

Medical Claims Assessing Logbook and Workplace Assessments

Qualification Name: Medical Claims Assessing _____

Qualification Number: 49356 _____

Learnership LGA Nr: _____

Learner Name and Surname: _____

Learner Contact Number: _____

Learner Email Address: _____

Learner ID Number:

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Mentor Name and Surname: _____

Mentor Contact Number: _____

Mentor Email Address: _____

Roles and Responsibilities

Employer Responsibilities:

- ▶ Select and Appoint Accredited Training Provider that has scope for the qualification
- ▶ Select, inform, induct and sign learnership contract
- ▶ Submit learnership contract to INSETA timorously as stipulated on the agreement
- ▶ Adherence to learnership contract
- ▶ Appoint a internal mentor for every 3 to 5 learners
- ▶ Relevant resources to be made available to assist learner with completion of assignments e.g Internet, library, subject matter expert, ect
- ▶ Learners to be rotated or be exposed to all areas within the organisation relevant to the qualification
- ▶ Submit a motivation to INSETA for approval where rotation is not possible and indicate how exposure is going to be provided
- ▶ Allow learners time off to write the summative assessment and/or remediation's

Mentor Responsibilities:

- ▶ Mentor must meet with the learners on a minimum of bi-monthly basis (or as often as necessary)
- ▶ Mentor to sign logbook on a monthly basis and ensure that it is submitted to the training provider at the 6 months and 12 months interval of the learnership
- ▶ Mentor- learner contract to be signed
- ▶ Oversee and mentor learners w.r.t. workplace assessments
- ▶ Oversee that learners meet the submission due dates of formative assessments
- ▶ Provide guidance in areas needed

Learner Responsibilities:

- ▶ Adhere to all employer/provider/INSETA codes of conduct, policies and ethics
- ▶ Attend and actively participate in facilitation sessions
- ▶ Complete workplace assessments and formative assessments with quality, comprehensive and relevant information
- ▶ Submit all assessments by the agreed submission due date to be permitted to write the summative assessment
- ▶ Complete the logbook on a weekly basis, indicating times spent in the workplace e.g. 8am – 4pm = 8 hours per day
- ▶ Complete the logbook giving a comprehensive outline of functions performed daily e.g. 4 x assessed claims
- ▶ Present the logbook to the mentor at the monthly meeting for sign-off
- ▶ Prepare adequately for the summative assessment

Training Provider Responsibilities:

- ▶ Induction session with mentors at the start of a learnership (Expectations, overview of logbook and workplace assessments, etc)
- ▶ Provide learner with the logbook template
- ▶ Ensure that learners' workplace experience is relevant to the unit standard/qualification being assessed
- ▶ Present logbook and workplace assessment to the INSETA Verifier at the 6 months and 12 months verification visits during the learnership

Assessor Responsibilities:

- ▶ Link functions performed to the Associated Assessment Criteria
- ▶ Record a competency judgment(s)
- ▶ Make recommendations to the learner and mentor on areas that need exposure within the next month
- ▶ Give feedback to the learner and mentor within 10 days of monthly submission
- ▶ Give constructive guidance to the learners on development areas

Stakeholder	Signatures	Date
Employer		
Mentor		
Learner		
Training Provider		
Assessor		

Declaration of authenticity

Declaration by Learners

I (*learner name and surname*) _____, ID Nr _____ hereby declare that the work contained herein was completed by me on my own.

Where assistance or advice was received or where I used resource material from a workbook, policy wording, internet or any other printed sources, this has been acknowledged and referenced. I further declare that I understand that plagiarism is a punishable offence as it constitutes the theft of another's intellectual property rights.

Learner Signature

Date

Declaration by Mentor

I (*mentor name and surname*) _____, ID Nr _____ hereby declare that the learner is being mentored by myself and that the functions listed and the working hours is a true reflection of the learners situation. According to my knowledge I declare that this is his/her own work.

Employer Signature

Date

Logbook

AAC	
1.1	Current events and developments that could impact on Long-term Insurance are analysed and discussed and a personal point of view is offered in the discussion indicating ability to anticipate or predict future trends.
1.2	Knowledge learnt in various Unit Standards and current events as they occur are integrated with a developing understanding of the long-term environment in general, and medical claims assessing in particular, so that knowledge of the industry is applied in authentic situations.
1.3	Important areas of Healthcare Benefits Administration are explained with reference to evolution of Medical Scheme Administration in South Africa, managed care and healthcare cover.
1.4	Information is gathered, analysed, summarised, and interpreted from a range of sources and presented reliably and accurately. Positions taken are motivated and substantiated.
2.1	The basic principles and different forms of individual income tax are explained with reference to an individual's liability and duty to pay tax.
2.2	Basic financial statements are analysed and used to make a personal financial decision.
2.3	Financial risk in own life is analysed and ways to reduce own financial risk are investigated for different types of risk.
3.1	Methods, procedures and techniques of medical claims assessing are explained with reference to specific company policy, legislative requirements and industry practices.
3.2	Information is gathered, analysed, evaluated, interpreted, recorded and presented and decisions are explained within own authority limits or mandate and with due regard for compliance.
3.3	The concept of ethics is explained with reference to an organisation's code of conduct and an individual's personal and property rights.
3.4	Own professional behaviour is assessed against an organisation`s code of conduct and own performance agreement.
3.5	Knowledge of legislation is applied to the assessment of medical claims.
3.6	Risks associated with non-activity or non-compliance that could result in liability are identified within the context of medical claims assessing.
4.1	Methods, procedures and techniques of medical claims assessing are applied in terms of specific company policy, legislative requirements and industry practices.
4.2	The routes medical claims may follow are identified and a claim is assessed and processed electronically according to the rules of a selected Medical Scheme.
4.3	A medical claim is assessed using the correct codes

- ▶ **Note:** Assessor to indicate AAC number next to the functions performed in the logbook template below.
- ▶ Between 40-60% of AACs to be covered in the workplace (depending on the practical component of the qualification)
- ▶ Unit Standard only achieved after the AACs have been assessed

JAN	FEB	MARCH	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
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Month: Tick the month in question

Week 1: ___/___/20___ to ___/___/20___

Department: _____

Functions performed (comprehensive/quantitative)	Hours Worked on this item during the week	Performance Rating by Coach/Mentor (1 = poor to 5 = Excellent)	Alignment of AAC to functions (Assessor)
E. g. Assistance provided on 4 x Medical Claims	4 hours	3	1.3, 3.1, 4.2
Leave/Public Holidays taken			
Learner Comments			Learner Signature

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Department: _____

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Department: _____

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Leave/Public Holidays taken				
Learner Comments			Learner Signature	

Week 4: ___/___/20___ to ___/___/20___

Department: _____

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Leave/Public Holidays taken				
Learner Comments			Learner Signature	

Note: Attach your Job Description under Annexure A

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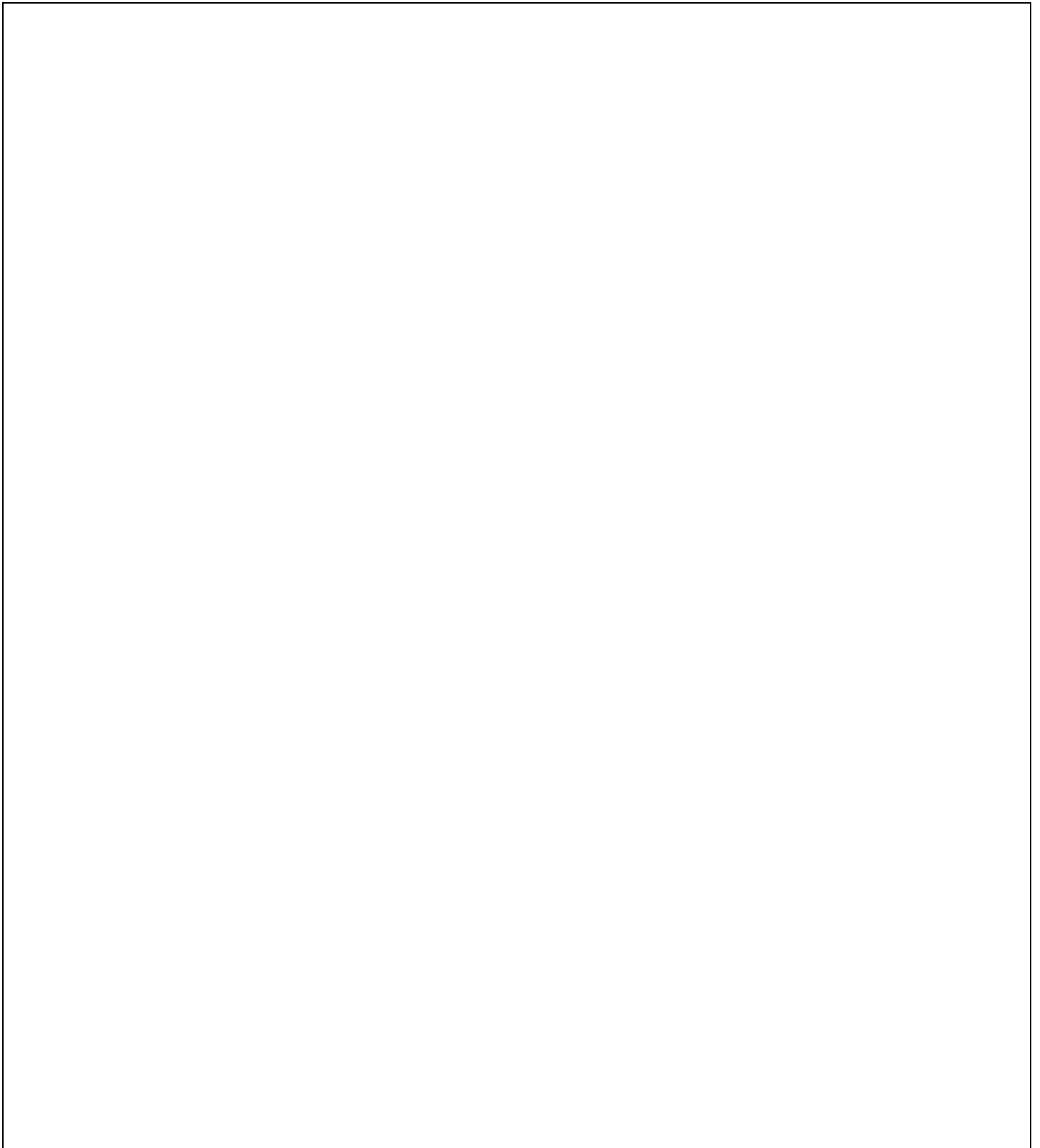
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Coach Signature		Coach Comments					
Assessor Signature		Assessor Comments		C		NYC	
Moderator Signature		Moderator Comments		C		NYC	

Medical Claims Assessing

Annexure A

Job Description/ KPAs



Workplace Assessment

After successful completion of this Learnership the learner will be;

Qualified in: Medical Claims Assessing – ID Nr. 49356

Qualified as: An Medical Claims Assessor

Qualified to:

- Manage personal finances and risk
- Apply the relevant methods, procedures and techniques needed to process a medical claim
- Analyse, interpret and evaluate information within the structure of a Medical Scheme Administrator and in the context of Healthcare Benefits Administration
- Explain the origin and different routes followed by those claims
- Navigating the system
- Understanding the electronic data storage capabilities of the system
- Explaining medical diagnoses

Input: Company specific claims processing and systems training provided.

Exit Level Outcome 1: Identify and solve problems related to Medical Scheme Administration in which responses show that responsible decisions using critical thinking have been made. The learner is required to assess medical claims and apply the rules of medical scheme options to different situations.

Exit Level Outcome 2: Managing personal finances and risk.

Exit Level Outcome 3: Applying knowledge of legislation, ethics, compliance and fraud in Medical Schemes Administration

Exit Level Outcome 4: Applying the methods, procedures and techniques of medical claims assessing.

WORKPLACE ASSESSMENT

Entrance Requirements: Medical claims assessing learner

Pass Rate: 75% on workplace assessment(s)

Notes: Where possible learners to include claims processing stats and quality assurance (error) reports

Section 1

US 118010 – Assess a medical claim (SO 5)

US 117215 – Explain the use of coding in Healthcare Benefits Administration (SO 5)

NB! Each point in the checklist is worth 1 mark

Question 1: Process 5 claims from different providers and complete a checklist for each.

Date:				
Type of Claim:				
A. Navigation of System		Score _____ /15		
No	Observable assessment Criteria	C	NYC	Comments
1	Demonstrate the ability to navigate and effectively use the company specific claims assessing system			
2	Demonstrate the ability to capture member and dependant information accurately			
3	Demonstrate the ability to capture provider information accurately			
4	ICD-10 code captured accurately			
5	Check any exclusions, waiting periods, chronic medications and payment notes prior to data capture			
6	Explain the diagnosis on the claim Diagnosis – Definition			
B. Processing an Account: Demonstrate the ability to:				
1	Apply modifiers correctly			
2	Use the correct company specific DUMMI codes where applicable			
3	Apply rejection and reason codes where applicable			
4	Capture medication quantities accurately			
5	Capture correct date of service			

6	Capture correct patient when processing			
7	Capture the correct tariff codes			
8	Apply and calculate discounts where applicable			
9	Capture 9 digit NAPPI codes accurately			

C. Coding	
1a	What is the ICD 10 code on this claim? _____
1b	Provide a description of this ICD 10 code? _____ _____
1c	Provide a definition / description of this medical condition. _____ _____
1d	List 1 NAPPI / procedure code quoted on this claim. _____
D	List any databases that you may have accessed in order to find additional information which assisted you in capturing this data. _____ _____
Coach Signature: _____ Date: _____	
Learner Signature: _____ Date: _____	
	Comments: _____ _____
Assessor Signature: _____ Date: _____	
	Comments: _____ _____
Moderator Signature: _____ Date: _____	
	Comments: _____ _____

Date:				
Type of Claim:				
A. Navigation of System			Score _____ /15	
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A. Navigation of System			Score _____ /15	
No	Observable assessment Criteria	C	NYC	Comments
1	Demonstrate the ability to navigate and effectively use the company specific claims assessing system			
2	Demonstrate the ability to capture member and dependant information accurately			
3	Demonstrate the ability to capture provider information accurately			
4	ICD-10 code captured accurately			
5	Check any exclusions, waiting periods, chronic medications and payment notes prior to data capture			
6	Explain the diagnosis on the claim Diagnosis – Definition			
B. Processing an Account: Demonstrate the ability to:				
1	Apply modifiers correctly			
2	Use the correct company specific DUMMI codes where applicable			
3	Apply rejection and reason codes where applicable			
4	Capture medication quantities accurately			
5	Capture correct date of service			
6	Capture correct patient when processing			
7	Capture correct tariff codes			
8	Apply and calculate discounts where applicable			
9	Capture 9 digit NAPPI codes accurately			

C.	Coding
1a	What is the ICD 10 code on this claim? _____
1b	Provide a description of this ICD 10 code? _____ _____
1c	Provide a definition / description of this medical condition. _____ _____
1d	List 1 NAPPI / procedure code quoted on this claim. _____
D	List any databases that you may have accessed in order to find additional information which assisted you in capturing this data. _____ _____
Coach Signature: _____ Date: _____	
Learner Signature: _____ Date: _____	
	Comments: _____ _____
Assessor Signature: _____ Date: _____	
	Comments: _____ _____
Moderator Signature: _____ Date: _____	
	Comments: _____ _____

Section 2

2.1. Complete two workflow diagrams for two different types of claims which depict the flow of two different types of medical claims from receipt by a medical administrator to final payment by a claims assessor. (10)

- ✓ Simple claim – GP, ambulance, pharmacy claims, or
- ✓ Complex claim – Managed care or disease management claim e.g. oncology, or In-hospital claim

2.1.a

2.2.b

Score ____ /10

C

NYC

4:	In your role as an assessor explain how you would comply with the company's code of conduct with regards to performance and company's property rights.	(5)
	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	
Score : ____/5		C
		NYC

5:	Explain the concept of garbage in garbage out and give an example of this in your workplace.	(2)
	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	
Score : ____/2		C
		NYC

Grand Total: _____/100	C		NYC	
Assessor Signature:	Date:			
Moderator Signature:	Date:			