

Calling Aetna's Dedicated Provider Service Center, for Service Coordinators - Nov. 2014

1. Chapters

1.1 Title Page



1.2 Introduction

Introduction

- As part of their Standard Operating Procedure, Service Coordinators are responsible for the accurate collection of insurance information.
- This insurance information collected also includes obtaining details regarding a child's specific policy and plan information.
- Service Coordinators may have to contact insurance companies to obtain this information and verify eligibility.



1.3 Purpose

Purpose

- This guide is designed specifically to instruct Service Coordinators on how to contact Aetna for obtaining plan and policy information of a specific child.
- A step-by-step format is provided, and also includes additional details & tips on how to navigate Aetna's automated menu system.



1.4 Service Coordinator Duties

Service Coordinator Duties

- Accurate information collection is only one part of the Service Coordinator's duties.
- Further detail on the Service Coordinator's role can be explored by visiting 'Training 103, Part I', available on the Training tab of the EIBilling Website (www.eibilling.com).
- A link to the course is available by clicking [here](#).



1.5 Aetna versus EI Language

Aetna versus EI Language

Aetna uses language on their call that differs from the EI World. See below for a translation matrix.

Aetna

Patient

Self-Funded

Commercially Funded

EI World

Child

Unregulated

Regulated



1.6 Prior to Calling

Prior to Calling

Prior to contacting Aetna, be sure to have the following pieces of information:

1. Child Name and Date of Birth (DOB)
2. Policy Number
3. Provider NPI or Tax ID Number
4. Child ZIP Code (has been occasionally requested)



1.7 Step-by-Step Procedure

Calling Aetna's Dedicated Provider Service Center

Step-by-Step Procedure



1.8 Aetna Call Checklist

Aetna Call Checklist

1. Call Aetna Provider Service Center at 1-800-624-0756
2. Enter Provider NPI/Tax ID Number
3. Select Option "2", for Coverage and Benefits
4. Enter Child Policy Number and Date of Birth
5. Confirm child's identity
6. Choose information delivery via fax or phone
7. Receive information via desired method
8. Request additional information
9. End call or select additional options, ex: review another policy



1.9 Step 1 - Call Aetna

Step 1 - Call Aetna

Call the Aetna Dedicated Provider Service Center:

1-800-624-0756



1.10 Step 2 - Enter NPI/Tax ID Number

Step 2 - Enter NPI/Tax ID Number

Say or enter the Provider NPI or Tax ID Number.

- This number is the NPI or Tax ID number of the Provider you are calling on behalf of.
- NPI Number is ten (10) digits - Tax ID Number is nine (9) digits.
- Information may be entered by using the keypad or by speaking into the phone.



1.11 Step 3 - Coverage and Benefits

Step 3 - Coverage and Benefits

Say or Press Option Number "2", for Coverage and Benefits

- The audio prompts may be confusing, as it could appear that a different option is required.
- However, please be assured it is Option "2".
- The phrase "Coverage and Benefits" may also be spoken.



1.12 Step 4 - Enter Child Information

Step 4 - Enter Child Information

Say or enter the following information:

1. Aetna ID (same as Policy Number)
 2. Date of Birth (DOB) in MMDDYYYY format
- Omit the letter "W" if it precedes the policy number.
 - If three (3) letters precede the numerals, enter or speak all characters.
 - If speaking the date, use the word for month; i.e., "May 5, 2012".
 - Enter subscriber's ZIP Code if prompted, as it is occasionally requested.



1.13 Invalid Policy Information

Invalid Policy Information

If the system does not recognize the Policy ID as a valid number, the Subscriber Social Security Number (SSN) is requested.

Service Coordinators (SC's) should not be requesting this number for insurance purposes

The SC may have this information if employed by a municipality in the Early Intervention official designee role.

Proceed with entering this number if known.



1.14 Invalid Policy Information

Invalid Policy Information

If any of the information is incorrect, the caller has one of two options if the SSN is not available:

- Verify the accuracy of the information, hang up, and call again.
- Remain on the line to speak to a live representative.



1.15 Step 5 - Confirm Child Identity

Step 5 - Confirm Child Identity

Confirm the child's identity by saying or pressing
"Yes" or "1" <-----> "No" or "2"

- Multiple plans may be listed for a child.
- Example - Medical and Vision.
- Multiple siblings may be listed on the same policy.

Say or press the appropriate option if presented.



1.16 Step 6 - Information Delivery

Step 6 - Information Delivery

Press "2" or say "Have it Faxed" to receive via fax
-OR-

Remain on the line to receive over the phone

Enter a valid 10-digit fax number for transmission.

Please note that the system will not accept fax numbers beginning with "900" or "0".

Information will be delivered by phone after about a 10-second delay, if the fax option is not chosen.



1.17 Reminder - Aetna/EI Language

Reminder - Aetna/EI Language

As a reminder, Aetna uses language on their call that differs from the EI World.

See below for a translation matrix.

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1.18 Step 7a - Phone Delivery

Step 7a - Phone Delivery

Policy and plan information will be delivered via phone

- Reference number for the call
- Active or Inactive Coverage
- If Active, the type of plan and funding
- Effective Date (if Active), or Termination Date (if Inactive)
- Group Number
- Primary Care Provider (PCP) - not always given



1.19 Step 7b - Fax Delivery

Step 7b - Fax Delivery

Policy and plan information will be sent via fax.

A sample of this documentation is on the next slide.

Any information that could be used for identification has been rendered non-viewable for privacy purposes.



1.20 Sample Fax from Aetna

aetna™			
Coverage & Benefits Basic Eligibility Information			
Please note that any benefit information furnished is not a guarantee of payment nor a determination of medical necessity and final claim determination will be made upon receipt and review of the claim.			
Sent Date		10/02/2014	
Sent Time		12:39 PM Eastern Time	
Claim Mailing Address		PO Box 981106, El Paso, TX, 79998-1106	
Inquiring Provider			
Provider ID		[REDACTED]	
Call Reference #		AVA [REDACTED]	
Plan Information			
Plan Name		Aexcel® Plus Aetna Choice® POS II, Self Funded	
Referral Information		This plan does not require referrals from the member's primary care physician.	
Patient Information			
Patient ID		[REDACTED]	
Patient First Name		[REDACTED]	
Patient Last Name		[REDACTED]	
Relationship to Subscriber		[REDACTED]	
Subscriber Information			
Subscriber First Name		[REDACTED]	
Subscriber Last Name		[REDACTED]	
Group Information			
Group Number		[REDACTED]	
Plan Sponsor Name		[REDACTED]	
Coverage Type		[REDACTED]	
Eligibility Information			
Plan Effective Date		08/15/2010	
Original Effective Date		08/15/2010 20	
Termination Date		Not applicable; patient has active coverage.	

1.21 Information Not Provided?

Information Not Provided?

There are two primary cause for not immediately receiving information via phone or fax from Aetna.

Cause: Incorrect or incomplete data has been entered.

Resolution: Ensure the accuracy of the information collected, and re-try the call.

Cause: In some cases, an Aetna representative must be spoken to prior to the release of information.

Resolution: Remain on the line, and follow the instructions to reach a live representative.



1.22 Step 8 - More Information?

Step 8 - More Information?

More information on active plans is available, such as Deductibles, Copays, and Coinsurance.

If needed, speak "Yes" or press "1".
Otherwise, speak "No" or press "2" to proceed.



1.23 Step 9 - End of Call

Step 9 - End of Call

A list of options is available at the end of the call.

- Select an option if additional services are required.
- Hang up the phone if nothing else is needed.

The Menu Options List is on the next slide.

Highlights of the list include:

- Requesting a fax copy of the information
- Repeating the information over the phone
- Requesting plan information for additional children



1.24 Step 9 - End of Call (cont.)

Step 9 - End of Call (cont.)

End-of-Call Menu Options

<u>Press Option #</u>	OR	<u>Speak</u>
1		"Repeat That"
2		"Fax It"
3		"Check Other Coverage"
4		"Next Patient"
5		"Main Address"
6		"Main Menu"

If no additional services are required, either hang up or Speak "Goodbye".



1.25 Wrap-Up

Wrap-Up

- Service Coordinators (SC's) are responsible for accurate insurance information collection, and may have to contact insurance companies to obtain/validate this information.
- This procedure outlines the specific steps the SC can take to contact Aetna.
- The role of the SC can be reviewed by viewing SC Training 103, Part I, available on the Training tab of www.eibilling.com, or by clicking [here](#).



1.26 Additional Resources

Additional Resources

Available via the 'Resources' link on the Player

- Link to EI Billing
- Link to SC 103 Course
- Quick Reference Guide
 - Step-by-Step Call Checklist
 - Aetna versus EI Language Chart



1.27 Contact Information

Contact Information

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Instructional Trainer

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Instructional Trainer

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Monday-Friday, 7a-7p
1-866-315-3747



1.28 Corporate Information



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