



User Guide

for

AllMed Clients

Version 2.0

November 2009



PeerPoint Workflow

User Guide for AllMed Clients

Documentation Release 2.0

November 2009

© 2009 AllMed Healthcare Management, Inc.
Proprietary and confidential information, not to be disclosed to any third party without the express, written consent of AllMed Healthcare Management, Inc. For further information on this subject, please refer to the PeerPoint User License.

Contents

1. Getting Started	1
1.1 The PeerPoint® Workflow Application	2
1.2 Opening PeerPoint Workflow	3
1.3 Using the Blue Buttons for Selecting Cases to View.....	4
1.3.1 Inbox.....	6
1.3.2 Pending Review	6
1.3.3 Archive	6
1.4 Using the Actions in the Yellow Box.....	8
1.5 Summary.....	9
2. Submitting a Review Request	10
2.1 Submitting a New Request.....	11
2.1.1 Entering Patient Information	12
2.1.2 Entering Request Information.....	13
2.1.3 Entering Questions	20
2.1.4 Uploading Electronic Case Materials.....	24
2.1.5 Identifying Artifacts	28
2.1.6 Specifying Delivery Method.....	31
2.1.7 Submitting the Completed Request.....	33
2.2 Creating a Pre-submittal Request	36
3. Viewing and Editing Cases.....	37
3.1 Viewing and Editing Case Review Requests	38
3.1.1 Options Buttons at the Window Bottom.....	38
3.1.2 Display of Areas to Edit	40
3.1.3 Locks	41
3.2 Viewing Completed Case Reviews	42
4. Performing Other Actions	44
4.1 Viewing a User Guide	45
4.2 Contacting Us.....	46
4.3 Updating Your Profile	47
4.3.1 User Info.....	48
4.3.2 Changing Your Password.....	49
4.3.3 Preferences	50
4.3.4 Contact Info	51
5. Quick Start Guide	55

1. Getting Started

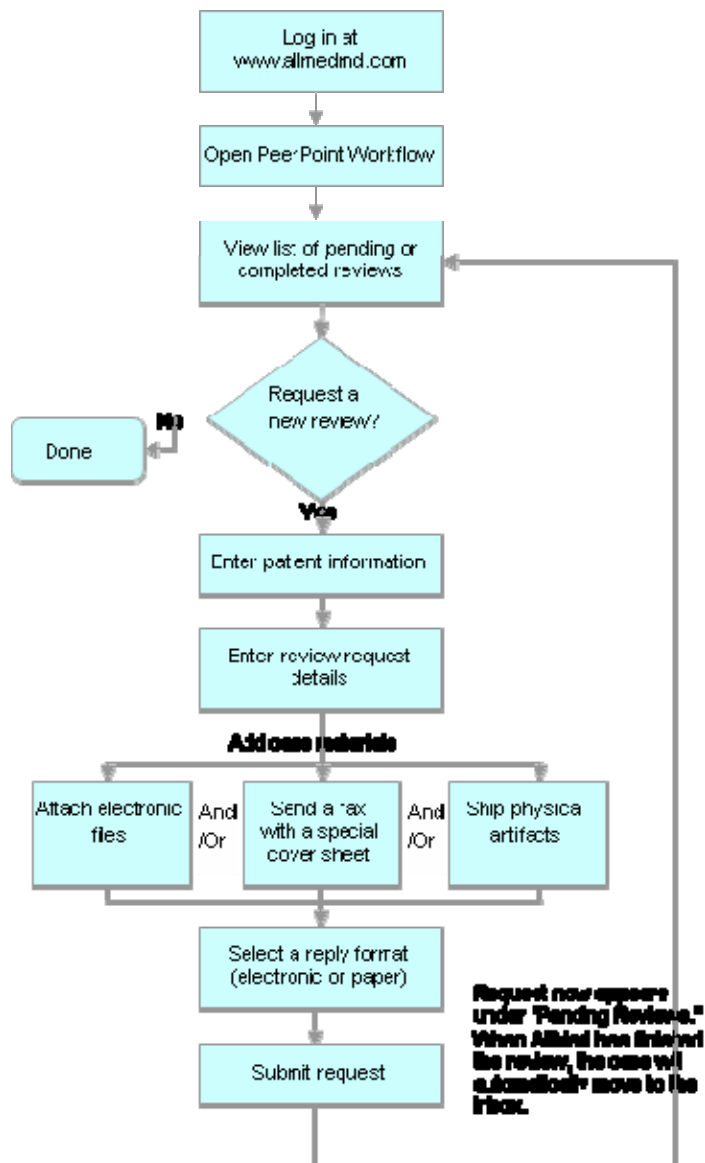


In this section you will learn how to start the **PeerPoint Workflow** application and navigate from the **Dashboard** (initial screen) to all the functions you will need to:

- Submit cases to AllMed for review.
- View and edit cases prior to review start.
- View completed cases.
- Maintain your information (e.g., contact name, phone, fax, email, address).
- Change your password.

1.1 The PeerPoint® Workflow Application

PeerPoint Workflow provides an easy-to-use method for submitting case review requests using a secure web site. This integrated workflow software helps expedite communication and reduces dependence on paper faxes for case materials. All communication between you and AllMed is kept confidential and password protected.



Using **PeerPoint Workflow**, you can request new reviews, edit requests for reviews not yet started, view reviews that have been started, and view completed reviews. Simply log in to see your company's **PeerPoint** page.

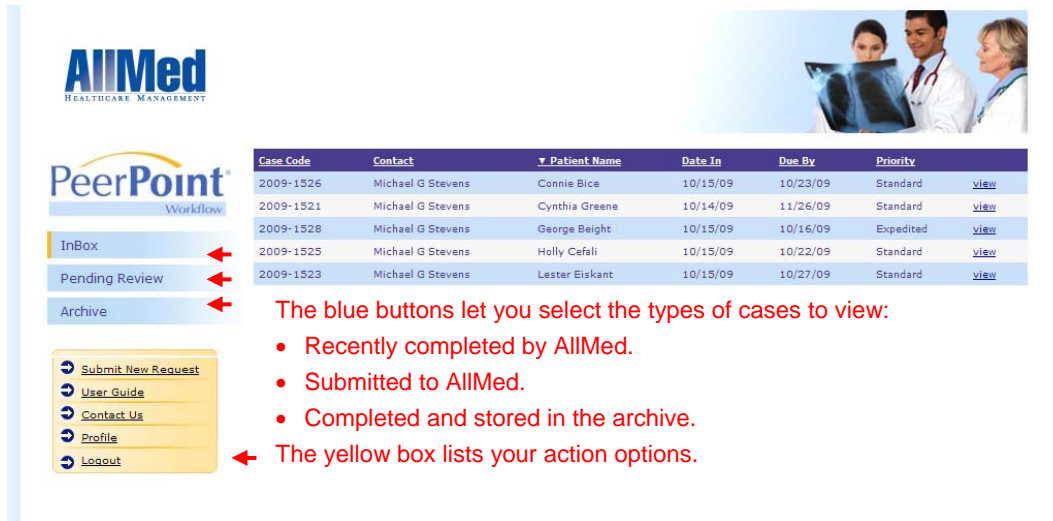
1.2 Opening PeerPoint Workflow

To open the **PeerPoint Workflow** application:

1. Go to www.allmedmd.com/login.
2. Log in using the **PeerPoint Login** and **Password** that AllMed provided to you.



The **PeerPoint Workflow** application opens the initial screen (also referred to as “**Dashboard**”) displaying your viewing and action options. Everything you need to do will start at the “**Dashboard**,” using the blue buttons and yellow menu box you see on this screen.



AllMed
HEALTHCARE MANAGEMENT

PeerPoint
Workflow

InBox
Pending Review
Archive

Submit New Request
User Guide
Contact Us
Profile
Logout

Case Code	Contact	▼ Patient Name	Date In	Due By	Priority	
2009-1526	Michael G Stevens	Connie Bice	10/15/09	10/23/09	Standard	view
2009-1521	Michael G Stevens	Cynthia Greene	10/14/09	11/26/09	Standard	view
2009-1528	Michael G Stevens	George Beight	10/15/09	10/16/09	Expedited	view
2009-1525	Michael G Stevens	Holly Cefali	10/15/09	10/22/09	Standard	view
2009-1523	Michael G Stevens	Lester Eiskant	10/15/09	10/27/09	Standard	view

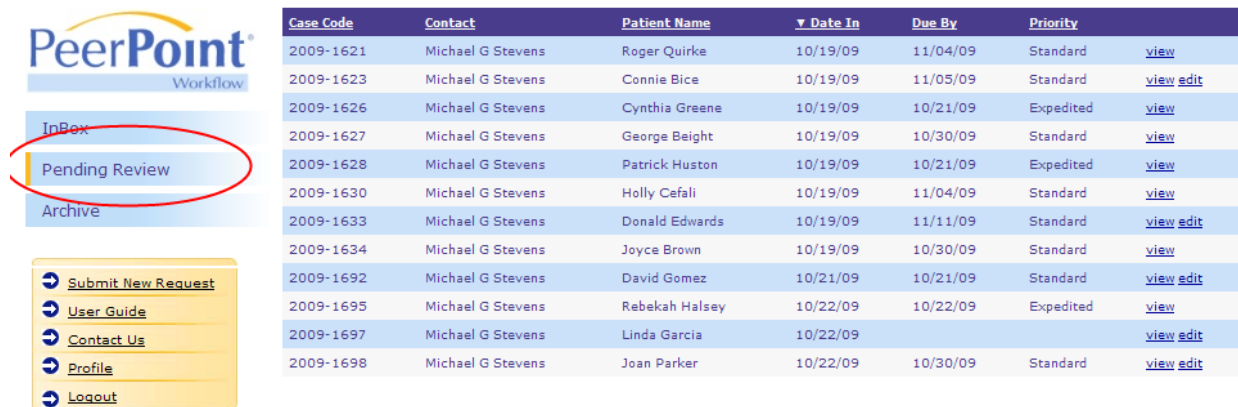
The blue buttons let you select the types of cases to view:

- Recently completed by AllMed.
- Submitted to AllMed.
- Completed and stored in the archive.

The yellow box lists your action options.

1.3 Using the Blue Buttons for Selecting Cases to View

The chosen list of cases appears to the right of the blue buttons. Which button has been selected is indicated by the yellow border to the left of the selected button. Details about what you will see when viewing cases are found in section, “Viewing and Editing Case Review Requests,” on page 38.



PeerPoint
Workflow

InBox
Pending Review
Archive

Submit New Request
User Guide
Contact Us
Profile
Logout

Case Code	Contact	Patient Name	▼ Date In	Due By	Priority	
2009-1621	Michael G Stevens	Roger Quirke	10/19/09	11/04/09	Standard	view
2009-1623	Michael G Stevens	Connie Bice	10/19/09	11/05/09	Standard	view edit
2009-1626	Michael G Stevens	Cynthia Greene	10/19/09	10/21/09	Expedited	view
2009-1627	Michael G Stevens	George Beight	10/19/09	10/30/09	Standard	view
2009-1628	Michael G Stevens	Patrick Huston	10/19/09	10/21/09	Expedited	view
2009-1630	Michael G Stevens	Holly Cefali	10/19/09	11/04/09	Standard	view
2009-1633	Michael G Stevens	Donald Edwards	10/19/09	11/11/09	Standard	view edit
2009-1634	Michael G Stevens	Joyce Brown	10/19/09	10/30/09	Standard	view
2009-1692	Michael G Stevens	David Gomez	10/21/09	10/21/09	Standard	view edit
2009-1695	Michael G Stevens	Rebekah Halsey	10/22/09	10/22/09	Expedited	view
2009-1697	Michael G Stevens	Linda Garcia	10/22/09			view edit
2009-1698	Michael G Stevens	Joan Parker	10/22/09	10/30/09	Standard	view edit

UPDATE: Case Status

Since publication of this manual, a new field has been added to the “Pending Review” view that show the status of the case as it moves through AllMed’s process. These statuses are as follows:

- ✓ Case preparation – AllMed is preparing the case and materials for the peer reviewer
- ✓ At Peers -- the peer has received the case and AllMed is awaiting his/her reply
- ✓ Processing – AllMed has received the reply from the peer and is completing the document and any associated peer-to-peer calls
- ✓ MD Approval - Once the case has been through processing, AllMed’s Medical Director or Associate Medical Director does a final Clinical QA process to make sure all clinical content is accurate
- ✓ QA – AllMed’s final step, every review is reviewed by a professional proofreader to insure consistent quality

For Internet Explorer Users

For proper display of PeerPoint in Internet Explorer, you must change the following settings.

1.1.1.1 If you have Internet Explorer version 6 or older:

1. From the **Tools** menu, choose **Internet Options**.
2. Under **Temporary Internet Files**, click **Settings**.
3. Under **Check for newer versions of stored pages**, choose **Every visit to the page**.
4. Click **OK** to close the Settings window, and then click **OK** to close the Internet Options window.

1.1.1.2 If you have Internet Explorer version 7:

1. From the **Tools** menu, choose **Internet Options**.
2. Under **Browsing history**, click **Settings**.
3. Under **Temporary Internet Files/Check for newer versions of stored pages**, choose **Every time I visit the webpage**.
4. Click **OK** to close the Temporary Internet Files and History Settings window, and then click **OK** to close the Internet Options window.

1.3.1 Inbox

The **Inbox** selection displays the cases for which AllMed has recently completed a review. These cases may be viewed, but not edited. All completed case reviews are automatically moved to the **Archive** list after 30 days; however, you can manually archive a completed case at any time.

1.3.2 Pending Review

The **Pending Review** selection displays all cases that you have submitted to AllMed for review. It also displays any cases for which you have created a review request, but have not yet submitted the request to AllMed (Pre-Submitted cases). Cases that have been started by AllMed may be viewed, but not edited. Cases that have not been started by AllMed may be edited. On each list, you may click on a column header to sort the list.

Case Code	Contact	▼ Patient Name	Date In	Due By	Priority	
2009-1527	Michael G Stevens	Betty Kleiman	10/15/09	10/26/09	Standard	view
2009-1524	Michael G Stevens	Eileen Boyd	10/15/09	10/21/09	Standard	view edit

Click a column header to sort the cases. For example, click **Due By** to sort the list by due date.

1.3.3 Archive

The **Archive** selection displays all case reviews that have been completed by AllMed, and that have been automatically or manually archived. These cases may be viewed, but not edited. All completed case reviews are automatically moved from your **Inbox** to the **Archive** list after 30 days; however, you can manually archive a completed case at any time.

To manually archive a completed case:

1. In your **Inbox** list, click [view](#) on the line of the case review you want to archive.


Case Code	Contact	▼ Patient Name	Date In	Due By	Priority	
2009-1629	Michael G Stevens	Betty Kleiman	10/19/09	11/02/09	Standard	view
2009-1620	Michael G Stevens	Eileen Boyd	10/19/09	11/02/09	Standard	view

2. Click the **Archive** button at the bottom of the window.



Review Response | Request Info | Questions | Materials

Review

Determination: Upheld

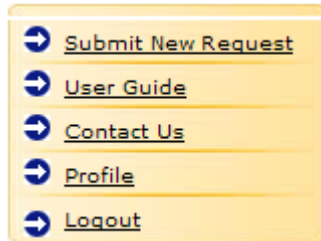
 Independent Medical Review
[view](#) [download pdf](#)

Related Documents

1.4 Using the Actions in the Yellow Box

You will mostly perform the first action in the list, **Submit New Request**. This action will be how you identify and describe each case you submit to AllMed. The details for submitting a new request is found in the section, “Submitting a New Request,” on page 11.



The next three actions in the list provide you the option of viewing an online copy (PDF) of this **User Guide**, contacting AllMed, or updating your **Profile** information (email address, phone number, etc.). The details of these actions are found in “Performing Other Actions,” on page 44.

The last action listed, **Logout**, is how you exit the **PeerPoint Workflow** application. When you select **Logout**, the application returns to the AllMed website, from which you logged into the **PeerPoint Workflow** application.

1.5 Summary

You have learned about the navigation options that appear in the first window of the **PeerPoint Workflow** application. The blue buttons provide options for viewing cases recently completed by AllMed, cases that have been submitted or are going to be submitted to AllMed, and completed cases that you can view for a period of up to one year. The yellow band on the left side of the blue button tells you which group of cases is listed on the screen.

The action options in the yellow box include the primary action you will take, **Submit New Request**. A great portion of this user guide addresses how you complete case review requests. Also listed are other actions you will perform occasionally and the logout action, where you leave the program.

The table below will help you find the details of how to create case review requests, view and edit cases, and perform other, ancillary actions.

Major Section	Subsection	Page #
2. Submitting a Review Request	2.1 Submitting a New Request	11
	2.2 Creating a Pre-submittal Request	33
3. Viewing and Editing Cases	3.1 Viewing and Editing Case Review Requests	38
	3.2 Viewing Completed Case Review	42
4. Performing Other Actions	4.1 Viewing a User Guide	45
	4.2 Contacting Us	46
	4.3 Updating Your Profile	47
	4.3.2 Changing Your Password	49

2. Submitting a Review Request



PeerPoint Workflow provides a **Case Submission Wizard** that walks you through the steps required to submit a case review request to AllMed. The **Case Submission Wizard** also accommodates your occasional need to hold back a case review request you have started but need to take some other action before submitting.

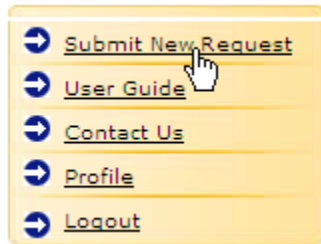
This section addresses how you:

- Submit a new case review request.
- Create a pre-submittal case review request.

2.1 Submitting a New Request

The **Wizard** opens windows for you to input groups of related information, and you progress from one window to the next, completing your request:

- Patient Information.
- Request Information.
- Questions.
- Electronic Files.
- Artifacts.
- Delivery Information.



When you click on **Submit New Request**, the **Case Submission Wizard** opens the **Patient Information** window. You will enter the information needed when submitting a review request. The paragraphs below describe how you enter the information.

2.1.1 Entering Patient Information

The yellow highlight on the left side of the screen shows you which group of information you are currently working on. When you click on one of the **Next Step** buttons at the top right or bottom right corners, the **Wizard** will open the next window. However, if you have not entered all required information, the **Wizard** will not allow you to move to the next window. The missing information is flagged. You can enter the information or click one of the **Cancel Wizard** buttons at the top left or bottom left corners.

Canceling the request before the **Patient Information** is complete results in no request record being created. If you use the **Cancel Wizard** button on subsequent screens, you will have a record that has been partially completed (see “Creating a Pre-submittal Request” on page 36.)



The **Contact** will show the default contact. You may choose to identify a different contact if, for example, the contact listed will not be available during the time of case review. If you have other contacts listed in your **Profile**, you may use the dropdown list and select another contact from the list (see “Contact Info” on page 51).

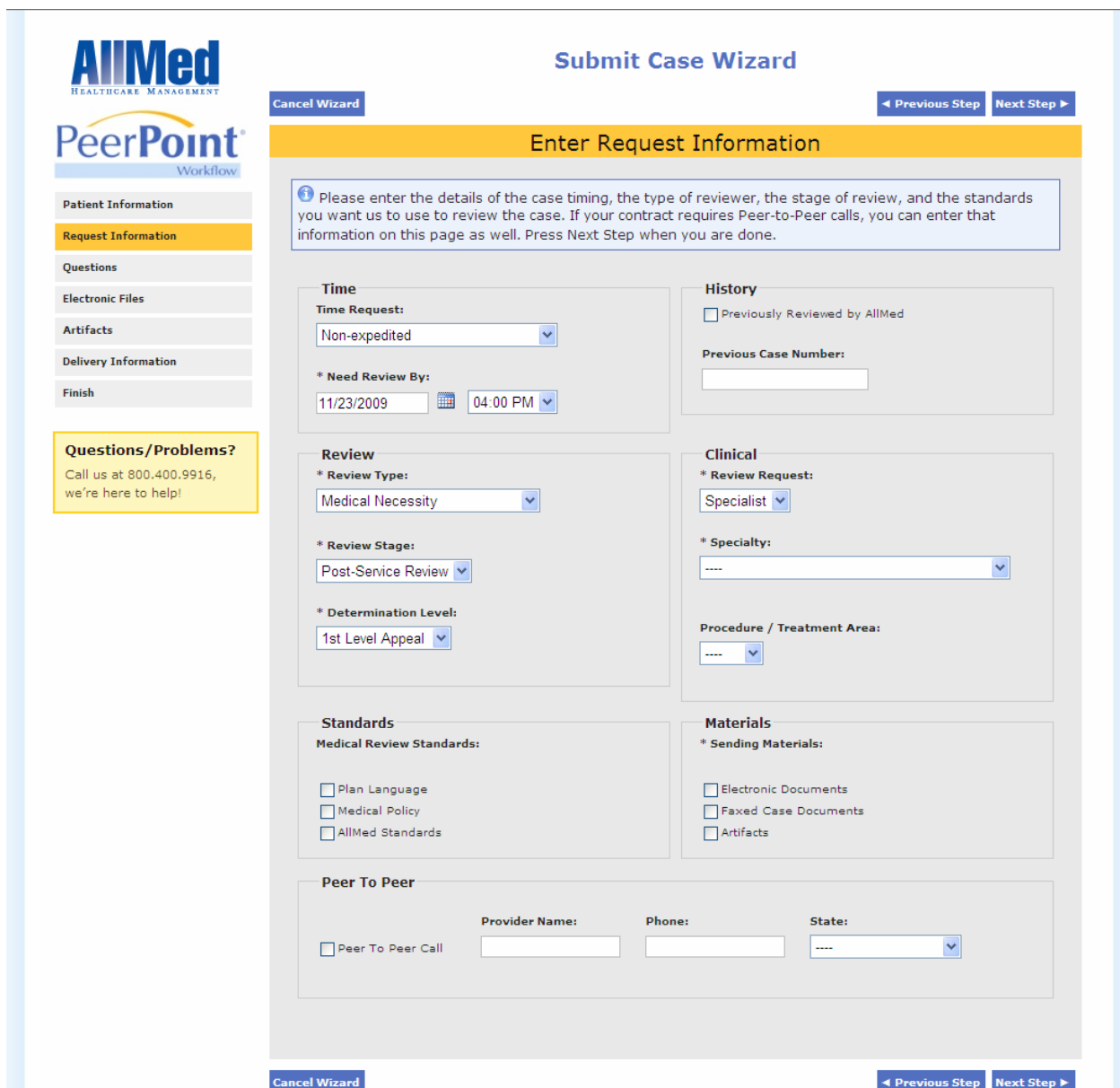
Required fields are marked with an asterisk. In this window, all information must be completed.

Click on **Next Step** to proceed to the next window.

2.1.2 Entering Request Information

In the **Request Information** window, the **Next Step** buttons in the top right or bottom right corners will move you to the next window; and the **Cancel Wizard** buttons in the top left or bottom left corners will take you back to the **Dashboard**. Required fields are marked with an asterisk.

The **Request Information** window also displays **Previous Step** buttons in the top right or bottom right corners, allowing you to navigate to the previous window so you can change information.



Submit Case Wizard

Cancel Wizard Previous Step Next Step

Enter Request Information

Please enter the details of the case timing, the type of reviewer, the stage of review, and the standards you want us to use to review the case. If your contract requires Peer-to-Peer calls, you can enter that information on this page as well. Press Next Step when you are done.

Time

Time Request:
Non-expedited

*** Need Review By:**
11/23/2009 04:00 PM

History

Previously Reviewed by AllMed

Previous Case Number:

Review

*** Review Type:**
Medical Necessity

*** Review Stage:**
Post-Service Review

*** Determination Level:**
1st Level Appeal

Clinical

*** Review Request:**
Specialist

*** Specialty:**

Procedure / Treatment Area:

Standards

Medical Review Standards:

Plan Language
 Medical Policy
 AllMed Standards

Materials

*** Sending Materials:**

Electronic Documents
 Faxed Case Documents
 Artifacts

Peer To Peer

Peer To Peer Call

Provider Name:

Phone:

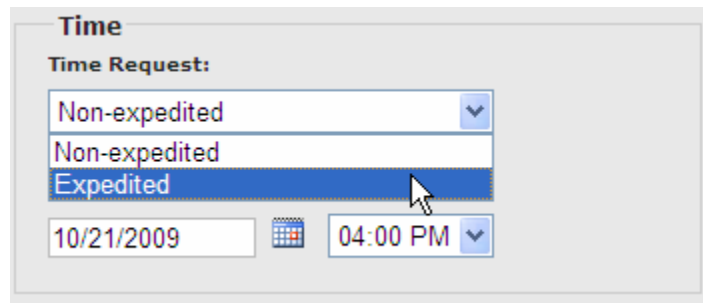
State:

Cancel Wizard Previous Step Next Step

2.1.2.1 Time

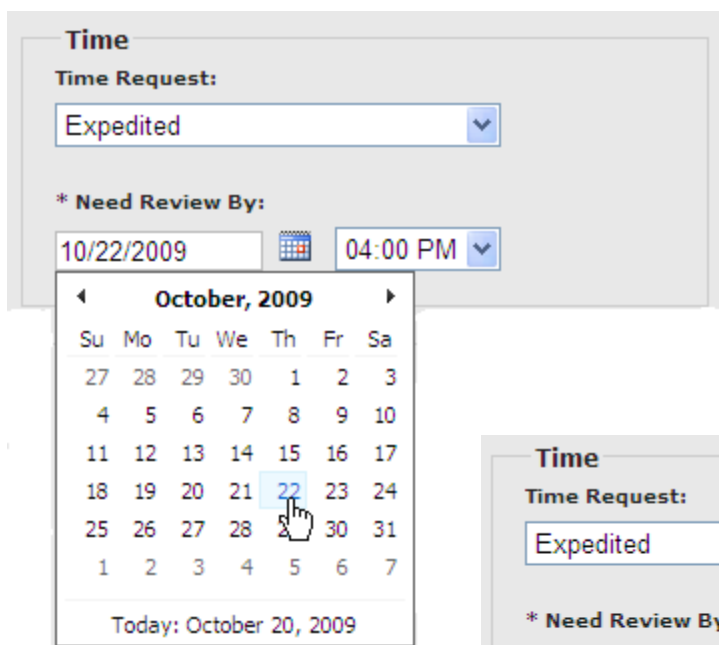
The **Time** area of the window allows you to specify the **Time Request**, **Non-expedited** or **Expedited**, and the **Need Review By** date and time.

1. Use the dropdown list to select the **Time Request**.



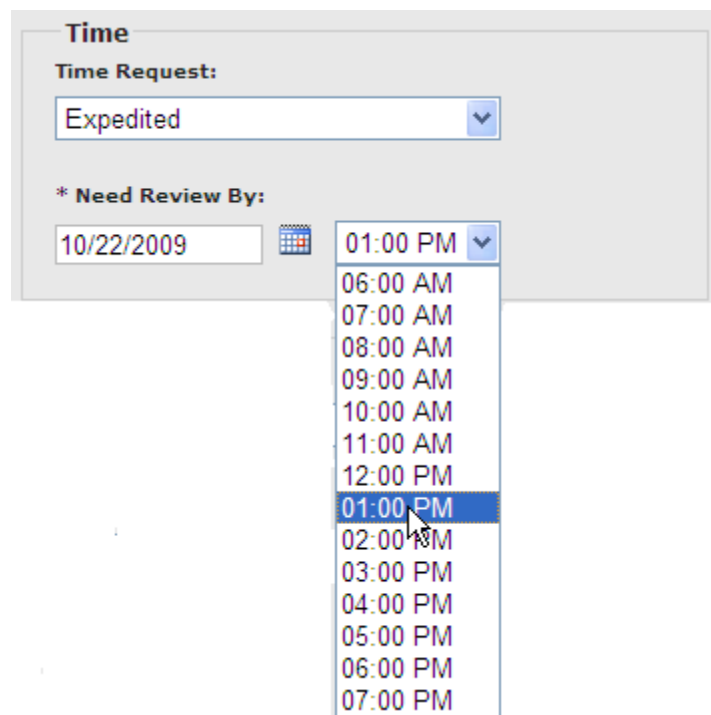
The screenshot shows the 'Time' section of a software interface. Under the heading 'Time Request:', there is a dropdown menu that is currently open. The menu shows three options: 'Non-expedited', 'Non-expedited', and 'Expedited'. The 'Expedited' option is highlighted in blue, and a mouse cursor is pointing at it. Below the dropdown menu, there is a date field containing '10/21/2009' and a time field containing '04:00 PM'.

2. Use the calendar to select a **Need Review By** date.



This screenshot shows the 'Time' section with the 'Time Request' dropdown set to 'Expedited'. Below it, the '* Need Review By:' section shows a date field with '10/22/2009' and a time field with '04:00 PM'. A calendar pop-up is displayed over the date field, showing the month of October 2009. The date '22' is highlighted in blue, and a mouse cursor is pointing at it. The calendar also shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and the current date 'Today: October 20, 2009'.

3. Use the dropdown list to select a **Need Review By** time. Note that you enter the time for your time zone. PeerPoint will automatically adjust the time as needed for differences in time zones.

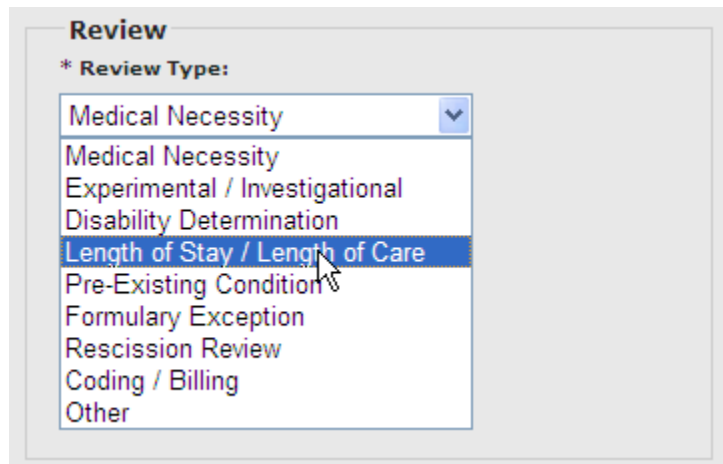


This screenshot shows the 'Time' section with the 'Time Request' dropdown set to 'Expedited'. Below it, the '* Need Review By:' section shows a date field with '10/22/2009' and a time dropdown menu that is open. The menu lists times from '01:00 PM' to '07:00 PM' in one-hour increments. The '01:00 PM' option is highlighted in blue, and a mouse cursor is pointing at it.

2.1.2.2 Review Details

The **Review** area of the window allows you to indicate the **Review Type**, **Review Stage**, and **Determination Level** of the review.

1. Use the dropdown list to select the **Review Type**.

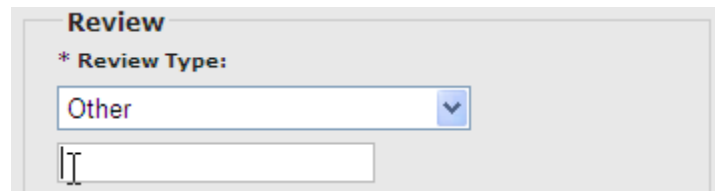


Review

* **Review Type:**

- Medical Necessity
- Medical Necessity
- Experimental / Investigational
- Disability Determination
- Length of Stay / Length of Care
- Pre-Existing Condition
- Formulary Exception
- Rescission Review
- Coding / Billing
- Other

2. If you select **Other**, type in the description of the other **Review Type**.

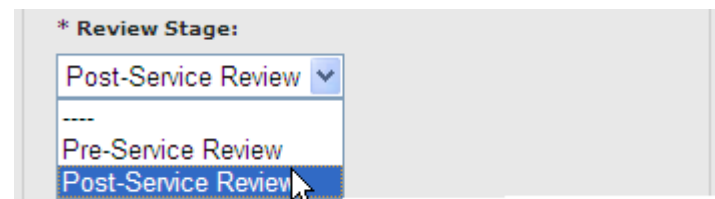


Review

* **Review Type:**

Other

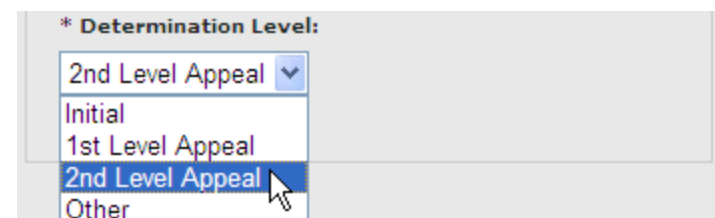
3. Use the dropdown list to select the **Review Stage**.



* **Review Stage:**

- Post-Service Review
-
- Pre-Service Review
- Post-Service Review

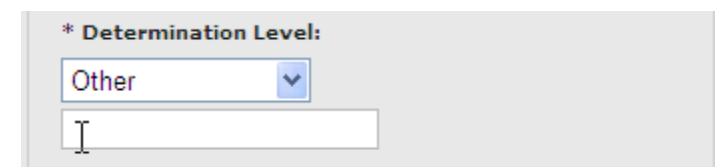
4. Use the dropdown list to select the **Determination Level**.



* **Determination Level:**

- 2nd Level Appeal
- Initial
- 1st Level Appeal
- 2nd Level Appeal
- Other

5. If you select **Other**, type in the description of the other **Determination Level**.



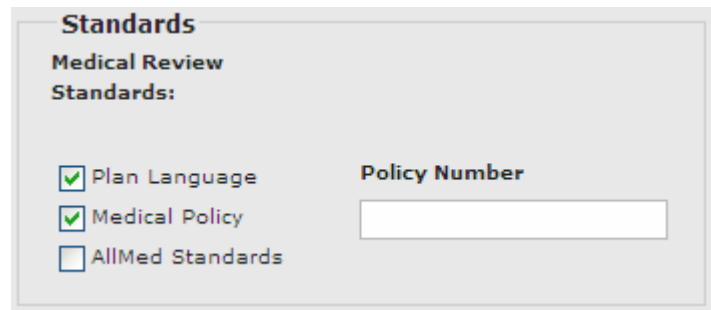
* **Determination Level:**

Other

2.1.2.3 Standards

The **Standards** area of the window allows you to indicate the **Medical Review Standards** upon which to base the review:

- **Plan Language.**
- **Medical Policy.**
- **AllMed Standards.**

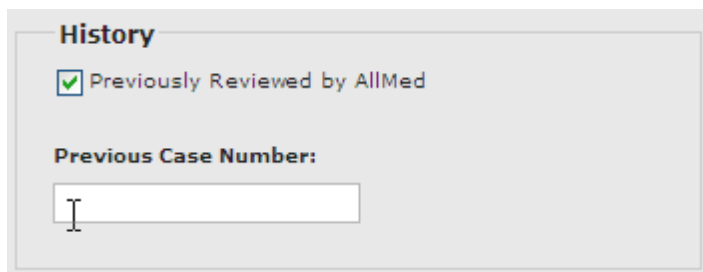


Multiple selections are valid. At least one choice must be selected.

If you select **Medical Policy**, the typing area on the right will open for you to type a **Medical Policy** reference. Type a policy number in the **Medical Policy Number** field if you've been instructed by your manager to do so for reporting purposes. AllMed can use this information to generate a report that indicates, for example, the percentage of denials overturned by AllMed for a particular medical policy number.

2.1.2.4 History

The **History** area of the window allows you to specify if AllMed reviewed the case previously and, if so, the **Previous Case Number**.

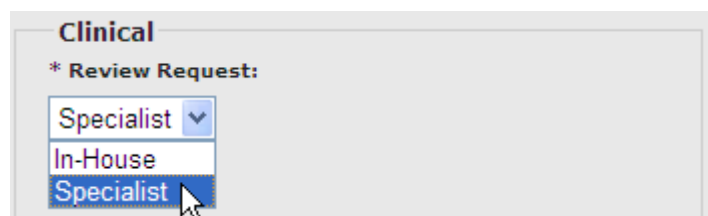


If you check the box for **Previously Reviewed by AllMed**, the **Previous Case Number** field will open for you to type in the number.

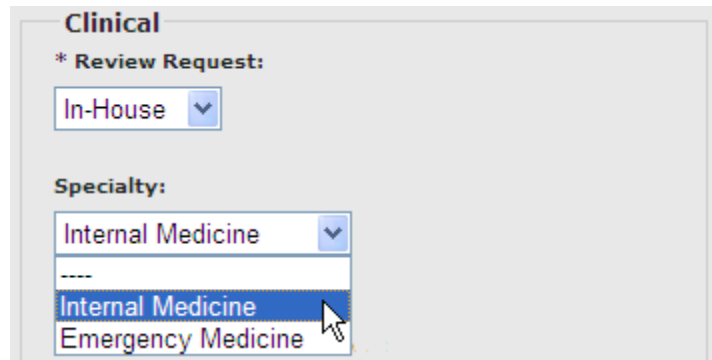
2.1.2.5 Clinical

The **Clinical** area of the window allows you to indicate whether the **Review Request** is for an AllMed in-house medical reviewer or a network specialist reviewer, what the **Specialty** is, and the **Procedure / Treatment Area**.

1. Use the dropdown list to select either a **Specialist** review or an **In-House** review.



- If you selected **In-House**, the dropdown list below displays. Make your **Specialty** selection from the choices displayed.



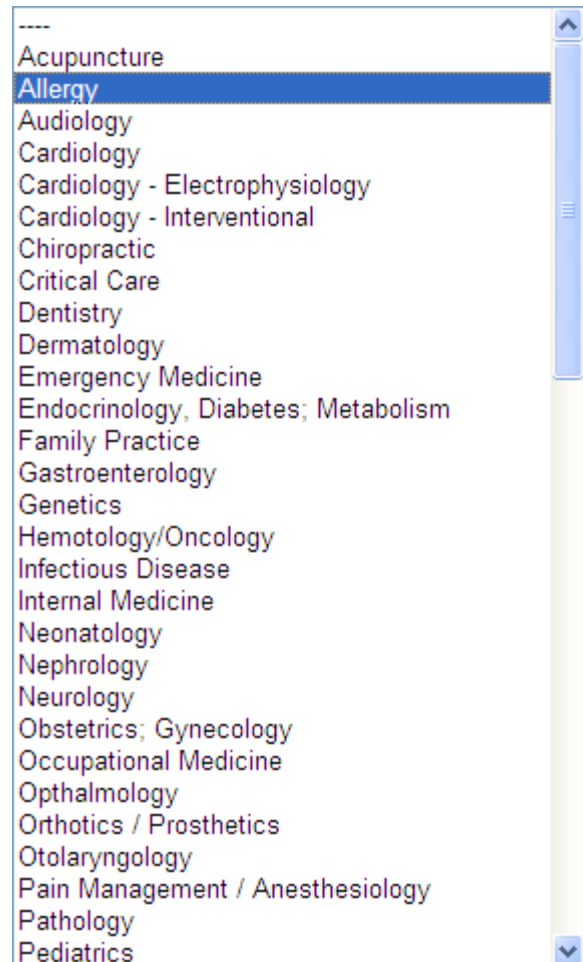
Clinical

* Review Request:
 In-House ▼

Specialty:
 Internal Medicine ▼

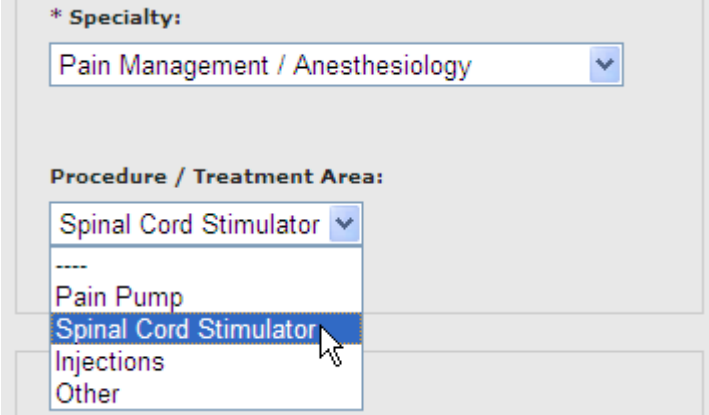
 Internal Medicine
 Emergency Medicine

- If you selected **Specialist**, the dropdown list to the right appears for you to make your **Specialty** selection. More choices are displayed if you use the window's scroll bar. Select from the choices displayed.



- Acupuncture
- Allergy
- Audiology
- Cardiology
- Cardiology - Electrophysiology
- Cardiology - Interventional
- Chiropractic
- Critical Care
- Dentistry
- Dermatology
- Emergency Medicine
- Endocrinology, Diabetes; Metabolism
- Family Practice
- Gastroenterology
- Genetics
- Hematology/Oncology
- Infectious Disease
- Internal Medicine
- Neonatology
- Nephrology
- Neurology
- Obstetrics; Gynecology
- Occupational Medicine
- Ophthalmology
- Orthotics / Prosthetics
- Otolaryngology
- Pain Management / Anesthesiology
- Pathology
- Pediatrics

- Depending on the **Specialty** selected, choices for **Procedure / Treatment Area** are displayed. Use the dropdown list to select the **Procedure / Treatment Area**.

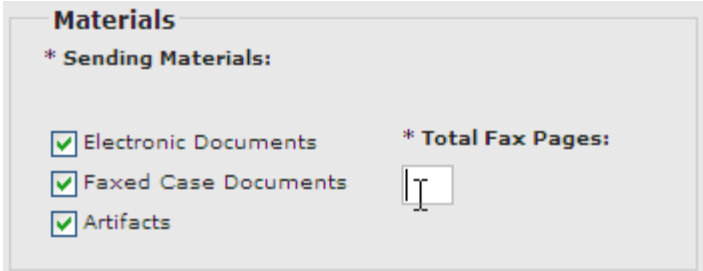


2.1.2.6 Materials

The **Materials** portion of the window allows you to indicate what type of transmittals of case materials you will make, **Electronic Documents**, **Faxed Case Documents**, and/or **Artifacts** (physical items you will send to AllMed).

- Check one, two, or three boxes. At least one box must be checked.

- The **Total Fax Pages** box appears if you have checked the **Faxed Case Documents** box. Type in the number of pages you will be faxing to AllMed. This helps us ensure we receive all the materials you fax.

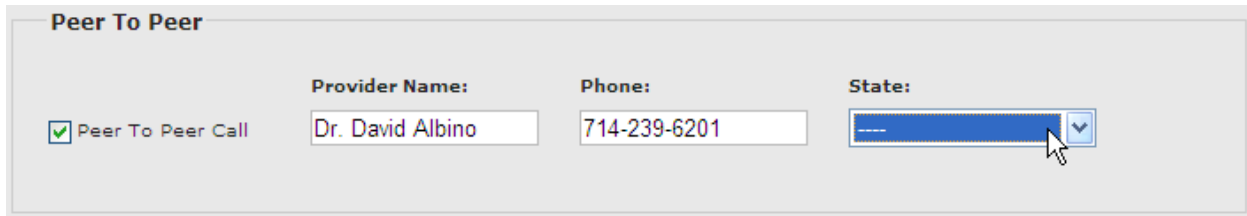


The **Materials** selections you make to indicate what you will be transmitting to AllMed determine which windows the **Case Submission Wizard** will guide you through. Windows related to **Electronic Documents** and **Artifacts** will be processed or omitted to correspond to your checking or not checking those boxes. Checking the **Faxed Case Documents** box will result in the **Wizard** providing you the option of printing a fax cover sheet in a later window.

2.1.2.7 Peer-to-Peer Call

The **Peer to Peer** area of the window allows you to identify a provider for the case reviewer to contact to discuss the case when a denial is being upheld.

Note that this is option applies to you only if your contract includes peer-to-peer calls.



The screenshot shows a form titled "Peer To Peer" with the following fields:

- Peer To Peer Call
- Provider Name: Dr. David Albino
- Phone: 714-239-6201
- State: [Dropdown menu]

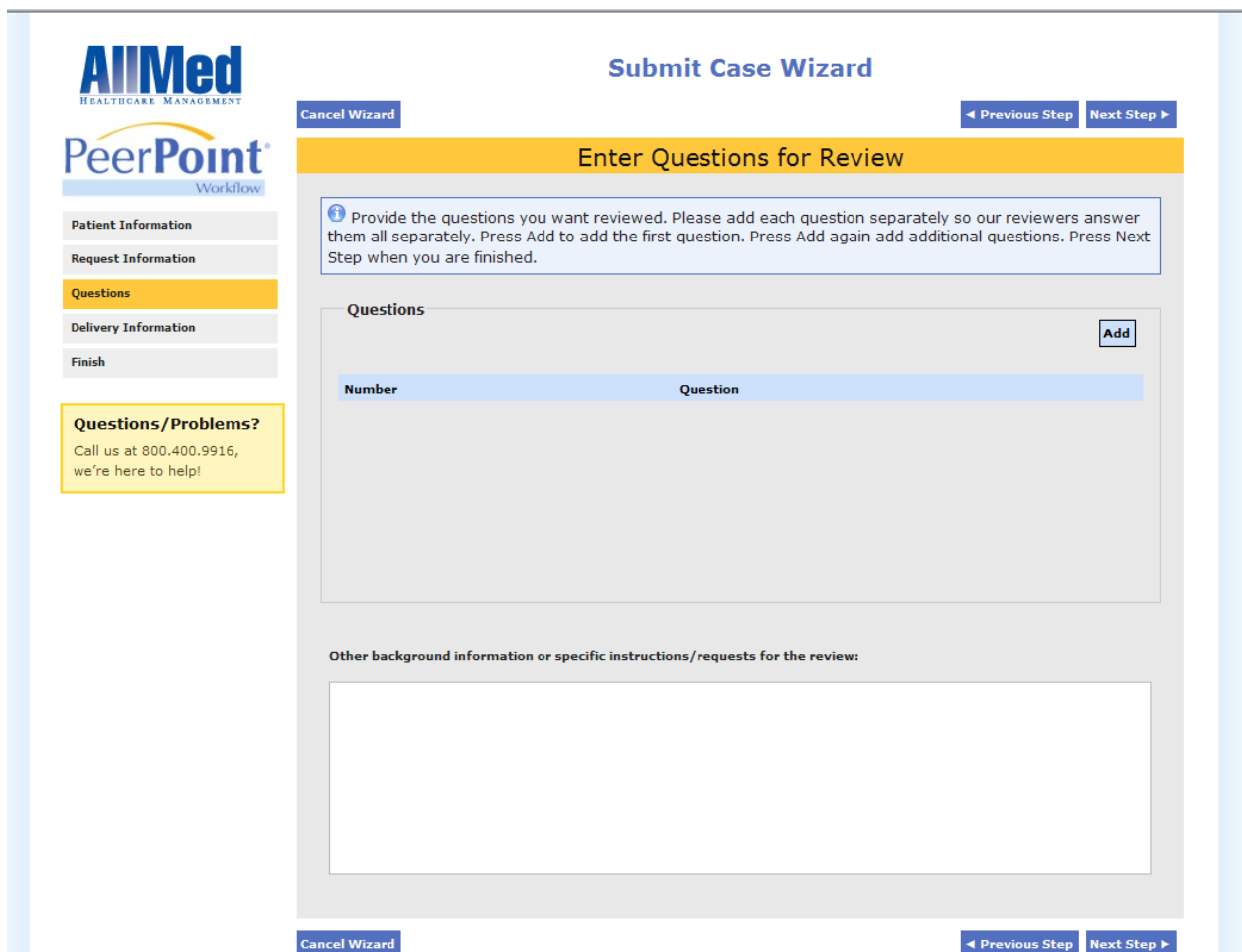
1. Check the **Peer to Peer Call** box.
2. Type the **Provider Name**.
3. Type the provider's **Phone**.
4. Use the dropdown list to select the provider's **State**.



When you have completed the **Request Information**, leave this window by using the **Next Step** (normally), **Previous Step**, or **Cancel Wizard** button.

2.1.3 Entering Questions

In the **Questions** window, the **Next Step** buttons in the top right or bottom right corners will move you to the next window; and the **Cancel Wizard** buttons in the top left or bottom left corners will take you back to the **Dashboard**.

The **Questions** window also displays **Previous Step** buttons in the top right or bottom right corners, allowing you to navigate to the previous window so you can change information.



Submit Case Wizard

Cancel Wizard
◀ Previous Step
Next Step ▶

Enter Questions for Review

i Provide the questions you want reviewed. Please add each question separately so our reviewers answer them all separately. Press Add to add the first question. Press Add again add additional questions. Press Next Step when you are finished.

Questions

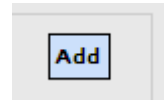
Number	Question

Other background information or specific instructions/requests for the review:

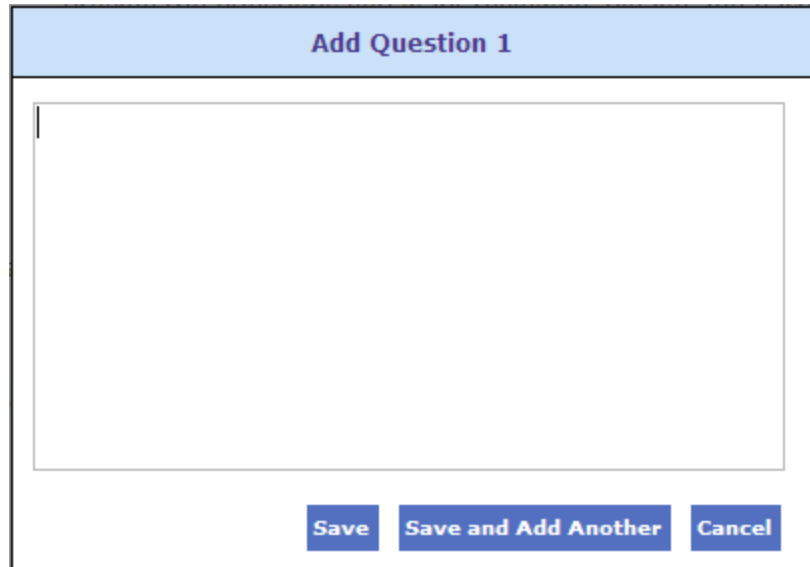
Cancel Wizard
◀ Previous Step
Next Step ▶

The window includes two areas, one for **Questions** and the other for **Other background information or specific instructions/requests for the review**.

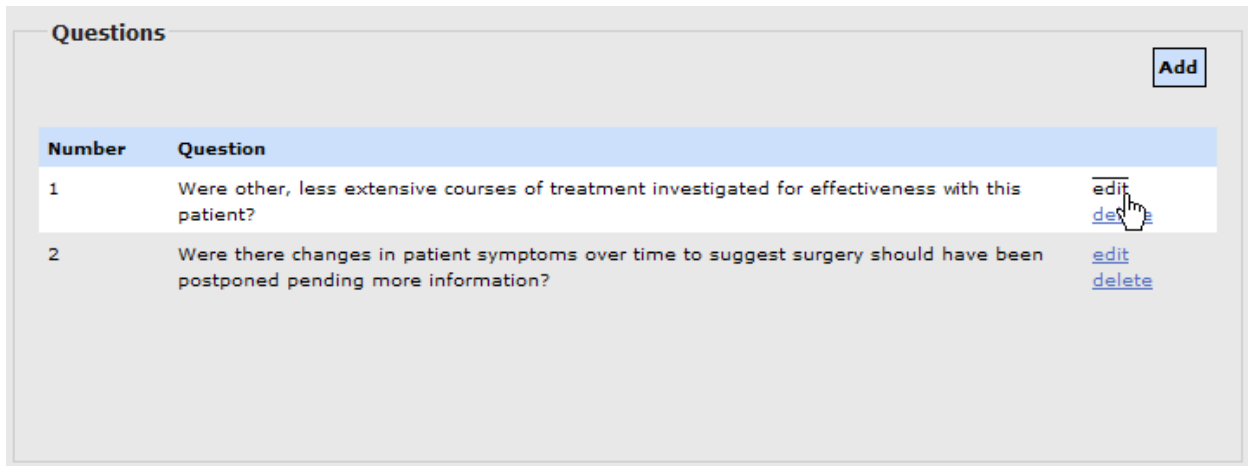
In the **Questions** area, click the **Add** button at the right to add questions. A box opens for you to type a question.



1. Type a case review question.
2. Click on the **Save** button to save the question, without entering any more questions. Or click on the **Save and Add Another** to save the question and bring up a box for another question. Or click on the **Cancel** button to remove the question, which has not been saved.
3. When you have typed the last question, click **Save** to save the last question and move forward.

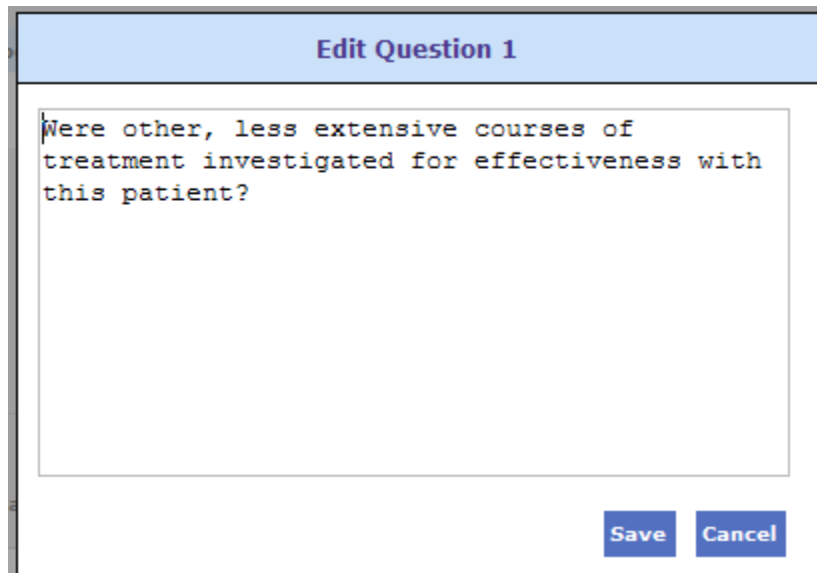


You may edit or delete a question that has been saved and is displayed in the question box.



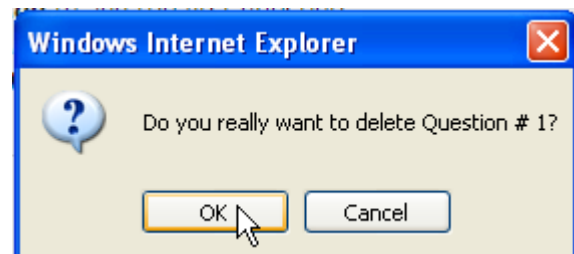
To edit a question:

1. Click on [edit](#). An edit box with the question displayed opens.
2. Type your changes.
3. Click **Save** to save your changes and close the box, or click **Cancel** to close the box without saving changes.



To delete a question:

1. Click on [delete](#).
2. Click **OK** to delete the question or **Cancel** to leave the question in place.



When you have completed the questions, you may enter more information that may be needed for the review (optional). Type any applicable information into the text box or paste information you have copied, e.g., from Word. You will have the opportunity to upload supporting electronic documents in a later step.

Other background information or specific instructions/requests for the review:



When you have completed the **Questions** and the **Other background information or specific instructions/requests for the review**, leave this window by using the **Next Step** (normally), **Previous Step**, or **Cancel Wizard** button.

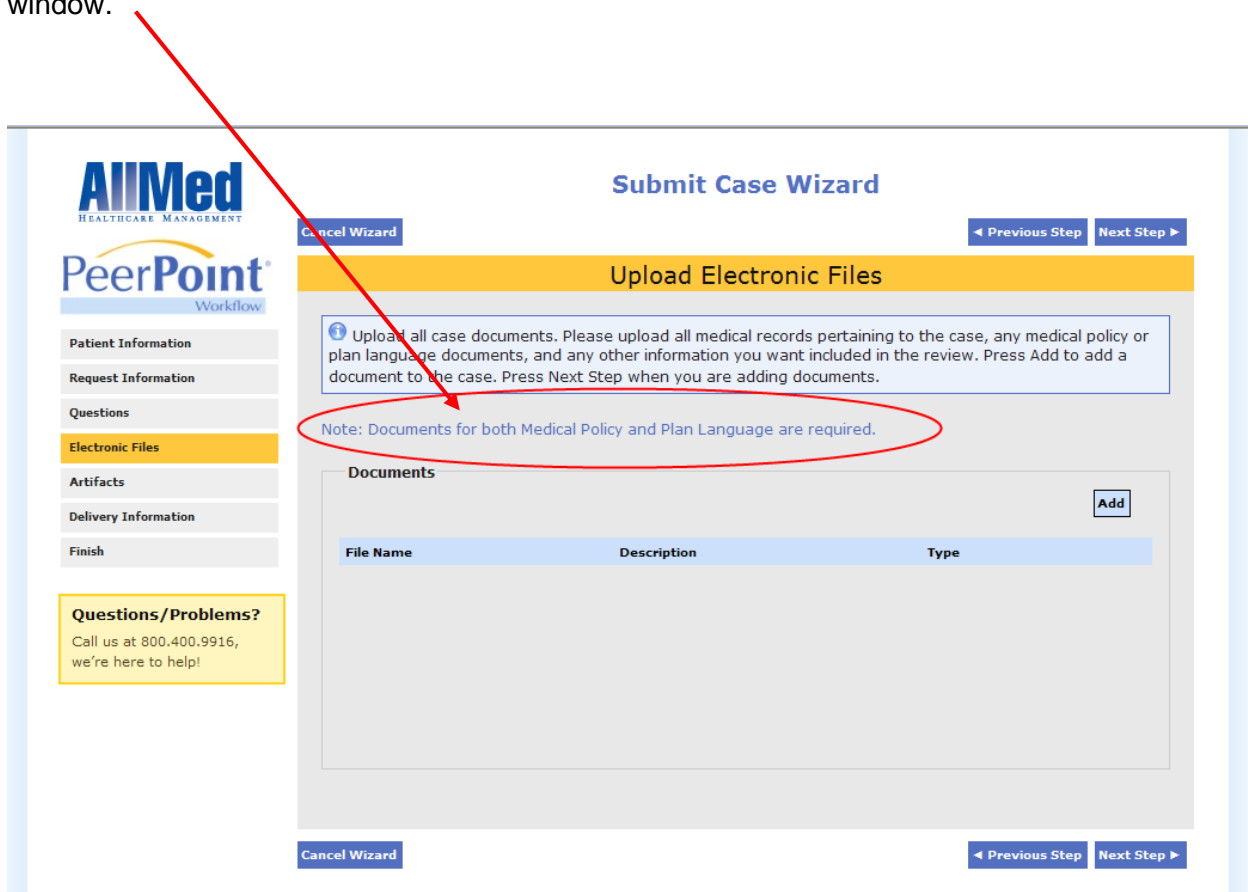
2.1.4 Uploading Electronic Case Materials

The **Case Submission Wizard** guides you to this window if you checked **Electronic Documents** in the **Materials** area of the **Request Information Window**.

In the **Electronic Files** window, the **Next Step** buttons in the top right or bottom right corners will move you to the next window; and the **Cancel Wizard** buttons in the top left or bottom left corners will take you back to the **Dashboard**.

The **Electronic Files** window also displays **Previous Step** buttons in the top right or bottom right corners, allowing you to navigate to the previous window so you can change information.

Note that this window will display the type of electronic documents you checked in a previous window.



The screenshot shows the 'Submit Case Wizard' interface for 'Upload Electronic Files'. On the left is a navigation menu with 'Electronic Files' selected. The main content area includes a 'Cancel Wizard' button, 'Previous Step' and 'Next Step' buttons, and an information box with instructions. A red circle highlights a note: 'Note: Documents for both Medical Policy and Plan Language are required.' Below this is a table for 'Documents' with columns for 'File Name', 'Description', and 'Type', and an 'Add' button.

Cancel Wizard
◀ Previous Step Next Step ▶

Upload Electronic Files

i Upload all case documents. Please upload all medical records pertaining to the case, any medical policy or plan language documents, and any other information you want included in the review. Press Add to add a document to the case. Press Next Step when you are adding documents.

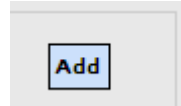
Note: Documents for both Medical Policy and Plan Language are required.

Documents Add

File Name	Description	Type

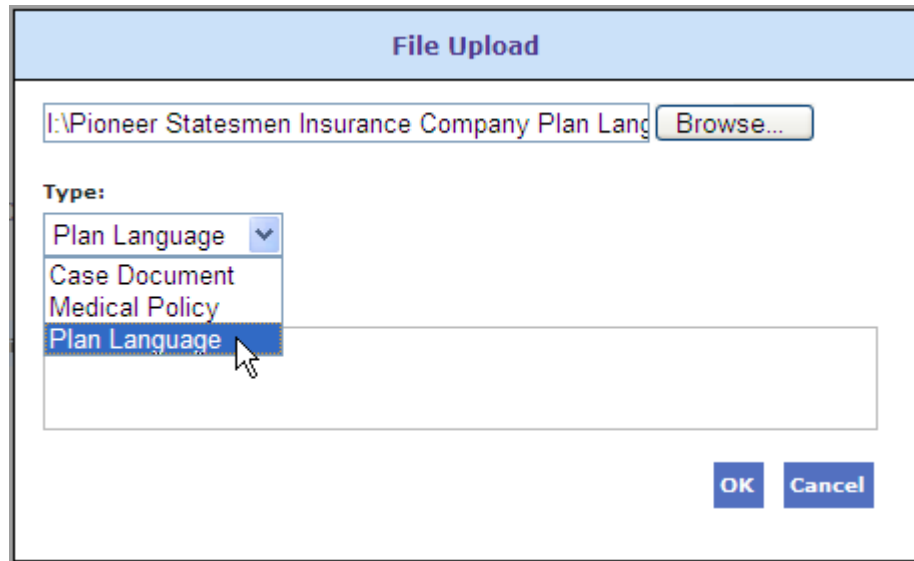
Cancel Wizard
◀ Previous Step Next Step ▶

In the **Electronic Files** area, click the **Add** button at the right to add a file to the list. A **File Upload** window will open. *NOTE: We recommend at least 1.5 mb per second bandwidth for file uploads. At slower speeds, some files may take 5 or 6 minutes to upload.*



1. Identify the file location using the **Browse** button.

2. Indicate file **Type** using the dropdown list. Note that if you checked boxes for **Medical Policy** or **Plan Language** in a previous window, you will be required to upload a file with **Medical Policy** or **Plan Language Type**.



3. (optional) Type a **Description** of the document.

4. Click **OK** to save the file information, or **Cancel** to close the **File Upload** window without saving the file information.

The document information you save will add to the list in the **Documents** area of the window. You may edit or delete a document entry.

Documents			
File Name	Description	Type	
Medical Policy_Pioneer Statesmen Insurance Company.doc	Covers Group 3500	Medical Policy	edit delete
Pioneer Statesmen Insurance Company Plan Language.doc		Plan Language	edit delete
Patient history.doc	All visit records for the past five years	Case Document	edit delete

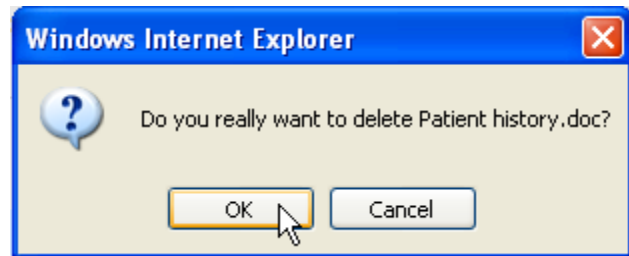
To edit a document entry:

1. Click [edit](#). An open field for **Description** and a dropdown list for **Type** appear.
2. Type into the **Description** field.
3. Select the **Type** from the choices displayed.
4. Click [OK](#) to save the changes or [cancel](#) to leave the information unchanged.

Documents			
File Name	Description	Type	
Medical Policy_Pioneer Statesmen Insurance Company.doc	Covers Group 3500	Medical Policy	edit delete
Pioneer Statesmen Insurance Company Plan Language.doc	<input type="text"/>	Plan Language	OK cancel
Patient history.doc	All visit records for the past five years	Case Document	edit delete

To delete a document entry:

1. Click on [delete](#).
2. Click **OK** to delete the document or **Cancel** to leave the document in place.



When you have completed the **Documents** entries, leave this window by using the **Next Step** (normally), **Previous Step**, or **Cancel Wizard** button.

2.1.5 Identifying Artifacts

The **Case Submission Wizard** guides you to this window if you checked **Artifacts** in the **Materials** area of the **Request Information Window**. This window prompts you to identify and describe the physical items you will be sending to AllMed to support the case review.

In the **Artifacts** window, the **Next Step** buttons in the top right or bottom right corners will move you to the next window; and the **Cancel Wizard** buttons in the top left or bottom left corners will take you back to the **Dashboard**.

The **Artifacts** window also displays **Previous Step** buttons in the top right or bottom right corners, allowing you to navigate to the previous window so you can change information.






- Patient Information
- Request Information
- Questions
- Electronic Files
- Artifacts
- Delivery Information
- Finish

Questions/Problems?
Call us at 800.400.9916,
we're here to help!

Submit Case Wizard

Cancel Wizard
◀ Previous Step
Next Step ▶

Tell Us About Any Artifacts

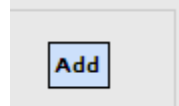
i Please tell us about any artifacts you are shipping with this case. Artifacts may include xrays or other films, bite wings or models, large printed medical records, or any other item you need to ship to us. Press Add to add the first artifact you are shipping to Allmed. Press Add again add additional artifacts. Press Next Step when you are finished.

Artifacts Add

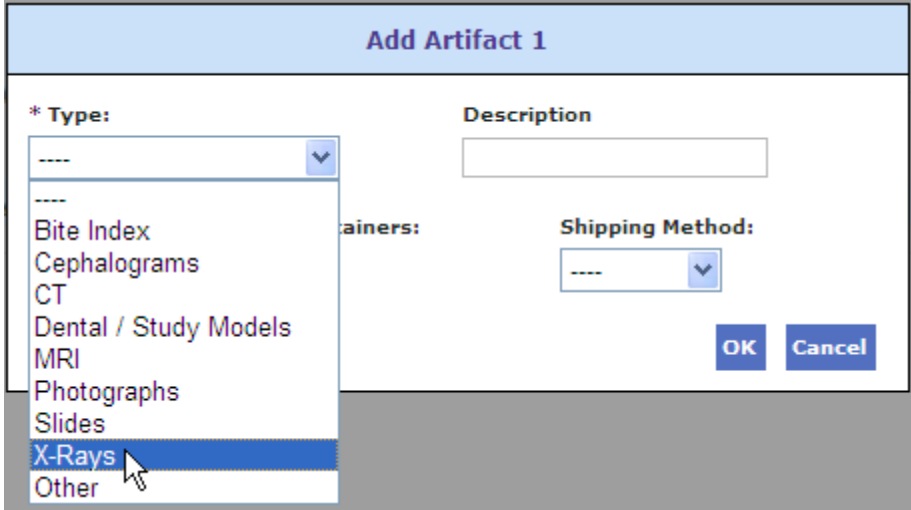
Type	Description	Quantity	Shipping Method	No. of Containers

Cancel Wizard
◀ Previous Step
Next Step ▶

In the **Artifacts** area, click the **Add** button at the right to add an **Artifact** (a physical item you will send to AllMed) to the list. An **Add Artifact** window will open.



1. Identify the artifact **Type** using the dropdown list. The **Type** is required, as indicated with an asterisk.



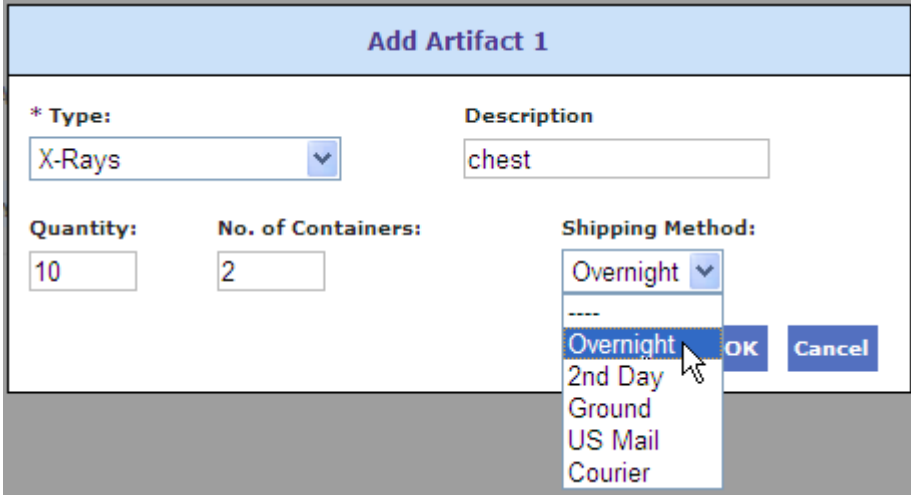
2. Type a **Description** of the artifact.

3. Enter **Quantity**.

4. Enter **No. of Containers**.

5. Identify the **Shipping Method** using the dropdown list.

6. Click **OK** to save the artifact information or **Cancel** to close the window without saving the information.



The artifact information you save will add to the list in the **Artifacts** area of the window. You may edit or delete an artifact entry.

Artifacts					Add
Type	Description	Quantity	Shipping Method	No. of Containers	
X-Rays	chest	10	Overnight	2	edit delete

To edit an artifact entry:

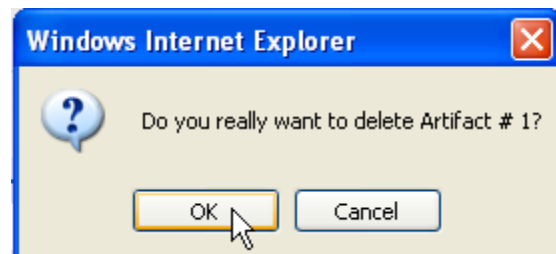
1. Click [edit](#). An **Edit Artifact** window opens.
2. Modify the fields as needed.
3. Click **OK** to save the changes or **Cancel** to leave the information unchanged.

Edit Artifact 1

* Type:		Description	
<input type="text" value="X-Rays"/>		<input type="text" value="chest"/>	
Quantity:	No. of Containers:	Shipping Method:	
<input type="text" value="10"/>	<input type="text" value="2"/>	<input type="text" value="Overnight"/>	
OK		Cancel	

To delete an artifact entry:

1. Click on [delete](#).
2. Click **OK** to delete the artifact or **Cancel** to leave the artifact in place.



When you have completed the **Artifacts** entries, leave this window by using the **Next Step** (normally), **Previous Step**, or **Cancel Wizard** button.

2.1.6 Specifying Delivery Method

In the **Delivery Information** window, the **Next Step** buttons in the top right or bottom right corners will move you to the next window; and the **Cancel Wizard** buttons in the top left or bottom left corners will take you back to the **Dashboard**.

The **Delivery Information** window also displays **Previous Step** buttons in the top right or bottom right corners, allowing you to navigate to the previous window so you can change information.

SCREEN SHOT WILL CHANGE

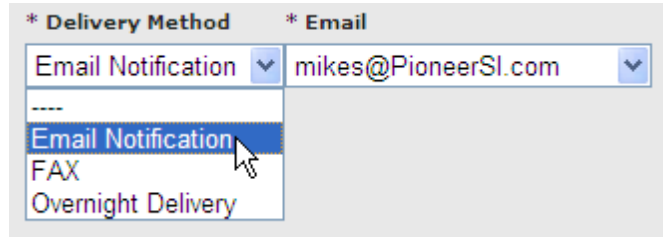


Delivery Method is a required field. You select the method by which AllMed will deliver your completed review.

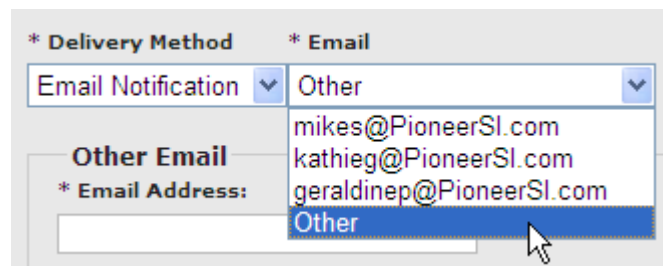
Depending on what you select from the dropdown list, another dropdown list opens to the right.

Based upon contact information you entered (see “Contact Info,” on page 51), choices for **Email**, **Fax**, or **Address** will display.

If you select **Other** instead of one of the values connected to **Contact Info** you have in your **Profile**, a field will open for you to type a description of **Other**.



A screenshot of a web form showing two dropdown menus. The first dropdown, labeled '* Delivery Method', is open and shows three options: 'Email Notification' (selected), 'FAX', and 'Overnight Delivery'. The second dropdown, labeled '* Email', shows the email address 'mikes@PioneerSI.com'.



A screenshot of the same web form. The '* Delivery Method' dropdown is open and 'Other' is selected. Below it, an 'Other Email' section is visible with a label '* Email Address:' and an empty text input field. The '* Email' dropdown is also open, showing a list of email addresses: 'mikes@PioneerSI.com', 'kathieg@PioneerSI.com', 'geraldinep@PioneerSI.com', and 'Other' (which is highlighted by the mouse cursor).

When you have completed the **Delivery Information** entries, leave this window by using the **Next Step** (normally), **Previous Step**, or **Cancel Wizard** button.

2.1.7 Submitting the Completed Request

In the **Finish** window, the **Finish** buttons in the top right or bottom right corners will submit your completed request; and the **Cancel Wizard** buttons in the top left or bottom left corners will take you back to the **Dashboard**.

The **Finish** window also displays **Previous Step** buttons in the top right or bottom right corners, allowing you to navigate to the previous window so you can change information.

Important! This window displays all the case review request information. You must carefully review the information. Once you click the **Finish** button, you have submitted the review request to AllMed. (See next page for printing a fax cover sheet.)




Submit Case Wizard

Cancel Wizard
◀ Previous Step
Finish

Final Step: Review and Submit Review Request

ⓘ Please review all the information you've entered to make sure it's accurate. If you need to make corrections, click Previous Step to back up to another step.

If you are faxing documents to AllMed, please click on Print Fax Cover Sheet to print out this information and use it as the cover sheet.

When all the information is correct, please press Finish to submit the case to AllMed.

Case Code: 2009-9004	Date of Birth: February 15, 1959	Print Fax Cover Sheet
Patient Name: Abigail De Santis	Group ID: 3600	
Patient ID: 10121		

Contact Name: Mike Stevens	Contact Email:	Time Request: Non-expedited
Company: Pioneer Statesmen Insurance Company	Contact Phone:	Date Due: 11/30/2009 4:00 PM
Contact Address:	Contact Fax: 304-890-0001	Delivery Method: FAX

Review Request: Specialist	Review Type: Medical Necessity	Review Stage: Post-Service Review
Procedure / Treatment: Stress Testing	Policy Number: PSIC240	Determination Level: 2nd Level Appeal

Peer to Peer Call needed: Provider Name: Dr. John Dylan Phone: 714-387-2910 State: CA

Medical Review Standards / Definitions:

Plan Language:

Medical Policy:

Review Questions:

1. Does the patient meet all criteria in the medical policy for stress testing?

Other Medical Background:

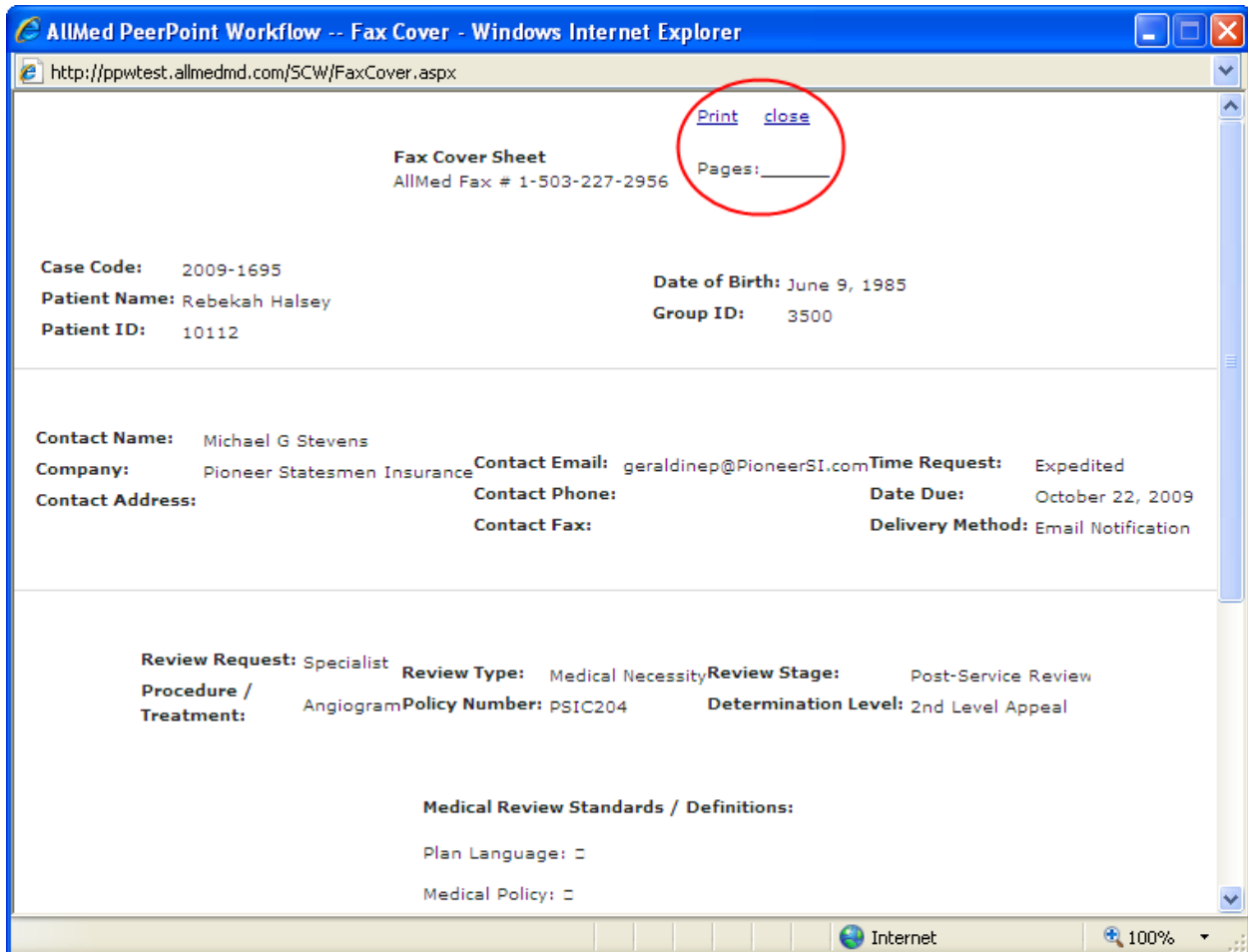
File Name	Description	Document Type
Medical Policy_Pioneer Statesmen Insurance Company.doc		Medical Policy
Patient history.doc		Case Document
Pioneer Statesmen Insurance Company Plan Language.doc		Plan Language

Type	Description	Quantity	Shipping Method	No. of Containers
X-Rays	type AD-617	3	2nd Day	2
Photographs	Slides 10 through 20	11	2nd Day	1

Cancel Wizard
◀ Previous Step
Finish

If you checked the **Faxed Case Documents** in the **Materials** area of the **Request Information** window, a [Print Fax Cover Sheet](#) option displays. This button will not be available after you submit the request, so be sure to print the cover sheet before clicking **Finish**.

1. Click on [Print](#). (When you send the fax, please make a note on the printed cover sheet for number of pages being faxed.)
2. Click on [close](#). The **Case Submission Wizard** will return you to the **Finish** window.



When AllMed staff opens your submitted case and begins processing it, you will receive an email notification telling you the case was received.

2.2 Creating a Pre-submittal Request

If you do not wish to submit your case review request to AllMed at the time you complete the information, you may still save all of the information you have entered. Instead of clicking on the **Finish** button in the window that displays all of the case details, click on **Cancel Wizard**.

Your pre-submittal case review request will appear in the **Pending Review** list. But it will not automatically transfer to AllMed for case review start. Because AllMed will not know whether you intentionally or accidentally failed to submit the request, AllMed will contact you if the case remains as a pre-submittal request for four hours or longer.

Note that you may save a case review request as a pre-submittal request even if you do not proceed to the **Finish** window. Any time you click on **Cancel Wizard**, if you have at least completed the **Patient Information**, a case review request will be saved in your **Pending Review** list.

Submit Case Wizard

Cancel Wizard ◀ Previous Step **Finish** ✕

Final Step: Review and Submit Review Request

i Please review all the information you've entered to make sure it's accurate. If you need to make corrections, click Previous Step to back up to another step.

If you are faxing documents to AllMed, please click on Print Fax Cover Sheet to print out this information and use it as the cover sheet.

When all the information is correct, please press Finish to submit the case to AllMed.

Case Code: 2009-1703	Date of Birth: April 10, 1955	Print Fax Cover Sheet
Patient Name: Donna Trevino	Group ID: 3500	
Patient ID: 10117		

Patient previously reviewed in case

3. Viewing and Editing Cases



Each of your cases will appear on one of three lists: **Inbox**, **Pending Review**, and **Archive**. You may view the cases in all three lists. You may edit only the cases that are in **Pending Review** and only if the review process has not been started.

This section addresses:

- How you view and edit cases in **Pending Review**.
- How you view completed cases in **Inbox** and **Archive**.

3.1 Viewing and Editing Case Review Requests

The **Pending Review** list displays all cases that you have submitted to AllMed for review. It also displays any cases for which you have created a review request, but have not yet submitted the request to AllMed (Pre-submittal cases). Cases that have been started by AllMed may be viewed, but not edited. Cases that have not been started by AllMed may be edited.

To select a pending case review request to view or edit, click [view](#) or [edit](#) on the line where the case is listed.

Case Code	Contact	Patient Name	Date In	Due By	▲ Priority	
2009-1634	Michael G Stevens	Joyce Brown	10/19/09	10/30/09	Standard	view
2009-1633	Michael G Stevens	Donald Edwards	10/19/09	11/11/09	Standard	view edit
2009-1692	Michael G Stevens	David Gomez	10/21/09	10/21/09	Standard	view edit
2009-1703	Michael G Stevens	Donna Trevino	10/23/09	10/30/09	Standard	view edit
2009-1698	Michael G Stevens	Joan Parker	10/22/09	10/30/09	Standard	view edit

3.1.1 Options Buttons at the Window Bottom

The window, shown on the next page, opens for viewing or editing. The buttons at the bottom of the window reflect actions you can take that are dependent on the status of the case. In addition to being “pending,” the cases may be started or not started, and may be pre-submittal or submitted. This array of conditions results in the different button options at the bottom of the view or edit window, as identified in the table below.

Pending Case Review Requests		
Submitted - Not Started	View	Close
	Edit	Save Close (Don't Save)
Submitted - Started	View	Close
	Edit	(not available)
Pre-submittal	View	Close
	Edit	Save Close (Don't Save) Submit

When you open a case for viewing, you click the **Close** button to close the window.

When you are editing a case, you:

- Click the **Save** button to save the edits and close the window.
- Click the **Close (Don't Save)** button to close the window and cancel any changes you typed.
- Click **Submit** if this is a pre-submittal case you wish to submit to AllMed.



- InBox
- Pending Review
- Archive

- [Submit New Request](#)
- [User Guide](#)
- [Contact Us](#)
- [Profile](#)
- [Logout](#)



Case Code: 2009-1703	Company: Pioneer Statesmen Insurance	Patient First Name: Donna
Date Due: October 30, 2009	Contact Name: Michael G Stevens	Patient Last Name: Trevino
Delivery Method: Email Notification	Contact Address: -----	Insured ID: 10117
	Contact Email: kathieg@PioneerSI.com	Group ID: 3500
	Contact Phone: -----	Date of Birth: April 10, 1955
	Contact Fax: -----	

Request Info | Questions | Materials

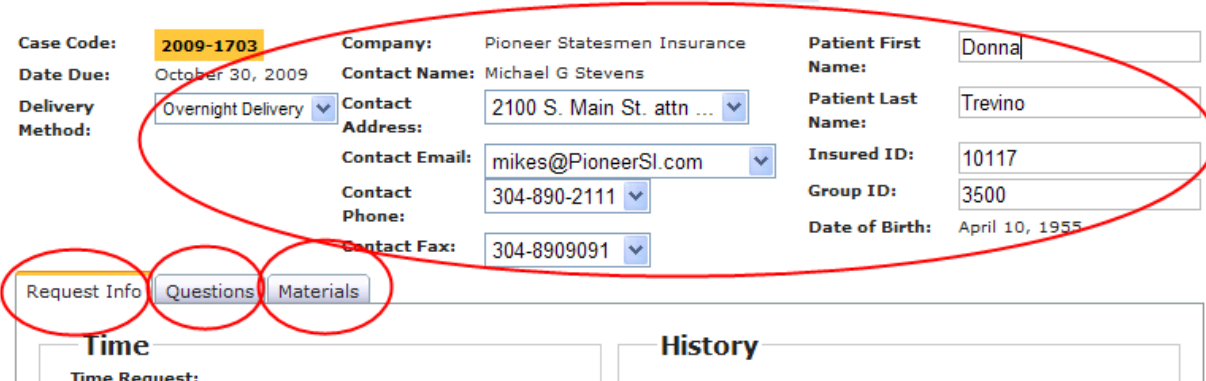
<p>Time</p> <p>Time Request: Non-expedited</p> <p>* Need Review By: 10/30/2009 01:00 PM</p> <p>Review</p> <p>* Review Type: Medical Necessity</p> <p>* Review Stage: Post-Service Review</p> <p>* Determination Level: 2nd Level Appeal</p> <p>Standards</p> <p>Medical Review Standards:</p> <p><input checked="" type="checkbox"/> Plan Language Policy Number: PSIC204 <input checked="" type="checkbox"/> Medical Policy <input type="checkbox"/> AllMed Standards</p>	<p>History</p> <p><input checked="" type="checkbox"/> Previously Reviewed by AllMed</p> <p>Previous Case Number: _____</p> <p>Clinical</p> <p>* Review Request: Specialist</p> <p>Specialty: Obstetrics; Gynecology</p> <p>Procedure / Treatment Area: Hysterectomy</p> <p>Materials</p> <p>* Sending Materials:</p> <p><input checked="" type="checkbox"/> Electronic Documents * Total Fax Pages: <input checked="" type="checkbox"/> Faxed Case Documents 20 <input checked="" type="checkbox"/> Artifacts</p>
<p>Peer To Peer</p> <p><input checked="" type="checkbox"/> Peer To Peer Call Provider Name: Dr. Stanley Miller Phone: 425-389-3060 State: Washington</p>	
<p>Other background or medical information the reviewer may find useful: Please provide three or more literature references.</p> <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>	

[Save](#) [Close \(Don't Save\)](#)

3.1.2 Display of Areas to Edit

When you edit a case review request, there are four areas where you can edit groups of information:

1. Change information at the top of the window by typing into fields and using dropdown lists to select choices displayed.
2. Select **Request Info** tab and edit information in the window that opens.
3. Select **Questions** tab and edit information in the window that opens.
4. Select **Materials** tab and edit information in the window that opens.



Case Code:	2009-1703	Company:	Pioneer Statesmen Insurance	Patient First Name:	Donna
Date Due:	October 30, 2009	Contact Name:	Michael G Stevens	Patient Last Name:	Trevino
Delivery Method:	Overnight Delivery	Contact Address:	2100 S. Main St. attn ...	Insured ID:	10117
		Contact Email:	mikes@PioneerSI.com	Group ID:	3500
		Contact Phone:	304-890-2111	Date of Birth:	April 10, 1955
		Contact Fax:	304-8909091		

Request Info | Questions | Materials

Time
Time Request:

History

3.1.3 Locks


If you see a lock symbol on the list of cases, it means either someone else with permission to open that case has it open, or when you input or edited the case, the last window you worked in did not close properly. The editing session may have timed out before you closed the window.

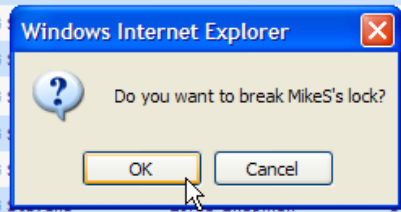
If the lock indicates someone else has the case open, you will not be able to break their lock.

If, when you put the cursor over the lock symbol, it is indicated that you are the user who has the case locked, you can break the lock. The lock symbol draws attention to the case so you can open and edit the case to complete any missing information or make needed changes.

To break the lock:

1. Click on the lock symbol.
2. Click **OK** to remove the lock or **Cancel** to leave lock in place.

Case Code	Contact	▼ Patient Name	Date In	Due By	Priority	
2009-1623	Michael G Stevens	Connie Bice	10/19/09	11/05/09	Standard	view edit
2009-1626	Michael G Stevens	Cynthia Greene	10/19/09	10/21/09	Expedited	view
2009-1692	Michael G Stevens	David Gomez	10/21/09	10/21/09	Standard	view edit
2009-1633	Michael G Stevens	Donald Edwards	10/19/09	11/11/09	Standard	view edit
2009-1627	Michael G Stevens	George Beight	10/19/09	10/30/09	Standard	view
2009-1630	Michael G Stevens	George Beight	10/19/09	11/04/09	Standard	view
2009-1698	Michael G Stevens	George Beight	10/22/09	10/30/09	Standard	view edit
2009-1705	Michael G Stevens	George Beight	10/24/09	10/28/09	Standard	view 
2009-1634	Michael G Stevens	George Beight	10/19/09	10/30/09	Standard	view
2009-1697	Michael G Stevens	George Beight	10/22/09	10/22/09	Standard	view edit
2009-1702	Michael G Stevens	George Beight	10/23/09			view edit



3.2 Viewing Completed Case Reviews

The **Inbox** displays the cases for which AllMed has recently completed a review. These cases may be viewed, but not edited. (The **Archive** also displays completed cases.)

To select a completed case to view, click [view](#) on the line where the case is listed.

Case Code	Contact	▼ Patient Name	Date In	Due By	Priority	
2009-1629	Michael G Stevens	Betty Kleiman	10/19/09	11/02/09	Standard	view
2009-1703	Michael G Stevens	Donna Trevino	10/23/09	10/30/09	Standard	view
2009-1620	Michael G Stevens	Eileen Boyd	10/19/09	11/02/09	Standard	view


Case information displays in the top portion of the window.

Case Code:	2009-1629	Company:	Pioneer Statesmen Insurance	Patient First Name:	Betty
Date Due:	November 2, 2009	Contact Name:	Michael G Stevens	Patient Last Name:	Kleiman
Delivery Method:	Email Notification	Contact Address:		Insured ID:	10107
		Contact Email:	mikes@PioneerSI.com	Group ID:	3400
		Contact Phone:		Date of Birth:	May 17, 1945
		Contact Fax:		Reviewer:	Debra K Gray

Review Response
Request Info
Questions
Materials

Review

Determination: Upheld



Independent Medical Review

[view](#) [download pdf](#)

Related Documents

[MRI Medical Policies.pdf](#)

Below, four tabs display:

1. **Review Response** - Includes the **Determination**, links to the **Independent Medical Review**, and links to any **Related Documents** provided to support the determination.
2. **Request Info** – Information you entered in the original review request.

3. **Questions** – Questions you entered in the original review request.
4. **Materials** – The list of documents and artifacts you transmitted to AllMed.

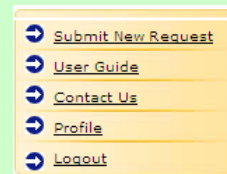
Note that the links to the **Independent Medical Review** allow you to view an HTML version of the report and to download a PDF report file. The HTML file gives you the ability to cut and paste portions of the report into another document and edit what you paste.

4. Performing Other Actions



This section addresses three of the action options available in the yellow box display:

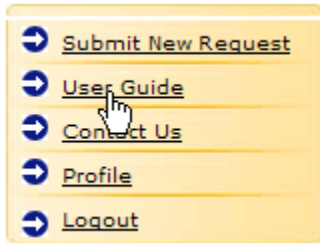
- Viewing a **User Guide**.
- Contacting us.
- Updating your **Profile**.



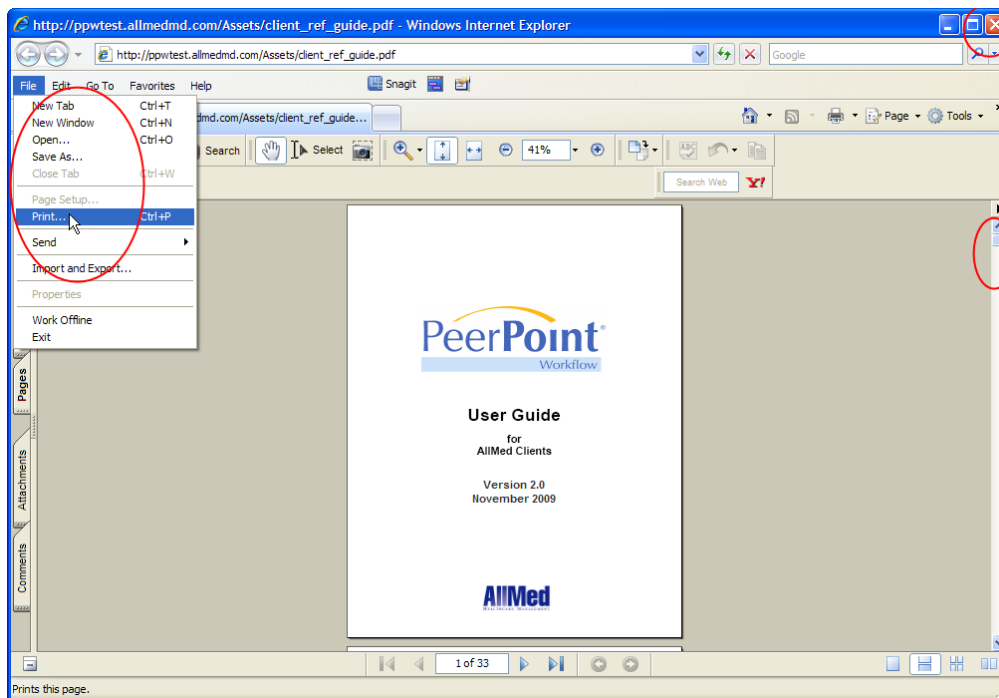
Updating your **Profile** includes changing your information, e.g., contact name, phone, fax, email, and mailing address.

Updating your **Profile** also includes being able to change your password.

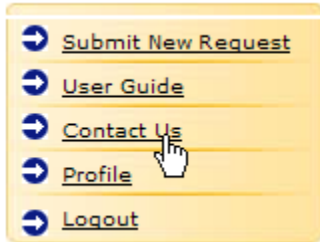
4.1 Viewing a User Guide



When you click on **User Guide**, a PDF window showing the user guide appears. Within the window, you can select from the dropdown lists, such as to print or save the user guide, or you can use the scroll bar on the right of the window to scroll the document for viewing. When you have completed what you want to do, click the button which closes the window. You will be returned to the window from which you selected **User Guide** within the yellow box.



4.2 Contacting Us

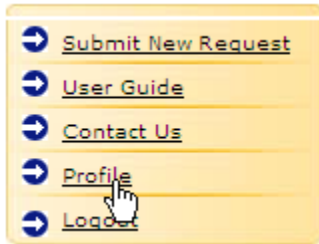


When you click on **Contact Us**, the contact page at the AllMed website appears. It provides you with the AllMed street address, toll free phone number, and fax number. It also provides a form you can use to send AllMed an email.

1. Fill in the fields of the form.
2. Click **Submit** to send the email.
3. Click the button which closes the **Contact Us** window.

You will be returned to the window from which you selected **Contact Us** within the yellow box.

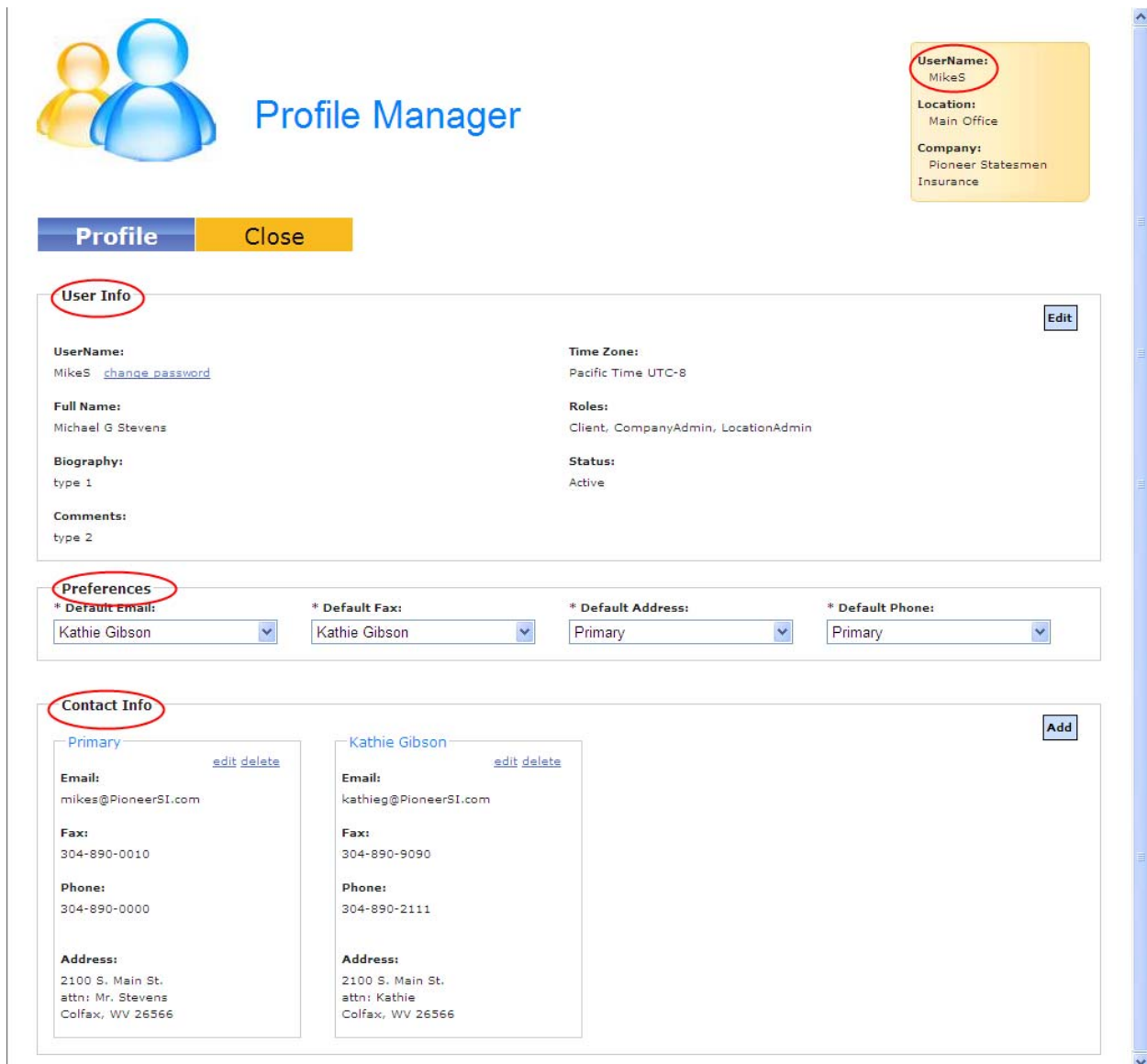
4.3 Updating Your Profile



The **Profile Manager** window includes three areas:

- **User Info.**
- **Preferences.**
- **Contact Info.**

The information displayed describes the user who has logged into **PeerPoint Workflow** with the **UserName** that is displayed.



Profile Manager

Profile **Close**

User Info Edit

UserName: MikeS [change password](#)

Time Zone: Pacific Time UTC-8

Full Name: Michael G Stevens

Roles: Client, CompanyAdmin, LocationAdmin

Biography: type 1

Status: Active

Comments: type 2

Preferences

* **Default email:** Kathie Gibson

* **Default Fax:** Kathie Gibson

* **Default Address:** Primary

* **Default Phone:** Primary

Contact Info Add

Primary [edit](#) [delete](#)

Email: mikes@PioneerSI.com

Fax: 304-890-0010

Phone: 304-890-0000

Address: 2100 S. Main St.
attn: Mr. Stevens
Colfax, WV 26566

Kathie Gibson [edit](#) [delete](#)

Email: kathieg@PioneerSI.com

Fax: 304-890-9090

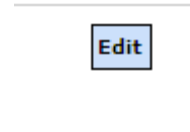
Phone: 304-890-2111

Address: 2100 S. Main St.
attn: Kathie
Colfax, WV 26566

4.3.1 User Info

You can change the **User Info** displayed except for **Roles** and **Status**, which are maintained by AllMed. The steps below describe how you change **User Info**. (Changing your password is described after that.)

1. Bring up the **Edit User Info** window by clicking on the **Edit** button at the right.
2. Enter information into the fields as needed (fields noted with an asterisk must have an entry):
 - *First Name.
 - Middle Initial.
 - *Last Name.
 - *Time Zone.
 - Biography.
 - Comments.
3. Click **OK** to save the changes or **Cancel** to leave the original **User Info** unchanged.



Edit User Info

* First Name:	Middle Initial:
<input style="width: 95%;" type="text" value="Michael"/>	<input style="width: 95%;" type="text" value="G"/>
* Last Name:	
<input style="width: 95%;" type="text" value="Stevens"/>	
* TimeZone:	
<input style="border-bottom: none;" type="text" value="Eastern Time UTC-5"/> ▼	
Biography:	
<input style="width: 95%; height: 40px;" type="text" value="Mr. Stevens joined PSIC in 2002 as Director of Insurance Services. He earned an MBA at UCLA in 1989 and worked at a major insurance"/>	
Comments:	
<input style="width: 95%; height: 30px;" type="text" value="When Mike Stevens is unavailable, Kathie Gibson is authorized to sign all documents."/>	
<input style="margin-right: 20px;" type="button" value="OK"/> <input type="button" value="Cancel"/>	

4.3.2 Changing Your Password

UserName:

MikeS [change password](#)

When you click on [change password](#), the **Change Password** window opens. The window displays the password rules so that you will be able to enter a valid password.

Change Password

Password Rules

- Passwords must contain 8 or more characters.
- Password must contain at least one letter.
- Passwords must contain at least one number.
- No character can occur three times in a row.
- You cannot reuse an old password.

* Old Password:

* New Password:

* Retype New Password:

OK **Cancel**

To change you password:

1. Type the **Old Password**.
2. Type the **New Password**.
3. Retype the new password for confirmation.
4. Click **OK** to save the new password or **Cancel** to leave the original password unchanged.

4.3.3 Preferences

You set the default entries for:

- **Email** – where AllMed will email you completed case review notifications if you select to receive the completed case reviews electronically.
- **Fax** – where AllMed will fax the completed case reviews to you if you select to receive the completed case reviews via fax.
- **Address** – where AllMed will mail or ship the completed case reviews to you if you select to receive completed case reviews via mail or shipment.
- **Phone** – the phone number AllMed will use to contact you by phone for any information needed about a case.

The **Preferences** are based upon the **Contact Info** in the bottom area of the **Profile Manager** window. You have indicated a **Primary** contact that has the **UserName** indicated on the **Profile Manager** page. You may have set up additional contacts. This is particularly useful if you work in multiple locations. The available contacts, including their name, email, fax, phone, and address are displayed in the **Contact Info** section (see “Contact Info,” on page 51).

The primary contact name and additional contact names will appear in the dropdown lists in the **Preferences** section.



1. Click to select the contact whose email address will be the **Default Email** for notification.
2. Click to select the contact whose fax number will be the **Default Fax** for receiving completed cases.
3. Click to select the contact whose address will be the **Default Address** for receiving completed cases.
4. Click to select the contact whose phone number will be the **Default Phone** for receiving phone calls about case review requests.

Note that the defaults can be overridden on a case by case basis, allowing you to use contact information other than the default values as needed.

4.3.4 Contact Info

You may edit contact information displayed in the **Contact Info** section, add new contacts, or delete contacts.

Kathie Gibson [edit](#) [delete](#)

Email:
kathieg@PioneerSI.com

Fax:
304-890-9090

Phone:
304-890-2111

Address:
2100 S. Main St.
attn: Kathie
Colfax, WV 26566

To edit a displayed contact, click on [edit](#).

1. You may edit the contact **Email, Fax, Phone, Address, City, State, or Zip**.
2. Click **OK** to save the changes or **Cancel** to leave the original contact information unchanged.

Edit Contact

*** DisplayName:**
Kathie Gibson

Email: **Fax:**

Phone:

Address:

City: **State:** **Zip:**

To add a new contact:



1. Bring up the **Add Contact** window by clicking the **Add** button.
2. Enter the required **DisplayName**.
3. Enter other, optional fields: **Email, Fax, Phone, Address, City, State, or Zip**.
4. Click **OK** to save the contact information or **Cancel** to close the **Add Contact** window without saving the new contact information.

Add Contact

*** DisplayName:**

Email: **Fax:**

Phone:

Address:

City: **State:**
▼

To delete a contact, click on [delete](#).

Geraldine [edit](#) [delete](#)

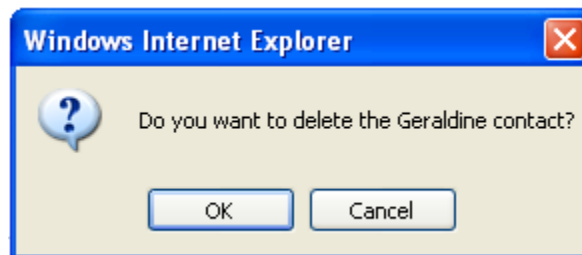
Email:
geraldinep@PioneerSI.com

Fax:
304-8909091

Phone:
304-890-0050

Address:
2100 S. Main St.
attn: Ms. Peters
Colfax, WV 26566

Click **OK** to delete the contact or **Cancel** to leave the contact in place.



To exit the **Profile Manager** window, click the **Close** button.



Profile Manager



5. Quick Start Guide

This section tells you, concisely, how to perform all basic functions. Use this **Quick Start Guide** as a handy way to get started with the things you want to do. It is arranged in question and answer format, with a reference included so you can look up more details if this **Quick Start Guide** does not answer your question completely.

Question	Answer		Ref.
How do I	Notes	Actions for You to Take	
Submit a review request?	This is easy because PeerPoint Workflow provides a Case Submission Wizard . Once you get started entering the case information, the windows open for you to fill with information, ending with the Finish button.	<ol style="list-style-type: none"> 1. At the Dashboard, click on Submit New Request. 2. Enter all Patient Information. Press Next Step. 3. Enter all Request Information. Press Next Step. 4. Enter review Questions. Press Next Step 5. Upload all Electronic Case Materials. Press Next Step. 6. Identify the Artifacts (physical items you will send to AllMed). Press Next Step. 7. Specify the Delivery Information (how you want AllMed to send the completed review to you). Press Next Step. 8. Review the request information. If it is complete and correct, press Finish. 	<p>2.1.1</p> <p>2.1.2</p> <p>2.1.3</p> <p>2.1.4</p> <p>2.1.5</p> <p>2.1.6</p> <p>2.1.7</p>
Hold back a review request already started?	Your review request has not been submitted to AllMed until you press the Finish button.	At any of Steps 3 through 8 above, press Cancel Wizard .	2.2

Question	Answer		Ref.
How do I	Notes	Actions for You to Take	
View pending case reviews?	Note that you can sort the review requests that are listed by clicking on the header you want to use for the sort, such as, Date In, Due By, or Priority.	<ol style="list-style-type: none"> 1. At the Dashboard, press Pending Reviews. 2. Click view on the line for the case for which you want to view the review request. 3. Press Close when you have finished viewing the case. 	3.1
Change a review request I have already submitted?	You can change a review request you have submitted only if it has not been started by AllMed.	<ol style="list-style-type: none"> 1. At the Dashboard, press Pending Reviews. 2. Click edit on the line of the case for which you want to change the review request. 3. Change information in the heading area of the review request or select a tab so you can change Request Info, Questions, or Materials. 4. Press Save when you are done making changes. 	3.1
View completed case reviews?	AllMed sends completed case reviews to your Inbox .	<ol style="list-style-type: none"> 1. At the Dashboard, press Inbox. 2. Click view on the line for the case for which you want to view the completed case review. 3. Press Close when you have finished viewing the case. 	3.2
View cases that were completed months ago?	Case reviews go to the Archive automatically after 30 days and remain available up to one year.	<ol style="list-style-type: none"> 1. At the Dashboard, press Archive. 2. Click view on the line for the case for which you want to view the completed case review. 3. Press Close when you have finished viewing the case review. 	3.2

Question	Answer		Ref.
How do I	Notes	Actions for You to Take	
Change contact information?	You may need to add alternate email, phone, fax, or address information.	<ol style="list-style-type: none"> 1. At the Dashboard, press Profile. 2. In the Contact Info area of the window, make any needed changes to the information that is displayed. 3. Press Close when you are done making changes. 	4.3.4
Change my password?	Rules for choosing a valid password will be displayed in the Change Password window.	<ol style="list-style-type: none"> 1. At the Dashboard, press Profile. The Profile window opens. 2. Click change password. A Change Password window opens. 3. Complete the fields and press OK. 	4.3.2