

Screening Criteria and Procedure for CGX Testing

December 8, 2019

Client _____ Date _____

Initial Screen -- the Client:

- Has personal history of cancer type: _____
 - Client cancer type is listed on the [Heallio intake form](#), *Personal History Of Cancer* section. Be aware: Medicare has been changing this frequently.
- Age is less than 85 years old.
- Does not have Alzeheimers or dementia
- Has not had genetic cancer screening.
 - If you are doing a resubmittal of a client, check with Pam for how to proceed.
- Has the right insurance (watch [Pam's pVerify training](#) and use [pVerify](#) for this).
 - If only Medicare Part A **and Part B** is listed as the insurance carrier in the "Plan" box, then Medicare is their Primary Payer, which is **acceptable**.
 - If Medicare Part A **and Part B and also another payer** are listed in the "Plan" box, the other payer must be United Healthcare PPO, Medadvantage PPO, Humana PPO, Cigna PPO, Aetna PPO; these are **acceptable**.
 - If any other carrier is listed in the "Plan" box, call Pam for directions. In some cases another carrier will be acceptable.

Our Intake Procedure

- **Before you meet:** If possible, have the prospect gather:
 - Their Medicare and insurance cards (including their Rx plan card)
 - List of their medications
 - List of their drug and food allergies
 - Name of their primary doc, with the telephone, FAX number, email and street address.
 - If you are doing intake using video like zoom.us, tell them in advance so they can easily login and you can easily screen share with them.
- **When you meet:** First, explain the process to your prospect.
 - (Make an audio recording of your meeting with your client and inform them you are doing so. Store the recording safely for possible future need.)

- First, we input their medical information to a secure, encrypted website.
 - The Momentec Care Coordinator will promptly try to contact their physician to obtain permission for the test, and they will continue for 10 working days. If the physician doesn't approve, the lab won't perform the test.
 - After the physician approves, RCA Health (a medical service provider) will contact them to coach them on the swabs that are going to arrive at their home and how to self swab and how to mail it back. It comes in a blue envelope and gets mailed back in a purple envelope.
 - Once processed by the lab, they will receive a written report after about one month.
 - This whole encounter takes 6-8 weeks.
- **The Process:** Input the client's information to Heallio.
 - Note: the purpose is to provide as much relevant information as possible to work with. Answer yes and give details wherever it's appropriate.
 - Regarding their Primary Care Physician:
 - If the PCP isn't supportive of your client, please input the doctor who is most familiar with their situation.
 - [You can look up the doctor's NPI number here.](#)
 - Regarding Patient Insurance Information
 - **Rx BIN** (banking identification number) indicates which company will reimburse the pharmacy for the cost of the prescription. Not all insurance ID cards contain this number.
 - A Processor Control Number (**PCN**) is a secondary number on a health insurance card that is used to route pharmacy claim transactions for health insurers. Not all entities use a **PCN**.
 - When Intake is complete:
 - Click on "Insert" on the blue bar at the bottom and observe that your information has been sent successfully. You may need to scroll to top of page to see this.
 - Consider encouraging your client to call their doctor and request that they approve the test.
 - If you need to change or add anything later, enter a support ticket.

Next steps

- Send your client an email:
 - Outline what will happen next.

- Consider encouraging them to call their doctor and request that they approve the test.
- Stay in touch with them as appropriate.
- Track client progress in your Heallio dashboard. If the client's doc doesn't approve within two weeks, Heallio will put the lead into dead lead status.
- Follow up if things go off track.