



Secure Messaging Service User Guide

What is the purpose of the secure messaging system?

The secure messaging system enables Canada Life auditors to submit electronic audit requests on paramedical (Extended Health Care [EHC]) claims submitted for PSHCP plan members directly to providers in a secure, electronic format. This new feature promotes regulatory compliance and enhances the audit process. Auditors may initiate audit requests and providers will be able to respond to requests via the secure messaging system located in the Provider Portal.

What is the process for completing an audit?

- When Canada Life initiates an audit request for a paramedical (EHC) claim, it may require additional information to support the audit. If additional information is required from a provider, or an auditor needs to generate a message to a provider, the auditor logs into the secure messaging system and completes an audit request.
- The secure messaging system emails this request to the provider, advising them to log into the application via the Provider Portal.
- The provider logs in and views the audit request (noted by a case number), then follows the audit instructions, which include uploading required supporting documentation, and then replies to the auditor.
- The auditor reviews the attachments and comments and either closes the request, or initiates a follow-up request if more information is required.

Who uses the secure messaging system?

Currently, the secure messaging system is used by Canada Life auditors and paramedical (EHC) providers to manage audits on claims for PSHCP plan members. The **Audit requests** link in the Provider Portal is visible only to user administrators.

Is the secure messaging system available only to providers who have submitted PSHCP claims?

Yes. At this time, the secure messaging system is available only for PSHCP providers who Canada Life auditors have asked to provide additional documentation in response to an audit request or notice. We are looking to expand this service to other insurers in the future.

How will a provider know that an audit request or notice request has been assigned to them?

Providers will receive an email notification when an audit and notice request is assigned to them.

What types of documents can providers upload?

Providers can upload documents that have the following file extensions: JPG, JPEG, TIFF, PNG, BMP or PDF.

What do the statuses in the secure messaging system signify?

The following table describes all of the statuses of the secure messaging system.

Status	Description
New	The provider has not yet viewed the case.
Open	The request has been viewed by the provider, but they have yet to submit the information requested to the auditor.



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Status	Description
Follow Up Requested	The auditor has contacted the provider to remind them to act on the request, because the information the provider sent is insufficient to make a proper decision on the request, or because the due date changed.
In progress	The provider has added a comment to the case or uploaded a file but not yet submitted it.
Submitted	The provider has submitted a response to the request.
Closed	The auditor has closed the request; no additional actions are required.

Who should providers reach out to if they have a question about an audit or notice request?

Please do one of the following:

- log into the secure messaging system, select the case that is associated with the Audit ID, and leave a message for the auditor, or
- contact Canada Life directly at: 1-855-415-4414, Monday to Friday 8 a.m. to 5 p.m. caller's local time.

Who should users contact if they are experiencing issues with the secure messaging system?

- Providers should call the eClaims IVR #: 1-866-240-7492, and select option 4 to reach the PMG Service Desk.
- Auditors should call the Carrier IVR at 1-866-342-6570. The CE Tier2IM Service Desk will start the incident management process.



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Responding to audit requests

The following procedure describes how you, as an EHC provider, can respond to your audit requests.

1. Log into the Provider portal.
2. From the TELUS Health services page, select the **Audit requests** link.

The audit requests page is displayed.

Case Number	Audit ID	Subject	Status
02727462	A0000024	Testing Full Post Mapping 37	New
02727461	A0000023	Testing Full Post Mapping 36	Follow Up Requested
02727460	A0000022	Testing Full Post Mapping 35	Closed
02727459	A0000021	Testing Full Post Mapping 34	In Progress
02727458	A0000020	Testing Full Post Mapping 33	Submitted
02727457	A0000019	Testing Full Post Mapping 33	Open



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3. Select the case number of the request you want to view.

The **Case** page is displayed.

The screenshot shows the TELUS Health | Santé interface. At the top, there is a navigation bar with the TELUS logo and a user profile icon labeled 'MEDICAL'. Below this is a 'HOME' breadcrumb. The main content area features a 'Case' header with a document icon and the title 'Testing Full Post Mapping 33'. A table below shows the case status as 'Open' and the case number as '02727457'. A message prompts the user to 'Upload all requested documents, then click "Submit Responses" to complete the request.' A 'Submit Responses' button is visible. Below this, there are two tabs: 'DETAILS' (selected) and 'DOCUMENTS'. The 'DETAILS' tab displays a list of case information in two columns:

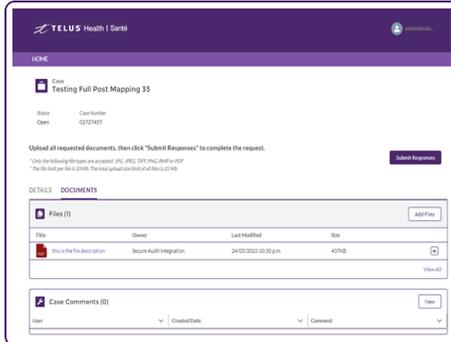
Contact Name	Jud ChiroSB	Case Owner	Secure Audit Integration
Account Name	UAT Accounts	Status	Open
Audit ID	A0000019	Provider ID	2030352
Case Origin	Audit - CANADALIFE	Provider Name	Boots
Audit Started By	SteveB	Email Address	
Audit Started Date	02/02/2023 7:00 PM	Contact Phone	5551212
Audit Type	Audit Type String	Subject	Testing Full Post Mapping 33
Audit Updated By	JohnH	Instructions	This is the more detailed description of the reason for the audit, and what actions are expected by the provider
Audit Updated Date	02/02/2023 7:00 PM	Service Confirmation	



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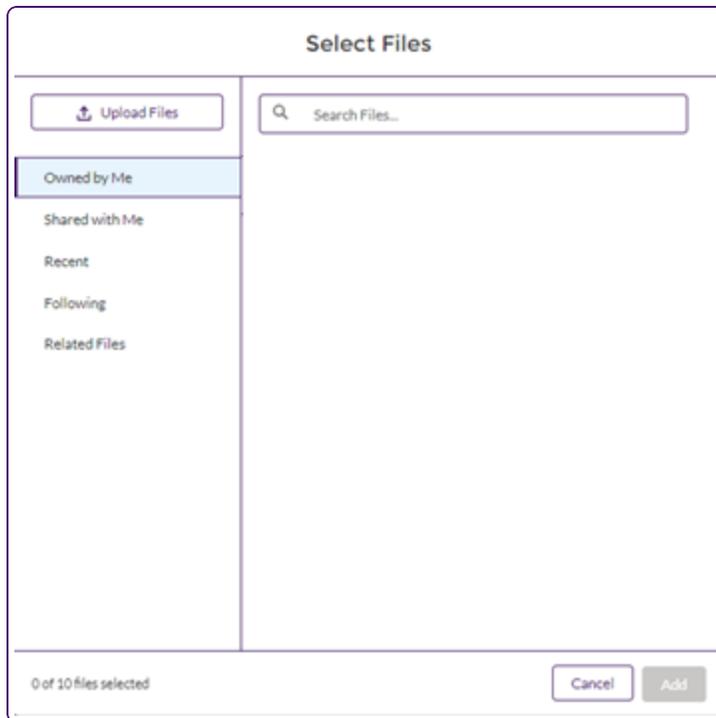
4. To add documents to the request:

- Select the **Documents** tab.



- Select **Add Files**.

The **Select Files** pop-up is displayed.



- Select **Upload Files**.
- Locate and select the file you want to upload, then select **Open** and **Done**.
After the file has been uploaded, it is displayed in the **Files** section of the **Documents** tab.
- To verify the document, double click the name of the file to open it in a new tab, or select the Download  button to its right.



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- To add comments to the request:
 - On the **Details** tab, scroll down to the **Comment** section, and select **New**.

The screenshot shows the TELUS Health interface for a case titled "Testing Full Post Mapping 33". The case status is "Open" and the case number is "02727457". Below the case information, there is a section for uploading documents, with a "Submit Responses" button. The "DETAILS" tab is selected, and the "DOCUMENTS" section shows a table with one file: "this is the file description" (437KB, last modified 24/05/2023 10:30 p.m.). Below the documents section, the "Case Comments (0)" section is visible, and the "New" button is highlighted with a red box.

The **Case Comments** pop-up is displayed.

- Enter your comments and then select **Add**.

The screenshot shows the "Case Comments" pop-up form. It has a title "Case Comments" and a text input field labeled "Body". Below the input field, there are "Cancel" and "Save" buttons.

You can add up to 4000 characters.

You cannot delete or modify comments once they have been saved.



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6. To submit a response:

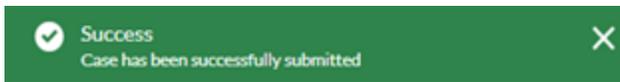
- Select **Send documents**.

The **Submit Documents** pop-up is displayed.

The image shows a 'Submit Documents' pop-up window. At the top, it says 'Submit Documents'. Below that, it asks the user to 'Please confirm the following prior to submission'. Under 'My Role:', there are two radio button options: 'Service provider' (which is selected) and 'Provider's representative'. Below the radio buttons, there is a checked checkbox with the text 'I understand I cannot send documents after confirmation, I have uploaded all requested support documents.' At the bottom of the form, there are two buttons: 'Cancel' on the left and 'Confirm and send' on the right.

- Select your appropriate role, then select the check box next to the confirmation statement.
- Select **Confirm and send**.

The following confirmation message is displayed.



The **Status** of the audit request on the **Case** page changes to Submitted.