User Manual for Transaction Management System

AYUSHMAN BHARAT – PRADHAN MANTRI JAN AROGYA YOJANA (AB PM-JAY)

VERSION 6.0
23-JAN-2018
# Table of Contents

- CHANGES MADE IN THE TMS ................................................................. 2
- TMS WORKFLOW ..................................................................................... 3
- PREAUTHORIZATION WORKFLOW .......................................................... 5
- MENUS AND SUB MENUS ..................................................................... 6
- CASE STATUS ........................................................................................... 7
- PATIENT REGISTRATION ......................................................................... 9
  - DIRECT REGISTRATION ......................................................................... 9
  - TELEPHONIC REGISTRATION ............................................................... 14
  - REGISTRATION BY OFFLINE TMS ...................................................... 21
  - REGISTRATION BY TEMPORARY ID/TEMP ID .................................. 25
- PREAUTHORIZATION .............................................................................. 28
  - PREAUTHORIZATION PROCESS INITIATED BY MEDCO .......... 28
  - PREAUTHORIZATION UPDATION BY MEDCO ........................ 33
  - ENHANCEMENT FOR MEDICAL CASES ..................................... 36
  - HIGH END DIAGNOSIS FOR MEDICAL CASES .................... 38
  - SPECIAL CASES ................................................................................. 41
- PATIENT MANAGEMENT AND DISCHARGE ......................................... 42
  - CLAIM INITIATED BY MEDCO .......................................................... 46
  - CLAIM UPDATION BY MEDCO ......................................................... 49
- MIS51
  - HOSPITAL BANK REPORT .............................................................. 51
  - REGISTERED PATIENTS REPORT ...................................................... 51
  - DEATH CASES REPORT .................................................................. 52
  - OP REGISTERED CASES REPORT .................................................... 52
  - PACKAGE MASTER ........................................................................ 53
  - HOSPITAL DETAILS ......................................................................... 53
Changes made in the TMS

1. Temp ID Integration
2. Displayed temp id registrations in different color in Pre- auth initiation tab and also a button is provided to check the status
TMS Workflow

TMS Workflow explains all roles and responsibility involved in this process as mentioned below.

1. Beneficiary Approaches Empanelled Hospital
2. Beneficiary Registration in Hospital by PMAM / Medco
3. Preliminary diagnosis
4. Categorize Patient as OP / IP
5. Case marked as OP
6. Preauth Initiation by Medco / PMAM
7. Case Auto approved for listed procedures
8. Case requiring Manual approval from PPD
   - Rejected
   - Approved
   - Pending for clarification
9. Treatment Provided and Case Updated by PMAM / Medco
10. Patient discharged

This workflow diagram illustrates the steps involved in TMS, including Beneficiary Approaches, Registration in Hospital, Preliminary Diagnosis, Categorization, Preauthorization, Approval, and Treatment Update.
User Manual for TMS

Discharge Update by PMAM / Medco

Claim Initiation by PMAM / Medco

Claim Verified by Claim Executive

Claim Processing by CPD Trust / Insurance

Rejected

Approved

Pending for clarification

Accounts Officer Approval

SHA Approval (if mandated)

Claim Settled with Hospital

Patient discharged

Preliminary diagnosis

Categorize Patient as OP / IP

Case marked as OP

In Patient

Preauth Initiation by Medco / PMAM

Case Auto approved for listed procedures

Case requiring Manual approval from PPD

Approved

Rejected

Pending for clarification

Treatment Provided and Case Updated by PMAM / Medco

Discharge Update by PMAM / Medco

Claim Initiation by PMAM / Medco

Claim Verified by Claim Executive

Claim Processing by CPD Trust / Insurance

Rejected

Approved

Pending for clarification

Accounts Officer Approval

SHA Approval (if mandated)

Claim Settled with Hospital

Patient discharged

Patient discharged
Preauthorization Workflow

Preauthorization Workflow explains all roles and responsibility involved in this process as mentioned below.

* Hospital Co-Ordinator: It could be MEDCO and/or PMAM.
# Menus and Sub Menus

Below are the Menus and Sub-Menus involved in TMS Application.

<table>
<thead>
<tr>
<th>S. No.</th>
<th>Menus</th>
<th>Sub-Menus</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Patients</td>
<td>Register Patient</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Telephonic Registered Patients</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OP Registered</td>
</tr>
<tr>
<td>2.</td>
<td>Pre-auth</td>
<td>Preauth Initiation - New</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preauth Initiation - Old</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cases for Surgery/Discharge</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preauth Query Updation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cases for Cancellation</td>
</tr>
<tr>
<td>3.</td>
<td>Case Search</td>
<td>NA</td>
</tr>
<tr>
<td>4.</td>
<td>Claims</td>
<td>Claim Initiation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Claim Query Updation</td>
</tr>
<tr>
<td>5.</td>
<td>MIS</td>
<td>Hosp Bank Report</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Registered Patients Report</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Death Cases Report</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OP Registered Cases Reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Package Master</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Hospital Details</td>
</tr>
</tbody>
</table>
# Case Status

Below are the Case statuses for all cases involved in TMS Application.

<table>
<thead>
<tr>
<th>S. No.</th>
<th>Case</th>
<th>Current</th>
<th>Previous</th>
<th>Next</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Out patient</td>
<td>OP case Registered</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>2.</td>
<td>In patient</td>
<td>IP case registered</td>
<td>NA</td>
<td>MEDCO Pre-auth initiated</td>
</tr>
<tr>
<td>3.</td>
<td>Pre auth initiation</td>
<td>MEDCO Peauth initiated</td>
<td>IP case registered</td>
<td>PPD Approve/PPD rejected/PPD pending</td>
</tr>
<tr>
<td>4.</td>
<td>Pre auth Updation</td>
<td>PPD Insurer/Trust /Multi Approve</td>
<td>MEDCO Pre-auth initiated</td>
<td>surgery Date updated by MEDCO</td>
</tr>
<tr>
<td>5.</td>
<td>Pre auth Updation</td>
<td>PPD Insurer/Trust /Multi Pending</td>
<td>MEDCO Pre-auth initiated</td>
<td>MEDCO Pending Updated</td>
</tr>
<tr>
<td>6.</td>
<td>MEDCO Updation</td>
<td>MEDCO Pending Updated</td>
<td>PPD Insurer/Trust /Multi Pending</td>
<td>PPD Insurer/Trust /Multi Pending Approved</td>
</tr>
<tr>
<td>7.</td>
<td>Pre auth Updation</td>
<td>PPD Insurer/Trust /Multi Pending Approved</td>
<td>MEDCO Pending Updated</td>
<td>surgery Date updated by MEDCO</td>
</tr>
<tr>
<td>8.</td>
<td>Pre auth Updation</td>
<td>PPD Insurer/Trust /Multi Reject</td>
<td>MEDCO Pre-auth initiated</td>
<td>NA</td>
</tr>
<tr>
<td>9.</td>
<td>NA</td>
<td>Procedure Auto Approved</td>
<td>MEDCO Pre-auth initiated</td>
<td>surgery Date updated by MEDCO</td>
</tr>
<tr>
<td>10.</td>
<td>Cancel</td>
<td>Pre Auth-Cancelled</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>11.</td>
<td>Cases for Surgery updation</td>
<td>surgery Date updated by MEDCO</td>
<td>PPD Approve</td>
<td>Discharge Date updated by MEDCO</td>
</tr>
<tr>
<td>No.</td>
<td>Description</td>
<td>Action 1</td>
<td>Action 2</td>
<td>Action 3</td>
</tr>
<tr>
<td>------</td>
<td>-----------------------------</td>
<td>-----------------------------------</td>
<td>-----------------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>12.</td>
<td>Cases for Discharge updation</td>
<td>Discharge Date updated by MEDCO</td>
<td>surgery Date updated by MEDCO</td>
<td>Claim initiated by MEDCO</td>
</tr>
<tr>
<td>13.</td>
<td>Claim initiation</td>
<td>Claim initiated By MEDCO</td>
<td>Discharge Date updated by MEDCO</td>
<td>Claim forwarded By CEX</td>
</tr>
<tr>
<td>14.</td>
<td>Claim Updation</td>
<td>Claim forwarded By CEX</td>
<td>Claim Initiated by MEDCO</td>
<td>Claim approved by Claim Panel doctor</td>
</tr>
<tr>
<td>15.</td>
<td>Claim Updation</td>
<td>Claim Insurer/Trust/Multi approved by Claim Panel doctor</td>
<td>Claim forwarded By CEX</td>
<td>NA</td>
</tr>
<tr>
<td>16.</td>
<td>Claim Updation</td>
<td>Claim kept Pending by CPD</td>
<td>Claim forwarded By CEX</td>
<td>Claim Pending Updated by MEDCO to CPD</td>
</tr>
<tr>
<td>17.</td>
<td>MEDCO Updation</td>
<td>Claim Pending Updated by MEDCO to CPD</td>
<td>Claim kept Pending by CPD</td>
<td>Claim Pending Approved by CPD</td>
</tr>
<tr>
<td>18.</td>
<td>Claim Updation</td>
<td>Claim Pending Approved by CPD</td>
<td>Claim Pending Updated by MEDCO to CPD</td>
<td>NA</td>
</tr>
<tr>
<td>19.</td>
<td>Claim Updation</td>
<td>CPD Insurer/Trust/Multi Reject</td>
<td>Claim forwarded By CEX</td>
<td>claim forwarded to Accounts Officer</td>
</tr>
<tr>
<td>20.</td>
<td>Claim Updation</td>
<td>Claim forwarded to Accounts officer</td>
<td>CPD Insurer/Trust/Multi Reject</td>
<td>Claim forwarded to SHA</td>
</tr>
<tr>
<td>21.</td>
<td>Claim Updation</td>
<td>Claim forwarded to SHA</td>
<td>claim forwarded to Accounts Officer</td>
<td>NA</td>
</tr>
</tbody>
</table>
Patient Registration

Any patient wants to take the services through AB PM-JAY scheme he should be registered either through Direct or Telephonic Registration (In case of Emergency).

1. Direct Registration - Arogya Mitra / MEDCO (A person appointed by the insurance who is present at the hospital for registering Pradhan Mantri Jan Arogya Yojana (PM-JAY) patients into the scheme) for entering the Patient details, if patient visits the hospital directly.

2. Telephonic Registration - In case of an emergency, when a surgery needs to be done immediately (emergency cases) telephonic approval is taken from concerned Approvers. Later the Arogya Mitra will have to register the case into our system.

3. Registration by Offline Medco – In offline registration, there is a new role called “Offline- Medco” in TMS, where the offline medco will be able to register patients. Each Offline- Medco will be mapped to few hospitals. Once the Offline- Medco register the patient in any particular hospital, the case will be shown in that respective hospital and the process continuous to be the same.

Direct Registration

Arogya Mitra / MEDCO should be able to register the Patient by entering the Patient details using TMS, if patient visits the hospital directly.

Login to the operations worklist by giving Arogya Mitra /MEDCO credentials and click on Login button to initiate cases for the registration of the patient as shown in the screenshot.
Dashboard appears first which has all the statistical data for cases initiated by the EHCP while Arogya Mitra logins.
Patient:

Register Patient:

Retrieve the beneficiary details by populating fields such as id type (AB PM-JAY ID, Mobile Number, Aadhar card, Ration card, and any other card), id number and New born baby which is a non-mandatory field as shown in the screenshot.

Select the Date of Registration and click on Register button by providing the patient details and Action Type as Register as shown in the screenshot.

This step helps Mithra to verify the patient in the hospital with the details coming in system.
Click on OK button for registering the patient as shown in the screenshot

Unique patient id will be generated on clicking OK button after registering the patient in PM-JAY.

**Patient Registered View:** In registered patient view, registered patients will be displayed as shown in the screenshot.
Arogya Mithra can view the patient details by click on the Registration No as shown below:

Below page will be displayed by clicking registration Id as shown in the screenshot. Arogya Mitra /MEDCO can also use print button to get the print of the following details.
Telephonic Registration

In case of an emergency, when a surgery needs to be done immediately (emergency cases) Pre-Auth Executive should be able to enter the Patient details through telephone. Later the Arogya Mitra will register the case to PM-JAY.

Login to the operations worklist by giving Pre-auth Executive credentials and click on Login button to initiate cases for the registration of the patient through telephone as shown in the screenshot.
Pre-Auth Executive would be able to register the patient using TMS as shown in the screenshot.
Click on OK button for registering the patient as shown in the screenshot.

Unique Telephonic id will be generated on clicking OK button after submitting the patient details through Telephone as shown in the screenshot.
In Telephonic registered patient view, registered patients through telephone will be displayed as shown in the screenshot.

Then it will go to Arogya Mitra’s pool and he will register the corresponding patient which will be like direct registration process mentioned earlier.

**Initial Diagnosis and Admission**

Initial Diagnosis and Admission explains how an Inpatient and Outpatient Registration will be done. If any patient wants to take the services through this scheme he should register either as Inpatient or Outpatient through MEDCO (network hospital doctor).

**In-Patient Registration:** Provisional diagnosis will be done at the Network Hospitals. Patient will be recommended for certain tests and based on the reports MEDCO (network hospital doctor) will convert the patient as **Inpatient** (patient will be admitted in the hospital and surgery needs to be done).

**Out-Patient Registration:** MEDCO (network hospital doctor) will convert the patient as **Outpatient** (If no Surgery is required), If no further treatment is required based on the examination of the reports with respect to certain tests after completion of provisional diagnosis.

**In-Patient Registration:**
MEDCO should be able to register the Patient as In-Patient by diagnosing the patient.

Login to the operations worklist by giving MEDCO credentials and click on Login button to initiate in-patient cases as shown in the screenshot.

Retrieve the registered ported patients by clicking the Registered Patient View as shown in the screenshot.
Click on Registration No. for registering the patient as In-Patient or General Out-Patient

On selecting the IP Radio Button, the system with prompt for confirming the patient as IP as mentioned in the below:
Press OK for confirming the conversion of patient as IP. Submit all the mandatory details, select Investigations and Press ADD Procedure Button to add the Procedure as shown below:

Select Action Type as initiate Pre-auth and submit it for initiation the patient case as shown in the screenshot.
Registration by Offline TMS

For the places/Hospitals where there is no internet connectivity, the system will have a single user named as OFFLINE-TMS at SHA through offline TMS login. The user would be able to drive the entire process on behalf of hospital (applicable only for auto-approved procedures).

System prompts the user to confirm registering the patient offline.
Retrieve the beneficiary details by populating fields such as id type (AB PM-JAY ID, Mobile Number, Aadhar card, Ration card, and any other card), id number and New born baby which is a non-mandatory field as shown in the screenshot.

System shall show a confirmation message again as show below
System shall retrieve the details of the patient as shown below.

Upon clicking on action type “Register”, the following page is displayed.
Clicking on “OK”, the system shall register the case with a unique case ID as shown below

The registered cases are listed as shown below
Registration by Temporary ID/Temp ID

Retrieve the beneficiary details by populating fields such as id type (AB PM-JAY ID, Mobile Number, Aadhar card, Ration card, and any other card), id number and New born baby which is a non-mandatory field as shown in the screenshot.

Upon clicking “retrieve” button the family details are shown as below
Now the Medco/Mithra can check the temporary cards by using “check for temporary card” button as shown below:

Proceed button will be enabled upon selecting the radio button beside the required patient name as shown below:
System will show the temp id registrations in different color in Pre auth initiation tab and also a button is provided to check the status as shown below

Below screen is appeared, upon clicking the registration number

Medco will be able to convert the patient into IP or OP after the approval of Patient ID.
Upon approval, Medco will be able to convert the patient and register the ID accordingly.

In case the Patient ID is rejected in BIS, system throws a message as shown below.

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**Preauthorization**

**Preauthorization Process Initiated by MEDCO**

MEDCO/Medco-offline should be able to initiate the Preauthorization by submitting the inpatient details. Login to the operations work list by giving MEDCO credentials for initiating the Preauthorization process and retrieve the State-wise In-Patient registered patients by clicking the Pre-Auth Initiation as shown in the screenshot.

In “Preauth Initiation – New” registered patients will be displayed as shown in the screenshot. Arogya Mitra /MEDCO/Medco -offline can print the case details and can also cancel the case by using “print” and “cancel” button respectively as shown below.
Click on registration No in order to get the patient details.
Select the Case Number for raising the Pre-Auth for that specific patient. Enter the Admission date and all other mandatory details. Also select Action Type as Initiate Pre-Auth as shown below:

System prompts to upload the mandatory attachment upon clicking submit (in case of attachment missing), as shown below:
Submit all mandatory attachments for Pre-Auth tab as shown in the screenshot.

After successful uploading of the attachment, the below screen is shown.
Click OK for initiating the Pre-Auth as shown below:

After submitting the Pre-Authorization, message will be generated as shown in the screenshot.
After confirmation, the case number is generated with a message as shown below

Preauthorization Updation by MEDCO

PPD kept pending cases will be seen in Pre auth Query updation, Medco can update the query for the case and submit it PPD.

Preauth Query updation:
Medco can view the case details by clicking on the Case number as shown below:

MEDCO should be able to update the required information to PPD for the cases kept for pending by PPD as shown below.
Click on OK button for updating the required information as shown in the screenshot.

After Clicking OK, message will be generated as shown in the screenshot.
Enhancement for Medical Cases

For some medical procedures which have per day package rate depending upon the type of ward selected, once Pre-Authorization has been approved or auto approved for the first day, an enhancement can be raised for a maximum of five days. Enhancement can be initiated from Pre-Authorisation tab under the Case of Surgery/Discharge worklist.

MEDCO has to select the number of days & type of ward and upload mandatory documents for initiating an enhancement request as mentioned in the below screen shot:
Once MEDCO clicks Initiate Enhancement button, the system will prompt the user as per the below mentioned screenshot:

In order to initiate the enhancement request, MEDCO should click the OK button. The system will again prompt MEDCO with a confirmation that the Enhancement has been raised:
In case of Medical packages, where there is requirement of additional diagnosis user can give details using “ADD High End Diagnosis” button as shown below.

Once the user clicks on high end diagnosis button, a drop down with respective diagnosis type are shown.
After adding the diagnosis, system throws a confirmation message as shown below.

Medco/Medco offline can initiate preauth by selecting “initiate Pre-auth” in action type drop down.

System throws a confirmation message as shown below.
*In case of High end diagnosis, the medical case is not auto-approved, it should to Pre auth panel doctor (PPD) for approvals.  

Case number is generated after medco initiating Pre-auth
Special Cases

The system will allow MEDCO/MITHRA to select the LAMA or DAMA case while discharging beneficiary for adjusting the claim amount as per applicability of the case.

In case the Medco selects special case as “Yes”, Special case type drop down is enabled as shown below:

Medco can select the options from drop down and submit the case. Later on this special case will get reflected in CPD login.

In case the Medco selects special case as “NO”, Special case type drop down is not enabled as shown below:
Patient Management and Discharge

Patient Management is giving treatment to the patient who want to avail hospital services, he has to be admit in the hospital either for the Surgery or for Medical. After completion of the treatment, process will be ended by discharging him.

- **Patient Management:** After Preauthorization, MEDCO (Network Hospital Doctor) verifies whether the beneficiary can go for Surgery or Therapy. Based on the procedure, he has to submit by providing treating doctor details, Daily Clinical Notes like Medicines, B.P and some attachments like post-surgery photos. After this Case Status will be changed as Pre-Auth to Surgery update.

- **Patient Discharge:** After Surgery update, MEDCO (Network Hospital Doctor) will provide Discharge Summary and attachments like Post Surgery/Therapy Special Investigation, patient photo, Treating doctor and Arogya Mitra photo’s, Satisfaction Letter and Transport Acknowledgement Letter (As Transport facility will be provided freely) at the time of Discharge. Hospital has to treat freely up to 10 days after discharge, if any complications came for the patient.

MEDCO should be able to view Pre-Authorization Approved cases in the ‘Cases for Surgery/Discharge’ tab as shown in the screenshot.
Click on Case No. for updating Surgery details:

Click on ‘save’ button by providing the mandatory details and mandatory Attachments in surgery/Discharge Tab as shown in the screenshot. (User should save details at least once in order to view submit button)
Attachments to be submitted are given in the attachments tab as shown below:
Click on the submit button which is enabled, as shown below
Click on OK button for updating the Surgery/Discharge details as shown in the screenshot.

Claim initiated by MEDCO

MEDCO should be able to view Discharge updated cases in Claim Initiation tab as shown in the screenshot. Click on Case No. for submitting claim details for a specific case.
Click on Submit button by selecting Action Type as Initiate Claim and updating the mandatory Claim Details in the Claim tab as shown in the screenshot.

After initiating Claim, need to click on ‘OK’ button as shown in the screenshot.
After Clicking OK, message will be generated as shown in the screenshot.
Claim Updation by MEDCO

MEDCO should be able to update the required information to CPD for the cases kept for pending by CPD as shown below.
Click on OK button for updating the required information as shown in the screenshot.

After Clicking OK, message will be generated as shown in the screenshot and the claim would be sent to Claim Executive (CEX) for claim processing.
MIS

Hospital Bank Report
Consists of bank details of that particular hospital

Registered Patients Report
This report consists of list of all the patients registered in that particular hospital as shown below.
Death Cases Report
This report consists of list of all the Death cases in that particular hospital as shown below.

OP Registered cases Report
This report consists of list of all the Out-Patients registered in that particular hospital as shown below.
Package Master
This consists of package master which is applicable for that particular state as shown below

Hospital Details
This consists of Hospital details such as Hospital ID, Name, Type of hospital, Address, Specialties mapped to the hospital and Bank account mapped to the hospital which are applicable for that particular Hospital as shown below