

## USERMANUAL FOR COVID CASES

### STEP 1: Patient Registration by PMAM

1. Login as PMAM where the user (PMAM) has a provision to register the patient by entering all the mandatory fields in the registration form as shown in screen shot 1.

The screenshot displays the 'Patient Registration' form within the PMJAY - Transaction Management System. The interface includes a sidebar with navigation options like 'Patients', 'Register Patient', and 'Cases Search'. The main form area is divided into several sections: 'Registration Details', 'Card Address', 'Communication Address', 'Hospital Details', and 'Referral Details'. Each section contains various input fields, dropdown menus, and checkboxes. A 'Register' button is located at the bottom right of the form. A note at the bottom states: 'Note : Registering this patient means that you have taken the patient consent as per NHA data privacy Policy and Aadhar Act in case of Biometric Verification of the patient. Click here to download , Data privacy Policy'.

**PMJAY - Transaction Management System**  
AYUSHMAN BHARAT

**national health authority**

**Patients**

- Register Patient
- Registered Patients View **14**
- Telephonic Registered Patients **0**
- Direct Registration
- OP Registered Cases **0**
- Cases Search
- Claims
- COVID
- Flagging

**Patient Registration**

State\* CHHATTISGARH ID Type\* Mobile No ID Number\* 9999999999  New Born Baby

Retrieve Reset

**Registration Details**

Name\* TEST A Gender\*  Male  Female  Transgender Contact No 9999999999

Year Of Birth 2000 Age 20 Y 0 M 0 D

**Card Address**

Address .KABIRDHAM, CHHATTISGARH State\* CHHATTISGARH District\* KABIRDHAM Block/ULB Block

Block ---select--- Village ---select--- City/Town Pin code

**Communication Address**

Address\* test State\* CHHATTISGARH District\* BALOD Block/ULB ---select---

Block ---select--- Village ---select--- City/Town Pin code\* 555555

Member Type\* Self Contact No\* 9999999999

**Hospital Details**

Hospital\* District HospitalKABIRDHAM Date of Registration\* 07-04-2020

**Referral Details**

Referred By ---select--- Referred Doctor Name

All fields marked with \* are mandatory

Action Type Register Register

Note : Registering this patient means that you have taken the patient consent as per NHA data privacy Policy and Aadhar Act in case of Biometric Verification of the patient. Click here to download , Data privacy Policy

Screen Shot 1

- On clicking 'register', a message 'patient registered successfully with registration ID' will pop up as shown in screen shot 2.



**Screen Shot 2**

## STEP 2: Preauth Initiation by Medco

- Once patient gets registered, the user (Medco) has a provision to click on a particular registration id (preauth → preauth initiation) for further processing. Here, the user needs to select the patient type as IP and enters the diagnosis details, treatment protocol and admission details as shown in screen shot 3.

**For Example**, if for COVID 19, user needs to select the speciality as 'infectious diseases' and corresponding procedures will be displayed in the drop down as (1) Test for confirmation of COVID 19 infection and (2) Screening test for COVID 19 infection. Upon selecting either of the two, investigations will be prescribed accordingly.

**Navigation:** Preauth → Preauth Initiation.

The screenshot displays the 'Preauth Initiation by Medco' interface. The interface is divided into several sections:

- Diagnosis:** Primary Diagnosis \* (Other), Diagnosis Description \* (test).
- Treatment Protocol:** A table with columns: Speciality, Procedure, Quantity, Amount(₹), Stratification, Action. The table contains one row: Infectious Diseases(ID) Screening Test for COVID-19 Infection(ID002A), 1, Please select Implant/ Stratification as applicable for populating Amount, -, and an action icon.
- Admission Details:** Initial Assessment \* (test), IP Number, Admission Type \* (Planned), Proposed Surgery/Treatment Date, Remarks, Patient Diagnosed by \* (MEDCO), Doctor Name \* (District Hospital -Kawardha MEDCO), Admission Date \* (07-04-2020).
- Procedure Consent \*:** Radio buttons for Yes and No.
- Medico Legal Case, If any \*:** Radio buttons for Yes and No.
- Action Type:** Initiate Pre-auth.
- Buttons:** Submit, Add/View Attachments, Add/View Data Anamoly Attachments.

**Note:**  
1. Please click on Stratification/Implant Icon in Action Column for updating Stratification/Implant details  
2. Total Amount will be displayed only after adding Implants / Stratification if applicable

**Note:**  
Insurance Wallet Amount: Rs.43,700  
Scheme Wallet Amount: Rs.493,700

Screen Shot 3

Once the procedure details are captured in the system by Medco, stratification details (if the selected procedure mandates the stratification) needs to be updated for the selected procedure as shown in below screen shot.

## Stratification Screen

Procedure Name	Stratification Details	Stratification Options	Action
Screening Test for COVID-19 Infection	Testing Strategy	---select--- All symptomatic individuals who have undertaken international travel in the last 14 days All symptomatic contacts of laboratory confirmed cases All symptomatic healthcare workers	Add

- Once the diagnosis details, treatment protocol and admission details are filled, Medco can 'initiate preauth' by uploading the mandatory attachments like Patient Photo & Patient ID proof and then clicks on 'initiate preauth' and submits the preauthorization request.

## Attachments Screen

PMJAY - Transaction Management System  
AYUSHMAN BHARAT

Press F11 to exit full screen

MEDCO CHH0028  
District Hospital KABIRDHAM (HS22008029)

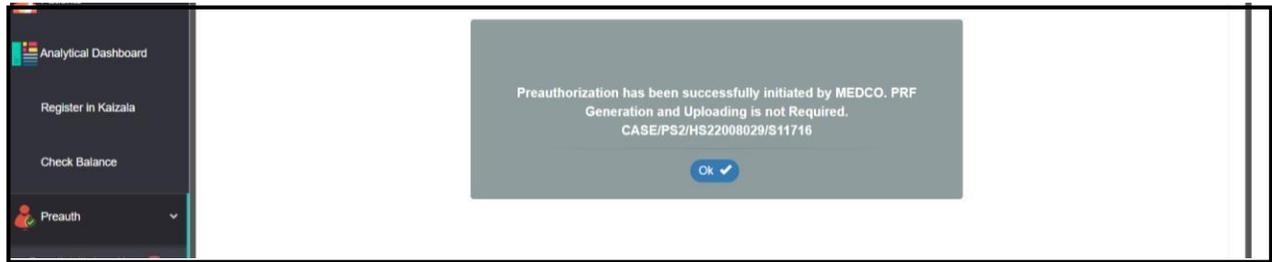
### Attachments

View All Inactive Attachments View Data Anamoly Attachments

Preauthorization

Attachment Name	View	Upload
Consent Documents		upload
DTRS		upload
Health Card		upload
Patient Id Proof *	<a href="#">Patient Id Proof</a>	upload
Patient Photo *	<a href="#">Patient Photo</a>	upload
Preauthorisation Clinical Photos		upload

- On clicking the action type as 'initiate preauth' a message 'preauthorization has been successfully initiated by Medco with Case ID' will pop up as shown in screen shot 4.



**Screen Shot 4**

### STEP 3: Preauth approval by Preauth Panel Doctor(PPD)

6. Login as preauth panel doctor(PPD) where the user (PPD) has a provision to click on appropriate 'case no' as shown in screen shot 5.

**Navigation:** COVID Tests → COVID Preauth Updation

All COVID Preauths will be displayed in a separate bucket.

The screenshot shows the PMJAY - Transaction Management System interface. The top header includes the National Health Authority logo and the system name. The left sidebar contains navigation options: Panel Doctor Status Report, Assigned Cases, Pendency, Preauth, Cases Search, Suspicious Cases, COVID Tests, Preauth Updation(COVID) (1), Covid Pendency, Claim Updation(COVID) (0), Assigned Cases(COVID), and Cases Search(COVID). The main content area is titled 'Preauth Cases For Approval' and features a search form with fields for Case Number, Card Number, Category, Procedure Name, Registered From Date, and Registered To Date. Below the search form is a table with one record:

S.No	Case No	Claim No	Patient Name	Card No	Case Status	Hospital Name	Registered Date
1	<a href="#">CASE/HS22011221/S6316</a>	TRUST/DUR/2020/3783677/1	TEST ADD MATCH SCORE	PEIWN1WX	PPD Pending Updated by Medco	aaarogya hospital	02/07/2019

**Screen Shot 5**

7. Upon clicking the 'case no.', the user has a provision to either approve/reject/raise query/send for field verification/assign the case as shown in screen shot 6.



#### STEP 4: Claim Initiation by Medco

- Once the preauthorization request is approved by PPD, Medco has a provision to select the COVID case and raise a claim by bypassing the discharge process as shown in screen shot 8.

Navigation: COVID Tests → COVID Claim Initiation

The screenshot displays the PMJAY - Transaction Management System interface. The header includes the National Health Authority logo and the system name. The left sidebar contains navigation options: Check Wallet, Patients, Analytical Dashboard, Register in Kaizala, Preauth, Cases Search, Payments, Claims, COVID Tests, Claim Initiation(COVID) (with a red notification badge '2'), and Preauth Query. The main content area is titled 'Covid Claim Cases For Initiation' and features a search form with fields for Case Number, Card Number, Category, Procedure Name, Registered From Date, Registered To Date, and State (set to CHHATTISGARH). Below the form is a table with 7 columns: S.No, Case No, Claim No, Patient Name, Case Status, Hospital Name, and Registered Date. The table contains two records. A footer note reads 'javascript:fn\_casesForApprovalClaimCovid()'. A small purple chat icon is visible in the bottom right corner.

S.No	Case No	Claim No	Patient Name	Case Status	Hospital Name	Registered Date
1	CASE/PS2/HS22008029/NP7859	TRUST/BAS/2020/3743680/1	dhakd	PPD Approve	District HospitalKABIRDHAM	09/04/2020
2	CASE/PS2/HS22008029/S7861	TRUST/JAN/2020/3793681/1	tesrthree	Procedure Auto Approved	District HospitalKABIRDHAM	10/04/2020

Screen Shot 8

- On clicking a particular 'case no.' Medco has a provision to enter the covid details i.e., report status as positive/negative, treatment date & time, name of the lab that conducted the test and attachment with the copy of the report from the accredited lab as shown in screen shot 9. Once the mandatory details are given, Medco can initiate claim.

### Screen Shot 9

In Covid Details table, user has to select the “Report Status” as Positive /Negative.

- If the Procedure selected during Preauthorization is “Screening test for COVID 19 infection” and “Report Status” is “Positive” then MEDCO should enter the details of immediate “Confirmed Report Status” as shown in following figure 10
- If the Procedure selected during Preauthorization is “Test for confirmation of COVID 19 infection” and “Report Status” is “Negative ” then MEDCO can continue with the “Treatment Date , “Name of Laboratory and Attachments to initiate Claim

The screenshot displays the PMJAY - Transaction Management System interface. The top navigation bar includes the National Health Authority logo, the system name 'PMJAY - Transaction Management System', and the user's name 'MEDCO CHH0028' with a dropdown menu. The main content area is divided into two sections: 'Claim Details' and 'Covid Details'.

**Claim Details:**

Preauth Approved Amount(Rs.): 1815	Preauth Date: 09/04/2020 23:08:22 PM	Claim Submitted Date: -	Last Claim Updated Date: 10/04/2020 04:40:51 AM
Penalty Amount(Rs.): 0	Claim Amount(Rs.): 1815	Bill Amount(Rs.): 1815	Bill Date:

Remarks:

**Covid Details:**

Report Status* <input checked="" type="radio"/> Positive <input type="radio"/> Negative	Treatment Date*	Name Of the Laboratory*	Attach Screening Report <a href="#">Browse</a>
Confirmed Report Status* <input type="radio"/> Positive <input type="radio"/> Negative	Attach Confirmation Test Report <a href="#">Browse</a>		

Action Type  
Select

**Screen Shot 10**

Upon entering all the mandatory fields, Medco can initiate claim. On clicking 'initiate claim', a message 'claim has been successfully initiated by Medco' shall be displayed.

**STEP 5: Claim Forwarded by Claim Executive (Cex)**

11. Login as claim executive (Cex) where the user (Cex) has a provision to click on appropriate 'case no' as shown in screen shot 11.

**Navigation:** COVID Tests → COVID Claim Updation

The screenshot displays the PMJAY Transaction Management System interface. The header includes the National Health Authority logo and the system name. The left sidebar shows navigation options for Claims and COVID, with 'COVID Claim Updation' selected. The main content area is titled 'Covid Claim Cases For Approval' and contains a search form with fields for Case Number, Card Number, Category, Procedure Name, Registered From Date, and Registered To Date. Below the form is a table of records.

S.No	Case No	Claim No	Patient Name	Card No	Case Status	Hospital Name	Registered Date	Claim Initiated Amount (Rs.)
1	CASE/PS2/HS22008029/NP11709	TRUST/BAS/2020/3744949/1	bhguk	NA	Claim initiated by Medco(Insurance)	District HospitalKABIRDHAM	07/04/2020	1650
2	CASE/PS2/HS22008029/S11716	TRUST/KAB/2020/3824955/1	TEST A	PC5G7V9Q	Claim initiated by Medco(Insurance)	District HospitalKABIRDHAM	07/04/2020	1650

**Screen Shot 11**

12. On clicking a particular 'case no.' the user(Cex) has a provision to fill the non-technical checklist and clicks on 'forward' as shown in screen shot 12.

**national health authority** | **PMJAY - Transaction Management System** | AYUSHMAN BHARAT | CEX-Insurer: CHH003485

**Claims** | **COVID** | COVID Claim Update 2

**Claim Details**

Preauth Approved Amount(Rs.): 1650	Preauth Date: 07/04/2020 18:59:00 PM	Claim Submitted Date: 07/04/2020 19:08:15 PM	Last Claim Updated Date: 07/04/2020 19:08:15 PM
Penalty Amount(Rs.): 0	Claim Amount(Rs.): 1650	Bill Amount(Rs.): 1650	Bill Date:

Remarks:

**Non Technical CheckList**

1) Name in Case Sheet and Consent Forms is Correct \*  Yes  No

2) Gender in Case Sheet and Consent Forms is Correct \*  Yes  No

3) Is Beneficiary Card Photo is Matching with Discharge Photo and Onbed Photo \*  Yes  No

**Date Verification**

Admission Date *	Online 07-04-2020	Case Sheet 07-04-2020	<input checked="" type="radio"/> Yes <input type="radio"/> No
Surgery/Therapy Date *	Online	Case Sheet 07-04-2020	<input type="radio"/> Yes <input checked="" type="radio"/> No
Discharge/Death Date *	Online 07-04-2020	Case Sheet 07-04-2020	<input checked="" type="radio"/> Yes <input type="radio"/> No

**Document Verification**

1) Patient/Attendant Signature is Matching across two Forms (Counseling Form and Consent Letter) \*  Yes  No

2) Reports are Signed by Doctors with Registration Number \*  Yes  No

3) Dates and Patient Name are Correctly Stated on the Reports \*  Yes  No

Remarks:

**COVID WORKFLOW DETAIL**

Report Status	Treatment Date and Time	Laboratory Name	Attachments
Positive	2020-04-07 05:04	test	S11716

**Work Flow**

S No	Date & Time	Name	Remarks	Action	Approved Amount(Rs.)	Reasons
1	07/04/2020 19:08:15	District Hospital -Kawardha MEDCO(MEDCO)	NA	Claim Initiated by Medco(Insurance)	1650.0	NA

Action Type: Forward

**Submit**

Insurance Wallet Amount: Rs 43,700  
Scheme Wallet Amount: Rs 493,700

**Screen Shot 12**

13. On clicking 'forward', a message 'claim has been forwarded to CPD' will pop up as shown in screen shot 13.

**COVID** | COVID Claim Update 2

Past Claim History | Preauthorization | **Claims** | Attachments | Flag | Questionnaire

Claim has been Forwarded to CPD

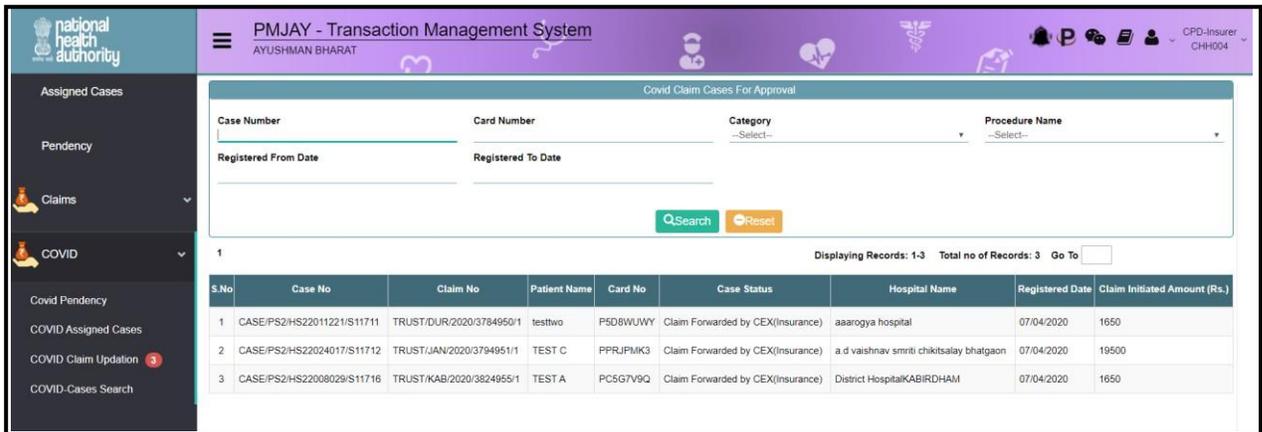
**OK**

**Screen Shot 13**

## STEP 6: Claim Processing by Claim Panel Doctor (CPD)

1. Login as claim panel doctor (CPD) where the user(CPD) has a provision to click on a particular 'case no' as shown in screen shot 14. Here the user(CPD) has a provision to either approve/reject/raise query/send for field verification/assign the case.

**Navigation:** COVID Tests → COVID Claim Updation



The screenshot displays the PMJAY - Transaction Management System interface. The header includes the National Health Authority logo and the system name. The left sidebar contains navigation options: Assigned Cases, Pendency, Claims, COVID, Covid Pendency, COVID Assigned Cases, COVID Claim Updation (with a red notification badge), and COVID-Cases Search. The main content area is titled 'Covid Claim Cases For Approval' and features a search form with fields for Case Number, Card Number, Category, Procedure Name, Registered From Date, and Registered To Date. Below the search form, there is a table displaying three records. The table has columns for S.No, Case No, Claim No, Patient Name, Card No, Case Status, Hospital Name, Registered Date, and Claim Initiated Amount (Rs.).

S.No	Case No	Claim No	Patient Name	Card No	Case Status	Hospital Name	Registered Date	Claim Initiated Amount (Rs.)
1	CASE/PS2/HS22011221/S/11711	TRUST/DUR/2020/3784950/1	testtwo	P508WUWY	Claim Forwarded by CEX(Insurance)	aaarogya hospital	07/04/2020	1650
2	CASE/PS2/HS22024017/S/11712	TRUST/JAN/2020/3794951/1	TEST C	PPRJPMK3	Claim Forwarded by CEX(Insurance)	a d vaishnav smriti chikitsalay bhatgaon	07/04/2020	19500
3	CASE/PS2/HS22008029/S/11716	TRUST/KAB/2020/3824955/1	TEST A	PC5G7V9Q	Claim Forwarded by CEX(Insurance)	District HospitalKABIRDHAM	07/04/2020	1650

**Screen Shot 14**

14. On clicking a particular 'case no.' the user(CPD) has a provision to fill the technical checklist and clicks on 'approve' as shown in screen shot 15.

The screenshot displays the PMJAY - Transaction Management System interface. The header includes the National Health Authority logo and the user profile 'CPD-Insurer CHH004'. The left sidebar contains navigation options: Assigned Cases, Pendency, Claims, COVID, Covid Pendency, COVID Assigned Cases, COVID Claim Update (3), and COVID-Cases Search.

The main content area is divided into several sections:

- Claim Details:** Shows 'Total Claim(Rs.)' as 1650 and 'Final Approved Amount(Rs.)' as 1650.
- Non Technical CheckList:** A section for non-technical checks.
- Technical (Specialist) CheckList:** A section for technical checks with four items:
  - 1) Diagnosis is Supported by Evidence \* (Yes/No)
  - 2) Case Management Proven to be done as per the Standard Treatment Protocols \* (Yes/No)
  - 3) Evidence of the Therapy being Conducted exists beyond Doubt \* (Yes/No)
  - 4) Mandatory Reports are Attached \* (Yes/No)
- Special Case:** Set to 'NA'.
- Remarks:** A text area for additional notes.
- COVID WORKFLOW DETAIL:** A table showing report status (Positive), treatment date (2020-04-07 05:04), laboratory name (test), and attachments (S11716).
- Work Flow:** A table with columns: S No, Date & Time, Name, Remarks, Action, Approved Amount(Rs.), and Reasons. It shows two steps:
 

S No	Date & Time	Name	Remarks	Action	Approved Amount(Rs.)	Reasons
1	07/04/2020 19:08:15	District Hospital -Kawardha MEDCO(MEDCO)	NA	Claim Initiated by Medco(Insurance)	1650.0	NA
2	07/04/2020 19:14:38	CEX Insurer(CEX)	NA	Claim Forwarded by CEX(Insurance)	1650.0	NA
- Action Type:** Set to 'Approve'.
- Submit:** A green button to confirm the action.
- Insurance Wallet Amount:** Rs. 43,700
- Scheme Wallet Amount:** Rs. 493,700

Screen Shot 15

15. On clicking 'approve, a message 'claim has been approved by CPD' will pop up as shown in screen shot 16.

This screenshot shows the same interface as Screen Shot 15, but with a confirmation message box overlaid. The message box contains the text 'Claim has been Approved by CPD' and an 'OK' button. The background interface is dimmed, showing the 'Claims' menu item in the sidebar and the 'Claims' tab selected in the top navigation bar.

Screen Shot 16

## STEP 7: Claim Processing by Accounts Officer (ACO)

16. Login as accounts officer (ACO) where the user (ACO) has a provision enter remarks and clicks on either approve/reject/raise query as shown in screen shot 17.

**Navigation:** COVID Tests → COVID Claim Updation

The screenshot displays the PMJAY - Transaction Management System interface. The top header includes the National Health Authority logo and the system name. The left sidebar contains navigation options such as Assigned Cases, Pendency, Payments, Claims, COVID, and MIS. The main content area shows the 'COVID Claim Updation' form. The 'ACO Remarks' section is expanded, showing a 'Final Approved Amount(Rs.)' of 3000.0 and a 'Remarks' field containing 'Approved'. Below this, the 'COVID WORKFLOW DETAIL' section shows a 'Report Status' of 'Positive', a 'Treatment Date and Time' of '2020-04-07 22:16', a 'Laboratory Name' of 'testing', and 'Attachments' of 'S11713'. The 'Work Flow' table lists three steps:

S.No	Date & Time	Name	Remarks	Action	Approved Amount(Rs.)	Reasons
1	07/04/2020 17:23:45	a d vaishnav smriti chikitsalay bhatgaon MEDCO(MEDCO)	test	Claim Initiated by Medco(Insurance)	3000.0	NA
2	07/04/2020 17:29:31	CEX Insurer(CEX)	test	Claim Forwarded by CEX(Insurance)	3000.0	NA
3	07/04/2020 18:27:32	Chhattisgarh CPD-INS(CPD-INSURER)	ok	CPD Insurer Approved(Insurance)	3000.0	NA

Below the table, the 'Action Type' is set to 'Approve', and a 'Submit' button is visible. At the bottom, the 'Insurance Wallet Amount' is Rs. 30,500 and the 'Scheme Wallet Amount' is Rs. 475,550.

Screen Shot 17

17. On clicking 'approve, a message 'claim has been approved by ACO' will pop up as shown in screen shot 18.

The screenshot shows a confirmation message box overlaid on the 'COVID Claim Updation' form. The message box contains the text 'Claim has been approved by ACO' and an 'OK' button. The background form shows the 'Remarks' field with the value 'test'.

Screen Shot 18

## STEP 8: Claim Processing by SHA

18. Login as SHA where the user has a provision to approve/reject/raise query the case. Once the user approve the case,that would be the final approval as shown in screen shot 19.

**Navigation:** COVID Tests → COVID Claim Update

The screenshot displays the PMJAY - Transaction Management System interface. The left sidebar contains navigation options: Admin Tools, Assigned Cases, Pendency, Preauth, Cases Search, Payments, Claims, COVID, COVID Claims with out Bank AIC (0), COVID Claim Update (1), Covid Pendency, COVID Assigned Cases, COVID Cases Search, and Terminated Cases. The main content area shows the 'COVID WORKFLOW DETAIL' section with the following data:

Report Status	Treatment Date and Time	Laboratory Name	Attachments
Positive	2020-04-07 22:16	testing	S11713

Below this is the 'Work Flow' table:

S.No	Date & Time	Name	Remarks	Action	Approved Amount(Rs.)	Reasons
1	07/04/2020 17:23:45	a d vaishnav smriti chikitsalay bhatgaon MEDCO(MEDCO)	test	Claim Initiated by Medco(Insurance)	3000.0	NA
2	07/04/2020 17:29:31	CEX Insurer(CEX)	test	Claim Forwarded by CEX(Insurance)	3000.0	NA
3	07/04/2020 18:27:32	Chhattisgarh CPD-INS(CPD-INSURER)	ok	CPD Insurer Approved(Insurance)	3000.0	NA
4	07/04/2020 21:20:39	aco insurer(ACO-INSURER)	NA	Claim Forwarded by ACO Insurer(Insurance)	3000.0	NA

The 'Action Type' is set to 'Approve'. A 'Submit' button is visible at the bottom.

19. On clicking 'approve', a message 'claim has been approved by SHA successfully' will pop up as shown in screen shot 20.

The screenshot shows a success message pop-up: 'Claim has been Approved by SHA successfully'. The background interface shows the 'Claims' tab selected in the top navigation bar, with other tabs like 'Past Claim History', 'Preauthorization', 'Attachments', 'Flag', and 'Questionnaire'. The pop-up has an 'OK' button.

**Screen Shot 20**