



**Purpose:** Step-by-step instructions for IROs on how to use the ODI External Review System

**Contact:** For assistance, you may contact the ODI External Review Program Administrator at [External.Review@insurance.ohio.gov](mailto:External.Review@insurance.ohio.gov) or (614) 644-0188.

**Introduction:** *Salesforce supports Microsoft Internet Explorer (IE) 9+, Microsoft Edge, Firefox, and Chrome. The browser preferred by Salesforce is Chrome.*

*The External Review System is a secure ODI Gateway application. Users must register for an ODI Gateway account to access this application.*

*ODI Gateway location: <https://gateway.insurance.ohio.gov>.*

*ODI takes our responsibility to safeguard user data seriously. As such, ODI reserves the right to verify information submitted and, if the account is for business purposes, to verify the requestor's authorization to perform the functions inherent to the application access requested. This is true for initial account requests and/or upgrade requests.*

*All Figures in this guide are for illustrative purposes only and do not represent any actual External Review case information.*

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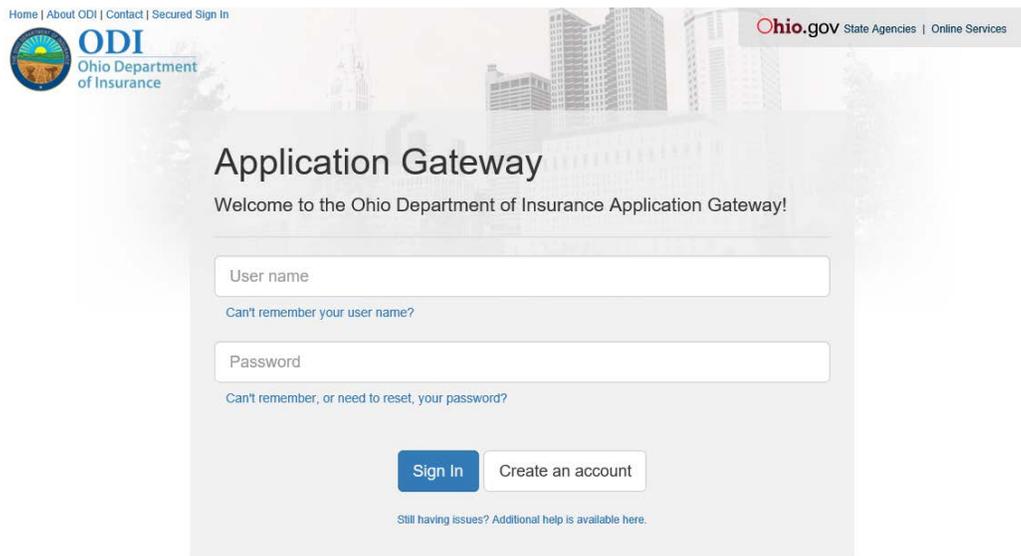
# Sign In

## Step 1:

### Important

Before starting this process, make sure you have registered for access through the ODI Gateway. (See "[Creating a New ODI Gateway Account for Access to the External Review System Applications](#)" and "[Requesting New Access to External Review System Applications in the ODI Gateway](#)").

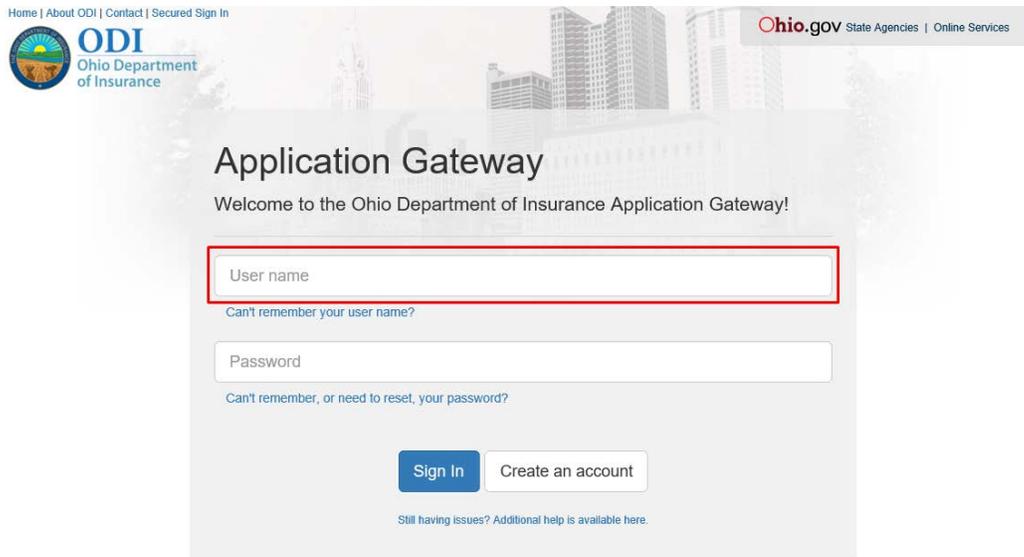
Open a browser and navigate to the Gateway location (<https://gateway.insurance.ohio.gov>). The screen will look like Figure 1 below.



The screenshot shows the login page for the Ohio Department of Insurance Application Gateway. At the top left, there is a navigation menu with links for Home, About ODI, Contact, and Secured Sign In. The ODI logo (Ohio Department of Insurance) is displayed next to the navigation menu. At the top right, there is a link for Ohio.gov State Agencies | Online Services. The main heading is "Application Gateway" with a subtitle "Welcome to the Ohio Department of Insurance Application Gateway!". Below this, there are two input fields: "User name" and "Password". Under the "User name" field, there is a link "Can't remember your user name?". Under the "Password" field, there is a link "Can't remember, or need to reset, your password?". At the bottom of the form, there are two buttons: "Sign In" and "Create an account". At the very bottom, there is a link "Still having issues? Additional help is available here."

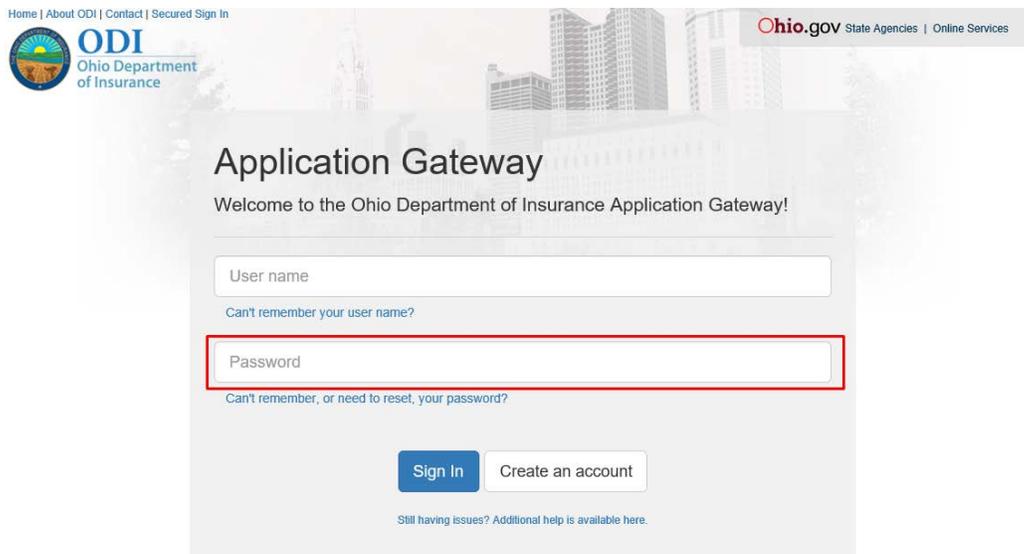
**Figure 1.** Login page for the application gateway.

**Step 2:** Click the **User name** box (*Figure 2*) and type in the user name you used to create your ODI External Review account. You received your user name by email after you created your account. *If you cannot remember your user name, click the “Can’t remember your user name?” text below the User name field. You will need to provide the email address associated with your account to have your user name emailed to you.*



**Figure 2.** Login page for the application gateway highlighting the User name box.

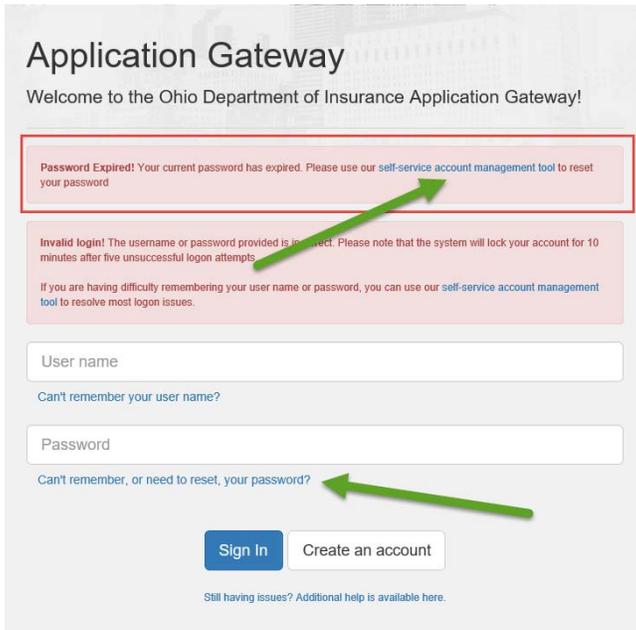
**Step 3:** Click the **Password** box (*Figure 3*) and enter the password you used when setting up your ODI External Review account. *If you cannot remember your password, click the “Can’t remember, or need to reset, your password?” text below the field. You will need to provide the User name associated with the account and answer a security question to reset your password.*



**Figure 3.** Login page for the application gateway highlighting the Password box.

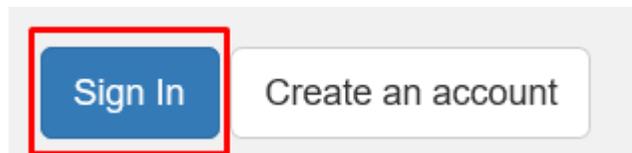
Your password will automatically expire after 90 days. To avoid any issues during non-business hours, you should make a note of when your password is going to expire and manually change it before the expiration date. You can reset your password by clicking **“Can’t remember, or need to reset, your password?”** under the Password box (**Figure 4**).

When you sign in after 90 days, you will see a password expired message. Click **“self-service account management tool”** in the top box to reset your password.



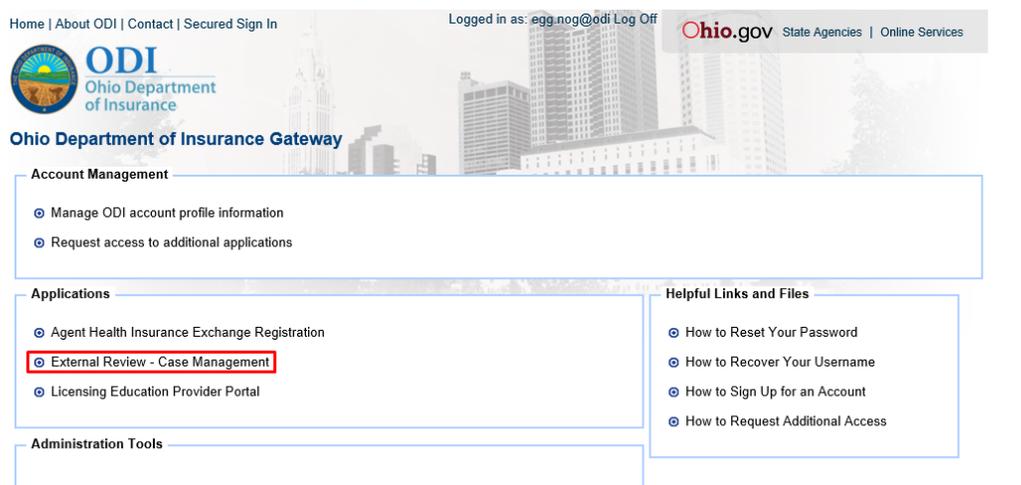
**Figure 4.** Login page when your password has expired.

**Step 4:** Click **“Sign In”** in the center of the screen (Figure 5).



**Figure 5.** Login page for the application gateway highlighting “Sign In.”

**Step 5:** In the Applications box (Figure 6), click “**External Review – Case Management.**”



**Figure 6.** ODI Gateway highlighting the External Review application selection.

**Step 6:** This is your Home page. On this page (Figure 7), you can see external review cases currently assigned to your IRO for review. You can return to this page at any time by clicking “**HOME**” in the menu bar.

Cases displayed on your Home page are organized by case review status:

- “**CASES PENDING IRO ACCEPTANCE**” – The case has been assigned to your IRO for review and has not been rejected by your IRO. The case is pending rejection or acceptance for review by your IRO.
- “**CASES PENDING IRO OUTCOME REPORTING**” – The case has been accepted by your IRO. The case is pending outcome reporting of the review decision by your IRO.
- “**CASES PENDING HPI OUTCOME REPORTING**” – Your IRO has completed the review and reported a review decision in the External Review system. The case is pending HPI outcome data reporting.
- “**CASES PENDING ODI CLOSURE**” – Both your IRO and the HPI have submitted outcome reporting. The case is pending final review and closure by the ODI External Review Program Administrator.

External Review System			
HOME	CLOSED CASES	HELP	
<b>CASES PENDING IRO OUTCOME REPORTING</b>			
OUTCOME DUE DATE	CASE NUMBER	PATIENT NAME (LAST, FIRST MI)	HEALTH PLAN ISSUER (HPI)
4/18/2018 3:10 PM	120505	Thomas, Sara P	AETNA HEALTH INC (PA)
4/20/2018 2:00 AM	120482	Wells, Lawrence	SEQUENT MIDWEST BUSINESS HEALTH FUND
4/21/2018 1:05 AM	120508	Strong, Tom	BALBOA INSURANCE COMPANY
<b>CASES PENDING HPI OUTCOME REPORTING</b>			
CASE NUMBER	PATIENT NAME (LAST, FIRST MI)	HEALTH PLAN ISSUER (HPI)	
120522	Myers, Jake	SEQUENT MIDWEST BUSINESS HEALTH FUND	
<b>CASES PENDING ODI CLOSURE</b>			
CASE NUMBER	PATIENT NAME (LAST, FIRST MI)		
120481	Jai, Tommy		

**Figure 7.** Home page showing cases assigned to your IRO for review.

**Step 7:** When a case is closed by ODI, it will no longer display on the Home page. All cases closed by ODI will display on the Closed Cases page.

To view cases closed by ODI click **“CLOSED CASES”** on the menu bar ODI (Figure 8).

External Review System				
HOME	CLOSED CASES	HELP		
<b>CLOSED CASES</b>				
<i>Click a heading to change the sort order.</i>				
CASE NUMBER ↑	PATIENT NAME (LAST, FIRST MI)	REVIEWER DECISION DATE/TIME	REVIEWER OUTCOME	
1 120481	Jai, Tommy	5/22/2018 12:15 AM	Upheld	

**Figure 8.** Closed Cases page showing cases assigned to your IRO that ODI has closed.

**Step 8:** From the Home page, click a case number to view the Case Details page for that case (Figure 9). The case number corresponds to the case number listed in the email you received when ODI assigned the case to your IRO for review.

The screenshot shows the 'External Review System' interface. At the top, there are navigation links for 'HOME' and 'CLOSED CASES'. The main content area displays the case details for case number 120370. At the top right, there are two buttons: 'Reject This Case' and 'Accept This Case'. The case information includes the patient name 'Simmons, Dan' and the case status 'IRO Assigned'. Below this, there are two columns of details. The left column lists 'Case Details' such as Case Number, Patient Name, Requested By, Review Type, Type of Adverse Determination, Medical Adverse Determination Reason, Primary Specialty Type, Other Specialty Type, Previously a Contractual Case?, and Previous ODI Contractual Review Case #. The right column lists 'Assigned IRO Information' such as Outcome Due Date, Request Received Date/Time, Case Submit Date/Time, Contract Effective Date, Patient Coverage Effective Date, Health Insurance Market, Exchange Status, Student Plan/Short Term Major Medical, Student Health Plan, Provider Network Plan Type, and Health Plan Issuer Internal Tracking #. At the bottom, there is a section for 'Assigned IRO Information' with fields for Assigned Reviewer, Assigned Reviewer Phone, Assigned Reviewer Email, and Assigned Reviewer 24 Hour Phone.

**Figure 9.** Case Details page.

This page displays the Case Details, Assigned IRO Information, and the Health Plan Issuer (HPI) information.

Cases assigned to your IRO for review should be evaluated and confirmed as “Accepted” or “Rejected” as quickly as possible after assignment. For Expedited review cases, this action should take place immediately upon determination by the assigned IRO that a reviewer in the required medical specialty is not available to complete the review within the statutory timeframe.

If your IRO is unable to review the case, click “**Reject This Case**” in the top right. Enter the reason for the rejection in the “**Conflict Description**” box and click “**Save.**”

The screenshot shows a pop-up window titled 'Enter Reason for Rejecting this case'. The window has a white background and a grey border. At the top right, there are two buttons: 'Reject This Case' and 'Accept This Case'. Below the title, there is a text input field labeled '\* Conflict Description'. At the bottom of the window, there are two buttons: 'Cancel' and 'Save'. The background of the main page is visible through the pop-up, showing the case details page.

**Figure 10.** Reject case pop-up screen

The case is automatically removed from your IRO account in the system and will no longer display on your Home page. The system will automatically reassign the case to another IRO. There is no need to notify ODI when you reject a case.

To accept a case for review, click **“Accept This Case”** and then click **“Confirm”** on the pop-up confirmation screen.



**Figure 11.** Accept Case confirmation pop-up screen

You will automatically be redirected to your Home page.

## Review Decision Outcome Reporting

Step 1:

### Important

**You must upload the review decision narrative report for this case before you complete and submit outcome report data. The ability to upload documents will not be available after you submit the outcome report data.**

To start your outcome reporting, click the case number on the Home page to go to the Case Details page for that case (Figure 12).

External Review System

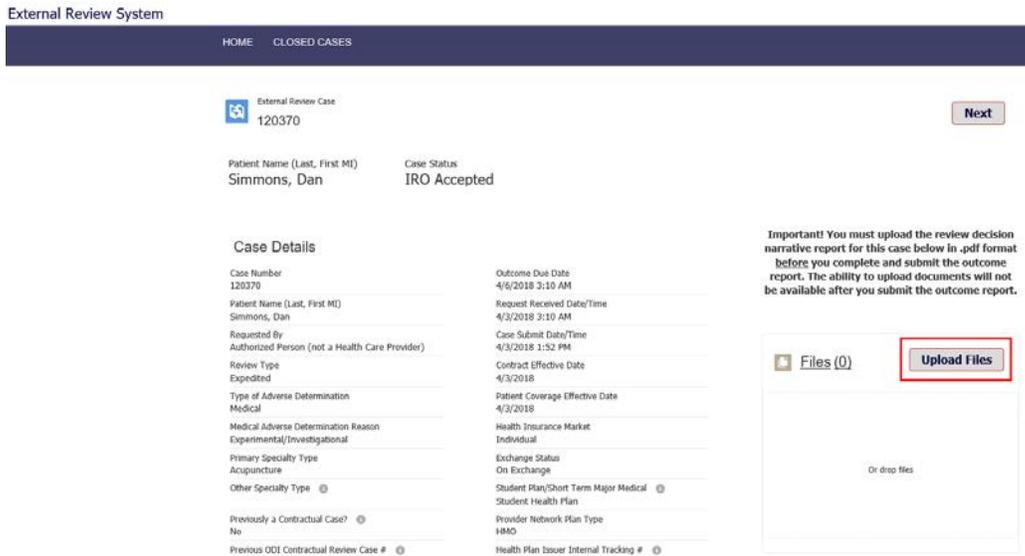
HOME CLOSED CASES HELP

CASES PENDING IRO OUTCOME REPORTING

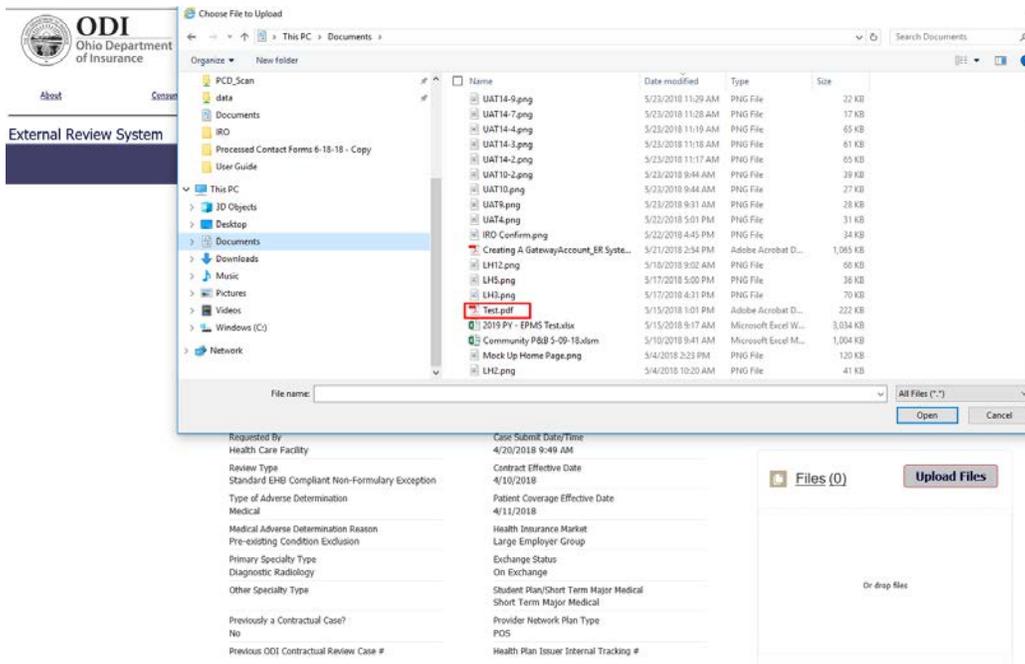
OUTCOME DUE DATE	CASE NUMBER	PATIENT NAME (LAST, FIRST MI)	HEALTH PLAN ISSUER (HPI)
4/18/2018 3:10 PM	120505	Thomas, Sara P	AETNA HEALTH INC (PA)
4/20/2018 2:00 AM	120492	Wells, Lawrence	SEQUENT MIDWEST BUSINESS HEALTH FUND
4/21/2018 1:05 AM	120508	Simmons, Dan	BALBOA INSURANCE COMPANY

**Figure 12.** Home page highlighting a case number for a case that is waiting for IRO outcome reporting.

**Step 2:** To upload your review decision narrative report, click **“Upload Files”** on the right side of the screen (Figure 13). All documents must be uploaded to the system in searchable PDF format. Navigate to the location of the searchable PDF version of the document on your computer and double click the file you want to upload (Figure 14). The document will upload.

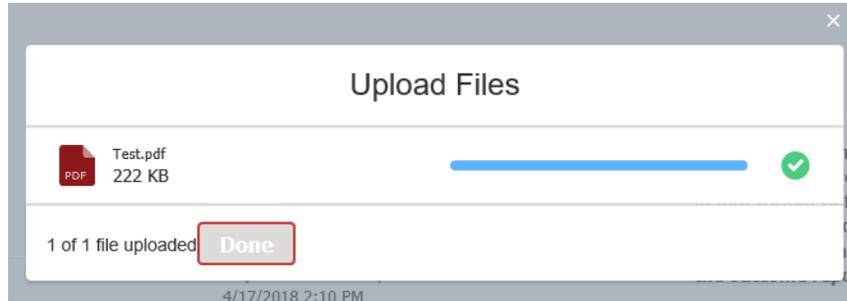


**Figure 13.** Case Details page highlighting Upload Files.



**Figure 14.** Example of document Upload selection.

**Step 3:** When the document upload has finished, click “**Done**” on the pop-up screen (Figure 15)

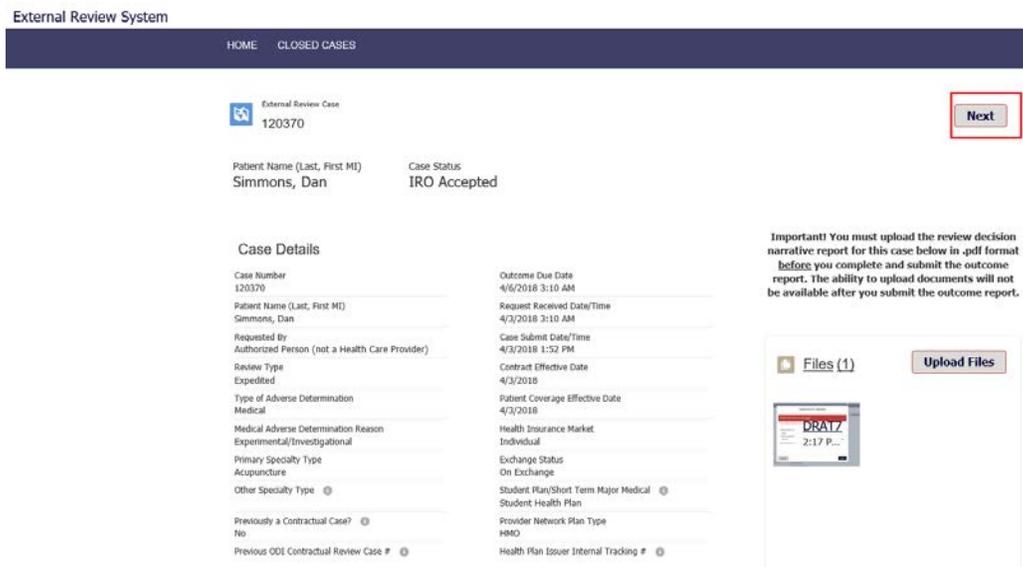


**Figure 15.** Upload Files pop-up screen when a document has finished uploading.

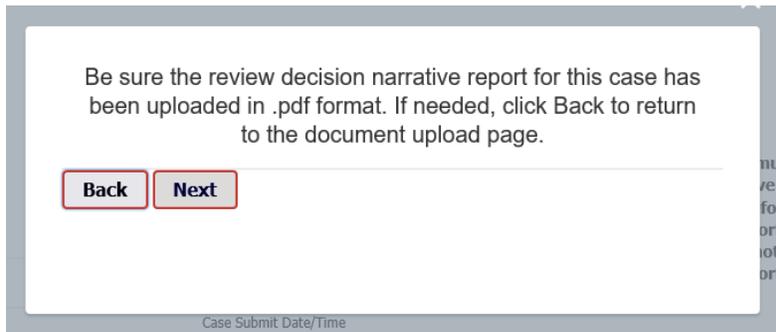
### Important

**Once you complete your outcome reporting, you will be unable to view or modify uploaded documents. If corrections need to be made to uploaded documents or outcome reporting data after outcome reporting is completed, you will have to contact ODI to reopen the case.**

**Step 4:** After submitting your review decision narrative report, click “**Next**” (Figure 16). A pop-up screen will ask you to confirm that you have uploaded your report (Figure 17).



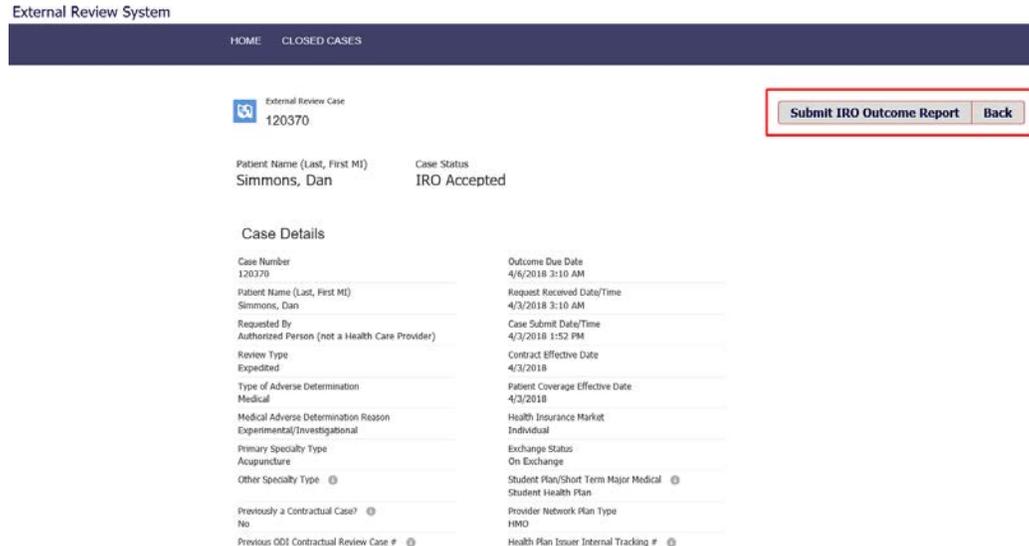
**Figure 16.** Case details page highlighting Next.



**Figure 17.** Decision narrative report submission confirmation pop-up screen.

If you need to return to the Upload screen, click **“Back.”** Otherwise, click **“Next”** to continue.

Click **“Submit IRO Outcome Report”** in the top right (Figure 18) to report your outcome data. If you need to return to the upload files page, click **“Back.”**



**Figure 18.** Case Details page highlighting Submit IRO Outcome Report.

**Step 5:** On the outcome reporting screen (Figure 19), enter all required outcome data (fields marked with a red \*). See **Table 1** below for an explanation of each field.

**Figure 19.** IRO Outcome Reporting

**Table 1.** Submit IRO Outcome Report

Field	Steps
<b>Reviewer Outcome*</b>	Select the review decision from the following options: <ul style="list-style-type: none"> <li><input type="radio"/> Upheld</li> <li><input type="radio"/> Reversed</li> <li><input type="radio"/> Reversed in Part</li> <li><input type="radio"/> Reversed by Insurer</li> <li><input type="radio"/> Void-No Review/Decision</li> </ul>
<b>Number of Reviewers*</b>	Enter the number of reviewers.
<b>Reviewer Specialty*</b>	Select the specialty of the medical reviewer from the drop-down options.
<b>Cost of Review*</b>	Enter the cost of the review.
<b>Date Documents Received from the HPI*</b>	Using the pop-up calendar tool, select the date you received the case documents from the HPI.
<b>Time Documents Received from the HPI*</b>	Select the time (to the nearest 5 minutes) you received the documents from the HPI.
<b>Reviewer Decision Date*</b>	Using the pop-up calendar tool, select the date your organization made its review decision.
<b>Reviewer Decision Time*</b>	Select the time (to the nearest 5 minutes) your organization made its review decision.
<b>Reviewer Comments</b>	Optionally, enter comments.

**Step 6:** After entering all required data fields (fields marked with a red \*), click **“Save”** to submit your outcome report (Figure 20). Your outcome reporting is finished.

**Figure 20.** IRO outcome reporting with all required fields completed.

You can click **“HOME”** on the menu bar to return to your Home page (Figure 21).

Case Number	Outcome Due Date
120370	4/6/2018 3:10 AM
Patient Name (Last, First MI)	Request Received Date/Time
Simmons, Dan	4/3/2018 3:10 AM
Requested By	Case Submit Date/Time
Authorized Person (not a Health Care Provider)	4/3/2018 1:52 PM
Review Type	Contract Effective Date
Expedited	4/3/2018
Type of Adverse Determination	Patient Coverage Effective Date
Medical	4/3/2018
Medical Adverse Determination Reason	Health Insurance Market
Experimental/Investigational	Individual
Primary Specialty Type	Exchange Status
Acupuncture	On Exchange
Other Specialty Type	Student Plan/Short Term Major Medical
	Student Health Plan
Previously a Contractual Case?	Provider Network Plan Type
No	HMO
Previous ODI Contractual Review Case #	Health Plan Issuer Internal Tracking #

**Figure 21.** Case Details page highlighting HOME page menu selection.

## Technical Tips

### Technical Tips

- > Your Home page and/or Closed Cases page may not automatically refresh. Without refreshing, updates may not display properly for cases that have changed status since you logged-in. If you are encountering this issue, try refreshing your browser before continuing.
- > Ensure all documents uploaded are in readable PDF format. Do not upload documents in scanned image or picture formats.
- > If outcome data needs to be corrected after outcome reporting is completed, contact the ODI External Review Program Administrator at [External.Review@insurance.ohio.gov](mailto:External.Review@insurance.ohio.gov) or (614) 644-0188 for assistance.

## Additional Contact Information

If you need further assistance with ODI Gateway account issues, please contact [GatewayAdmin@insurance.ohio.gov](mailto:GatewayAdmin@insurance.ohio.gov).

For any urgent External Review situation, please call (614) 644-0188.

For non-urgent External Review questions regarding cases, systems, procedures, and/or requirements, please contact the ODI External Review Program Administrator at [External.Review@insurance.ohio.gov](mailto:External.Review@insurance.ohio.gov) or (614) 644-0188.