



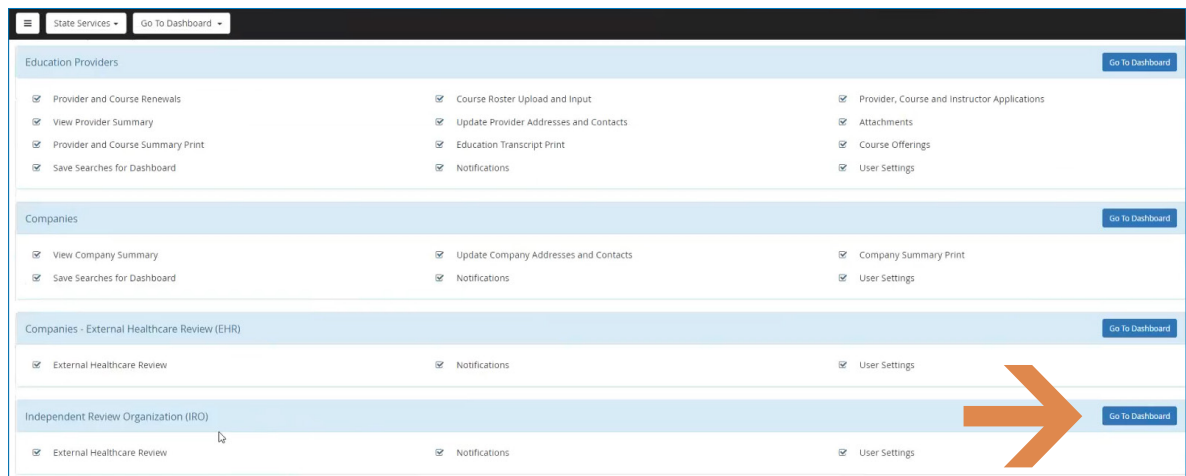
# SBS FOR ORGANIZATIONS • TRAINING GUIDE

## ➔ HOW DO I: MANAGE WORKFLOW AND CORRESPONDENCE OF EHR / IRO?

An individual has submitted a request for an External Healthcare Review (EHR). The State will assign an Independent Review Organization (IRO), and will notify the IRO with letter and a special PIN Number. It will be necessary for the IRO to create an account in SBS for Organizations, and access the case with the PIN Number. For more information about listing companies in SBS for Organizations, please see the guide “Add a Company Entity to My Account”.

### 1 Independent Review Organization

The IRO and Respondent will be notified that an IRO has been assigned. Log into the SBS for Organizations account, scroll down to Independent Review Organization (IRO) header and select Go to Dashboard.



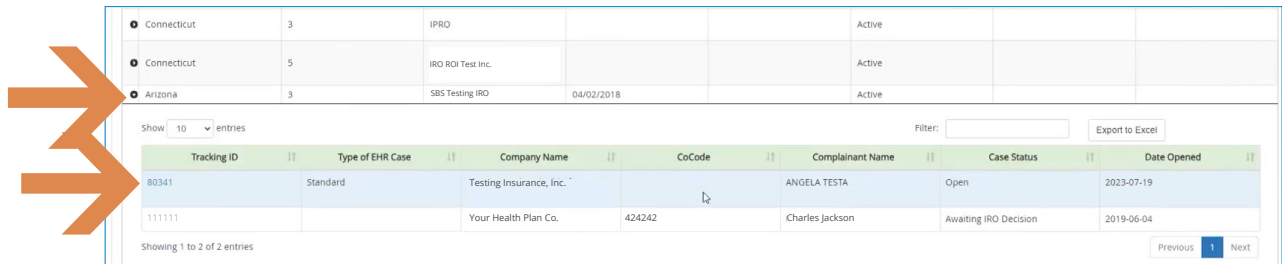
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## 2 Locate the case

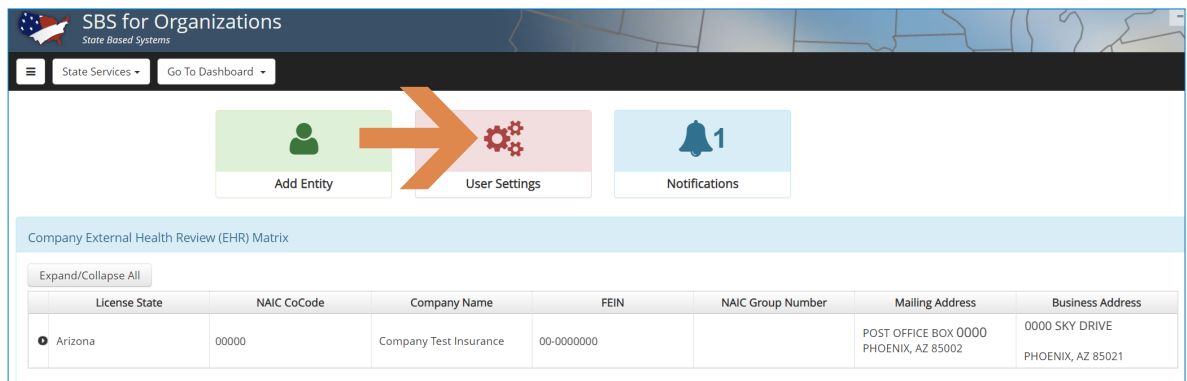
Under the IRO Matrix header, locate the Case. Expand the case information by clicking the arrow to the left of the State name to down position. Click on the Tracking ID number link to the new case.



Tracking ID	Type of EHR Case	Company Name	CoCode	Complainant Name	Case Status	Date Opened
80341	Standard	Testing Insurance, Inc.		ANGELA TESTA	Open	2023-07-19
111111		Your Health Plan Co.	424242	Charles Jackson	Awaiting IRO Decision	2019-06-04

## 3 User Settings - Notifications

3.1 Sign up for External Healthcare Review Notifications. On the Home Page, select the User Settings button.



SBS for Organizations  
State Based Systems

State Services | Go To Dashboard

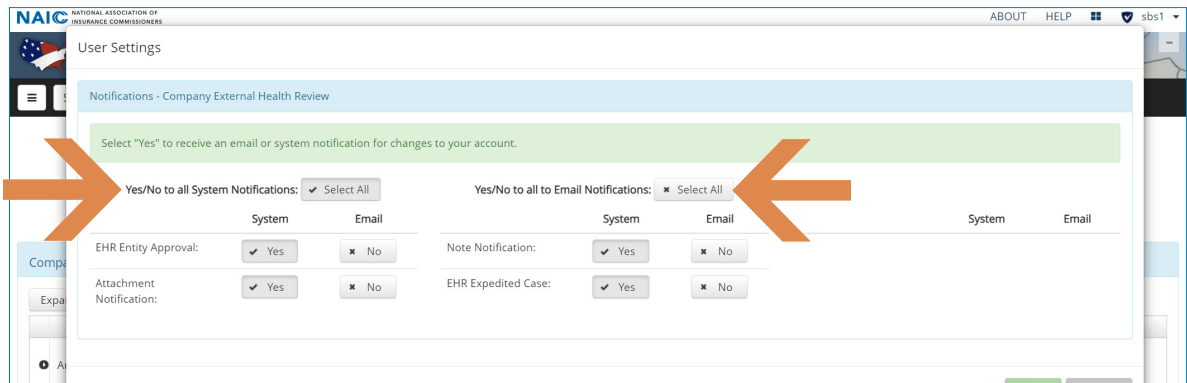
Add Entity | **User Settings** | Notifications

Company External Health Review (EHR) Matrix

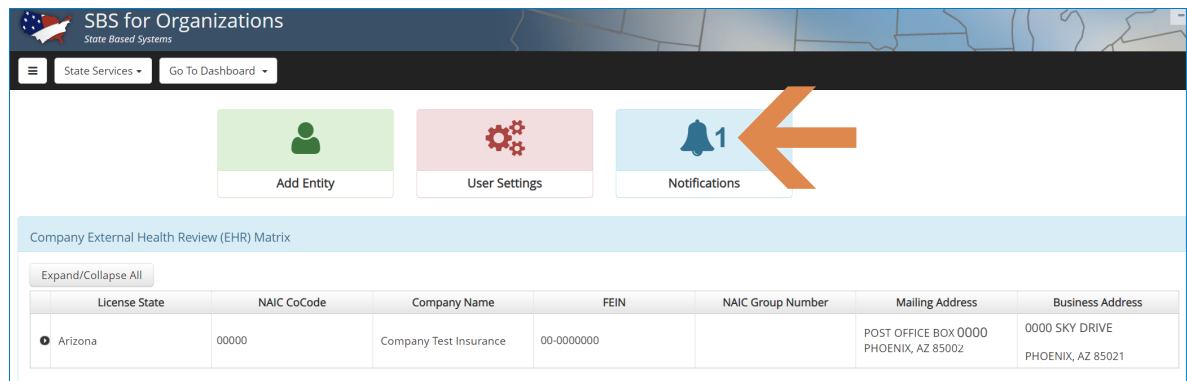
Expand/Collapse All

License State	NAIC CoCode	Company Name	FEIN	NAIC Group Number	Mailing Address	Business Address
Arizona	00000	Company Test Insurance	00-0000000		POST OFFICE BOX 0000 PHOENIX, AZ 85002	0000 SKY DRIVE PHOENIX, AZ 85021

### 3.2 Select Yes/No to all System Notifications or Email Notifications in alignment with your preferences.

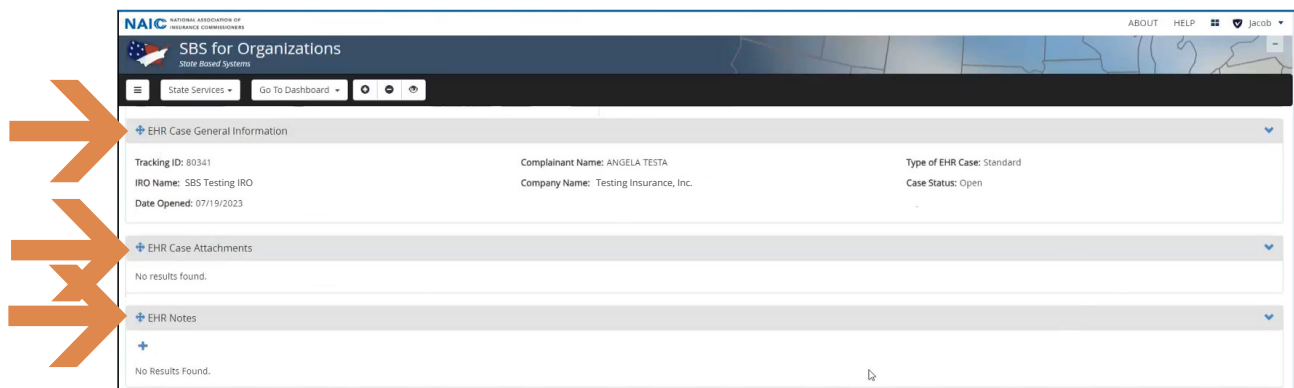


### 3.3 The screen below shows a received Notification.



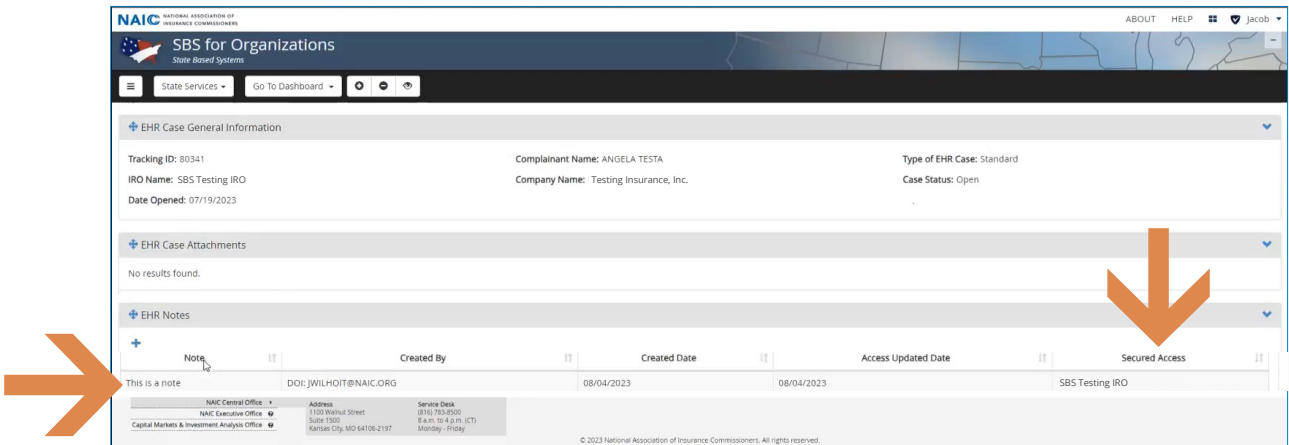
## 4 View Case Summary Information

Case Summary information includes the EHR Case General Information, EHR Case Attachments, and EHR Notes header. Communications between the State and the IRO, and the State and the Respondent come through EHR Notes and EHR Attachments. All communication will be logged here and will take place through the State creating access for the appropriate Entity to communications.



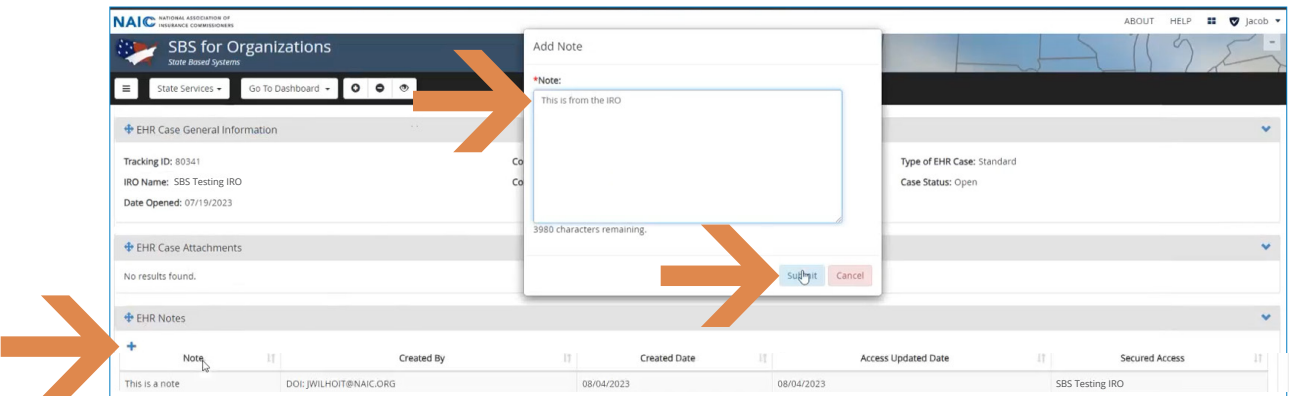
### 5 View Secure Note to IRO

Under the EHR Notes header, a new Note to the IRO has been added. The Secured Access information indicates the Entity(ies) with access. The process is the same for the Respondent as well.



### 6 Communication responses through EHR Notes

Responses back to the State may be added under the EHR Notes header. Select the Plus Sign and an Add Note box will open. Add content and select Submit. The process works the same for the Respondent (Company) to send a note back as well. These return responses that send notes back to the State will be logged under the EHR Notes header.



### 7 View Secure Attachment to IRO

Similar to Notes, attachments of documents may be sent through the EHR Case Attachments header. Below a new Attachment to the IRO has been added. Attachments could also be sent to the Respondent. The Secured Access column denotes what Entity (Entities) have access to the Attachment.

The screenshot displays the 'SBS for Organizations' interface. Under the 'EHR Case Attachments' section, a table lists an attachment:

File Name	Attached By	Attached Date	Access Updated Date	Secured Access
report - 2023-08-01T134652.208.pdf	DOI: JWILHOIT@NAIC.ORG	08/04/2023		SBS Testing IRO

Below this, the 'EHR Notes' section shows a table of notes:

Created Date	Created By	Notes Group	Entity	Notes
08/04/2023 09:09 AM	Jacob Wilhoit	Other	Testing Insurance, Inc.	This is a note

A second table below shows details for the note:

Note	Created By	Created Date	Access Updated Date	Secured Access
This is a note	DOI: JWILHOIT@NAIC.ORG	08/04/2023	08/04/2023	SBS Testing IRO

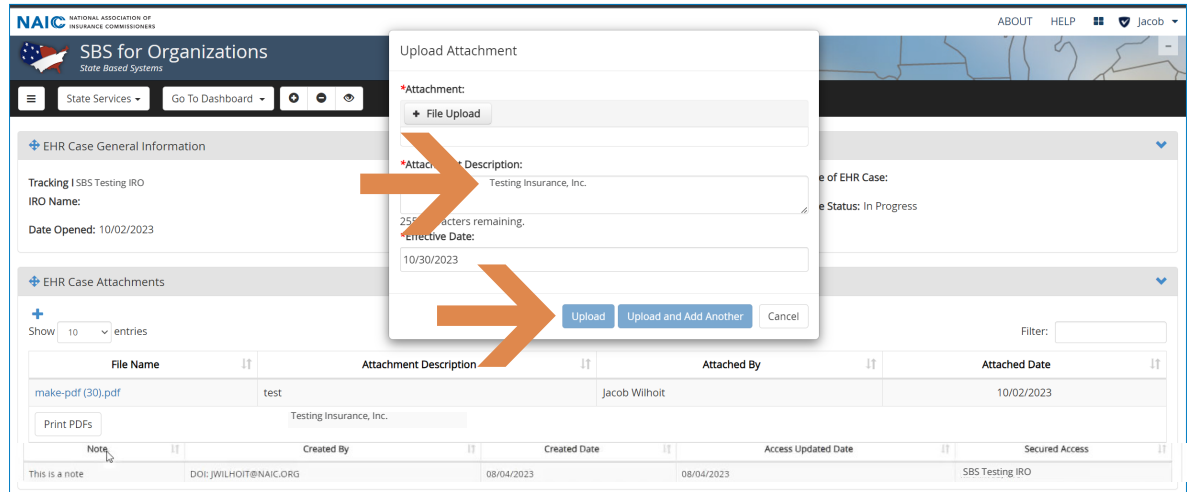
### 8 Communication responses through EHR Case Attachments

Responses requiring document(s) that are sent back to the State may be added under the EHR Case Attachments header. Select the Plus Sign and an Upload Attachment box will open.

The screenshot shows the same interface as above. An orange arrow points to the plus sign icon in the 'EHR Case Attachments' header, indicating where to click to add a new attachment.

### 9 Communication responses through EHR Case Attachments

In the Upload Attachment box, select the desired attachment and select Upload or Upload and Add Another. The process works the same for the IRO and the Respondent.



### 10 View all Case EHR Notes and Attachments.

View all the case Notes and Attachments from the Respondent and IRO under EHR Case Attachments and EHR Notes headers.

