would like to provide a noncovered service or procedure to a Medicare Advantage member, CMS dictates that the provider must receive written consent before providing any services that are not a covered Medicare benefit.

If the service is not explicitly called out in the Evidence of Coverage (EOC) or other materials distributed to the member as noncovered, the provider must also utilize the pre-service organizational determination process of the plan to determine coverage if there is reasonable doubt the service is not covered.

If the plan determines, pre-service, that the item in question is not a covered benefit, the plan will issue an Integrated Denial Letter to the member and provider.

* This letter will include information about how the member can appeal the decision.

At this point, the provider can enter into an agreement with the member to provide the service or procedure, if the member would like to proceed, and pay the provider out of the member’s pocket. The agreement must follow specific guidelines:

• Only contracted providers are allowed to execute this agreement.
• The agreement cannot specify that it is an “Advanced Beneficiary Notice” or ABN
• The agreement must be made after the coverage determination and before the service is performed.
• The agreement must identify each noncovered CPT or HCPC code as well as specified pricing.

• After the provider receives the pre-service determination, and the member has signed the waiver and the service is provided, the provider will still bill PacificSource Medicare for the provided service(s).

* The –GA modifier must be attached to each noncovered CPT or HCPC line on the claim to indicate all guidelines have been followed. This modifier will allow for the noncovered item to be adjudicated as member liability.

How to request a Pre-service determination:

Pre-Service determinations may be requested by:

• Submitting the request through the online InTouch portal (Pharmacy and Medical requests).

• By faxing a request to the Plan (Medical requests only). The form and fax information can be found at Medicare.PacificSource.com by choosing the Provider Home Page and selecting the Documents and Forms link.

6.7 Utilization Management

PacificSource’s Utilization Review Program, administered by the Chief Medical Officer, entails two different types of utilization review: concurrent and retrospective.

We define utilization review as the “evaluation of medical necessity, appropriateness, and efficiency of the use of healthcare services, procedures, and facilities under the auspices of the applicable benefit plan.”

PacificSource Health Plans reserves the right to delegate a third party to assist with or perform the function of utilization management. PacificSource will have final authority in all utilization management decisions.

PacificSource may give a contractor or Dental Care Organization the ability to perform utilization management functions on its behalf, however, PacificSource retains responsibility for assuring the delegated functions are performed appropriately with consistent regulatory requirements and quality service. Compliance with PacificSource utilization management (UM) standards is assured through ongoing monitoring of the delegate’s performance.

Criteria may be requested prior to a utilization management (UM) decision, or in the event of a denial, from Health Services in any of the following ways per your request:

Phone:
Call Health Services to request a copy of the criteria at the following numbers per state:

Oregon and Washington: (541) 684-5584 Toll free: (888) 691-8209, ext. 2584
Idaho: (208) 333-1563 Toll free: (800) 688-5008
Montana: (406) 442-6595 Toll free: (877) 570-1563
TTY: 711

Mail:
PacificSource Health Plans/Health Services
110 International Way
Springfield, OR 97477

Email:
healthservices@pacificsource.com
Fax:
Oregon and Washington: (541) 225-3625
Idaho: (208) 333-1597
Montana: (406) 441-3378

Concurrent Review

Concurrent review begins when a hospital receives official inpatient admission authorization (see Commercial Retrospective Preauthorizations section). The health plan should be notified within 24 hours (business days only), but no later than 48 hours during normal business days and the next business day if the member is admitting during the weekend. Failure to notify health plan of admission will result in denial of service, and would be the responsibility of the provider.

Eligibility and benefits may be confirmed by contacting Customer Service and the admission should be reported to the Health Services department. Once notified, Health Services will provide a patient-specific, searchable reference number to the facility.

This number is the facility's confirmation that we have recorded the patient’s admission and that a PacificSource Clinical Case Manager will monitor and manage the patient's hospitalization.

Our Clinical Case Managers use nationally accepted, evidence-based screening criteria, clinical experience, and standardized processes to conduct all utilization review activities, including:

- American Society of Addiction Medicine Criteria
- PacificSource medical criteria and guidelines
- CMS Guidelines
- Standard of practice in your state
- MCG clinical guidelines

Utilization review reports are requested on a case-by-case basis and, if required, PacificSource will notify the case management or utilization review department the same day that a verbal or faxed review is needed. The frequency of concurrent review will vary based on the patient’s condition, case complexity, and practice guidelines. The review process may require medical records or review with the facility Case Manager or Social Worker. We also access EMR when available.

Our clinicians review the severity of illness and intensity of services provided during the hospital stay with the facility utilization review or case management staff to confirm need and appropriateness. Our Case Manager provides support to the member by coordinating services, equipment, or alternative placement, as indicated by the discharge plan and physician. Occasionally, the patient will wish to extend their hospitalization beyond that which the attending physician documents as medically necessary. In the case of member request, charges for hospital days and services beyond those determined to be medically necessary will be the patient’s responsibility. Only the PacificSource Medical Director or Chief Medical Officer can make decisions to not approve coverage for medical services for reasons of medical necessity.

If a determination is made that the patient no longer meets criteria for continued inpatient stay or the patient’s needs may be provided at a lower level of care (e.g., skilled nursing, palliative, or sub-acute setting), PacificSource will notify the facility and the attending physician by telephone, fax, or in writing within two business days of the initial request, and within three business days for ongoing requests. All parties are provided with notice of their appeal rights, and a 24-hour grace period may be allowed to coordinate care planning and services for patient discharge.

Charges for late discharge, outside of member’s request will not be the responsibility of the member, nor the health plan.
Retrospective Utilization

PacificSource reserves the right to retrospectively review any type of medical service. Requests for retrospective review of hospital admissions, for which we were not notified within two business days, may be reviewed at our discretion. Retrospective utilization may require review of the full medical records and may be reviewed by our Medical Director.

Quality Utilization Program

PacificSource’s Quality Utilization Program, administered by the Medical Director and the Health Services leadership team, provides a mechanism for systematic, coordinated, and continuous monitoring. The goal is to improve member health and the quality of services provided by the Health Services department.

6.8 Clinical Practice Guidelines

Clinical Practice Guidelines are recommendations for clinicians about the care of patients with specific conditions. They are based on the best available research evidence and practice experience. Guidelines are suggestions for care, not rules. However, most patients do fit guidelines and this should be reflected in overall practice patterns.

PacificSource adopts guidelines for diseases managed in the Condition Support program, relevant behavioral health conditions, preventive health guidelines for perinatal care through adults 65 years and older, as well as other guidelines relevant to the commercial population.

PacificSource adopted guidelines can be found by visiting the For Providers section of PacificSource.com or by contacting Health Services.

In health plans that include a prescription drug benefit, a comprehensive pharmacy services program is provided that includes drug list management, drug preauthorization, step therapy protocols, drug limitations, and a specialty drug program.

6.9 Commercial: Nonreimbursed Nursing Level Charges During an Acute Care Hospital Stay

Acute care hospital services are those items and services ordinarily furnished by the hospital for the care and treatment of a patient. These must be provided under the direction of a physician with privileges in an institution maintained primarily for treatment and care of patients with medical disorders. Hospital-based care is a key component of the continuum of health services. It provides necessary treatment for a disease or severe episode of illness for a short period of time. The goal is to discharge patients as soon as they are healthy and stable. Acute care hospital services and treatment provided in a hospital setting may include services such as:

- Medical or surgical services
- Room and board
- Observation services
- Nursing services
- Nutritional Services
- Occupational Therapy
- Physical Therapy
• Respiratory Therapy
• Speech Therapy
• Medical Social Services
• Intravenous (“IV”) injections or IV fluid administration/monitoring
• Intramuscular (“IM”) and/or subcutaneous (“SQ”) injections
• Nasogastric tube (“NGT”) insertion, and urinary catheter insertion
• Dressings, supplies, appliances, and equipment
• Diagnostic or Imaging services

Services That Are not Separately Reimbursable for In-network Facilities—Nursing Procedures
PacificSource Health Plan will not separately reimburse fees associated with nursing procedures or services including leveled nursing charges provided by facility nursing staff or unlicensed facility personnel (technicians) performed during an inpatient (“IP”) admission. Examples include, but are not limited to, intravenous (“IV”) injections or IV fluid administration/monitoring, intramuscular (“IM”) injections, subcutaneous (“SQ”) injections, nasogastric tube (“NGT”) insertion, and urinary catheter insertion, venipuncture or capillary blood draws.

6.10 Medicaid: Mental Health Services

Legacy Integrated Delivery System (IDS)
Behavioral and mental health benefits are administered by CareOregon. For specific details, please contact CareOregon.

Mental Health Assessment and Treatment Planning
All Medicaid members are entitled to a comprehensive mental health assessment. This assessment can be provided by the member’s local Community Mental Health Program (CMHP) or contracted PSCS panel provider. The completed assessment will be used to determine medical necessity for treatment, as well as make recommendations for the appropriate level of treatment, which may include: outpatient, individual therapy, group therapy, intensive services, psychiatric support and medication management. Members with complex needs, which require multiple services and/or extensive care coordination, are generally best served by the local CMHP.

Most of our members are assigned to Primary Care Clinics that now have integrated Behavioral Health Clinicians. Members are not required to get a referral from the PCP to see one of our specialty behavioral health panel providers, but these integrated Behavioral Health Clinicians can help members identify conditions, and coordinate with community behavioral health specialists.

Mental Health Crisis Services
Members in need of emergent and urgent mental healthcare can contact their local CMHPs to assess, stabilize, and determine the next steps to identify an appropriate level of care. All CMHPs have a specific crisis phone line that is available 24 hours a day, seven days a week.
Access to Psychiatric Services

Access to psychiatric consultation, stabilization, and medication management occurs through the local CMHP, contracted PSCS panel providers, and approved primary care clinics with behavioral health Integration. These services are available when they are determined medically necessary and part of a collaborative treatment plan, which includes outpatient therapy.

Billing processes for psychiatric medication prescribed to PacificSource Community Solutions members are as follows:

- Prescriptions for medications used to treat mental health diagnoses are billed by pharmacies directly to the Oregon Health Authority (not to PacificSource Community Solutions).
- Prescriptions written by a contracted mental health provider for medications, which are used in conjunction with mental health conditions, are covered by PacificSource Community Solutions.
- PCPs that provide medical management of PacificSource Community Solutions members’ mental health conditions (for example, somatic medicine, medication management) should bill PacificSource Community Solutions for reimbursement of these services.

Applied Behavioral Analysis Therapy

Applied Behavioral Analysis Therapy (ABA) is the designed implementation and evaluation of environmental modification to produce socially significant improvement in human behavior. Before an individual can be referred to ABA, they must be evaluated by a licensed psychologist, MD, or Psychiatric Mental Health Nurse Practitioner (recently added by OHA) who has experience or training in the diagnosis of Autism Spectrum Disorder. ABA is covered for the diagnosis of Stereotypic Movement Disorder with Self-Injurious Behavior due to a Neurological Dysfunction (DSM-5 307.3; ICD-10 F98.4) as well as Autism Spectrum Disorder. If the individual has not been evaluated by a licensed psychologist or MD, please speak with the member’s primary care provider regarding a referral, or contact PacificSource directly.

This table provides a list of Community Mental Health Programs (CMHP) by county.

<table>
<thead>
<tr>
<th>County</th>
<th>CMHP</th>
<th>Phone</th>
<th>Fax</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Columbia Gorge CCO</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Hood River</td>
<td>Mid-Columbia Center for Living</td>
<td>(541) 386-2620</td>
<td>(541) 296-2731</td>
</tr>
<tr>
<td></td>
<td>1610 Woods Court Hood River, OR 97031</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Crisis line: (541) 386-2620</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wasco</td>
<td>Mid-Columbia Center for Living</td>
<td>(541) 296-5452</td>
<td>(541) 296-2731</td>
</tr>
<tr>
<td></td>
<td>419 East 7th Street The Dalles, OR 97058</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Crisis line: (541) 296-5452</td>
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<td></td>
</tr>
<tr>
<td><strong>Central Oregon CCO</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Crook</td>
<td>BestCare Treatment Services</td>
<td>(541) 323-5330</td>
<td>(541) 447-6694</td>
</tr>
<tr>
<td></td>
<td>1103 NE Elms Street Prineville OR 97754</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Crisis line: (866) 638-7103</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deschutes</td>
<td>Deschutes County Behavioral Health</td>
<td>(541) 322-7500</td>
<td>(541) 322-7565</td>
</tr>
<tr>
<td></td>
<td>2577 NE Courtney Drive Bend, OR 97701</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Crisis line: (800) 875-7364</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jefferson</td>
<td>BestCare Treatment Services</td>
<td>(541) 475-6575</td>
<td>(541) 475-6196</td>
</tr>
<tr>
<td></td>
<td>125 SW C Street Madras, OR 97741</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Crisis line: (541) 475-6575</td>
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</tbody>
</table>
### County | CMHP | Phone | Fax
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**Lane CCO**

**Lane**

<table>
<thead>
<tr>
<th>Lane County Behavioral Health</th>
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<th></th>
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</thead>
<tbody>
<tr>
<td>151 W 7th Ave., Room 310</td>
<td>Lane County Behavioral Health</td>
<td>(541) 505-8426</td>
</tr>
<tr>
<td>Eugene, OR 97401</td>
<td>Lane County Behavioral Health</td>
<td>Open 24 hours a day, 7 days a week</td>
</tr>
<tr>
<td>Hourglass Community Crisis Center</td>
<td>(541) 505-8426</td>
<td>(541) 505-8426</td>
</tr>
<tr>
<td>71 Centennial Loop, Suite A, Eugene, OR 97401</td>
<td>71 Centennial Loop, Suite A, Eugene, OR 97401</td>
<td>71 Centennial Loop, Suite A, Eugene, OR 97401</td>
</tr>
<tr>
<td>Sacred Heart Medical Center, University District</td>
<td>(541) 686-7300</td>
<td>(541) 686-7300</td>
</tr>
<tr>
<td>1255 Hilyard Street Eugene, OR 97401</td>
<td>Sacred Heart Medical Center, University District</td>
<td>Sacred Heart Medical Center, University District</td>
</tr>
<tr>
<td>Sacred Heart Medical Center, Riverbend</td>
<td>(541) 222-730</td>
<td>(541) 222-730</td>
</tr>
<tr>
<td>3333 Riverbend Drive Springfield, OR 97477</td>
<td>3333 Riverbend Drive Springfield, OR 97477</td>
<td>3333 Riverbend Drive Springfield, OR 97477</td>
</tr>
<tr>
<td>The Child Center</td>
<td>(541) 682-4041</td>
<td>(541) 682-4041</td>
</tr>
<tr>
<td>3995 Marcola Rd. Springfield, OR 97477</td>
<td>The Child Center</td>
<td>The Child Center</td>
</tr>
<tr>
<td>White Bird Clinic</td>
<td>(541) 342-8255</td>
<td>(541) 342-8255</td>
</tr>
<tr>
<td>341 East 12th Eugene, OR 97501</td>
<td>341 East 12th Eugene, OR 97501</td>
<td>341 East 12th Eugene, OR 97501</td>
</tr>
<tr>
<td><strong>Marion/Polk CCO</strong></td>
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</tbody>
</table>

**Marion**

<table>
<thead>
<tr>
<th>Marion County Health Department</th>
<th>1118 Oak St. SE Salem, OR, 97301</th>
<th>(503) 585-4949</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polk County Health Department</td>
<td>1520 Plaza St NW #150, Salem, OR 97304</td>
<td>(503) 585-4965</td>
</tr>
<tr>
<td>(503) 585-4949</td>
<td>(503) 585-4965</td>
<td>(503) 585-4965</td>
</tr>
<tr>
<td>(503) 623-9289</td>
<td></td>
<td>(503) 623-9289</td>
</tr>
<tr>
<td><strong>6.11 Medicaid: Substance Use Disorder (SUD)</strong></td>
<td></td>
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</tr>
</tbody>
</table>

#### Outpatient Treatment

Outpatient SUD treatment services are available by accessing the member’s local Community Mental Health Program (CMHP) or a contracted PCS panel provider. Members are not required to get a referral from their PCP or a community mental health program to see one of our specialty behavioral health panel providers for outpatient SUD services.

#### Residential Treatment

Whenever possible, members are engaged in outpatient services prior to a referral to residential treatment. PacificSource Community Solutions works with Best Care Treatment Services and Rimrock Trails Adolescent Services as the primary residential treatment providers for members.
7. Pharmacy

7.1 Drug Lists/Formulary Coverage

PacificSource drug lists can vary by commercial plan and state, Medicaid, and Medicare lines of business. To find out which drug list applies to your patient’s pharmacy plan, check their PacificSource member ID card. If no “Drug List” is noted on a commercial member card, use the “PDL” list. Please use the drug lists to prescribe the most clinically appropriate and cost-effective medications for your patient.

Medicaid and Medicare Formulary Coverage

PacificSource Community Solutions PacificSource Medicare offer comprehensive prescription drug benefits with coverage in all therapeutic classes, as mandated by the Oregon Health Authority and Medicare Part D rules and regulations.

Medications that are covered under the pharmacy benefit can be found online by using our formulary. Coverage includes all therapy classes used to treat covered conditions.

Medications excluded from coverage for PacificSource Medicaid and Medicare members include, but are not limited to:

- Medications where the clinical circumstances do not meet the PacificSource Medicare clinical criteria.
- Medications not on the PacificSource Medicare formulary (also known as a List of Covered Drugs).
- If a generic drug is available, we will generally not cover a brand name drug.
- Medications that are used exclusively for indications that are excluded from coverage under the MAP Prioritized List of Health Services or Medicare Part D rules.
- Most over-the-counter (OTC) medications.
- Medications that have not gone through the FDA approval process, such as Less-than-Effective DESI drugs.
- Medicaid: Medications used to treat mental health conditions are not covered by PacificSource Community Solutions. Patients must access these medications directly through their Fee-For-Service benefit with the Oregon Health Authority.

PacificSource Community Solutions uses the following methods for utilization management:

- Limited Access (LA): Drug is available only at certain pharmacies and is limited to a 31-day supply.
- Partial Fill (PF): Some types of medications will be dispensed in a limited amount on the first fill only. This acts as a trial period to see if the member is able to tolerate the drug.
- Preapproval (PA): Medications that require preapproval will only be approved when medical record documentation proves the patients clinical circumstances meet the criteria established by our CQUM committee.
- Step Therapy (ST): Medications that require Step Therapy will only be approved when we have documentation that the member has tried and failed our preferred alternative medications or the member’s health would be jeopardized by trying our preferred alternative medications first.
- Quantity Limits (QL): Medications with quantity limits will generally be limited to the FDA approved dosing quantities.
PacificSource Medicare uses the following methods for utilization management:

- **Preapproval:** Medications that require preapproval will only be approved when medical record documentation proves the patient’s clinical circumstances meet the criteria established by our CQUM Committee and approved by the Center for Medicare and Medicaid Services (CMS).
- **Step Therapy:** Medications that require step therapy will only be approved when we have documentation that the member has tried and failed our preferred alternative medications or the member’s health would be jeopardized by trying our preferred alternative medications first.
- **Quantity Limits:** Medications with quantity limits will generally be limited to encourage dose optimization and limited to the FDA approved dosing quantities.

**Commercial, Medicare, and Medicaid: Using National Drug Codes**

The Centers for Medicare & Medicaid Services (CMS) deems that the use of NDC numbers is critical to correctly identify the drug and manufacturer in order to invoice and collect the rebates. The CMS requirement applies to Medicaid and Medicare/Medicaid dual members.

**Coverage Determinations and Exceptions**

PacificSource maintains a regional Pharmacy Services team. The Pharmacy team is available for clinical consultations with our clinical pharmacists, processing coverage determinations, benefit explanations, and issuing formulary exceptions.

PacificSource will provide retrospective notification for medication removed due to availability or safety. For all other formulary medication, PacificSource Medicare will provide member notification at least 60 days prior to implementing a change that may include, but is not limited to:

- Addition of a new coverage policy (PA, ST, QLL) to an existing medication
- Moving a medication to a less-favorable tier
- Removal of a previously listed drug
- Generic substitution

**To Request Coverage Determination (Preapproval/Prior Authorization) or Exception**

To request a coverage determination or an exception to our standard formulary coverage or utilization management rules, please contact the Pharmacy Services team using the InTouch for Providers online portal or by calling (888) 437-7728 toll-free. All PacificSource preapproval criteria, the applicable formulary, and our Pharmacy Preapproval Requests (Preauthorization Medication Request) form are available on our websites.

When a standard request for a drug benefit has been received, PacificSource provides notification of the determination to the member (and the prescribing physician when appropriate) as expeditiously as the member’s health condition requires, but no later than 72 hours after receipt of the request. This includes weekends and holidays. All standard determinations are communicated to the requesting prescriber by phone or fax and to members by letter.

If the clinical circumstances warrant an expedited review and the member’s health will be jeopardized by the standard review timelines, please indicate that the request is URGENT. All expedited requests will be processed 24 hours from receipt. All expedited determinations are communicated by phone to the member and via fax to the provider.
Pharmacy Network
PacificSource contracts with a Pharmacy Benefit Management Company to access a nationwide network of pharmacies. For a comprehensive list of in-network pharmacies please visit our websites.

Drug Preauthorization and Step Therapy Protocols
Certain drugs require preauthorization or step therapy for members with pharmacy or major medical prescription plans. This process includes an assessment of both your patient’s available benefits and medical indications for use. Be sure to preauthorize medication when required, to avoid your patient becoming responsible for the full cost of the medication.

We base our preauthorization and step therapy criteria on current medical evidence. We review and update them monthly to accommodate new drugs and changing recommendations. Our Quality Assurance, Utilization Management, Pharmacy and Therapeutics (QAUMPT) Committee must approve all criteria and formulary changes. The QAUMPT voting members consist entirely of providers and pharmacists from the communities we serve. Providers and members can access the current Preauthorization and Step Therapy Policies on our website at PacificSource.com/find-a-drug.

Requesting Preauthorization
The ordering physician or representative is required to contact our Pharmacy Services department for preauthorization. Pharmacy Services manages all drugs, whether covered by the pharmacy benefit or the medical benefit. Contact Pharmacy Services at (844) 877-4803, fax (541) 225-3665, or email pharmacy@pacificsource.com.

Electronic Prior Authorization
PacificSource Health Plans strongly encourages prior authorization (PA) and inpatient notification requests to be submitted via our provider portal, InTouch. We will contact your offices to assist you in getting an account created and assist with any training.

Medicaid: Prior Authorizations must be submitted via InTouch. If you do not have access to InTouch, please visit www.OneHealthPort.com and register. Here is a link with some more information about InTouch as well: https://pacificsource.com/providers/about-intouch-providers.

In some cases, your billing office may be using it already. If so, you can contact them to find out who your administrator is on the account, and they can contact OneHealthPort to have additional users added. This can include front desk personnel or anyone who needs to submit PAs.

Please contact your Provider Service Representative should you have any questions. We will be happy to assist you in any training you might need to utilize this portal.

Please include relevant chart notes and lab values in all requests for preauthorization.

Please note: A member’s contract (policy) determines benefits. Prescription drugs that are contract exclusions will not be preauthorized and will not be approved via notification to the pharmacy at the time of dispensing. Drugs that are not approved may be appealed through our Customer Service department.

Drug Limitations
Quantity limitations are in place for some drugs. These limit drugs to specific quantities over defined time periods. The drug limitations help manage utilization and drug costs, reduce overall healthcare costs, and provide sound, cost-effective options for the choice and utilization of effective drug therapies. It also helps to prevent Fraud, Waste & Abuse of medications.
The drugs on our lists will have a limit on the quantity allowed in a 30-day period, and we can only consider claims for this limited amount. Limiting quantities helps ensure that our members are using these products appropriately and in a safe manner according to the FDA-approved dosing guidelines.

If you feel that clinical indications warrant a quantity above the limit, please contact our Pharmacy Services department for preauthorization. Please be aware, although your patient may obtain more medication than the specific dispensing limit, they may be responsible for the cost of the additional quantity.

**Specialty Drugs**

CVS Caremark® Specialty Pharmacy Services is our exclusive provider for high-cost medications and biotech drugs. Caremark’s pharmacist-led Specialty Care Team provides quality, individual follow-up care and support to our members who are utilizing specialty medications. Please visit our drug list at PacificSource.com/find-a-drug to determine if a particular medication is considered specialty or not.

The Specialty Care Team provides comprehensive disease education and counseling, assesses patient health status, and offers a supportive environment for patient inquiries. Through our partnership with Caremark, we not only ensure that our members receive strong clinical support, but we also ensure the best drug pricing for these specific medications.

For more information, please contact Caremark at (800) 237-2767 or fax (800) 323-2445.

**Nonformulary Requests**

If your patient has tried all formulary drugs available and requires a nonformulary drug, you may request preauthorization through the same process outlined above. If you would like to suggest an addition to the formulary, please mail your written request to:

PacificSource Health Plans  
Attn: Pharmacy Services PO Box 7068  
Springfield, OR 97475-0068

The PacificSource Quality Assurance, Utilization Management, Pharmacy & Therapeutics (QAUMPT) Committee considers requests at their monthly meetings. Once we receive your request, we will notify you of the date your request will be reviewed. After the review, we will notify you of the Committee’s decision. There is no guarantee that any change will be made to the drug list.
8. Products

8.1 Product Descriptions

All PacificSource products are designed to contain healthcare costs appropriately. By providing a full spectrum of products, PacificSource is able to offer a broad range of plans with varying flexibility.

8.1.1 Commercial

<table>
<thead>
<tr>
<th>Product Line</th>
<th>Description</th>
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<tbody>
<tr>
<td>Voyager</td>
<td>PPO plans; plan designs include copay-style or high-deductible health plan-style, which may be paired with a health savings account (HSA)</td>
</tr>
<tr>
<td>Navigator</td>
<td>Coordinated care organization style of plans; plans include deductibles with copays on some plans; some plans can be paired with a HSA</td>
</tr>
<tr>
<td>Pathfinder</td>
<td>Coordinated care organization style of plans; plans include deductibles with copays on some plans; some plans can be paired with a HSA</td>
</tr>
<tr>
<td>PacificSource Network</td>
<td>PSN</td>
</tr>
<tr>
<td>SmartChoice</td>
<td>SCN</td>
</tr>
<tr>
<td>SmartHealth</td>
<td>SHN</td>
</tr>
<tr>
<td>SmartAlliance</td>
<td>SAN</td>
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<tr>
<td>BrightPath</td>
<td>BPN</td>
</tr>
<tr>
<td>Legacy</td>
<td>LHN</td>
</tr>
<tr>
<td>Standard plans</td>
<td>Benefits for Standard plans are designed by the state of Oregon.</td>
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Availability

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<tr>
<td>Voyager</td>
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<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Navigator</td>
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<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Pathfinder</td>
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</tr>
<tr>
<td>PacificSource Network</td>
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<tr>
<td>SmartChoice</td>
<td>SCN</td>
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</tr>
<tr>
<td>SmartHealth</td>
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<tr>
<td>SmartAlliance</td>
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<td>BrightPath</td>
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<tr>
<td>Legacy</td>
<td>LHN</td>
<td>–</td>
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</table>

Note: Plans and networks may change every year. Please see PacificSource.com for current information.
For more information regarding benefits and eligibility, please contact Customer Service:

**Oregon:** (541) 684-5582 or toll-free (888) 977-9299

**Idaho:** (208) 333-1596 or toll-free (800) 688-5008

**Montana:** (406) 442-6589 or toll-free (877) 590-1596

**Washington:** (866) 556-1224

**Email:** cs@pacificsource.com

For plan-specific in-network provider directories, please contact our Sales department by phone at (541) 686-1242 or (800) 624-6052, or visit our website at [PacificSource.com](http://PacificSource.com).

### 8.1.2 PacificSource Coordinated Care Organization (Medicaid)

PacificSource Community Solutions has four CCO’s: Central Oregon, the Columbia Gorge, Lane County, and Marion-Polk.

**Central Oregon CCO** includes Deschutes, Crook, Jefferson, and Northern Klamath* counties.

**Columbia Gorge CCO** includes Hood River and Wasco counties.

**Lane County CCO** includes Lane County

**Marion-Polk CCO** includes Marion and Polk counties

*Zip codes include 97731, 97733, 97737, and 97739

### 8.1.3 PacificSource Medicare Products

All PacificSource Medicare products are designed to contain healthcare costs appropriately. By providing a full spectrum of products, PacificSource Medicare is able to offer a broad range of plans with varying flexibility.

For more information regarding benefits and eligibility, or please call our Customer Service department toll-free at (888) 863-3637, or email at MedicareCS@pacificsource.com.

For plan-specific in-network provider directories, please call our Customer Service department toll-free at (888) 863-3637, email at MedicareCS@pacificsource.com, or visit our website at [Medicare.PacificSource.com](http://Medicare.PacificSource.com).

### 8.2 Plan Features

#### 8.2.1 Commercial Medical Plan Features

**Chiropractic or Acupuncture Care**

An alternative care benefit, chiropractic manipulation benefit, or alternative care/chiropractic combined benefit is built into some of our plan designs, while this benefit must be added by endorsement to other plan designs. When benefits apply, the copayment, coinsurance, and/or deductible may differ between plans. Some services may apply to the outpatient rehabilitation visit limits. For specific benefits, please call our Customer Service department at (541) 684-5582 or toll-free at (888) 977-9299. Alternatively, you may call our toll-free customer service phone line especially for commercial providers at (855) 896-5208 to verify member benefits.
Vision

With PacificSource’s vision services network, members may choose from a broad panel of in-network physicians and providers throughout our service area, including ophthalmologists, optometrists, and dispensing opticians.

Vision benefits are built into some of our plan designs, while this benefit must be added by endorsement to other plan designs. A variety of vision benefit packages are available as endorsements to our large group health plans. Identification cards are flagged with the symbols +, *, or Y to indicate the type of plan. For specific vision benefits, please call our Customer Service department at (541) 684-5582 or toll-free at (888) 977-9299. Alternatively, you may call our toll-free customer service phone line especially for commercial providers at (855) 896-5208 to verify member benefits.

Prenatal Program

PacificSource Health Plans offers the Prenatal program for its pregnant members. The program focuses primarily on reduction of prenatal risk factors through education and early intervention. PacificSource hopes to have a positive effect on both patient health and healthcare costs by decreasing the incidence and severity of low birth weight infant cases. The components of the program are as follows:

- Educational materials
- Risk assessments including depression screening
- Registered Nurse Consultant (available Monday–Friday, 8:00 a.m.–5:00 p.m. PST)

The goals of the program are to:

- Encourage pregnant women to practice good prenatal care
- Help identify individuals who may be at risk for complications

Prenatal Vitamin Program

PacificSource Health Plans offers its pregnant members nine months of prenatal vitamin supplements at no cost (limitations apply). We offer this benefit to pregnant members to promote healthy fetal development and optimize healthy baby outcomes.

There are two prescription prenatal vitamins offered under the program.

To enroll a patient in the prenatal vitamin program, complete the Prenatal Vitamin Home Delivery Order Form found on our web site PacificSource.com. Fax the completed form to (866) 624-5797.

Direct questions about the program to our Customer Service team, (541) 684-5582 or toll-free (888) 977-9299.

Condition Support Program

Our Condition Support Program is available to all commercial members with medical coverage.

Members with asthma or diabetes (including members ages 6–18), heart failure, chronic obstructive pulmonary disease, or coronary artery disease may be referred to the program.

The program’s interventions are supported by national clinical guidelines and promote a collaborative relationship between the physician and the patient.

Nurses educate and support recognition and understanding of symptoms, when to seek medical treatment, encourage and support adoption of healthy lifestyle choices utilizing motivational interviewing
and health coaching techniques, as well as adherence to the physician-prescribed treatment plan and medication regimen. Condition specific information and quarterly newsletters are mailed or emailed.

Some participants in the program receive outbound nurse phone contacts. Your patient may opt-out of the program by phone or email.

Physician collaboration with a Condition Support Registered Nurse regarding your plan of care is encouraged and welcomed so that the program may support the goals you have set with your patient.

If you have any questions about the Condition Support Program, would like to contribute input on your patient’s plan of care, or would like to receive any of the program materials, please contact our Health Services department at toll-free at (888) 987-5805 or by email at yoursupport@pacificsource.com.

**AccordantCare® Rare Disease Management Program**

As an added support to patients with certain chronic, progressive diseases, PacificSource partners with the AccordantCare® Rare Disease Management Program. Accordant Health Services provides support service to patients with the following conditions:

- Seizure disorders
- Rheumatoid arthritis
- Dermatomyositis
- Gaucher disease
- Multiple sclerosis
- Myasthenia gravis
- Parkinson’s disease
- Sickle cell disease
- Cystic fibrosis
- Hemophilia
- Scleroderma
- Polymyositis
- Amyotrophic lateral sclerosis (ALS)
- Systemic lupus erythematosus (SLE)
- Chronic inflammatory demyelinating polyneuropathy (CIDP)

Patients in the AccordantCare® Program receive 24-hour support from a team of healthcare professionals specializing in complex, chronic conditions. They also have access to resources at Accordant.com, preventive monitoring, health evaluations, and nurse outreach.

**CaféWell**

CaféWell, powered by Welltok, is a secure health engagement portal that offers patients a highly personalized, engaging, and collaborative experience to help individuals reach their health and wellness goals, and be rewarded for making healthy life choices.

- CaféWell offers your patients:
  - Custom, personalized health goals
• Communities of health experts, family, and friends
• Helpful tips and articles on health and wellness
• Condition management programs
• Great rewards

Patients can access CaféWell via the PacificSource website. They must first register for InTouch to access the tool. Non-PacificSource members can also access Welltok. More information is available at PacificSource.com/cafewell.

Health Education Classes
Patients can participate in local health education classes and receive reimbursement up to $150 per plan year for eligible health and wellness classes (some limitations apply). We hope that you’ll refer your patients to useful classes in your area. Learn more at PacificSource.com/members/individuals/healthy-resources/health-education-reimbursement.

Prescription Discount Program
This value-added program is offered to members at no cost. It allows members to access discounted drug prices through the Caremark pharmacy network by showing their PacificSource ID card. The discount is available on all IRS Section 125-eligible medications, including those excluded from coverage under the health plan.

If there’s no prescription drug endorsement in place, the program helps members save money on all their prescription purchases. For members with a PacificSource pharmacy benefit, the discount “wraps around” the health plan’s prescription benefits.

Members will receive the discount when they purchase medications that aren’t covered by the health plan, such as drugs for smoking cessation or infertility.

The discount program cannot be used in conjunction with an insurance benefit or other prescription discount program. For example, they won’t receive an additional discount with this program. However, if they are purchasing drugs that aren’t covered by the other insurance benefit, they may be able to use this prescription discount program to save money on those medications.

Chronic Disease Self-management Program
Developed by Stanford Patient Education Research Center, the six-week Chronic Disease Self-Management Program is designed to teach those with chronic diseases how to better manage their condition and live healthier lives. Classes help build patients’ skills and confidence through weekly action planning and feedback, modeling of behaviors, group problem solving, and introduction of management techniques. Topics included:

• Techniques to deal with problems such as frustration, fatigue, pain, and isolation
• Appropriate exercise for maintaining and improving strength, flexibility, and endurance
• Communicating effectively with family, friends, and health professionals
• Nutrition
• How to evaluate new treatments

The program does not conflict with other programs or the individual’s specific treatment plan. In fact, it enhances patient compliance with treatment regimens and can strengthen disease-specific education...
processes. For people with more than one chronic condition, this program teaches skills to coordinate the
details necessary to manage their health and stay active.

For PacificSource members, the CDSM program cost will be reimbursed up to $25. The cost of the
required text, Living a Healthy Life with Chronic Conditions, is not reimbursable.

If you have patients you think would benefit from this program, please share this information with them.
Contact our Health Management Team at (888) 987-5805 or yoursupport@pacificsource.com.

Tobacco Cessation Program

We understand the difficulty of quitting tobacco and are pleased to offer our members the Quit
for Life® Program.

The Quit For Life Program, developed by Alere Wellbeing and the American Cancer Society, is a six-month
program that consists of phone-based, one-on-one treatment sessions with a professional Quit Coach®.
During the initial call, which typically takes 25–30 minutes, the Quit Coach will review your patient’s
tobacco use history and help them develop a personalized quit plan. If they are not quite ready to quit,
the Quit Coach will work with them to get closer to making that decision. Quit For Life’s toll-free number
offers additional support between scheduled calls.

This benefit is offered to all PacificSource members with medical coverage. There is no charge to
participate in the program, and PacificSource covers unlimited quit attempts.

When participants enroll in the Quit for Life Program, they receive:

- One-on-one phone-based sessions.
- Unlimited toll-free telephone access to the Quit Coaches while enrolled in the program.
- Membership to Web Coach, where they can build their own Quitting Plan, track progress, and
  interact with other participants and Quit Coaches.
- Recommended nicotine replacement products, such as an eight-week supply of nicotine patches
  or gum (sent directly to you from the program), or the medications bupropion, bupropion SR, or
  Chantix (when prescribed by their doctor).
- A Quit Kit of materials designed to help them stay on track.

Members are not required to see their doctor to enroll. Doctor visits for tobacco cessation may or may
not be covered under a member’s plan. Please call Customer Service to verify the benefit. To enroll,
they simply call Quit For Life toll-free at (866) QUIT-4-LIFE (784- 8454) or enroll online at quitnow.net.
After enrolling, everything needed to participate is sent directly to the member’s home. A Quit Coach is
available 24 hours a day, seven days a week.

If you or your patient has questions about their coverage or Quit for Life, you are welcome to contact
our Customer Service department at (541) 684-5582, or toll-free at (888) 977-9299, or email us at
cs@pacificsource.com.

The Quit For Life® Program is brought to you by the American Cancer Society® and Alere Wellbeing.

The two organizations have 35 years of combined experience in tobacco cessation coaching and have
helped more than one million tobacco users. Together they will help millions more make a plan to quit,
realizing the American Cancer Society’s mission to save lives and create a world with more birthdays.
Global Emergency Services

If a PacificSource member experiences a medical emergency when traveling abroad or 100 miles or more away from their primary residence, Assist America Global Emergency Services can help. Assist America provides a variety of services, including:

- Medical consultation and evaluation
- Medical referrals
- Critical care monitoring
- Evacuation to the nearest facility that can appropriately treat your situation if medically necessary

When the member is ready to be discharged from a hospital and needs assistance to return home (or to a rehabilitation facility), Assist America will arrange transportation and provide an escort, if necessary.

Services arranged by Assist America are provided at no cost to our members. Once under the care of a physician or medical facility, their PacificSource coverage applies.

8.2.2 Medicaid Medical Plan Features

The following value-added services are available to PacificSource Community Solutions members at no additional cost:

**Non-Emergent Medical Transport (NEMT)**

NEMT is how members can get a ride to a covered healthcare appointment. This is for scheduled healthcare appointments, not emergencies.

There are many ways we can help members get to their appointment depending on their needs. Examples are:

- Bus pass or taxi service
- A ride from a volunteer driver
- Wheelchair-accessible vehicle service
- Stretcher vehicle or non-emergent ambulance
- Reimbursement for driving themselves (if they tell us before the appointment).

Please note, some rules may apply.

**Who can get a ride?**

Members are eligible for a free ride to their covered appointment if:

- They are on the Oregon Health Plan and enrolled in a PacificSource CCO.
- Their appointment is for something that the Oregon Health Plan pays for.

Children ages 12 and under must travel with a parent or guardian who is at least 18 years old.

**When to call?**

The member should call as soon as they schedule their medical appointment. PacificSource has contracts with the following NEMT brokerages:
Central Oregon, Columbia Gorge, and Marion/Polk Regions
LogistiCare Solutions

Central Oregon Region:
Reservation (855) 397-3619
Ride Assist (855) 397-3620

Columbia Gorge Region:
Reservation (855) 397-3617
Ride Assist (855) 397-3618

Marion/Polk Region:
Reservation (844) 544-1397
Ride Assist (844) 544-1398

Facility: (844) 287-6698
Facility Fax: (855) 882-5627
TTY: 711
Hours: 9:00 a.m. – 5:00 p.m., Monday – Friday.

Lane County Region
Lane Transit District RideSource
Local: (541) 682-5566
Toll Free: (877) 800-9899
TTY: 711
Hours: 8:00 a.m. – 5:00 p.m., Monday – Friday

Legacy Health IDS Providers will need to contact HealthShare of Oregon for details around NEMT services. For contact information please visit CommunitySolutions.PacificSource.com/HealthShare.

Living Well with Chronic Conditions

Living Well with Chronic Conditions (the Chronic Disease Self-Management Program, or CDSMP) is a six-week workshop that provides tools for living a healthy life with chronic health conditions, including diabetes, arthritis, asthma, and heart disease. Through weekly sessions, the workshop provides support for continuing normal daily activities and dealing with the emotions that chronic conditions may bring about.

Childhood Immunization Schedule

The schedules list the age or age range when each vaccine or series of shots is recommended. If the child (birth through six years old) or adolescent (age seven through 18 years old) has missed any shots, members can consult the catch-up schedule AND check with their doctor about getting back on track.

Quit For Life® Program

The Quit For Life® Program is the nation’s top stop smoking program. It can help members beat their need for tobacco for good. The program uses a mix of tools including telephone and website coaching, and a quit tobacco plan.

Expert coaches help members learn skills and give them tools to quit tobacco for life. The program uses a four-step plan. The chance of quitting is eight times more than if a person tries to quit cold turkey. The program is free, confidential, and it works.

Call (866) QUIT-4-LIFE, toll-free (866) 784-8454, or log on toQuitNow.net for details or to enroll. TTY users should call (877) 777-6534.
Community Assisters
Members can get help filling out a new enrollment application or with renewal paperwork by working with a community assister. Members can find an assister near them by going to the Enrollment Information section of our website, or by calling OHP Customer Service at (800) 699-9075. TTY users should call 711. Someone is there to help you Monday through Friday, from 7:00 a.m. to 6:00 p.m.

8.2.3 Medicare Medical Plan Features

Preventive Care
PacificSource Medicare members have a $0 copay for all preventive care received at an in-network provider, including:

- Bone mass screening and diagnostic ($0 copay)
- Colorectal screening and diagnostic ($0 copay)
- Mammograms ($0 copay)
- Pap and pelvic exams ($0 copay)
- Prostate cancer screenings ($0 copay)
- And more

Extra Benefits
PacificSource Medicare plans cover services that Original Medicare does not cover.

- Annual routine physicals ($0 copay with in-network providers)
- Routine vision exams ($15 copay on Essentials Rx 803, copays vary by plan)
- Routine hearing exams ($45 copay for in-network providers)
- Eyeglasses and contacts—$200 reimbursement every two calendar years
- 24-Hour NurseLine
- Home fitness kit ($0 per kit)
- Silver&Fit® Exercise & Healthy Aging Program ($0/year fee)
- TruHearing® hearing aids ($699/$999 copay per aid)

Worldwide Coverage for Travelers
Offered on all plans. PacificSource Medicare members are covered during travel anywhere in the U.S. and worldwide for:

- Urgent care (copay varies by plan)
- Emergency room (copay varies by plan)
- Ambulance: ground or air (copay varies by plan)

Other Plan Features
Health Risk Assessments, Health Fairs, Events, and Immunization Programs
We provide health screenings, educational events, immunization programs and health risk assessments, as well as education information about health, wellness, and chronic conditions.
**Medication Therapy Management (MTM) Program**
Eligible members receive free one-on-one consultations with our contracted clinical pharmacists who identify drug safety issues, potential drug interactions, cost-saving opportunities, and other therapy changes that can improve member health. A clinical pharmacist will work with the member’s doctor to make sure they are getting the most out of their prescription drug benefit.

**Reminder Program**
We want our members to maintain good health and improve it. We believe prevention is the best offense. Screening can catch chronic disease early so treatment can give the best chance to avoid complications. We also want to catch complications early so they do not get worse. For example, by catching cancer early, less treatment may be needed and there is a better chance for cure. An annual visit with their doctor is very important to maintaining good health. Members will receive reminders for important medical appointments by phone or by mail from our Health Services team.
9. **Members**

9.1 **Enrollment**

9.1.1 **Commercial Enrollment**

All members enrolled in plans requiring the selection of a primary care practitioner (PCP) must make a selection at the time of enrollment. PCPs are chosen from the primary care practitioner section of the provider directory associated with the group plan. Each family member must select a PCP that will be responsible for managing that member’s healthcare. Family members may choose the same or different PCPs.

Completed enrollment forms are forwarded to PacificSource. When applications are processed, identification cards are sent to the member. PCP selections become active on the effective date of the coverage.

If the member has not chosen a PCP at enrollment and is issued an identification card, the ID card will say “CALL PACIFICSOURCE.” In plans where PCPs and referrals are required, no benefits will be available to the member until a PCP selection is made.

9.1.2 **Medicaid Enrollment**

When a person enrolls in the Oregon Health Plan (OHP), they are automatically assigned to the Coordinated Care Organization (CCO) responsible for the county in which they live.

Once an OHP enrollee is assigned to PacificSource Community Solutions, they will receive a member welcome packet, which will include information such as their new member ID card and a copy of the member handbook. A member is auto assigned to a primary care provider (PCP) when they enroll on the CCO.

A member is auto assigned to a primary care provider (PCP) when they enroll on the CCO. Members may change their PCP or dental care organization at any time by completing the PCP Change Form or by contacting PacificSource Community Solutions Customer Service. The form can be found on our website at CommunitySolutions.PacificSource.com/Member. Contact phone numbers are listed in the Who to Contact section.

9.1.3 **Medicare Advantage Enrollment**

There are specific times when members can sign up for Medicare Advantage (Part C) and Medicare prescription drug coverage (Part D), or make changes to the coverage they already have. General rules for enrollment:

- When first eligible for Medicare or when you turn 65, during your Initial Enrollment Period
  - The seven-month period that starts three months before the month a person turns 65, includes the month a person turns 65, and ends three months after the month the person turns 65
  - The seven-month period that starts three months before a person’s 25th month of disability and ends three months after the 25th month of a person’s disability
- During the annual open enrollment period from November 15 through December 7 each year. During this time, members have the opportunity to move or change their Medicare plan.
- Under certain circumstances that qualify you for a Special Enrollment Period (SEP), such as:
  - A change of residence that is outside current plan service area
- Member becomes eligible for Medicaid
- Member qualifies for Extra Help with Medicare prescription drug costs
- Member getting care in an institution, such as a skilled nursing facility or long-term care hospital

9.2 Member ID Card

Every PacificSource member is either issued a member identification card or has access to the card information through our app, myPacificSource. Identification cards contain information necessary for claims submission (please see examples). If you have questions about a specific member’s benefits or eligibility, please contact Customer Service. Accordingly, verification of eligibility is not a guarantee of coverage.

Legacy Integrated Delivery System (IDS) member ID cards are supplied by HealthShare.

Please ask your patient for their PacificSource member ID card at the time of service. ID cards may include the following important information:

- Member’s name
- Member numbers
- Group name and number (commercial members)
- Network name: The type of network is located below the member number. If a referral is required for the plan, the words “Referral Required” will be seen here.
- Primary care provider’s name
- Effective dates
- Coverage (medical, vision, and/or dental)
- Pharmacy information and pharmacy identification numbers. If no “Drug List” is noted on their card, use our “PDL” list. Our drug lists are available online at PacificSource.com/find-a-drug.
- Contact information
- Electronic payor ID number
- Out-of-Area Network information: For members residing or accessing care outside the PacificSource service area*
- Provider partners

Members are not required to make payment for services up-front to in-network providers, except for any applicable copayments, coinsurance, deductibles, or noncovered services.

We encourage physicians and providers to request to see members’ ID cards each time services are accessed. This will help convey to members the importance of the ID card in supplying needed information for proper administration of their benefits and subsequent claims.
9.3 Rights and Responsibilities

PacificSource will provide our customers with the highest level of service in the industry. This level of service will be measurable and documented.

PacificSource Health Plans Statement of Principles

In keeping with our commitment to provide the highest quality healthcare service to our members, PacificSource Health Plans acknowledges the importance of accountability and cooperation. We have ensured a relationship of mutual respect among our members, practitioners, and the health plan by the creation of a partnership of the three parties. Recognition of certain rights and responsibilities of each of the partners is fundamental to this partnership.

9.3.1 Commercial Member Rights and Responsibilities

PacificSource Health Plans assures our members of the following:

• Members have a right to receive information about PacificSource, our services, our providers, and their rights and responsibilities.
• Members have a right to expect clear explanations of their plan benefits and exclusions.
• Members have a right to be treated with respect and dignity.
• Members have a right to impartial access to healthcare without regard to race, religion, gender, national origin, or disability.
• Members have a right to honest discussion of appropriate or medically necessary treatment options. Members are entitled to discuss those options regardless of how much the treatment costs or if it is covered by their plan.
• Members have a right to the confidential protection of their medical records and personal information.
• Members have a right to voice complaints about PacificSource or the care they receive, and to appeal decisions they believe are wrong.
• Members have a right to participate with their healthcare provider in decision-making regarding their care.
• Members have a right to know why any tests, procedures, or treatments are performed and any risks involved.
• Members have a right to refuse treatment and be informed of any possible medical consequences.
• Members have a right to refuse to sign any consent form they do not fully understand, or cross out any part they do not want applied to their care.
• Members have a right to change their mind about treatment they previously agreed to.
• Members have a right to make recommendations regarding PacificSource Health Plans’ member rights and responsibility policy.

As partners with PacificSource, members are responsible for:

• Reading their policy or handbook and all other communications from PacificSource, and for understanding their policy’s benefits. Members are responsible for contacting PacificSource Customer Service if anything is unclear to them.
• Making sure their provider obtains benefit verification for any services that require it before they are treated.
• Providing PacificSource with all the information required to provide benefits under their plan.
• Giving their healthcare provider complete health information to help accurately diagnose and treat them.
• Telling their providers they are covered by PacificSource and showing their ID card when receiving care.
• Being on time for appointments, and calling their provider ahead of time if they need to cancel.
• Any fees the provider charges for late cancellations or “no shows.”
• Contacting PacificSource if they believe they are not receiving adequate care.
• Supplying information to the extent possible that PacificSource needs to administer their benefits or their provider needs in order to provide care.
• Following the plans or instructions for care that the member has agreed to with their doctors.
• Understanding their health problems and participating in developing mutually agreed upon goals, to the degree possible.

9.3.2 PacificSource Community Solutions Member Rights

• To be treated with dignity and respect.
• To be treated by in-network providers the same as other people seeking healthcare benefits to which they are entitled, and to be encouraged to work with the member’s care team, including providers and community resources appropriate to the member’s needs.
• To choose a primary care physician (PCP) or service site, and to change those choices as permitted in the CCO’s administrative policies.
• To refer oneself directly to mental health, chemical dependency, or family planning services without getting a referral from a PCP or other in-network provider.
• To have a friend, family member, or advocate present during appointments and at other times as needed within clinical guidelines.
• To be actively involved in the development of his/her treatment plan.
• To be given information about his/her condition and covered and noncovered services to allow an informed decision about proposed treatment.
• To consent to treatment or refuse services, and be told the consequences of that decision, except for court ordered services.
• To receive written materials describing rights, responsibilities, benefits available, how to access services, and what to do in an emergency.
• To have written materials explained in a manner that is understandable to the MAP member and be educated about the coordinated care approach being used in the community and how to navigate the coordinated healthcare system.
• Receive culturally and linguistically appropriate services and support, in locations as geographically close to where members reside or seek services as possible, and choice of providers within the delivery system network that are, if available, offered in nontraditional settings that are accessible to families, diverse communities, and underserved populations.
• Receive oversight, care coordination and transition and planning management from their CCO within the targeted population of AMH to ensure culturally and linguistically appropriate community-based care is provided in a way that serves them in as natural and integrated an environment as possible and that minimizes the use of institutional care.
• To receive necessary and reasonable services to diagnose the presenting condition.
• To receive integrated person centered care and services designed to provide choice independence and dignity and that meet generally accepted standards of practice and are medically appropriate.

• To have consistent and stable relationship with a care team that is responsible for comprehensive care management.

• To receive assistance in navigating the healthcare delivery system and in accessing community and social support services and statewide resources including but not limited to the use of certified healthcare interpreters, and advocates, community health workers, peer wellness specialists and personal health navigators who are part of the member’s care team to provide cultural and linguistic assistance appropriate to the member’s need to access appropriate services and participate in presses affecting the member’s care and services.

• To obtain covered preventive services.

• To have access to urgent and emergency services 24 hours a day, seven days a week without preapproval.

• To receive a referral to specialty practitioners for medically appropriate covered coordinated care services.

• To have a clinical record maintained which documents conditions, services received, and referrals made.

• To execute a statement of wishes for treatment, including the right to accept or refuse medical, dental, surgical, chemical dependency, or mental health treatment and the right to execute directives and powers of attorney for healthcare established under ORS 127 as amended by the Oregon Legislative Assembly 1993 and the OBRA 1990 – Patient Self-Determination Act.

• To receive written notices before a denial of, or change in, a benefit or service level is made, unless such notice is not required by federal or state regulations.

• To be able to make a complaint or appeal with the CCO and receive a response.

• To request a contested case hearing.

• To receive qualified healthcare interpreter services free of charge.

• To receive a notice of an appointment cancellation in a timely manner.

• To receive a second opinion from a qualified healthcare professional within the provider network, or have the health plan arrange for the member to obtain a qualified healthcare professional from outside the provider network, at no cost to the member.

• To report a complaint of discrimination by contacting the health plan, OHA, the Bureau of Labor and Industries (BOLI) or the Office of Civil Rights (OCR).

• To receive notice of the plan’s nondiscrimination policy and process to report a complaint of discrimination on the basis of race, color, national origin, religion, sex, sexual orientation, marital status, age, or disability in accordance with all applicable laws including Title VI of the Civil Rights Act and ORS Chapter 659A.

• To receive equal access for both males and females under 18 years of age to appropriate facilities, services and treatment under this contract, consistent with OHA obligations under ORS 417.270.

• To be free from any form of restraint or seclusion used as a means of coercion, discipline, convenience, or retaliations specified in federal regulations on the use of restraints and seclusion.

• To only be responsible for cost sharing authorized under the contract in accordance with 42 CFR 447.50 through 42 CFR 447.60 and with the General Rules.

• To utilize electronic methods of communications upon request and if available.
Behavioral Health Rights

Any member receiving behavioral health services has the following rights in addition to those listed above:

- To be treated with dignity and respect.
- To have all services explained, including expected outcomes and possible risks.
- To confidentiality, and the right to consent to disclosure.
- To view your Individual service record.
- To refuse participation in experimentation.
- To receive medication specific to your diagnosed clinical needs.
- To receive prior notice of transfer, unless the circumstances necessitating transfer pose a threat to health and safety.
- To be free from abuse or neglect and to report any incident of abuse or neglect without being subject to retaliation.
- To have religious freedom.
- To be free from isolation and restraint, except as regulated in OAR 309-032-1540(9).
- To be informed at the start of services, and periodically thereafter, of the rights guaranteed by this rule.
- To be informed of the policies and procedures, service agreements and fees applicable to the services provided, and to have a custodial parent, guardian, or representative, assist with understanding any information presented.
- To have family and guardian involvement in service planning and delivery.
- To make a declaration for mental health treatment, when legally an adult.
- To file grievances, including appealing decisions resulting from the grievance.
- To exercise all rights set forth in ORS 109.610 through 109.697 if the individual is a child, as defined by these rules.
- To exercise all rights set forth in ORS 426.385 if the individual is committed to the Authority.
- To have all rights described in this section without any form of retaliation or punishment.

Residential Services Rights

In addition to the rights listed above, every individual receiving residential services has the following rights:

- To a safe, secure, and sanitary living environment.
- To a humane service environment that has reasonable protection from harm, reasonable privacy, and daily access to fresh air and the outdoors.
- To keep and use personal clothing and belongings.
- To have an adequate amount of private, secure storage space.
- To express sexual orientation, gender identity and gender presentation.
- To have access to and participate in social, religious, and community activities.
- To private and uncensored communications by mail, telephone, and visitation, subject to the following restrictions:
This right may be restricted only if the provider documents in the individual’s record that there is a court order to the contrary, or that in the absence of this restriction, significant physical or clinical harm will result to the individual or others. The nature of the harm must be specified in reasonable detail, and any restriction of the right to communicate must be no broader than necessary to prevent this harm.

The individual and his or her guardian, if applicable, must be given specific written notice of each restriction of the individual’s right to private and uncensored communication. The provider must ensure that correspondence can be conveniently received and mailed, that telephones are reasonably accessible and allow for confidential communication, and that space is available for visits. Reasonable times for the use of telephones and visits may be established in writing by the provider.

- To communicate privately with public or private rights protection programs or rights advocates, clergy, and legal or medical professionals.
- To have access to and receive available and applicable educational services in the most integrated setting in the community.
- To participate regularly in indoor and outdoor recreation.
- To not be required to perform labor.
- To have access to adequate food and shelter.
- To a reasonable accommodation if, due to a disability, the housing and services are not sufficiently accessible.

### PacificSource Community Solutions Member Responsibilities

- To choose, or help with assignment to, a managed care plan (such as PacificSource Community Solutions), to choose a primary care provider (PCP), and to choose or help us assign you to a primary care dentist (PCD) or a behavioral health provider.

- To take your PacificSource Community Solutions Identification (ID) card with you whenever you need care.

- To treat PacificSource Community Solutions staff and health provider staff with respect.

- To be on time for appointments or call in advance to cancel if you are not able to make it or if you are running late.

- To tell your provider of your behavioral health problems.

- To decide about care before it is given.

- To get behavioral health services from contracted providers. You may get services from noncontracted providers only in an emergency.

- To call PacificSource Community Solutions Customer Service to tell us of an emergency within 72 hours.

- To use only your assigned behavioral health provider for your behavioral health needs.

- To seek periodic health exams and preventive services from your providers.

- To have yearly check-ups, wellness visits, and other services to prevent illness and keep you healthy.

- To use your PCP, PCD, or clinic for diagnostic and other care except in an emergency.

- To get a referral from your PCP or PCD before seeking care from a specialist.

- To use urgent and emergency services appropriately.

- To give accurate information that is included in your medical records.
• To help your providers obtain your medical records from other providers, which may include signing an authorization for release of information.

• To ask questions about conditions, treatments, and other issues related to your care that you don’t understand.

• To use information to make informed decisions before receiving treatment.

• To be honest with your providers to get the best service possible.

• To help create treatment plans with your provider or behavioral health provider.

• To follow prescribed treatment plans to which you have agreed.

• To tell the provider that you have OHP coverage before receiving services and to show your plan ID card upon request.

• To tell your caseworker if you change your address or phone number.

• To tell your caseworker if you become pregnant, let him or her know when you are no longer pregnant, and/or when your baby is born.

• To tell your caseworker if any family members move in or out of your house.

• To tell your caseworker and providers if you have any other insurance available.

• To pay for services that are not covered by your plan.

• To pay the monthly OHP premium on time, if you have a premium.

• To help the plan in pursuing any third party resources available (such as Workers’ Compensation or auto insurance) and to pay the plan the amount of benefits it paid for an injury from any recovery received from that injury.

• To let the plan know of any issues, complaints, or grievances; and

• To sign an authorization for release of healthcare information so that OHP and the plan can get information needed to respond to an administrative hearing request.

9.3.3 Medicare Members’ Rights and Responsibilities

PacificSource Medicare assures our members of the following:

• To be treated with dignity and respect;

• To impartial access without discrimination or unfair treatment in regard to race, ethnicity, national origin, religion, gender, age, mental or physical disability, health status, claims experience, medical history, genetic information, evidence of insurability, or geographic location within the service area;

• To choose a Prepaid Health Plan (PHP) or Primary Care Manager (PCM) as permitted in OAR 410-141-0060, Oregon Health Plan Managed Care Enrollment Requirements, a Primary Care Physician (PCP) or service site, and to change those choices as permitted in OAR 410-141-0080, Oregon Health Plan Disenrollment from PHPs, and the PHP’s administrative policies;

• To refer oneself directly to mental health, chemical dependency, or family planning services without getting a referral from a PCP or other in-network provider;

• To have a friend, family member, or advocate present during appointments and at other times as needed within clinical guidelines;

• To be actively involved in the development of his/her treatment plan;

• To be given information about his/her condition and covered and noncovered services to allow an informed decision about proposed treatment(s);

• To consent to treatment or refuse services, and be told the consequences of that decision, except for court ordered services;
• To receive written materials describing rights, responsibilities, benefits available, how to access services, and what to do in an emergency;
• To have written materials explained in a manner that is understandable to the Medicare member;
• To receive necessary and reasonable services to diagnose the presenting condition;
• To receive covered services under the Oregon Health Plan that meet generally accepted standards of practice and is medically appropriate;
• To obtain covered preventive services;
• To have access to urgent and emergency services 24-hours a day, seven days a week as described in OAR 410-141-0140, Oregon Health Plan Prepaid Health Plan Emergency and Urgent Care Services;
• To receive a referral to specialty practitioners for medically appropriate covered services;
• To have a clinical record maintained which documents conditions, services received, and referrals made;
• To have access to one’s own clinical record, unless restricted by statute;
• To transfer of a copy of his/her clinical record to another provider;
• To execute a statement of wishes for treatment, including the right to accept or refuse medical, surgical, chemical dependency or mental health treatment and the right to execute directives and powers of attorney for healthcare established under ORS 127 as amended by the Oregon Legislative Assembly 1993 and the OBRA 1990 – Patient Self-Determination Act;
• To receive written notices before a denial of, or change in, a benefit or service level is made, unless such notice is not required by federal or state regulations;
• To know how to make a complaint or appeal with the Prepaid Health Plan (PHP) and receive a response as defined in OAR 410-141-0260 to 410-141-0266;
• To request an administrative hearing with the Department of Human Services (DHS or Department);
• To receive interpreter services as defined in OAR 410-141-0220, Oregon Health Plan Prepaid Health Plan Accessibility; and
• To receive a notice of an appointment cancellation in a timely manner.

**PacificSource Medicare Member Responsibilities**

• To keep his/her appointments with providers at the scheduled time and date, or notify the provider when unable to keep the appointment.
• To present the PacificSource Medicare ID card prior to receiving services.
• To provide complete and accurate information about his/her medical conditions and history when seeking medical assistance.
• To follow the care and treatment plan recommended by his/her provider(s) and agreed upon by the member.
• To pay all applicable copays and fees at the time of service, and keep current on his/her monthly premium payments.
• To notify PacificSource Medicare immediately of any changes in his/her address, phone number, or membership status.
• To notify Customer Service about any changes in health insurance coverage from other sources, such as employers, spouse’s employer, worker’s compensation, Medicaid, or liability claims such as claims from an automobile accident.
**Member Access to Information Regarding Their Rights**

Each member is provided an Evidence of Coverage (EOC) that provides detailed information regarding their rights as a member of PacificSource Medicare. Additional information and resources regarding member rights is available to members by calling our Customer Service department.

Interpreter services are available to answer questions from non-English speaking members. We can also give you information in Braille, large print, or other alternate formats if requested. Members eligible for Medicare because of a disability are provided information about the plan’s benefits and rights that is accessible and appropriate for their needs.

If members have any trouble getting information from PacificSource Medicare because of problems related to language or a disability, please call Medicare at (800) MEDICARE or (800) 633-4227, 24 hours a day, seven days a week, and tell them that you want to file a complaint. TTY users should call (877) 486-2048.

**9.4 Member Grievance and Appeals Process**

PacificSource is responsible for providing a meaningful process for timely resolution of all member complaints. These complaints can be grievances (concerns about the quality of care or access to services) or formal appeals of denied services (claims or service denials).

PacificSource Medicare, PacificSource Community Solutions (Medicaid) and Commercial plans have different processes. Each process meets any and all guidelines established by the relevant regulatory agency, such as the Centers for Medicare and Medicaid Services (CMS) and the Department of Consumer and Business Services (DCBS).

All plan members receive information about their grievance and appeal rights in their Member Handbook/Evidence of Coverage. If payment of a claim is denied as member responsibility, or coverage of a service is denied on a preapproval/preauthorization request, members are individually notified in writing of their appeal rights. This notice informs the member of his/her appeal rights and other information regarding the process, including outside review if appropriate. In the case of Medicaid members, they may receive written notice of claim denials even though they are not financially responsible in most situations.

In reviewing the grievance or appeal, it may be necessary to obtain additional information from a physician or provider’s office. If this is necessary, Grievance/Appeals staff will contact the appropriate office with the request. Because there is an established time frame to resolve these issues, your prompt assistance is greatly appreciated.

The grievance and appeal process is outlined step by step in member handbooks. If a member is dissatisfied with the action of the health plan, or any of its contracted entities, the member is entitled to file an appeal or grievance. Upon inquiry, please have them contact:

**PacificSource Commercial Customer Service**

**Oregon:** (541) 684-5582, (888) 977-9299  
**Idaho:** (208) 333-1596, (800) 688-5008  
**Montana:** (406) 442-6589, (877) 590-1596  
**Washington:** (866) 566-1224  
**Fax:** (541) 684-5264  
**Email:** cs@pacificsource.com
Please note: A provider can file an appeal or grievance on a member’s behalf with an appropriate and valid Appointment of Representative (AOR) form.
10. Claims

10.1 Eligibility and Benefits

PacificSource has a dedicated Customer Service department available to assist both you and your patients with questions related to claims status, benefits, and eligibility. Interpreter services are available to answer questions from non-English speaking members. Information is also available in Braille, large print, or other alternate formats upon request. Call PacificSource Customer Service for:

- Member benefits, eligibility information, or waivers
- Deductible, coinsurance and/or copay information
- Explanation of payments/vouchers
- In-network physicians and providers
- Claims inquiries
- Claim-specific billing and/or coding questions
- Referrals or authorization inquiries

Commercial contacts:

Toll-free: (855) 896-5208 or (888) 977-9299
TTY: 711
Fax: (541) 684-5264
Email: cs@pacificsource.com

Medicaid contacts:

Toll-free, all areas: (800) 431-4135
Bend area: (541) 382-5920
TTY: 711
Fax: (541) 322-6423
Email: CommunitySolutionsCS@pacificsource.com

Dental providers may be referred to their DCO for more specific information.

Hours: 8:00 a.m. to 5:00 p.m. Monday to Friday

Medicare contacts:

Bend: (541) 385-5315
Boise: (208) 433-4612
Springfield: (541) 225-3771
Toll-free: (888) 863-3637
TTY: 711
Fax: (541) 322-6423
Email: MedicareCS@PacificSource.com

Customer Service is available:

- October 1–March 31: 8:00 a.m. to 8:00 p.m. local time zone, seven days a week
- April 1–September 30: 8:00 a.m. to 8:00 p.m. local time zone, Monday–Friday
10.2 HCPCS Coding

PacificSource requires current HCPCS coding for durable medical equipment, supplies, and office medication whenever possible. Utilization of this coding system is designed to promote uniform medical services reporting and statistical data collection. The HCPCS Level II code book is prepared for use with Current Procedural Technology (CPT) codes published by the federal government and is the standard for coding these services.

The Centers for Medicare Medicaid Services, (CMS) updates HCPCS codes annually. CMS created this series of codes to supplement CPT coding, which does not include coding for nonphysician procedures, such as durable medical equipment and specific supplies. In addition, more specific codes were created for the administration of injectable drugs. If a compatible CPT code is available, always use the CPT code instead of the HCPCS code.

PacificSource Medicare follows Medicare LCD’s/NCD’s coding for DME billing. These coding guidelines can be found at CMS.gov/Medicare-coverage-database.

Durable Medical Equipment (DME) and Supplies, Including Orthotics and Prosthetics

- Use the appropriate E, K, or L code to describe durable medical equipment, supplies, orthotics, or prosthetics.
- Durable Medical equipment over $500 requires preauthorization. Please see the Medical Management section, Services Requiring Preauthorization.
- If there is no code, use the appropriate unlisted procedure code and include a description of the item.

Drug Administration

- Use the appropriate J code to describe drugs administered, including injectable, oral, and chemotherapy drugs.
- Look closely at the code description for unit or dosage information. If more than the designated unit or dosage amount is used, enter the multiple value in the “Number of Service” area on the CMS 1500 form.
- If there is no code, use the appropriate unlisted procedure code and include a description of the item.
- Sterile Tray

Use HCPCS code A4550.

Special Report

A special report is required when a new, unusual, or variable procedure is provided.

Unlisted Procedures

Use an unlisted procedure code only when the service or supply is not otherwise classified. Claims coded with miscellaneous HCPCS codes may be subject to review by Health Services, and may require a report.
Modifiers

Under certain situations, a code may require a modifier to indicate that the procedure has been altered by a specific circumstance. In some instances, modified procedures may be subject to review by Health Services. A special report may be required to clarify the use of the modifier.

### 10.3 Claims and Payment Rules

#### General Claims Information

PacificSource will process claims in an accurate and timely manner in order to provide quality service to our members and providers and to efficiently manage healthcare premium dollars. PacificSource reserves the right to do retrospective review of claims paid.

PacificSource requires claims to be submitted either on a current standard CMS 1500 claim form or a UB-04 claim form. The following describes the appropriate claim form by type of provider or service.

- Hospital claims will be billed on the UB-04 using billing rules for PacificSource members to facilitate collection of encounter data.
- Physician claims will be billed on the CMS-1500 using billing rules for PacificSource members to facilitate collection of encounter data.
- All other claims except Pharmacy (DME, Lab/X-ray, Transportation, Ancillary services) will be billed on the CMS-1500 according to billing rules for PacificSource members. PacificSource Medicare will work with in-network providers to ensure they have the necessary guides to ensure proper billing.

With the advent of encounter data collection by CMS, health plans doing business with state and federal government (such as PacificSource Medicare) are now required to report to the most specific or fifth ICD-10 digit on all CMS-1500 and UB-04 forms. Not only is coding specificity and accuracy extremely important, but placement of the information in the appropriate box on the forms has become critical. Following is a brief overview of the coding rationale.

First, if offices and hospitals submit claims with accurate coding, it is likely a claim will not be rejected by PacificSource. This will also result in a quicker payment turnaround time. In addition, the need to rebill will be minimized.

Second, CMS (Medicare) uses the “encounter information” captured from the data submitted on CMS-1500’s and UB-04’s to establish risk scores for members enrolled in the various health plans. CMS reimbursement will be determined from the risk scores. Plans that enroll sicker members will receive better funding to compensate providers for care provided to health plan members. However, risk adjustment works only with complete and accurate data.

#### General Payment Guidelines

An important element in claims filing is the submission of current and accurate codes to reflect the provider’s services.

HIPAA-AS mandates the following code sets:

- The Internal Classification of Disease, Ninth Revision–Clinical Modification (ICD-9-CM) (Effective 10/01/14 ICD-10-CM)
- The Healthcare Common Procedure Coding System (HCPCS)
• Modifier reported when appropriate; follow CPT and HCPCS coding guidelines
• Place of Service 2-Digit Place of Service Codes CMS.gov/Medicare/Coding/place-of-service-codes/Place_of_Service_Code_Set.html

Providers are required to use the standard CMS codes for ICD, CPT, and HCPCS services, regardless of the type of submission.

PacificSource Medicare covers the professional and technical components of global CPT procedures. Therefore, the appropriate professional component modifiers and technical component modifiers should be included on the claim form.

Claims processing is subject to change based upon newly promulgated guidelines and rules issued by CMS.

For payment of Medicare claims, PacificSource has adopted all guidelines and rules established by CMS. PacificSource Medicare members may only be billed for their applicable copays, coinsurance, and noncovered services.

PacificSource Community Solutions does not process claims for dental services. Please refer to your Dental Care Organization for claims processes.

Instructions to complete claim forms
CMS.HHS.gov/Manuals/IOM/list.asp
  • UB-04 (chapter 25)
  • CMS-1500 (chapter 26)

Commercial Claims Submission
Electronic payor ID: 93029
(Please note, the payor ID for PacificSource Administrators: 93031.)

Affiliated clearinghouses:
For a list of clearinghouses, visit our website at PacificSource.com/providers/medical/claims-guidelines, or contact your Provider Service Representative.

You may also submit claims via paper submission by mailing the appropriate claim form to the following address.

Claims Mailing Address:
Please submit claims to the following address:
PacificSource Health Plans
PO Box 7068
Springfield, OR 97475-0068
Medicaid Claims Submission
Electronic payor ID: 20416

Affiliated clearinghouses:
- inMediata
- Change Healthcare
- Trizetto Provider Solutions
- Availity
- MCPS
- Office Ally
- Payer Connection
- McKesson

You may also submit claims via paper submission by mailing the appropriate claim form to the following address.

Claims Mailing Address:
PacificSource Community Solutions
PO Box 7068
Springfield, OR 97475-0068

Medicare Claims Submission
Claims should be submitted in one of the following formats:
- Electronic claims submission
- Electronic payor ID: 20377

UB-04 Form/CMS-1500 Form

Mail to:
PacificSource Medicare
PO Box 7068
Springfield, OR 97475-0068

This section provides information about claims submission, processing and payment. Providers should submit all claims for PacificSource Medicare members, except for certain services that must be billed to Original Medicare (e.g., certain clinical trial services CMS determines and hospice care). If a provider submits a claim to PacificSource Medicare that should have been submitted to Original Medicare, PacificSource Medicare will return the claim to the provider.

PacificSource Medicare claims should be submitted using Medicare billing guidelines and format (CMS-1500 or UB-04), and the National Provider Identifier (NPI). Additional information is available from CMS at CMS.hhs.gov/Manuals/IOM/list.asp. Search for publication #100-04.

Providers should include the member’s complete identification number (ID) when submitting a claim. PacificSource Medicare member ID numbers are 9 digits long and begin with the number 6. PacificSource Medicare cannot process claims with incorrect or incomplete member identification numbers.

Claims submitted without all required information will be returned (paper submission) or denied (electronic submission).
10.4 Claims Submission Requirements

When to Submit Claims

PacificSource encourages providers to submit all claims as soon as possible after the date of service to facilitate prompt payment and avoid delays that may result from expiration of timely filing requirements. Exceptions may be made to the timely filing requirements of a claim when situations arise concerning other payor primary liability such as Original Medicare, Medicaid or third-party insurers, or legal action and/or an error by PacificSource Medicare.

PacificSource Medicare must submit encounter data and medical records to certify completeness and truthfulness of information submitted to CMS, [42 CFR 422.50(a) (8); CFR 422.50(1), (2) and (3)]. In turn, PacificSource Medicare network providers must submit complete and accurately coded claims, and assist PacificSource Medicare in correcting any identified errors or omissions.

PacificSource Medicare reserves the right to do retrospective review of claims paid.

Timely Submission of Claims

PacificSource abides by CMS Prompt Payment Guidelines. Timely submission is subject to statutory changes. Therefore, claims should be submitted within the timely filing period established by regulatory statute (365 days), unless your contract stipulates something different. Providers should reference their contract with PacificSource Medicare for the stipulated claims submission guidelines. Note that Medicaid has a different timeline for initial claims submissions (4 months).

When PacificSource is secondary, submit your claim with the primary carrier’s EOB. Providers have up to one year from the date of payment/denial from the primary carrier to submit to PacificSource.

Plan members cannot be billed for services denied due to a lack of timely filing. Claims appealed for timely filing should be submitted with proof along with a copy of the Explanation of Payment (EOP) and the claim.

Acceptable proof of timely filing will be in the form of a registered postal receipt signed by a representative of the plan or a similar receipt from other commercial delivery services.

Electronic Medical Claims

PacificSource is proactive in moving claims electronically, and we encourage providers to consider electronic billing opportunities. Some of the benefits providers can realize by transmitting claims electronically are:

- Faster reimbursement. By eliminating the time it takes for mailing, internal routing, and data entry, claims are in our system much faster, and are processed sooner.
- Reduced costs. Electronic billing saves providers money by eliminating the cost of forms, postage, and staff time.
- Accuracy. Electronic claims transmittal helps prevent errors and omission of required information, resulting in accurate claims processing.

We strongly encourage electronic billing. These benefits can be translated into increased efficiency and productivity, resulting in improved patient relations. Your office will realize greater efficiency through a more streamlined process.

The Health Information Portability and Accountability Act of 1996 (HIPAA) – Transaction and Code Set standards mandates that electronic healthcare claims submitted from a provider to a payor must be in a Standard 837-5010 format. PacificSource is currently accepting 837-5010 HIPAA compliant claim transactions either directly from provider offices or through our clearinghouses.
What are the technical requirements?
To submit your HIPAA-compliant claim transactions directly to us you must be able to create an 837-5010 Professional or Institutional claim transaction. You must have an Internet connection and a web browser capable of the strongest encryption level available (currently 128-bit). You also need a printer attached to your system or available through your office network in order to generate your receipts.

Your Provider Service Representative can assist you with questions you may have regarding electronic billing. This applies to both regular submitters or if you would like to begin billing electronically.

Who should I contact to get started or for technical support?
For information on connecting to an electronic clearinghouse, please contact our Information Technology department by phone at (800) 624-6052, ext. 2251, or by email at info@pacificsource.com.

Common Claim Filing Errors
Proper payment of claims is a result of efforts of the provider, employee clinicians, and billing personnel, and of adherence to national and local payment policy requirements. This section: (a) describes common claim filing errors that can result in claim rejections or claim denials, (b) includes general requirements for properly resubmitting rejected claims, and (c) discusses the process for appealing a denied claim.

Generally, the common types of errors that result in claim denials are:

- Billing/data entry errors
- Noncompliance with coverage policy
- Billing for services that are not medically necessary
- Incorrect member ID number
- Invalid/missing diagnosis code
- Past timely filing requirements
- Incorrect provider number
- Missing, incorrect or invalid modifier
- Invalid/missing Healthcare Common Procedure Coding Systems (HCPCS) code
- Missing or incorrect quantity

In some cases, additional documentation may be required in order for the claim to complete adjudication. After PacificSource receives the additional information, the claim is adjusted or corrected.

Payment or Denial of Health Benefit Plan Claims (743.911)

- Except as provided in this subsection, when a claim under a health benefit plan is submitted to an insurer by a provider on behalf of an member, the insurer will pay a clean claim or deny the claim not later than 30 days after the date on which the insurer receives the claim. If an insurer requires additional information before payment of a claim, not later than 30 days after the date on which the insurer receives the claim, the insurer will notify the member and the provider in writing and give the member and the provider an explanation of the additional information needed to process the claim. The insurer will pay a clean claim or deny the claim not later than 30 days after the date on which the insurer receives the additional information.

- A contract between an insurer and a provider may not include a provision governing payment of claims that limits the rights and remedies available to a provider under this section and ORS 743.913 or has the effect of relieving either party of their obligations under this section and ORS 743.913.
• An insurer will establish a method of communicating to providers the procedures and information necessary to complete claim forms. The procedures and information must be reasonably accessible to providers.

• This section does not create an assignment of payment to a provider.

• Each insurer will report to the Director of the Department of Consumer and Business Services annually on its compliance under this section according to requirements established by the director.

• The director will adopt by rule a definition of “clean claim” and will consider the definition of “clean claim” used by the Federal Department of Health and Human Services for the payment of claims. [Formerly 743.866]

Hold Harmless/Balance Billing

In the event the insurer fails to pay for healthcare services covered by PacificSource, the provider will not bill or otherwise attempt to collect from members for amounts owed by insurers, and members will not be liable to the provider for any sums owed by the insurer. Nothing in this section will be construed to in any manner limit the applicability of ORS 750.095 (2).

Nothing in this section impairs the right of a provider to charge, collect from, attempt to collect from, or maintain a civil action against a member for any of the following:

• Deductible, copay or coinsurance amounts.

• Healthcare services not covered by the healthcare service contractor.

• Healthcare services rendered after the termination of the contract between the PacificSource Medicare and the provider, unless the healthcare services were rendered during the confinement in an inpatient facility and the confinement began prior to the date of termination or unless the provider has assumed post-termination treatment obligations under the contract.

Members may seek and accept financial responsibility for noncovered healthcare services from a provider.

PacificSource Medicare does not limit the right of a provider to contract with the member for payment of services not within the scope of the coverage offered by PacificSource Medicare.

Billing Guidelines

We follow Medicare guidelines for all lines of business. Below are some of the more common ones:

• Multiple Procedure Reduction

• Assistant Surgeon Allowances

• Global Billing Period

• DRG payment criteria

• Eliminating Procedure Code Unbundling

Unbundling occurs when a provider bills in multiple parts for a procedure that would typically be reported under a single comprehensive code. This unethical act reflects improper procedure reporting under CCI coding requirements. CMS has identified specific code pairs that PacificSource will reject if a provider bills for them for the same patient on the same day. In most unbundling cases, providers cannot bill beneficiaries for amounts Medicare denies due to unbundling. PacificSource has adopted a policy of reviewing claims to ensure correct coding. The plan utilizes a corrective coding re-bundling/unbundling software, which is integrated with our claims payment system. Services that should be bundled and paid under a single procedure code will be subject to review.
Audit and Disclaimer Information

PacificSource reserves the right to conduct audits on any provider and/or facility to ensure compliance with the guidelines stated. If such an audit determines that the office/facility did not comply with this payment policy, PacificSource will expect the office/facility to refund all payments related to noncompliance. For more information about PacificSource’s audit policies, refer to the Claims Review Guidelines in this manual. This policy provides information on PacificSource claims adjudication processing guidelines. As every claim is unique, the use of this policy is neither a guarantee of payment nor a final prediction of how specific claim(s) will be adjudicated. Claims payment is subject to member eligibility and benefits on the date of service, coordination of benefits, referral/authorization and utilization management guidelines when applicable, and adherence to plan policies and procedures and claims editing logic.

Coordination of Benefits (COB)

When scheduling a patient appointment or at patient check-in, be sure to confirm any other coverage the your patient may have. If you patient has other coverage, please follow the coordination of benefits process described below, as well as the requirements outlined under Eligibility and Benefits and Claims Submission Requirements in this section.

If a PacificSource patient has primary coverage with another carrier, the primary carrier should be billed first. We must receive the claim no later than 365 days from the primary carrier’s EOB date. Upon receipt of payment from the primary carrier, charges should then be submitted to PacificSource, accompanied by the primary carrier’s Explanation of Benefits.

When PacificSource is secondary, Coordination of Benefits will be reimbursed according to the contract allowable or charges, whichever is less.

When PacificSource is the secondary plan, we will calculate the benefits we would have paid on the claim in the absence of other healthcare coverage and apply that calculated amount to the PacificSource claim. We may pay for all or part of the amount that is unpaid by the primary plan.

PacificSource will credit to the member’s benefits, the deductible amounts we would have credited to the member’s deductible in the absence of other healthcare coverage.

Claim Review Guidelines

PacificSource reserves the right to review any claims submitted for medical necessity, proper coding, or medical appropriateness.

Overpayment Recovery

PacificSource may initiate provider refunds up to one year from the date of payment. In the event that CMS terms (retro-disenrolls) a member, PacificSource Medicare reserves the right to initiate provider refunds for any applicable time period which may be longer than one year from the date of payment.

Network providers are required to report overpayments that they identify to PacificSource. For overpayments made by PacificSource Community Solutions you must return the overpayment within 60 calendar days of the date the overpayment was identified, and notify us in writing with the reason for the overpayment.

In response to Oregon Senate Bill 508, PacificSource has adapted a new refund policy that will apply to all providers regardless of geographic location or network status. This policy will override any contract language. Our refund policy is as follows:
PacificSource will send the provider an initial refund request.

- 30 days from the initial request: If we have not received a refund, or the provider has not contested the refund within this timeframe, we will send a reminder (second refund request).
- 60 days after the initial request: If we have still not received the refund, the overpayment will be auto-recovered on the next scheduled payment. Please see EOP examples on the following pages.

To contest a refund, PacificSource requires the use of our Contested Refund Form, which is available at our websites. In addition to the form, supporting documentation is required to contest the refund. Examples of documentation include but not limited to:

- A new primary EOP when coordination of benefits is involved
- Chart notes that support the original payment

### 10.5 Corrected Claims Submission

PacificSource strives to make the claims process as efficient as possible. Therefore, we ask that when you submit a corrected CMS 1500 claim for professional claims you simply append a modifier “cc” to the line that is being altered. For facility claims billed on a UB04, please use a “7” in the type of bill frequency. This electronic process will help to expedite your request.

Corrected claims submission time frames:

- **Commercial**—six months from the date the original claim was processed, not to exceed eighteen months from the date of service
- **Medicare**—twelve months from the date of service or date of last process
- **Medicaid**—four months from claim processing date on the original Explanation of Benefits.

If chart notes are needed to help support a correction, we will request those at the time of review.

### 10.6 Medicare: Special Benefits

**Hospice Care—PacificSource Medicare**

You must bill Original Medicare except for benefits that are exclusively covered by PacificSource Medicare. Claims that are not related to the hospice condition should be billed directly to Original Medicare with modifiers such as “GW” and “GV.”

Although a member can revoke hospice at any time, claims should continue to be paid by Original Medicare until the first of the month following hospice termination. Please refer to the table below as a quick reference guide.

<table>
<thead>
<tr>
<th>If the patient:</th>
<th>Submit all claims to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrolls in hospice on the 1st of the month</td>
<td><strong>Original Medicare</strong></td>
</tr>
<tr>
<td>Revokes their hospice election on or after the 1st of the month</td>
<td><strong>Original Medicare</strong></td>
</tr>
<tr>
<td>Enrolls in hospice after the 1st of the month</td>
<td><strong>Original Medicare</strong></td>
</tr>
<tr>
<td>Enrolls in hospice after the 1st of the month and revokes their election the same month</td>
<td><strong>Original Medicare</strong></td>
</tr>
<tr>
<td>Enrolls in hospice at the 1st of the month, but services billed are not covered by Original Medicare</td>
<td><strong>Original Medicare is first. Submit Medicare EOB and claim to PacificSource Medicare second.</strong></td>
</tr>
</tbody>
</table>
10.7 **Explanation of Payment (EOP)**

**How to Read Your EOP**

The PacificSource Explanation of Payment (EOP) is a statement that is mailed, along with payment, to physicians and providers on each scheduled payment date. The following information explains how to interpret the PacificSource Medicare EOP:

Patient, plan, and provider information section: The patient name, provider name, anc clinic name are listed in the first row. The second row includes the PacificSource Medicare member ID, provider number, and the plan name (product). The third row includes the patient account number assigned by the provider, the PacificSource Medicare claim number, and the provider NPI number.

Claim processing detail section: This section breaks down how PacificSource Medicare processed the claim. The fields include:

- Date of Service
- Procedure Codes
- Units
- Billed Amount
- Allowed Amount
- Risk Withhold
- Provider Adjustment
- Reason Code
- Deductible Amount
- Copay Amount
- Coinsurance Amount
- Total Patient Responsibility
- Net Paid Amount

Reason Code Explanations: This information appears at the end of the disbursement section. If further claim status clarification is needed, please contact our Customer Service department.
10.8 Prompt Pay Policy

- PacificSource will pay or not approve a clean claim not later than 30 days after the date we receive the claim.
- We will begin counting the number of days either on the day PacificSource actually receives the claim, or on the day our representative (who performs claims handling, including pricing, on our behalf) receives the claim—whichever day comes first.
- A clean claim is a claim that has no defect, impropriety, lack of any required substantiating documentation, or particular circumstance requiring special treatment that prevents timely payment.
- If additional information is necessary in order to process a claim, we will notify the provider and the enrollee in writing of the delay, and provide an explanation of the additional information required. We will process the claim not later than 30 days after the date we receive the additional information.
  - Provider contracts shall not include any provisions that are contrary to this policy.
  - PacificSource has an established method for informing providers of the necessary information to correctly submit a claim, and will make that information easily accessible.
- If we fail to pay a claim within 30 days of receipt when no additional information is needed, or within 30 days from the receipt of the additional information requested, we will pay simple interest of 12 percent per annum on the unpaid amount of the claim that is due. The interest will accrue from the date after the payment was due until the claim is paid. Interest payments will be limited to those required by state or federal law.
- If the interest is $2.01 or more, the interest will be paid with payment of the claim (we do not pay interest of $2.00 or less).

10.9 Accident Report Policy

Accident information is essential for determining which insurance company has primary responsibility for a claim. There are three main situations that may arise where another insurance carrier could be liable for benefits.

On-the-job Injury

PacificSource policies generally are not responsible for any services or supplies for sickness or injury arising out of, or in the course of, employment for wages or profit where state law requires employers to provide their employees with some type of Workers’ Compensation coverage for job related medical bills. This may include situations where a business or employer can elect not to provide such coverage.

Determination of actual legal responsibility can delay payments. Depending on the state where the policy was issued, the member may be eligible for interim benefits prior to the determination of actual legal responsibility. Please contact PacificSource Third Party Recovery team for more information.

Motor Vehicle Accident

Any expense which results from a motor vehicle injury and which is payable by a motor vehicle insurance policy without regard to liability will not be a covered expense under a PacificSource policy. This includes, for example, any injury involving an auto including getting into, out of or working on a car.

In Oregon, these types of injuries fall under Personal Injury Protection, Oregon’s No Fault Auto Coverage.

In Idaho, health insurance is coordinated with auto insurance under Idaho Coordination of Benefits (COB) rules.
Until it is determined who is legally responsible for an injury, PacificSource may require a subrogation agreement to be signed before we can process any claims related to the injury. Upon receipt of this signed agreement, PacificSource is then able to process claims according to the contract benefits. If it is a payable claim through the third party, PacificSource is then reimbursed on the amount paid on the case.

**Third Party Liability**

An employee or an eligible dependent may have a legal right to recover the costs of his or her healthcare from a third party that may be responsible for the illness or injury. For example, if a person was injured in a business, the owner may be responsible for the healthcare expenses arising out of the injury under the premise’s medical coverage. As another example, a third party’s homeowners insurance may be responsible for an injury to someone outside his or her immediate family when an injury is sustained on the homeowner’s property.

Depending on the terms of the member’s policy, PacificSource may extend benefits while the member is pursuing recovery from the responsible party. Claims would be processed at contract benefits and PacificSource would expect to be reimbursed for any claims paid once settlement is reached.

**10.10 Coordination of Benefits**

**Group Health Insurance Coverage**

Usually, group health insurance coverage, in Idaho, Montana, Oregon, and Washington, follows the COB order of benefits indicated below. Self-insured employer groups may not be subject to state insurance regulations and may follow different COB rules. If that is the case, a self-insured and a fully insured Plan may coordinate benefits differently than stated below.

**Individual Health Insurance Coverage**

In Oregon, the term “Plan” does not include individual or short term health insurance policies. Generally, individual coverage will only pay the amount not covered by any other coverage. This is generally referred to as “nonduplication of benefits” (not COB).

**Nondependent or Dependent**

The Plan that covers the person other than as a dependent (e.g., employee, member, subscriber, or retiree) is primary.

**Dependent Child Whose Parents Live Together**

For a dependent child whose parents are married or living together, whether or not they have ever been married:

- The Plan of the parent whose birthday falls earlier in the calendar year is primary.
- If both parents have the same birthday, the Plan that has covered the parent longer is primary.

**Dependent Child of Divorced or Separated Parents**

For a child whose parents are divorced or separated or not living together, whether or not they have ever been married:
• If a court decree states one parent is responsible for the child’s healthcare expense, and the Plan is aware of the decree, the Plan of that parent is primary.

• If a court decree states that both parents are responsible for the child’s healthcare expense, or assigns joint custody without specifying responsibility, the rule for “Dependent Child Whose Parent Live Together” (above) apply.

• If there is not court decree allocating responsibility for the child’s healthcare expense, the Plan of the parent that has custody of the child is primary; the Plan of the spouse of the custodial parent is second; the Plan of the noncustodial parent is third; and the Plan of the spouse of the noncustodial parent is fourth.

Active/Inactive Employees
The Plan covering the person as an active employee, or dependent of an active employee when none of the above rules apply, is primary.

The Plan covering the person as an inactive employee, (e.g., retired or laid-off employee), or dependent of an inactive employee when none of the above rules apply, is secondary.

COBRA or State Continuation Coverage
The Plan covering a person as an employee, member, subscriber, or retiree or the dependent of an employee, member, subscriber, or retiree is primary to a Plan covering the person as a COBRA or state continuation beneficiary.

Longer/Shorter Length of Coverage
If none of the above rules apply, such as when a self- insured and fully insured Plan’s COB provisions do not agree, generally the Plan that covered the person the longest will be primary.

Document Imaging
Imaging technology (scanning paper and electronically storing and displaying an image of the paper on screen) has been utilized in business for many years. The advent of a computer network within PacificSource and the decreased price of hardware has made imaging technology a realistic and efficient method of storing paper.

PacificSource began the transition to electronic imaging in March 1998. The first application involves claims entry and retrieval. Claims are sorted into CMS 1500, UB-92, dental and miscellaneous categories and shipped to a service bureau in Portland. The bureau scans the documents, stores the images onto high- volume media and ships them back to PacificSource.

Guidelines for submitting claims for imaging:
• Use the CMS 1500 form
• Printing should be dark and clear
• 10- to 12-point type
• Black or blue print
• No discoloration or smudges
• Information aligned in appropriate box
• Only required claim form information
• Only one code per service line
• Circle specific pertinent information
• Diagnosis appropriate to date of service in box 21(1)
• Box 24(E) diagnosis corresponds to box 21(1)
• Block 25—Federal Tax Identification number
• Block 33—PIN (assigned PacificSource provider/payee number)

The above guidelines will help ensure the timely processing and payment of claims.
11. Billing Requirements

By using the correct procedure codes when you bill PacificSource, you enable us to process your claims accurately and efficiently. In efforts to keep administrative costs down and to ensure timely and accurate claims reimbursement, we require that services performed on the same day by the same provider be billed on the same claim form. This will help eliminate reprocessing of claim refund requests.

11.1 Incident to Billing

PacificSource credentialing standards follow the guidelines of the National Committee on Quality Assurance (NCQA). The PacificSource and delegate credentialing process includes meticulous verification of the education, experience, judgment, competence, and licensure of all healthcare providers.

PacificSource allows “incident to” billing for caregivers who are not eligible to be credentialed by PacificSource or a delegated credentialing entity. This provides practices the opportunity to fully utilize their staff appropriately. PacificSource does NOT allow “incident to” billing for practitioners who are eligible for credentialing.

Effective June 1, 2018, in order for a service to be considered for payment under the “incident to” billing policy, the modifier SA must be appended to the CPT code. Only claims with the required SA modifier, will be considered eligible for “incident to” billing.

In limited situations, PacificSource allows for exceptions to the credentialing and modifier SA requirements. Examples of these exceptions are:

- In the event that another policy exists that conflicts with this policy and allows exception to this rule, precedence will be given first to the rules of that policy. For example, PacificSource does allow for licensed behavioral health professionals who are eligible for credentialing to bill under the “incident to” status if the services being rendered are part of an applied behavior analysis (ABA). These services are exempt from the modifier SA requirement.

- The CPT/HCPCS code being billed is inherently considered a collaborative care service, such as G0511 and G0512 for Care Coordination Services or G0502, G0503, G0504, and G0507 for Behavioral Health Integration Services. These codes are exempt from the modifier SA requirement. PacificSource will follow CMS Guidelines in the use and payment of these types of services.

In order to provide care that will be billed to PacificSource using “incident to” status, the caregiver must be ineligible to be credentialed by PacificSource or its delegated credentialing entity. In addition, if the caregiver’s profession is licensable in the state where services are provided (e.g., nursing, social work), then the caregiver must hold an active license and be providing services within the scope of that license. If the caregiver’s profession is not licensable in the state where services are provided (e.g., medical assistants, community health workers), then the caregiver must be working under the license and within the scope of practice of the licensed clinician under whom services are being billed. PacificSource requires strict adherence to the following guidelines, and these criteria must be met in order for services to be billed as “incident to.”

PacificSource allows “incident to” billing only if the following criteria met:

- The patient must be established in the practice.
- The services must be provided under the direct supervision of the physician or credentialed, qualified non-physician practitioner.
- The supervising provider must actively participate in the continuation of the patient’s course of care, with periodic face-to-face encounters. Care may not be transferred to a non-credentialed provider.
• The original supervising provider, or similarly qualified substitute supervising provider, must be present in the office suite at the time of service delivery and available to provide any necessary assistance.
• The patient must have a covered condition that was initially diagnosed by the supervising provider.
• The services must be medically necessary and an integral part of the patient’s care.
• Services must be rendered in a physician’s office or clinic (not in an institutional setting).
• Services rendered under the “incident to” billing policy must be billed under the credentialed, supervising provider.
• PacificSource will adhere to CPT Billing Guidelines in the payment of services billed under the “incident to” billing policy.
• The caregiver billing under the supervising provider must be an employee of the practice (i.e., a W-2 employee).

PacificSource also allows “incident to” billing for:

• Behavioral health residency practitioners when the psychology resident is a graduate of an APA accredited doctoral program and has been vetted and placed on the state Board of Psychologists registry.
• Master level graduates from an accredited program in social work, professional counseling or family and marriage therapy who have been approved in their state to practice under the supervision of an eligible practitioner. They must be actively working on retaining their clinical hours to meet independent licensing requirements according to their respective licensing board.

11.2 Osteopathic Manipulation Treatment

Osteopathic Manipulative Treatment CPT Codes 98925–98929

It is PacificSource policy not to allow an evaluation & management service (E&M) on the same date of service as osteopathic manipulative treatment (OMT). Consistent with CPT coding guidelines, E&M services may only be reported if the work provided is above and beyond what is associated with preservice and postservice manipulative treatment.

According to the American Medical Association, E&M services may be reported separately if, and only if, the patient’s condition requires significant, separately identifiable E&M service, which may be in connection to a new patient or a second diagnosis. However, the presence of a second diagnosis does not necessarily qualify an E&M service as “separately identifiable”.

PacificSource policy for considering a second diagnosis will be as follows:

If a second diagnosis represents a new condition, and requires significant evaluation and management of a separate body system, an E&M code may be reported. Modifier -25 must be attached to the E&M code. PacificSource reserves the right to determine, by chart note evaluation, whether or not an E&M service is warranted.

If a second diagnosis represents a brief recheck of an ongoing, but unrelated condition, an E&M service will be processed to provider write-off.

If a second diagnosis represents the same body system and/or condition, an E&M service will be processed to provider write-off.

Modifier -25—Significant, separately identifiable evaluation and management service by the same physician on the same day of a procedure or other service. The physician may need to indicate that on the day he or she performed a CPT code-identified procedure, the patient’s condition required a significant, separately identifiable E&M service above and beyond the other service provided.
11.3 **Global Period**

**Commercial**

“Global period” is defined as the period of time when services must be included in the surgical allowance. PacificSource uses the number of days indicated in the “Global Period” column of the Federal Register as the standard.

PacificSource considers the following services to be included in the global surgical package. These services are not separately reimbursable when billed by the same physician or by another physician within the same Provider Group (same Tax ID number).

Services include:

- Preoperative E&M services after the decision to perform surgery is made, one day prior to major surgery, and on the same day a major or minor surgery is performed;
- Intraoperative services that are a usual and necessary part of the surgical procedure;
- Anesthesia provided by the surgeon (including local infiltration, digital block or topical anesthesia);
- Supplies;
- Normal, uncomplicated follow-up care for the period indicated in the Federal Register Global Period; and
- All additional medical or surgical post-operative services required of the surgeon during the post-operative period due to complications that do not require additional trips to the operating room.

PacificSource considers the following services to be not included in the global surgical package:

- Preoperative services not encompassed in the global period;
- Evaluation and management services unrelated to the primary procedure;
- Services required to stabilize the patient for the primary procedure;
- Procedures required during the immediate preoperative period that are usually not part of the basic surgical procedure (for example, bronchoscopy prior to chest surgery); and
- Treatment by the original physician for a related post-operative complication that requires a return trip to the operating room.

**Medicaid and Medicare**

A global period is the period of time when services must be included in the surgical allowance; no additional charge may be added. PacificSource Medicare uses the number of days indicated in the “Global Period” column of the Federal Register as the standard.

Time periods designated for the following services are considered global:

- Immediate preoperative care beginning when the decision for surgery has been made.
- The surgical procedure (including local infiltration, digital block, or topical anesthesia).
- Normal, uncomplicated follow-up care for the period indicated (refer to Federal Register “Global Period”).

Preoperative services not encompassed in the global period include:

- Evaluation and management services unrelated to the primary procedure.
- Services required to stabilize the patient for the primary procedure.
- Procedures provided during the immediate preoperative period that are usually not part of the basic surgical procedure (for example, bronchoscopy prior to chest surgery).
11.4 **Commercial: Obstetric and Gynecology Care Billing Guidelines**

**Global OB Care**

The global maternity allowance is a complete, one-time billing which includes all professional services for routine antepartum care, delivery services, and postpartum care. The fee is reimbursed for all of the member’s obstetric care to one provider. If the member is seen four or more times prior to delivery for prenatal care and the provider performs the delivery, the provider must bill the Global OB code, beginning with the date of the initial prenatal visit.

Global maternity billing ends with release of care within 42 days after delivery. Global OB care should be billed after the delivery date.

**Services Included in Global Maternity Care**

- Routine prenatal visits until delivery, after the first three antepartum visits
- Recording of weight, blood pressures and fetal heart tones
- Admission to the hospital including history and physical
- Inpatient Evaluation and Management (E/M) service provided within 24 hours of delivery
- Management of uncomplicated labor
- Vaginal or cesarean section delivery
- Delivery of placenta (see “Billable Services Outside of Global Maternity Care” for examples of when delivery of the placenta may be reimbursed).
- Administration/induction of intravenous oxytocin
- Insertion of cervical dilator on same date as delivery
- Repair of first or second degree lacerations
- Simple removal of cerclage (not under anesthesia)
- Uncomplicated inpatient visits following delivery
- Routine outpatient E/M services provided within 42 days following delivery
- Postpartum care after vaginal or cesarean section delivery

Please use one of the CPT codes listed below when you provide global OB care. Global care includes all obstetrical care for a patient, including delivery, antepartum, and postpartum care. Global OB care should be billed after the delivery date.

- **59400** Routine obstetrical care including antepartum care, vaginal delivery (with or without episiotomy, and/or forceps) and postpartum care
- **59510** Routine obstetric care including antepartum care, cesarean delivery and postpartum care
- **59610** Routine obstetric care including antepartum care, vaginal delivery (with or without episiotomy, and/or forceps) and postpartum care, after previous cesarean delivery
- **59618** Routine obstetric care including antepartum care, cesarean delivery and postpartum care, following attempted vaginal delivery after previous cesarean delivery

**Commercial: Partial Services**

Nonglobal OB care, or partial services, refers to maternity care not managed by a single provider or group practice. Billing for nonglobal OB care may occur if a member transfers care or is referred to another
provider during her pregnancy, a provider from another practice performs the delivery or antepartum care (see the E/M visit info under “Billable Services Outside of Global Maternity Care”), a member terminates or miscarryes her pregnancy, or if the member changes insurers during her pregnancy.

If you provide only partial services instead of global OB care, please bill us for that portion of maternity care only. Please use the codes below for billing antepartum-only, postpartum-only, delivery-only, or delivery and postpartum-only services. Only one of the following options should be used, not a combination.

For Antepartum Care Only

- For 1 to 3 visits: Use evaluation and management codes
- For 4 to 6 visits: 59425
- For 7 or more visits: 59426

Additional evaluation and management visits during the antepartum period must be billed with modifier -25 to support an evaluation and management service for a medical condition unrelated to the pregnancy. As always, you may bill for ultrasound, amniocentesis, special screening tests for genetic disorders (preauthorization is required for many genetic tests, please refer to the preauthorization list), visits for unrelated conditions, or additional frequent visits due to high risk conditions. You will be reimbursed according to contract benefits.

For Postpartum Care Only

59430

Delivery only

- 59409 Vaginal delivery only (with or without episiotomy and/or forceps).
- 59514 Cesarean delivery only
- 59612 Vaginal delivery only, after previous cesarean delivery (with or without episiotomy and/or forceps)
- 59620 Cesarean delivery only, following attempted vaginal delivery after previous cesarean delivery

Delivery and Postpartum Care Only

- 59410 Vaginal delivery only (with or without episiotomy and/or forceps), including postpartum care
- 59515 Cesarean delivery only; including postpartum care
- 59614 Vaginal delivery only, after previous cesarean delivery (with or without episiotomy and/or forceps), including postpartum care
- 59622 Cesarean delivery only, following attempted vaginal delivery after previous cesarean delivery; including postpartum care

Billable Services Outside of Global Maternity Care

- The first three antepartum visits
- Services during the antepartum and postpartum period unrelated to maternity or not in the global period
- Maternal or fetal echography
- Amniocentesis, any method
- Amnioinfusion
• Chorionic villus sampling
• Fetal contraction stress test, and fetal non stress test
• Delivery of the placenta, CPT 59414, is considered integral to a vaginal or cesarean section delivery, this code may be billed if the member delivers vaginally before admission with subsequent delivery of the placenta, or if the placenta is delivered by a provider other than the delivering physician.
• Evaluation and Management (E/M) visits:
  – Additional E/M visits for high risk or complications > 13 antepartum visits
  – E/M visits for conditions unrelated to pregnancy - The diagnosis should clearly identify that the condition is unrelated to pregnancy for the services provided (e.g., appendicitis, bronchitis, cholecystectomy).
  – Maternal Fetal Medicine Specialists seen in addition to the member’s regular provider (if the specialist is in the same practice, then use of mod 25 will indicate a significant and separate E/M service).
  – E/M with an OB ultrasound procedure – E/M CPT codes submitted with modifier 25 may be reimbursed with an OB ultrasound on the same date of service. Mod 26 (professional component) is not reimbursed when performed by the same or other health care professional on the same date of service.

Multiple Births
Multiple births should be billed with the appropriate CPTs depending on the delivery method per newborn:

Vaginal delivery CPTs:
• First newborn 59400, 59409, 59410, 59610, 59612, or 59614
• Subsequent newborn(s): 59409 or 59612

Cesarean delivery CPTs:
• First Newborn: 59510, 59514, 59515, 59618, 59620, or 59622
• Subsequent newborns: 59514 or 59620

Claim reimbursement: 100% allowance for the delivery method with the highest RVU, and subsequent newborns per the multiple procedure reduction rules and the member’s contracted benefit rate.

Midwife Reimbursement
Eligible Certified Nurse Midwives (CNM) will receive reimbursement of services when rendered within the scope of their license.
• Lay midwives, direct-entry midwives, certified midwives (CM), certified professional midwives (CPMs), and doulas will deny in the system as these are ineligible providers.
• Time, services, and medications, are not separately reimbursed as they are part of the global fees.
• Supplies are reimbursed up to $150.00 when billed with the following codes:
  – CPT 99070: Supplies Provided By Physician Over & Above Those Included In The Service (documentation may be required)
  – HCPC S8415: Supplies for home delivery of infant
• If the CNM is unable to perform delivery (another provider delivers), the CNM should only bill for antepartum care.
Increased Procedural Services/Modifier 22

Additional reimbursement may be considered for obstetrical services when the work required to provide a service is substantially greater than typically required, designated by appending modifier 22 (mod 22) to a CPT procedure code. Documentation must support the reason for the additional work (i.e., increased intensity, time, technical difficulty of the procedure, severity of the patient’s condition, physical and mental effort required). Mod 22 may not be appended to an E/M code (2013 Professional Edition/CPT manual).

Clinical records should be submitted with the claim whenever mod 22 is utilized.

One example of an allowed use of mod 22 for obstetrical services:

- Laceration repairs: 3rd and 4th degree laceration repairs may be billed in addition to the delivery or global OB CPTs by appending modifier 22 to the global OB, delivery only, or delivery plus postpartum care CPTs. The allowable is based on the delivery component alone.

Prolonged Services

Prolonged services, CPT codes 99354 to 99357 for services beyond the usual service provided in an inpatient or outpatient setting, and Prolonged Service without direct patient contact, CPT codes 99358 and 99359 non face-to-face services, are not reimbursed for maternity care services.

Noncovered Service Billed with Global or Nonglobal CPT Codes

Travel time billed by the practitioner is not reimbursed.

Assistant Surgeon

Assistant surgeon fees are reimbursed only with an appropriate modifier for eligible providers using nonglobal cesarean section CPT codes (59514, 59620).

Delivery in Nonhospital Settings

Reimbursement for home delivery, birthing centers, or any nonhospital facility setting is subject to the terms of the PacificSource group and provider contracts, provider eligibility for reimbursement, and provider and facility credentialing.

Annual Gynecological Exams

Routine gynecological exams are allowed once each calendar year (or once each benefit year, if plan year).

Any laboratory tests performed are subject to gynecological laboratory benefit. These include:

- Weight and blood pressure check
- Laboratory tests:
  - Occult blood
  - Urinalysis
  - Complete blood count
  - Pap smear
  - Mammography
  - Lab fees CPT 36415, 99000

Any laboratory tests performed, in absence of diagnosis, which are not listed above are subject to the standard preventive laboratory benefits and maximums.
A referral to a women’s health care provider is not required for the annual gynecological exam and medically necessary follow-up visits resulting from that examination when performed within ninety (90) days of the annual gynecological exam.

Screening and counseling for sexually transmitted infections, including HIV, and for interpersonal and domestic violence, when provided during a gynecological exam, will be covered at no cost to the member.

This applies to services with in-network providers and is effective for PacificSource nongrandfathered group policies and Oregon and Idaho individual policies as they renew (or are effective) on or after August 1, 2012. This is effective for all Montana individual policies effective July 1, 2012, regardless of effective or renewal date.

Any laboratory tests performed in absence of diagnosis are subject to the standard preventive care benefits and maximums.

**Screening Papanicolaou Smear HCPCS Code Q0091**

PacificSource considers the collection of the pap specimen to be included in the E&M code when services are provided for a gynecological (GYN) exam (CPT codes 99381 through 99397).

- When Q0091 is billed alone with a diagnosis for a GYN exam; the service will be processed as an annual GYN exam.
- If Q0091 is billed in conjunction with an E&M code for the GYN exam, Q0091 will be processed as provider write-off. Allowance for the handling of the specimen using CPT 99000 will be denied as bundled when billed in conjunction with the GYN exam.
- We will consider Q0091 for payment, if billed with an E&M code using a diagnosis other than the GYN exam if modifier -25 is used with the E&M code. Diagnosis and chart notes must support use of the E&M code in conjunction with Q0091.
- If Q0091 is billed with an E&M code without modifier -25, Q0091 will not be approved and will be processed as provider write-off.

**11.5 Emergency Services**

PacificSource provides coverage without preauthorization for emergency medical conditions. This could include claims within a pre-existing (waiting) exclusion period and/or services not ordinarily covered on the plan.

Coverage includes emergency medical screening exams to determine the nature and extent of an emergency medical condition, emergency services provided in an emergency department and all ancillary services associated with the visit to the extent they are required for the stabilization of the patient.

Routinely, emergency room claims will be processed according to the information provided and benefits available to the member. Claims not approved are subject to automatic review by PacificSource.

See below for current contract definition of an Emergency Service.

“Emergency” shall mean a medical condition that manifests itself by acute symptoms of sufficient severity, including severe pain, that a prudent layperson possessing an average knowledge of health and medicine would reasonably expect that failure to receive immediate medical attention would place the health of a person, or a fetus in the case of a pregnant woman, in serious jeopardy.

“Emergency Services” shall mean those covered services that are medically necessary to treat emergency conditions.
Emergency Room Claims not Approved

In order to apply “prudent person” determination as mentioned above, all claims for services performed or provided in an emergency room setting (place of service code 23) will be reviewed prior to approval.

PacificSource will thoroughly review billing information for any indication that the member presented in the emergency room with what they perceived to be a medical emergency. If further information is needed, chart notes will be requested. Health Services will be consulted if clinical opinion becomes necessary.

Emergency and After-hours Codes Defined

(including but not limited to)

99050 Services provided in the office at times other than regularly scheduled office hours, or days when the office is normally closed, such as holidays or weekends.

*PacificSource Policy:* Claims submitted by an extended hours, urgent care, or immediate care facility must include supporting documentation to be allowed.

Claims submitted by an emergency department physician or provider will be processed as provider write-off.

99051 Services provided in the office during regularly scheduled evening, weekend, or holiday office hours.

*PacificSource Policy:* This CPT code will be denied to provider write-off regardless of documentation.

99053 Services provided between 10:00 p.m. and 8:00 a.m. at a 24-hour facility. This code is only allowed for Emergency departments and should not be billed by any other provider type.

*PacificSource Policy:* CPT code 99053 will not be approved and will be processed as provider write-off for the following reasons:

To account for the complexity and acute nature of the conditions being seen, the basic emergency room CPT already has a higher level of reimbursement built in as compared to a routine office visit CPT.

The emergency room provider is working his or her regular schedule, and therefore additional reimbursement for a late shift is not appropriate.

The basic facility charge billed with revenue code 450 includes the cost of maintaining a 24-hour facility, which would include staffing of medical providers and support staff.

99056 Services typically provided in-office, provided out of the office at the request of the patient.

*PacificSource Policy:* This code will not be paid and will be denied as patient responsibility.

99058 Services provided on an emergency basis in and out of the office, which disrupts other scheduled office services, in addition to the basic service.

*Criteria:* This CPT code will be denied up front. The provider may resubmit claims with documentation. Documentation will be reviewed and payment is not guaranteed.

*PacificSource Policy:* PacificSource will review any claim with this code to see if the situation falls under our emergency definition (see Emergency Services section). If so, the claim will be released for payment. If not, the charge will be processed as provider write-off unless supporting documentation is included.

99060 Service provided on an emergency basis out of the office, which disrupts other scheduled office services.

*PacificSource Policy:* This CPT code will be denied to provider write-off regardless of documentation.
11.6 Surgery

Bilateral Procedures

Bilateral surgeries are procedures performed on both sides of the body during the same operative session or on the same day. The terminology for some procedure codes includes the term “bilateral” or “unilateral or bilateral.”

If a procedure is not identified by CPT terminology as an inherently bilateral (unilateral or bilateral) procedure, the procedure should be reported with modifier 50.

Bilateral procedures should be billed as a separate charge line for each procedure, using a modifier on the second line. However, bilateral procedures may be billed on one line. Please see the examples below.

Example: Billed as one line (two services).

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<tr>
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<th>Modifier</th>
<th>Description</th>
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To ensure accurate payment, please make sure you bill the full billed amount, rather than the precut amount. Our system will not recognize if the claim has been precut, and it will cut again according to bilateral surgery guidelines.

Multiple Procedures

Multiple surgeries are separate procedures performed during the same operative session or on the same day, for which separate billing is allowed. Please be aware that this applies to both professional and hospital/facility charges:

- When multiple procedures, other than E&M services, are performed on the same day or at the same session by the same provider, the primary procedure or service should be reported as listed.
- Any additional procedures or services should be ranked in descending Relative Value Unit (RVU) order and identified by the use of modifier -51 on each additional procedure/service.
- Procedure codes that are classified as multiple procedures in the CMS Billing Manual will be processed according to our multiple procedure guidelines. If the code is modifier -51 exempt or an add-on code, it will be processed using 100 percent of the contracted allowed.
- Six or more procedures will require review by PacificSource and chart notes may be requested.

PacificSource uses the following payment structure for multiple procedure claims. Be sure to bill full charges for all services in order to receive the correct payment.

- Primary procedure: 100 percent of the fee allowance
- Second procedure: 50 percent of the fee allowance
- Third through fifth procedures: 25 percent of the fee allowance (Oregon and Washington, commercial only). Medicare and Medicaid only cut 100/50/50 (as does Idaho and Montana for Commercial).

To ensure accurate payment, please make sure when you are billing for multiple procedures that you submit the full billed amount, rather than the precut amount. Our system will not recognize the claim has been precut and will cut again according to the multiple surgery guidelines.
Multiple and Bilateral Surgical Procedures Performed in the Same Operative Session

Selected bilateral eligible services may also be subject to multiple procedure reductions when billed alone or with other multiple procedure reduction codes. When two or more procedure codes subject to reductions are performed on the same date of service and are subject to reduction as defined in the Federal register, only one of the procedure codes will be considered as the primary procedure, and all the remaining procedures will be considered secondary. The procedure with the highest CMS-based Relative Value Unit or contracted allowance, after the bilateral adjustment, as appropriate, will be considered the primary procedure.

Note: The bilateral procedure is not always the primary procedure. Assistant surgeon fees will be subject to multiple procedure reductions.

Idaho and Montana Examples

First bilateral procedure equals 150 percent of the fee schedule allowance or your billed charge, whichever is less.

Second bilateral procedure equals 75 percent of the fee schedule allowance (150% reduced by half) or your billed charge, whichever is less.

Please note: If the bilateral procedures are billed on two separate lines on the claim, the reduction will be split evenly between both lines.

- **When billing two bilateral procedures:**
  - Primary bilateral = 150 percent of the fee schedule allowance for the procedure
  - Secondary bilateral = 75 percent of the fee schedule allowance for the procedure;
    150 percent X 50 percent = 75 percent

- **When billing a primary, nonbilateral procedure and a secondary bilateral procedure:**
  - Primary procedure = 100 percent of the fee schedule allowance for the procedure
  - Secondary bilateral procedure = 75 percent of the fee schedule allowance for the procedure;
    150 percent X 50 percent = 75 percent

- **When billing a primary bilateral procedure and a secondary procedure:**
  - Primary bilateral = 150 percent of the fee schedule allowance for the procedure
  - Secondary procedure = 50 percent of the fee schedule allowance for the procedure

<table>
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<tr>
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<td>$1,100.00</td>
<td>$975.00</td>
<td>X 50%</td>
<td>$487.50</td>
</tr>
</tbody>
</table>

For this example, the primary procedure is 31255-50 and allowed at 150 percent of the fee schedule allowance or billed charges, whichever is less. All remaining procedures are allowed at 50 percent of the fee schedule allowance.

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Billed</th>
<th>Contract allowed</th>
<th>Modifier</th>
<th>Considered allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>30140-51, 50</td>
<td>$1,200.00</td>
<td>$500.00</td>
<td>150% X 50%</td>
<td>$375.00</td>
</tr>
<tr>
<td>30520</td>
<td>$2,950.00</td>
<td>$2,500.00</td>
<td>Primary @ 100%</td>
<td>$2,500.00</td>
</tr>
<tr>
<td>31200-51</td>
<td>$975.00</td>
<td>$900.00</td>
<td>X 50%</td>
<td>$450.00</td>
</tr>
</tbody>
</table>
For this example, the primary procedure is 30520 and allowed at 100 percent of the fee schedule allowance. The secondary procedure is 30140-50 and allowed at 150 percent X 50 percent resulting in a reimbursement of 75 percent of the fee schedule allowance. The third procedure, 31200, is allowed at 50 percent of the fee schedule allowance.

**Oregon Examples**

First bilateral procedure equals 150 percent of the fee schedule allowance or your billed charge, whichever is less.

Second bilateral procedure equals 50 percent of the fee schedule allowance (25% X 2) or your billed charge, whichever is less.

Please note: If the bilateral procedures are billed on two separate lines on the claim, the reduction will be split evenly between both lines.

- **When billing two bilateral procedures:**
  - Primary bilateral = 150 percent of the fee schedule allowance for the procedure
  - Secondary bilateral = 25 percent of the fee schedule allowance for the procedure; 25 percent X 2 = 50 percent

- **When billing a primary, nonbilateral procedure and a secondary bilateral procedure:**
  - Primary procedure = 100 percent of the fee schedule allowance for the procedure
  - Secondary bilateral procedure = 75 percent of

For this example, the primary procedure is 31255-50 and allowed at 150 percent of the fee schedule allowance or billed charges, whichever is less. All remaining procedures are allowed at 50 percent of the fee schedule allowance.

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Billed</th>
<th>Contract allowed</th>
<th>Modifier</th>
<th>Considered allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>31255-50</td>
<td>$4,000.00</td>
<td>$2,100.00</td>
<td>X 150%</td>
<td>$3,150.00</td>
</tr>
<tr>
<td>31276-51</td>
<td>$1,100.00</td>
<td>$975.00</td>
<td>X 25%</td>
<td>$243.75</td>
</tr>
<tr>
<td>31267-51</td>
<td>$1,100.00</td>
<td>$975.00</td>
<td>X 25%</td>
<td>$243.75</td>
</tr>
</tbody>
</table>

For this example, the primary procedure is 31255-50 and allowed at 150 percent of the fee schedule allowance or billed charges, whichever is less. All remaining procedures are allowed at 50 percent of the fee schedule allowance.

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Billed</th>
<th>Contract allowed</th>
<th>Modifier</th>
<th>Considered allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>30140-51, 50</td>
<td>$1,200.00</td>
<td>$500.00</td>
<td>150% X 50%</td>
<td>$375.00</td>
</tr>
<tr>
<td>30520</td>
<td>$2,950.00</td>
<td>$2,500.00</td>
<td>Primary @ 100%</td>
<td>$2,500.00</td>
</tr>
<tr>
<td>29881-51</td>
<td>$975.00</td>
<td>$900.00</td>
<td>X 25%</td>
<td>$225.00</td>
</tr>
</tbody>
</table>

For this example, the primary procedure is 30520 and allowed at 100 percent of the fee schedule allowance. The secondary procedure is 30140-50 and allowed at 150 percent X 50 percent resulting in a reimbursement of 75 percent of the fee schedule allowance. The third procedure, 29881, is allowed at 25 percent of the fee schedule allowance.
Payment Rules for Multiple Scope Procedures

**Related Scope Procedures:** Scope surgeries are related procedures (same code family) performed during the same operative session and through the same body orifice/incision on the same day.

The scope with the highest RVU is allowed at 100 percent of the fee allowance.

The second and subsequent procedures are priced by subtracting the fee allowance for the “base” procedure from the code’s usual fee allowance.

**Unrelated Scope Procedures:** When the Scope Procedures are unrelated (not in the same family), multiple surgery rules will apply instead.

**Related and Unrelated Scope Procedures on the same day:** First, the related scope procedure rule applies, and if the scope is determined to be unrelated then the multiple surgery rule will apply.

Ambulatory Surgery Center (ASC) Billing and Payment Guidelines

When contracting directly with an Ambulatory Surgery Center (ASC), PacificSource contracts using various payment methodologies. Please refer to your provider agreement for specifics.

For codes that do not have an ASC allowed amount published by CMS, PacificSource will establish such values for its maximum rate determination.

The ASC fee schedule is modeled after the Outpatient Prospective Payment System (OPPS). ASC rules for the application of modifier 50/51 are different from CPT standard.

When submitting a claim for multiple procedures, submit the primary procedure as the first procedure code. Use modifier 51 in the first modifier position on subsequent procedures, including exempt and add-on codes. If modifier 51 is missing on secondary and subsequent procedures that should be stepped down, PacificSource may deny the claim as billed in error and request a correction or a modifier 51 to be appended to indicate multiple procedures.

Please note: PacificSource requires the use of Modifier SG to expedite processing.

**Commercial (Idaho and Montana ONLY) and Medicare Examples**

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Billed</th>
<th>Contract allowed</th>
<th>Modifier</th>
<th>Considered allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>31255-SG-50</td>
<td>$3,000.00</td>
<td>$1,100.00</td>
<td>150%</td>
<td>$16,500.00</td>
</tr>
<tr>
<td>30520-51-SG</td>
<td>$1,000.00</td>
<td>$900.00</td>
<td>X 50%</td>
<td>$450.00</td>
</tr>
<tr>
<td>30140-51-SG-50</td>
<td>$1,200.00</td>
<td>$450.00</td>
<td>X 75%</td>
<td>$337.00</td>
</tr>
</tbody>
</table>

For this example, the primary bilateral procedure is 31255-50 and allowed at 150% of the fee schedule allowance or billed charges, whichever is less. The secondary bilateral procedure is 30140-50-51 and is allowed at 75% of the fee schedule allowance or billed charges, whichever is less. All remaining procedures are allowed at 50% of the fee schedule allowance or billed charges, whichever is less. Exempt and add-on codes will not be subject to MPR.

**Commercial (all locations except Idaho and Montana) Examples**

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Billed</th>
<th>Contract allowed</th>
<th>Modifier</th>
<th>Considered allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>31255-51-SG-50</td>
<td>$3,000.00</td>
<td>$1,100.00</td>
<td>X 150%</td>
<td>$1,650.00</td>
</tr>
<tr>
<td>30520-51-SG</td>
<td>$1,000.00</td>
<td>$900.00</td>
<td>X 25%</td>
<td>$225.00</td>
</tr>
<tr>
<td>30140-51-SG-50</td>
<td>$1,200.00</td>
<td>$450.00</td>
<td>X 50%</td>
<td>$225.00</td>
</tr>
</tbody>
</table>
For this example, the primary bilateral procedure is 31255 and will be reimbursed at 150% of the fee schedule allowance or billed charges, whichever is less. The secondary bilateral procedure is 30140-51-50 and is allowed at 50% of the fee schedule allowance or billed charges, whichever is less. All remaining procedures are allowed at 25% of the fee schedule allowance or billed charges, whichever is less. All procedures are eligible for MPR, including exempt and add-on codes.

**Surgical Assistant Guidelines for Commercial Health Plans.**

Payment is made only if an assistant surgeon is allowed on the Federal Register.

**Modifier 80—Assistant Surgeon (MD, DMD, DDS, DO)**

The allowance for modifier 80 is 20 percent of the surgery CPT allowance.

**Modifier 81—Minimum Assistant Surgeon (MD, DMD, DDS, DO)**

- The allowance for modifier 81 is ten percent of the surgery CPT allowance.
- This modifier is used when the doctor performed minimal assistance.

**Modifier 82—Assistant Surgeon:**

This modifier is used when a qualified resident surgeon is not available. This is a rare occurrence. The fee allowance is automatically reduced to 20% of the surgical fee allowance as billed by the primary surgeon.

**Modifier AS—Nonphysician Assistant (PA, RN, CRNFA, CST, CNM)**

The allowance for modifier AS is ten percent of the surgery CPT allowance.

To ensure accurate payment, please make sure when you are billing assistant surgeon claims that you submit the full billed amount, rather than the precut amount. Our system will not recognize that the claim has been precut (adjusted to show the assistant surgeon payment percentage), and it will be cut again according to the assistant surgeon guidelines.

Please note: Certified Nurse First Assist, Certified First Assist (CFS), Certified Surgical Technicians, Surgical Assistants, and Registered Nurse cannot bill independently. These providers must bill under the overseeing doctor’s tax identification number (see Taxpayer Identification Number section).

**Office Surgery Suites and Fees**

**Change effective October 1, 2019:** CMS establishes relative value units (RVU) for CPT and HCPCS codes that include the cost of running an office (e.g. rent, equipment, supplies, and nonphysician staff costs), which are referred to as the practice expense RVU. These expenses should not be separately reported. PacificSource will not reimburse any service appended with modifier SU or FF. Those modifiers will be processed to provider write-off.

Prior to October 1, 2019: PacificSource allowed the use of an office surgery suite for surgical procedures not requiring hospital outpatient or ambulatory surgery center admission. The allowance for an office surgical suite is calculated according to the relative value of the surgical procedure.

To be eligible for payment, the provider must include office/surgical suite charges when billing the surgery to PacificSource. To expedite these claims, surgical suite should be identified by the use of modifier SU.

For surgical procedures performed in the office, the following table will be used to calculate the PacificSource surgical suite allowance when a provider contract does not state specific surgical suite allowances.
### RBRVS Surgical Relative Value Unit

<table>
<thead>
<tr>
<th>RBRVS Surgical Relative Value Unit</th>
<th>% of PacificSource Surgical Allowance</th>
</tr>
</thead>
<tbody>
<tr>
<td>00.01 through 02.09</td>
<td>Billed</td>
</tr>
<tr>
<td>02.10 through 08.75</td>
<td>40%*</td>
</tr>
<tr>
<td>08.76 through 14.60</td>
<td>30%*</td>
</tr>
<tr>
<td>14.61 and greater RVUs</td>
<td>25%*</td>
</tr>
</tbody>
</table>

*Percentage is based on PacificSource allowance for the surgical procedure(s), not the amount billed.

The surgical suite allowance includes usage of room, lights, cautery, dressings, sutures, sterile tray, optical or other equipment, and any services of an assistant (e.g., MD, RN, PA). If any of these supplies are billed separately, it will be processed to provider write-off. Surgical Suite reimbursement will only be allowed if there is a dedicated room or space in which surgical procedures are performed. Service done in an exam room or area that is utilized for dual purposes will not be considered a surgical suite and will be denied.

### Medicare: Multiple and Bilateral Procedures Performed during the Same Operative Session

When a bilateral procedure code and surgical procedure code(s) are submitted together and both the bilateral and surgical procedure code(s) are eligible for multiple procedure reduction, the bilateral adjustment will be applied first. The surgical procedure code(s) with the highest allowable compensation, after the bilateral adjustment, will be compensated at contract benefit. Other surgical procedure code(s) subject to reduction logic as stated above per state and are compensated at either 50 percent or 25 percent of the allowed amount, after bilateral adjustment, as appropriate.

- 1st bilateral procedure = 150 percent of the fee schedule allowance or your billed charge, whichever is less.
- 2nd bilateral procedure = 150 percent x 50 percent = 75 percent of the fee schedule allowance or your billed charge, whichever is less.

**Please note:** If the bilateral procedures are billed on two separate lines, the reduction will be split evenly between both lines.

#### When Billing Two Bilateral Procedures:

- Primary bilateral = 150 percent of the fee schedule allowance for the procedure
- Secondary bilateral = 75 percent of the fee schedule allowance for the procedure; 150 percent x 50 percent = 75 percent

#### When Billing a Primary, Nonbilateral Procedure and a Secondary Bilateral Procedure:

- Primary procedure = 100 percent of the fee schedule allowance for the procedure
- Secondary bilateral procedure = 75 percent of the fee schedule allowance for the procedure; 150 percent x 50 percent = 75 percent

#### When Billing a Primary Bilateral Procedure and a Secondary Procedure:

- Primary bilateral = 150 percent of the fee schedule allowance for the procedure
- Secondary procedure = 50 percent of the fee schedule allowance for the procedure

### Example of Billed Procedures:

- 31255-50
- 31276-51
- 31267-51

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For the above example, the primary procedure is 31255-50 and allowed at 150 percent of the fee schedule allowance or billed charges, whichever is less. All remaining procedures are allowed at 50 percent of the fee schedule allowance.

### 11.7 Colonoscopy

**Screening colonoscopies:** Colonoscopy screenings will be covered at 100 percent for ages 50-75 when billed by an in-network provider.

**Medical colonoscopies** for members under age 50 or when billed with a medical diagnosis will be paid under the surgery benefit. The facility claim will be paid under the outpatient facility or ambulatory surgery center benefit.

**CT or MR colonography,** also known as “virtual colonoscopy” is not covered and is considered as Experimental/Investigational.

**Preauthorization:** Colonoscopies do not require prior authorization on group or individual policies.

**Colonoscopy with E&M:** If a provider bills a colonoscopy with an Evaluation and Management service and the diagnosis is for screening, the E&M service will be denied to provider write-off regardless of in-network status.

**Visits prior to the diagnostic exam:** Previsits prior to a screening colonoscopy are inclusive and are reflected in the RVU for the colonoscopy.

### 11.8 Evaluation and Management (E&M) Billing Guidelines

**Preventive Visits and E&M Billed Together**

According to the CPT codebook, it is appropriate to bill for both preventive services and evaluation and management (E&M) services during the same visit only when significant additional services or counseling are required.

**Appropriate Use of CPT Code 99211**

Because the appropriate use of CPT code 99211 is often confusing, we offer the following guidelines. According to the CPT Code Book, 99211 is intended for “an office or other outpatient visit for the evaluation and management of an established patient that may not require the presence of a physician.”

The key points to remember regarding 99211 are:

- The service must be for evaluation and management (E&M).
- The patient must be established, not new (see Distinction Between New and Established Patients).
- The service must be separated from other services performed on the same day.
- The provider-patient encounter must be face-to-face, not via telephone.

Code 99211 will be accepted only when documentation shows that services meet the minimum requirements for an E&M visit. For example, if the patient receives only a blood pressure check or has blood drawn, 99211 would not be appropriate. All E&M office visits follow the member’s office visit benefit; therefore, if another CPT code more accurately describes the service, that code should be reported instead of 99211.
Anticoagulant Management Codes

Anticoagulant services are defined as the outpatient management of warfarin therapy. This includes communication with the patient, International Normalized Ratio (INR) testing (ordering, review, and interpretation), and dosage adjustments as appropriate.

The following codes and guidelines should be applied for anticoagulant management:

- 99363—Initial 90 days of therapy (must include a minimum of eight INR measurements). Submit claim for 99363 after the eighth visit has been completed.
- 99364—Submit claims for 99364 after each additional 90 days of therapy (must include a minimum of three INR measurements).
- Do not bill 99211 with 99363 or 99364 unless a significant, separately identifiable E&M service is performed and documentation can support it. 99211 will be processed to provider write-off when billed in place of 99363 or 99364.

Anticoagulant management work itself is not a basis for an E&M service code or Care Plan Oversight time during the reporting period. Codes 99371—99373 and 0074T do not apply with telephone or online services. However, if a significant, separately identifiable E&M service is performed, report the appropriate E&M service code using modifier 25.

For more information on the use of these codes, please refer to your CPT book.

Distinction Between New and Established Patients

The American Medical Association (AMA) defines a new patient as one who has not received professional services from the physician (or another physician of the same specialty who belongs to the same group practice), within the past three years. Conversely, an established patient is one who has received face to face professional services within the past three years.

Please be aware of this distinction when billing new patient CPT codes.

Ambulatory Surgery Center (ASC) Payment Guidelines

When contracting directly with an Ambulatory Surgery Center (ASC), PacificSource contracts using various payment methodologies. Please refer to your provider agreement for specifics.

For codes that do not have an ASC allowed amount published by CMS, PacificSource will establish such values for its maximum rate determination.

The SG modifier must be used to bill services provided in an ASC.

The ASC fee schedule is modeled after the Outpatient Prospective Payment System (OPPS). ASC rules for modifier 50/51 application are different from CPT standard.

When submitting a claim for multiple procedures, submit the primary procedure as the first procedure code. Use modifier 51 in the first modifier position and subsequent procedures including exempt and add on codes. If modifier 51 is missing on secondary and subsequent procedures that should be stepped down, PacificSource may deny the claim as billed in error and request a correction or a modifier 51 to be appended to indicate multiple procedures.

Example: Billed Procedures
- 31255-RT
- 31255-51-LT
- 30520–51
• 30140-51-RT
• 30140-51-LT

For the above example, the primary procedure is 31255-RT and allowed at 100 percent of the fee schedule allowance, or billed charges, whichever is less. All remaining procedures are allowed at 50 percent of the fee schedule allowance.

Services included in the ASC Facility Payment:

Nursing services, services of technical personnel, and other related services: These services include any nurses, orderlies, technical personnel, and others involved in patient care.

Patient use of the ASC facilities: Use of the operating room, recovery room, patient prep areas, waiting room, and other areas used by the patient or offered for use to the patient’s relatives in connection with the procedure are all included within the facility payment.

Drugs and biologicals: These include drugs or biologicals commonly furnished by the ASC in connection with surgical procedures. It is limited to those items that cannot be self-administered.

Surgical dressings: This includes primary surgical dressings applied at the time of the surgery, and therapeutic and protective coverings applied to lesions or openings in the skin that were required for the surgical procedure. (Ace bandages, pressure garments, Spence boots, and similar items are considered secondary dressings.) Surgical dressings for reapplication by the patient or other caregiver obtained on a provider’s order from a supplier, i.e., drugstore, are not included in the facility payment and are separately reimbursable to the supplier.

Supplies, splints, and casts: Only those supplies, splints and casts applied at the time of surgery are included in the facility fee. However, such items furnished later are generally furnished “incident to” a physician’s service and are not an ASC facility service. Items provided “incident to” a provider’s services are subject to other regulations and definitions, and are generally included in the provider fee. Supplies include all those required for the patient or ASC personnel, such as gowns, drapes, masks, and scalpels.

Appliances and equipment: Appliances and equipment used within the surgical procedure are included within the facility payment. However, prosthetics and orthotics (other than IOLs) are not included and will be separately reimbursed. IOLs are included in the facility payment. DME furnished to the patient is separately reimbursable to enrolled DME providers.

Diagnostic or therapeutic items and services: Diagnostic services performed by the ASC may be included in the ASC facility payment. However, if the laboratory of the ASC is not certified, items such as routine simple urinalysis or hemograms should not be billed. Tests performed by a certified ASC laboratory are billed by the laboratory and are separately reimbursable. Similarly, tests performed under an arrangement with an independent or hospital laboratory are billed directly by the provider. Radiology, EKGs, and other preoperative tests are generally not included in the facility payment when used to determine the suitability of an ASC setting. Other diagnostic and therapeutic tests directly connected to the procedure are included in the facility payment.

Administrative, recordkeeping, and housekeeping items and services: These include administrative functions necessary to run the facility.

Materials for anesthesia: These include any supplies, drugs, or gases are included within the facility payment.

Unless otherwise noted in your agreement, PacificSource will not pay for services or supplies specifically outlined by CMS as included in the Case Rate, or in which CMS has deemed nonreimbursable. These can be found on the CMS Web page at
Services not Included in the ASC Facility Payment

- Physician services: This includes services of anesthesiologists administering or supervising the administration of and recovery from anesthesia. Physician services also include any routine pre- or postoperative services, such as office visits, consultations, diagnostic tests, removal of stitches, changing of dressings, and other services that the individual physician usually includes in a set global fee for a given surgical procedure.

- DME: Includes items for the sale, lease, or rental to ASC patients for use in their home.

- Prosthetic and orthotic devices; and leg, arm, back, and neck braces (except IOLs).

- ASC furnished ambulance services.

- Diagnostic tests performed directly by an ASC.

- Physical and occupational therapy services.

Prolonged Physician Service

Chart notes are required for prolonged services. If chart notes are not received, the claim will be processed as provider write-off with the explanation code stating that supporting documentation is required.

See the CMS website for the threshold table.

11.9 Medicare: Annual Wellness Visit (AWV)

As a result of the Affordable Care Act (healthcare reform law), CMS extended the preventive focus of Medicare coverage to include an Annual Wellness Visit that focuses on establishing a Personalized Prevention Plan. The benefit is available as of January 1, 2011.

Who is eligible to receive an AWV?

A Medicare beneficiary who:

- Has been receiving Medicare Part B benefits for at least 12 months, and
- Has not had an Initial Preventive Physical Examination (IPPE) also known as “Welcome to Medicare” exam within the past 12 months

*Please have your staff contact PacificSource Medicare Customer Service at (541) 385-5315 to verify eligibility prior to scheduling the patient’s AWV.*

Who is eligible to provide an AWV?

- A physician who is a doctor of medicine or osteopathy
- A physician assistant, nurse practitioner, or clinical nurse specialist
- A medical professional (including a health educator, registered dietitian, or nutrition professional or other licensed practitioner)
What is the patient’s responsibility?

There is no cost for this visit. However, a copay or deductible may apply for any additional testing. It is important to note health education and counseling services provided by a referred doctor may not be covered. Please have your patient refer to their member handbook or contact Customer Service to verify coverage.

What does the initial AWV cover?

- Establish or update the patient’s medical and family history.
- Record measurements of height, weight, body mass index, blood pressure and other routine measurements deemed necessary based off the patient’s medical/family history.
- Establish a list of current medical providers/suppliers involved in the patient’s care.
- Detection of any cognitive impairment.
- Review of potential risk factors for depression.
- Review of functional ability and level of safety based on direct observation or screening questionnaire.
- Establishment of a written screening schedule, such as a checklist for the next five to ten years, in regards to age appropriate preventive services.

Furnish personal health advice and coordinate appropriate referrals and health education, when necessary.

What does the subsequent AWV cover?

- Update the patient’s medical and family history.
- Record measurements of height, weight, body mass index, blood pressure, and other routine measurements deemed necessary based off the patient’s medical/family history.
- Update the list of current medical providers/suppliers involved in the patient’s care.
- Detection of any cognitive impairment.
- Update the written screening schedule.
- Update to the list of risk factors.
- Furnish personal health advice and coordinate appropriate referrals and health education, when necessary.

Is the Annual Wellness Visit the same as an annual physical exam?

The AWV is not an annual physical exam. The AWV is a comprehensive exam, which focuses on preventive care by establishing a Personalized Preventive Plan.

Is the Annual Wellness Visit the same as the Welcome to Medicare Exam?

Both exams are similar in benefits; however the Welcome to Medicare is only available to those members who are within their first 12 months of being Medicare eligible.

What procedure codes are used to bill for the AWV?

HCPCS codes:

- Initial AWV with PPPS: G0438 - Annual wellness visit, includes a personalized prevention plan of service (PPPS), first visit.
• Subsequent AWV with PPPS: G0439 - Annual wellness visit, includes a personalized prevention plan of service (PPPS), subsequent visit.

Is the Initial AWV Code (G0438) a once in a lifetime benefit?
Yes, the Initial visit code G0438 is for the patient’s first AWV only. Submission of G0438 for a patient who has already incurred their initial AWV will result in a denial.

Please verify whether or not the patient has received their initial AWV prior to scheduling their appointment.

Can a patient select a new healthcare professional to provide their subsequent AWV?
Yes. In the event a patient selects a new healthcare professional for their subsequent AWV, the new healthcare professional must bill the subsequent AWV code G0439.

Remember, the G0438 and G0439 must not be billed within 12 months of a previous billing for the same patient.

How should we bill PacificSource Medicare if the minimum requirement for an AWV is not met? Can we bill with a modifier 52?
If the documentation for the services rendered does not meet criteria to bill G0438 or G0439, please bill with the appropriate CPT/HCPC code that best identifies the service(s) provided.

Also, claims submitted for these services with a modifier 52 appended are not accepted as CMS does not allow the procedure code and modifier combination.

Can a provider bill a medically necessary Evaluation and Management (E&M) service in conjunction with an AWV?
Medicare will allow a significant and separately identifiable evaluation and management (E&M) service on the same date as the AWV when it is reported with a modifier 25. However, CMS recommends against providing nonurgent acute care at the same encounter, as it may detract the intended focus on preventive care. Please note, documentation must support both services.

How do I bill for AWV services on a UB04 form?
Institutional providers need to submit these claims via Types of Bill (TOB) 12X, 13X, 22X, 23X, 71X, 77X, or 85X. Institutional providers will be paid as follows:

• For services performed on a 12X TOB and 13X TOB, hospital inpatient Part B and hospital outpatient, payment shall be made under the MPFS.
• For TOBs 22X and 23X, skilled nursing facilities will be paid based on the MPFS.
• Rural Health Clinics (TOB 71X) and Federally Qualified Health Centers (TOB 77X) will be paid based on the all-inclusive rate.
• For services performed on an 85X TOB, Critical Access Hospital (CAH), pay based on reasonable cost.
• CAHs claims (submitted on TOB 85X with revenue codes 096X, 097X, and 098X) will be paid based on MPFS.
11.10 Ultrasound: Same-day Billing of Transvaginal and Standard

Our claims editing system recommends the denial of payment for transvaginal ultrasound when billed with any pelvic or abdominal ultrasound on the same date of service. After careful review, PacificSource has decided to cover both, but will reduce payment the transvaginal ultrasound by 50 percent when billed in conjunction with another ultrasound.

11.11 Never Events Policy

PacificSource has determined that if a healthcare service is deemed a “never event” that neither PacificSource nor the Member will be responsible for payments for said services.

Healthcare facilities and providers will not seek payment from PacificSource Medicare or its members for additional charges directly resulting from the occurrence of such a “never event” if:

- The event results in an increased length of stay, level of care, or significant intervention
- An additional procedure is required to correct an adverse event that occurred in the previous procedure or provision of a healthcare service
- An unintended procedure is performed
- Re-admission is required as a result of an adverse event that occurred in the same facility
- These guidelines do not apply to the entire episode of care, but only the care made necessary by the serious adverse event.

Surgical Events

Pursuant to the above guidelines, a healthcare facility or provider will not seek payment for costs directly resulting from the occurrence of the following events:

- Surgery performed on the wrong body part
- Surgery performed on the wrong patient
- Wrong surgical procedure on a patient
- Retention of a foreign object in a patient after surgery or other procedure
- Intraoperative or immediately post-operative death in an otherwise healthy patient (defined as a Class 1 patient for purposes of the American Society of Anesthesiologist patient safety initiative).

Product or Device Events

Pursuant to the above guidelines, a healthcare facility or provider will not seek payment for costs directly resulting from the occurrence of the following events:

- Patient death or serious disability associated with the use of contaminated drugs, devices, or biologicals provided by the healthcare facility
- Patient death or serious disability associated with the use or function of a device in patient care in which the device is used or functions other than as intended
- Patient death or serious disability associated with intravascular air embolism that occurs while being cared for in a healthcare facility
Patient Protection Events

Pursuant to the above guidelines, a healthcare facility or provider will not seek payment for costs directly resulting from the occurrence of the following events:

- Patient death or serious disability associated with a hemolytic reaction due to the administration of ABO/HLA-incompatible blood or blood products.
- Patient death or serious disability associated with a medication error (e.g., errors involving the wrong drug, wrong dose, wrong patient, wrong time, wrong rate, wrong preparation, or wrong route of administration).
- Maternal death or serious disability associated with labor or delivery on a low-risk pregnancy while being cared for in a healthcare facility.
- Patient death or serious disability associated with hypoglycemia, the onset of which occurs while the patient is being cared for in a healthcare facility.
- Death or serious disability (kernicterus) associated with failure to identify and treat hyperbilirubinemia in neonates.
- Stage 3 or 4 pressure ulcers acquired after admission to a healthcare facility.
- Patient death or serious disability due to spinal manipulation therapy.
- Patient death or serious disability associated with an electric shock or elective cardioversion while being cared for in a healthcare facility.
- Patient death or serious disability associated with a fall while being cared for in a healthcare facility.
- Patient death or serious disability associated with a burn incurred from any source while being cared for in a healthcare facility.
- Patient death or serious disability associated with the use of restraints or bedrails while being cared for in a healthcare facility.

The formulation of this policy is the result of guidelines established by the Centers for Medicare and Medicaid (CMS), Oregon Association of Hospitals and Health Systems, Oregon Patient Safety Commission, and the National Quality Forum.

Environmental Events

Pursuant to the above guidelines, a healthcare facility or provider will not seek payment for costs directly resulting from the occurrence of the following events:

- Patient death or serious disability associated with an electric shock or elective cardioversion while being cared for in a healthcare facility
- Incident in which a line designated for oxygen or other gas to be delivered to a patient contains the wrong gas or is contaminated by toxic substances
- Patient death or serious disability associated with a fall while being cared for in a healthcare facility
- Patient death or serious disability associated with a burn incurred from any source while being cared for in a healthcare facility
- Patient death or serious disability associated with the use of restraints or bedrails while being cared for in a healthcare facility

The formulation of this policy is the result of guidelines established by the Centers for Medicare and Medicaid (CMS), Oregon Association of Hospitals and Health Systems, Oregon Patient Safety Commission, and the National Quality Forum.
11.12  **Routine Venipuncture and/or Collection of Specimens**

Venipuncture or phlebotomy is the puncture of a vein with a needle or an IV catheter to withdraw blood. Venipuncture is the most common method used to obtain blood samples for blood or serum lab procedures, and is sometimes referred to as a “blood draw.” The work of obtaining the specimen sample is an essential part of performing the test.

Reimbursement for the venipuncture is included in the reimbursement for the lab test procedure code.

Collection of capillary blood specimen or a venous blood from an existing line or by venipuncture that does not require a physician’s skill or a cutdown is considered “routine venipuncture.”

**Professional and Clinical Laboratory Services**

Venipuncture is the most common method used to obtain blood samples for blood or serum lab procedures. The work of obtaining the specimen sample is an essential part of performing the test.

Reimbursement for the venipuncture is included in the reimbursement for the lab test procedure code.

Venipuncture is only eligible to be billed once, even when multiple specimens are drawn or when multiple sites are accessed in order to obtain adequate specimen size for the desired test(s).

PacificSource does not allow separate reimbursement for venipuncture when billed in conjunction with the blood or serum lab procedure performed on the same day and billed by the same provider will be denied as a subset to the lab test procedure.

If some of the blood and/or serum lab procedures are performed by provider and others are sent to an outside lab, venipuncture is not eligible for separate reimbursement.

The use of modifier 59 with venipuncture when blood/serum lab tests are also billed is not a valid use of the modifier. The venipuncture is not a separate procedure in this situation.

PacificSource does allow separate reimbursement for venipuncture when the only other lab services billed for that date by that provider are for specimens not obtained by venipuncture (e.g., urinalysis).

Collection of a capillary blood specimen is designated as a status B code (bundled and never separately reimbursed) on the Physician Fee Schedule RBRVU file. PacificSource clinical edits will deny a collection of a capillary blood specimen whether it is billed with another code or as the sole service for that date. This edit is not eligible for a modifier bypass.

11.13  **Inpatient Hospital Services**

A maximum of one collection fee (any procedure code) is allowed per specimen type (venous blood, arterial blood) per date of service, per CMS policy. Specimen collections out of an existing line (arterial line, CVP line, port, etc.) are not separately reimbursable.
11.14 **Lab Handling Codes**

The following procedure has been updated to follow PacificSource claims editing software:

**Lab Handling Codes**

- **36415**—Collection of venous blood by venipuncture.
  - Our claims editing system may deny as unbundled when billed with any E&M, lab or other procedure codes.
- **36416**—Collection of capillary blood specimen.
  - Our claims editing system may deny as unbundled when billed with any E&M, lab or other procedure codes.
- **99000**—Handling and/or conveyance of specimen for transfer from physician’s office to a lab.*
  - These codes (99000, 99001, and 99002) will deny as unbundled when billed with an E&M code.
- **99001**—Handling and/or conveyance of specimen for transfer from the patient in other than a physician’s office to a laboratory.*
  - These codes (99000, 99001, and 99002) will deny as unbundled when billed with an E&M code.
- **99002**—Handling, conveyance, and/or any other service in connection with implementation of an order involving devices (e.g., designing, fitting, packaging, handling, delivering, or mailing) when devices such as orthotics, protectives, or prosthetics are fabricated by an outside laboratory or shop but which items have been designed, and are to be fitted and adjusted by the attending physician.*

*These codes (99000, 99001, and 99002) will deny as unbundled when billed with an E&M code.

11.15 **Clinical Lab Services**

PacificSource Health Plans follows Medicare guidelines for billing of professional, technical, and total components of laboratory tests. Please note, these codes are subject to change based on the National Physician Fee Schedule Relative Value File updates. We will not make separate payment for the pathologist’s professional services in the hospital.

11.16 **Editing Software for Facility and Professional Claims**

PacificSource utilizes claims editing software for medical claims. Using the software helps to promote correct coding and standardized editing of the claims we receive on behalf of our members.

The coding guidelines contained in the knowledge base are well researched, clearly defined and documented in support of transparency requirements. We apply these guidelines to both in-network and out-of-network professional providers. Edits made to claims are considered to be a provider adjustment and not billable to the member.

- PacificSource Health Plans utilizes the OPTUM CES Facility and Professional Editing application.
- PacificSource Community Solutions utilizes the Clinical Integration Manager system.
- PacificSource Medicare utilizes the Ingenix iCES Professional Editing application.

**Sample Edit Criteria**

Listed below are some examples and definitions of edits that providers/facilities may encounter.

**Mutually Exclusive:** Mutually exclusive codes are those codes that cannot reasonably be done in the same session, or the coding combination represents two methods of performing the same service.
Incidental: Includes procedures that can be performed along with the primary procedure, but are not essential to complete the procedure. They do not typically have a significant impact on the work and time of the primary procedure. Incidental procedures are not separately reimbursable when performed with the primary procedure.

OCE/CCI: Based on coding conventions defined in the AMAs CPT Manual, current standards of medical and surgical coding practice, input from specialty societies, and analyses of current coding practice. Edits always consist of pairs of HCPCS codes using the correct coding edits table and the mutually exclusive edit table.

MUE Hospital: Unlikely number of units billed for services rendered. [www.cms.gov/Medicare/Coding/NationalCorrectCodInitEd/MUE.html](http://www.cms.gov/Medicare/Coding/NationalCorrectCodInitEd/MUE.html)

Multiple/Bilateral procedures without modifier: Any instance when a claim is submitted for primary surgery along with additional surgery codes for either multiple procedures and/or bilateral procedures without appropriate modifier.

Unbundling: Procedure code that is a component of the primary procedure code. [www.cms.gov/Medicare/Coding/NationalCorrectCodInitEd/NCCI-Coding-Edits.html](http://www.cms.gov/Medicare/Coding/NationalCorrectCodInitEd/NCCI-Coding-Edits.html)

Revenue Code requires HCPCS code (Pairing): Any instance where a revenue code requires the HCPCS code to be billed for payment.

Inpatient only procedures: Procedure codes that can only be performed in an inpatient setting.

11.17 Vision—Routine vs. Medical

PacificSource offers routine vision benefits, including hardware, as an endorsement to Group policies. Vision endorsements contain maximum dollar benefits and time limitations. Refer to plan documents for specific benefit limitations.

11.18 Telehealth or Telemedicine

General Guidelines and Information

- This is a general reference regarding PacificSource's reimbursement policy for the services described and is not intended to address every reimbursement situation.
- PacificSource recognizes federal and state mandates in regards to Telehealth and Telemedicine. Any terms not otherwise defined in this policy is directed by the federal and state mandates.
- Other factors affecting reimbursement may supplement, modify or supersede this policy which include, but are not limited to the following:
  - Legislative mandates
  - Provider contracts
  - Benefit and coverage documentation
  - Other medical or drug policies
- This policy may not be implemented exactly the same way as written due to system constraints and limitations, however, PacificSource will attempt to limit these discrepancies.
- Services are subject to medical necessity, evidence-based protocols, and member’s eligibility and benefit at time of service.
Commercial Coverage Criteria:

Criteria for Tele-Video and Telephonic Services

Preauthorization to use a telehealth service is not required unless the service requires preauthorization when performed in-person.

Services must meet all of the following in order to qualify for coverage under the health plan:

- Limited to two-way real time video and phone communication as defined by state and/or federal mandates.
- Services must be medically necessary and eligible for coverage Providers and originating site must be eligible for reimbursement.
- Telemedical video and telephonic communication and other consultation services are subject to all terms and conditions of the plan and member benefit.

Eligible Practitioners: PacificSource recognizes the following practitioners types as qualified health professionals eligible for reimbursement for tele-video and telephonic services:

- Naturopath
- Physicians
- Nurse Practitioners
- Nurse-Midwife
- Physician Assistants
- Clinical Nurse Specialists
- Registered Dietitian or Nutrition Professional
- Clinical Psychologists
- Clinical Social Workers and other mental health providers as outlined in member’s benefit
- Certified Registered Nurse Anesthetist
- FQHC and RHC Providers

Medicare Coverage Criteria

PacificSource follows the Center for Medicare and Medicaid Services (CMS) for coverage of Telehealth and Telemedicine services. Please refer to CMS.gov for coverage criteria.

In addition to what is covered under CMS, PacificSource Medicare allows for Licensed Professional Counselors, Licensed Marital and Family Therapists, Licensed Clinical Professional Counselors, Licensed Mental Health Counselors, FQHC, RHC to be eligible practitioners for Tele-video and Telephonic Services as appropriate with state law.

Medicaid Coverage Criteria

PacificSource Medicaid follows Oregon Health Plan (OHP) per Oregon Administrative Rules (OAR) s 410-130-0610, 410-146-0085, 410-147-0120, 410-172-0850 for coverage of Telehealth and Telemedicine services. Participating providers must comply with Medicaid Network Access standards as outlined in OAR 410-141-3515
Reimbursement and Claim Information

Reimbursement Information

- All Lines of Business
  - Telehealth visits will be subject to retrospective review, as appropriate.
- Commercial Lines of Business
  - Fees for originating site are ineligible for reimbursement

Claim Information

- Place of Service (POS) code 02 on CMS HCFA 1500 form will be paid at nonfacility RVU for Commercial and Medicaid lines of business and Facility RVU for Medicare line of business.
- Place of Service code 11 for telehealth claims is allowed but must be billed with either the GT or 95 modifier.
- Modifier GT or Modifier 95 and additional modifiers may be appended when appropriate to the CPT or HCPCS for telemedicine consultations.

Coding Information

All covered face to face services usually done in the office setting, including evaluation and management codes, are eligible to be performed via Tele-video and/or Telephone when criteria is met. Please see current AMA and CMS coding guidelines.
12. Publications and Tools

12.1 Websites and Online Resources

Our websites are a convenient way to contact PacificSource 24 hours a day, seven days a week. It is updated frequently and is a source of accurate information.

**Commercial: PacificSource.com**

The address of the PacificSource website is PacificSource.com. In the “Providers” section of the site, you’ll find:

- News on administrative issues affecting PacificSource providers
- InTouch for Providers, one of our most popular online tools (see section InTouch for Providers for more details)
- Information about imaging and electronic claims technology
- A list of services requiring preauthorization
- From the Home page, providers and PacificSource members can access the online Provider Directory.

**Medicaid: CommunitySolutions.PacificSource.com**

The address of the PacificSource Community Solutions website is CommunitySolutions.PacificSource.com. In the “For Providers” section of the site, you’ll find:

- News on administrative issues affecting PacificSource Community Solutions providers.
- InTouch for Providers— access personalized information about your PacificSource patients and their claims.
- Information about imaging and electronic claims technology.
- Archived issues of newsletters, news blasts, upcoming events, and other important updates.
- A list of services requiring preapproval.
- From the home page, providers and PacificSource Community Solutions members can access the online Provider Directory, which is updated daily. Users can search for in-network physicians and providers by name, zip code, city, specialty, and/or plan type, and can print a customized provider directory from the site.
- Links to dental care organization websites.
- Dental provider manuals and dental practice guidelines for each dental care organization.

**Medicare: Medicare.PacificSource.com**

The address of the PacificSource Medicare website is Medicare.PacificSource.com. In the “Providers” section of the site, you’ll find:

- News on administrative issues affecting PacificSource Medicare providers.
- InTouch for Providers, one of our most popular online tools (see section InTouch for Providers for more details)
- Information about imaging and electronic claims technology.
• Archived issues of newsletters, news blasts, upcoming events and other important updates.
• A list of services requiring preapproval.
• From the home page, providers and members can access the online Provider Directory, which is updated daily. Users can search for in-network physicians and providers by name, zip code, city, specialty, and/or plan type, and can also print a customized provider directory from the site.

InTouch for Providers

PacificSource InTouch for Providers is a secure, providers-only website. When you log in, you can access personalized information about your PacificSource patients and their claims 24 hours a day.

Use InTouch to:

• Find out if a patient has coverage with PacificSource.
• View member benefits.
• Check to see if a proposed medical treatment has been preauthorized by PacificSource.
• See if a managed care referral has been submitted for a member.
• Find a patient’s claim in our system by Member ID.
• Select an EOP date and get a detailed listing of all claims for your office that were processed on that date.
• Submit referrals and authorizations.
• Submit pharmacy prior authorization requests.
• Submit electronic funds transfers (EFTs) and 835 ERA enrollment forms.
• Use Point of Service Direct to access real-time, accurate, patient liability information and your actual charges for each procedure billed during a visit.
• Submit claims.
• Find a member’s assigned Dental Care Organization.

Registering for InTouch:

For your convenience, InTouch is available through the Web portal OneHealthPort. If you are already a registered user of OneHealthPort, you do not need to register to access InTouch.

If you are new to InTouch and OneHealthPort, you will need to register with OneHealthPort in order to access InTouch. Information about this process is available by selecting the Registration Information link in the Provider section of our websites.

If you have any questions about InTouch or the Providers section of our websites, you’re welcome to contact your Provider Service Representative. You can also use the Contact Us form on our website to describe any technical problems.

PacificSource members also have access to InTouch for Members, where they can look up claims information, track medical expenses, select a new PCP, and more.

Provider Directories

PacificSource provider directories serve as a valuable tool for identifying the in-network physicians and providers available for accessing medical services. The directories are designed to be user-friendly, give up-to-date listings of in-network physician and provider names, addresses, and telephone numbers.
Directories are uniquely designed to accompany a specific plan design and include in-network physicians and other healthcare professionals, such as physical therapists, mental health providers, optometrists, opticians, dental providers, podiatrists, and healthcare facilities, including in-network hospitals.

Our electronic directories (updated daily) lets website visitors search for a PacificSource physician or provider by name, or search for a list of providers by specialty or location. Take, for example, a member looking for an allergist on his plan's network within five miles of his home. Our new directory will help him locate one and can even provide a map and driving directions. Members will also be able to create, download, and print their own customized provider directories specific to their benefit plan and their geographic location.

12.2 Email Newsletters and Bulletins

The PacificSource Provider Newsletter is produced quarterly and mailed to all PacificSource in-network physicians and providers. The Provider Newsletter provides general information of interest to medical physicians and providers. PacificSource Provider Bulletin are emailed as needed reflecting policy changes, updates and relevant pertinent information for our provider partners.

In addition, we produce a Dental Bulletin twice a year, which is mailed to providers who participate in the Advantage Dental Network. The Dental Bulletin provides general information of interest to dental providers.

12.3 Medicaid: LineFinder

LineFinder is an online tool to assist providers in determining what is covered by the Oregon Health Plan (OHP). OHP generally updates the Line each year, on January 1. PacificSource Community Solutions will update the LineFinder tool as OHP releases updates.

Find our LineFinder tool online at InTouch.PacificSource.com/LineFinder.

For questions or assistance with the LineFinder tool, please contact your PacificSource Provider Service Representative.

12.4 Material in Alternate Format

PacificSource can provide information and our documents in way that works best for our members. We have people and free language interpreter services available to answer questions from non-English speaking members. We can also give information in Braille, in large print, or other alternate formats if it is requested.

Interpretation or translation services provided at a provider’s location are the responsibility of the provider.

12.5 Healthcare Interpreter (HCI) Services

PacificSource is responsible to ensure that members have access to HCI services. Members and potential members may not be charged. HCI services will be paid by the CCO as long as it supports a covered Medicaid service. Find a list of criteria for covered Medicaid services online at Oregon.gov/oha/healthplan/Pages/priorlist.aspx.
Interpreter services may be arranged by physical health, behavioral health, oral health, and home health providers. If the provider has qualified or certified interpreters on staff, the provider may bill the CCO directly adding HCPC code T1013 to the claim.

Bilingual employees who are not trained as either qualified or certified medical interpreters are not eligible for reimbursement. For quality and safety reasons, providers should not use untrained bilingual employees or bilingual patient family members for medical interpretation.

If the provider does not have qualified or certified interpreters, they may arrange for services through one of the following HCI organizations. Contracted HCI vendors bill PacificSource Community Solutions directly; therefore, neither provider nor member should receive a bill for these services. PacificSource’s contracted HCI vendors include:

**Certified Languages: (800) 362-3241**
- Offers phone interpreting services only.
- PacificSource’s access code: COIHS.
- You will be asked to provide the member name, date of birth, and identification number.

**Passport to Languages: (800) 297-2707**
- Offers phone, on-site (including sign language), and video interpreter services.
- No access code is required for this vendor. Identify you are calling on behalf of a PacificSource Community Solutions member and provide the member name, date of birth, and identification number.

**Bridges to Communications: (541) 385-1238**
- Offers on-site services (including sign language).
- Services are offered to PacificSource Community Solutions members in the Central Oregon area only.
- No access code is required for this vendor. Identify you are calling on behalf of a PacificSource Community Solutions member and provide the member name, date of birth, and identification number.

Many HCI companies require at least 48 hours advance notice to arrange for on-site HCI services. Telephonic and video interpretation services are readily available through the organizations that offer those services.
13. Health Plan Responsibility

Medicaid

PacificSource Community Solutions will cover emergency and urgently needed services from any licensed provider.

PacificSource Community Solutions will cover renal dialysis for those temporarily out of PacificSource Community Solutions service area.

PacificSource Community Solutions will cover influenza and pneumococcal vaccination with no copay.

PacificSource Community Solutions will make good faith efforts to notify all affected members of the termination of a provider contract 30 days before the termination by plan or by provider.

Once enrolled in PacificSource Community Solutions, members are sent information regarding PacificSource Community Solutions, how to access their benefits and their rights and responsibilities. All PacificSource Community Solutions members receive the following information upon enrollment:

- Member Handbook: This handbook outlines member’s benefits, rights and responsibilities, eligibility information, how to use the plan, what to do in cases of emergency, and any limitations of the plan.
- Member Identification Card: Members are instructed to use only the PacificSource Community Solutions card when accessing medical care.
- Provider Directory: This directory lists all general and specialty contracted providers that are available to PacificSource Community Solutions members. The directory provides them with names, addresses, and telephone numbers of Providers; a list of all contracted specialty providers, denotes whether or not providers are accepting new patients, and lists the providers by city and clinic location.
- The telephone numbers and address of PacificSource Community Solutions, Inc., and are instructed to direct all questions they may have about their plan to the PacificSource Community Solutions Customer Service staff.

Provider offices that receive questions from members concerning benefits, limitations, exclusion, etc., of the plan, should be directed to PacificSource Community Solutions Customer Service at the phone numbers listed in the Who to Contact section of this manual.

Medicare

Unless otherwise exempted by CMS, PacificSource Medicare may not deny, limit, or condition the coverage or furnishing of benefits to individuals eligible to enroll in a Medicare Advantage plan offered by PacificSource Medicare on the basis of any factor related to health status. This includes, but not limited to the following:

- Medical condition, including mental as well as physical illness
- Claims experience
- Receipt of healthcare
- Medical history
- Genetic information
- Evidence of insurability, including conditions arising out of acts of domestic violence
- Disability
PacificSource Medicare will cover emergency and urgently needed services from any licensed provider.

PacificSource Medicare must make timely and reasonable payment to or on behalf of our members for the following services obtained from a provider or supplier that does not contract with PacificSource Medicare where services are covered by PacificSource Medicare:

- Ambulance services dispatched through 911 or its local equivalent.
- Maintenance and post-stabilization care services.
- Services for which coverage has been denied by PacificSource Medicare and found (upon appeal) to be services the member was entitled to have furnished or paid for by PacificSource Medicare.

PacificSource Medicare will cover renal dialysis for those temporarily out of PacificSource Medicare's service area.

PacificSource Medicare will cover influenza and pneumococcal vaccination with no copay if administered in a pharmacy setting. In an office setting, an office-visit copay would still apply.

PacificSource Medicare must provide for continuation of member healthcare benefits for all members, for the duration of the contract period for which CMS payments have been made:

- For members who are hospitalized on the date its contract with CMS terminates or, in the event of an insolvency, through discharge.

PacificSource Medicare will send a written CMS-approved notification of the termination of a contracted provider at least 30 calendar days before the termination effective date to all enrollees who are patients seen on a regular basis by the provider whose contract is terminating, irrespective of whether the termination was for cause or without cause. When a contract termination involves a primary care professional, all enrollees who are patients of that primary care professional will be notified. In meeting these requirements, the provider will cooperate with PacificSource Medicare and assist in complying with these requirements when applicable.

If PacificSource Medicare suspends or terminates an agreement under which the physician provides services to PacificSource Medicare members, PacificSource Medicare will give the affected individual written notice of the following:

- The reasons for the action including, if relevant, the standards and profiling data used to evaluate the physician and the numbers and mix of physicians needed by PacificSource Medicare.
- The affected physician’s right to appeal the action and the process and timing for requesting a hearing.
- PacificSource Medicare will ensure that the majority of the hearing network members are peers of the affected physician.
- If PacificSource Medicare suspends or terminates a contract with a physician because of deficiencies in the quality of care, PacificSource Medicare will give written notice of that action to licensing or disciplinary bodies or to other appropriate authorities that include National Practitioner Data Bank and Health Integrity Practitioner Data Bank (NPDB/HIPDB).
- PacificSource Medicare and provider will provide at least 90 days written notice to each other before terminating the contract without cause.

PacificSource Medicare may specify the networks of providers from whom members may obtain services if PacificSource Medicare ensures all covered services, including supplemental services contracted for by (or on behalf of) the Medicare member, are available and accessible under PacificSource Medicare. To accomplish this, PacificSource Medicare must meet the following requirements:

- Provider network
• Maintain and monitor a network of appropriate providers supported by written agreements and is sufficient to provide adequate access to covered services to meet the needs of the population served.

These providers are typically used in the network as primary care providers (PCPs), specialists, hospitals, skilled nursing facilities, home health agencies, ambulatory clinics, and other providers.

Neither PacificSource Medicare nor provider may employ or contract with an individual or entity who is excluded from participation in Medicare under section 1128 or 1128A of the Act (or with an entity that employs or contracts with such an excluded individual or entity) for the provision of any of the following:

• Healthcare
• Utilization review
• Medical social work
• Administrative services

PacificSource Medicare will disclose certain CMS-required information to members. PacificSource Medicare will provide in a format using standard terminology specified by CMS, the information necessary to notify current and potential members the information they need to make informed decisions with respect to the available choices for Medicare coverage.

PacificSource Medicare will disclose to CMS all information necessary for CMS to administer and evaluate the program and to simultaneously establish and facilitate a process for current and prospective members to exercise choice in obtaining Medicare services. This information includes, but is not limited to:

• The benefits covered under an MA plan;
• The MA monthly basic beneficiary premium and MA monthly supplemental beneficiary premium, if any, for PacificSource Medicare;
• Plan quality and performance indicators for the benefits under PacificSource Medicare;
• Disenrollment rates for Medicare members electing to receive benefits through PacificSource Medicare for the previous two years;
• Information on Medicare member satisfaction;
• Information on health outcomes;
• The service area and continuation area, if any, of each plan and the enrollment capacity of each plan;
• The recent record regarding compliance of PacificSource Medicare;
• Other information determined by CMS to be necessary to assist members in making an informed choice among MA plans and traditional Medicare;
• Information about beneficiary appeals and their disposition;
• Information regarding all formal actions, reviews, findings, or other similar actions by states, other regulatory bodies, or any other certifying or accrediting organization; and
• Any other information deemed necessary by CMS for the administration or evaluation of the Medicare program.

In meeting these requirements, the provider will cooperate with PacificSource Medicare and assist in complying with these requirements when applicable.

Once enrolled in PacificSource Medicare, members are sent information regarding PacificSource Medicare, how to access their benefits and their rights and responsibilities. All PacificSource Medicare members receive the following information upon enrollment:
• Member Handbook—This handbook outlines member’s benefits, rights and responsibilities, eligibility information, how to use PacificSource Medicare, what to do in cases of emergency, and any limitations of PacificSource Medicare.

• Provider Directory—This directory lists all general and specialty contracted providers that are available to PacificSource Medicare members. The directory provides them with names, addresses, and telephone numbers of providers; a list of all contracted specialty providers; denotes whether or not providers are accepting new patients; and lists the providers by city and clinic location.

• Comparison of Benefits—This booklet compares the PacificSource Medicare health plan benefit package to traditional Medicare fee for service (FFS).

• PacificSource Medicare Identification Card—Members are instructed to use only the PacificSource Medicare card when accessing medical care.

• An Advance Directive Form, and are asked to review it with their doctor. Members may complete the form if they so desire.

• A Health Assessment form, and asked to complete it and return it to PacificSource Medicare so members with complex needs can be case managed.

• Telephone numbers and addresses of PacificSource Community Health Plans (PacificSource Medicare), and are instructed to direct all questions they may have about their plan to the PacificSource Medicare Customer Service staff.

Provider offices receiving questions from members concerning benefits, limitations, exclusion, etc., of PacificSource Medicare, should direct members to PacificSource Medicare Customer Service. Contact phone numbers are listed in the Who to Contact section.
14. Compliance & Program Integrity

Compliance Website
For our Medicare and Medicaid business, we maintain compliance websites (CommunitySolutions. PacificSource.com/About/Compliance and Medicare.PacificSource.com/Compliance) that provide information on topics such as provider training and education, examples of compliance and Fraud, Waste & Abuse (FWA) issues, and methods for reporting of these issues.

Compliance Program Integrity
We maintain a Compliance and Program Integrity Plan. This plan can be found on any of our compliance websites. These documents are a series of policies, procedures, and guidance that articulate our expectations of our employees, contractors, providers, and business partners. You are required to read these documents and abide by them.

Disciplinary Standards
We maintain a Code of Conduct policy that you are required to abide by. Failure to comply with our compliance and contractual requirements may result in disciplinary actions, up to and including termination of contract. Please refer to the applicable sections in our Compliance and Program Integrity Plan for more details.

Fraud, Waste & Abuse and Compliance Reporting
You have contractual and compliance obligations to report known or suspected issues of noncompliance and fraud, waste, and abuse. You must cooperate with PacificSource, the State, and the Federal Government (such as CMS) in ongoing efforts to combat fraud, waste, and abuse. You should review your current processes to ensure that your office staff is aware of the responsibility to report known or suspected fraud, waste, or abuse and other compliance concerns. Further, to respond to requests for information from PacificSource, the State, and the Federal Government in a timely and complete manner. Investigators rely on providers like you to provide certain information. Please refer to the applicable sections in our Compliance and Program Integrity Plan for more details.

You can report any fraud, waste, and abuse or compliance concerns directly to your PacificSource Provider Service Representative, to our Customer Service team, or anonymously by contacting EthicsPoint (a PacificSource vendor):

Provider Service:
- By phone at (800) 624-6052, ext.2580
- By email at providerservicerep@pacificsource.com

EthicsPoint:
- By phone 24 hours a day/seven days a week at (888) 265-4068; or

Provider Exclusion and Preclusion
In addition to credentialing and contracting requirements described in this manual, for Medicare and Medicaid, PacificSource will not contract with or pay claims to providers who have been precluded,
sanctioned or excluded from participating in Medicare or Medicaid programs, or who have opted-out of the Medicare program. The OIG’s List of Excluded Individuals/Entities (LEIE) and GSA’s System for Award Management (SAM) search utilizes the government’s database for individuals and businesses excluded or sanctioned from participating in Medicare, Medicaid, or other federally funded programs.

For Medicare, CMS has developed a Preclusion List. Providers who are found on the list will be promptly removed from the PacificSource Medicare network. Providers on the Preclusion list are precluded from receiving payment for Medicare Advantage items and services or Part D drugs furnished or prescribed to Medicare beneficiaries. Prior to being included on the list, CMS will notify providers via an official letter.

All providers are required to immediately disclose to PacificSource any exclusion or other events that make them ineligible to perform work related directly or indirectly to a government healthcare program. Failure to disclose may result in appropriate corrective actions, up to and including termination of contract. Please refer to the applicable sections in our Compliance and Program Integrity Plan for more details.