

Web Guidebook for Parameds.Com Website

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Customer Service Number at
888-766-3999**

This document will help walk you through the ordering procedure and how to check status on cases from within the domain of Parameds.com. You will learn all that you need to know to becoming a Parameds.com power-user. Let's get you started!

Navigate your web browser to the website address: www.parameds.com.



Figure 1 – www.parameds.com Home Page

Click on the secure Log In options from either side of the web site. Keep in mind, either log in will bring you to the same information. (See Figure 2 – next page).

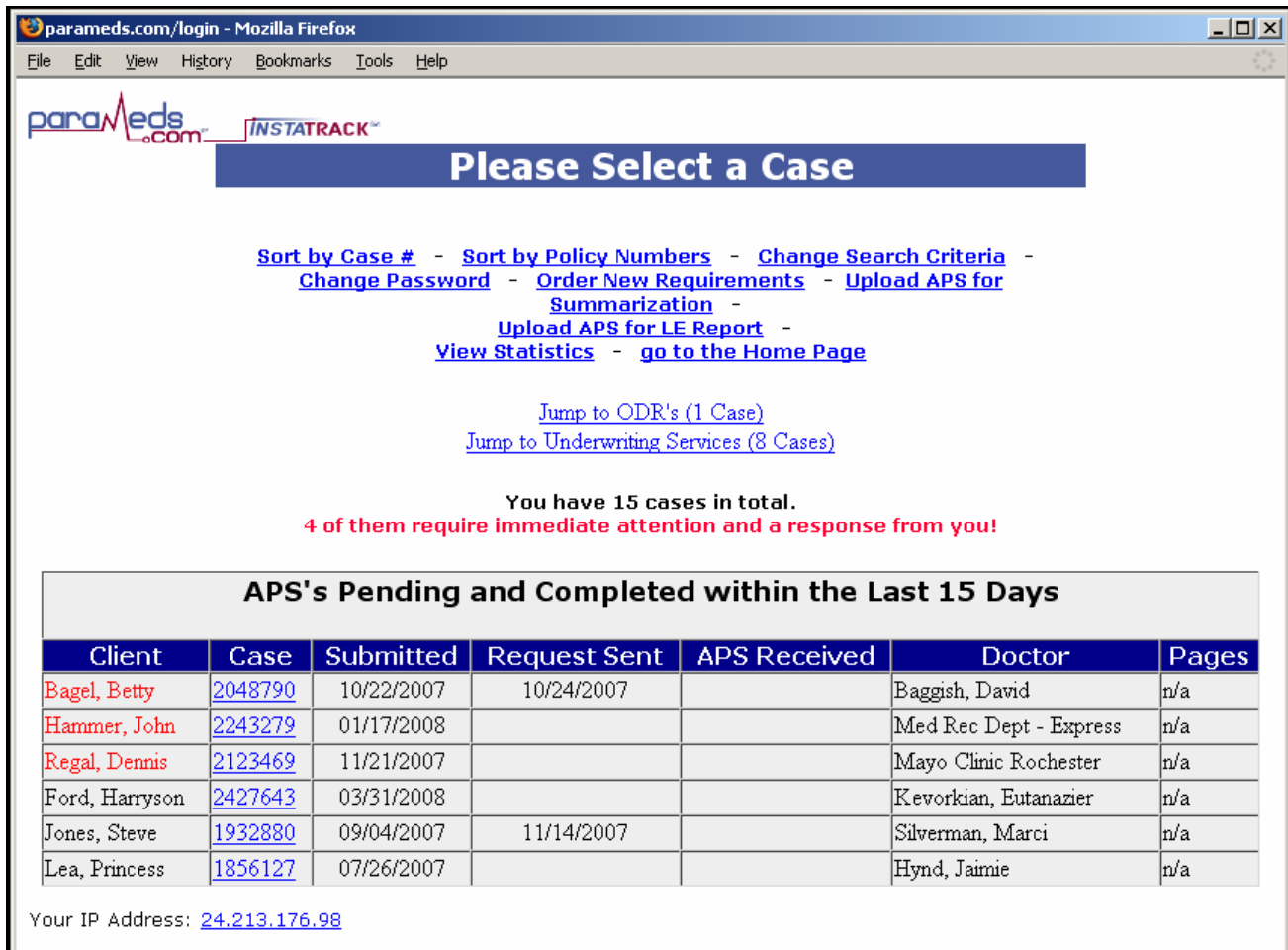


Figure 2 –The Login Screen

Once you type in your username and password, most people will be prompted to save their username and password combination for future use. We do not recommend doing this unless your computer system is in a secure environment where you will be the only user or whereby you feel supremely confident that no one will be using your computer to view privileged material and the information contained within the Parameds.com domain.

Type your username and password, and click Submit.

Upon first logging into the site you will be presented with the most recent cases that are active or completed in the last 15 days (considered a case managers "pending" case list). If you are set up with us as an underwriter, you will be presented with the case list that reflects all cases completed within the last 15 days. Here is an example of a case manager's login.



The screenshot shows a web browser window with the URL `parameds.com/login`. The page title is "Please Select a Case". Below the title are several navigation links: [Sort by Case #](#), [Sort by Policy Numbers](#), [Change Search Criteria](#), [Change Password](#), [Order New Requirements](#), [Upload APS for Summarization](#), [Upload APS for LE Report](#), [View Statistics](#), and [go to the Home Page](#). There are also links for [Jump to ODR's \(1 Case\)](#) and [Jump to Underwriting Services \(8 Cases\)](#). A red notification states: "You have 15 cases in total. 4 of them require immediate attention and a response from you!". Below this is a table titled "APS's Pending and Completed within the Last 15 Days".

Client	Case	Submitted	Request Sent	APS Received	Doctor	Pages
Bagel, Betty	2048790	10/22/2007	10/24/2007		Baggish, David	n/a
Hammer, John	2243279	01/17/2008			Med Rec Dept - Express	n/a
Regal, Dennis	2123469	11/21/2007			Mayo Clinic Rochester	n/a
Ford, Harryson	2427643	03/31/2008			Kevorkian, Eutanazier	n/a
Jones, Steve	1932880	09/04/2007	11/14/2007		Silverman, Marci	n/a
Lea, Princess	1856127	07/26/2007			Hynd, Jaimie	n/a

Your IP Address: [24.213.176.98](#)

Figure 3 – Case Managers Pending Case List

ORDERING A NEW CASE

- 1) On the top of the Case List screen there are several "hot links". To order an APS, click on the link that says [Order New Requirements](#).
- 2) You will be directed to a **Case Order Form**.

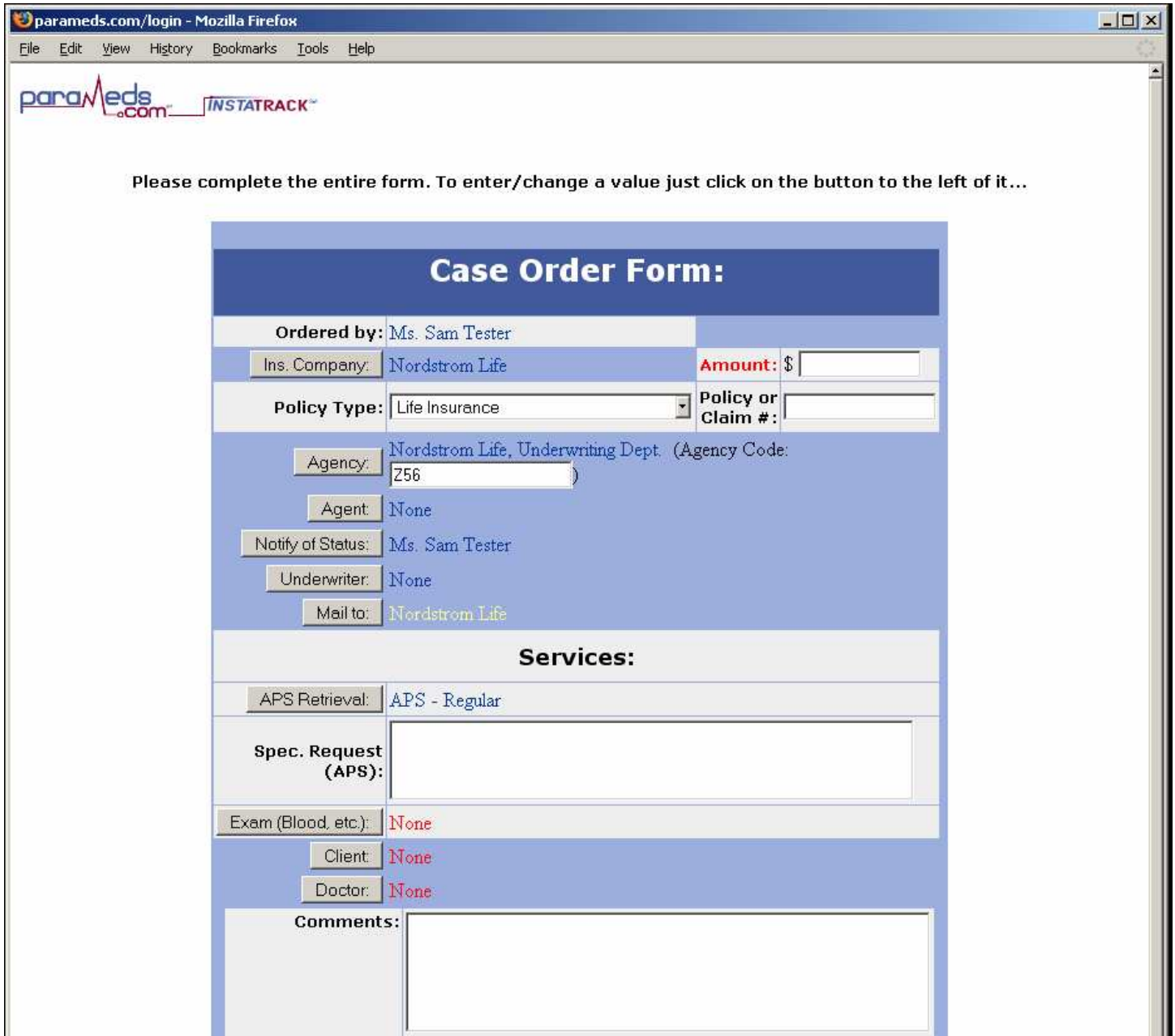


Figure 4 – Case Order Form

- 3) Your screen will read:
- a. **Ordered by:** Your name should appear here.
 - b. **Preset for:** This is for Exams only. If you are ordering an APS, leave this area blank.
 - c. **Insurance Company:** Please ensure that you have selected the correct insurance company name is in this field. You can change the insurance company by clicking the grey button and selecting from our extensive Carrier database. If you are a Brokerage Firm, and would like us to receive the APS, and have us bill you directly, please choose the Insurance company entitled:

“To Be Determined”. (Note: This field may have a default insurance company selected for you)

- d. **Amount:** (optional) Enter the policy amount.
- e. **Policy Type:** Please choose an option from the drop down menu. (Note: this field may have a default policy type selected for you)
- f. **Policy Number:** This is strictly for your reference.
- g. **Agency:** Please ensure that the correct agency is in this field. You can change the agency by clicking on the grey button. If you are placing an order from the Home office the agency will reflect the underwriting department of your Home office.
- h. **Agent:** (optional) Please select the agent on the case.
- i. **Agency code:** (optional) please enter if applicable.
- j. **Notify of Status:** The person listed in this field will be sent an email each time a case is updated. Please note, the “Notify” has an option to receive *all* status emails or *just* CRITICAL STATUS which are updates that require immediate attention since we are unable to proceed without your help. (Please speak to your CRM about these notification settings.) IF YOU WISH TO CHANGE THE NOTIFY DURING ANY POINT OF THE PROCESING ON THE CASE YOU CAN CHANGE IT BY CLICKING ON THE GREY BUTTON AND SELECT THE NEW NOTIFY PERSON ON THE CASE
- k. **Underwriter:** Please select the underwriter for this case. Please ensure that it matches the insurance company.
- l. **Mail To:** The “Mail To” will receive notification when the records on the case have been received.
- m. **APS Retrieval:** Click on the grey button to view your options. You must choose one:

APS-Express: All ingoing or outgoing correspondence will be sent via UPS overnight delivery. In addition this case will now handled by our Express handling team.

APS-Regular- All mailing correspondence will be via the regular USPS mail. The case will be called on and status will be updated as often as on a daily basis.

Please note that there is an additional fee for Express cases.

After making your selection, please press ‘**Submit**’ to bring you back to the case order screen.

If you are only ordering an APS, or only ordering an EXAM, make sure that the other service options say NONE. If by default it says “APS REGULAR” then please make sure to click on the grey box and click on “select a blank”

- n. **Special Requests:** A white box should have appeared that says ‘**Spec. Request (APS)**’: In this box, please write any specific information that you would like the

facility to include in the records. (i.e. "Please include the EKG done in November of 2004.") OR if you are only looking for a certain time frame, test, lab or result, please include this information as well. (i.e. Please send the EKG done in June 2006 ONLY). THIS INFORMATION IS AUTOMATICALLY FAXED TO THE DOCTOR'S OFFICE.

- o. Exam (Blood, etc):** Leave Blank when ordering an APS only.
- p. Client:** To enter the client details, press the grey "Client" button. Enter the client's salutation, first name and last name then click on "**Submit**". Continue entering the client details. Please be sure to include a DOB and SSN as this will enable the Doctor's office or Hospital to verify if the client is in fact a patient at their facility. If Parameds.com is contracted to contact the client in situations where a special authorization is required, please make sure to fill in the client's phone number and address information. Please note: The system will not proceed without a DOB or SSN. If you do not have a SSN, please enter an artificial DOB at this time. Press **Submit**.

The screenshot shows a web browser window with the URL 'parameds.com/login'. The page title is 'Please enter the name details:'. The form is organized into three main sections:

- General:** Contains fields for Salutation (dropdown menu with 'Mr.' selected), First Name (text box with 'Sandy'), Last Name (text box with 'Tester'), D.O.B. (mm dd yyyy), and SSN (text box with dashes).
- Address:** Contains fields for Street, City, State (dropdown menu with 'NY' selected), Zip Code, and Country.
- Telephones:** Contains two rows for 'Home:' and 'Work:'. Each row has a text box for the area code (001), a dropdown for the exchange, a text box for the number, a text box for the extension, and a radio button labeled 'Primary'.

At the bottom of the form are 'Submit' and 'Cancel' buttons. Below the form is a link: 'Questions?... NewOrders@parameds.com'.

Figure 5 – Client Details Requested

- q. Doctor:** To enter the records source details, press the grey "Doctor" button. You will be asked to choose whether it is an Individual Name or a Facility Name. If it is a private practice, click on Individual Name. If you are requesting records from a hospital, click on Facility Name.

- i. **Individual Name:** Please complete the doctor's first and last names as well as the state where the facility is located. Press **Submit**. The system is going to search our database for the requested doctor information. If a match was found, please be sure to check the details and verify that the information is correct. If there are multiple matches and you are uncertain as to which Doctor to select, click on "Search an Extended Database". This will increase the search to include the doctor's specialty. If no matches were found you will then press "Continue Adding a New Entry". Here you will be asked to fill in all the necessary information. Please complete as much information as possible and press 'Submit' when done.
- ii. **Facility Name:** Please fill in the state and the facility's name and continue with instructions above.



Figure 6 – Doctor's Information

- r. **Comments:** Any other comments that you feel are necessary to include please enter them here. (i.e. Doctor no longer practices in this facility but records should be there nonetheless). Please do not put in the comments section what records you are requesting. Information on records needed should be entered in the "Special Requests" section (see section n). The comments section should only be used to communicate information to the Parameds.com case worker who is working on the case.
- s. Press **Submit**.

(A CASE HAS NOW BEEN ORDERED and has been added to your case list screen.)

- t. A confirmation screen will appear with the new case number. Please print this page for your records.

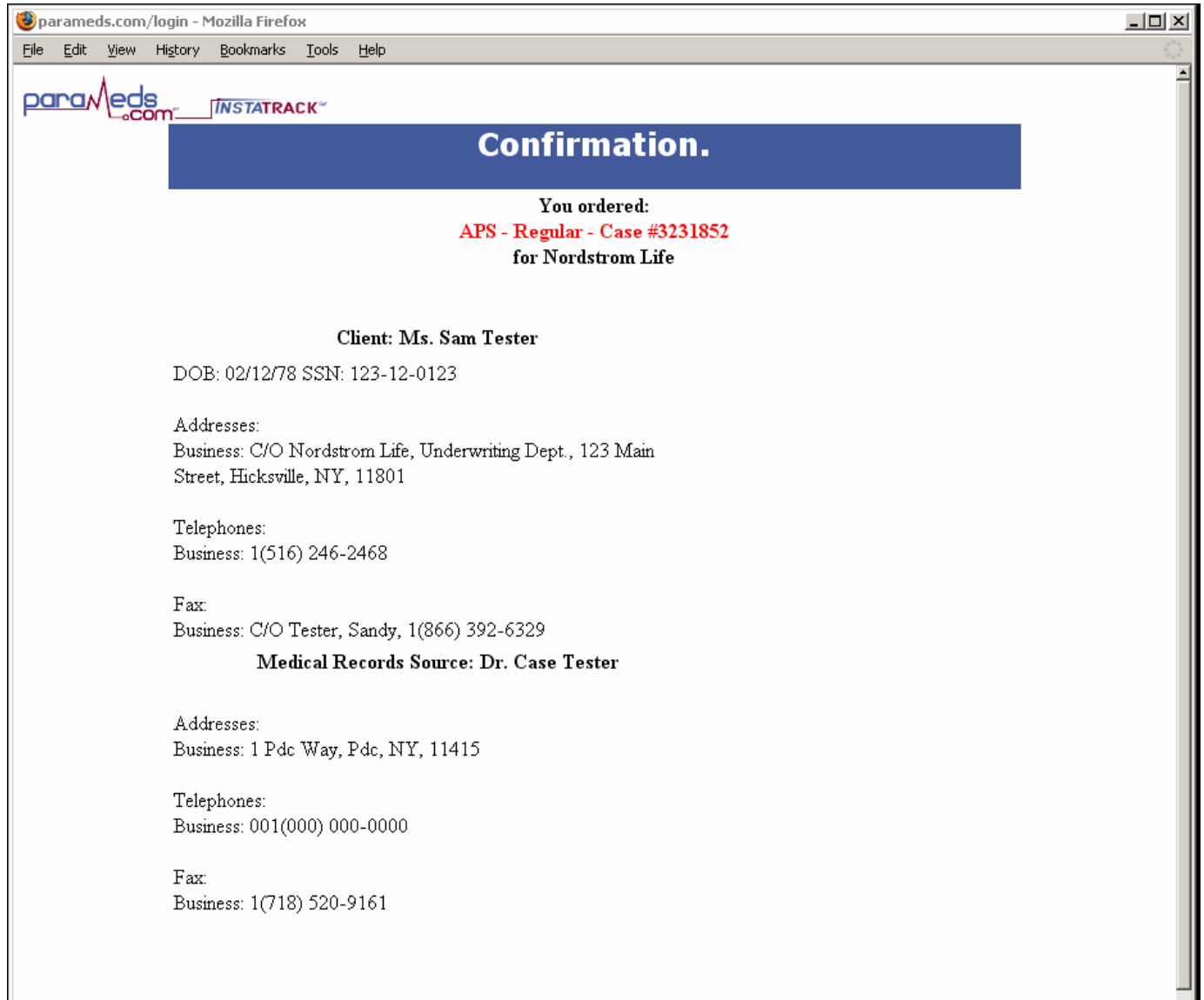


Figure 7 – Confirmation Page

- u. **IMPORTANT!** Please fax in the Client's HIPAA Authorization ASAP to **(866) 206-2313**, or preferably email it to APS@parameds.com. You can also upload the authorization to us directly by clicking on the "Browse" button on the bottom of the confirmation page and locating the authorization in your system. Press "Attach".

On the bottom half of the confirmation page there are 3 options on how to proceed:

Order Another Case: If you'd like to order a new case for a different client and facility, this button will bring you directly to a new "Case Order Form".

Replicate this Case: If you have a case that is for the same client OR a case in which the facility is the same as the previous case ordered, click the replicate button. This will have the client and facility information completed. If the facility information different, click on “Doctor” and proceed as above (see q). If the client details are different, click on ‘client’ and proceed as above (see p).

Done: If you are done ordering, by clicking on the “done” button, you will be directed to your case list screen:

CASE LIST SCREEN

This screen is color coded for easy reference.

Green: APS is attached, and has not yet been viewed.

Red: This case requires your immediate attention.

Purple: This case was cancelled.

Black: This APS retrieval is still in progress, or records have been viewed already.

After a case has been ordered it will remain on your case list screen for 15 days. In order to view a case that is older than 15 days, click on the [Change Search Criteria](#) link which is located on the top of the case list screen.

CHANGE SEARCH CRITERIA:

- a. Select the type of case you are looking for (Pending, Top Priority or Recent.)
- b. Select “done between” or “submitted between” and enter a date range
- c. SEARCH FOR: You have several options to try to find the case you are looking for. You do not need to complete every field in order to pull up the case.

VIEWING THE STATUS OF A CASE

On our site, the case number is the hot link to the details of any retrieval request or any other services you may be ordering presently. By clicking on the case number you will be brought into the details of the specific client’s request (see Figure 8 on the following page).

parameds.com/login - Mozilla Firefox

File Edit View History Bookmarks Tools Help

paraMeds.com INSTATRACK™

Case #2123469 Details:

Ordered by: Ms. Sandy Tester

Agency: Nordstrom Life, Underwriting Dept. Ms. Sandy Tester

Agent: None None

Client: Mr. Dennis Regal **Company:** Nordstrom Life

Policy Type: Life Insurance **Amount:** \$0.00

Service: APS - Regular **Policy #:**

Special Request:

Medical Records Source: Mayo Clinic Rochester

Submitted:	11/21/2007 10:57AM	Request Sent:		APS Received:	
<input type="button" value="Cancelled:"/>				Completed:	

[Download the special HIPPA authorization required by the facility.](#)

Dates	Actions	Post. by
06/23/2008 11:23AM	Please advise. We would like to send the client a special release form to fill out as per the facility. Please advise the clients address so we can send it to him.	SA
06/22/2008	Authorization was not accepted by the facility and requires a new release because - it must state Mayo Clinic and PDC Retrievals.	TL
06/22/2008	We will forward the request to the copy service for processing. They will bill us. The copy service requests that we allow 10-15 business days to process our request.	TL
06/22/2008	We received the authorization.	TL

Questions?... status@parameds.com

Figure 8 – Case Details Screen

CASE DETAILS

From the case details screen you will see the current status reflected in the Dates and Actions section of the webpage. This location is where all status is reflected and will allow you to convey a message to our company. We consider this adding an action. Click on the "Add an Action" button.

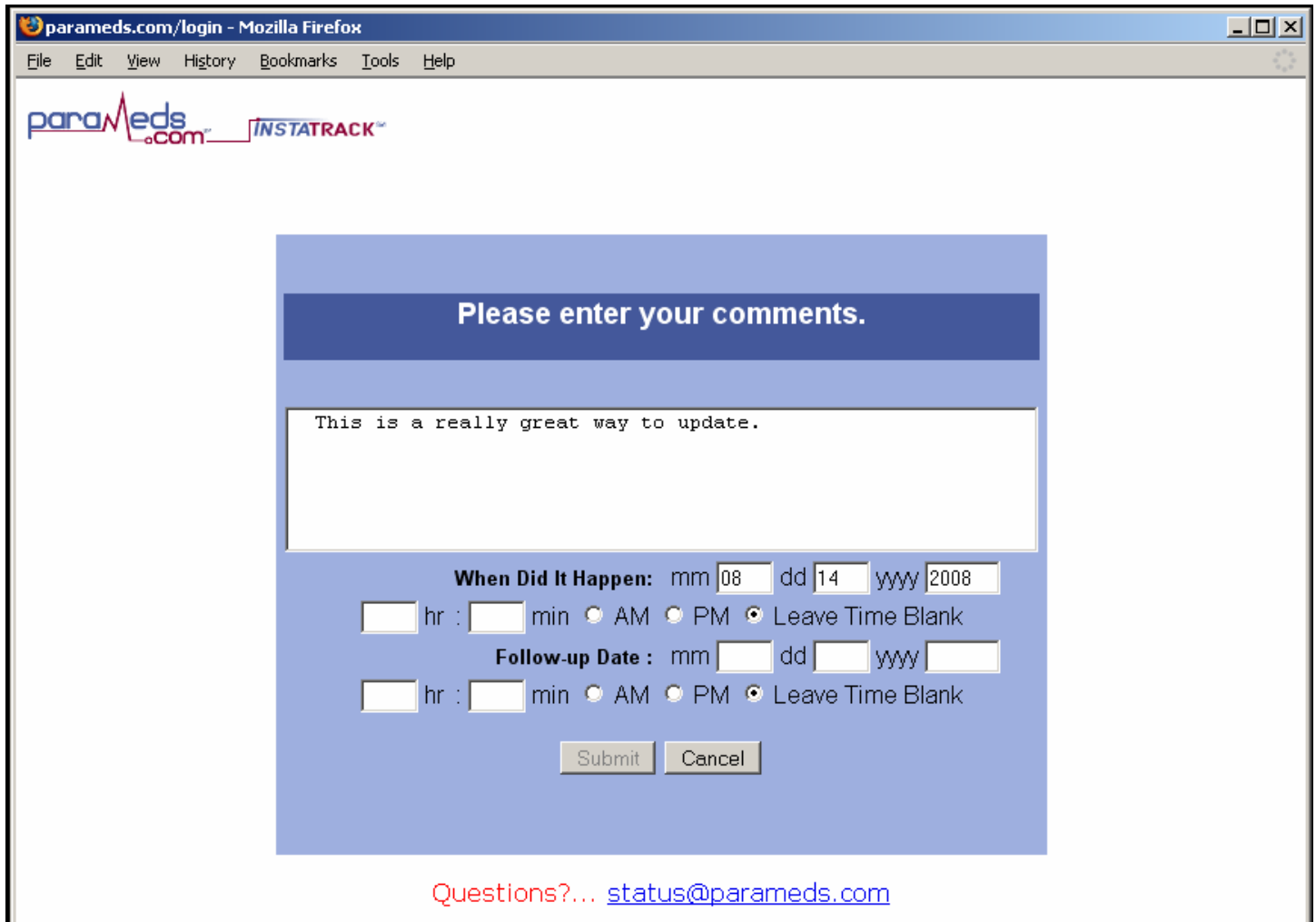


Figure 9 – Adding an Action



The screenshot shows a web browser window with the URL 'parameds.com/login - Mozilla Firefox'. The page title is 'Case #2123469 Details:'. The main content area contains the following information:

- Ordered by:** Ms. Sandy Tester
- Agency:** Nordstrom Life, Underwriting Dept. Ms. Sandy Tester
- Agent:** None None
- Client:** Mr. Dennis Regal **Company:** Nordstrom Life
- Policy Type:** Life Insurance **Amount:** \$0.00
- Service:** APS - Regular **Policy #:**
- Special Request:**

Medical Records Source: Mayo Clinic Rochester

Submitted:	11/21/07 10:57AM	Request Sent:		APS Received:	
<input type="button" value="Cancelled:"/>				Completed:	

[Download the special HIPPA authorization required by the facility.](#)

Dates	Actions	Post. by
08/14/08	This is a really great way to update.	ST

Figure 10 – Updating a Case

When adding an update to our system, it is crucial that you click on Save All Changes at the base of the web site so that the update you added in to the case details screen is saved for all users with access to observe. If you make a mistake in the update you can always hit the cancel button which will not save your comment (see figure 11).

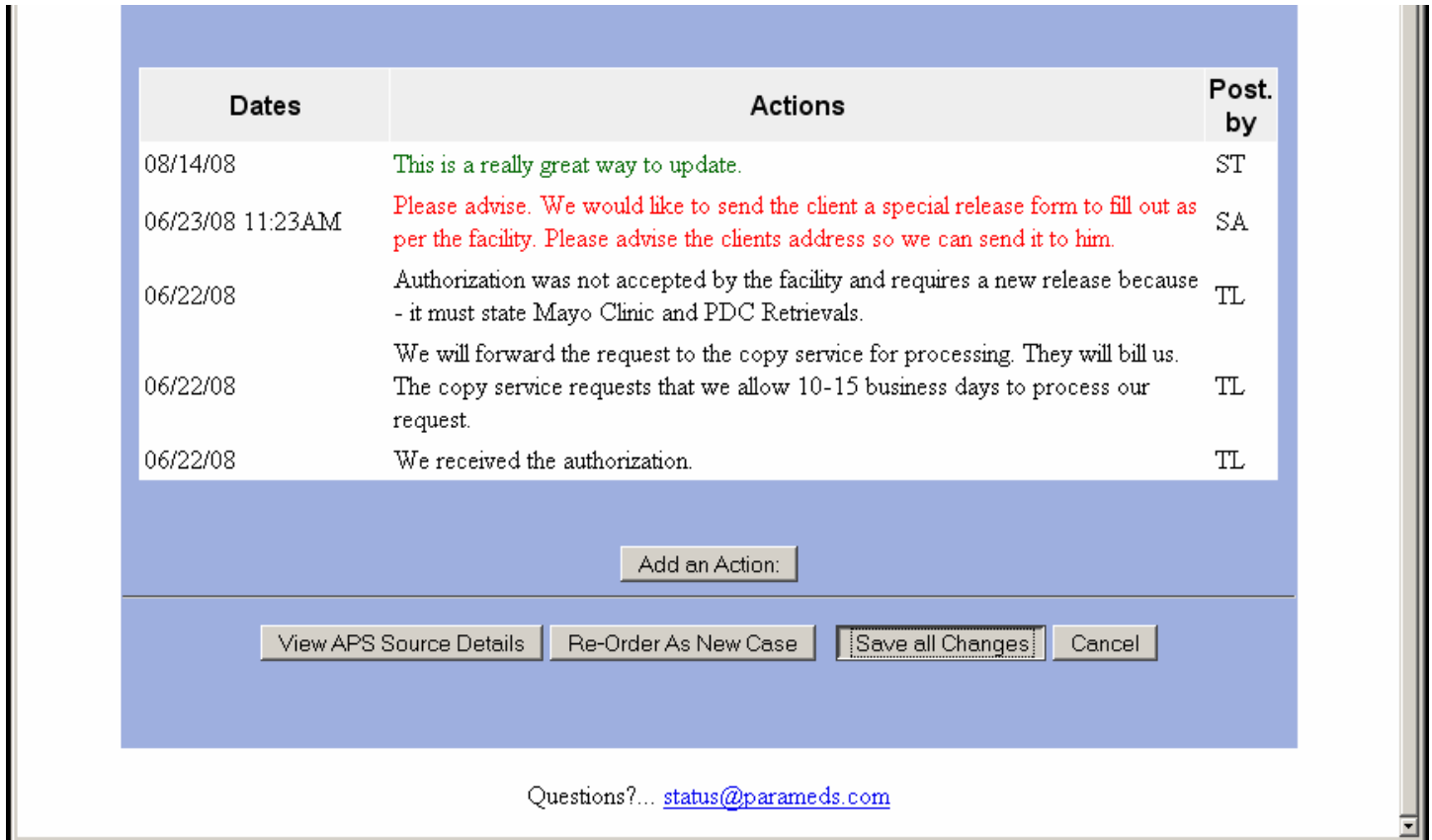


Figure 11 – Save All Changes

VIEWING THE SPECIAL RELEASE NEEDED ON A CASE

When a special release is required from a facility we provide the form to you to expedite the release of the medical records (If you require us to handle special releases for you, you can skip this section).

In the case details or "actions" area you will see a blue text link that states: "Download the special HIPAA authorization required by the facility". You can right click this to save the form to your desktop or by clicking the link it will open the file on your computer in Acrobat (see figure 12).

Case #2123469 Details:

Ordered by: Ms. Sandy Tester

Agency: Nordstrom Life, Underwriting Dept. **Notify:** Ms. Sandy Tester

Agent: None **Underwriter:** None

Client:	Mr. Dennis Regal	Company:	Nordstrom Life
Policy Type:	Life Insurance	Amount:	\$0.00
Service:	APS - Regular	Policy #:	<input type="text"/>
Special Request:			

Medical Records Source: Mayo Clinic Rochester

Submitted:	11/21/07 10:57AM	Request Sent:		APS Received:	
Cancelled:				Completed:	

[Download the special HIPPA authorization required by the facility.](#)

Figure 12 – Click the Link to View the Special Release Needed

Mayo Clinic Number

Name

MAYO CLINIC

TO BE SCANNED AUTHORIZATION

Authorization to Release Information BY Mayo Clinic

Purpose for Release of Information —	Patient Date of Birth
<input type="checkbox"/> Evaluation <input type="checkbox"/> Treatment <input type="checkbox"/> Placement <input checked="" type="checkbox"/> Other <u>insurance application</u>	<input checked="" type="checkbox"/> mm/dd/yyyy
Information Being Requested	
complete medical records for the past 5 years	

I, the undersigned, authorize Mayo Clinic Rochester to disclose any information (all protected health information), or the specific records

CHANGING SERVICE TYPES

If you order more than one type of service from Parameds.com, we keep the cases separate for as a simple managing tool. If you order medical or paramedical examinations, when you log in, the first cases you will be presented with are medical exam cases. If you only order APS cases, those cases will be displayed respectively. However, when you are ordering multiple services we give you a linking feature that allows you to change the cases you are being presented with to whatever service you have ordered. The image below will show you where to click to change to the other services (see figure 13 below).

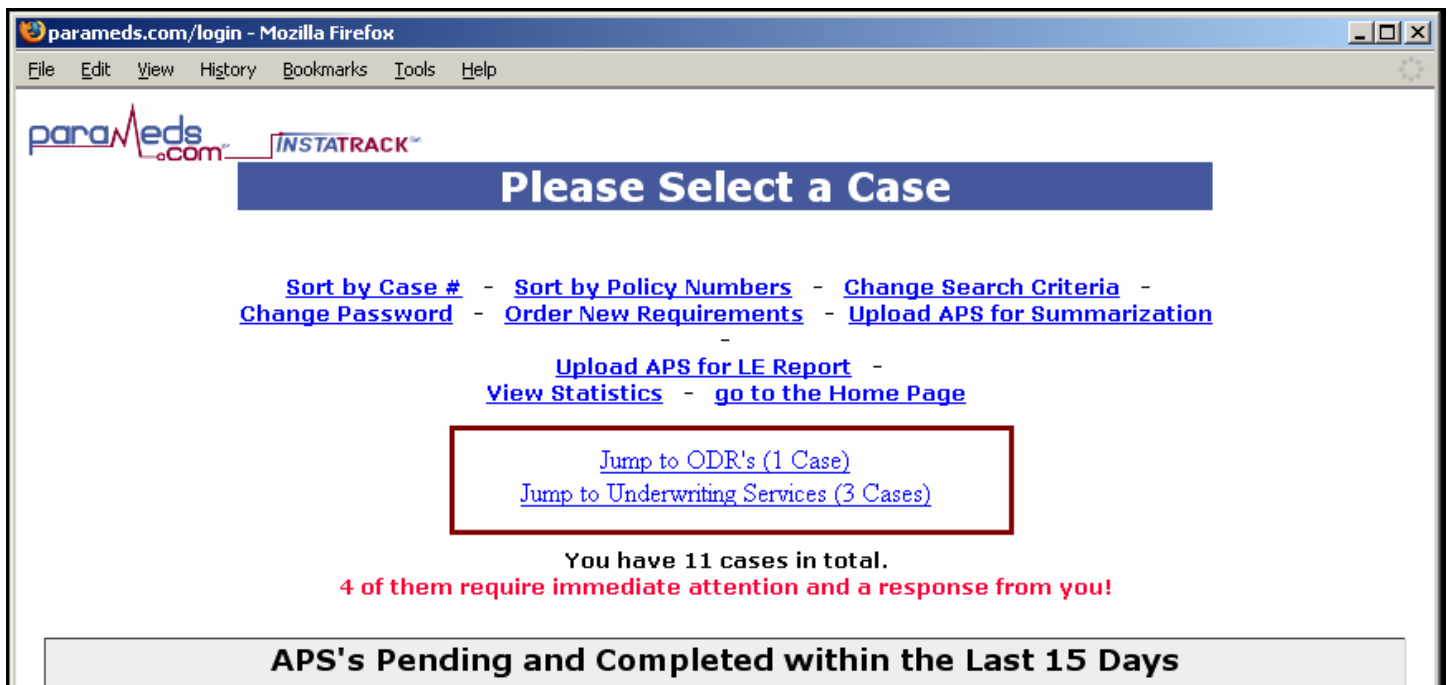


Figure 13 – Jump to the service you have previously ordered

This particular log in has no medical exams ordered and populates the cases for the APS service first. By clicking on Jump to ODRs, you will be brought to the Other Document Retrieval cases, and, by clicking Underwriting Services, you will be presented with all the cases you have ordered for supporting your underwriting department. The next images you will see are details screens from an ODR case and an underwriting case respectively.



REORDERING A NEW CASE

If you have received the APS on a case and would like additional information on the client from the same facility for a variety of reasons such as you received the records on the case and they are incomplete, or if the case has been closed out due to the predetermined closeout date, go to the details of the case and click **Reorder as a new case**. If all the case information remains the same (insurance company, client, Dr., etc), simply add into the special requests field exactly what you are looking for or what information was missing from the original APS. Please specify exactly what additional records or missing records we are looking for. (i.e. Doctor notes a biopsy was done on October of 2007. Please obtain those records, they were not included in the records we received.) Press **Submit**. You will be asked if you are looking for additional records or missing records. Please select the accurate choice. You will then receive a new case number/confirmation.

APPROVING AN EXCESSIVE FEE

If a case is pending due to an excessive fee request, no payment will be issued unless it is approved via the website. To approve an excessive fee, go into the case details and click on **"Approve Fee"** located on the bottom of the screen. This will allow us to release the payment ASAP.

CANCELLING A CASE

If you would like to cancel an active case, you may do so in the case detail screen of that case. Press the grey **'Cancelled'** button which is located under the word **Submitted** in the middle half of the screen. You can add a note as to why the case was cancelled for your own records by completing the pop-up box once you have cancelled the case.

VIEWING THE APS

If you have access to view records that have been received, you can do so by going into the case and clicking on ["View Completed Paperwork Online"](#) which can be found in the 'blue' section of the case details screen.

Other methods of transmitting the APSs to you include:

FTP server – will need to involve our IT personnel as well as yours

Image Packs –records are sent in a secure zip file twice daily

Please speak with your CRM for further details.

EMAILS:

Even if you are on Critical Status only, you will receive emails when a case is marked urgent and we are in need of your assistance. The subject of this email will be *'Waiting for your assistance'*..... Please follow the procedures outlined below when replying to an urgent email.

- 1) Please do NOT respond to the email. Rather, please respond by going into the case and adding an action. This way the retriever will see your reply and will know how to proceed. NOTE: Please remember to ALWAYS "Save all Changes". If, for some reason, you cannot respond via add an action then forward the email to your designated CRM or email: status@parameds.com
- 2) **Excessive Fees:** If you received an email regarding an excessive fee, the email will not tell you the amount that the facility is requesting. In order to view the doctor's fee, you will need to go into the case details. If you are waiting for the underwriter's approval, please update the case stating that, so that we know you have seen the email and we should await further instruction.
- 3) **Closeout dates:** On occasion, a case will reach its closeout date. This means that the case will be cancelled on a certain date due to the prearranged,



Web Guide: Case Manager Tutorial

maximum timeframe that your company made up with Parameds.com. Once that date is approaching we will let you know. Unfortunately, this cannot be prevented. However, you have two options. The first is reopening the case. You can do this by pressing "Reopen as new case" button on the bottom of the screen. The second option is to let the case close. Once the case closes we cease our efforts in obtaining the APS but if/when the records come in, they will be attached to the case and you will be notified.

Please Note that your CRMs are waiting to assist you. Please contact them for any questions or concerns you may have. Thank you for choosing Parameds.com. We look forward to working with you!