

The Letters and Attachments screen is separated into three sections:

**Attachments**

Drag and Drop Files Here to Attach Them

Use to filter by any field

Click date stamp to view attachment

Click any header to re-sort the list (alphabetically or by date)

Date	Status	Author	Type	Title
04/04/2019 12:17:22 PM	Complete		Attachment	
03/21/2019 4:01:42 PM	Complete		Attachment	
03/04/2019 4:47:13 PM	Complete		Attachment	

**Attachments** are documents created outside CaseTrakker and uploaded electronically to the member's record. The document **Title** is created using standard file names, and there is a **Filter** icon (🔍) available to narrow your search. You can also click on any column header to change the sort of the list: by default the most recent items are listed first.

**Naming Convention:**

To ensure member documents are saved in an organized manner, the following naming convention has been adopted (see *Document Naming Convention list for details*):

**Last.First.DateofBirth.DocumentType.DateofReceipt**



Due to reporting constraints, all COVID-19 member documentation must begin with **COVID-19**, then continue with the standard naming convention.

**Letters**

Click date stamp to view letter

Use to filter by any field

Click any header to re-sort the list (alphabetically or by date)

Date	Status	Author	Type	Title
02/21/2019 1:38:07 PM	Sent		Medication Reconciliation Form	Medication Reconciliation Form
12/10/2018 10:22:09 AM	Signed and Returned by Member		IPC	IPC
12/10/2018 10:21:54 AM	Sent			IPC Cover Letter
12/10/2018 9:11:54 AM	Sent			FI Referral Letter

Standard **Letters** can be created in CaseTrakker using available templates. Again, there is a **Filter** icon (🔍) available to narrow your search. You can also click on any column header to change the sort of the list: by default, the most recent items are listed first.

**Letters** are created in CaseTrakker by clicking ⋮ and + Create New at the top of the screen. These templates pull relevant information from the member file, including the member's address, authorizations, etc.

**Letter Templates** (corresponds to Title in the Letters list; Not all templates may currently be in use):

- ADH (*Adult Day Health*) Referral Form
- AFC (*Adult Foster Care*) Referral Form
- AOR (*Appointment of Representative*) Form
- Attachment\*

- Authorization Letter
- Disease Management Letter
- DRG (*Case Rate/Negotiated Rate*) LOID (*Lack of Information Denial*)
- Exhaustion of Benefit Duals
- Expedited OD (*Organization Determination*) Extension Letter
- FI (*Fiscal Intermediary*) Referral Letter
- GAFC (*Group Adult Foster Care*) Referral Form
- H&P (*History & Physical*) Attachment\*
- IPC (*Individualized Plan of Care*)
- IPC (*Individualized Plan of Care*) Cover Letter
- MDS (*Minimum Data Set*) Assessment\*
- Medication Reconciliation Form
- NDMCP (*Notice of Denial of Medical Coverage/Payment*)
- NDMCP (*Notice of Denial of Medical Coverage/Payment*) Medicaid Only
- Notice of Denial of Medical Coverage (Duals) – Medical Item or Service
- Notice of Denial of Medical Coverage (Duals) – Part B drug
- Notice of Denial of Medical Coverage (Medi) – Medical Item or Service
- Notice of Denial of Medical Coverage (Medi) – Part B drug
- NP (*Nurse Practitioner*) Care Model Letter
- Original SCO Auth Letter
- PCA (*Personal Care Attendant*) Referral Form
- PCP CHA (*Comprehensive Health Assessment*) Cover Letter
- PCP PAD (*Peripheral Artery Disease*) Letter
- Per Diem LOID (*Lack of Information Denial*)
- Precert AOR (*Appointment of Representative*) Letter
- Refused Assessment 30 Day Letter
- Refused Assessment 90 Day Letter
- RFMI (*Request For More Information*) Letter
- Safe Disposal of Medications
- SCO Dismissal Letter AOR (*Appointment of Representative*) – Duals
- SCO Dismissal Letter AOR (*Appointment of Representative*) – Medi
- SCO Duals Part C Withdrawal Letter
- SCO Duals Untimely OD (*Organization Determination*) Letter
- SCO Medi Part C Withdrawal Letter
- SCO Medi Untimely OD (*Organization Determination*) Letter
- SCO NP (*Nurse Practitioner*) Care Model Letter
- SCO OP (*Outpatient*) Cover Sheet Covered with No PA (*Prior Authorization*) Required Fax – Duals
- SCO OP (*Outpatient*) Cover Sheet Covered with No PA (*Prior Authorization*) Required Fax – Medi
- Standard OD (*Organization Determination*) Extension Letter
- THP SCO Fast Complaint Letter – Declined to Expedite
- THP SCO Fast Complaint Letter – Extension
- Unable to Reach Letter
- Welcome Document

\* While Attachment, H&P Attachment and MDS Assessment are listed in the Documents menu with the letter templates, these selections allow you to attach electronic documents to the member's file.

Letter Status options:

- Reviewing
- Ready to Send
- Sent
- Signed and Returned by Member
- VOID – for mistaken entries

The screenshot shows the 'H&P Attachments' section. At the top, a callout box says 'Click any header to re-sort the list (alphabetically or by date)'. Below this is a dashed box containing the text 'Drag and Drop H&P Files Here'. Below the dashed box is a table with the following structure:

Date	Status	Author	Type	Title
05/14/2021 10:19:11 AM	Complete	Author is the user who uploaded the H&P	H and P Document Type	

Callouts include: 'Click date stamp to view H&P' pointing to the date cell; 'Use to filter by any field' pointing to a filter icon in the title column; and 'Author is the user who uploaded the H&P' pointing to the author cell.

**H&P Attachments** is where you will find the most current History & Physical, or H&P – a report from a member’s treating provider on their medical history and current status at the time of a visit. PCPs should share an H&P for the member at least annually, and the member’s Care Coordinator can be tasked to request one, if needed.

The **Date** is populated with the upload date of the document, not the date of the H&P. Likewise, **Author** is populated with the name of the staff member uploading the document, not the provider who saw the member.