

Entering Resident/Fellows into XMAPS

TRANSCRIPT

Welcome to the CRICO Underwriting Training Series. This video features information about how to enter resident and fellow applications.

If you have access to the CRICO XMAPS system, follow the instructions in this video to ensure a smooth underwriting process. If you do not have access to the XMAPS system please complete an External User Enrollment Form which is available on the website after the transcript of this video. The quick reference guide shown here is also available on the website. A few important points to review before we begin:

- Claims histories are not required for resident and fellows
- Only include sites that the physician is practicing at as of the effective date of the application
- When choosing a specialty, only use numerical specialty codes unless specifically entering rates related to CME training
- Also, remember to use all caps when entering data into XMAPS.

We will now walk through the process of entering resident/fellows into XMAPS step-by-step.

1. Search for the physician in XMAPS (first by social security number, then by first and last name if the social security does not return any results. Always confirm that the social security number matches the application once you open the file in XMAPS). If the physician already has a file in XMAPS, check that all of the information in the Personal Information section is complete and accurate. If any changes are made, click Save. If the Personal Information section is complete, skip to the address screen.
2. If there is no physician file, enter all data fields from the application in the Personal Information section including:
 - a. First and last name
 - b. Middle name (if applicable and provided on the application)
 - c. Date of birth and social security
 - d. Degree and gender
 - e. Employer

Then click Save. When entering this data, remember the following notes:

- If there is only a middle initial provided, enter the initial followed by a period.
 - Remember to double check the accuracy of the date of birth and social security number fields as these are used as unique identifiers.
3. If the applicant has an entry in the “Other Legal Names” field of the application, navigate to the Other Names screen. On the Other Names screen, enter this information by clicking the New... button. Otherwise, continue to the Address screen.
 4. In the Address screen, enter all practice sites listed on the application by using the Add button. For Address Type, select Other Physician Address. Do not select Preferred Address or Confirmation Address unless this is the primary practice site.

- a. Note that the primary practice site will automatically appear on the Addresses screen based on the employer selected on the Personal Information screen and you do not need to add it manually.
 - i. Click Ok when you've finished entering the other practice site or home addresses
 - ii. Do not enter the addresses for any sites at which the applicant will no longer be working after the effective date on the application.

Enter the residential address from the application. Do not enter the address if it will not be the primary residence of the applicant after the effective date on the application. In other words, if the applicant is moving from Florida and lists a Florida address, do not enter the address. Once the practice sites and residential address have been entered, click Save then navigate to the Contact Information screen.

5. Add the contact information from the application by using the Add button.
 - a. Enter the contact type and related contact information, then select OK
 - b. When entering the work email, check the boxes for both Preferred Email and Primary Contact unless a work email is not provided or the work email does not appear to be current or will not be current in the near future (for example, if the physician's work email from their previous employer is listed).
 - i. The Preferred Email is the email the physician will use to sign in to My CRICO and should be the work email if available.
 - ii. An email address must be entered in order for the physician's profile to be complete.
 - c. Use the Save button to save your entries, then navigate to the Medical Schools screen.
6. Use the New button to add the medical school from which the applicant graduated.
 - a. Use any of the options (name, state, or country) to search for the school then use the Filter button.
 - b. Highlight the school then save the entry. If the school is not in the database, notify Underwriting upon submitting the application so that it can be added.
 - c. Enter the graduation year.
 - d. Click Save, then navigate to the Licenses screen.
7. Use the New button to add all active licenses listed on the application (even if they are not Massachusetts licenses).
 - a. If there is already a license entered, check that the license number matches the number on the application.
 - b. If the numbers are the same but the renewal date is not current, update the renewal date.
 - c. Click Save
 - d. Navigate to the Coverage screen.
8. Click the New button which will open a new window
 - a. Using the application as a guide, enter the coverage start date. If the date is prior to the current calendar year, please stop entering and notify Underwriting.
 - b. Enter the employment status
 - i. An "Employee" is an employed physician of the sponsor/employer who meets eligibility. This is the most likely status as the other options are uncommon. If you believe there is a scenario of a resident or fellow belonging in a category other

than Employee, please consult with Underwriting prior to proceeding and do not save the coverage screen that has been started.

- c. Enter the physician status; MD Resident, Dental Resident, MD Fellow, or Dental Fellow.
 - d. The insurer will always be CRICO which is the default.
 - e. Select the Department from the dropdown list. This should correspond with the department listed on application; the department selection should logically align with the specialty selected.
 - i. If the ideal option is not available in the dropdown, use your best judgment and context clues to make a selection; otherwise, leave this field blank.
 - f. When selecting the Org (Employer), remember that there are nuances to sponsorship.
 - i. For example, Children's Medical Center Corporation is always the sponsor for a Boston Children's Hospital physician, but is never the direct employer. Therefore, Children's Hospital should be selected in this case.
 - ii. Be sure to select the employer rather than the sponsor (unless the sponsor and employer are the same organization). Double check your selection as any mistakes will need to be corrected by the IT Department at CRICO.
 - iii. If you are unsure of the correct selection, contact Underwriting and do not continue to enter the application. Any errors in this field will cause delays to the application's processing.
 - g. Enter the specialty of the physician by clicking the Add button.
 - i. If there are multiple specialties, they should add to 100%.
 - ii. Do not use any codes beginning with WD, CH, or TT.
 - iii. Be sure to remain consistent when entering applications for similar physicians. For example, residents enrolled in the same residency program should likely have the same specialty breakdown.
 - iv. If you have any questions about specialties or are unable to locate a specialty, indicate this when you submit the application to Underwriting.
 - h. Double check all entries then use the Save option to save your entries.
9. Once the application is entered, you can email the application to underwritingapps@rmf.harvard.edu. Remember to include any notes or questions for Underwriting to review upon receiving the application. Please send each application in a separate email rather than submitting multiple applications at once. If you have any questions or concerns about the process, you can contact your assigned Relationship Manager, email underwriting@rmf.harvard.edu, or call (617) 450-8219.