Acentra HEALTH | Accelerating Better Outcomes

ATREZZO USER GUIDE

Assessment Module

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Introduction

The Atrezzo system is a person-centered, web-based solution that transforms traditional, episodic-based care management into proactive and collaborative population healthcare management.

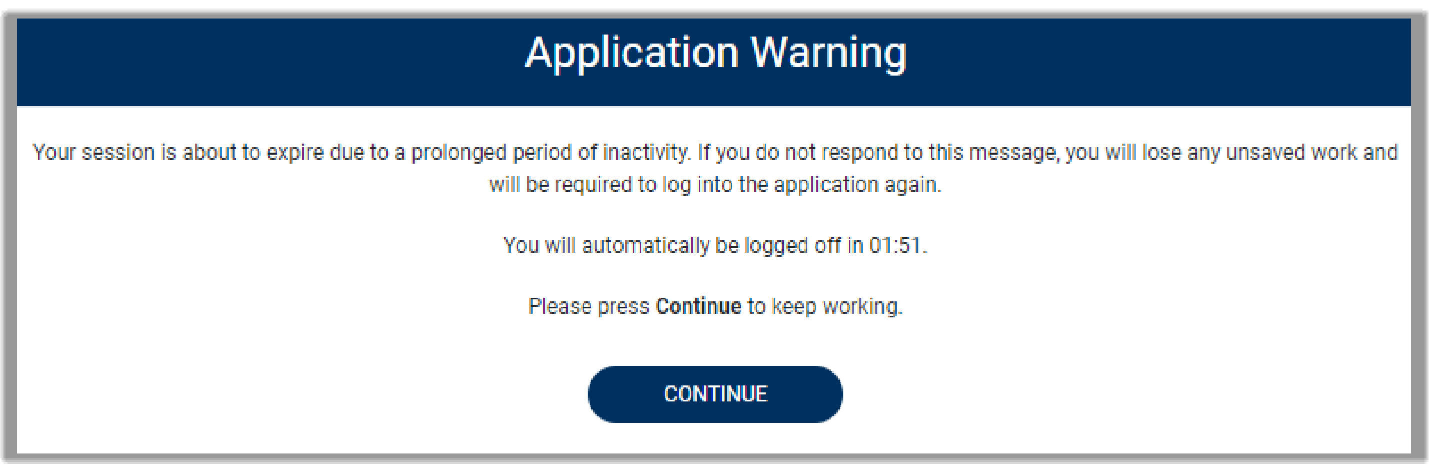
The purpose of this user guide is to provide an overview of the Assessment Module functionality within Atrezzo. This manual will identify the steps and highlight the processes to complete Assessments and/or Questionnaires and provide troubleshooting tips and tricks. Access, views, and options will vary based on contractual requirements and assigned user roles. It is meant to be utilized as a resource in addition to system training. This user guide was designed to be easy-to-use for users familiar with a basic PC and internet environment.

Security

The Atrezzo portal is designed to support specific roles. Prior to accessing the system, you will be assigned a specific user role with pre-defined system permission. Access, functionality, and system activities will be based on the assigned user role.

The system will automatically termiante an active session after 30-minute of consecutive inactivity. A pop-up will apear with a 2-minute countdown to logging out. If you are actively working within the system, you will not receive this pop-up warning.

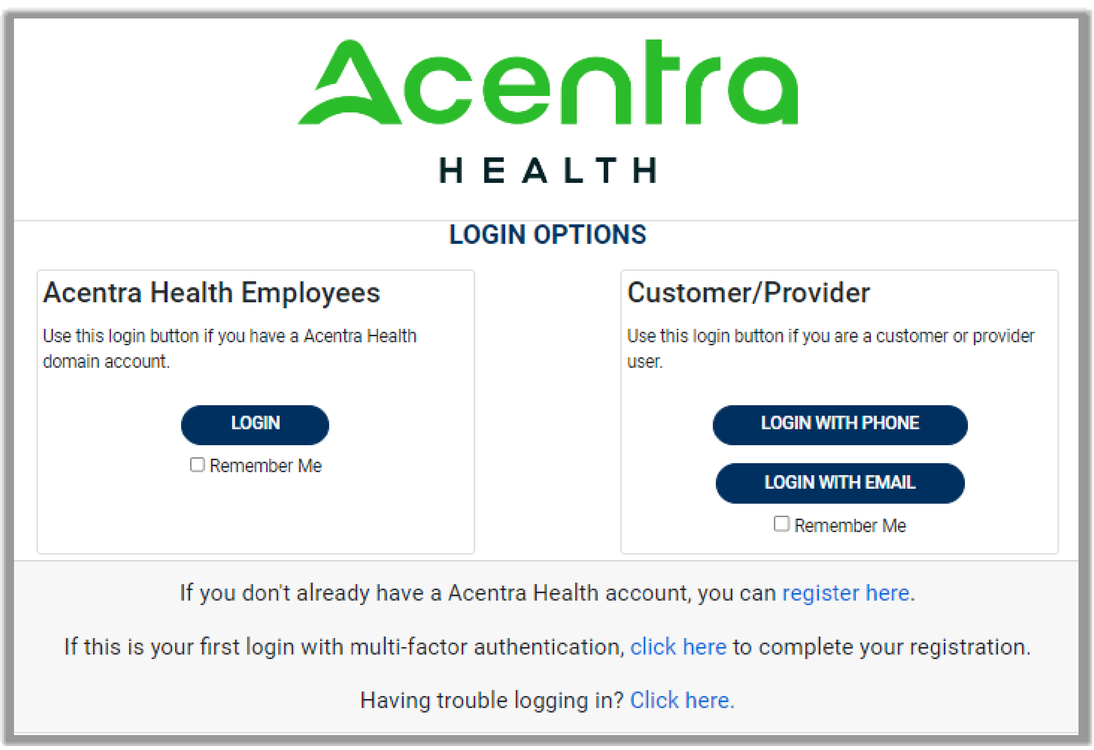
To continue working, click **Continue**. If you do not select continue before the countdown reaches 0, you will be required to login again to continue utilizing the system. The system AutoSaves as you navigate and complete fields. Completed work will not be lost; however, any unsaved work will be lost if the system times out due to inactivity.



Getting Started

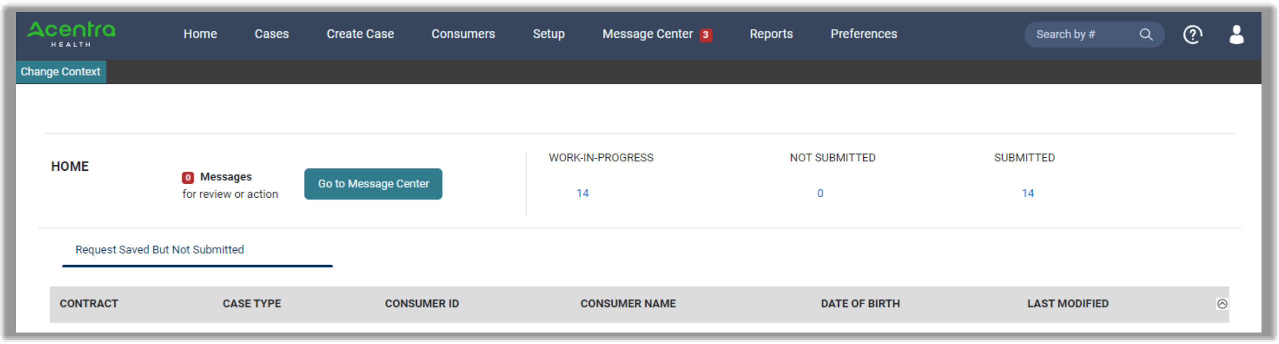
You will receive access to the system by a Provider Administrator. You will receive a system generated email containing a link to complete Account Registration. The link will expire after 2 days if account registration is not complete.

You will be required to complete Multi-Factor Authentication (MFA) during registration. This is a one time process. Future login will be under the Customer/Provider side of the login screen.



System Navigation

Upon successful login, you will be taken to the Atrezzo Provider Portal Home Page. The navigation bar will remain in place regardless of location and user role, which allows for quick and easy navigation from any screen.

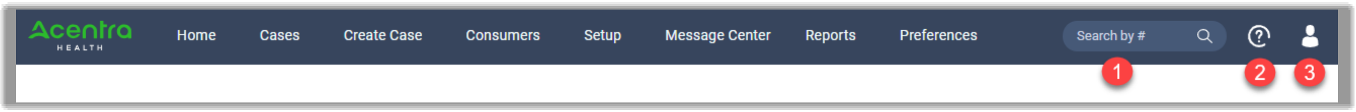


The legend below gives a brief overview of each area within Atrezzo. For a more detailed description, and for all available workflows, click the hyperlink.

Home	This is the default page upon successful login and will enable you to view submitted cases and any pending submissions.
Cases	This section will enable you to search cases based on specific parameters. To ensure efficient search results, try selecting specific information in each drop down to narrow search results.
Create Case	This section will enable you to create a new request using the Create Case Wizard.
Consumers	This section will enable you to search for Consumer, Member, or Beneficiary specific information utilizing the Consumer ID or last name and date of birth. Consumer specific data will be rendered based on information entered.
Setup	**Visible to Provider Administrator users only** This section will enable Provider Administrators to manage, edit, and add provider users for the facility and add additional provider groups.
Message Center	This section will enable you to view messages from the clinical review team regarding specific consumers and/or cases.
Reports	This section will display all available reports for those who have access. User specific reports will be listed on this page, no search required.
Preferences	**Visible to Provider Administrator users only** This section will enable you to set preferred diagnosis, procedure codes or preferred servicing providers. This will allow for quicker request submission.

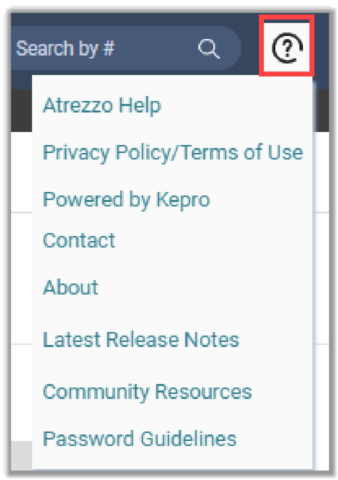
General System Features

This section highlights the features found on all screens throughout the system and provides information on how to utilize these features for optimal navigation.

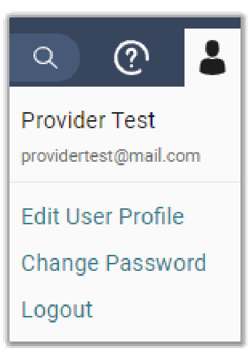


1. The **Search by #** field allows you to quickly search for a Case ID or Authorization Number. Enter the Case ID or authorization number, then hit enter on your keyboard or click outside the search field to be taken to the specified case. (See Searching by Case ID for step-by-step instructions).

2. The **Help** menu will provide access to Atrezzo Help (user guides, FAQ), Community Resources, and Password Guidelines.

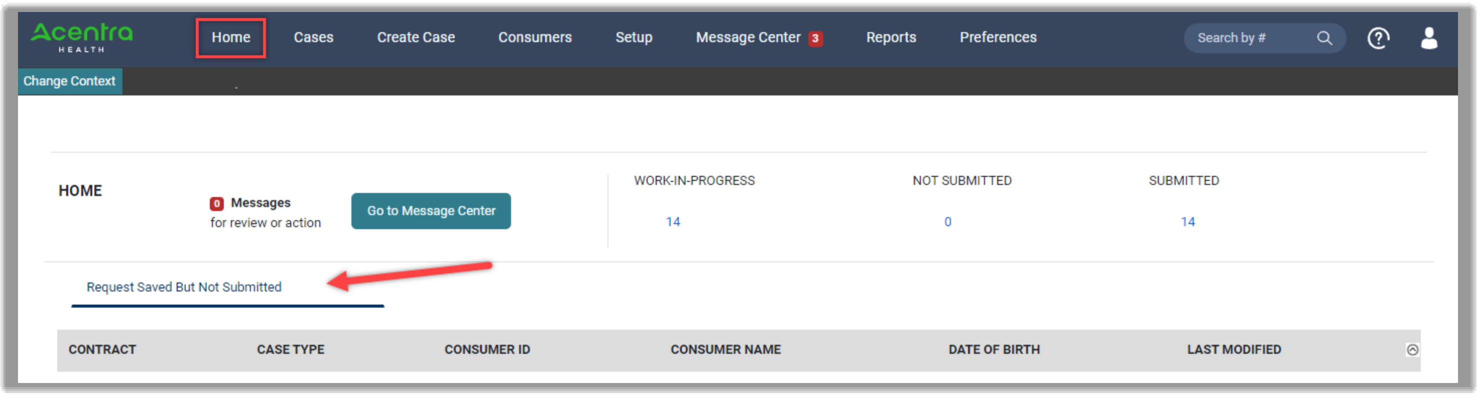


3. The **Profile** section will identify the user logged in. Click on the person icon in the upper right corner to open menu options where you can Edit User Profile, Change Password, or Logout.

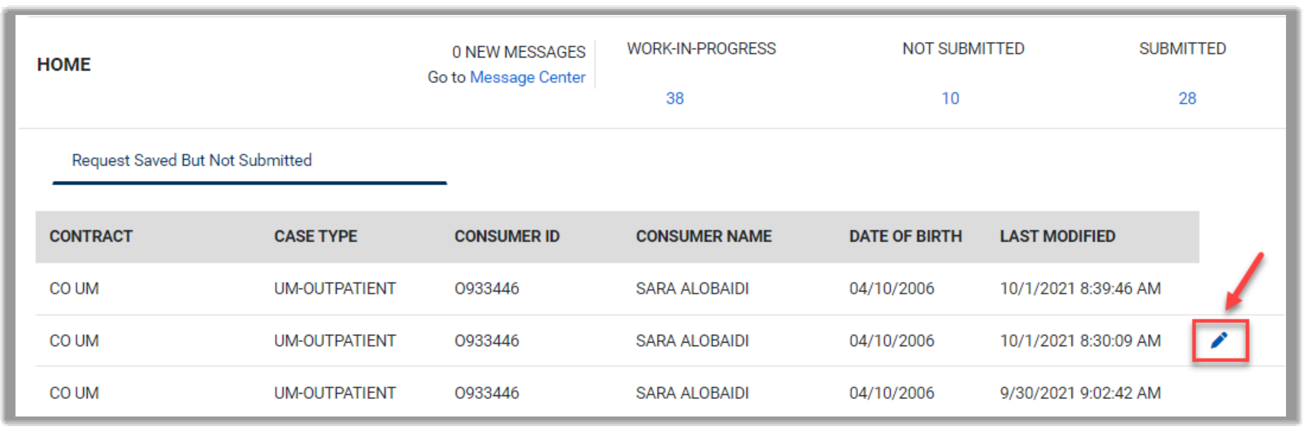


Home Screen View

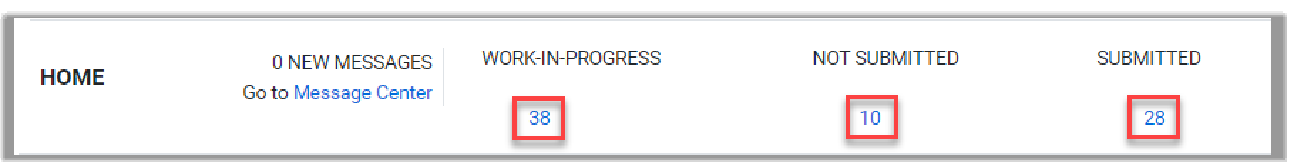
Once successfully logged in, you will be taken to the Atrezzo Home Screen which defaults to display available **Request Saved but Not Submitted**. This will provide a list of Consumers with cases that have been started but are incomplete and have not been submitted for clinical review.



To complete the saved case, you can click the edit icon that will appear when hovering over the specified Consumer line.

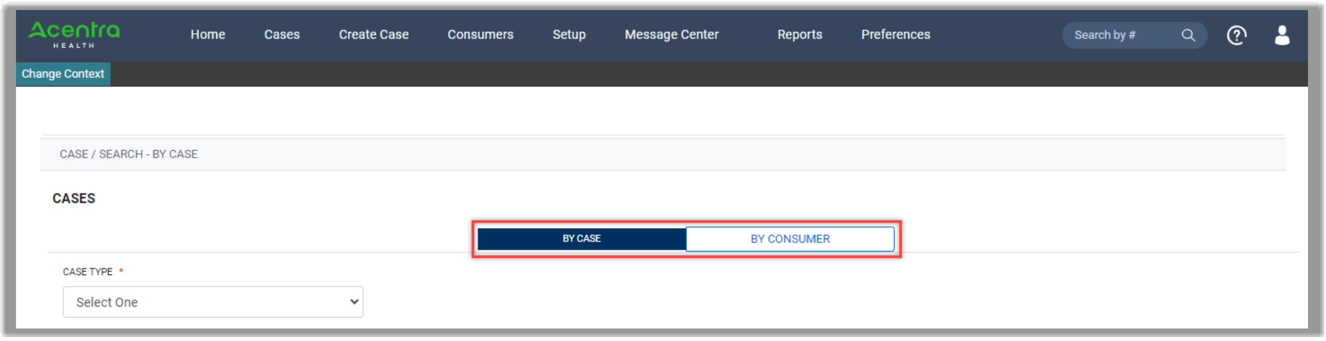


The numbers below Work-In-Process, Not Submitted, and Submitted are a total of your organization's cases in that status. Clicking the hyperlinked numbers will bring you to the case search page.



Cases

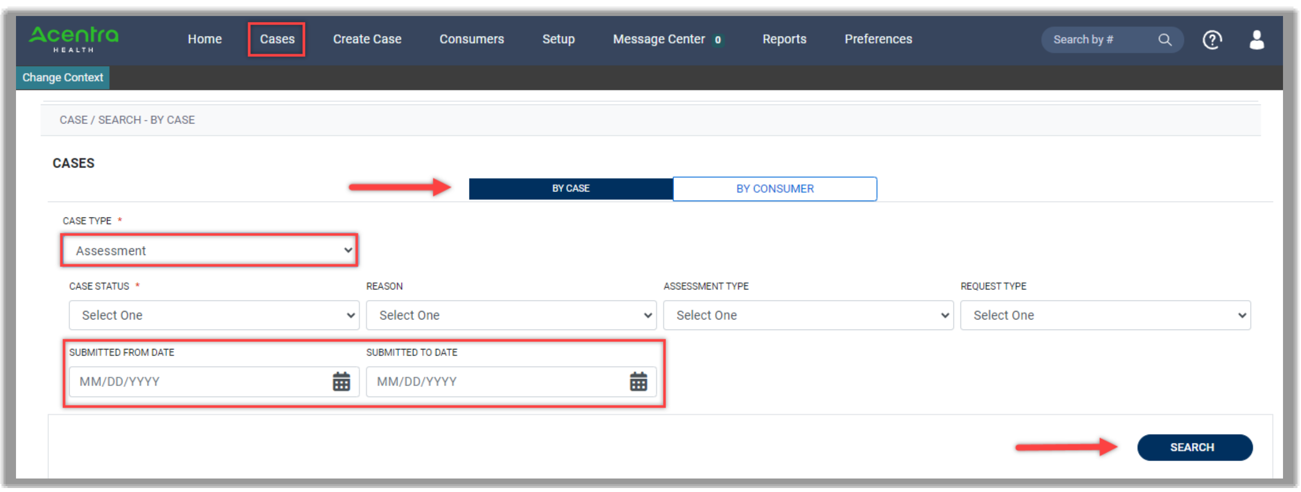
This section is searchable by Case or Consumer. Select the desired search option at the top.



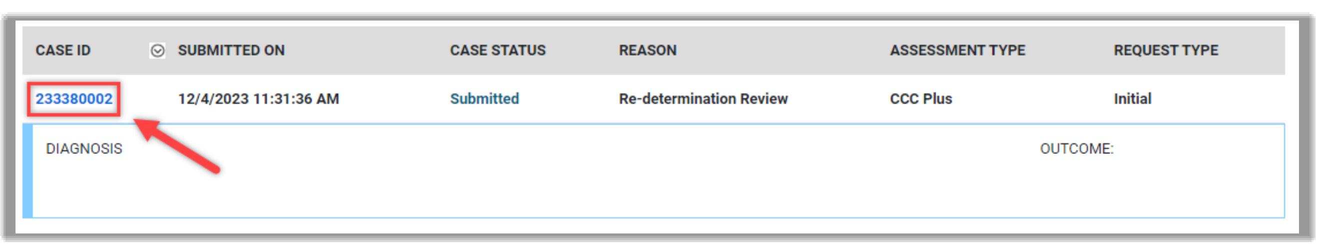
Searching By Case

To search By Case, select **Case Type** UM from the drop down. Once the Case Type is specified, additional search parameters will appear. To identify specific cases and ensure efficient search results, try selecting specific information in each drop down to narrow search results.

Note: *You must enter a submitted or 30-day service date span for search results to render.*

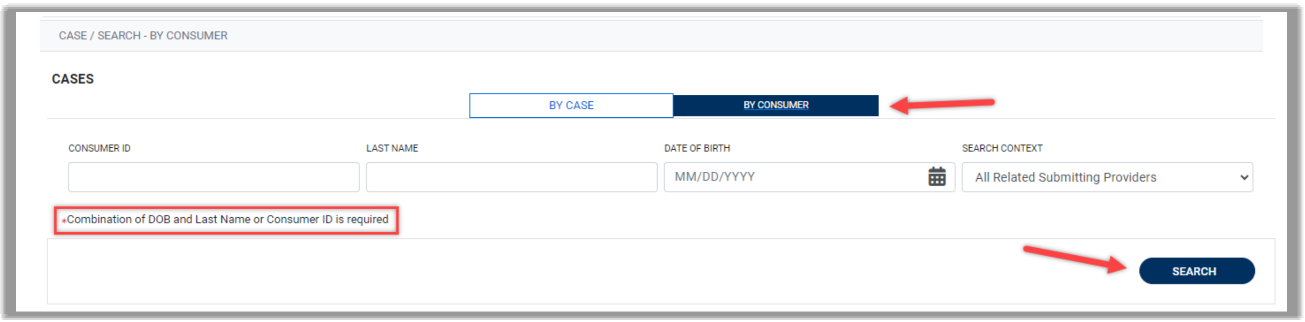


Search results will populate below.

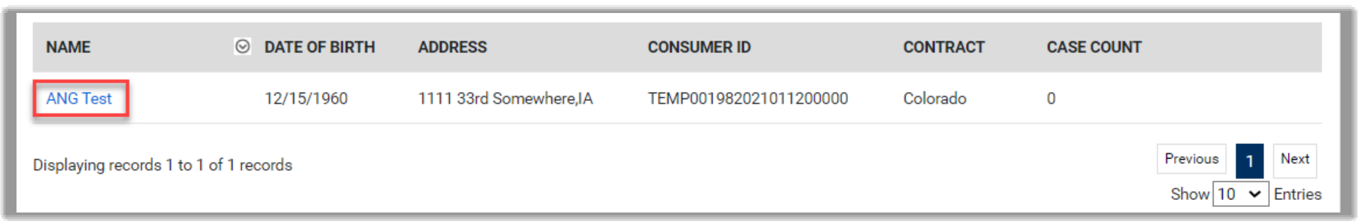


Searching by Consumer

To search By Consumer, you must enter Last Name and DOB or Member ID and click **Search**.
Note: Some contracts will require additional information.



Search results will render below.



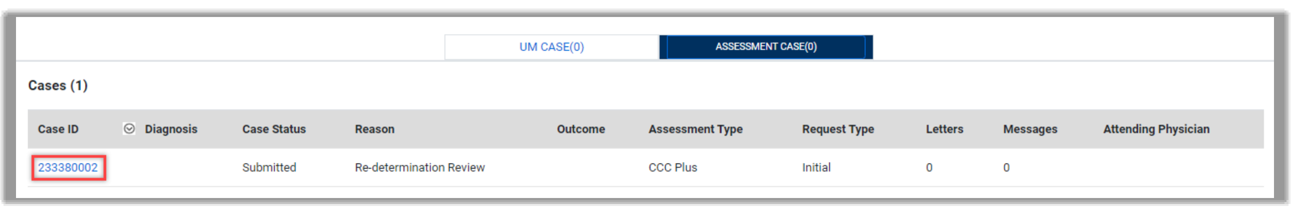
NAME	DATE OF BIRTH	ADDRESS	CONSUMER ID	CONTRACT	CASE COUNT
ANG Test	12/15/1960	1111 33rd Somewhere,IA	TEMP001982021011200000	Colorado	0

Displaying records 1 to 1 of 1 records

Previous 1 Next

Show 10 Entries

The Consumer Name is a hyperlink which will populate all Submitted and Servicing Request for that consumer. Clicking the Case ID hyperlink will bring you into the case where you will have limited functionality.

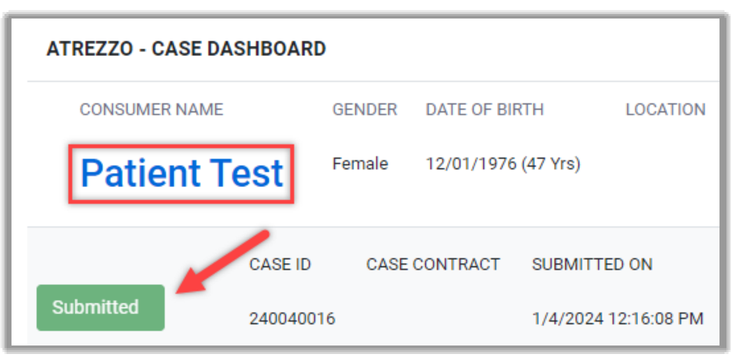


UM CASE(0) ASSESSMENT CASE(0)

Cases (1)

Case ID	Diagnosis	Case Status	Reason	Outcome	Assessment Type	Request Type	Letters	Messages	Attending Physician
233380002		Submitted	Re-determination Review		CCC Plus	Initial	0	0	

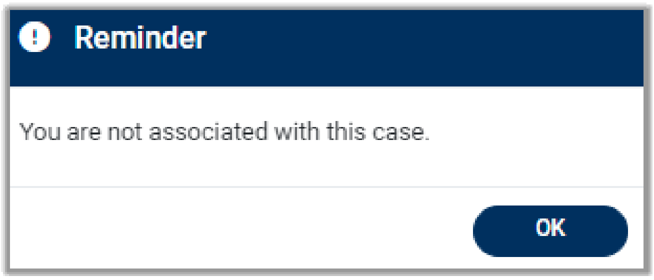
The Consumer Name is a hyperlink that will bring you to the consumer's information page and the status of the case will be visible in the top left corner of the page.



Search by Case ID

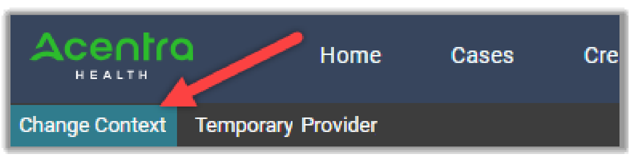
To search directly for a case, enter the Case ID in the search by # box on the top right of any page, then hit enter on your keyboard or click anywhere outside of the search box.

If a message is received indicating you are not associated with the case, be sure you are logged in under the appropriate provider.

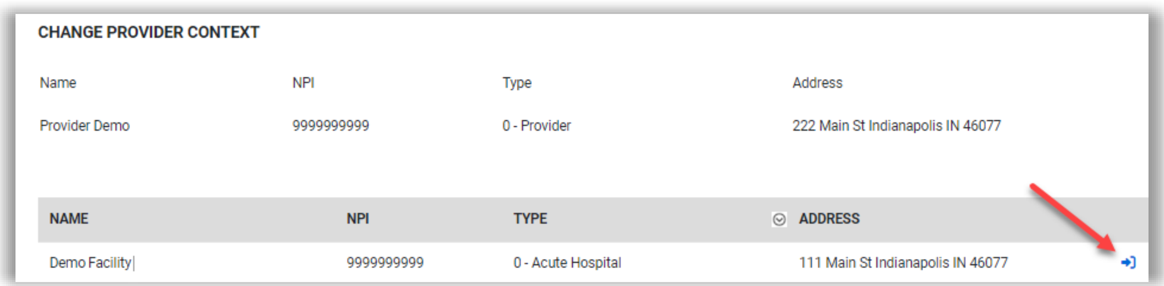


Change Context

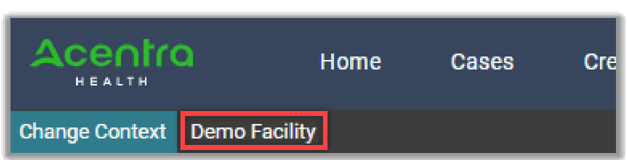
To update which provider/location you are logged in under, click **Change Context** in the upper left corner.



To select a different provider, click the arrow icon to the far right of the preferred selection.



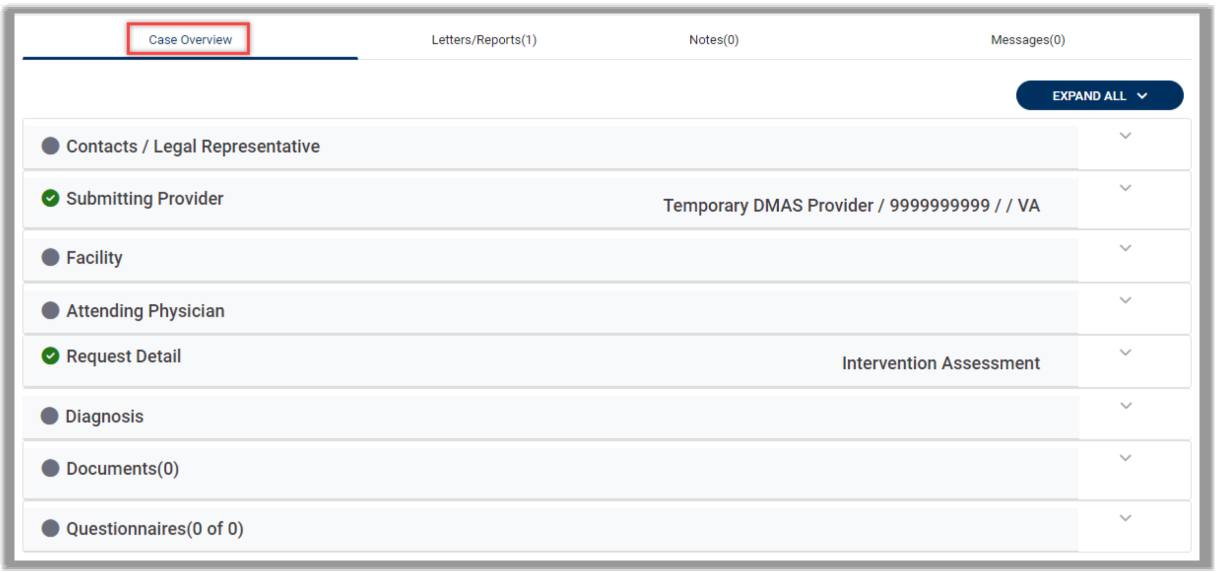
The selected provider will be displayed in the banner at the top left of the screen.



Case Overview

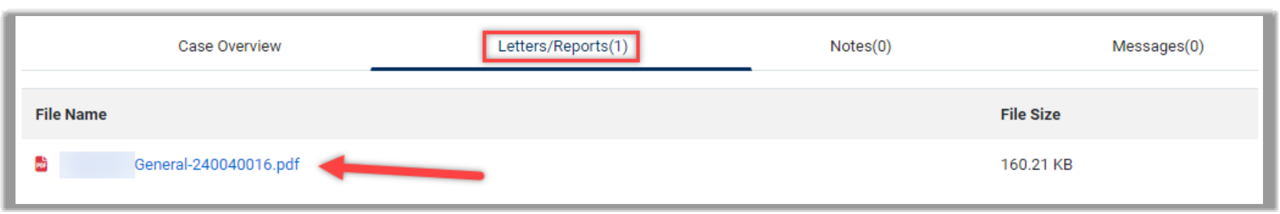
The Case Overview will provide the current case including the Submitting Provider, Facility (if applicable), Attending Physician, Request Detail, and Diagnosis. In most cases, only the Submitting Provider and Request Detail will be completed.

Note: *Completed information is indicated with a green check and will also be displayed on the info bar on the right side.*



Letters/Reports

Letters/Reports will display any applicable letters or reports that have been uploaded specific to this case. Clicking on the hyperlink to view the letter/report will open item outside the internet browser.

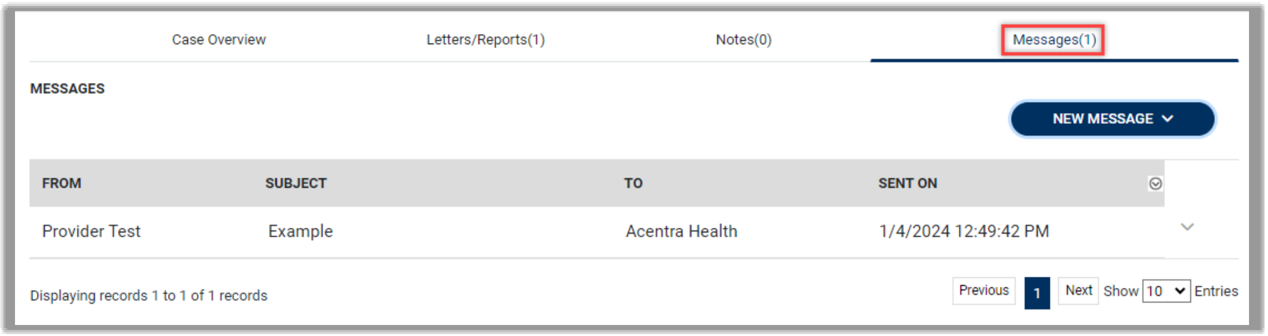


Adding Notes

This section will display any notes pertaining to the specified case. This will include notes from Acentra Health or entered by the Provider. To enter a note, click **Notes**, type your message within the text field, and click **Add Note**.

Messages

In Messages you will see any messages to or from Acentra Health or the Provider.



To enter a new message, click **New Message** in the upper right corner. Message fields will populate. Complete the required fields, then select **Send**.

Submitting a New Request

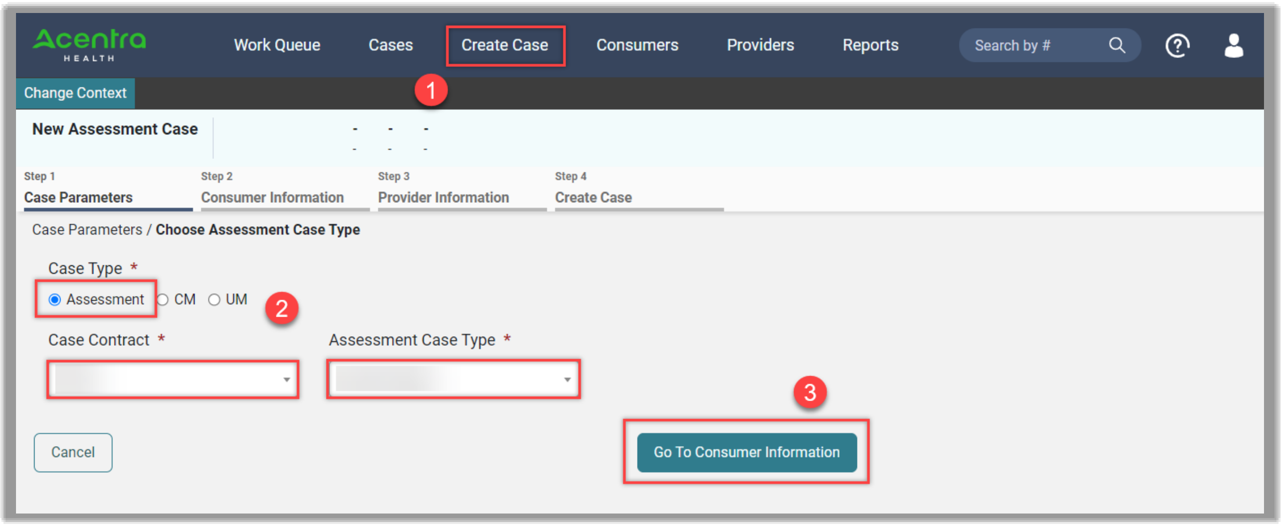
The Create Case Wizard will walk you through the steps to create a new inpatient or outpatient request. In the navigation pane:

1) Click **Create Case**

2) Select **Case Type:** Assessment; then select **Case Contract** and **Assessment Case Type** in the Case Parameters section.

Once all required fields are complete, click 3) **Go to Consumer Information**.

Note: Some fields will prepopulate based on user role permissions and contract access.

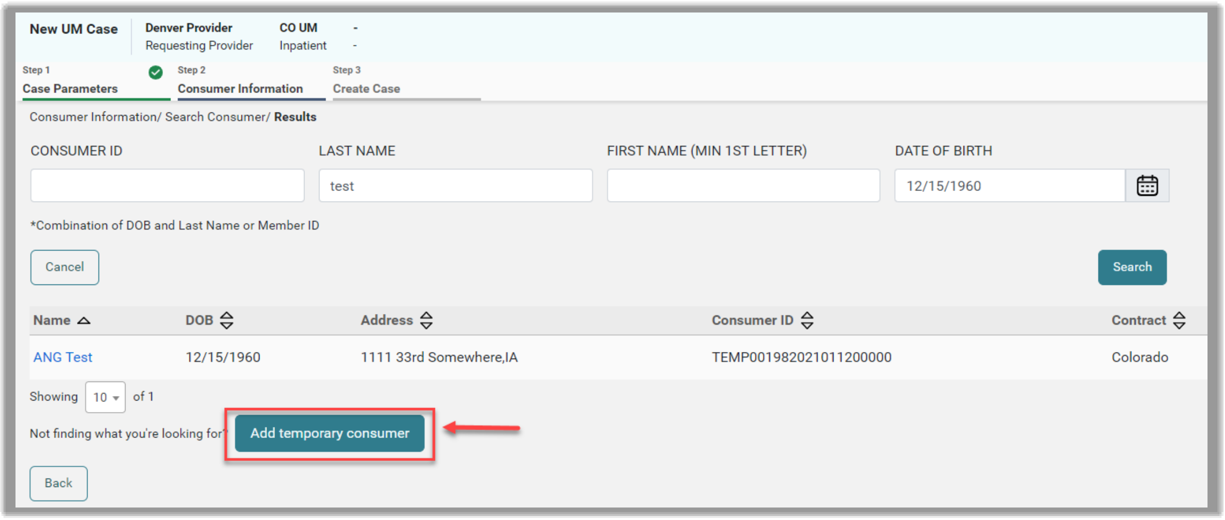


Enter at least one field for **Search Consumer** and click **Search**. Click the **Choose** button associated with the appropriate consumer and their information will populate.

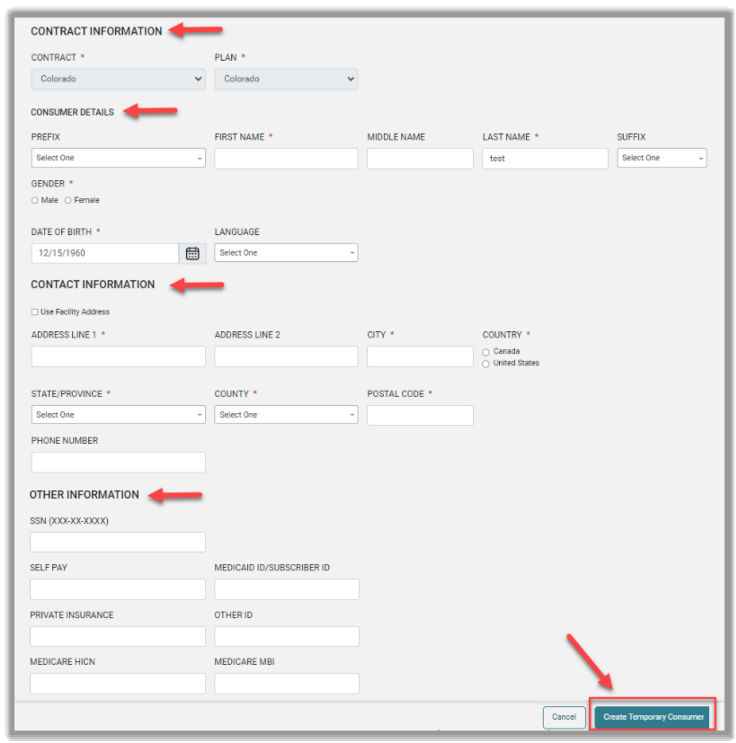
Adding a Temporary Consumer

If you cannot find the correct consumer after a thorough search, you can click **Add Temporary Consumer**. (Please make sure the search is exhaustive before using this option.) This creates a temporary consumer profile that will be merged with the permanent profile with a subsequent data load.

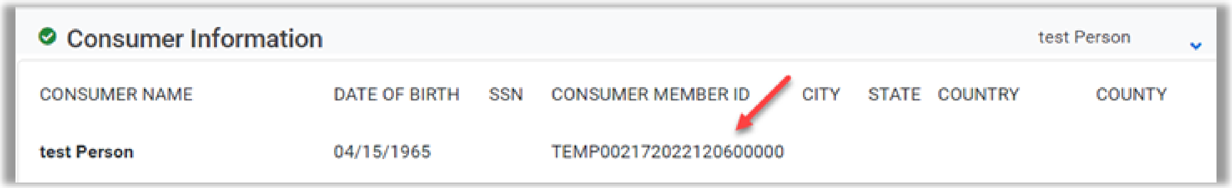
Note: Availability of this option will vary depending on contractual requirements.



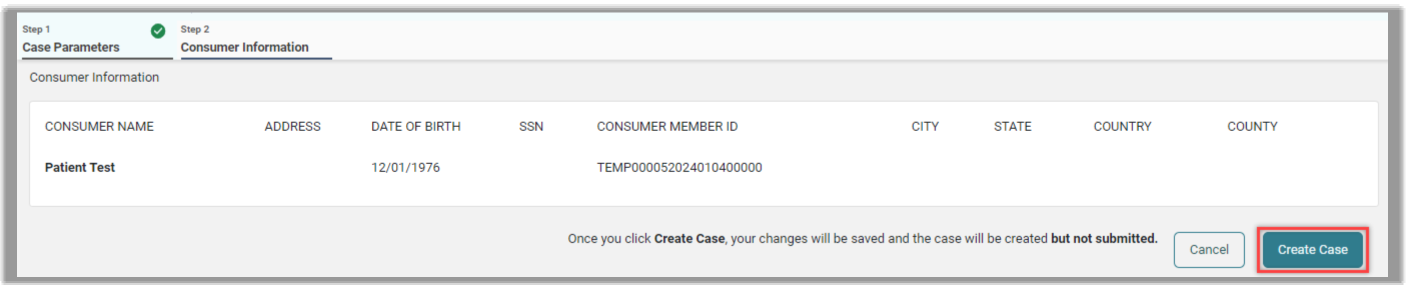
The Contract Information will autopopulate. Enter at least the required fields for Consumer Details, Contact Information, and Other Information. Then Click **Create Temporary Consumer** to be taken to the Create Case confirmation page.



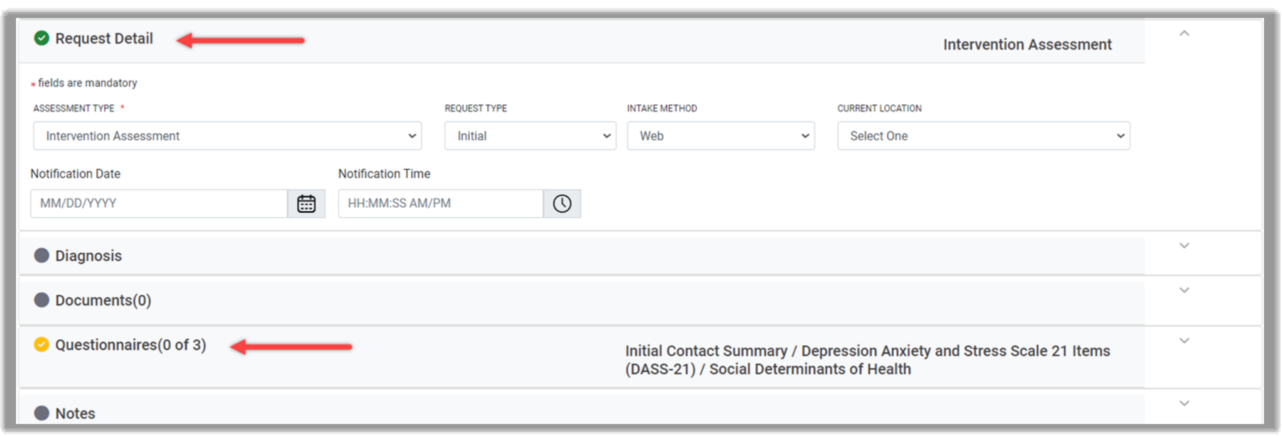
The system will create a new consumer profile and issue a temporary consumer ID. You can see in the example below that a temporary consumer ID will always start with TEMP, followed by numbers.



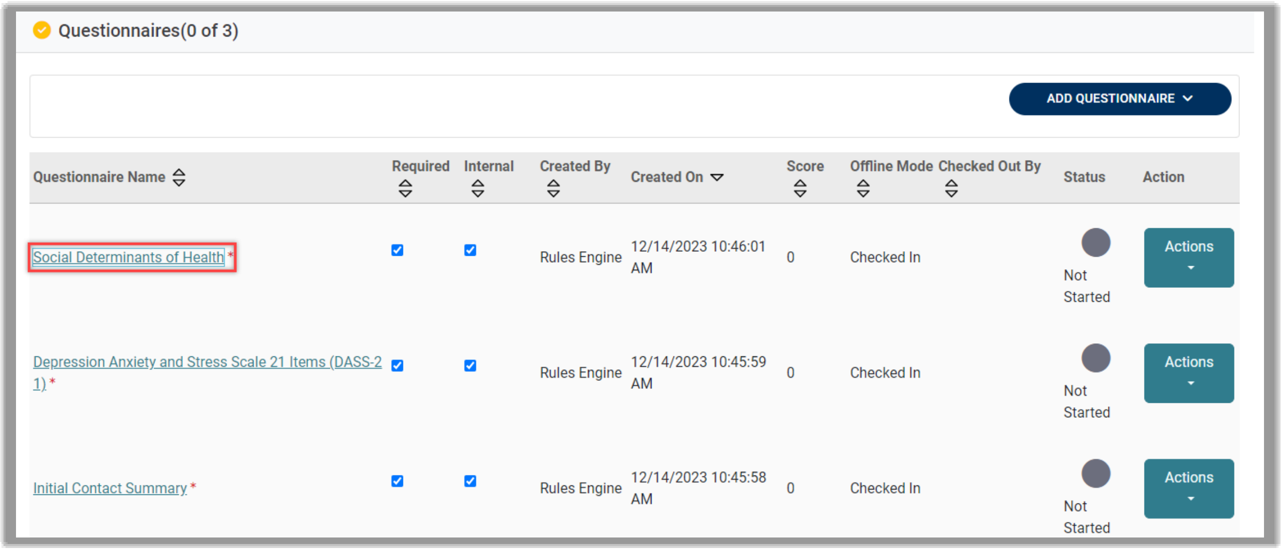
Note that once you click Create Case, your changes will be saved, and the case will be created but not submitted. To move forward, click **Create Case**.



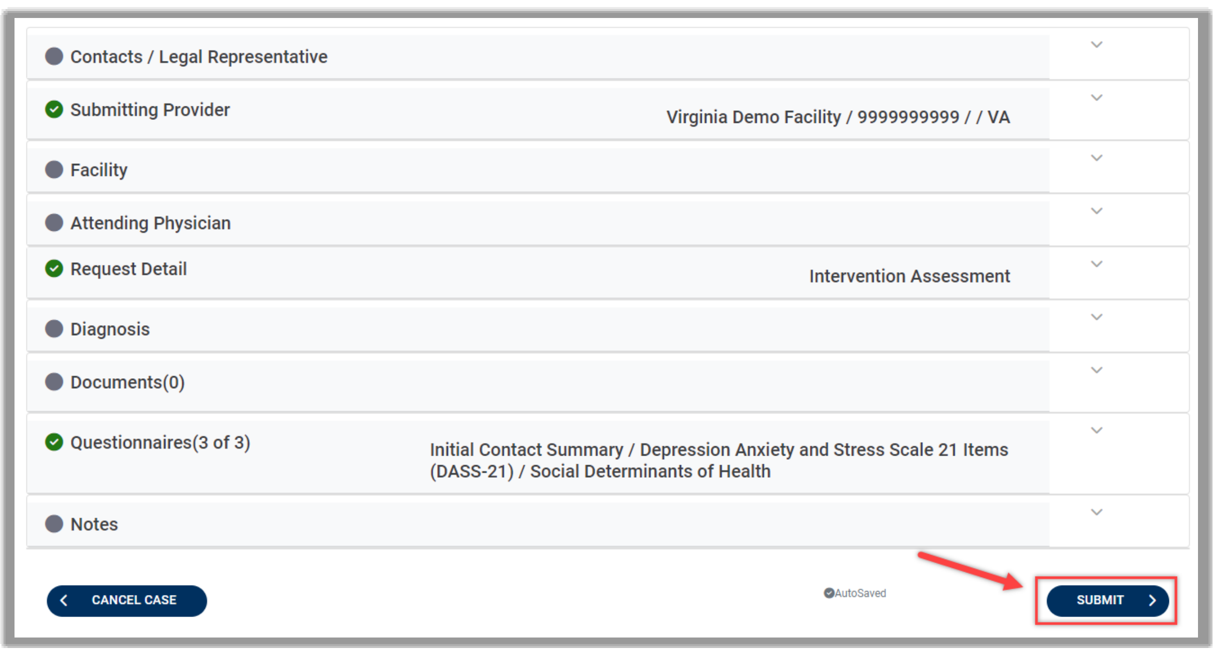
The submitting provider section will auto populate based on the provider creating the case. Complete required **Request Detail Section** to have appropriate Questionnaire added to the case.



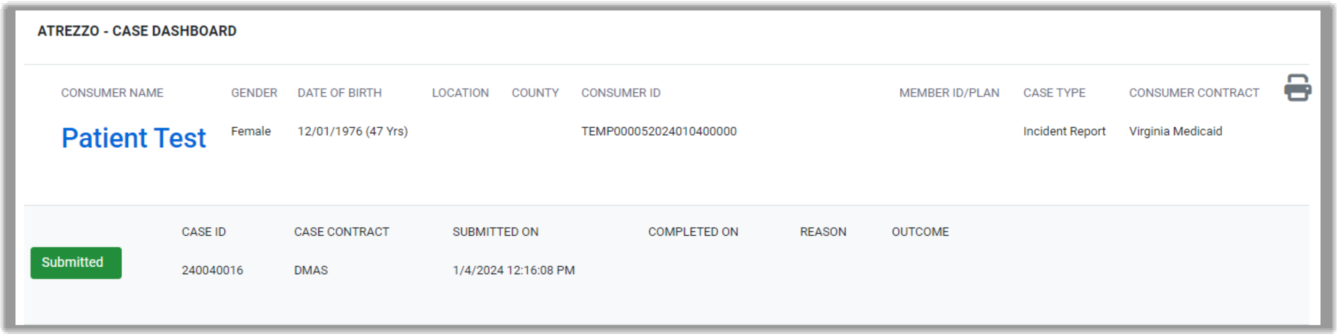
Once populated, click the arrow to open the Questionnaire section, then click the blue hyperlink to complete the questionnaire. The appropriate questionnaire will open in another tab within the browser. All questions will auto save throughout. Once all questions and all sections are complete, click **Mark as Complete**.



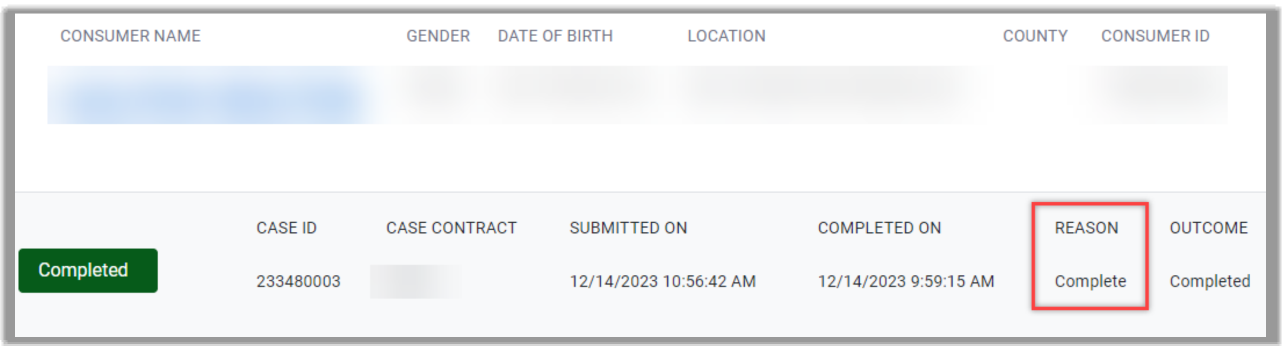
The questionnaire tab will automatically close, and you will return to the Create Case page. All required sections will be indicated complete with a green checkmark. To submit the request to Acentra Health, click **Submit**.



Once submitted, the case status will display.



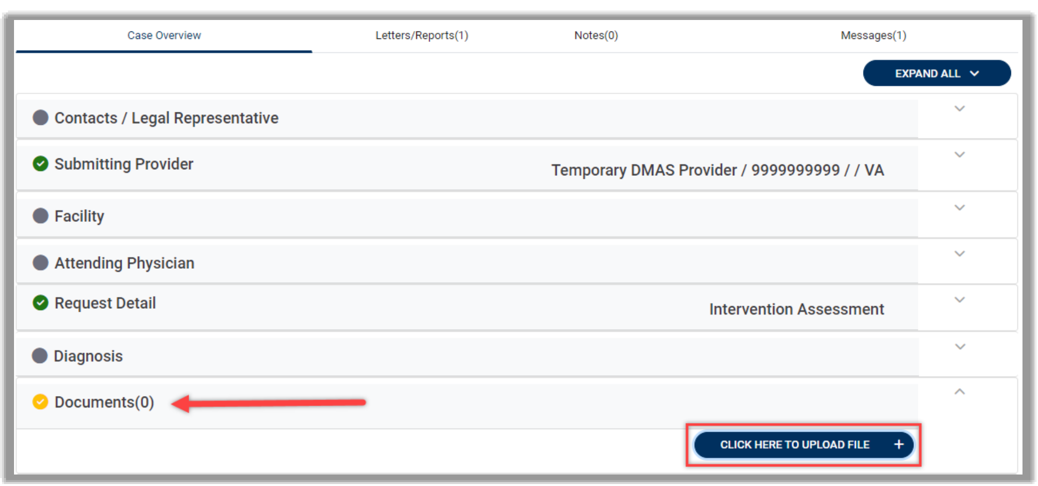
Once the review has been complete, the status will change from In Review to Completed. When a case review is complete, the Reason will indicate the outcome.



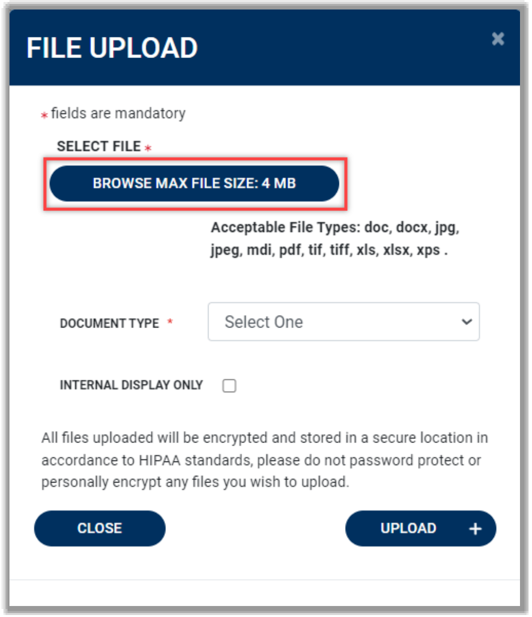
Uploading Documents

Supporting clinical documentation can be added to cases at any point in the process. Follow the instructions below to add documentation.

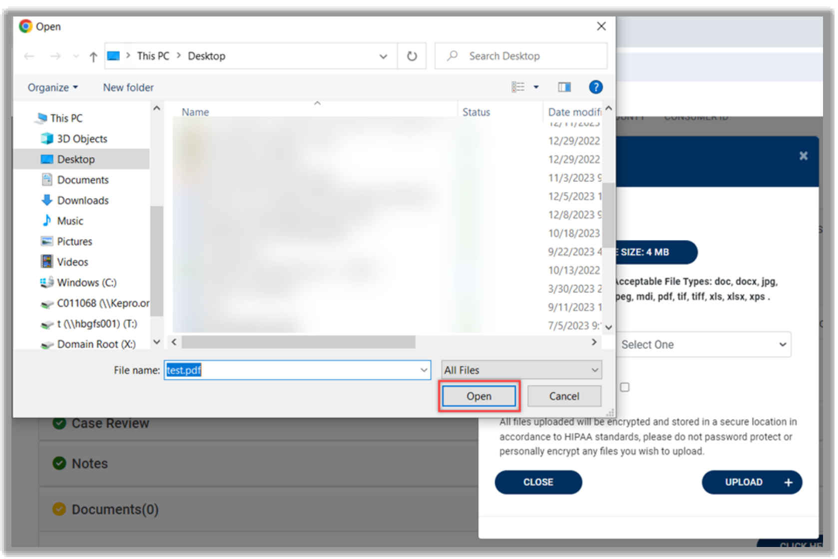
In the case, click **Review**, then click expand **Documents,** and **Click Here to Upload File**.



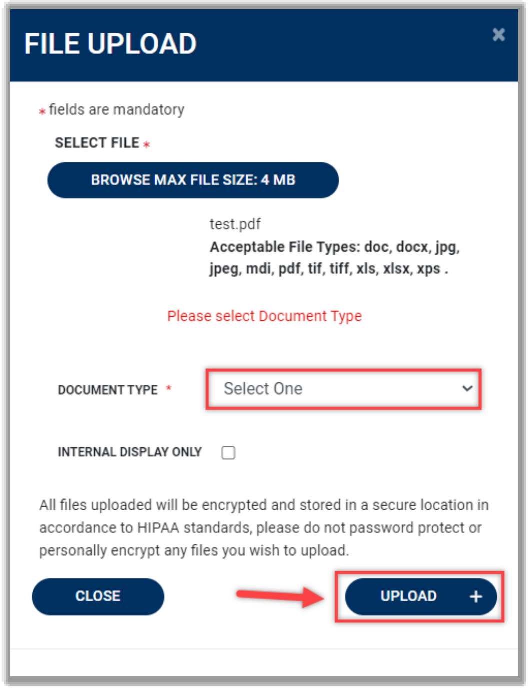
To find the designated files, click Browse.



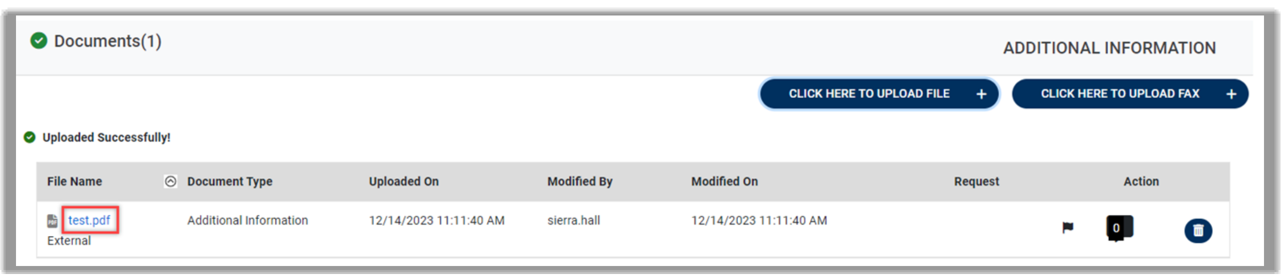
Select the necessary file and click Open.



Select the **Document Type** and click **Upload**.

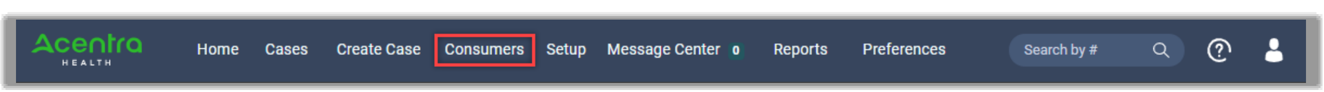


Once uploaded, documentation can be viewed by clicking the hyperlink. To upload additional documentation, follow the above steps.



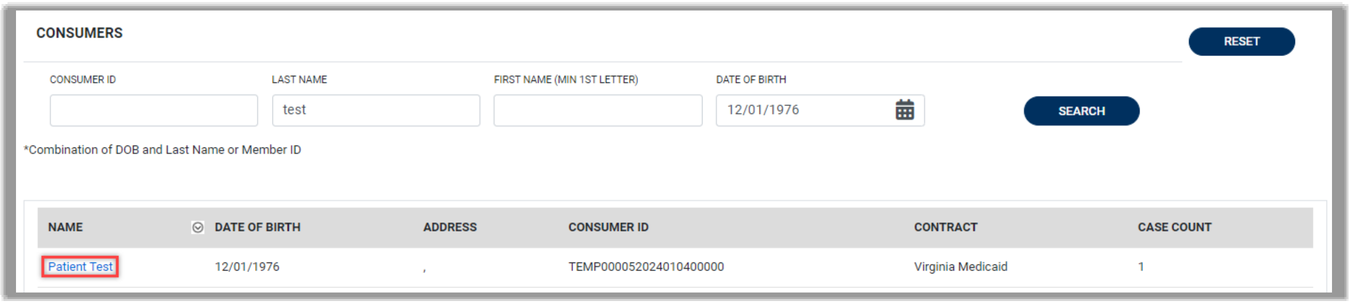
Consumers

To search by Consumer (Member/Beneficiary), click **Consumers** on the navigation pane.



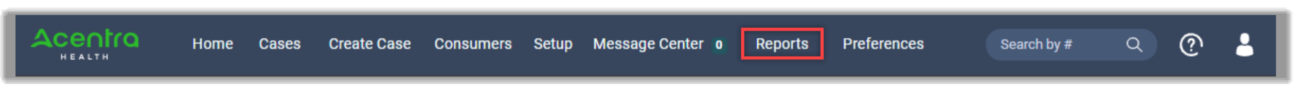
The Consumer default screen will appear providing options to search for a Consumer. This process is the same as searching the Consumer when creating a case. You must enter a Consumer ID or last name and date of birth. **Note:** Required fields will vary by contract and user permissions.

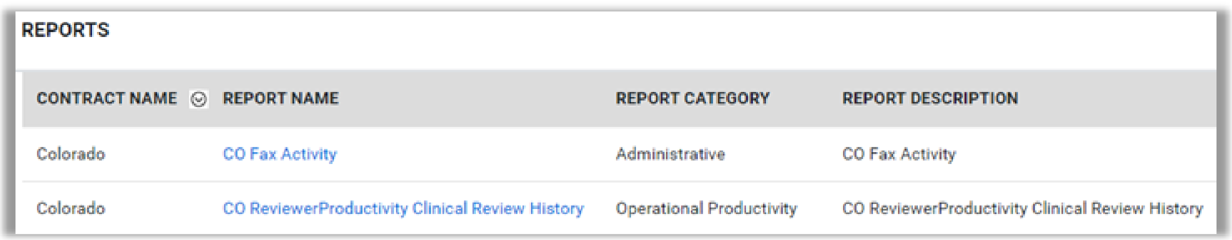
Search results will render below. To view the requests for this consumer, click on the Consumer Name hyperlink.



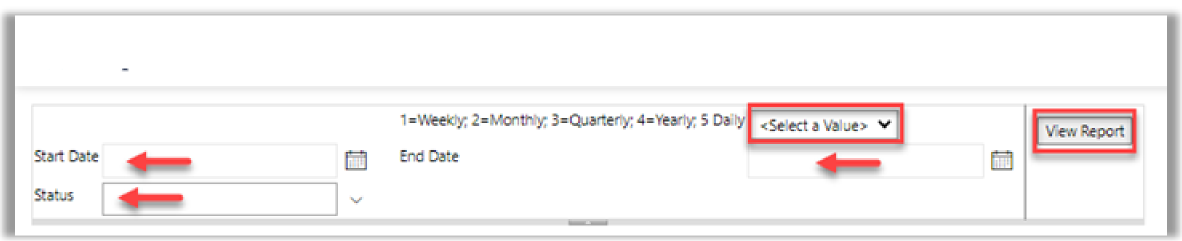
Reports

Not all users will have access to reports and availability will vary by user role and contract requirements. To view available reports, click **Reports**. The report name will be a hyperlink and open the desired report in a new tab within the internet browser.

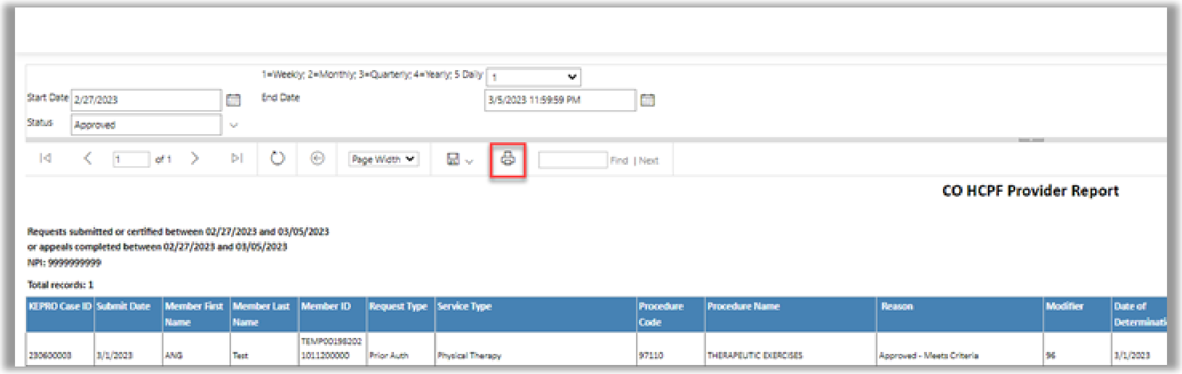




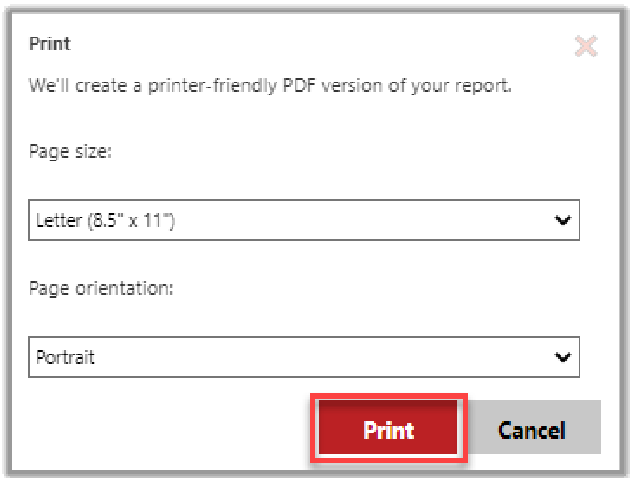
Some reports will require additional information before they are populated. In the image below, we need to provide the Start Date, Status, Time period, and End Date before clicking **View Report**.



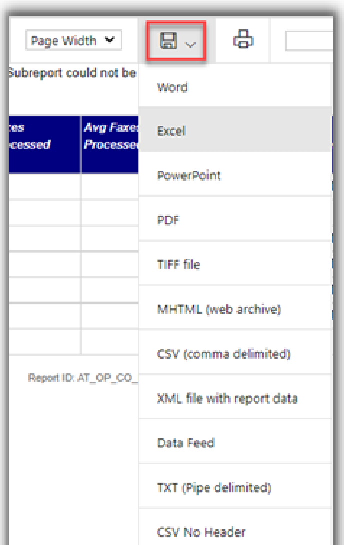
Click the **Printer** icon to bring up the Page size and Page orientation options.



Select appropriate options and click **Print** to print the report.



To export and/or download, select the **Disk** icon, choose preferred format. The document will then open in the selected format which can be saved, distributed, or printed.

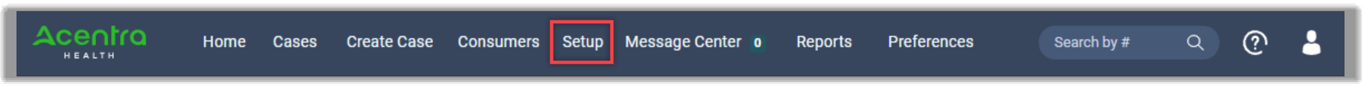


Setup

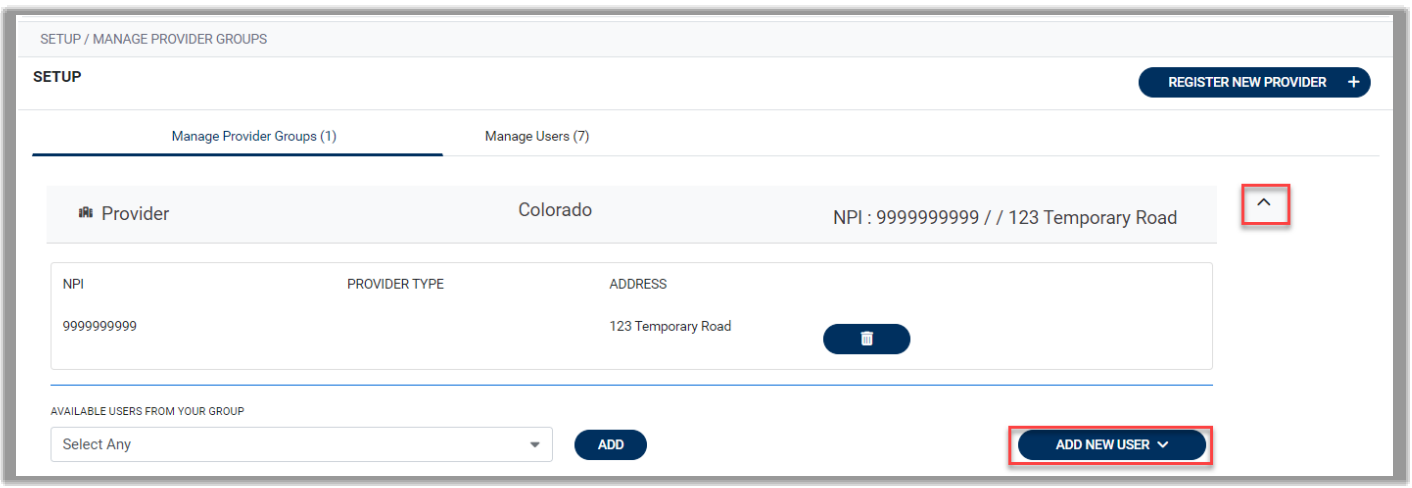
Setup is only visible to the Provider Group Administrator and Provider Administrator user roles. Setup will be used to add new users, edit users, add additional provider groups, and manage provider group assignments.

Add New User

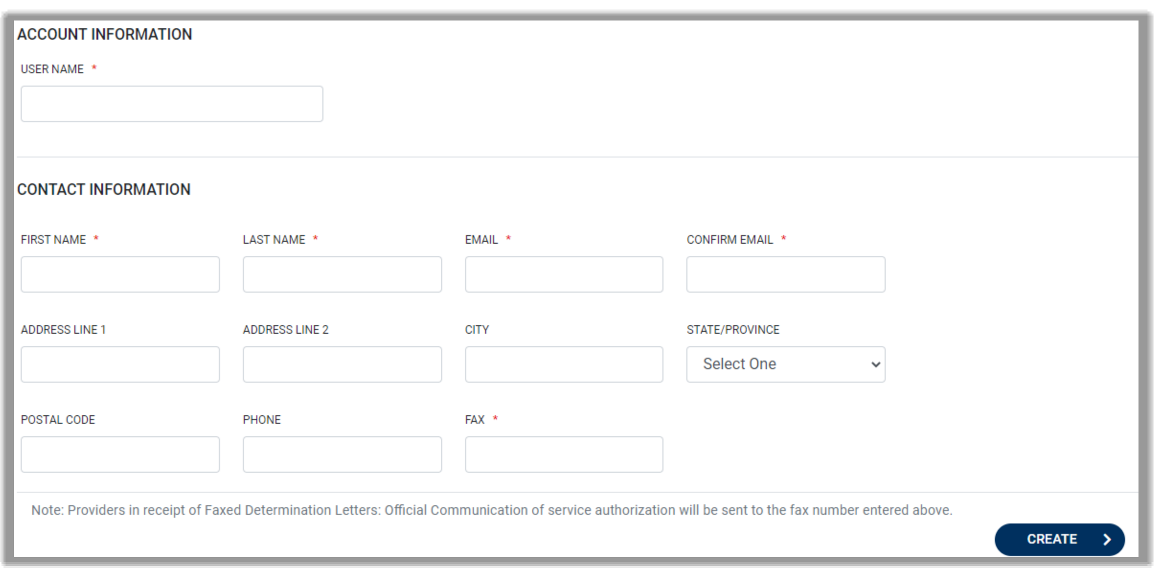
As a Provider Group Administrator, users within your facility can be added and managed locally once the group account has been registered. To begin, click **Setup** in the navigation pane.



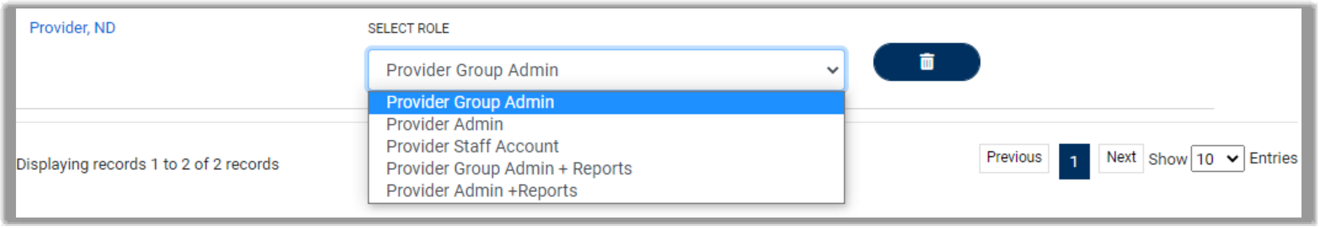
Always stay within the Manage Provider Groups tab/section to add users. Click the caret on the far right to expand the group section. Then click **Add New User**.



Create username and complete the contact information, click **Create**.



The user role will default to **Provider Staff Account**. This is the general account user. To change the user role, under Mange Provider Groups, select the Role the user should have. All accesses with Admin listed will have the ability to add and manage user roles for the assigned provider group.



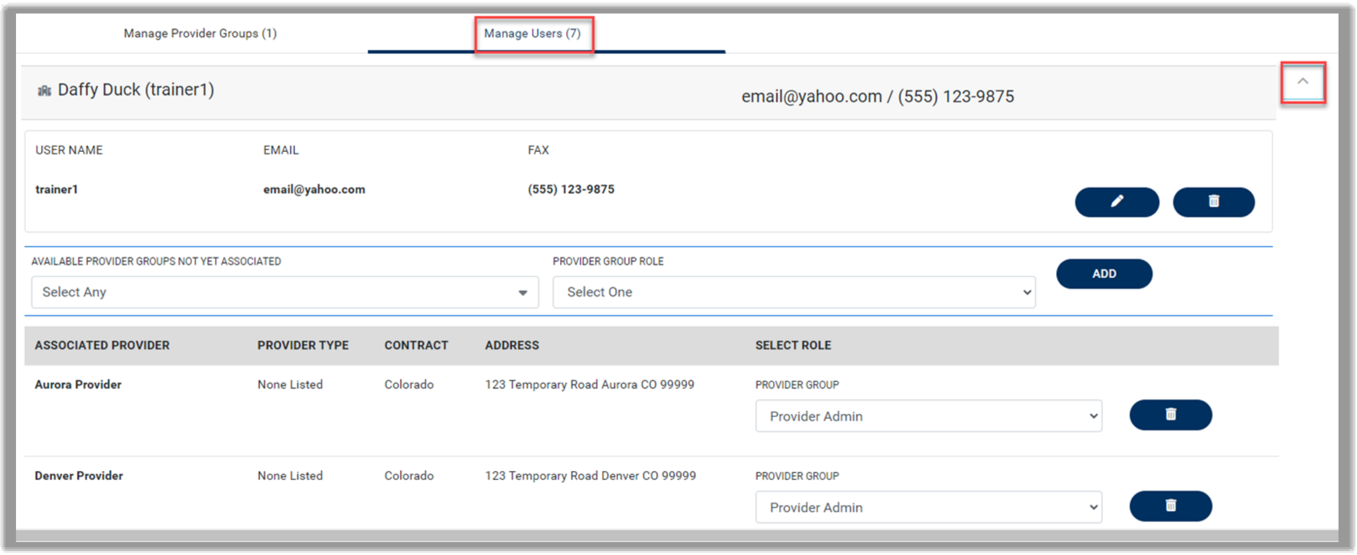
Provider Staff Account	This general user role can enter prior authorization requests into the portal and view determination letter, obtain status updates, and messages within the UM review team as needed.
Provider Group Admin	This administrator role can add and manage users for all the providers in the group. Includes Provider Staff Account access.
Provider Admin	This role can add and manage users but only for the provider they are associated with. Includes Provider Staff Account access.
Provider Group Admin + Reports	This role can add and manage users for all the providers in the group and will have access to reports. Includes Provider Staff Account access.
Provider Admin + Reports	This role can add and manage users but only for the one provider they are associated with and will have access to reports. Includes Provider Staff Account access.

The new user will receive an email with a link to complete the MFA registration process. The user must click the link in the email within 2 days, then follow the MFA registration process to complete the access request.

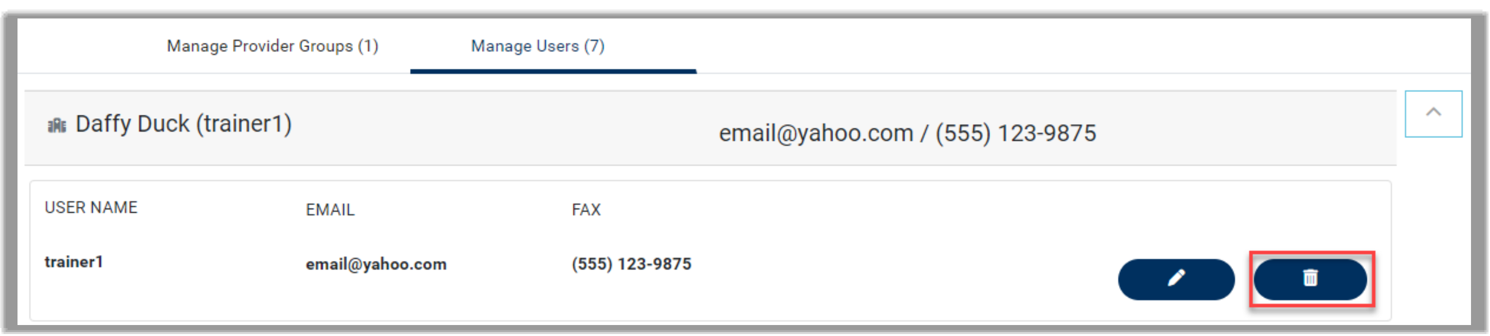
Manage Users

The Manage Users tab allows you to update a user's contact information, reset multifactor authentication registration, deactivate, and delete users.

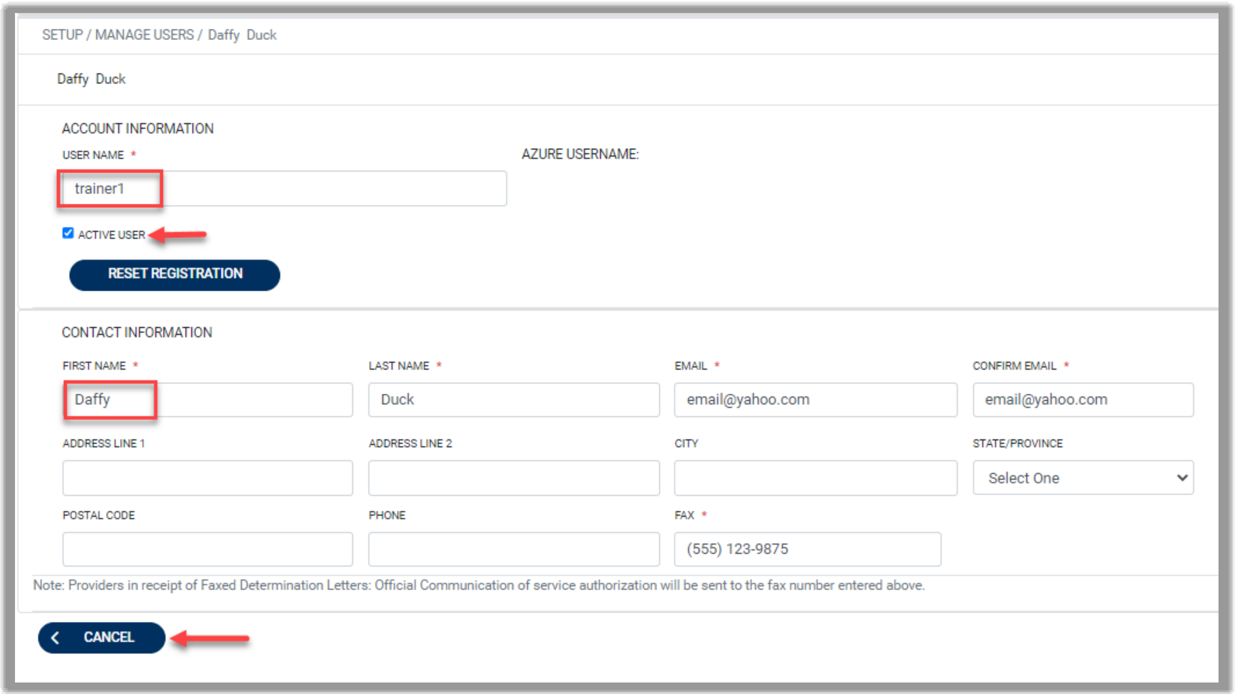
Click the **caret** associated with the appropriate user to expand available options.



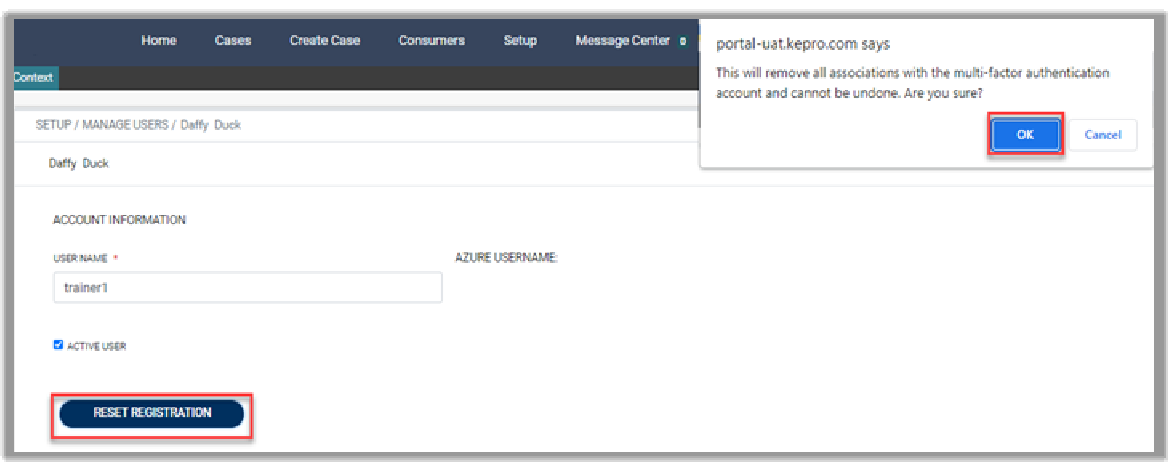
To delete a user, you can click the Trashcan Icon and confirm the deletion in the pop-up window. This will completely remove this user from the system.



Click the Pencil Icon to edit the user's information. All your changes will be autosaved unless you click **Cancel**. Notice that you can deactivate a user without deleting them by unchecking the **Active User** box.

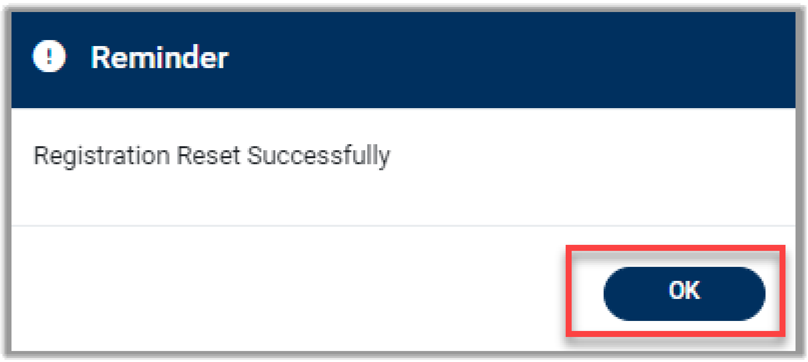


Clicking **Reset Registration** will require you to confirm that you want to remove all associations with the multi-factor authentication account. Note that this cannot be undone.

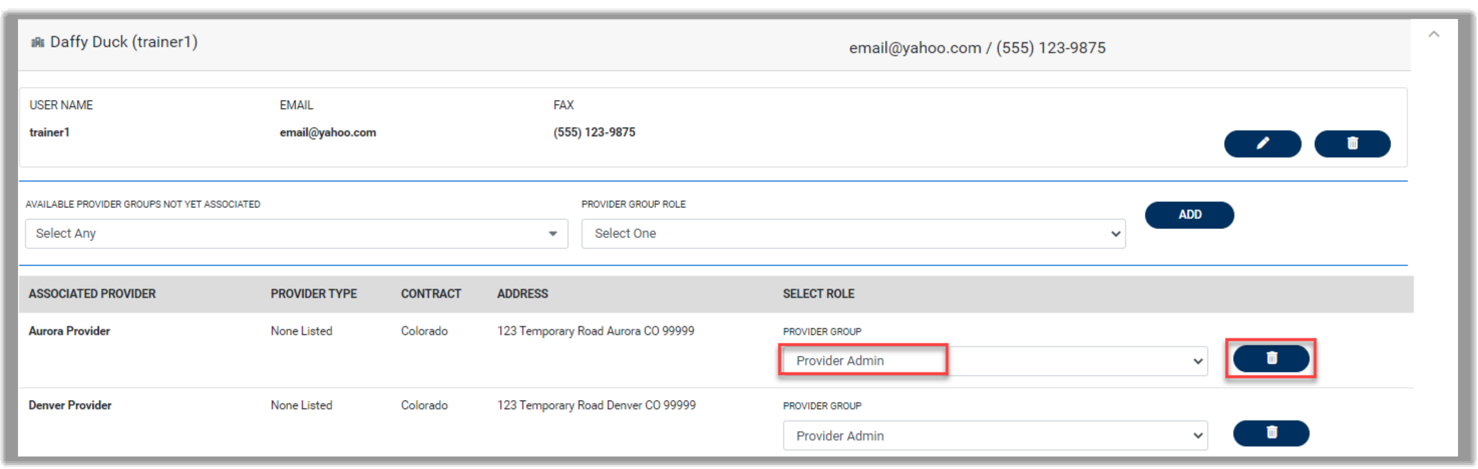


The user will receive a system generated email with a new link to complete the MFA registration process. Click **Ok** to close the pop-up window confirming the reset.

Note: This option is often used for users who do not click the link in the initial email within the 2 days prior to expiration, or for users with a non-personal email address (i.e., casemgmt@facility.com) who need to create new login credentials and complete the MFA process.

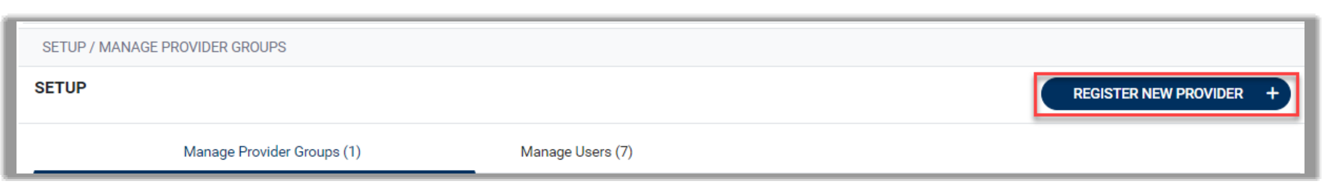


From the Manage Users tab, you can remove an associated provider from a user by clicking the trashcan icon and change their user role by selecting a new option from the Provider Group drop-down. All changes are autosaved.



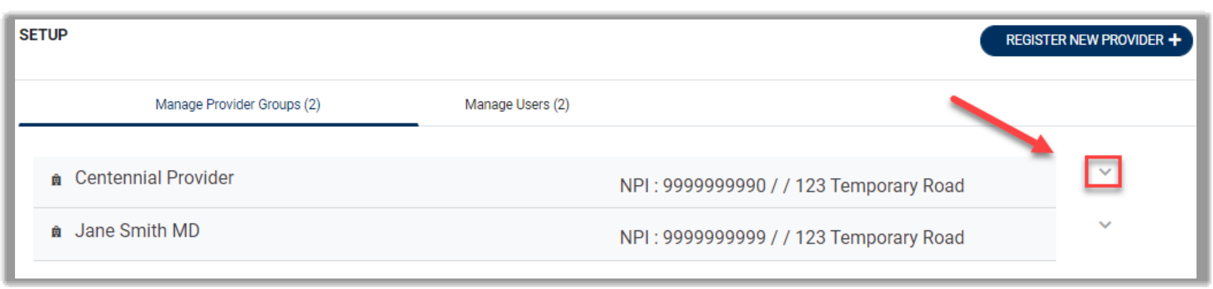
Add New Provider Group

Provider Group Administrators can manage multiple facilities or locations under the same login credentials. After the original account has been created, click **Register New Provider** in the Setup menu.



Enter the NPI and Provider Registration Code. Click **Find Provider**. Select the provider to confirm and click **Select**. **Note:** Please contact the dedicated contract support center for the registration code.

The provider will then be added to the list of providers under Manage Provider Groups. To add additional users to this Provider Group, expand the desired Provider Group and follow the steps to Add New User.



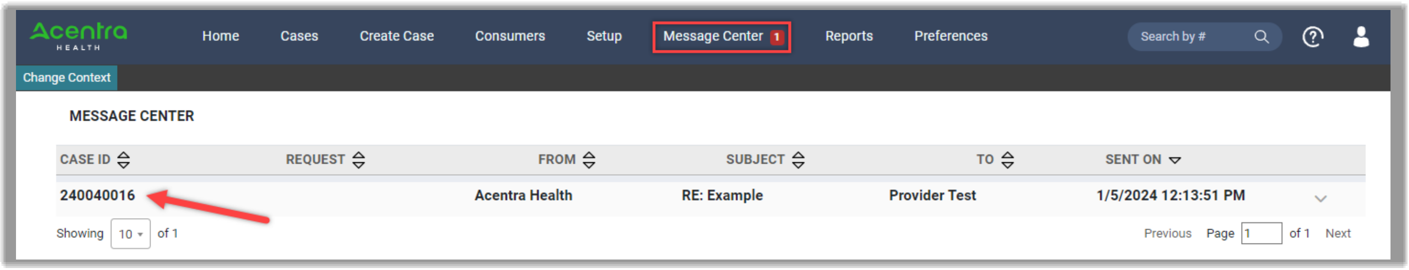
Message Center

The Message Center is a central location for all new, unread messages about cases you are associated with. The number of new messages can be seen in the navigation bar at the top. In the image below, you can see 1 unread message waiting.

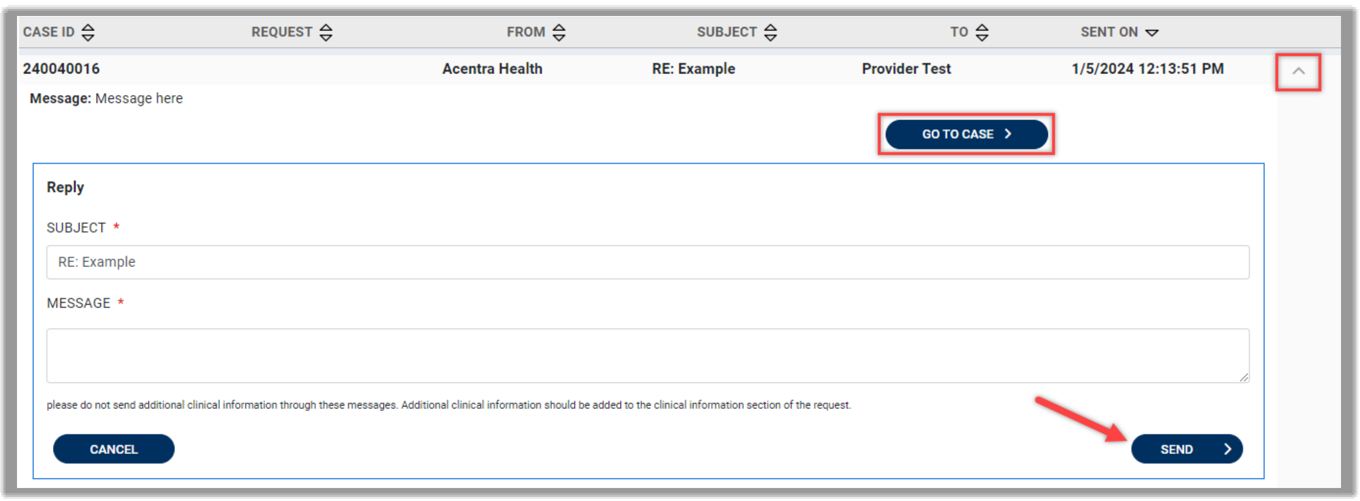
Click **Message Center** to view the message.

Note: *To send initial messages, you must be inside a specified case, rather than in the Message Center*.

The Message Center is to view and respond to messages for all cases that you are associated with.



To open/view the message, click the **caret** in the right had corner of the selected message. To view the case, click **Go to Case**. From within the Message Center, you can reply to the message by entering your message and clicking **Send**.



Troubleshooting Tips and Tricks

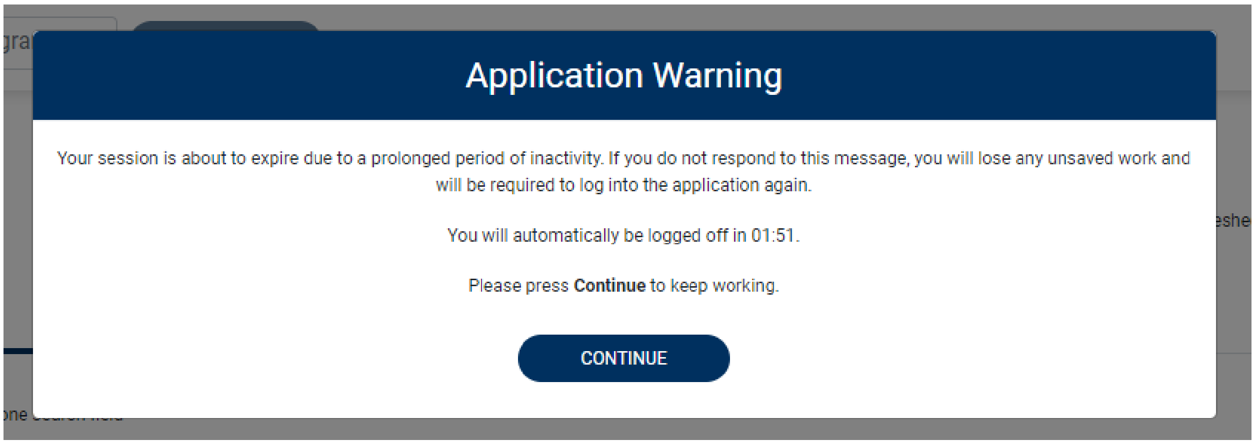
This section will identify a few troubleshooting tips and tricks to help make navigation of the system easier. For access and login instructions, please see the **Atrezzo User Guide – Access & Login Manual**.

Inactivity Warning

Important Note:

After a period of time of inactivity (15 minutes), a pop up will appear with a 2-minute countdown to logging out. If you are actively working within the system, you will not receive this pop-up warning. To continue working, select **Continue**.

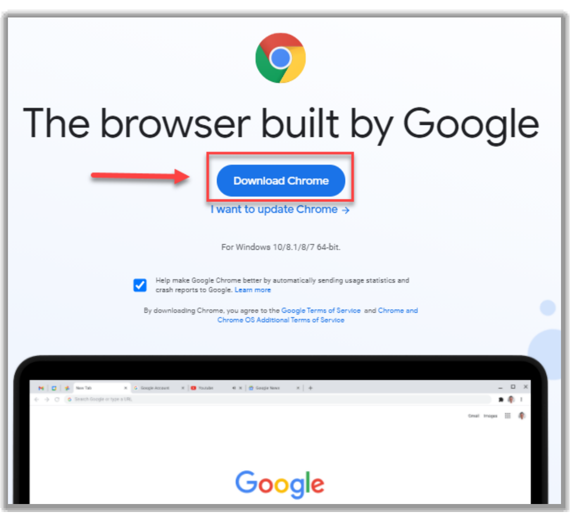
If you do not select continue before the countdown reaches 0, you will be required to log in again to continue utilizing the system. The system AutoSaves as you navigate and complete fields. Completed work will not be lost; however, any unsaved work will be lost, if the system times out due to inactivity.

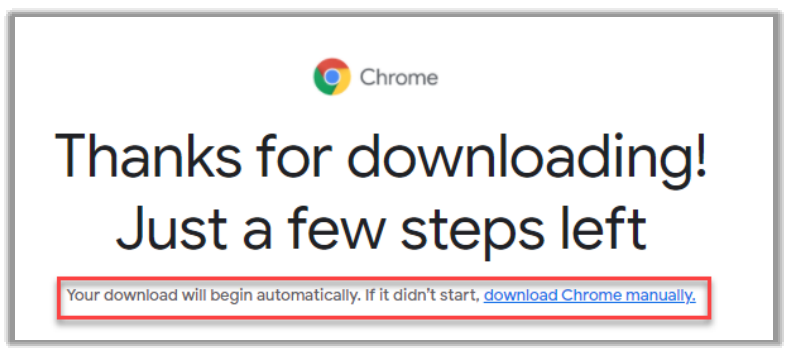


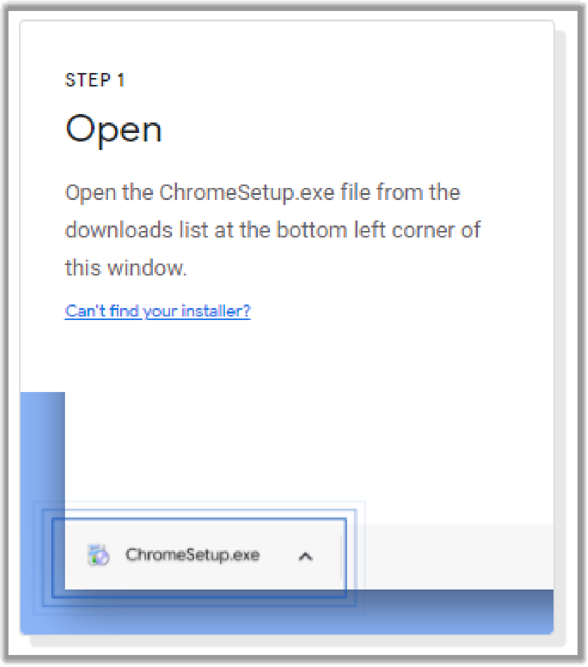
Appendices

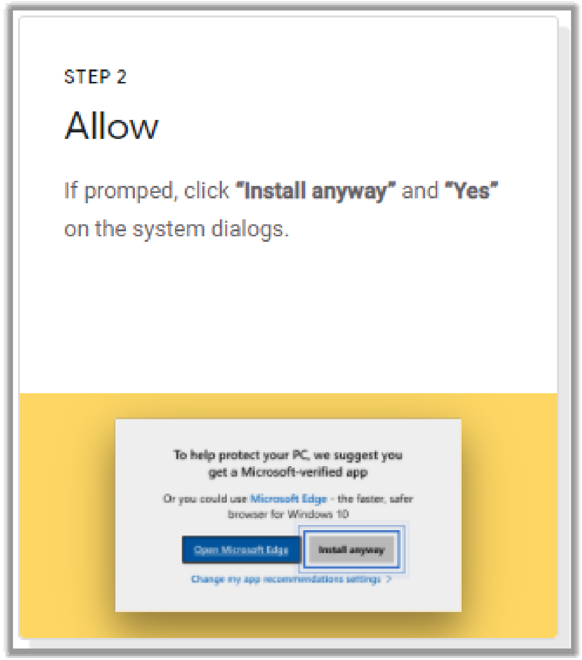
How to Add Google Chrome to Computer

A user can do a search for "Google Chrome Download" or click Download to access the available link. Once the Google Chrome Download page opens, click **Download Chrome**, then follow the prompts.

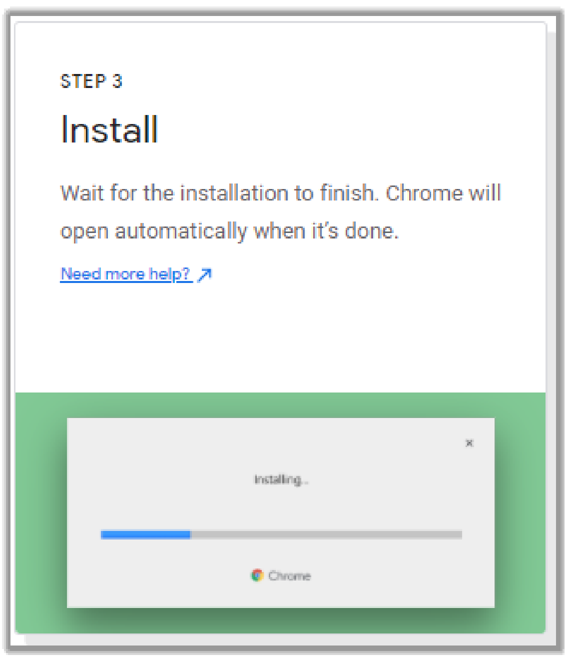






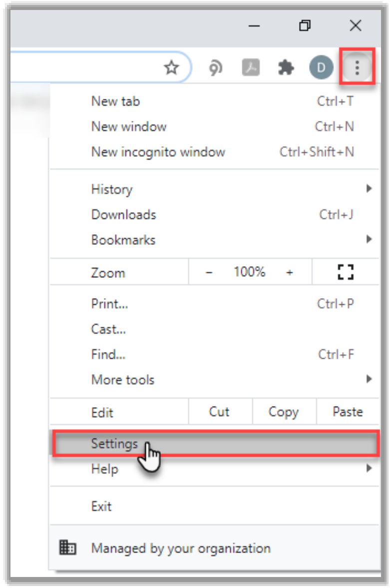


Once installed, Chrome can be set as a default browser for all applications, or you can simply create a shortcut for Atrezzo within the application.

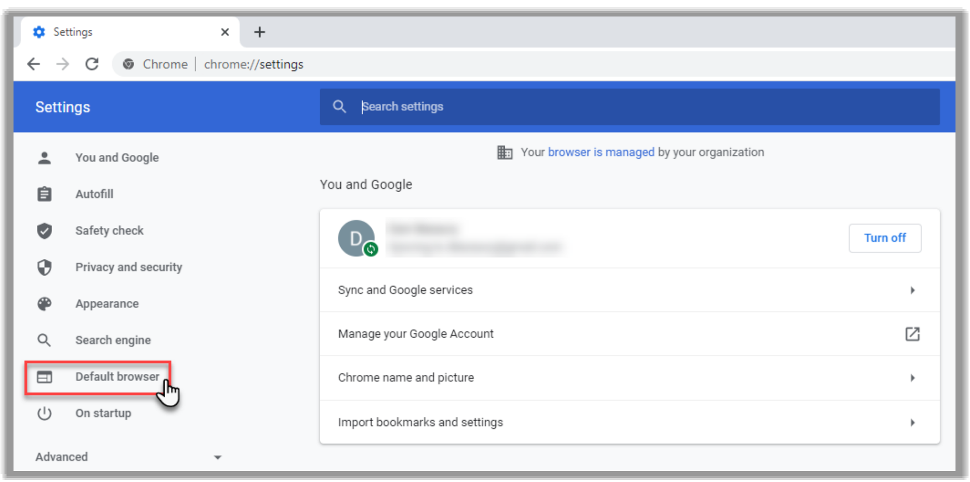


How to Set Chrome as Default Browser

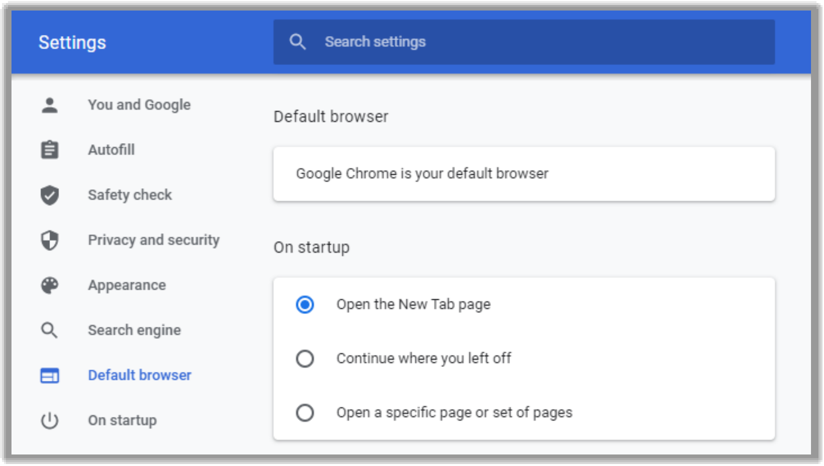
To set Chrome as the default browser, click the **three dots** in the upper right-hand corner, select Settings from the drop down.



Select Default browser from the menu options on the left side of the page.

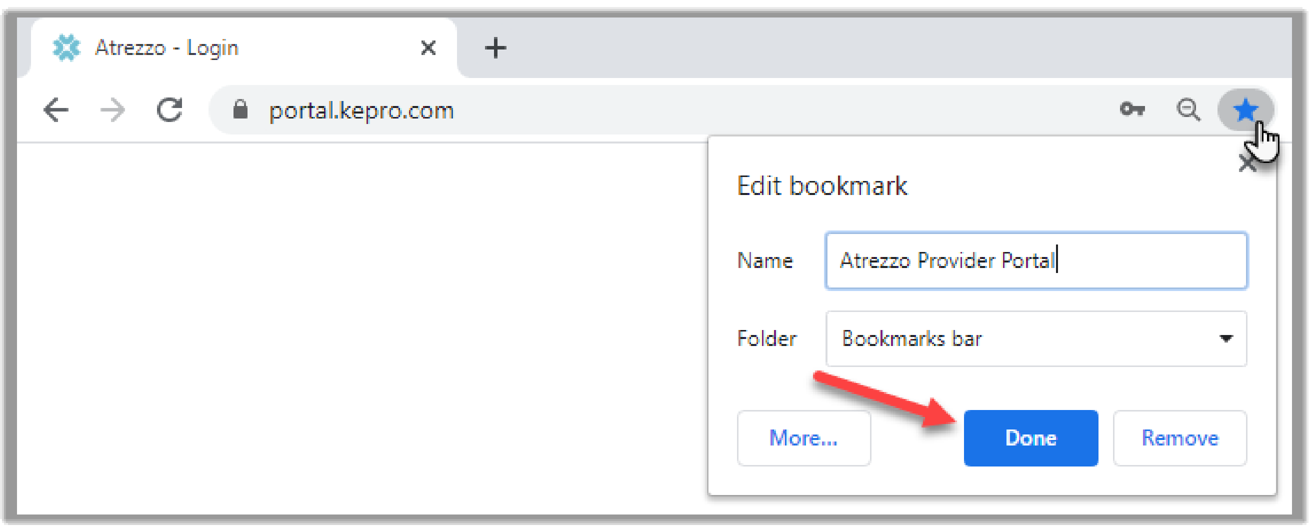


Select **Make Default** under Default browser. Once the option is selected Google Chrome is your default browser will display.



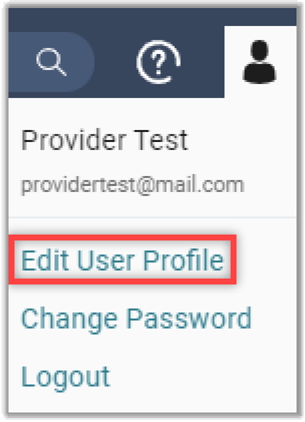
How to Set Atrezzo Bookmark in Chrome

After entering the Atrezzo portal URL https://portal.kepro.com/ into the browser and click the star in the address bar. Enter the name of the bookmark (be sure to keep the name simple so you remember it), choose a folder or add to the bookmarks bar, and click **Done**. This will set a bookmark for easy navigation and future use.

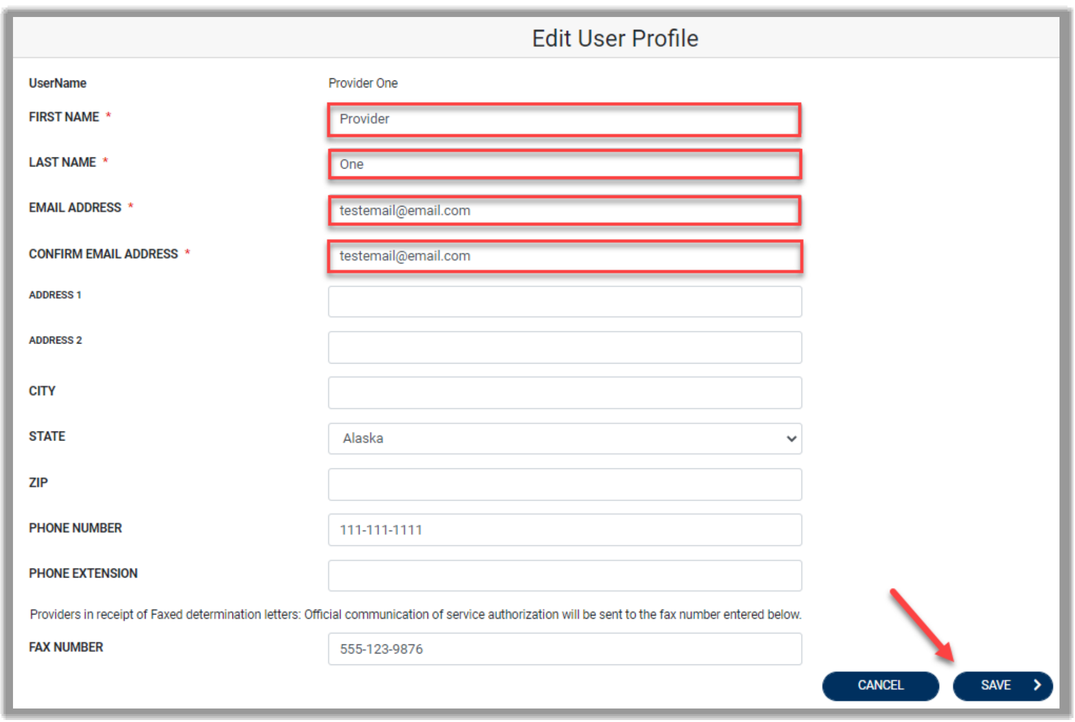


Updating User Profile

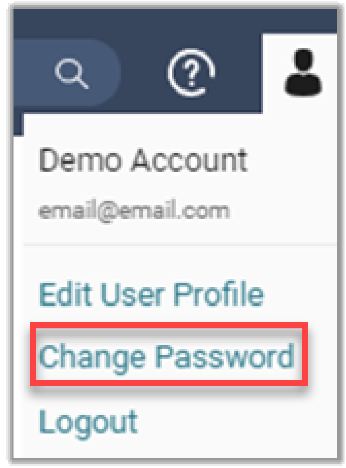
To update user profile information once an account has been created, click on the person icon in the upper right corner. Once the menu opens, click **Edit User Profile**.



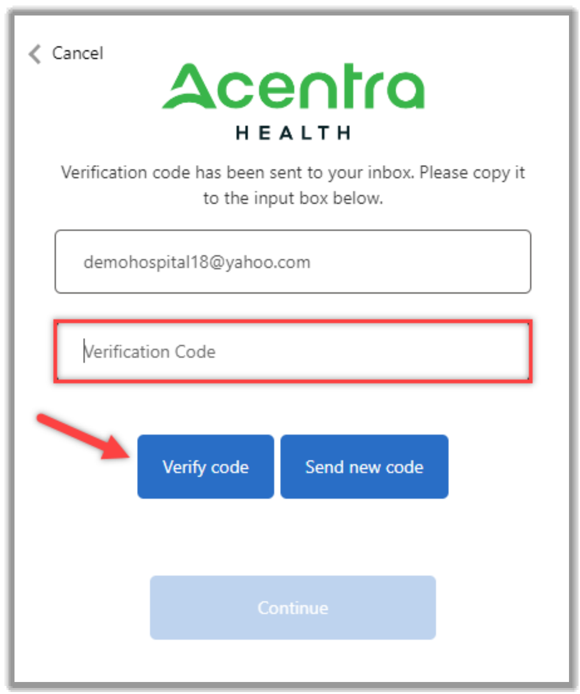
Once the profile screen displays, update information and include all required fields, then click **Save**.



Change Password



To change your password, click the person icon in the upper right corner, then select **Change Password**.



Enter the email address associated with your Atrezzo account and click **Send Verification Code**.

Enter the code from the system generated email and click **Verify Code**.

Once your email address is verified click **Continue** to change password.

Enter your new password, confirm the new password, and then click **Continue**.

The system will refresh, and you'll be taken to the home screen.

Informational Error/Warning Messages

This section will identify the different types of informational and error/warning messages that a user may see while using this platform.

Informational Message	Explanation
Servicing Provider Type Not Allowed for Service Type	This message displays when the servicing provider does not match with the requested service type. The servicing provider must be corrected to be a provider that can bill for the requested service type.
Member Ineligible	This message will display when the member does not have active coverage for the requested timeframe.
Requesting Provider Not Allowed	This message displays when the requesting provider does not match with the requested service type or is not appropriate for the service being requested.

Duplication of Services	This message will display when there is a current request for the same services within the same timeframe. You will need to return to the consumer search and locate the submitted/completed request.
Missing Information	The case cannot be submitted until all required information is submitted. Review specific fields with missing information, then click Submit.
Auth Not Required	This message will populate when one or more procedure codes do not require prior authorization.

How to Access Technical Assistance

For technical assistance, please reach out to your dedicated support team for assistance. If uncertain of the contact information, Atrezzo Help Contact Us will provide available Support Center information.