Ministry of Health and Family Welfare

HOSPITAL USER MANUAL

For

Transaction Management System
**ABBREVIATION:**

<table>
<thead>
<tr>
<th>TERMS</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>PMAM/ AM</td>
<td>Pradhan Mantri Arogya Mitra / Arogya Mitra</td>
</tr>
<tr>
<td>MEDCO</td>
<td>Medical Coordinator</td>
</tr>
<tr>
<td>PEX</td>
<td>Pre-Authorization Executive</td>
</tr>
<tr>
<td>PPD</td>
<td>Pre-Authorization Panel Doctor</td>
</tr>
<tr>
<td>CEX</td>
<td>Claim Executive</td>
</tr>
<tr>
<td>CPD</td>
<td>Claim Panel Doctor</td>
</tr>
<tr>
<td>AO</td>
<td>Account Officer</td>
</tr>
<tr>
<td>SHA</td>
<td>State Health Agency</td>
</tr>
</tbody>
</table>
TMS Workflow explains all roles and responsibility involved in this process as mentioned below.

1. Beneficiary Approaches Empanelled Hospital
2. Beneficiary Registration in Hospital by PMAM / Medco
3. Preliminary diagnosis
4. Categorize Patient as OP / IP
   - Out Patient
   - In Patient
5. Case marked as OP
6. Preauth Initiation by Medco / PMAM
7. Case Auto approved for listed procedures
8. Case requiring Manual approval from PPD
   - Rejected
   - Approved
   - Pending for clarification
9. Treatment Provided and Case Updated by PMAM / Medco
10. Discharge Update by PMAM / Medco
11. Claim Initiation by PMAM / Medco
12. Claim Verified by Claim Executive
13. Claim Processing by CPD Trust / Insurance
   - Rejected
   - Approved
   - Pending for clarification
14. Accounts Officer Approval
15. SHA Approval (if mandated)
16. Claim Settled with Hospital
17. Patient discharged
Preauthorization Workflow:

Preauthorization Workflow explains all roles and responsibility involved in this process as mentioned below.

* Hospital Co-ordinator: It could be MEDCO and/or PMAM.
### Menus and Sub Menus:

Below are the Menus and Sub Menus involved in TMS Application.

<table>
<thead>
<tr>
<th>S.No</th>
<th>Menus</th>
<th>Sub-Menus</th>
</tr>
</thead>
</table>
| 1    | Patient | Register Patient  
|      |         | Register Patient View  
|      |         | Telephonic Registered patients  
|      |         | Out patient Registered cases |
| 2    | Case Search | NA |
| 3    | Pre-Auth | Pre auth Initiation  
|      |         | Pre auth Updation  
|      |         | Cases for Surgery Update  
|      |         | Cases for discharge Update  
|      |         | Cancel Pre auth |
| 4    | Claims | Claims Initiation  
|      |         | Claims Updation |

### Case Status:

Below are the Case status for all cases involved in TMS Application.

<table>
<thead>
<tr>
<th>S.No</th>
<th>Case</th>
<th>Current</th>
<th>Previous</th>
<th>Next</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Out patient</td>
<td>OP case Registered</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>2</td>
<td>In patient</td>
<td>IP case registered</td>
<td>NA</td>
<td>MEDCO Pre auth initiated</td>
</tr>
<tr>
<td>3</td>
<td>Pre auth initiation</td>
<td>MEDCO Pre auth initiated</td>
<td>IP case registered</td>
<td>PPD Approve/PPD rejected/PPD pending</td>
</tr>
<tr>
<td>4</td>
<td>Pre auth Update</td>
<td>PPD Insurer/Trust/Multi Approve</td>
<td>MEDCO Pre auth initiated</td>
<td>Surgery date updated by MEDCO</td>
</tr>
<tr>
<td>5</td>
<td>Pre auth Update</td>
<td>PPD Insurer/Trust/Multi Pending</td>
<td>MEDCO Pre auth initiated</td>
<td>MEDCO Pending Updated</td>
</tr>
<tr>
<td>6</td>
<td>MEDCO Update</td>
<td>MEDCO Pending Updated</td>
<td>PPD Insurer/Trust/Multi Pending</td>
<td>PPD Insurer/Trust/Multi Pending Approved</td>
</tr>
<tr>
<td>7</td>
<td>Pre auth Update</td>
<td>PPD Insurer/Trust/Multi Pending Approved</td>
<td>MEDCO Pending Updated</td>
<td>Surgery date updated by MEDCO</td>
</tr>
<tr>
<td>8</td>
<td>Pre auth Update</td>
<td>PPD Insurer/Trust/Multi Reject</td>
<td>MEDCO Pre auth initiated</td>
<td>NA</td>
</tr>
<tr>
<td>9</td>
<td>NA</td>
<td>Procedure Auto Approved</td>
<td>MEDCO Pre auth initiated</td>
<td>Surgery date updated by MEDCO</td>
</tr>
<tr>
<td>10</td>
<td>Cancel</td>
<td>Pre auth Cancelled</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>11</td>
<td>Cases for Surgery update</td>
<td>Surgery date updated by MEDCO</td>
<td>PPD Approve</td>
<td>Discharge date updated by MEDCO</td>
</tr>
<tr>
<td>12</td>
<td>Cases for Discharge update</td>
<td>Discharge Date updated by MEDCO</td>
<td>Surgery date updated by MEDCO</td>
<td>Claim initiated by MEDCO</td>
</tr>
<tr>
<td>13</td>
<td>Claim initiation</td>
<td>Claim initiated By MEDCO</td>
<td>Discharge Date updated by MEDCO</td>
<td>Claim forwarded By CEX</td>
</tr>
<tr>
<td>14</td>
<td>Claim Updation</td>
<td>Claim forwarded by CEX</td>
<td>Claim Initiated by MEDCO</td>
<td>Claim approved by Claim Panel doctor</td>
</tr>
<tr>
<td>15</td>
<td>Claim Updation</td>
<td>Claim Insurer/Trust/Multi approved by Claim Panel doctor</td>
<td>Claim forwarded By CEX</td>
<td>NA</td>
</tr>
<tr>
<td>16</td>
<td>Claim Updation</td>
<td>Claim kept Pending by CPD</td>
<td>Claim forwarded By CEX</td>
<td>Claim Pending Updated by MEDCO to CPD</td>
</tr>
<tr>
<td>17</td>
<td>MEDCO Update</td>
<td>Claim Pending Updated by MEDCO to CPD</td>
<td>Claim kept Pending by CPD</td>
<td>Claim Pending Approved by CPD</td>
</tr>
<tr>
<td>18</td>
<td>Claim Updation</td>
<td>Claim Pending Approved by CPD</td>
<td>Claim Pending Updated by MEDCO to CPD</td>
<td>NA</td>
</tr>
<tr>
<td>19</td>
<td>Claim Updation</td>
<td>CPD Insurer/Trust/Multi Reject</td>
<td>Claim forwarded By CEX</td>
<td>Claim forwarded to Accounts Officer</td>
</tr>
<tr>
<td>20</td>
<td>Claim Updation</td>
<td>Claim forwarded to Accounts officer</td>
<td>CPD Insurer/Trust/Multi Reject</td>
<td>Claim forwarded to SHA</td>
</tr>
<tr>
<td>21</td>
<td>Claim Updation</td>
<td>Claim forwarded to SHA</td>
<td>Claim forwarded to Accounts Officer</td>
<td>NA</td>
</tr>
</tbody>
</table>
Patient Registration:

Any patient wants to take the services through this scheme he should be registered either through Direct or Telephonic Registration (In case of Emergency).

1. Direct Registration
2. Telephonic Registration

Direct Registration:
Arogya Mitra /Medco (A person appointed by the insurance who is present at the hospital for registering Pradhan Mantri Jan Arogya Yojana (PM-JAY) patients into the scheme) for entering the Patient details, if patient visits the hospital directly.

Telephonic Registration:
In case of an emergency, when a surgery needs to be done immediately (emergency cases) telephonic approval is taken from concerned Approvers. Later the Arogya Mitra will register the case into our system.

1) Direct Registration:
Arogya Mitra / Medco should be able to register the Patient by entering the Patient details, if patient visits the hospital directly.

Login to the operations worklist by giving Arogya Mitra /Medco credentials and click on Login button to initiate cases for the registration of the patient as shown in the screen shot.
Dashboard appears first which has all the statistical data while Arogya Mitra logins.

### Hospital Statistics

<table>
<thead>
<tr>
<th></th>
<th>Overall</th>
<th>Last 24 Hrs</th>
<th>Overall</th>
<th>Last 24 Hrs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patients Registered</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Out Patients</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In Patients</td>
<td>5</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preauthorizations</td>
<td>1</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amount Preauthorized</td>
<td>₹36500</td>
<td>₹0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Surgeries/Therapies Done</td>
<td></td>
<td></td>
<td>₹0</td>
<td>₹0</td>
</tr>
<tr>
<td>Surgeries/Therapies Done Amount</td>
<td></td>
<td></td>
<td>₹265500</td>
<td>₹0</td>
</tr>
<tr>
<td>Death Cases</td>
<td></td>
<td></td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Claim Paid Amount</td>
<td></td>
<td></td>
<td></td>
<td>₹0</td>
</tr>
</tbody>
</table>

### Preauthorizations

<table>
<thead>
<tr>
<th>Pending At</th>
<th>&lt; 12 hours</th>
<th>&gt; 12 hours</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Count</td>
<td>Amount (in Rs.)</td>
</tr>
<tr>
<td>TRUST</td>
<td>0</td>
<td>₹0</td>
</tr>
<tr>
<td>HOSPITAL</td>
<td>0</td>
<td>₹0</td>
</tr>
</tbody>
</table>
Retrieve the beneficiary details by giving State, id type (AB PM-JAY ID, Mobile Number, Aadhar card, Ration card, and any other card), id number and New born baby which is a non-mandatory field as shown in the screen shot.
Click on Proceed button by verifying the beneficiary details (In case of family ID cards the following page appears in order to select one among them) as shown in the screen shot.
Click on Register button by providing the patient details and Action Type as Register as shown in the screen shot.

Click on OK button for registering the patient as shown in the screen shot.
Unique patient id will be generated on clicking OK button after registering the patient in PM-JAY.

In registered patient view, registered patients will be displayed as shown in the screen shot.
Below page will be displayed by clicking patient id as shown in the screen shot. Arogya Mitra /Medco can also use print button to get the print of the following details.

<table>
<thead>
<tr>
<th>Name</th>
<th>Gender</th>
<th>Date of Birth</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Female</td>
<td>25-02-1980</td>
<td></td>
</tr>
</tbody>
</table>

**Address**

<table>
<thead>
<tr>
<th>House No.</th>
<th>Street</th>
<th>City/Town/Village</th>
<th>Pin Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>404</td>
<td>Press</td>
<td>Ameerpet</td>
<td>500016</td>
</tr>
</tbody>
</table>

**Communication Address**

<table>
<thead>
<tr>
<th>House No.</th>
<th>Street</th>
<th>City/Town/Village</th>
<th>Pin Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>404</td>
<td>Press</td>
<td>Ameerpet</td>
<td>500016</td>
</tr>
</tbody>
</table>

**Case Details**

Registered Hospital:

CONFIDENTIAL HOSPITALS

Date of birth of patient

31/07/1980 8:34:43 AM
2) **Telephonic Registration:**

In case of an emergency, when a surgery needs to be done immediately (*emergency cases*) Pre-Auth Executive should be able to enter the Patient details through telephone. Later the Arogya Mitra will register the case to PM-JAY.

Login to the operations worklist by giving Pre-auth Executive credentials and click on Login button to initiate cases for the registration of the patient through telephone as shown in the screen shot.
Pre-Auth Executive should be able to submit details by providing the patient details through telephone as shown in the screen shot.
Click on OK button for registering the patient as shown in the screen shot.

Unique Telephonic id will be generated on clicking OK button after submitting the patient details through Telephone as shown in the screen shot.
In Telephonic registered patient view, registered patients through telephone will be displayed as shown in the screenshot.

Then it will go to Arogya Mitra’s pool and he will register the corresponding patient which will be like direct registration process mentioned earlier.

**Initial Diagnosis and Admission:**

Initial Diagnosis and Admission explains how an Inpatient and Outpatient Registration will be done. If any patient wants to take the services through this scheme he should register either as Inpatient or Outpatient through MEDCO (network hospital doctor).

1. **In-Patient**
2. **Out-Patient**

**In-Patient Registration:**

Provisional diagnosis will be done at the Network Hospitals. Patient will be recommended for certain tests and based on the reports MEDCO (network hospital doctor) will convert the patient as **Inpatient** (patient will be admitted in the hospital and surgery needs to be done).

**Out-Patient Registration:**

MEDCO (network hospital doctor) will convert the patient as **Outpatient** (If no Surgery is required), If no further treatment is required based on the examination of the reports with respect to certain tests after completion of provisional diagnosis.
1) **In-Patient Registration:**

Medco should be able to register the Patient as In-Patient by diagnosing the patient.

Login to the operations worklist by giving Medco credentials and click on Login button to initiate in-patient cases as shown in the screen shot.

Retrieve the registered patients by clicking the Registered Patient View as shown in the screen shot.
Click on IP for registering In-Patient Registration as shown below.
Click on IP button and submit the Diagnosis, Therapy details and Action Type as Submit IP as shown in the screen shot.
Click on OK button for submitting IP patient details as shown in the screen shot.

Unique Case id will be generated on clicking OK button after registering the In-Patient as shown in the screen shot.
2) **Out-Patient Registration:**

Medco should be able to register the Patient as Out-Patient if no further treatment is required for patient.

Hit the URL: [http://stage.ehf.telangana.gov.in/TMS](http://stage.ehf.telangana.gov.in/TMS)

Login to the operations worklist by giving Medco credentials and click on Login button to initiate out-patient cases as shown in the screen shot.

Retrieve the registered patients by clicking the Registered Patient View as shown in the screen shot.
Click on OP button and Submit Action Type as Submit OP for the out patients as shown in the screen shot.

Click on OK button for submitting OP patient details as shown in the screen shot.
Unique Case id will be generated on clicking OK button after registering the Out-Patient as shown in the screen shot.

**Preauthorization:**

3) **Preauthorization Process Initiated by MEDCO**

Medco should be able to initiate the Preauthorization by submit the inpatient details.

Login to the operations worklist by giving Medco credentials for initiating the Preauthorization process and retrieve the In-Patient registered patients by clicking the Pre-Auth Initiation as shown in the screen shot.

Click on Submit button by providing the Plan of Treatment, Comorbid Conditions, Admission Details and Pre-Auth Attachments as shown in the screen shot.
Submit all mandatory attachments for Pre-Auth tab as shown in the screen shot.

After initiating the Pre-Authorization, message will be generated as shown in the screen shot.
7) **Preauthorization Updation by MEDCO**

Medco should be able to update the required information to PPD for the cases kept for pending by PPD as shown below.
Click on OK button for updating the required information as shown in the screen shot.

After Clicking OK, message will be generated as shown in the screen shot.
8) **Preauthorization Process Verified by MITRA**

**Note**: For some states, if they are having Arogya Mitra, then it will go to Arogya Mitra pool. For the other states, after Pre-auth initiation, request will go to Panel doctor directly.

Arogya Mitra should be able to verify the Preauthorization process initiated by Medco as shown in the screen shot.

Unique Claim number will be generated after forwarding the case by the Arogya Mitra as shown in the screen shot.
**Patient Management and Discharge:**

Patient Management is giving treatment to the patient who want to avail hospital services, he has to be admit in the hospital either for the Surgery or for Medical. After completion of the treatment, process will be ended by discharging him.

(i) Patient Management  
(ii) Patient Discharge

**Patient Management:**

After Preauthorization, MEDCO (Network Hospital Doctor) verifies whether the beneficiary can go for Surgery or Therapy. Based on the procedure, he has to submit by providing treating doctor details, Daily Clinical Notes like Medicines, B.P and some attachments like post-surgery photos. After this Case Status will be changed as Pre-Auth to Surgery update.

**Patient Discharge:**

After Surgery update, MEDCO (Network Hospital Doctor) will provide Discharge Summary and attachments like Post Surgery/Therapy Special Investigation, patient photo, Treating doctor and Arogya Mitra photo’s, Satisfaction Letter and Transport Acknowledgement Letter (As Transport facility will be provided freely) at the time of Discharge. Hospital has to treat freely up to 10 days after discharge, if any complications came for the patient.

9) **Patient Management**

Medco should be able to view Pre-Authorization Approved cases in the ‘Cases for Surgery Updation’ tab as shown in the screen shot.

Click on ‘submit Surgery Details’ button by providing the details like Surgeon Details, Anaesthetist Details, Assistant Surgeon Details, Procedure Details, Surgery Date and Mandatory Attachments in Surgery/Discharge Update as shown in the screen shot.
Click on OK button for updating the surgery details as shown in the screen shot.

‘Treatment/Surgery Updated’ message will be generated on clicking OK button as shown in the screen shot.
10) Patient Discharge

Medco should be able to view Surgery Updated cases in the ‘Cases for Discharge Updation’ tab as shown in the screen shot.
Click on ‘Discharge’ by providing the details like Surgeon Details, Anaesthetist Details, Assistant Surgeon Details, Procedure Details, Surgery Date and Mandatory Attachments in Surgery/Discharge tab as shown in the screen shot.
Attachments are given in the attachments tab as shown below

Click on OK button for submitting the discharge details as shown in the screen shot.
MEDCO will be able to submit all the details in the surgery/discharge tab as shown below.

After submitting the discharge details the following page appears.
11) **Claim initiated by MEDCO**

Medco should be able to view Discharge updated cases in Claim Initiation tab as shown in the screenshot.

Click on Submit button by submitting the Claim Details and mandatory Attachments in the Claim tab as shown in the screenshot.
After initiating Claim, need to click on ‘OK’ button as shown in the screen shot.

After Clicking OK, message will be generated as shown in the screen shot.
12) Claim Updation by MEDCO

Medco should be able to update the required information to CPD for the cases kept for pending by CPD as shown below.
Click on OK button for updating the required information as shown in the screen shot.

After Clicking OK, message will be generated as shown in the screen shot.