



USER'S MANUAL

(A quick guide for Standalone users)

Version 2.0.0

CLAIM-it

. Generate . Submit . Analyze

The provider-end claims generation application

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1.0 GENERAL INFORMATION

This section explains in general, the system and its intended purpose.

1.1 System Overview

CLAIM-it is a software that serves as a platform which allows health providers credentialed by the National Health Insurance to generate and submit claims. It implements and enforces all the necessary claims generation rules and protocols of the NHIS. Hence all claims submitted for reimbursement have to be validated by the software therefore ensuring due diligence prior to claims submission. The application runs fully offline allowing users to interact with the internet only where necessary for the purposes of system updates and claims submission.

CLAIM-it can be installed and operated on a single user computer or implemented as a network application with as many user nodes as needed. It can also be integrated into any existing Hospital Health Management System (HMS).

Claims are submitted electronically by downloading and saving claims on a flash drive for later submission or submitted directly to NHIS over the internet. The application also has a printing feature for the printing of claims where necessary.

1.2 Organization of Manual

The user's manual consists of **nine (9)** major sections: General Information, Getting Started, Adding Users, Using the System, Updating the system, Reporting, Data Backup, Troubleshooting and Software Uninstallation.

The General Information section explain, in general, the purpose of the system as well as providing an overview of the system and its usefulness.

The Getting Started section explains the basic requirements for the software for successful installation and operation as well as where to find help when needed.

The Adding Users section touches on how to add users to the applications as well as the various user roles and privileges or access levels within the application.

The Using the System section provides a detail description of all features of the application.

The Updating system section also provides a detailed walk through the update feature of the application.

The Reporting section of this manual presents to the user the various reports available for the data captured by the application.

The Data backup section touches on the data backup features of the application and how to prepare for unplanned system failures.

The Troubleshooting section of this manual will bring into perspective the troubleshooting feature of the application, showing how to get the application back online should you encounter any technical difficulties.

The Software Uninstallation section takes users through the process of removing the application from the user's computer.

2.0 GETTING STARTED

This section explains the basic requirements of the software for successful installation and operation.

2.1 System Requirements

The following are the minimum requirements for optimum performance of the application:

Table 2-1: Minimum system requirements

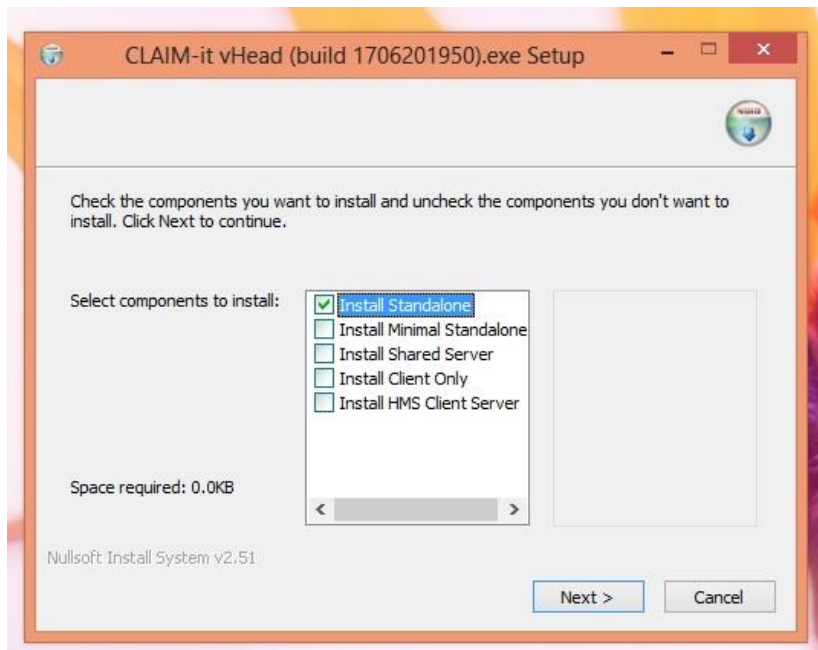
Operating System	Windows 7 or later
Processor	Dual core, 2.0GHz
Memory	2GB
Storage Space	120 GB

Note: System requirements are subject to the volume of claims being processed by the facility. Hence, higher memory allocation, for instance, is recommended for computers processing greater claims volumes.

2.2 Installation

This user manual assumes you already have a copy of the setup file for the software. However, you can always visit the **NHIS CLAIM-it website (claimit.nhia.gov.gh)** to download a new copy of the setup file.

To install the software, double-click on the setup file and follow through the various prompts to complete your installation. In addition to the software (CLAIM-it), the setup file contains all the pre-requisite applications necessary for the smooth operations of the application. Hence, all pre-requisites will be installed before the software is configured on your computer. The following illustrates the installation process.

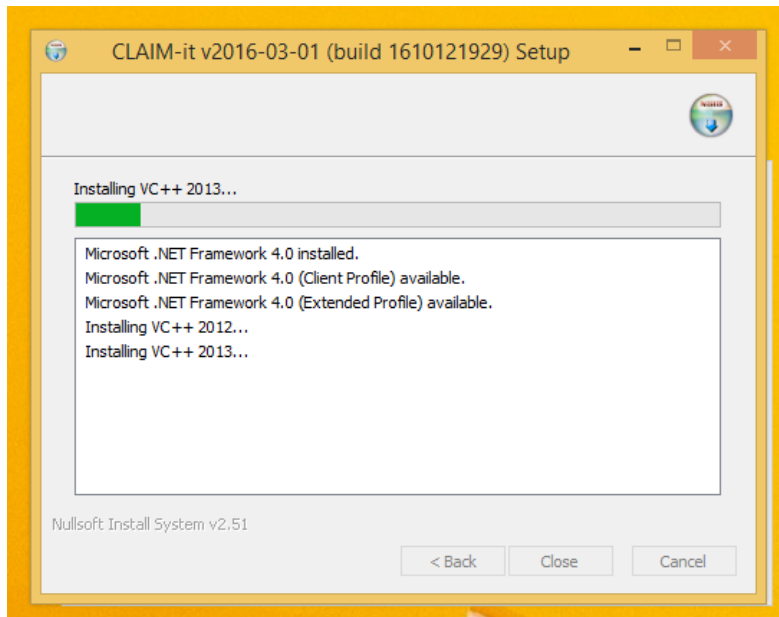


If the installation is for a single independent computer, use the default setting, else select the option that applies to your setting. Below are brief explanations to the various installation types.

- a. **Install Standalone:** This installs and configures the CLAIM-it installation as an independent environment where the database resides locally on the computer.
- b. **Install Minimal Standalone:** This is much similar to the standalone installation. However, this is more suited if the computer has a lower memory size of about 1GB or a few MB short of the minimal requirements.
- c. **Install Shared Server:** This option configures the computer to serve other CLAIM-it users (Client user) that are connected to it. Hence, it hosts both the server and the database. This configuration is suitable for environments with a Local Area Network (LAN).
- d. **Install Client Only:** This option installs only the client version of the application. This option assumes that the client will be connecting to a CLAIM-it server via a network address. A local database is therefore not installed on this computer. Note that for the client to work, the server has to be up and running.
- e. **Install HMS Client Server:** This configures the computer just like a standalone installation. The only difference here is that the software is configured to receive and process claims XML files generated from a Health Management System (HMS) that is compliant with the CLAIM-it standards. Hence, direct claims

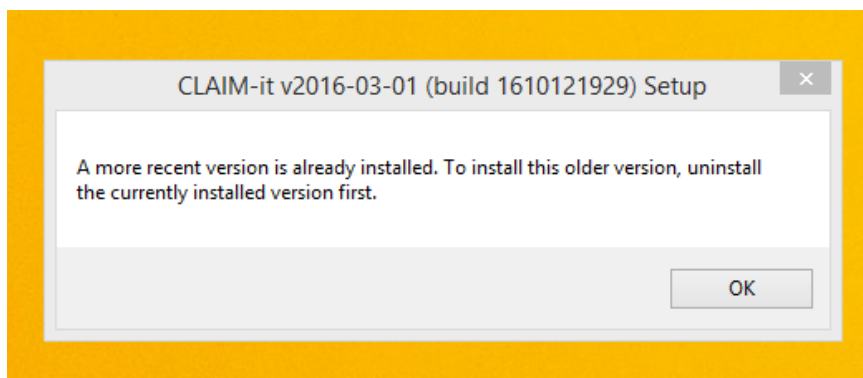
addition/generation cannot be performed via the application. All corrections will have to be done from the primary source of the data. i.e. HMS.

Click on install to start the installation process



Installation in progress

If there is an already existing installation, the application determines if the installed version is higher than that being installed. If it is older, you will be prompted to uninstall the current version as shown in the figure below.



2.3 Starting Claim-IT

After installation double-click on the CLAIM-it shortcut icon located on the desktop of your computer (Figure 2-1). This will initialize the application and popup a login screen. The default username and password are **admin** and **admin** respectively. Illustrated in Figure 2-2.

Figure 2-1: CLAIM-it shortcut icon

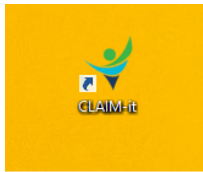
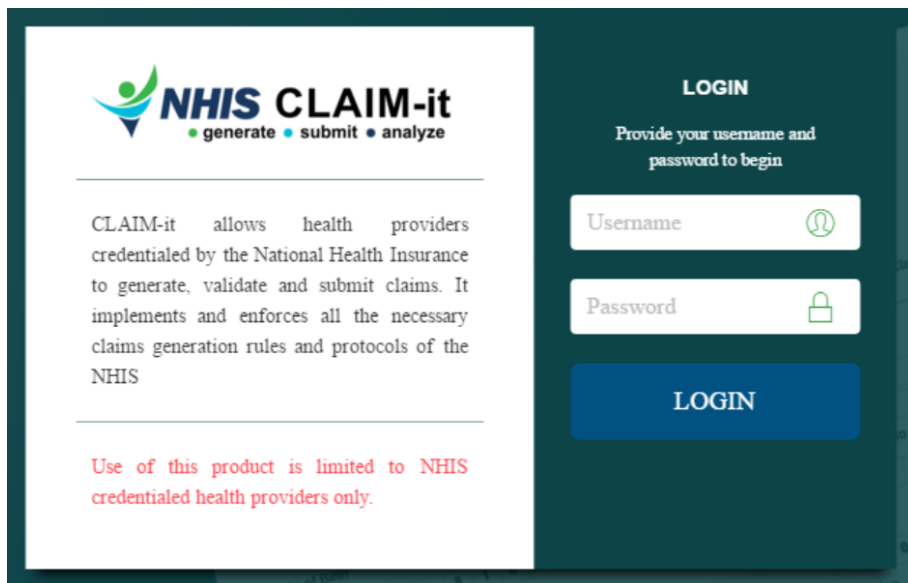
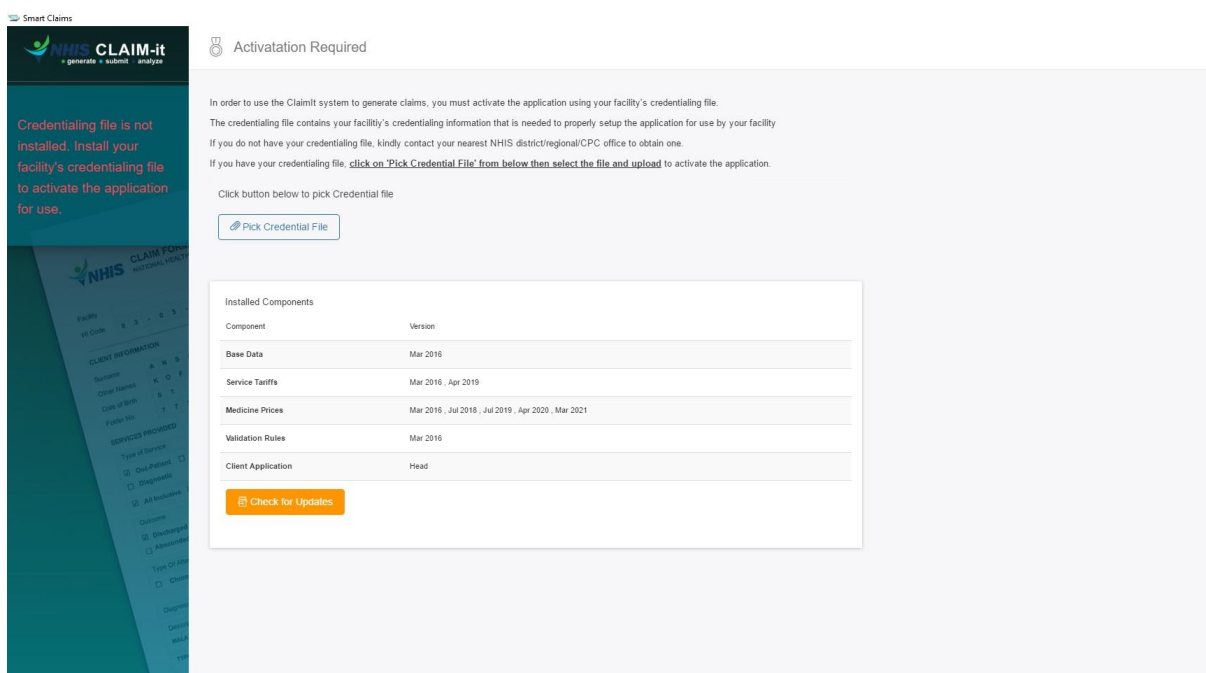


Figure 2-2 : CLAIM-it Login screen



A successful login will open the home screen for the application as shown in Figure 2-3.

Figure 2-3 : CLAIM-it Home screen



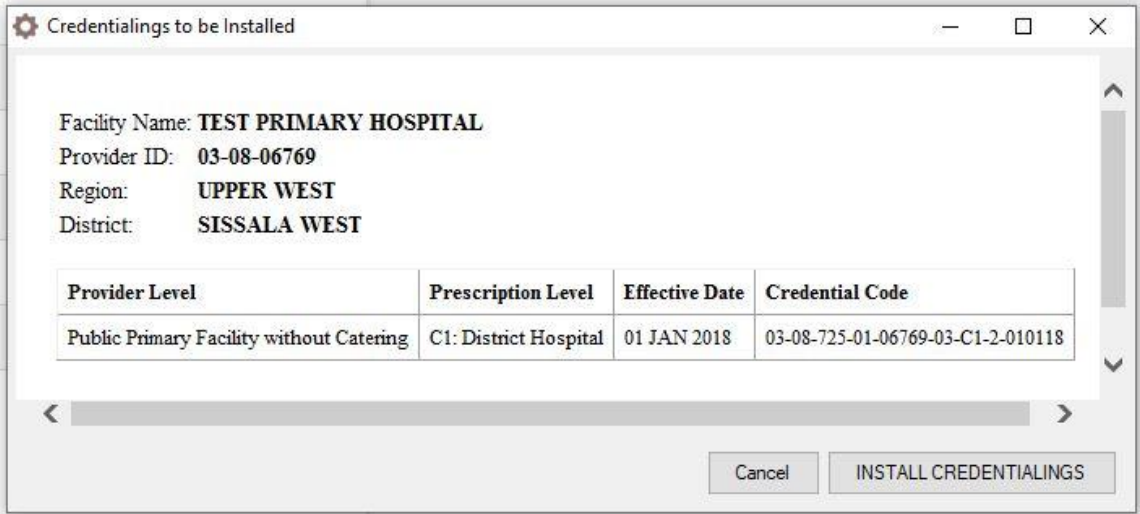
2.4 Loading Credentialing File

The “**Credentialing file is not installed. Install your facility’s credentialing file to activate the application**” message on the left top corner of the home screen simply means, no credentialing details were detected by the application. The accreditation file contains the credentialing details of a health facility. The credentialing file can be obtained from NHIA.

The application will not function without a valid credential file

To load the credentialing file, follow the following steps;

1. Double-click on the credentialing file to display the credentialing that will be installed.



Credentialings to be Installed

Facility Name: **TEST PRIMARY HOSPITAL**
Provider ID: **03-08-06769**
Region: **UPPER WEST**
District: **SISSALA WEST**

Provider Level	Prescription Level	Effective Date	Credential Code
Public Primary Facility without Catering	C1: District Hospital	01 JAN 2018	03-08-725-01-06769-03-C1-2-010118

Cancel INSTALL CREDENTIALINGS

2. Confirm that the credentialing details displayed are accurate. If you believe any information is inaccurate, click on “Cancel” and contact NHIA for clarifications and/or corrections. In the case of a correction, a new Credentialing File will be sent to you.
3. However, if all the details are correct, click on “Install Credentialing’s” to install.
4. Finally, provide your CLAIM-it Login details when prompted, and click on “Login” to authorize the installation.

Alternatively,

1. Login to the application

Activation Required

In order to use the ClaimIt system to generate claims, you must activate the application using your facility's credentialing file.

The credentialing file contains your facility's credentialing information that is needed to properly setup the application for use by your facility.

If you do not have your credentialing file, kindly contact your nearest NHIS district/regional/CPC office to obtain one.

If you have your credentialing file, click on 'Pick Credential File' from below then select the file and upload to activate the application.

Click button below to pick Credential file

 Pick Credential File

2. Click on "Pick credentialing file" and browse to where the file is located.
3. Click on "Upload" to start system configuration.

In order to use the ClaimIt system to generate claims, you must activate the application using your facility's credentialing file.

The credentialing file contains your facility's credentialing information that is needed to properly setup the application for use by your facility.

If you do not have your credentialing file, kindly contact your nearest NHIS district/regional/CPC office to obtain one.

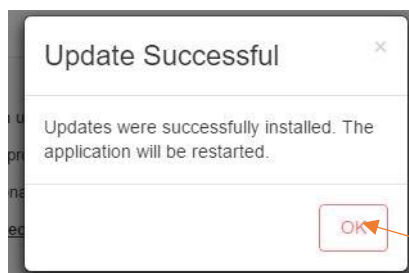
If you have your credentialing file, click on 'Pick Credential File' from below then select the file and upload to activate the application.

TEST PRIMARY HOSPITAL [03-08-06769] [PUB-PRI-CE-RX-C1] (1).ccf



 UPLOAD

4. Click on "OK" to restart the application.



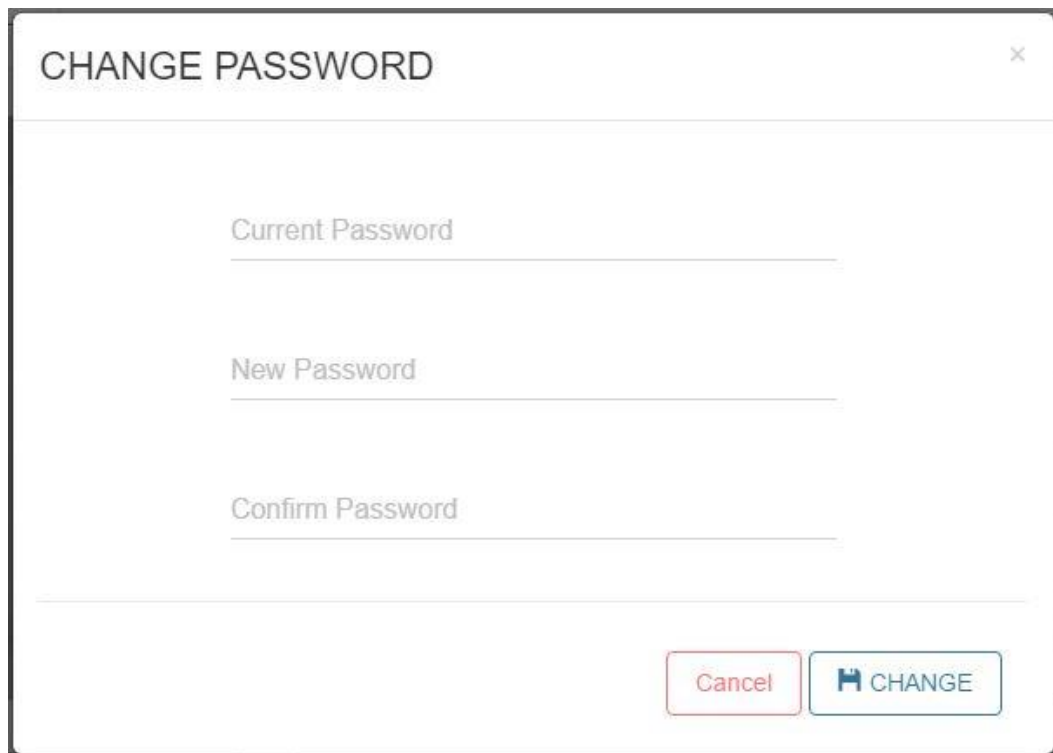
Updates can only be run by authorized users. See section 3.6 of manual

2.5 Changing Username and Password

The default password is only intended to be used for first time login. For security reasons, the application will require the first time user to change the default password to a more personal and secured one. Best practices for password setting are recommended during password setting.

To change the password, enter the current password followed by the new password.

Figure 2-4 : CLAIM-it change password screen



The image shows a web-based form titled "CHANGE PASSWORD" with a close button (X) in the top right corner. The form contains three input fields: "Current Password", "New Password", and "Confirm Password". At the bottom right, there are two buttons: a red "Cancel" button and a blue "CHANGE" button with a key icon.

CHANGE PASSWORD	
Current Password	<input type="password"/>
New Password	<input type="password"/>
Confirm Password	<input type="password"/>
<div><button>Cancel</button><button>CHANGE</button></div>	

3.0 ADDING USERS

3.1 General Overview

This section provides information on the processes involved in the creation of users as well as the various user roles and privileges available within the application.

3.2 User Roles

There are four (4) major user types that allows users to perform one or more actions within the application. Depending on the role of the user, certain features will not be available for use. The user types with their corresponding roles are showed in Table 3-1.

Table 3-1: Illustration of user types and their roles

[illegible]

By way of further explanation to the roles,

1. **The Supervisor role** is allowed to view claims, submit claims, view reports, run system updates and manage users. This role is not allowed to add or edit claims.
2. **The Admin role** is allowed to perform all activities within the application excluding claims submission. The Entry Admin role also has the same privileges.
3. **The Entry Clerk role** is allowed to view claims, add and edit claims as well as export and import claims. The entry clerk cannot delete claims, neither can it view reports, run updates or manage users.
4. **The Insurance Officer role** is the highest role in the application. Hence every feature of the application can be assessed by the Insurance Officer role.

3.3 Creating Users

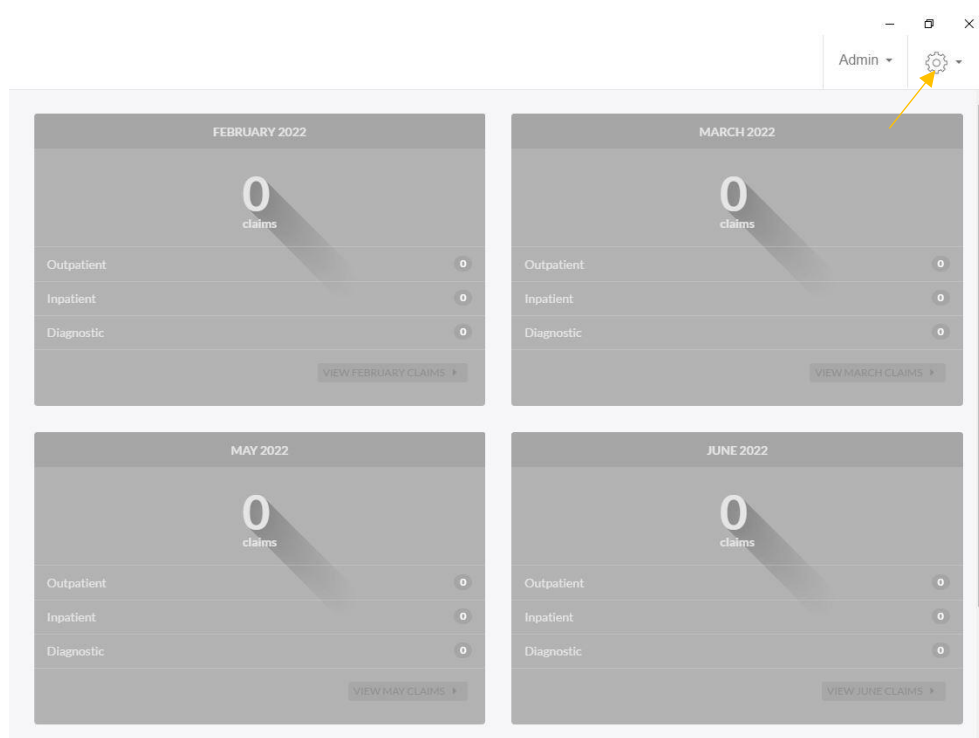
To create a user, follow the steps below;

1. Log into the application with an admin account. i.e. the default admin account or an account that has the privileges of adding users. (refer to Table 3-1).



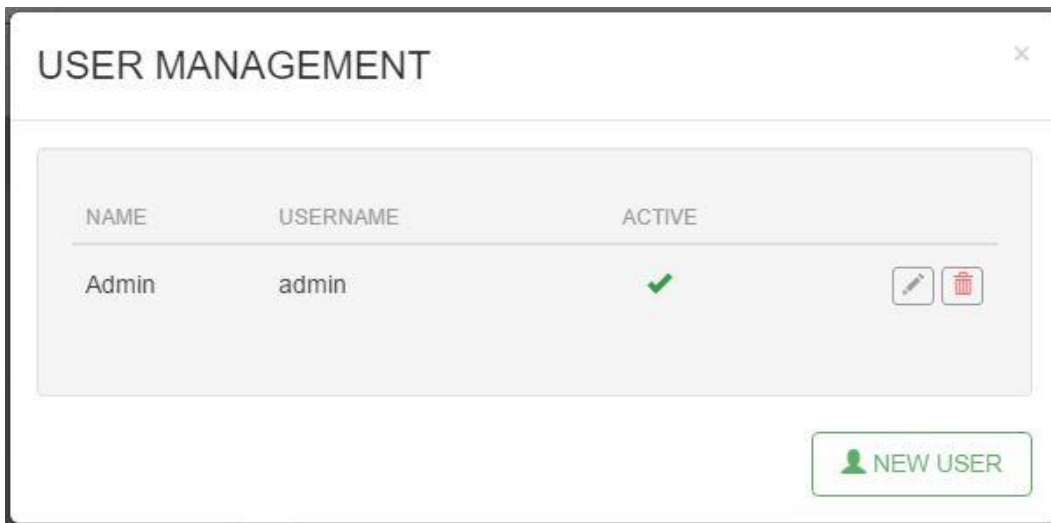
2. Click on the settings menu located at the top right corner of the homepage.(Figure 3-1)

Figure 3-1: Options menu





3. Click on **“Manage Users”**. This will open a window that shows the list of existing users and a button to add a new user. Refer to Figure 3-2.

Figure 3-2: User management option



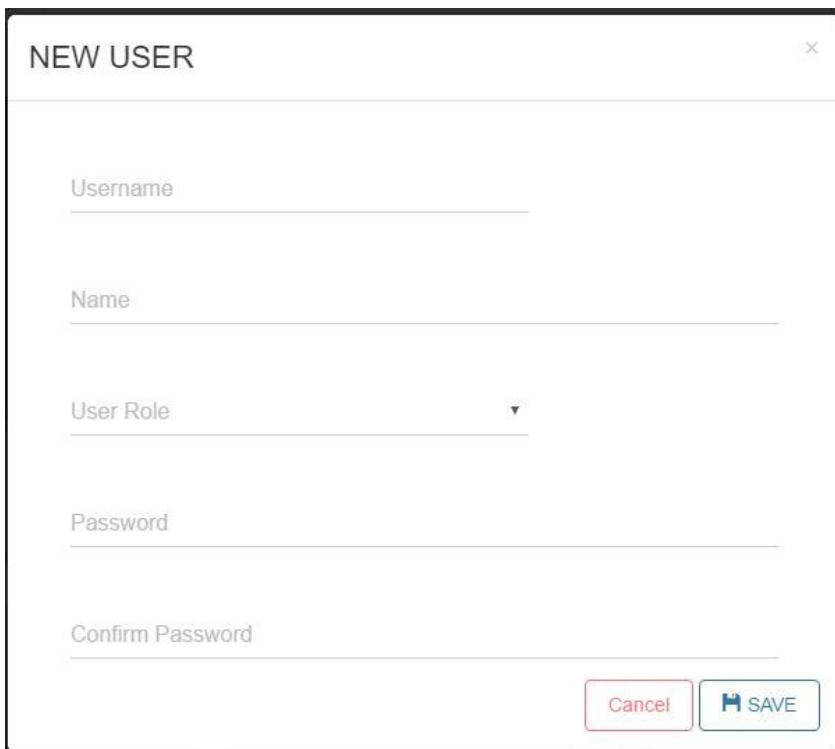
The 'USER MANAGEMENT' window displays a table with the following data:

NAME	USERNAME	ACTIVE	
Admin	admin	✓	 

A 'NEW USER' button with a person icon is located at the bottom right of the window.

4. Click on **“New User”**. This action opens a form similar to Figure 3-3

Figure 3-3: User addition form

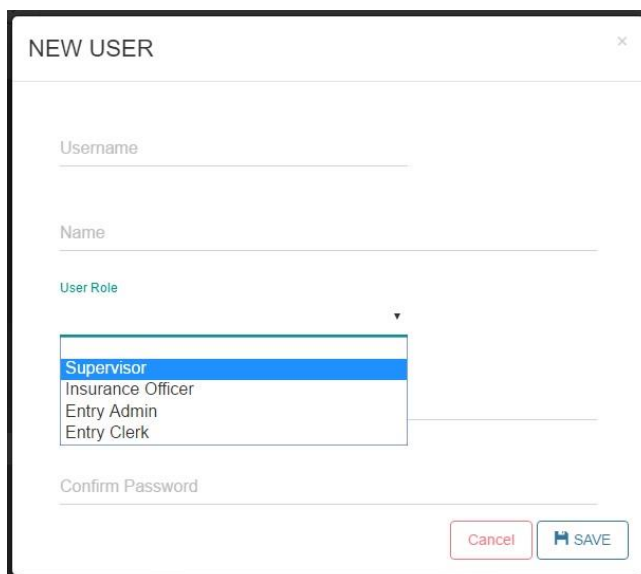


The 'NEW USER' form contains the following fields and controls:

- Username:
- Name:
- User Role: (dropdown menu)
- Password:
- Confirm Password:
- Buttons: and

5. Fill the user addition form with the right details.
 - a. The Username should be one word and can contain only numbers and alphabets.
 - b. The Name field may contain the full name of the user or a suitable description for the user.
 - c. The Role option provides for selection, all the user roles mentioned in section 3.1. (Figure 3-4)

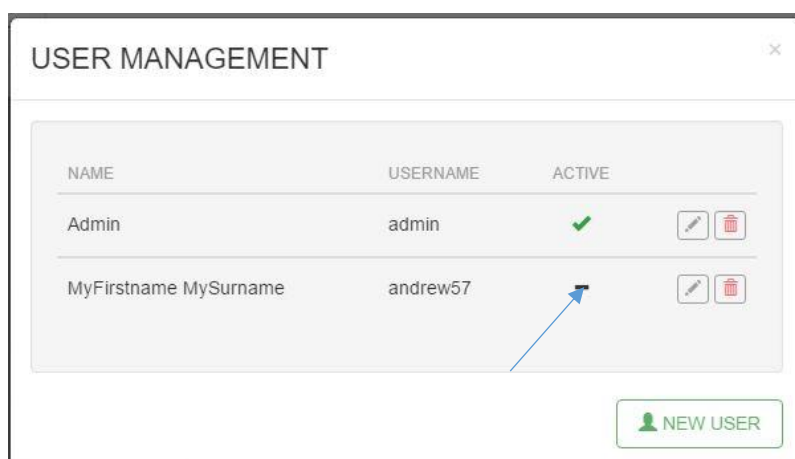
Figure 3-4: User role selection







The screenshot shows a 'NEW USER' form with the following fields: Username, Name, User Role (dropdown menu), and Confirm Password. The dropdown menu is open, showing the following options: Supervisor, Insurance Officer, Entry Admin, and Entry Clerk. The 'Supervisor' option is highlighted. At the bottom right, there are 'Cancel' and 'SAVE' buttons.

- d. Enter a password and repeat the same password.
6. Click on **“Save”** to save new user or **“Cancel”** to terminate the user addition process.
7. The final step is user activation. To do this click on the button indicated by the arrow in Figure 3-5. This will mark the user as active.

Figure 3-5: Activating a user



The screenshot shows a 'USER MANAGEMENT' table with the following columns: NAME, USERNAME, and ACTIVE. The table contains two rows of data. A blue arrow points to the 'ACTIVE' column for the user 'MyFirstname MySurname'.

NAME	USERNAME	ACTIVE	
Admin	admin	✓	 
MyFirstname MySurname	andrew57		 

At the bottom right, there is a 'NEW USER' button with a person icon.

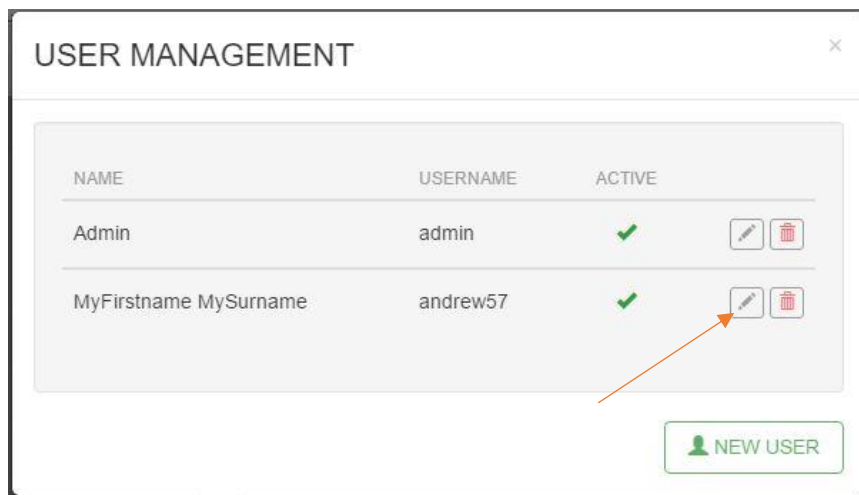
3.4 Editing Users

The steps for editing users are much similar to that for user creation. To do this activity;



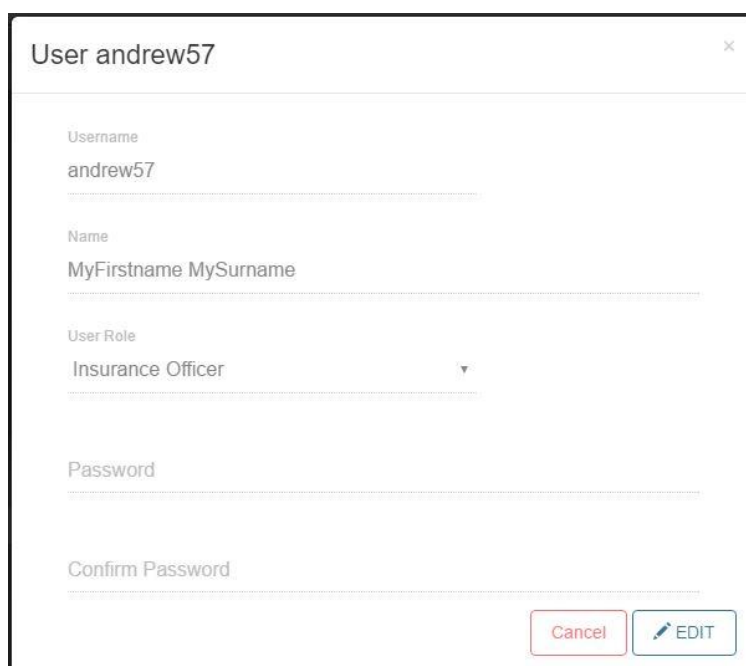
1. Click on the settings menu and click on **“Manage Users”**.
2. Look through the list of users in the pop-up window to locate the user to be edited.
3. Click on the edit icon as shown by the arrow in Figure 3-6

Figure 3-6: List of users



4. Click on **“Edit”** in the new window as shown in Figure 3-7. This exposes the various fields for editing.

Figure 3-7: User edit form



User andrew57

Username
andrew57

Name
MyFirstname MySurname

User Role
Insurance Officer

Password

Confirm Password

5. Click on **“Save”** once the necessary changes have been effected.

3.5 De-activating/Blocking Users

To block a user, do the following;

1. Click on settings, then on **“Manage Users”** to show the list of users in the application.
2. Click on the activate icon indicated by the arrow in Figure 3-8 to de-activate the user. A change in the symbol from correct sign to the hyphen symbol signifies a de-activated user.(Figure 3-9)

Figure 3-8: List of users with arrow showing the active/de-activate toggle button.

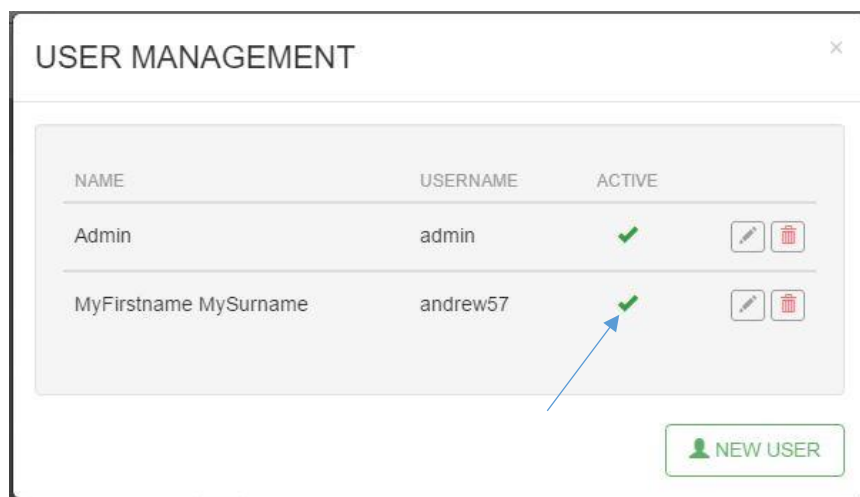
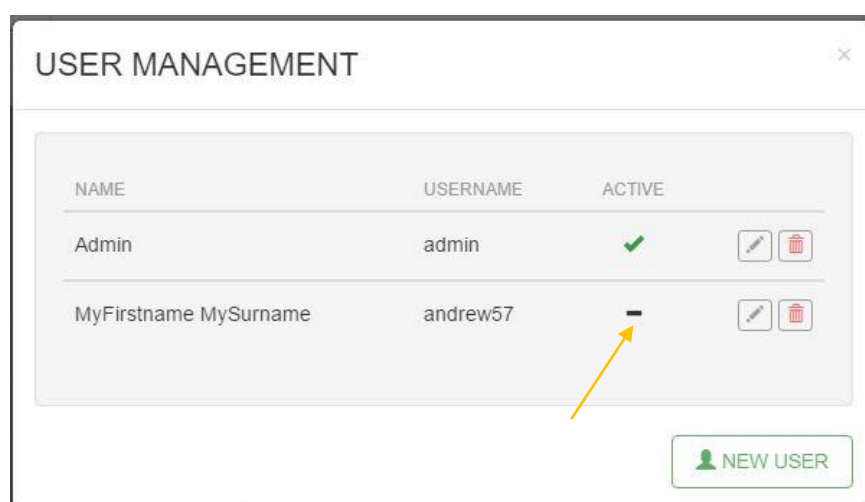


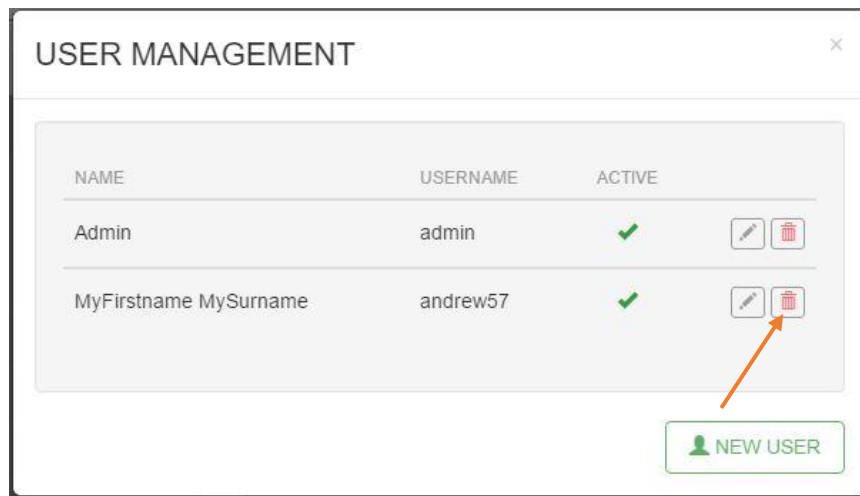
Figure 3-9: List of users with arrow showing a de-activated user.



1.3 Deleting Users

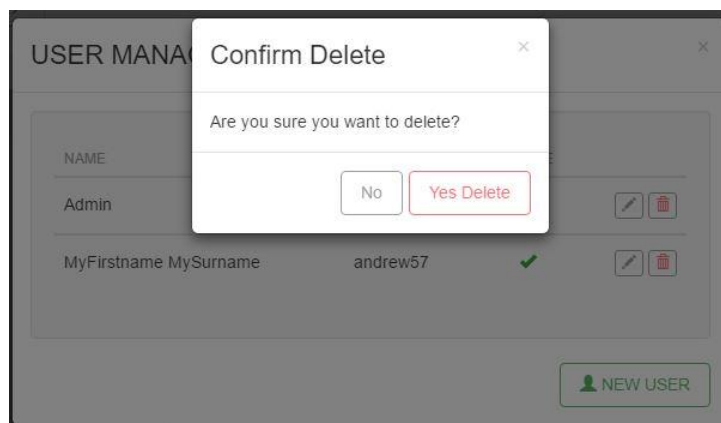
To delete users click on the delete icon next to the edit button/icon (Figure 3-10).

Figure 3-10: User management with arrow showing the delete button



This action will request for a confirmation of delete as shown in Figure 3-11.

Figure 3-11: Deletion confirmation



4.0 USING THE SYSTEM

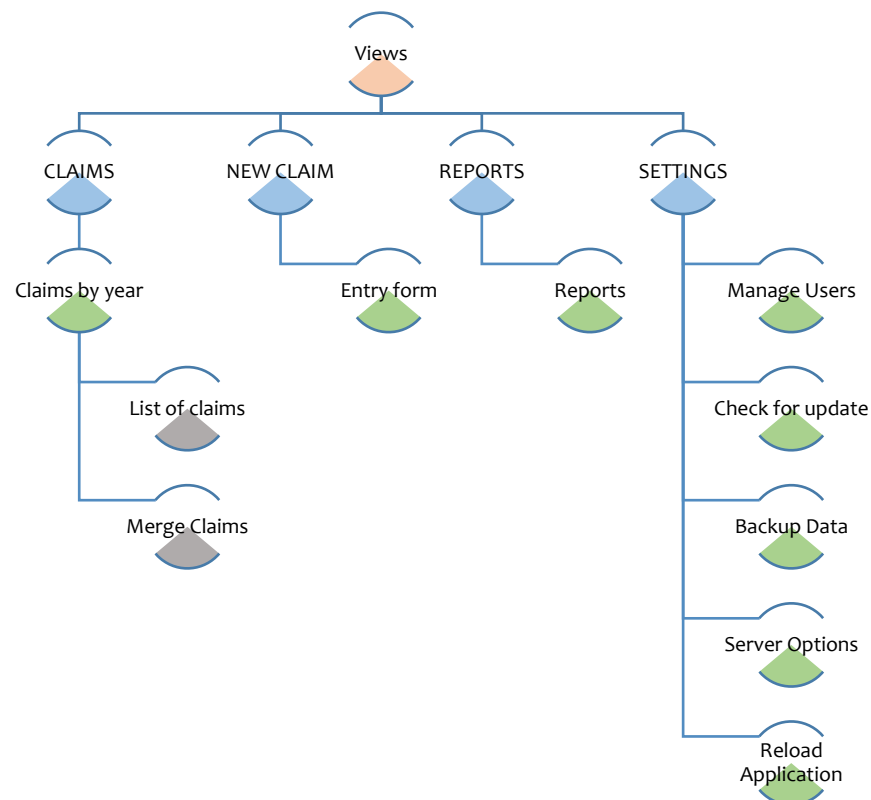
4.1 General Overview

This section provides a detailed description of all the features of the application.

4.2 General Outlook

The application has four (4) major views or menus namely **Claims, New Claim, Reports and Settings**. Figure 4-1 shows a navigation flow through the various views of the application.

Figure 4-1: Navigation flow through the various vies of the application

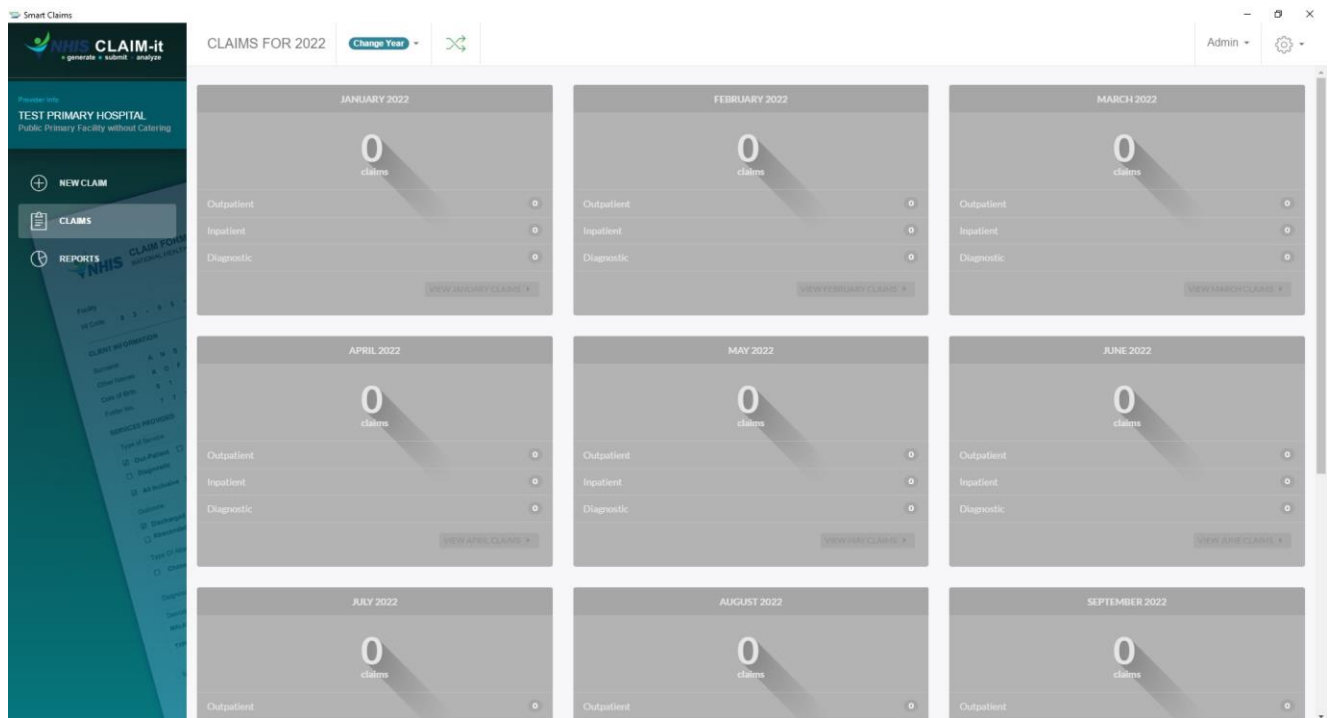


Additionally, the left panel of the home screen also provides information on the facility name, facility type, prescribing level of the facility, the login status of the user, entry and performance statistics.

4.2.1 Home Screen and Navigation of views

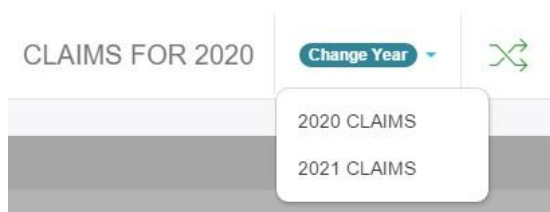
Figure 4-2 illustrates the home screen also representing the “**Claims**” menu of the application.

Figure 4-2: Home screen of the application with no claims data



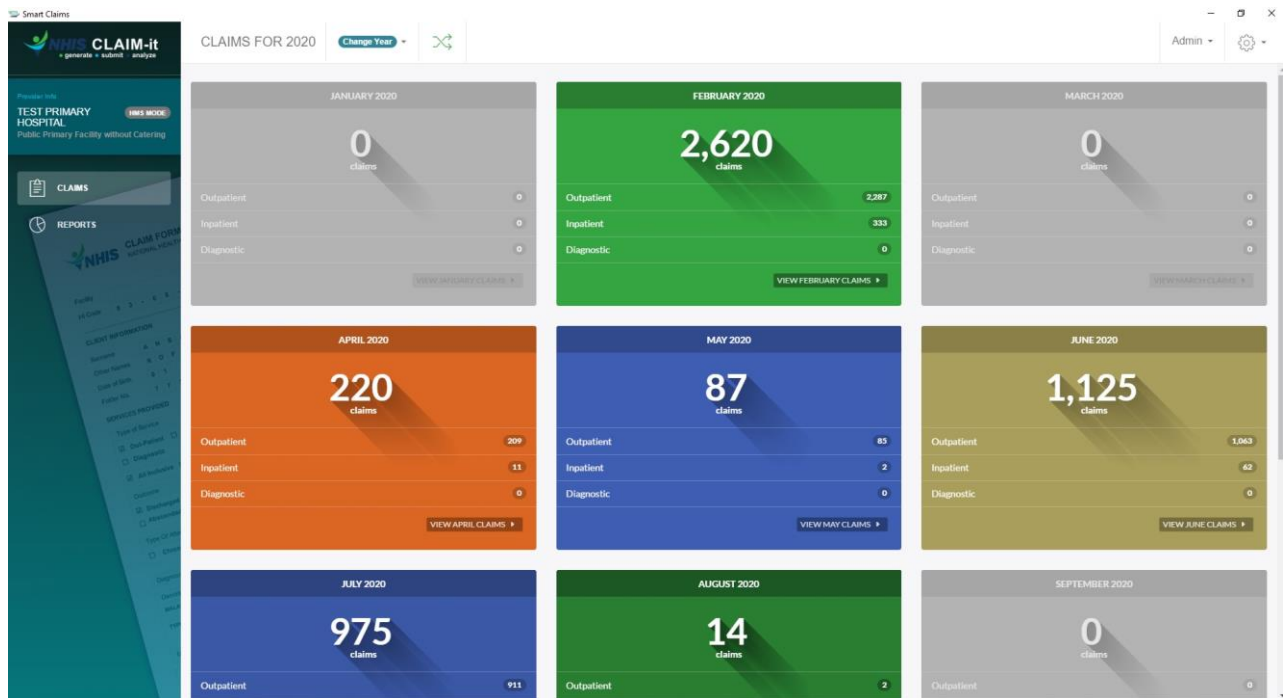
As observed in the figure above, claims are visualized by year and month. By default the application loads claims data for the current year. The year under view can be seen at the top corner, leftward of the home screen. To change the year of view, click on “**Change Year**” and select the year of interest (Figure 4-3). However, it must be noted that the drop down list only contains the list of years for which claims have been entered.

Figure 4-3 : Drop down menu for changing year in view



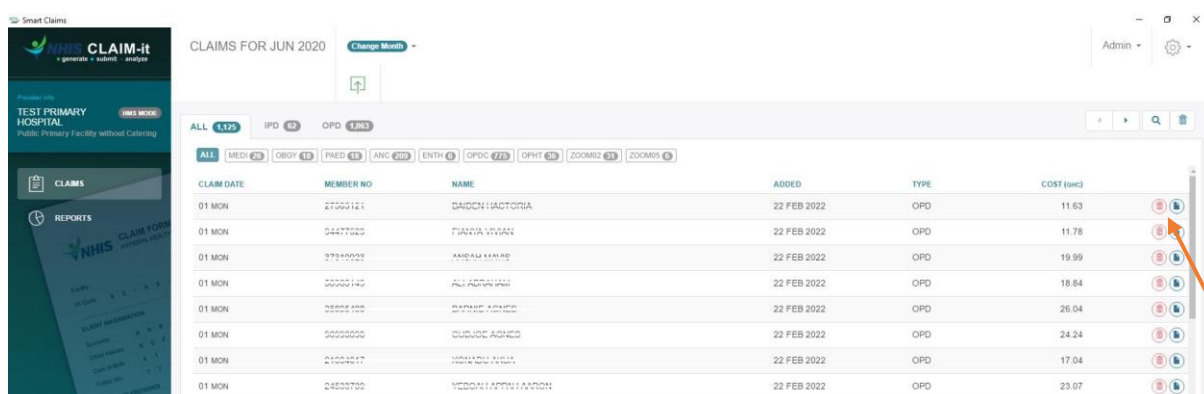
Months with no claims data are greyed out as seen in Figure 3-2. However, months with claims data have a coloured background with a summary of the volumes per type of service of data captured for that month (Figure 4-4).

Figure 4-4: Home screen of the application with claims data



To view the list of claims for any month, click on the month of interest. Claims are grouped according to the various types of services. Figure 4-5 shows the list of claims for the month of June 2020.

Figure 4-5: List of claims for a month



As can be observed in Figure 4-5, each service type has a tab which in turn provides information on the total volume of claims for that service type. The “**ALL**” tab contains all claims that have been entered for that month.

Under each major tab is a further grouping of data based on the specialty attended.

Each data row represents an entered claim specifying the date of the claim, member number, name of member, date claim was generated, type of service and the cost of the claim. The **two (2)** icons (indicated with the arrow in figure 4-5) are used to either preview or delete a claim. The icon on the left, the delete button, performs the action of deleting a claim while the icon on the right, the preview button, performs the action of opening a claim in the preview mode. A detailed description of the edit and delete features can be found in the section 4.3.


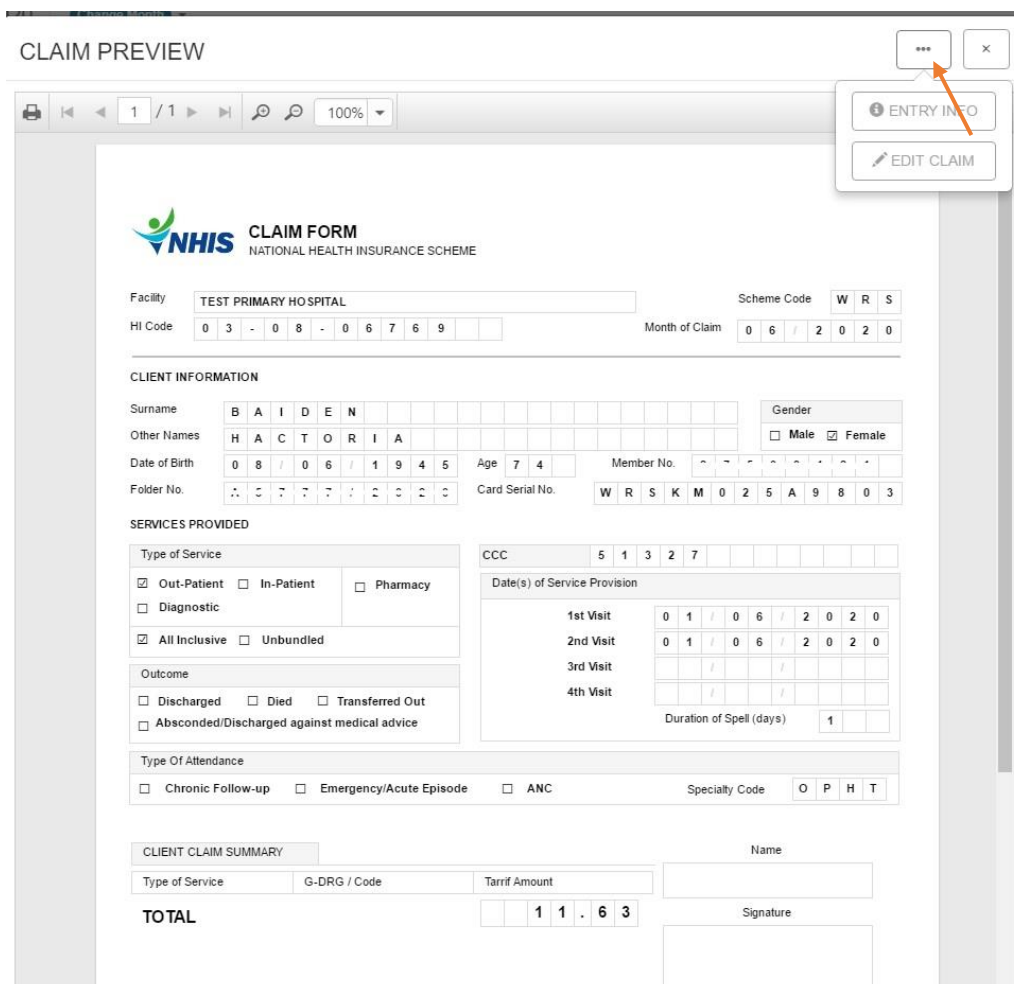
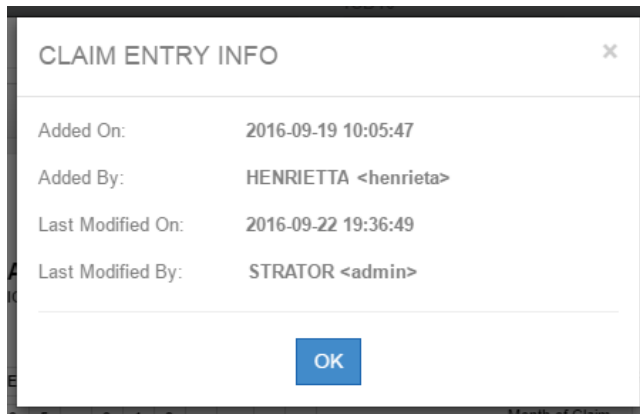
To preview a claim, click on the preview button  next to the claim of interest. This will show the claim in its traditional view (Figure 4-6). Printing of claims can be done in this view, if necessary.

Figure 4-6: Claim Preview



Clicking on the three dots at the top right corner as shown in the arrow in Figure 4-6 shows two functionalities, the “Entry Info” and “Edit Claim” button. By clicking on Entry

Info, details of all users who have interacted with the claim in view are shown as depicted in the figure below.



A screenshot of a software dialog box titled "CLAIM ENTRY INFO" with a close button (X) in the top right corner. The dialog box contains a table with the following information:

Added On:	2016-09-19 10:05:47
Added By:	HENRIETTA <henrieta>
Last Modified On:	2016-09-22 19:36:49
Last Modified By:	STRATOR <admin>

Below the table is a blue "OK" button. The dialog box is partially overlaid by a window titled "Months of Claim" at the bottom.

The Edit Claim button (Figure 4-5) also allows users to bring up the claim in the edit mode.

4.3 Generating Claims

One of the most important features of the application is to help with claims generation. This require users to generate claims that resulted from a valid attendance, using an electronic claims entry form. Figure 4-7 shows a general outlook of the claims entry form.

Figure 4-7: Claims entry form

ADD NEW CLAIM

Member Details

Member No. _____

Surname _____ Other Names _____ Folder No. _____

Gender _____ Date of Birth _____ CCC No. _____

Type of Service(s)

☐ Outpatient ☐ Inpatient ☐ Pharmacy

☐ Diagnostic ☐ UnBundled ☐ All-Inclusive

Service Outcome

☐ Discharged ☐ Died

☐ Transferred Out ☐ Absconded

Dates Of Service

1st Visit _____

2nd Visit _____

3rd Visit _____

4th Visit _____

Type of Attendance

☐ Chronic Follow-up ☐ Emergency/Acute Episode ☐ Ante-natal

☐ Post-natal

Referral Info

Referring Facility Name _____

Referral Code / CCC _____

Specialties Attended

☐ ASUR ☐ DENT ☐ ENTH

☐ MEDI ☐ OBGY ☐ OPDC

☐ OPHT ☐ ORTH ☐ PAED

☐ PSUR ☐ RSUR

Authorization Codes

Physician Name/ID _____ Pre authorization Code(s) _____

Entries

Attachments +

Drag-N-Drop Here

Comments


type comments here...

Outpatient

Inpatient

Diagnostic

Outpatient

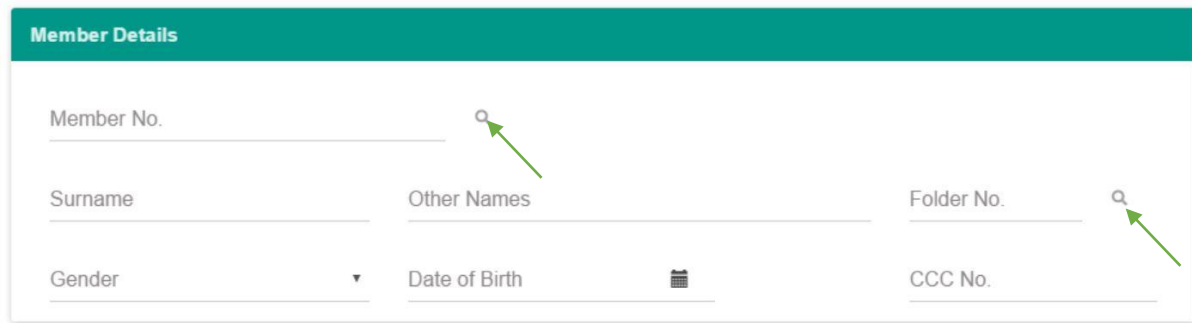
To enter claims, click on  button found on the side bar menu of the home screen. This should pop up a blank claims entry form similar in view to what is displayed above.

Entering claims requires the user to apply the NHIS claims generation guidelines with respect to providing required data as well as satisfying all other claims entry protocols. Reference should be made to the NHIS tariff operational manual for further information on claims generation guidelines and policy. The entry form has seven major sections;

1. **Patient Details section:** This section captures all patient centred details. The entry fields in this section are;
 - a. Patient name (Surname and other names)
 - b. Member number
 - c. Date of birth
 - d. Folder number
 - e. Claims Check Code (CCC)

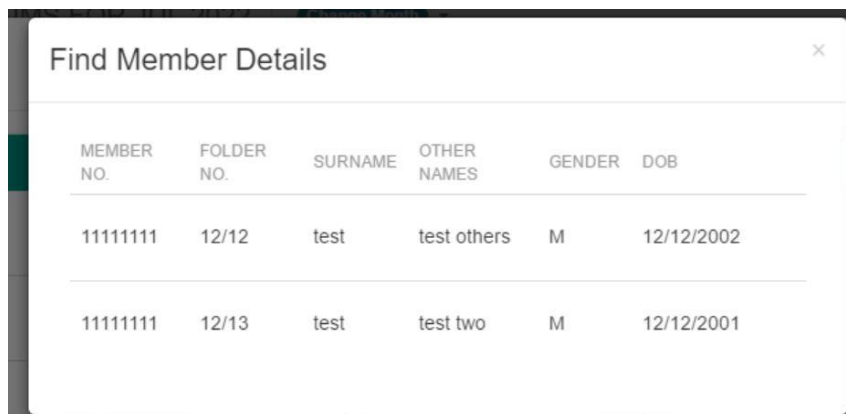
f. Card serial number

Figure 4-8: Patient detail section



The screenshot shows a form titled "Member Details" with a teal header. The form contains several input fields: "Member No.", "Surname", "Other Names", "Folder No.", "Gender" (a dropdown menu), "Date of Birth" (with a calendar icon), and "CCC No.". Two green arrows point to search icons (magnifying glasses) located next to the "Member No." and "Folder No." fields.

Users are also able to pre-populate patient member details by using the search button next to the Member no field (shown by the green arrow) upon entering the member number. Member detail pre-population is also possible using the folder number of the patient. Please note, however, that this feature is only functional if claims have ever been captured for that member. This is illustrated in the diagram below.



The screenshot shows a dialog box titled "Find Member Details" with a close button (X) in the top right corner. Inside the dialog is a table with the following data:

MEMBER NO.	FOLDER NO.	SURNAME	OTHER NAMES	GENDER	DOB
11111111	12/12	test	test others	M	12/12/2002
11111111	12/13	test	test two	M	12/12/2001

The diagram above is an illustration of member no. 11111111 having past claim entries with two different folder numbers. In this case the claim officer will have to choose the preferred record to use.

Note: Once the application detects that the age of the patient is within a three (3) month period, it prompts the user to confirm if the NHIS member number being used is that of the child or not. The age is always computed against the first date of service provision. This is illustrated in Figure 4-9.

Figure 4-9: Illustration of dependent confirmation

Member Details		
Member No. 34444444		
Surname TEST	Other Names PATIENT	Folder No.
Gender MALE	<div> Date of Birth 21/2/2022 <div> </div> </div> <div> Age: 1days </div> <div> Is the NHIA Card for this Baby? <input type="checkbox"/> YES <input type="checkbox"/> NO </div>	CCC No. 12345

2. **Service Information Section:** This section captures service and attendance details.

The entry fields in this section are;



- a. Type of service
- b. Date of service (Date of attendance and date of discharge)
- c. Outcome of service
- d. Referral details (referring facility name/ facility ID/ CCC)
- e. Specialties attended

Figure 4-10 : Service details section

Type of Service(s)	Service Outcome	Dates Of Service
<input type="checkbox"/> Outpatient <input type="checkbox"/> Inpatient <input type="checkbox"/> Pharmacy <input type="checkbox"/> Diagnostic <input type="checkbox"/> UnBundled <input type="checkbox"/> All-Inclusive	<input type="checkbox"/> Discharged <input type="checkbox"/> Died <input type="checkbox"/> Tranferred Out <input type="checkbox"/> Absconded	1st Visit 22/2/2022 2nd Visit 3rd Visit 4th Visit
Type of Attendance		
<input type="checkbox"/> Chronic Follow-up <input type="checkbox"/> Emergency/Acute Episode <input type="checkbox"/> Ante-natal <input type="checkbox"/> Post-natal		
Referral Info	Specialties Attended	
Referring Facility Name Referral Code / CCC	<input type="checkbox"/> ASUR <input type="checkbox"/> DENT <input type="checkbox"/> ENTH <input type="checkbox"/> MEDI <input type="checkbox"/> OBGY <input type="checkbox"/> OPDC <input type="checkbox"/> OPHT <input type="checkbox"/> ORTH <input type="checkbox"/> PAED <input type="checkbox"/> PSUR <input type="checkbox"/> RSUR	

3. **Procedure Section:** This section captures details on all valid procedures which were conducted. Data entry fields in this section are;
- Procedural GDRG
 - Diagnosis (ICD-10)
 - Date of service

Figure 4-11 : Procedure section

1 PROCEDURE						
#	GDRG	DESCRIPTION	DIAGNOSIS	ICD10	DATE	
1.	ZOOM07A	DRESSING AND MINOR SUTURING >=12 YRS	LACERATION OF SCALP	S01.0	22 Feb 2022	 

4. **Diagnosis Section:** This section captures details on consultations services (non-procedural) rendered to a patient. Data entry fields for this section include;
- Diagnosis GDRG
 - Diagnosis (ICD-10)

Figure 4-12 : Diagnoses section

1 DIAGNOSIS					
#	GDRG	DESCRIPTION	DIAGNOSIS	ICD10	
1.	OPDC06A	GENERAL OPD - ADULT	MALARIA	B54	 

5. **Investigation Section:** This area captures details on all investigation or diagnostic services provided to the patient. The entry fields in this section are;
- Diagnostic GDRG
 - Date of service

Figure 4-13 : Investigation section

1 INVESTIGATION				
#	GDRG	DESCRIPTION	DATE	
1.	INVE34E	URINE C/S	22 Feb 2022	 

6. **Medicines Section:** This area captures all prescriptions and medicines dispensed to a patient. The data entry fields for this section are;
- Medicine name or code
 - Prescription (dose, duration and frequency)
 - Quantity dispensed
 - Date of service

1 MEDICINE 				
#	CODE	DESCRIPTION	QTY	DATE
1	PARACETA1	PARACETAMOL TABLET, 500 MG <small>Rx: 1000 mg x tid x 5 Days</small>	30	22 Feb 2022

7. **Pre-authorization Section:** This area captures all pre-authorization details for all services used for which pre-authorization was required. Details specified here are;
- Prescriber ID
 - Pre-authorization codes (separated by comma's)

Figure 4-14 : Pre-authorization section

Authorization Codes	
Physician Name/ID	Pre-authorization Code(s)

Referral details are required for all referral services. E.g. diagnostic and pharmacy only

Some data entry utilities have been made available to aid in movement from one section of the entry form to another. This is to help limit the need to scroll through the various sections of the form. This utility is located at the top right section outside the claims entry form as illustrated in Figure 4-14.

Figure 4-15: Data entry utility

UPDATE CLAIM

Member Details

Member No.

44543232

Surname

PATIENT

Other Names

TEST

Folder No.

212/12

Gender

FEMALE

Date of Birth

23/11/2000

CCC No.

12343

Age: 20yrs

Type of Service(s)

☒ Outpatient
 ☐ Inpatient
 ☒ Pharmacy
 ☐ Diagnostic
 ☐ UnBundled
 ☒ All-Inclusive

Service Outcome

☒ Discharged
 ☐ Died
 ☐ Transferred Out
 ☐ Absconded

Dates Of Service

1st Visit

12/12/2020

2nd Visit

3rd Visit

4th Visit

Type of Attendance

☐ Chronic Follow-up
 ☒ Emergency/Acute Episode
 ☐ Ante-natal
 ☐ Post-natal

Specialties Attended

Entries

Add Procedure

Add Diagnosis

Add Investigation

Add Medicine

Attachments

Drag-N-Drop Here

Add Comments

Hovering over the icon displays a description of its functionality. Figure 4-15 shows the icons and their corresponding functionality descriptions.

Figure 4-16: Entry utility descriptions

Jump to member details section

Jump to service details section

Jump to procedure details section

Jump to diagnosis detail section

Jump to medicine detail section

4.3.1 Entering member details

Entries of member/patient details naturally marks the beginning of all claim entries. Data entry in this section is as simple as typing out the required details into the input boxes provided.

The age of a member is calculated as the difference between the first date of service and member's date of birth.

4.3.2 Entering Dates

Date entries are required at the member details, procedure, investigations and medicines section. Dates can either be entered directly into the date input box or selected using the date picker. For direct entries, dates can be entered in one of three (3) different ways as illustrated below;

1. **12 Jun 2016**
2. **01/06/2016**
3. **1/6/2016**

To use the date picker, click on the “**calendar icon**” to the right of the date input box. This will open a date picker window for the user to navigate and select the preferred date. This is illustrated in figure 4-16.

Figure 4-17: Date picker for date selection



4.3.3 Entering Service details

The service section of the form requires the user to provide details on the type of service, date of service, type of attendance, outcome of the service, specialties attended and referral details if required.

In cases where the patient accessed care from more than one specialty, the user is free to check as many specialties as applicable.

Figure 4.10 illustrates the service section of the claim form.

Figure 4-18: The service section of the claim form

Type of Service(s)	Service Outcome	Dates Of Service
<input checked="" type="checkbox"/> Outpatient <input type="checkbox"/> Inpatient <input type="checkbox"/> Diagnostic <input checked="" type="checkbox"/> Pharmacy <input type="checkbox"/> UnBundled <input checked="" type="checkbox"/> All-Inclusive	<input checked="" type="checkbox"/> Discharged <input type="checkbox"/> Died <input type="checkbox"/> Tranferred Out <input type="checkbox"/> Absconded	1st Visit 12/12/2020 2nd Visit 3rd Visit 4th Visit
Type of Attendance		Specialties Attended
<input type="checkbox"/> Chronic Follow-up <input checked="" type="checkbox"/> Emergency/Acute Episode <input type="checkbox"/> Ante-natal <input type="checkbox"/> Post-natal		<input type="checkbox"/> ASUR <input type="checkbox"/> DENT <input type="checkbox"/> ENTH <input type="checkbox"/> MEDI <input type="checkbox"/> OBGY <input checked="" type="checkbox"/> OPDC <input type="checkbox"/> OPHT <input type="checkbox"/> ORTH <input type="checkbox"/> PAED <input type="checkbox"/> PSUR <input type="checkbox"/> RSUR
Referral Info		
Referring Facility Name		
Referral Code / CCC		

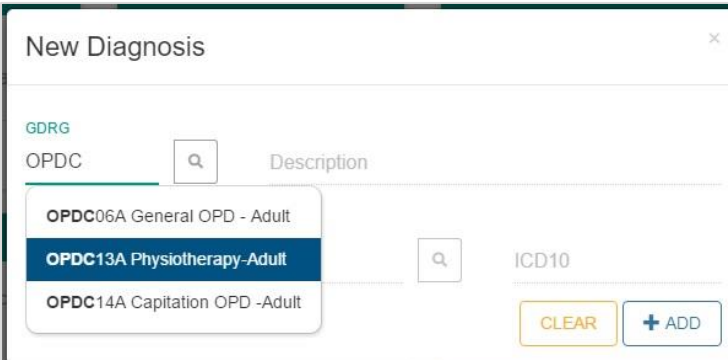
The information provided at the member and service section of the claim form determines the type of GDRGs that will be available for selection. Eg. If the age of the patient is < 12yrs, type of service is OPD and specialty attended is OPDC, then only OPDC GDRGs with a split of C will be available for selection at the diagnosis section of the claim form.

4.3.4 Entering GDRGs

Entry of GDRGs are required at the procedure, diagnosis and investigation sections of the form and the processes for entry are the same. A GDRG can be selected in two (2) ways;

1. Type either the GDRG code or its description in the GDRG input box. A dropdown picker (list) automatically appears, once the user starts entering any text. The dropdown makes available and does an automatic search for GDRGs based the available pre-filtered GDRGs based on data entered at the member and service details section of the form. The more you type, the more detailed the search.

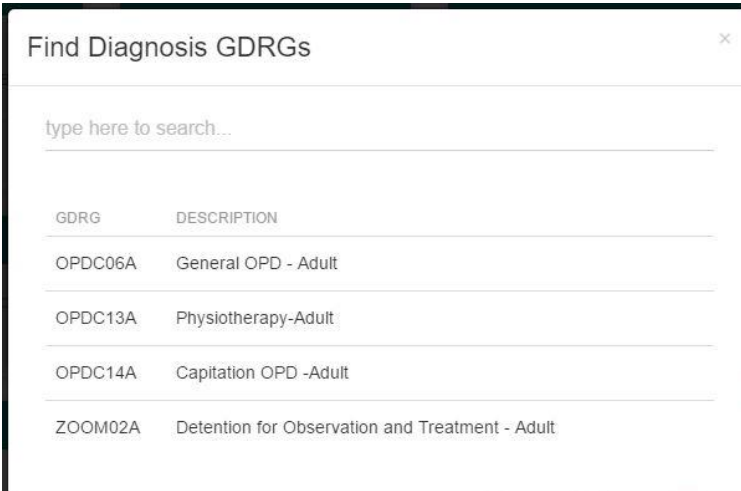
Figure 4-19 : GDRG Entries



The screenshot shows a 'New Diagnosis' form. On the left, there is a 'GDRG' section with a dropdown menu. The dropdown is open, showing three options: 'OPDC06A General OPD - Adult', 'OPDC13A Physiotherapy-Adult' (which is highlighted), and 'OPDC14A Capitation OPD -Adult'. To the right of the dropdown is a search icon (magnifying glass) and a 'Description' input field. Further right is an 'ICD10' input field with its own search icon. At the bottom right, there are two buttons: 'CLEAR' and '+ ADD'.

2. Alternatively, click on the magnifying glass icon next to the GDRG input box. This should popup a list of pre-filtered GDRGs with a search area at the top of the list. Typing the required GDRG code or its description in the search area automatically sorts the list based on the information provided in the search area. The GDRG is then selected by clicking on the preferred GDRG.

Figure 4-20 : GDRG Selection



The screenshot shows a 'Find Diagnosis GDRGs' popup window. At the top, there is a search bar with the placeholder text 'type here to search...'. Below the search bar is a table with two columns: 'GDRG' and 'DESCRIPTION'. The table contains five rows of data:

GDRG	DESCRIPTION
OPDC06A	General OPD - Adult
OPDC13A	Physiotherapy-Adult
OPDC14A	Capitation OPD -Adult
ZOOM02A	Detention for Observation and Treatment - Adult

Upon selecting the required GDRGs, the GDRG code is displayed in the GDRG input box while the description of the GDRG is either displayed below the diagnosis input box as observed at the diagnosis section or within a text box, in the case of procedures.

4.3.5 Entering Diagnosis/ICD-10s

Entry of diagnosis is required for every entry of GDRGs done at the procedure and diagnosis section of the form. The investigation section does not require the input of diagnosis (ICD-10s) and hence has no diagnosis input box.

Similar to the selection of GDRGs, to input diagnosis the user may do either of the following;

1. Type either the ICD-10 code or its description of the diagnosis in the diagnosis input box. A dropdown picker (list) automatically appears once the user starts entering any text. The dropdown does an automatic search for diagnosis based on what has been typed so far. The more you type, the more detailed the search. Claim officers can also search for applicable GDRGs for any diagnosis of interest. For instance, if “hypertension” is entered as the diagnosis, the application will automatically list all applicable GDRGs linked to that diagnosis. This feature serves as a quick reference and utility for Claim Officers when it comes to selecting diagnosis and their related GDRGs and vice versa.

Figure 4-21: Adding diseases using direct search

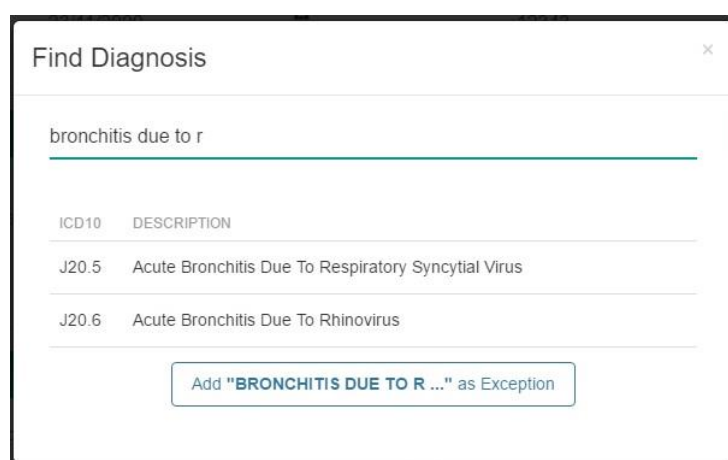
The screenshot shows a web form titled "New Diagnosis" with a close button (X) in the top right corner. The form is divided into two main sections. The top section has two input fields: "GDRG" with the value "OPDC06A" and a magnifying glass icon, and "Description" with the value "General OPD - Adult". The bottom section has two input fields: "Diagnosis" with the value "malaria" and a magnifying glass icon, and "ICD10" with the value "B54". Below the "Diagnosis" input field, a dropdown list is visible, showing the following options: "CEREBRAL MALARIA" (highlighted in blue), "CONGENITAL FALCIPARUM MALARIA", "MALARIA", and "MALARIA DUE TO SIMIAN PLASMODIA". To the right of the dropdown list is a button labeled "+ ADD".

2. An extended search can be done by clicking on the magnifying glass icon next to the input box. This should popup a list of diseases (ICD-10s) with a search area at the top of the list. Typing the required diagnosis or ICD-10 code in the search box,

automatically sorts the list based on the information provided. The diagnosis is then selected by clicking on the preferred diagnosis.

When a diagnosis is not found in the search box, the user has the option of including the diagnosis as an “**exception diagnosis**”. This simply means that, diagnosis was not found in the list provided but was exactly what was diagnosed. The exception diagnosis will be available for selection the next time another claim is being captured.

Figure 4-22: Adding diseases using extended search/ Adding exception diagnosis



The screenshot shows a window titled "Find Diagnosis" with a search bar containing "bronchitis due to r". Below the search bar is a table with two columns: "ICD10" and "DESCRIPTION". The table lists two results: "J20.5 Acute Bronchitis Due To Respiratory Syncytial Virus" and "J20.6 Acute Bronchitis Due To Rhinovirus". At the bottom of the window, there is a button labeled "Add 'BRONCHITIS DUE TO R ...' as Exception".

ICD10	DESCRIPTION
J20.5	Acute Bronchitis Due To Respiratory Syncytial Virus
J20.6	Acute Bronchitis Due To Rhinovirus

Add "BRONCHITIS DUE TO R ..." as Exception

The selection of procedural GDRGs in the procedure section results in the pre-sorting of diagnosis/ICD-10 code as specified in the ANNEX C of the NHIS tariff operational manual. However, this doesn't prevent users from selecting other diagnosis using the processes specified in step 2 above.

4.3.6 Entering Medicines

Capturing of medicine is quite similar to selecting GDRGs. Hence steps 1 and 2 for entering GDRGs also applies to the selection of medicines.

In capturing the prescription, the dose, frequency and duration needs to be captured. The dose is prepopulated based on the type of medicine selected. Similarly, the frequency and duration inputs are also prepopulated with the necessary data as per prescription standards. An example of a typical prescription is 250mg x tds x 5 days.

Figure 4-23: Making medicine and prescription entries

The screenshot shows a 'New Medicine' form with the following fields and values:

Code	Description
PARACETA1	Paracetamol Tablet, 500 mg

Dispensed Qty / Unit= Tablet	Dispensary Date
30	23/2/2022

Prescription		
Dose	Frequency	Duration
1000 mg	tds	5 Days

At the bottom right of the prescription section, there is a pencil icon. An orange arrow points to this icon. Below the prescription section are two buttons: 'CLEAR' and '+ ADD'.

Considering that not all medicines have a definite prescription, partial prescriptions are allowed for some medicine entries.

The prescribing level of the health facility determines the list of medicines available for selection during data entry.

Instances where the prescription doesn't fit the traditional dose, frequency, duration structure, users are allowed to make free text prescription entries. The feature is activated by clicking on the pencil icon, indicated by the arrow in figure 4-22. This will open a window, illustrated in Figure 4-24, that will allow for the entry of prescriptions in the desired way. The exception section of the form, allows for free text entry of prescriptions. E.g. "2 puffs when necessary".


Figure 4-24: Alternative prescription entry

The screenshot shows a window titled 'Rx Salbutamol Inhaler, 100 microgram/metered dose, 200 doses'. The window contains the following fields:

Dose	Frequency	Duration

Below these fields is a section labeled 'Exception Prescription' with the text '2 puffs as and when necessary'. At the bottom of the window are two buttons: 'SAVE' and 'CLEAR'.

4.3.7 Adding Entries

The procedure, diagnosis, investigation and medicine sections of the form allows users to make multiple entries where necessary. The  button at the top right corner of each section allows users to add entries. The display for each entry form is subject to the data requirements for that section.



To add an entry to the list of entries, provide all required data for that section and click on the  button to add the GDRG/Medicine and its corresponding details to the list. To clear all data that have been provided for an entry, click on the  button to clear the entries. Figure 4-24 is an illustration of this functionality.

Figure 4-25: Adding entries (excerpts from diagnosis entry)

2 DIAGNOSES

#	GDRG	DESCRIPTION	DIAGNOSIS	ICD10	
1.	OPDC06A	GENERAL OPD - ADULT	ABDOMINAL HERNIA	K46	<div><div></div><div></div></div>
2.	OPDC06A	GENERAL OPD - ADULT	ACUTE BRONCHITIS	J20.9	<div><div></div><div></div></div>

4.3.8 Editing and Deleting Entries


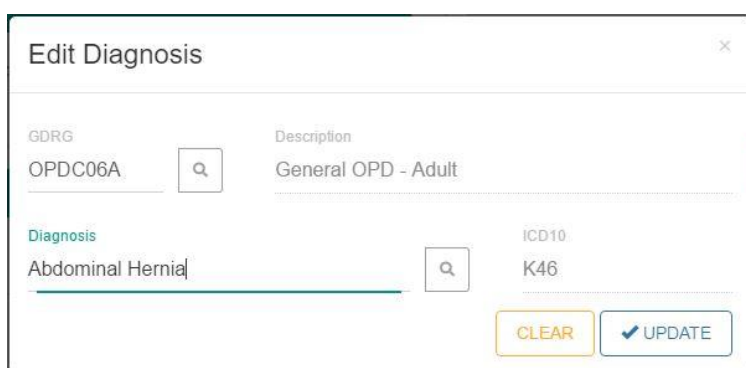

Entries made can be edited or deleted from the list of entries. The edit or delete buttons are found at the right side of each entry. To edit an entry, click on the edit button (pencil icon shown by the green arrow in Figure 4-25 above). This loads the data for that entry and allows for changes to be made. Click on the  button to complete the update. This is illustrated in Figure 4-25.

Figure 4-26: Editing entries



Edit Diagnosis


GDRG

OPDC06A 

Description

General OPD - Adult

Diagnosis


Abdominal Hernia 

ICD10

K46

CLEAR

UPDATE

To delete an entry simply click on the “**trash can icon**”, . It must however be noted that deletion of an entry is an **irreversible action**, hence the need for **caution**.

The editing and deletion features are available at the procedure, diagnosis, investigation and medicine sections as well.

4.3.9 Attachment of Documents

There are instances where it becomes necessary to attach supporting documents to a claim. Supporting documents includes but not limited to prescriptions, lab results and lab requests. For instance, the use of some medicines on the NHIS medicines list requires the attachment of lab results to support the claim.

To attach a supporting document follow the following steps;


1. Go to the attachments section of the entry form and click on  icon as illustrated in Figure 4-26

Figure 4-27 Attachment section of entry form



2. This will open an explorer window, that allows users to select the appropriate file to attach.
3. After selecting the file to attach, the user will be required to select the type or category (prescription, lab request, scan etc) of attachment.

Figure 4-28: Attachment Details



- Click on **“Attach”** button to save attached file. This will look similar to Figure 4-28, showing the name of the attached file and a button to delete the attachment. However, a delete confirmation will be required before deletion. The user can click on the attached file to view the document as well. Optionally, the user can also add a comment to the attachment if necessary. Illustrated in Figure 4-28.



Figure 4-29: View for an attached file



- To attach another document, repeat the process.

4.4 Saving Claims

Once all entries have been made, the next action is to save the claim. Click on the

 or  button to save a claim. The latter will save the claim and make available another blank claim form for a new entry.

Upon clicking on the save button, the application validates the entries that have been done against the set NHIS claims generation guidelines and protocols as well as data quality and validity rules. Should the application encounter any error(s) within the entries, such will be communicated to the user on the validation results pane found at the right side of the claims entry form (indicated by arrow in Figure 4-26). By clicking on the error message, the application highlights the field contributing to the error.

Figure 4-30: Saving claims showing validation pane

UPDATE CLAIM

Member Details

Member No.

44543232

Surname

PATIENT

Other Names

TEST

Folder No.

212/12

Gender

FEMALE

Date of Birth

23/11/2000

CCC No.

12343

Age: 20yrs

Type of Service(s)

☒ Outpatient

☐ Inpatient

☐ Diagnostic

☐ Pharmacy

☐ UnBundled

☒ All-Inclusive

Service Outcome

☐ Discharged

☐ Died

☐ Transferred Out

☐ Absconded

Dates Of Service

1st Visit

12/12/2020

2nd Visit

3rd Visit

4th Visit

Type of Attendance

☐ Chronic Follow-up

☒ Emergency/Acute Episode

☐ Ante-natal

☐ Post-natal

Specialties Attended

ATTENTION

Service outcome must be provided

One or more specialties attended must be provided

Entries

Add Procedure

Add Diagnosis

Add Investigation

Attachments

Drag-N-Drop Here

Add Comments

The application computes the cost of the claim and saves it once it passes validation.

The Principal GDRG is required for all IPD cases especially those involving multiple GDRGs. The selected GDRG cannot be outside the list of GDRGs used on the claim form.

Figure 4-31: Successfully saved claim

PATIENT TEST

Member No.

44543232

Date of Birth

23 Nov 2000

Age

20yrs

Gender

F

CCC No.

12343

Folder No

212/12

Claim Month

DEC 2020

CLAIM SUMMARY

TYPE OF SERVICE	GDRG/CODE	AMOUNT
Outpatient	OPDC06A	12.24

Total

GHC 12.24

PREVIEW

EDIT

CLOSE SUMMARY



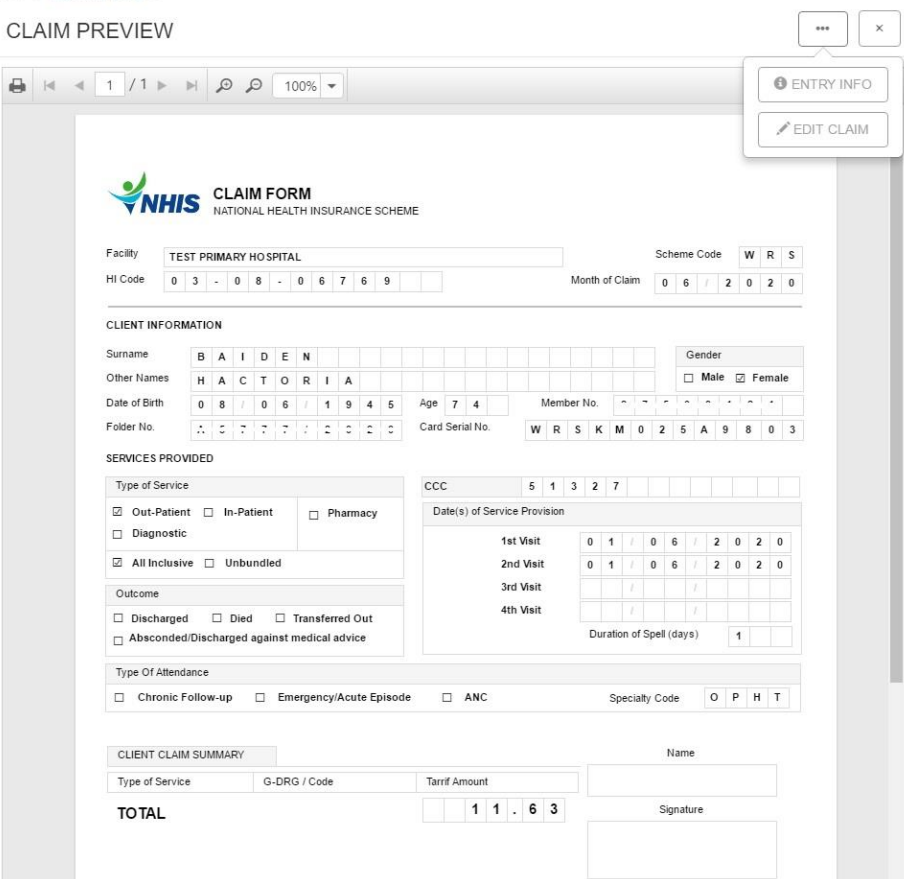
As shown in Figure 4-27, a saved claim can be edited directly using the  button or previewed using the  button. A previewed claim looks similar to Figure 4-28

Figure 4-32: Claims preview page




The screenshot shows a web application window titled "CLAIMS PREVIEW". The interface includes a top navigation bar with a printer icon, navigation arrows, a page indicator "1 / 1", a magnifying glass icon, and a zoom level "100%". On the right side of the top bar, there are two buttons: "ENTRY INFO" and "EDIT CLAIM".


The main content area displays the "NHIS CLAIM FORM NATIONAL HEALTH INSURANCE SCHEME". The form is divided into several sections:

- Facility:** TEST PRIMARY HOSPITAL
- Scheme Code:** W R S
- HI Code:** 0 3 - 0 8 - 0 6 7 6 9
- Month of Claim:** 0 6 / 2 0 2 0
- CLIENT INFORMATION:**
 - Surname:** B A I D E N
 - Other Names:** H A C T O R I A
 - Date of Birth:** 0 8 / 0 6 / 1 9 4 6
 - Age:** 7 4
 - Member No.:** - - - - -
 - Folder No.:** - - - - -
 - Card Serial No.:** W R S K M 0 2 5 A 9 8 0 3
 - Gender:** ☐ Male ☒ Female
- SERVICES PROVIDED:**
 - Type of Service:**
 - ☒ Out-Patient ☐ In-Patient ☐ Pharmacy
 - ☐ Diagnostic
 - ☒ All Inclusive ☐ Unbundled
 - Outcome:**
 - ☐ Discharged ☐ Died ☐ Transferred Out
 - ☐ Absconded/Discharged against medical advice
 - Type Of Attendance:**
 - ☐ Chronic Follow-up ☐ Emergency/Acute Episode ☐ ANC
 - Specialty Code:** O P H T
 - CCC:** 5 1 3 2 7
 - Date(s) of Service Provision:**
 - 1st Visit:** 0 1 / 0 6 / 2 0 2 0
 - 2nd Visit:** 0 1 / 0 6 / 2 0 2 0
 - 3rd Visit:** / / / /
 - 4th Visit:** / / / /
 - Duration of Spell (days):** 1
- CLIENT CLAIM SUMMARY:**
 - Type of Service:** G-DRG / Code
 - Tariff Amount:** 1 1 . 6 3
 - TOTAL:** 1 1 . 6 3
 - Name:** [Blank]
 - Signature:** [Blank]

4.5 Editing Claims




It is also possible to edit claims that have been saved previously, should there be the need to do so. To edit a claim;

1. Click on the  menu and select your preferred year and month.
2. At the claim list view, use the type of service tabs (OPD, IPD, DIAG, etc.) to narrow your search.
3. You may manually search for the claim or use the search feature to do so (See section 4.7).

4. Click on the claim of interest to open, the claims in edit mode (to effect the needed changes).
5. Click on  to save all changes that have been made.

4.6 Deleting Claims



To delete a claim, follow the following steps;


1. Click on the  menu and select your preferred year and month.
2. At the claim list view, use the type of service tabs (OPD, IPD, DIAG, etc.) to narrow your search.
3. You may manually search for the claim or use the search feature to do so.
4. Once you find the claim you want to delete, click on the  found at the right side of the row. This will pop-up a message asking you to confirm the delete. Click on  to delete the claim. **Please note that once a claim is deleted, it cannot be retrieved.**

An alternative approach is opening the claim in the edit mode and clicking on the “Delete” button at the bottom of the form.

4.7 Searching for claims

Claims can be searched for by either visually perusing a list of claims or using the advanced search option. The steps for doing the latter are specified below;

1. Click on the  menu and select your preferred year and month.
2. Click on the  icon, found at the right top section of the page. This will open a search form.
3. The user is allowed to search for a claim or claims using one or a combination of the parameters available on the search form. The parameters are;
 - a. Member no.
 - b. Member name
 - c. Claims Check Code (CCC)
 - d. Date range (Start date and end date)

- Once the needed parameters are entered, click on the  button to start the search.
- Search results are aggregated under a “**Search tab**” with an indication of the total number of claims found.

4.8 Preparing Claims for Submission (Exporting Claims)

Once all claims have been entered for a month, the next major step is to prepare the claims for submission to NHIS. Claims can only be exported for submission by a user with such privileges (**refer to section 3.2**). The application offers two (2) options for claims submission. The user has the option to;

- Uploading claims directly to the NHIS server via the internet, or
- Downloading an encrypted claims file and physically sending it to NHIS using a flash drive,

To prepare claims for submission, the following are the steps;

- Open the month of interest (*refer to section 4.1*) and click on the submit claims


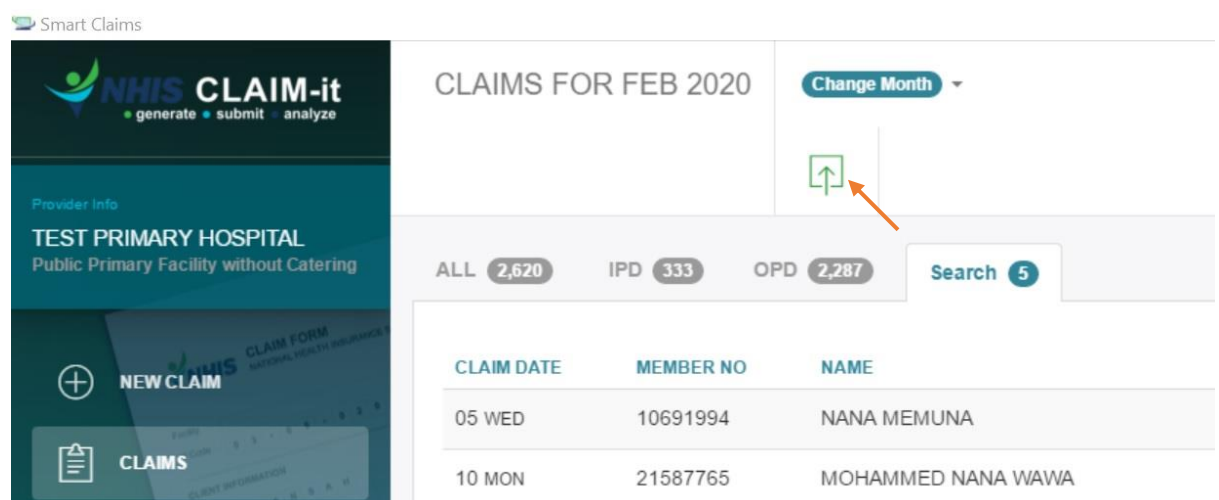
button =>  button found at the centre left section of the view (indicated by arrow in Figure 4-33). This should open a page that provides more detailed information on the action(s) to be performed (illustrated in Figure 4-34).

Figure 4-33: Claims list page showing the Export button



CLAIM DATE	MEMBER NO	NAME
05 WED	10691994	NANA MEMUNA
10 MON	21587765	MOHAMMED NANA WAWA

Figure 4-34: Claims Submission / Export page

SUBMIT BATCH FOR FEB 2020

Admin

Total Volume 2,620 claims

Total Cost 119,715.14 GHC

	VOLUME	COST
Outpatient	2,287	54,701.59
Inpatient	333	65,013.55


Service Cost	Medicine Cost
72.78%	27.22%
GHC 87,124.41	GHC 32,590.73

Disclaimer
You are about to export claims for **Feb 2020**.

* Claims generated from this system are still subject to adjudication by NHIA. Continue with Submission only if you agree

* Claims for Feb 2020 will be LOCKED. You can unlock later after the submission.

* It is recommended that you run the [Submission Advice Report](#) for Feb 2020 to review pending issues.



The submission/export page displays among others the total volume and cost of claims segregated by type of service and the percentage distribution for service and medicine cost. This is illustrated in Figure 4-34 above.

Additionally, the user also gets to see information on all recent claims submissions and uploads. It is also recommended that a **submission advice report** be generated before claims are submitted. To do this, refer to the **Reports section** of this document.

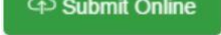
2. Click on Submit Online button  to start the online process of claims submission which will go through the following processes;
 - 2.0.1 The system will request for a confirmation from the user to start the online claims submission process, as illustrated in Figure 4-35 below.

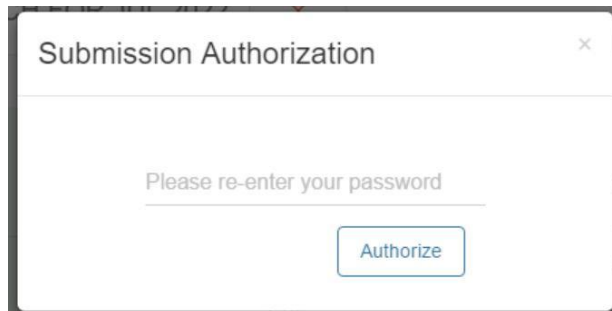
Figure 4-35: Confirmation for online submission

Confirm Online Upload

Are you sure you want to upload your claims to the NHIA Submission System?

Click on Yes Upload to confirm (**requires internet**)

- 2.0.2 The process will initiate once the user authorizes the submission by re-entering the password. Please note that only the **Insurance Officer** role has the user privilege of submitting claims online.

A dialog box titled "Submission Authorization" with a close button (X) in the top right corner. Inside the dialog, there is a text prompt "Please re-enter your password" followed by a single-line text input field. Below the input field is a blue button labeled "Authorize".

The status or progress of the ongoing submission will be displayed to the user as shown in Figure 4-36 and 4-37 below. The upload process may happen within a minute or more depending on the current queue.

Figure 4-36: Submission progress monitor

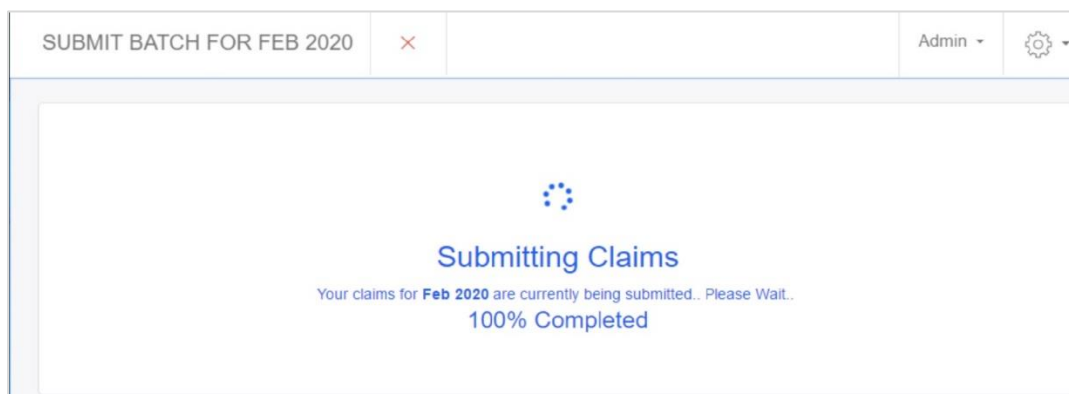
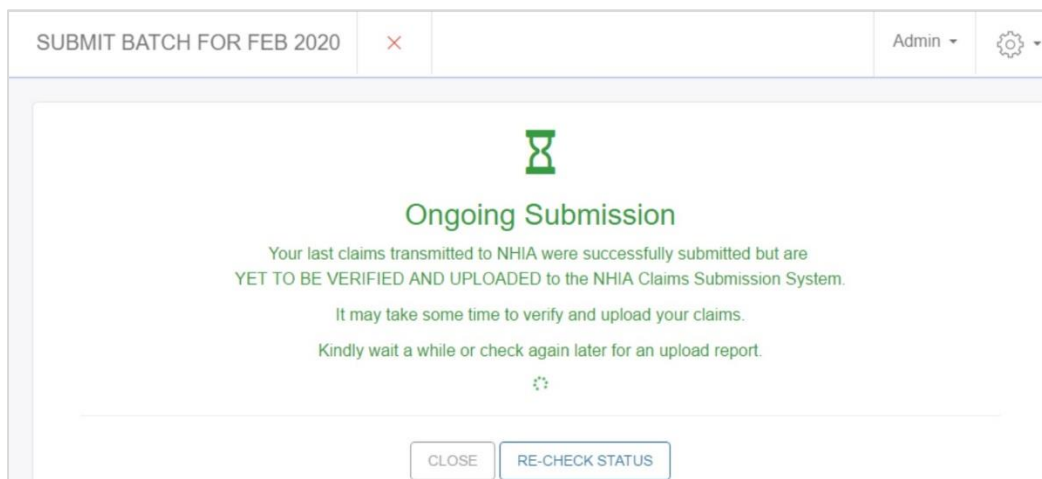
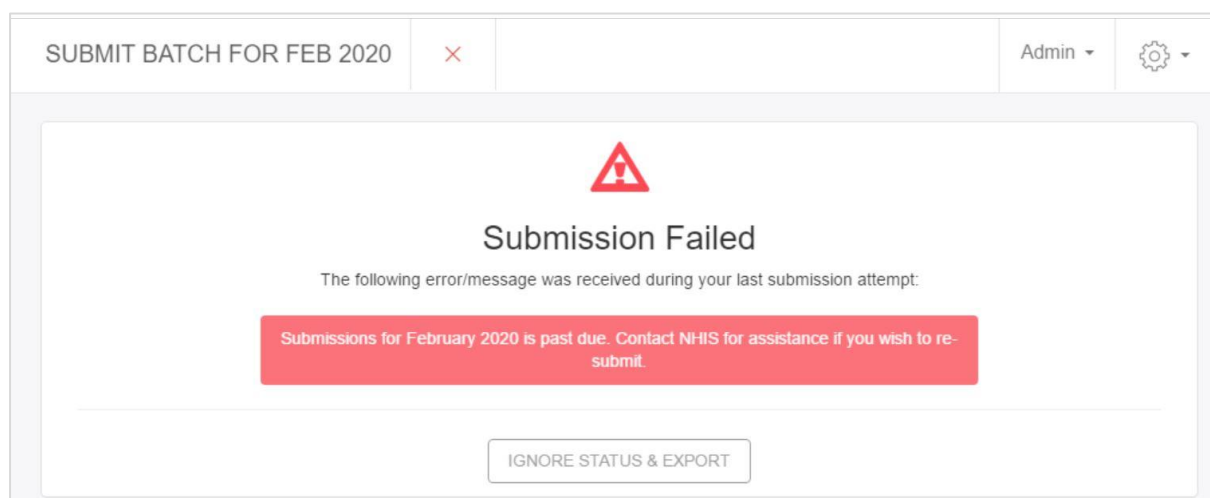
A web interface for monitoring claim submission progress. At the top, there is a header bar with "SUBMIT BATCH FOR FEB 2020" on the left, a red "X" icon in the center, and "Admin" with a dropdown arrow and a settings gear icon on the right. The main content area features a blue loading spinner icon, the text "Submitting Claims" in blue, and a message: "Your claims for Feb 2020 are currently being submitted.. Please Wait.. 100% Completed".

Figure 4-37: Submission status indicator


A web interface showing the status of a claim submission. The header bar is identical to Figure 4-36. The main content area features a green hourglass icon, the text "Ongoing Submission" in green, and a message: "Your last claims transmitted to NHIA were successfully submitted but are YET TO BE VERIFIED AND UPLOADED to the NHIA Claims Submission System. It may take some time to verify and upload your claims. Kindly wait a while or check again later for an upload report." Below the message is a green loading spinner icon. At the bottom, there are two buttons: "CLOSE" and "RE-CHECK STATUS".

- 2.0.3 The final step of the online submission process is for the user to wait for a feedback, to indicate if the submission was successful or otherwise. (as illustrated in Figure 4-37). A submission confirmation email is sent to the email address of the user or health facility once claims are successfully submitted. Should there be a failure in anyway, the user will be informed via the application as illustrated below.

Figure 4-37: Submission status indicator



To submit claims offline go through the following steps;


1. Click on the Submit Offline button  Submit Offline as shown in Figure 4-34.
2. This will generate an encrypted claims file which can be saved on a flash drive (popularly called, Pen drive).
3. Submit this file on the flash drive to the closest NHIA district office or Claims Processing Centre.
4. A confirmation receipt will be printed and given to the submitter while an email is equally sent the email address assigned to the providers account.

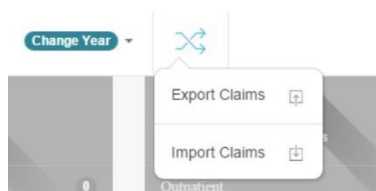
4.9 Exporting and Importing claims

This feature helps with easy movement of claims data from other computers to a “central computer” in order to aggregate claim entries within a facility prior to submission. This

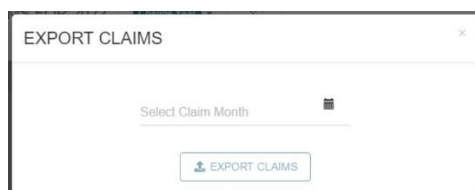
feature is recommended for scenarios where a health facility has no Local Area Network but with multiple computers and persons involved in data entry. Under such conditions the application is installed on all user computers but data aggregation at the end of entries are manually done on a single computer through the **claims export and import feature**. Hence all other users export their entries which are then imported into the application on the computer being used as the collation point. Claims management is therefore done at the point of aggregation.

To export claims, please do the following;

1. Click on the Export/Merge button  located at the top section of the general claims view area of the application. This will pop-up two options (export claims/import claims) as shown in the diagram below.



2. Select “Export Claims” and indicate the month of interest as illustrated below.



To import exported claims;


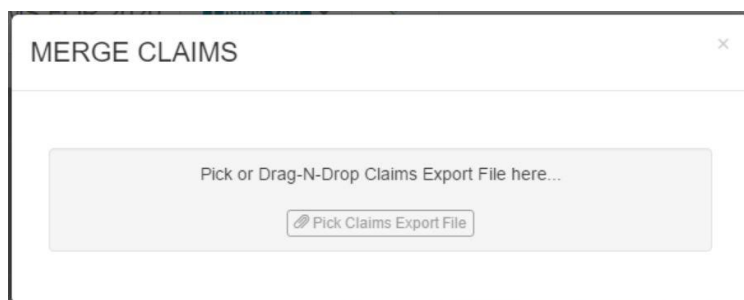
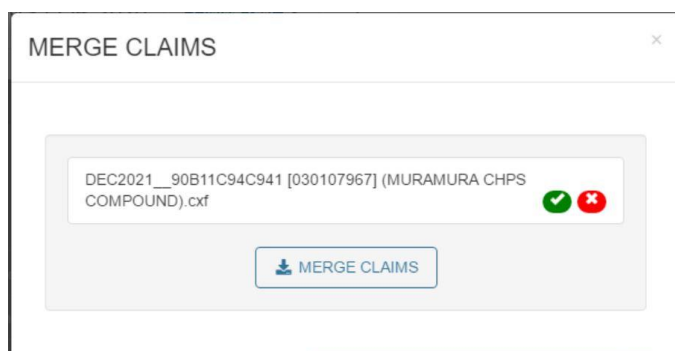
1. Click on the Merge Claims button  and select “Import Claims”.
2. A dialogue box will open, requesting the user to select a location of the exported file. Alternatively, the user can drag and drop the exported file into the area shown in Figure 4-38 below.

Figure 4-38: Submission status indicator



3. Click on the  button to finally start the import process.

Figure 4-39: Submission status indicator



Users are notified once claims importation is successfully completed.

5.0 UPDATING THE SYSTEM

5.1 General Information

This section describes the update feature of the application that enables users to keep the application up to date.

The claim-it application, from time to time will require a system update. The update feature of the application enable users to keep the application up to date.

5.2 System Update

There are two (2) major types of system updates.

1. **Policy and tariff updates:** This has to do with update on claims generation protocols, GDRGs and tariffs.
2. **Application updates:** This refers to update to the structure and (other component) feel of the application.

However, all these types of updates are installed in the same manner. *Once system updates are available, emails and/or text messages will be sent to all users of the application to notify them.*

5.3 Installing Updates

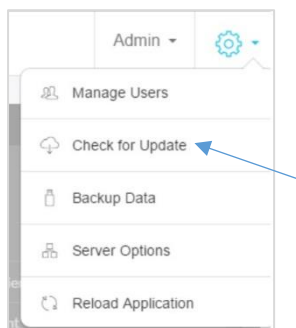
Updates can either be installed directly via the internet or downloaded and installed offline.

5.3.1 Direct Update

To update the application directly via the internet, do the following;

1. Click on the Settings  button and click on “**Check for Update**”.

Figure 5-01: Settings menu indicating check update button



2. The application then checks for any recent updates and informs the user through a prompt.

3. Click on **“Install Update”** to start the installation i.e. if any updates are found.

The application periodically **checks for updates automatically** once it detects an internet connection. However, the user is always informed of any available updates prior to installation. Anytime new updates are available, user will be prompted by a red button indicating **“Update Available”** on the left side of the home screen of the application. By clicking on this button, the download process is initialized.

5.3.2 Offline Update

This option requires the user to download and manually install the update file. To do this;

1. Open a web browser and enter **claimit.nhia.gov.gh**. Go to the **Updates** section of the webpage to download the required update. Your update file will then be saved to the default download directory of your browser.
2. Double-click on the update file to install. You will be notified once the installation is complete.

Update files can also be accessed at any NHIS district office or CPC.

Details of updates that have been run on the system with regards to Base Data, Service tariffs, Medicine prices, Validation rules and Credentialing information can be found at the Setup Detail section of the application. To open this section, click on the Provider Info area at the left section of the application after login, as shown in Figure 5-1 below;

Figure 5-1: Home screen showing the Provider info section

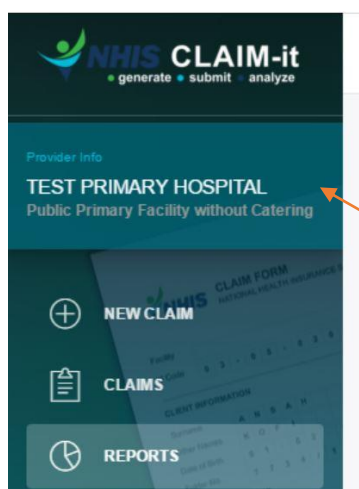


Figure 5-2: Provider info view showing updated details

Setup Details

✕

Provider Information

Provider Name

TEST PRIMARY HOSPITAL

Provider ID

03-08-06769

Facility Type

Public Primary Facility without Catering

Prescribing Level

C1

Installed Credentials

Unique Code	Facility Type	Effective Date
03-08-725-01-06769-03-C1-2-010118	Public Primary Facility without Catering	01 Jan 2018

Update Credentialing

Installed Components

Component	Version
Base Data	Mar 2016
Service Tariffs	Mar 2016 , Apr 2019
Medicine Prices	Mar 2016 , Jul 2018 , Jul 2019 , Apr 2020 , Mar 2021
Validation Rules	Mar 2016
Client Application	Head

Check for Updates

6.0 REPORTING

6.1 General Information

This section describes the various reports and visualizations in the application.

6.2 Types of Report

The application comes with **seven (7)** report types. The reports are categorized under seven (7) themes, i.e. Dashboard, Overview, Attendance, Medicines, Services, Submission Advice and Excel Summary.

1. Dashboard:
 - a. Summary attendance.
 - b. Claims submission volume and cost.
 - c. Top 10 Diagnosis.
 - d. Top 10 Prescribed Medicines.
2. Overview:
 - a. Claims volume and cost by type of service for the current month.
 - b. Claims volume and cost, month on month for the current year.
3. Attendance:
 - a. Attendance by gender and age grouped by specialty. For both OPD and IPD cases.
4. Medicines:
 - a. Top ten (10) most prescribed medicines.
 - b. Top ten (10) most utilized medicines by cost.
 - c. Most utilized therapeutic classes by volume
5. Services:
 - a. Top ten (10) most utilized GDRGs by volume.
 - b. Top ten (10) most utilized GDRGs by cost.
 - c. Top five (5) Major Diagnosis Categories (MDCs) by volume.
6. Submission Advice:
 - a. List of claims that require further attention, categorized into;
 - i. Potential duplicates
 - ii. Multiple ANC claims
 - iii. Attachment required claims
7. Excel Summary:

- a. Excel Workbook containing sheets on various volume and cost summaries on claims

6.3 Accessing reports




To access the desired report(s), the user simply clicks on the  **REPORTS** menu and selects the desired report by clicking on the select  button. All reports are defaulted to report on the current year. However, the period of reporting can be changed by clicking on the filter  button to specify the range of choice. Figures 6.1 to 6.4 illustrates some of the reports generated by the application.

Figure 6-1: Dashboard

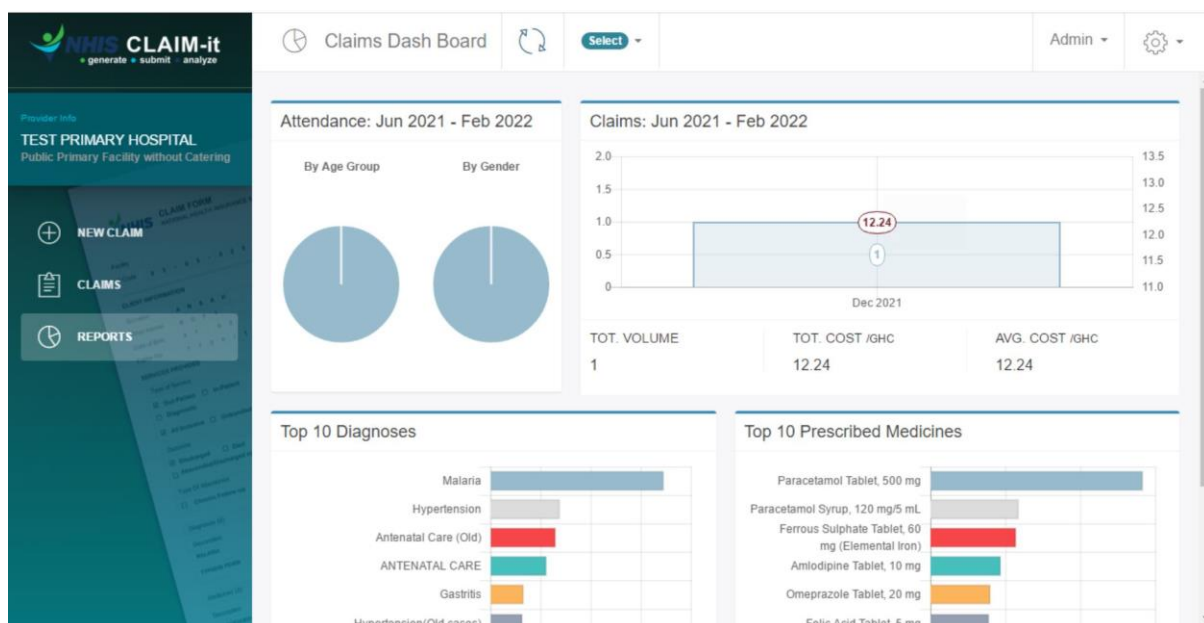


Figure 6-2: Overview of claims report

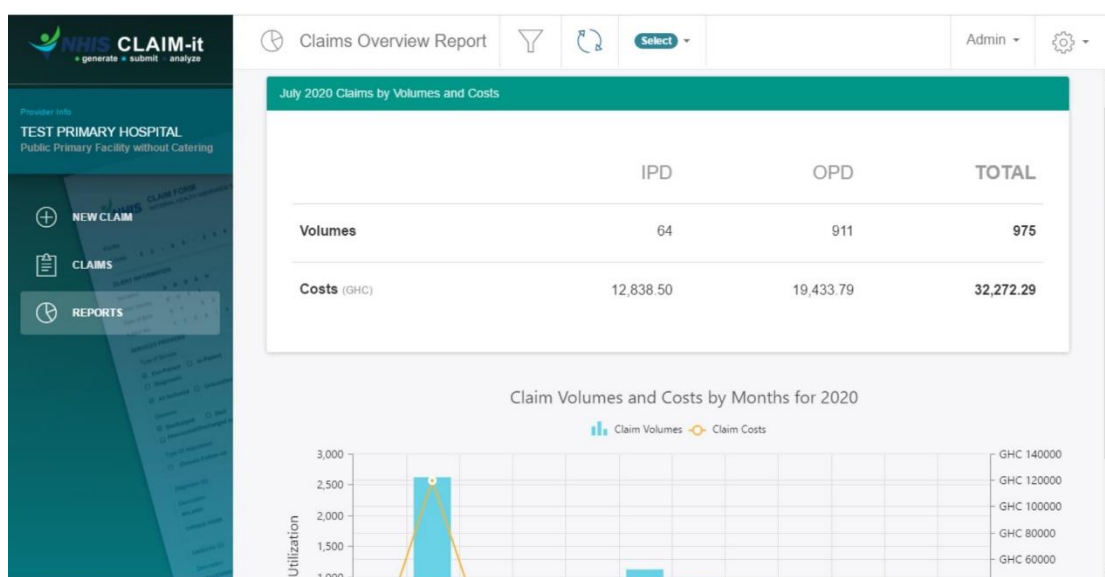


Figure 6-3: Attendance report

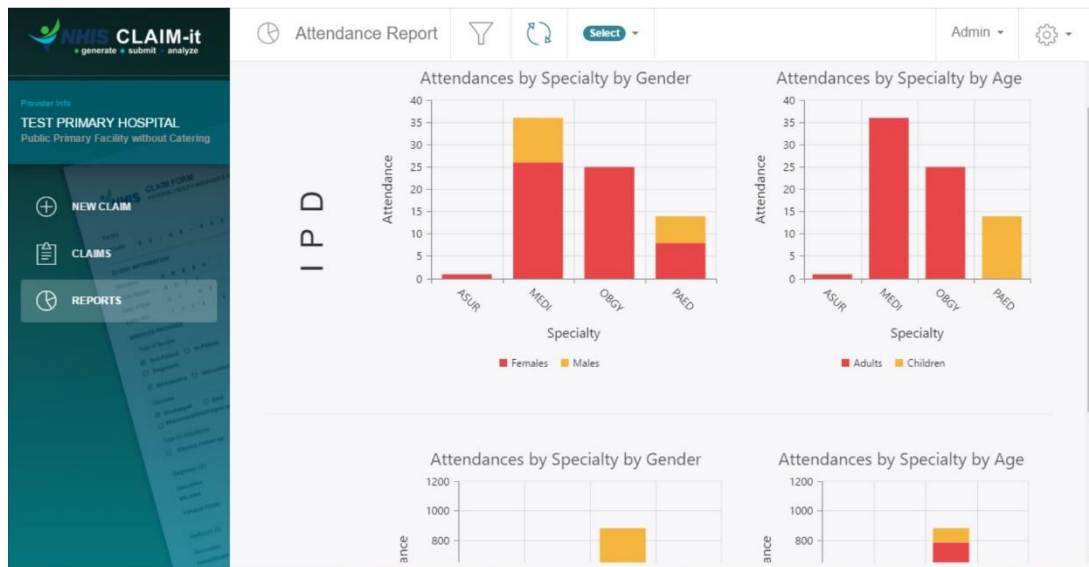
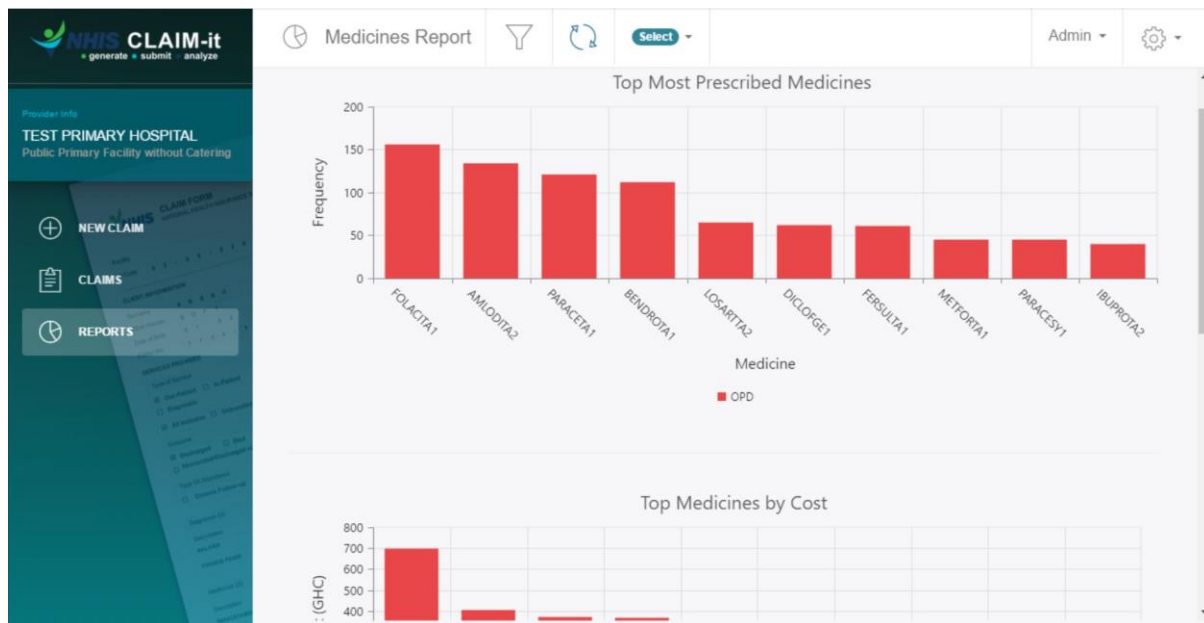


Figure 6-4: Report on service utilization



Figure 6-5: Report on medicine utilization



6.4 Submission Advice Report

This report forms part of the reports available at the reports section of the application. The submission advice report gives the health facility's insurance officer a report on claims that may require some extra attention prior to submission. For instance, based on the types of medicines dispensed, the lab results that prompted the prescription of such medicines are required by NHIA during vetting to serve as proof. Hence, such a document will have to be scanned and attached to the affected claims in all such instances. Therefore, it is advised that a submission advice report be generated prior to claims submission.

To generate a submission advice report do the following;

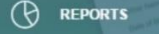



- Click on the Reports  menu
- Click on  and select the Submission Advice.
- Click on  and select the month of interest
- Click on  to show the reports. Depending on the issues detected the number of reports can span from one to several. This is illustrated in Figure 6-5.

Figure 6-5: Report on medicine utilization

Submission Advice Report

▼ Filter

↺

Filters: Claim Month: Apr 2017

Diagnostic Claim Attachment Required

1 Diagnostic Claim(s) require attachment of their Diagnostic Request Forms.

[Download](#)

Supporting Documents Required

17 Claim(s) require attachment of their supporting documentation.

[Download](#)

- e. Click on the “**download**” button below each report and save it at a desired location.

7.0 DATA BACKUP

7.1 General Information

The data backup features of the application elaborates further on how it could be utilized to prepare users to recover from unknown system failures.

7.2 Backup Feature

The application is equipped with an automatic backup feature, allowing a copy of generated claims data to be created based on the preferred period of the user.

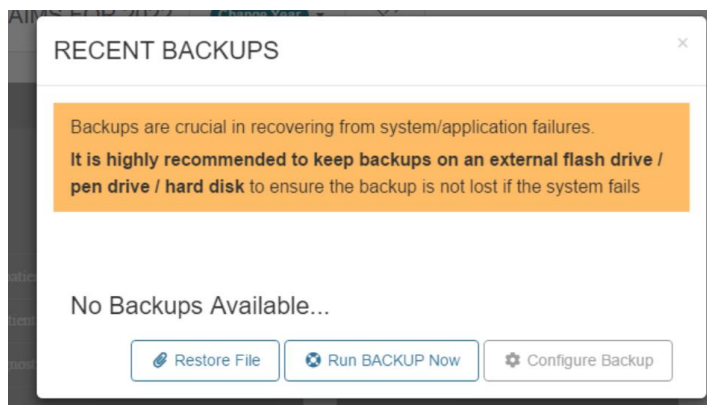
Automatic backups can be configured to create daily, weekly or monthly backup.

However, by default automatic backups are scheduled to run every day. Backups are created for each month, **over a three (3) months period**. Users are therefore **advised to download and save such data** on an external storage device.

Once a backup is created, a notification icon will appear on the settings icon to indicate the availability of a backup for download.

However, to generate or restore a backup, please go through the following steps;

1. Click on the settings icon and select Backup/Restore Data



2. Click on “Configure Backup” if there is a need to change the default Backup settings. Else,
3. Click on “Run BACKUP Now” to create a recent backup of your claims as illustrated by the diagram below.

RECENT BACKUPS

Backups are crucial in recovering from system/application failures.

It is highly recommended to keep backups on an external flash drive / pen drive / hard disk to ensure the backup is not lost if the system fails

Kindly click on the backups below and choose to save them on an external flash drive / pen drive / hard disk

CLAIM MONTH	BACKUP TIME		
JUL 2022	03 JUL 2022 09:36:10	RESTORE	DOWNLOAD
JUN 2022	03 JUL 2022 09:36:10	RESTORE	DOWNLOAD
MAY 2022	03 JUL 2022 09:36:10	RESTORE	DOWNLOAD

[Restore File](#)[Run BACKUP Now](#)[Configure Backup](#)

By clicking on this button, the user is presented with a list of available backups and the options to either download and/or Restore any of the applicable backups.

8.0 TROUBLESHOOTING

8.1 General Information

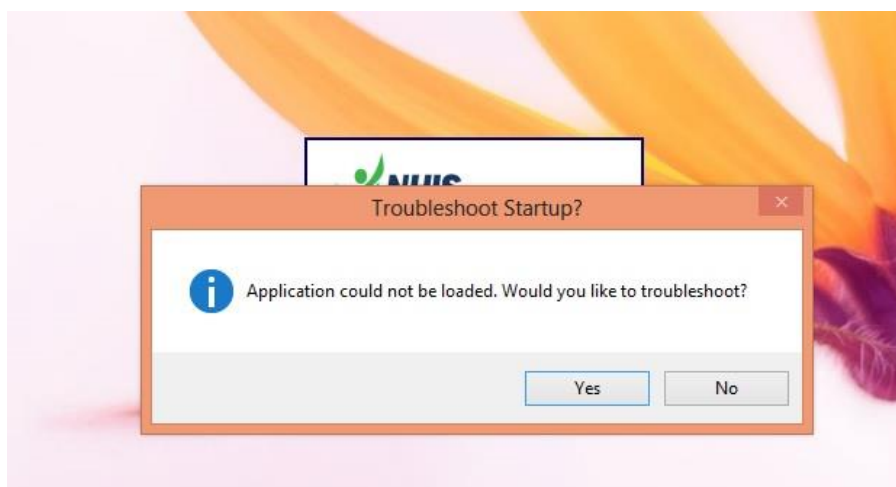
This section explains the processes that users should go through in order to solve some basic technical glitches which may cause the application not to start.

8.2 Troubleshooter Utilization

Anytime the application is started, it checks to see if everything is fine for its efficient operation. If it encounters any error, application loading is truncated and the user prompted with the option to run the trouble-shooter utility.

This is illustrated in Figure 8-1.

Figure 8-1: Automatic trouble-shooter prompt



By clicking on “**Yes**”, this utility will diagnose the problem and automatically try to fix all identified issues. Illustrated in Figure 8-2.

Figure 8-2: Troubleshooter Utility



The results of the troubleshooting will be displayed to the user. If there is any reason to re-run trouble-shooting, click on “**RUN**”.

In very extreme circumstances where the troubleshooter is not successful at fixing the identified issues, NHIA may require the user to click on “**Download Troubleshoot File**” to download and email that file to NHIA for further inspection to determine what might be wrong.

The user, by clicking on “**Backup Data**”, can also backup all data in the database and save to a flash drive. This helps to keep essential data safe, preventing data loss in worse case scenarios.

9.0 SOFTWARE UNINSTALLATION

9.1 General Information

This section shows the user how to safely remove the application and all its components from the user's computer.

9.2 Uninstalling CLAIM-it

The uninstallation of CLAIM-it is no different from the processes entailed in uninstalling any software from a Windows Operating System. To uninstall follow the following steps;

- a. Open “**Control Panel**” and click on “**Programs and Features**”
- b. Identify and click on “**CLAIM-it vHead**”
- c. Click on uninstall to start the uninstallation process
- d. The user will be prompted to either uninstall or keep the database. The latter will complete the installation but keep the database intact. The option is mostly ideal when the intention is to use the same database for a future installation.

Note: *The folder containing backups are automatically placed on the Desktop of the user during the uninstallation process. This is to ensure that inadvertent uninstallations don't result in the permanent loss of data.*