Appeals Information Management System (AIMS) Portal User Guide

For Agencies and Contractors

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Introduction

The Department of Medical Assistance Services (DMAS) Appeals Information Management System, or AIMS, is designed to ensure client and provider appeals are processed timely per regulations governing Medicaid appeals. Toward this goal, DMAS has provided its agency partners and contractors with online access to AIMS. This portal access enables authorized individuals to track the status of client and/or provider appeals, upload documents, review DMAS appeal documents, review hearing details, assign workers to appeals, and confirm or decline proposed hearings.

After DMAS staff review a client or provider appeal request and create a new appeal in AIMS, the appeal moves to the "Pending Scheduling" status. AIMS generates the Notification of the Appeal email to the responsible Agency or Contractor (this guide will sometimes use the phrase "Agency" to refer to both Agencies and Contractors). Authorized individuals from your Agencies will use the AIMS portal to retrieve and upload documents and track the appeal as it moves through the appeal process.

This AIMS Portal User Guide for Agencies and Contractors provides instruction for your use of the portal and includes the following topics:

- Request AIMS Access
- Navigate in the AIMS Portal
- Confirm or Decline proposed hearings
- AIMS Portal Queues
- View an Appeal
- Monitor Your Queues
- Upload and Download Documents
- Account Maintenance
- Support

Submit a Request for AIMS Portal Access

To request access to the AIMS portal, complete the Agency Access Request page on the Department of Medical Assistance Services (DMAS) website, using this link:
https://appeals-registration.dmas.virginia.gov/agency

The DMAS Appeals Division confirms your request by email. If DMAS approves access to the AIMS portal, an account will be created for you, and you'll receive separate emails with your user ID and temporary password. You can change your password once you log in.

If you or your Agency submitted a request and have not heard from DMAS within two (2) business days, please contact 804-486-2865.

Navigate in the AIMS Portal

An AIMS portal account provides you with quick access to your Agency's appeals. You navigate in AIMS by clicking tabs and selecting records from lists called *queues*. You type into text fields, use dropdown menus, and select buttons to enter information throughout the portal.

Note: AIMS is a dynamic system – as you enter information or make selections in the portal, the screen may change to show new fields or options.

Log In

AIMS is a secure web-based system. You will use a **username** and **password** to log in.

1. To log into AIMS, click **https://vamedicaid.dmas.virginia.gov/**.

2. Enter your username in the **Username** field.

3. Enter your password in the **Password** field.

4. Click the **Sign-In** button.

5. On the **MES Dashboard**, click the **Appeals** tile to expand.

6. Click the **Appeals Information Management System (AIMS)** link.

Create Your User Profile

After your initial login, AIMS directs you to the **Client** tab to complete profile information. You can view or change this information at any time by clicking the **Profile** icon on your dashboard.

1. Complete all applicable fields on the **Client** tab.

   The **First Name**, **Last Name,** and **Email Address** fields are read-only and auto-populate with information from the user's account.

2. Click the **Save Profile and Go Home** button.

Dashboard and General Navigation

Once you log into AIMS, your dashboard displays; this is your **Home** screen. There are navigation bars and tabs, which remain available to you wherever you are in the AIMS portal— the **Home** tab, **Utility** bar, and **System Notifications** bar.

System Notifications Bar

The **System Notifications** bar appears at the top of your screen and displays notices about the system. The most common messages displayed here are notices of planned maintenance outages.

Utility Bar

The **Utility** bar, located just below the **System Notifications** bar, is available throughout the AIMS portal. There are two (2) options on the **Utility** bar.

Sign Out	**Sign Out** is used for logging off of the AIMS portal.
Help	If clicked, the online **Help** popup will display, and you can search for page-specific help and links to other resources.

Home Tab

The **Home** tab is located just below the **Utility** bar. Regardless of where you are within AIMS, clicking **Home** returns you to your dashboard.

Security Timeout

For security purposes, your AIMS session times out after 15 minutes of inactivity. If you are inactive for 10 minutes, a popup displays advising that your session will expire in 5 minutes.

1. To renew your session, click **OK**.

2. A second popup displays. To confirm your session is renewed, click **OK**.

AIMS Portal Queues

Several queues are available on your dashboard and include both client and provider appeals. The queues are: *Client Proposed Hearings Queue, Client Open Appeals Queue, Client Closed Appeals Queue, Provider Open Appeals,* and *Provider Closed Appeals.* All five (5) queues are visible on your dashboard, but not all queues will populate with appeals if you do not have access to both client and provider appeals.

Access Your Queues

You can find your queues under the **Agency** section on the left side of your dashboard. Follow these steps to access a queue.

1. To select a queue, click on its name.

2. The selected queue displays on your dashboard.

Manage Your Queues

Each queue displays client or provider appeals with a similar status. The tables below describe each of these queues.

Client Proposed Hearings Queue

This queue lists all **Open** client appeals for your Agency with hearings in the "Pending Scheduling" status.

Client Proposed Hearings Queue								
Show 10 entries							Q	
Appeal Number	Status	Client Name	Member ID	VACMS ID	Hearing Type	Hearing Date	Hearing Time	Assigned Worker
C-000007386	Pending Scheduling	Aaron Appealer	653-698656-565	111111111111	Phone	10/01/2021	01:00 pm	Tom Thompson

The appeal information displays (if available) under each of the following column headers:

- o Appeal Number
- o Status
- o Client Name
- o Member ID
- o VACMS ID
- o Hearing Type
- o Hearing Date
- o Hearing Time
- o Assigned Worker

Client Open Appeals Queue

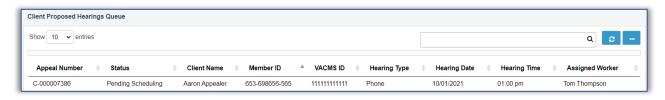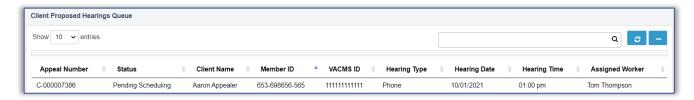This queue displays all **Open** client appeals for your Agency, regardless of status.

Client Open Appeals Queue									
Show 10 entries								Q	
Appeal Number	Status	Client	Continued Coverage	Appeal Summary Due	Appeal Summary Submitted	Hearing Type	Hearing Date	Hearing Time	Assigned Worker
C-000005260	Scheduled	Andrew Appealer	Yes	09/04/2020	No	Phone			Katie Hastings
C-000005291	Scheduled	Happy Feet		09/07/2020	No	Face to Face	07/21/2021	11:00 am	Harry Potter
C-000005300	Decision	Andrew Appealer		09/07/2020	No	Phone			Tom Thompson

The appeal information displays (if available) under each of the following column headers:

- o Appeal Number
- o Status
- o Client
- o Continued Coverage
- o Appeal Summary Due (Date)
- o Appeal Summary Submitted
- o Hearing Type
- o Hearing Date
- o Hearing Time
- o Assigned Worker

Note: Any appeal in the "Pending Scheduling" status displays in both the *Client Proposed Hearings Queue* and the *Client Open Appeals Queue*.

Client Closed Appeals Queue

This queue displays **Closed** client appeals for your Agency.

Client Closed Appeals Queue

Show 10 entries

Appeal Number	Client	Member ID	VACMS ID	Decision Date	Decision Outcome	Remand Due Date	Assigned Worker
C-000005258	Andrew Appealer	123-456344-343	313123132312	08/20/2020	Sustain & Remand	09/09/2020	Katrina Wresche
C-000005624	Peter Person	554-422114-454	33445343	09/09/2020	Sustain		Penelope Person
C-000005625	Peter Person	554-422114-454	33445343	09/09/2020	Sustain		Penelope Person
C-000005626	Peter Person	554-422114-454	33445343	09/09/2020	Sustain		Penelope Person

The appeal information displays (if available) under each of the following column headers:
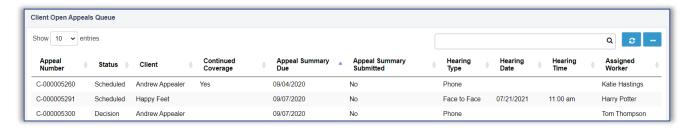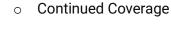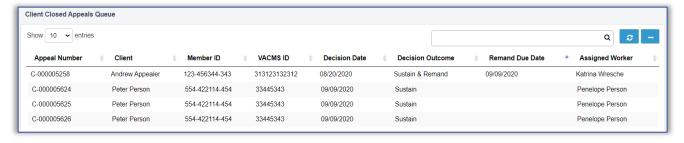
- Appeal Number
- Client
- Member ID
- VACMS ID
- Decision Date
- Decision Outcome
- Remand Due Date
- Assigned Worker

Provider Open Appeals Queue

This queue lists the **Open** formal and informal provider appeals for your Agency.

Provider Open Appeals

Show 10 entries

Appeal Number	Case Type	Status	Due Date	Provider	Representative	Member	Program/Issue	Case Summary Due	Case Summary Received	IFFC or Hearing Date
P-000005316	Provider Informal	Scheduled	02/01/2021	3rd Party Billers, LLC	Dew John			09/04/2020		07/12/2021 02:00 pm
P-000005358	Provider Formal	Scheduled	06/19/2020	B&B	Dew John			09/01/2020		07/22/2021 10:00 am
P-000005851	Provider Informal	Scheduled	04/12/2021	Dennis Provider	Henry Helper	Aaron Appealer		11/11/2020		08/05/2021 08:00 am

The appeal information displays (if available) under each of the following column headers:

- Appeal Number
- Case Type
- Status
- Due Date
- Provider
- Representative
- Member
- Program/Issue
- Case Summary Due
- Case Summary Received
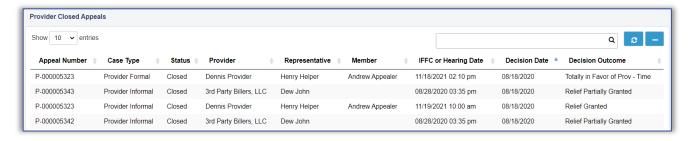- IFFC or Hearing Date

Provider Closed Appeals Queue

This queue displays all **Closed** formal and informal provider appeals for your Agency.

Provider Closed Appeals

Show 10 ⌄ entries

Appeal Number	Case Type	Status	Provider	Representative	Member	IFFC or Hearing Date	Decision Date	Decision Outcome
P-000005323	Provider Formal	Closed	Dennis Provider	Henry Helper	Andrew Appealer	11/18/2021 02:10 pm	08/18/2020	Totally in Favor of Prov - Time
P-000005343	Provider Informal	Closed	3rd Party Billers, LLC	Dew John		08/28/2020 03:35 pm	08/18/2020	Relief Partially Granted
P-000005323	Provider Informal	Closed	Dennis Provider	Henry Helper	Andrew Appealer	11/19/2021 10:00 am	08/18/2020	Relief Granted
P-000005342	Provider Informal	Closed	3rd Party Billers, LLC	Dew John		08/28/2020 03:35 pm	08/18/2020	Relief Partially Granted

The appeal information displays (if available) under each of the following column headers:

- Appeal Number
- Case Type
- Status

- Provider
- Representative
- Member

- IFFC or Hearing Date
- Decision Date
- Decision Outcome

Sort Your Queue

There are several ways to display queue lists to make it easier to find what you need. When you have multiple appeals in one queue, it is helpful to sort your queue.

To sort the column (ascending or descending), click the **Column Heading**.

Client Open Appeals Queue

Show 10 ⌄ entries

Appeal Number	Status	Client
C-000005429	Decision	Andrew Appealer
C-000005438	Scheduled	Peter Person

Search Your Queue

If your queue displays multiple pages of results, another way to find what you need more quickly is to use the search feature.

1. Type your search term(s) directly into the **Search** bar and press the **Enter** key on your keyboard after entering each term.

Information: A queue is searchable by one criterion or a combination of the criteria displayed under each column heading. For example, you can search by name (first or last), status, hearing date, or appeal number.

2. Search results display on your dashboard. To remove a term from the **Search** bar, click the "**x**" on the term.

Advanced Search

The search bar can combine search criteria in two ways. By default, your searches show appeals that contain ANY of the criteria you enter. You can turn that off and return only appeals that contain ALL of your search criteria.

1. To change the search mode, click the **Ellipsis** ⊟ button.

2. Click the **Search Combine (OR Operator)** button—the button displays in the "**OFF**" position.
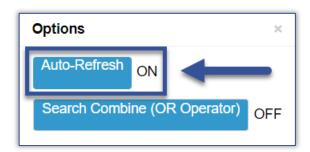
Information: Buttons that display when you click the Ellipsis are toggles. To switch between the "ON" to "OFF" position, click the button again.

- If the **Search Combine (OR Operator)** is enabled or "ON," the search returns appeals that match any of the terms entered.

- If the **Search Combine (OR Operator)** is disabled or "OFF," the search returns appeals that match *ALL* terms, further narrowing your search.

Refresh Your Queues

The AIMS portal refreshes queues automatically. You may also refresh your queues on demand if desired. You can set this refresh function to "ON" and "OFF."

1. To refresh your queue, click the **Refresh** button.

2. To turn "OFF" the automatic refresh function, click the **Ellipsis** button.

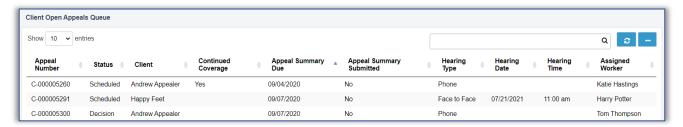3. Click the **Auto-Refresh** button, toggling between "ON" and "OFF."

View an Appeal

After you locate an appeal to review, select that record to view the appeal from the queue. The information available to you may vary based on appeal status.

To select a record, click anywhere in that appeal's row.

Client Open Appeals Queue									
Appeal Number	Status	Client	Continued Coverage	Appeal Summary Due	Appeal Summary Submitted	Hearing Type	Hearing Date	Hearing Time	Assigned Worker
C-000005260	Scheduled	Andrew Appealer	Yes	09/04/2020	No	Phone			Katie Hastings
C-000005291	Scheduled	Happy Feet		09/07/2020	No	Face to Face	07/21/2021	11:00 am	Harry Potter
C-000005300	Decision	Andrew Appealer		09/07/2020	No	Phone			Tom Thompson

Information: When you select an appeal from the queue list, the screen refreshes, and the **Appeal** screen displays. The sections that display on the **Appeal** screen vary based on the appeal status. See the following sections for more information on the **Appeal** screen.

Monitor Your Queues

Client Proposed Hearings Queue

The *Client Proposed Hearings Queue* lists client appeals for your Agency that are in the "Proposed Hearing" status. You may view hearing details, confirm or decline a proposed hearing, and upload and download documents for appeals in this queue. This queue helps you quickly identify appeals with proposed hearings.
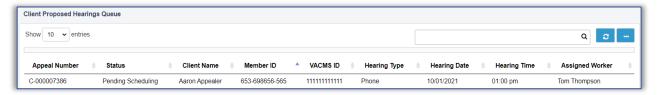
Follow these steps to access this queue.

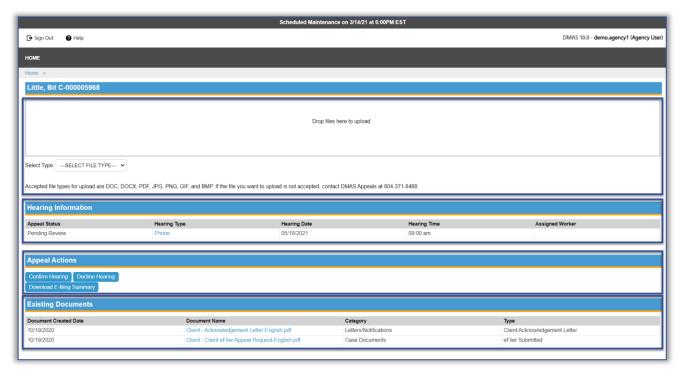1. From the **Agency** section, select the **Client Proposed Hearings Queue.**

2. The **Client Proposed Hearings Queue** displays in a section on your dashboard. To view the record, click anywhere in that record's row.

3. The screen will refresh, displaying the **Appeal** screen. Appeals in this queue are in the "Pending Scheduling" status and the **Appeal** screen displays in four (4) sections.

Information: Each of the four (4) sections on the **Appeal** screen enables you to perform a different task.

- o 1st (top) section: Use the **Drop files here to upload** section to upload case documents.
- o 2nd section: View at-a-glance details in the **Hearing Information** section.
- o 3rd section: Confirm or decline hearings in the **Appeal Actions** section.
- o 4th section: Download documents from the **Existing Documents** section.

Note: When you select an appeal from this queue, you may want to first review the **Hearing Information** section, which displays the **Appeal Status**, **Hearing Type**, **Hearing Date,** and **Hearing Time**. Once you have reviewed the **Hearing Information**, you can confirm or decline the proposed hearing in the **Appeal Actions** section.

Confirm a Proposed Hearing

You can confirm a client proposed hearing in the AIMS portal. Providers do not confirm hearings in the portal. Once you have selected the appeal and are on the **Appeal** screen, follow these steps to confirm a proposed hearing.

1.   Review the information in the **Hearing Information** section.

Appeal Status	Hearing Type	Hearing Date	Hearing Time	Assigned Worker
Pending Review	Phone	08/31/2021	09:00 am	Tom Thompson

2.   From the **Appeal Actions** section, click the **Confirm Hearing** button.

Information: Additional fields display once you select the **Confirm Hearing** button. You are required to complete these fields.

3.   Enter the information regarding the Agency worker (the main point of contact on the specific appeal). These required fields include the **Worker's First Name**, **Worker's Last Name**, **Worker's Phone**, **Hearing Phone**, and **Worker's Email** fields.

Note: You must complete these required fields to confirm the hearing. When confirming the hearing, keep in mind that the **Agency Worker** entered becomes the designated *primary* **Agency Worker** for the appeal.

4.   Click the **Confirm Hearing** button. (To cancel, click the **Cancel** button.)

Information: Once you confirm the hearing, the **Hearing Information** and **Appeal Actions** sections no longer display. The hearing status updates to "Scheduled" and now displays in

the *Client Open Appeals Queue* or *Provider Open Appeals* queue as "Scheduled." The *Client Schedule Letter* generates and appears in the **Existing Documents** section. The *Scheduling Notice* email is sent to the Responsible Agency Contact.

Note: Agency users cannot change the hearing date in AIMS once the appeal is confirmed and updated to the "Scheduled" status. To reschedule a hearing, Agency users can contact DMAS at 804-371-8488.

Decline a Proposed Hearing

You can decline a proposed hearing in the AIMS portal. Once you have selected the appeal and are on the **Appeal** screen, follow these steps to decline a proposed hearing.

1. From the **Appeals Actions** section, click the **Decline Hearing** button.

2. In the **Decline Reason** text box, type the reason you are declining the proposed hearing.

Note: If you no longer want to decline the hearing, click the **Cancel** button.

3. Click the **Decline Hearing** button.

4. The confirmation popup displays. Click **OK**.

Information: Once you decline the hearing, the **Hearing Information** and **Appeal Action** sections no longer display the *Client Proposed Hearings Queue*. DMAS will pick a new date, and then the appeal will display again in the *Client Proposed Hearings Queue.*

Note: Agency users are not able to update a hearing in the "Declined" status.
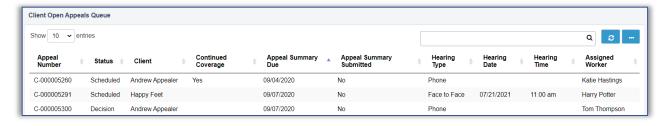
Client Open Appeals Queue

The *Client Open Appeals Queue* lists appeals for your Agency that are not in a "Closed" status. These queues provide a list of appeals for which an **Appeal Summary** has or has not yet been submitted, listed by the closest **Appeal Summary Due** date. You can view and download existing documents or upload new documents for appeals listed in these queues.

Follow these steps to access this queue.

1. From the **Agency** group, select the **Client Open Appeals Queue**.

2. The **Client Open Appeals Queue** displays on the dashboard.

Client Open Appeals Queue

Show 10 entries

Appeal Number	Status	Client	Continued Coverage	Appeal Summary Due	Appeal Summary Submitted	Hearing Type	Hearing Date	Hearing Time	Assigned Worker
C-000005260	Scheduled	Andrew Appealer	Yes	09/04/2020	No	Phone			Katie Hastings
C-000005291	Scheduled	Happy Feet		09/07/2020	No	Face to Face	07/21/2021	11:00 am	Harry Potter
C-000005300	Decision	Andrew Appealer		09/07/2020	No	Phone			Tom Thompson

Note: Sorting columns can make it easier to find and prioritize appeals. Click the column heading, such as **Appeal Summary** or **Appeal Summary Due**, to change the sort order.

Note: If there is a "Yes" in the **Continued Coverage** column, AIMS generates the *Continued Coverage Letter* and sends the *Continued Coverage Approved* email to you as the Responsible Agency.
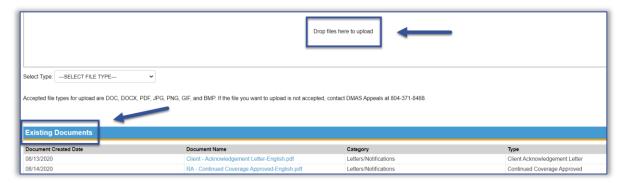
3. To view a record, click anywhere in that record's row.

Information: The screen refreshes, and the **Appeal** screen displays. If the **Open** appeal is in a status other than "Pending Schedule," the screen is divided into two sections.

- o You can upload documents at the top of the screen (such as a Notice of Action or Appeal Summary) in the **Drop files here to upload** section.
- o You can download documents from the **Existing Documents** section at the bottom of the screen.

Note: If the appeal is in the "Pending Schedule" status, then the **Hearing Information** and the **Appeal Status** sections also display.

Client Closed Appeals Queues

You can view documents and other information for your Agency's appeals with a "Closed" status in the *Client Closed Appeals Queue*. This queue provides a list of closed appeals. They may be closed due to a full decision, administrative resolution, or are withdrawn or abandoned/closed.
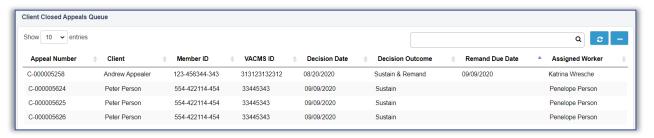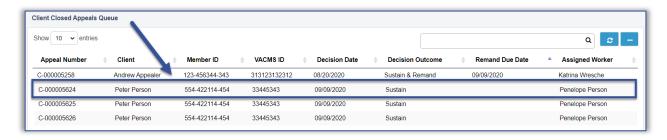
Follow these steps to access this queue.

1. From the **Agency** group, select the **Client Closed Appeals Queue.**

2. The **Client Closed Appeals Queue** displays in a section on your dashboard. You can sort the appeals by column header.

Appeal Number	Client	Member ID	VACMS ID	Decision Date	Decision Outcome	Remand Due Date	Assigned Worker
C-000005258	Andrew Appealer	123-456344-343	313123132312	08/20/2020	Sustain & Remand	09/09/2020	Katrina Wresche
C-000005624	Peter Person	554-422114-454	33445343	09/09/2020	Sustain		Penelope Person
C-000005625	Peter Person	554-422114-454	33445343	09/09/2020	Sustain		Penelope Person
C-000005626	Peter Person	554-422114-454	33445343	09/09/2020	Sustain		Penelope Person

3. To view the record, click anywhere in that record's row.

Appeal Number	Client	Member ID	VACMS ID	Decision Date	Decision Outcome	Remand Due Date	Assigned Worker
C-000005258	Andrew Appealer	123-456344-343	313123132312	08/20/2020	Sustain & Remand	09/09/2020	Katrina Wresche
C-000005624	Peter Person	554-422114-454	33445343	09/09/2020	Sustain		Penelope Person
C-000005625	Peter Person	554-422114-454	33445343	09/09/2020	Sustain		Penelope Person
C-000005626	Peter Person	554-422114-454	33445343	09/09/2020	Sustain		Penelope Person

4. The **Appeals** page displays only the **Existing Documents** section.

Existing Documents

Document Created Date	Document Name	Category	Type
08/14/2020	test over 12	Letters/Notifications	Client Acknowledgement Letter
08/14/2020	Client - Acknowledgement Letter-Spanish.pdf	Letters/Notifications	Client Acknowledgement Letter
08/20/2020	Client - Generate Final Decision - Client-Spanish.pdf	Decisions	Final Decision
08/20/2020	TEST.docx	Case Documents	Hearing Recording
08/20/2020	Client - Schedule Letter - Phone-Spanish.pdf	Letters/Notifications	Client - Phone Hearing

Note: If needed, use your window scroll bar to view the entire list.
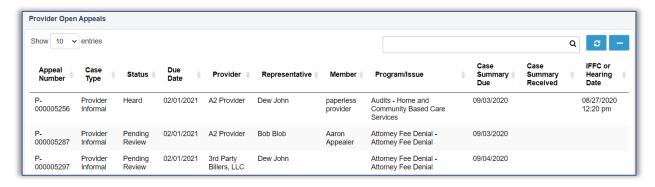
Provider Open Appeals Queue

You can view and download existing documents or upload new documents for appeals listed in these queues.
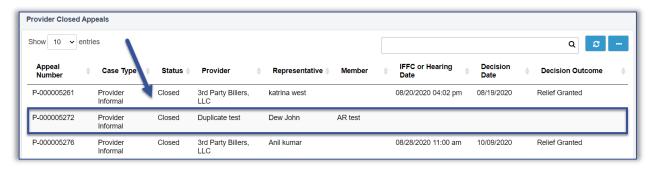
1. From the **Agency** group, select the **Provider Open Appeals Queue.**

2. The **Provider Open Appeals Queue** displays in a section on your dashboard. You can sort the appeals by column header.

Note: Sorting columns can make it easier to find and prioritize appeals. Click the column heading, such as **Appeal Number** or **Case Summary Due.**

3.   To view the record, click anywhere in that record's row.

Information: The screen refreshes, and the **Appeal** screen displays. If the **Open** appeal is in a status other than "Pending Schedule," the screen is divided into two sections.

- o   You can upload documents at the top of the screen in the **Drop files here to upload** section. You can upload:
  - o   Notice of Denial
  - o   Case Summary
  - o   Other
- o   You can download documents from the **Existing Documents** section at the bottom of the screen.

Provider Closed Appeals Queue

The *Provider Closed Appeals* queue lists provider appeals for your Agency in the "Closed" status.

1. From the **Agency** group, select the **Provider Closed Appeals Queue.**

2. The **Provider Closed Appeals Queue** displays in a section on your dashboard. You can sort the appeals by column header.

3. To view the record, click anywhere in that record's row.

4. The **Appeals** page displays only the **Existing Documents** section.

Existing Documents			
Document Created Date	**Document Name**	**Category**	**Type**
09/17/2020	Provider - Generate Final Decision - Provider Formal-English.pdf	Decisions	Final Decision
09/08/2020	Provider - Exceptions Letter-English.pdf	Letters/Notifications	Exceptions Letter
09/08/2020	SC - Exceptions Letter-English.pdf	Letters/Notifications	Exceptions Letter

Upload and Download Documents

You can upload and download documents associated with an open appeal in the *Client Open Appeals Queue, Provider Open Appeals Queue*, and the *Client Proposed Hearings Queue*.

Note: The upload feature is not available in the *Provider Closed Appeals Queue and Client Closed Appeals Queue*.

Upload Documents

You can upload documents such as the Appeal Summary or a Notice of Action in the **Drop files here to upload** section at the top of the **Appeal** screen.

Follow these steps to upload documents.

1. Click the **Drop files here to upload** button.

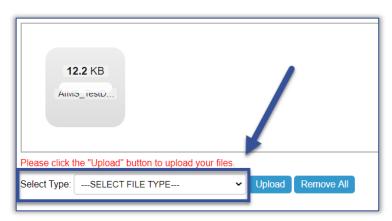2. Select a document from your local directory. The AIMS portal captures the file name and the file type.

Note: Accepted file types for upload are DOC, DOCX, PDF, JPG, PNG, GIF, and BMP.

If the file you want to upload is not accepted, contact the DMAS Appeals Division at 804-371-8488.

3. Confirm the document selected is correct. If you've selected the wrong document, click the **Remove All** button to replace the document.

4. Select a file type from the **Select Type** dropdown.
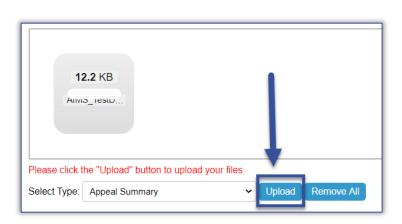

Information: Here is the list of document types in the **Select Type** dropdown. Agency users most commonly use Notice of Action, Appeal Summary, and Other.

- o Notice of Action
- o Client Appeal Request
- o Appeal Summary
- o Authorized Representative Document
- o Other

5. Then, click the Upload button.

6. Once uploaded, the document displays in the **Existing Documents** section.

Download Documents

The **Existing Documents** section displays the **Document Created Date**, **Document Name**, **Category**, and **Type** for each document. You can download any of the existing documents from the selected appeal in the **Existing Documents** section of the **Appeal** screen. All documents associated with an appeal will appear here, whether added by DMAS, the Agency, or the Appellant.

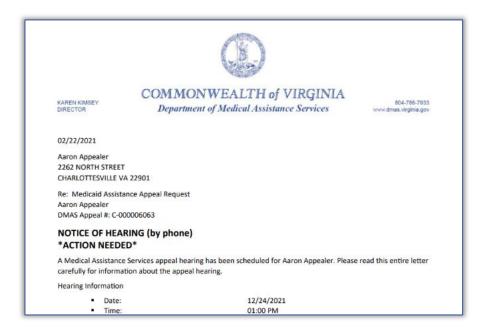Follow these steps to download documents.

1. After you open an appeal, scroll down to view all documents in the **Existing Documents** section. To download, click the **Document Name** link.

> **Note**: If the document does not open automatically, click the **document icon** at the bottom of your browser window.

2. The document displays on a separate tab or in Adobe Reader.

> **Note**: Documents display in PDF file format, which includes text formatting and images. You can download and save the document to your computer and print a copy as needed.
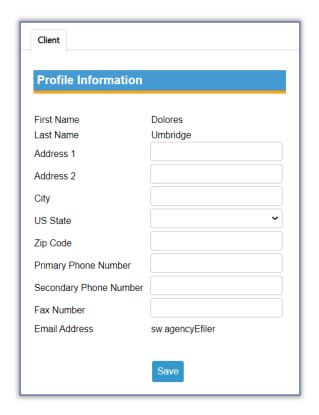
Account Maintenance

Update My Profile

Click the **My Profile** icon to update your account information and contact details.

1. Select the **My Profile** icon on your dashboard.

2. The **Client** tab opens. Update the information as appropriate.

3. Click **Save**.

Need Support?

If you have questions about the AIMS portal or need support regarding appeals with DMAS, please contact the DMAS Appeals Division at 804-486-2865.