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1. Purpose

This document provides the steps for agents to follow to send an email to a patient who completed the Compassionate Care application online, but who still needs to submit their financial documents.

2. Scope

This does not include the steps for pulling the data from Snowflake, nor the steps to

3. References

3.1 Comp Care 2020 Oct-Dec Spreadsheet [Link](#)

3.2 Online Comp Care Application [Link](#)

4. Definitions

4.1 Comp Care / Compassionate Care Natera's patient financial assistance program

4.2 RCM Revenue Cycle Management, Insurance Billing

5. Responsibilities

5.1 RCM Training and QA department is responsible for ensuring that this document is complete, accurate, and up to date.


5.2 RCM Call Center Management is responsible for ensuring that Snowflake data is imported into spreadsheet in a timely manner, as well as ensuring Compassionate Care applications are processed and patients are notified of patient responsibility after application.

5.3 Panamericom is responsible for training agents and performing the steps necessary to complete this procedure.

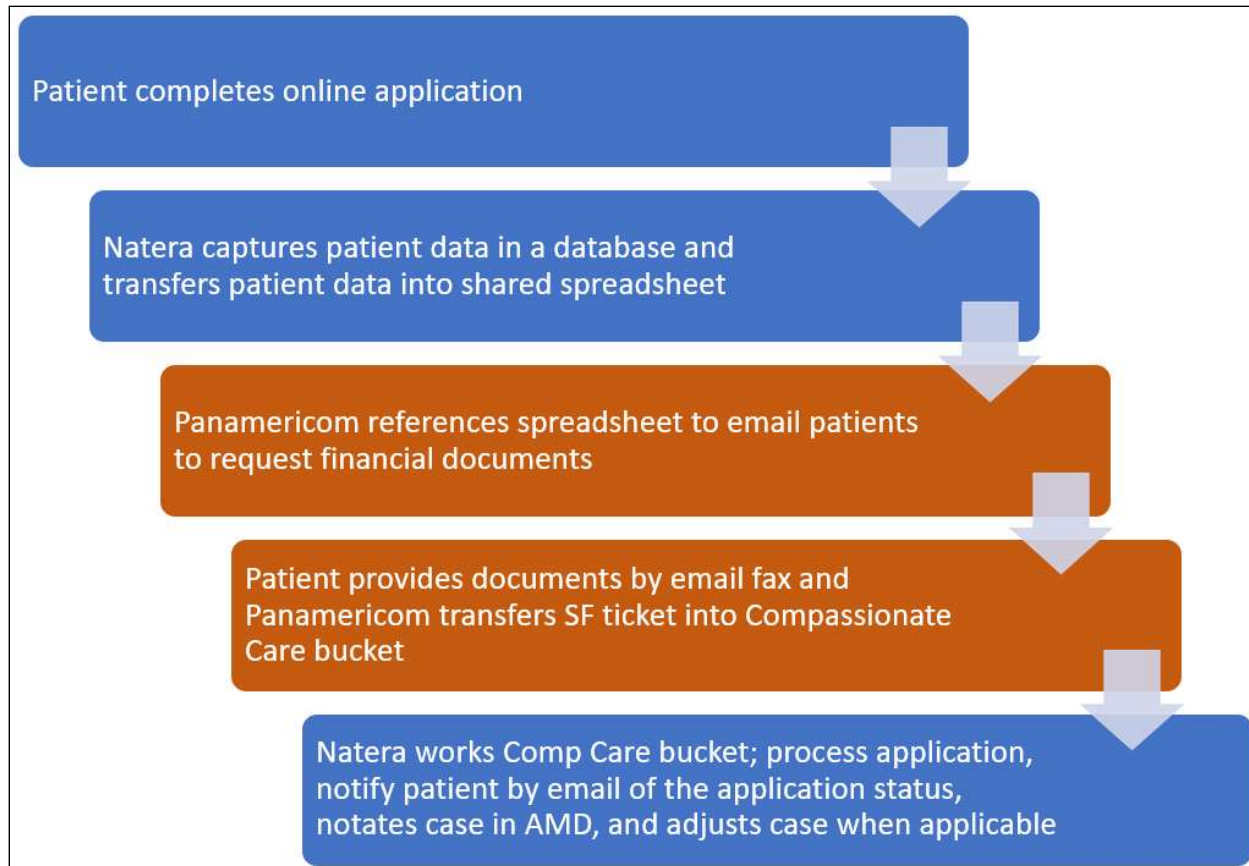
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6. Procedure



- 6.1 Open spreadsheet - <https://docs.google.com/spreadsheets/d/1IWJcofPHQClirHKZ3IDzcNL2m7X0lyIDVbZQlW0cRNE/edit?usp=sharing>
 - 6.1.1 Laura Cobb is owner
- 6.2 Identify row to work
 - 6.2.1 Initials in columns B or F mean it was already worked. You will skip these.
 - 6.2.2 Skip row when column H is more than 1 (it is 2, 3, 4, Etc.)

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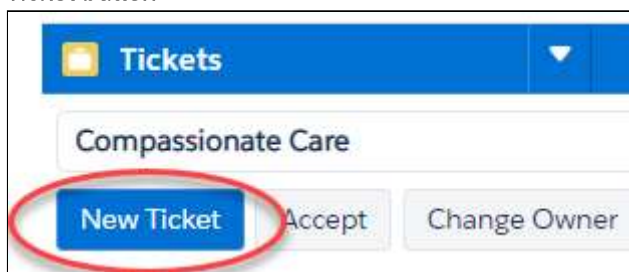
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A	B	C	D	E	F	G	H
Last Date Pulled from Snowflake	Comp Care Completed/ responded	All Case# -combo	Yes/No Case is in AMD?	Total in household	Patient emailed for Income verification? Initials	SF Ticket# of returned income	# NUMBER OF DUPLICATE EMAIL ADDRESS
10/05-10/11	RS	3766771/70	N	3	RS	SF 05493979	1
10/05-10/11							1
10/05-10/11							1
10/05-10/11							1
10/05-10/11							1
10/05-10/11							3
10/05-10/11							3
10/05-10/11							1
10/05-10/11							1

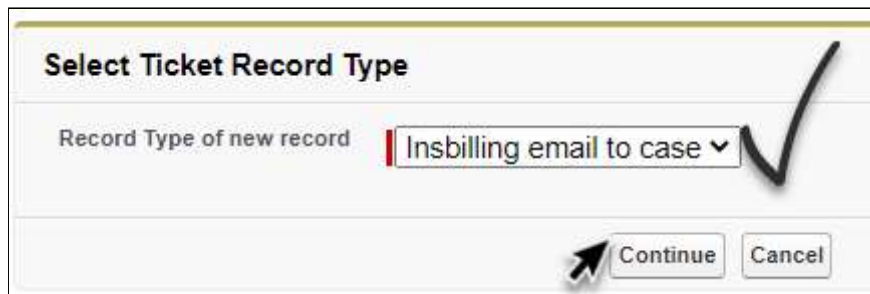
SKIP - Initials in column "F" mean patient was already emailed

SKIP when 2, 3, 4, etc. It means patient filled out App 2x, 3x

- 6.3 Copy patient email from column "O"
- 6.4 Open new Salesforce ticket
- 6.5 Click New Ticket button




- 6.6 Leave Record Type as is
- 6.7 Click continue

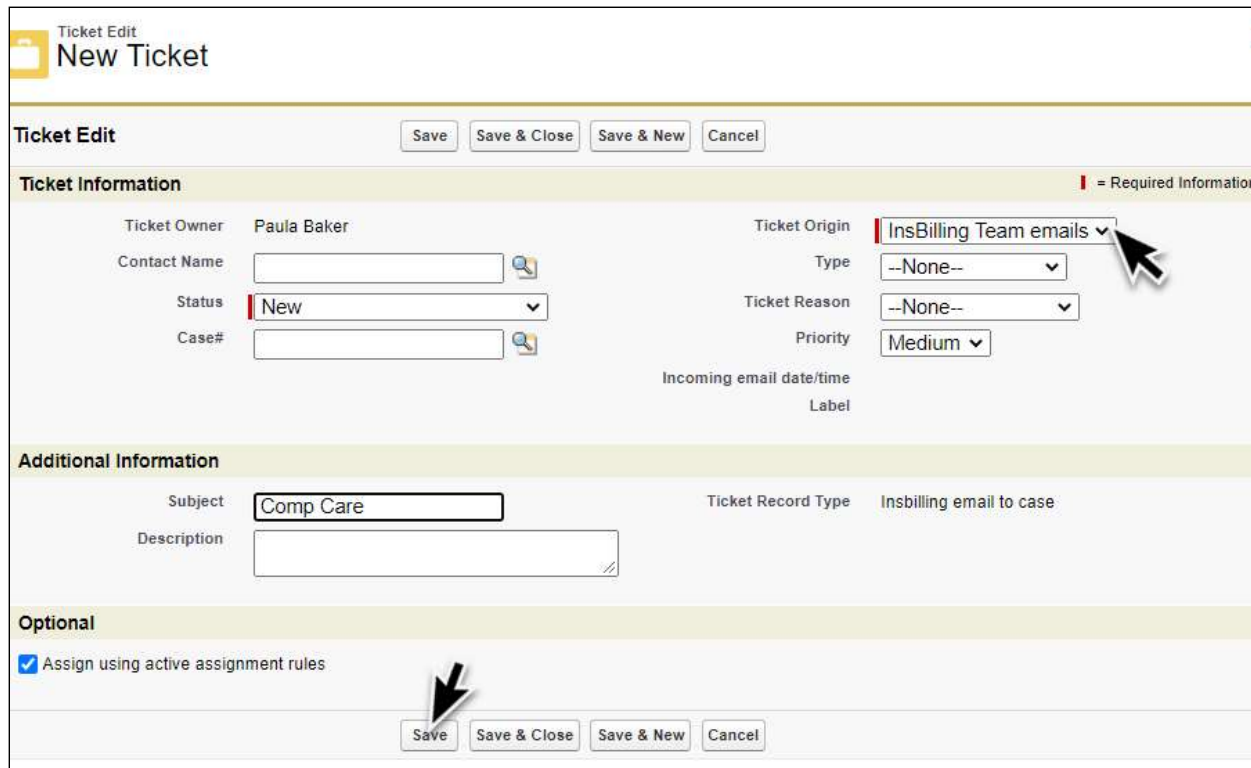


- 6.8 Change Ticket Origin to "InsBilling Team emails"
- 6.9 Click Save

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6.10 Click Send an Email Button (within the SF ticket you just created)




6.11 Enter your email information

- 6.11.1 From Natera Billing - insbilling@natera.com
- 6.11.2 Additional to: paste patient's email
- 6.11.3 Subject: Natera Comp Care
- 6.11.4 Body
 - 6.11.4.1 Paste template from Scripts tab and replace Reference# with that patient's approval # from column "I"
- 6.11.5 Click send

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Email Format: Text-Only [Switch to HTML]

From: "Natera Billing" <insbilling@natera.com> **1**

To: [Empty]

Related To: Ticket [Dropdown] 05496183

Additional To: @msn.com **2**

CC: [Empty]

BCC: pbaker@natera.com

Subject: Natera Comp Care **3**

Body:

"Greetings,
 Reference # t2qyvw **4**
 Thank you for applying for Compassionate Care via Natera.com
 In order to complete this application, we will need you to please reply to this email with proof of income.
 Please include one of the following documents to show your current household income, a copy or scan of:

- Last year's W2 form(s)
- Last year's income tax return

5 [Send] [Select Template] [Attach File] [Cancel]

6.12 Change ticket owner to Compassionate Care


Ticket Owner	Compassionate Care [Change]
Ticket Number	05496183
Contact Name	
Status	Awaiting Customer response
Case#	

6.13 Close the ticket with the appropriate disposition codes

- 6.13.1 Patient
- 6.13.2 Billing
- 6.13.3 Compassionate Care

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Ticket Edit Save Cancel

Ticket Information

Status:

Caller Type:

Disposition Code Level 1:

Disposition Code Level 2: ⓘ

6.14 Add your name/initials in column F

F
Patient emailed for Income verification? Initials
RS
LLC
PFB

Revision History

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Rev	DCO	Description of Changes	Effective	Originator
01	TBD	Initial Release	TBD	TBD

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