Authorization Codes User Guide

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Authorization Codes

Authorization Codes

Authorization Codes are codes that indicate which services a client is authorized to receive. The codes you set up are displayed in *Treatment Plan*, *Authorization* document and *Authorization page*. The *Authorization* codes can be associated with *Procedure Codes* and *Billing Codes*. You can assign:

- One authorization code to many procedure codes
- Many authorization codes to one procedure code

If you assign the second scenario, many authorization codes to one procedure code, the client cannot have two of the same authorization code mapped to the same procedure code. If this happens, the system when creating billing for services cannot decide which authorization code to use.

From the *Authorization Codes* list page, you can: Add a New Authorization Code (See page 1) Change an Authorization Code (See page 2) Delete an Authorization Code (See page 4)

To Add a New Authorization Code

1. Follow this path: Administration > Billing Setup > Authorization Codes.

The Authorization Codes (##) list page is displayed. View field definitions (See page 8).

All Active	Code	es 🔻 Map to All	All Procedure Codes	All Billing Codes 🔹	Other Apply Filter	
uth ID	⊽	Display As	Units	Maps to PM Code	Maps to CM Code	
4		SS Disability	1.00 Encounter	rs Form 20		*
3		Supported Housing Milleu	1.00 Days	SupHsg Milleu Per Di		
2		Targeted Case Management	15.00 Minutes	CM Targ PCP Coord		
1		Personal Services	15.00 Minutes	Personal Srvc		
2		Flex Care Misc	1.00 Items	FC Bus Adult		
2		Non-Targ Case Management	15.00 Minutes	CM Non-Targ School		
1		Interpretive Services	15.00 Minutes	Interpretive Srvcs		
		Individual PES	15.00 Minutes	PsychoEd Individual		
i		Respite	15.00 Minutes	Respite Weekly		
í		Peer Support Group	15.00 Minutes	Peer Support Group		
ł		Assertive Outreach Travel	15.00 Minutes	AOT - Travel		
1		Medication Vivitrol	1.00 Items	Med Mng Vivitrol		
1		Residential Supportd Livg	1.00 Days	Supportive Living Da		
1		Urine/Drug Screening	1.00 Encounter	rs UA SelfPay Lab		
3		Group PES	15.00 Minutes	PsychoEd Group Sess		

2. Click on the **New** item icon from the task bar.

The Authorization Code Details page is displayed.

Authorization Code Details		Save 📔 🗮 🕱 🗑
Code Information		
Code Displ	ny As	
Active Unit	Internal (CP) External (Auth Codes)	
Practice Management	Care Management	
Add.	Add	
ID Procedure Code	ID Billing Code	
No data to display	No data to display	

3. Complete the fields on the screen. View <u>field definitions</u> (See page 9).

Important: When you set up unit measurement, it is important that the unit measurement matches the unit measurement set up in *Procedure Codes* that the *Authorization code* will be assigned to. This match is needed for the units to be counted correctly against services. Show me the mapping. (See page 11)

- 4. Select the **procedure codes** you want to associate with this authorization code. <u>Tell me how...</u> (See page 7)
- 5. Select the **billing codes** you want to associate with this authorization code. <u>Tell me how...</u> (See page 6)
- 6. When the information for this authorization code is complete, click the Save button.
- 7. To add another authorization code, click the **New** item icon.
- 8. To exit from this page, click the **Exit** ^A icon.

The Authorization Codes list page is displayed.

To Change an Authorization Code

Use this procedure to:

- Add additional procedure code(s) and/or billing code(s) to the Authorization code
- Delete assigned procedure code(s) and/or billing code(s) form the Authorization code
- 1. Follow this path: Administration > Billing Setup > Authorization Codes.

The Authorization Codes (##) list page is displayed. View <u>field definitions</u> (See page 8).

Author	riza	tion Codes (88)					* 🗯 🗋 📳 🗄
All Active	Cod	es 🔻 Map to All	All Procedure Codes	All Billing Codes	Other Apply Fil	er	
Auth ID	▽	Display As	Units	Maps to PM Code	Maps to CM Code		
14		SS Disability	1.00 Encount	ers Form 20			
13		Supported Housing Milieu	1.00 Days	SupHsg Milleu Per D	0		
12		Targeted Case Management	15.00 Minute	s CM Targ PCP Coord			
1		Personal Services	15.00 Minute	s Personal Srvc			
Q		Flex Care Misc	1.00 Items	FC Bus Adult			
9		Non-Targ Case Management	15.00 Minute	s CM Non-Targ Schoo	1		
8		Interpretive Services	15.00 Minute	s Interpretive Srvcs			
7		Individual PES	15.00 Minute	s PsychoEd Individual			
6		Respite	15.00 Minute	s Respite Weekly			
5		Peer Support Group	15.00 Minute	s Peer Support Group			
14		Assertive Outreach Travel	15.00 Minute	s AOT - Travel			
3		Medication Vivitrol	1.00 Items	Med Mng Vivitrol			
<u>0</u>		Residential Supportd Livg	1.00 Days	Supportive Living Da	1		
9		Urine/Drug Screening	1.00 Encount	ers UA SelfPay Lab			
8		Group PES	15.00 Minute	s PsychoEd Group Ses	5		

- 2. Filter the list to determine the records that are displayed. Tell me how...
- 3. Click on the hyperlinked Auth ID code that you want to change.

The Authorization Code Details page is displayed. View <u>field definitions</u> (See page 9).

Code Informa	tion				
Code Target	ed Case Management	Display As Ta	rgeted Case Manag	ement	
Active Ur	iit 15.00 Minutes	▼ 🗷 Inter	mal (CP) 🕑 Extern	ial (Auth Codes)	
Practice Man	agement		Care Manag	ement	
Add CM	Targ PCP Coord		Add.		
ID	Procedure Code		ID	Billing Code	
× 232	CM Targeted				
X 233	CM Targeted School			No data to display	
X 234	CM Targ PCP Coord		L		
X 235	CM Targ PCP. School				
					- Kr

5. Make changes to the fields on the screen.

Important: When you set up unit measurement, It is important that the unit measurement matches the unit measurement set up in *Procedure Codes* that the *Authorization code* will be assigned to. This match is needed for the units to be counted correctly against services. Show me the mapping. (See page 11)

6. Select additional **procedure codes** you want to associate with this authorization code. <u>Tell me</u> <u>how...</u> (See page 7)

- 7. To delete an associated *Procedure Code*, find the **code** in the list in the *Practice Manage* section and click the icon. Click the **OK** button in the *Confirmation Message* window.
- 8. Select additional **billing codes** you want to associate with this authorization code. <u>Tell me how...</u> (See page 6)
- 9. To delete an associated Billing Code, find the code in the list in the Care Manage section and
 - click the **OK** button in the *Confirmation Message* window.
- 10. When the information for this authorization code is complete, click the Save button.

11. To add another authorization code, click the New item icon

12. To exit from this page, click the **Exit** ^A icon.

The Authorization Codes list page is displayed.

To Delete an Authorization Code

Use this procedure to delete an authorization code in its entirety. If you just want to delete a procedure code or billing code, refer to <u>To Change an Authorization Code</u> (See page 2) in steps 7 and 9.

1. Follow this path: Administration > Billing Setup > Authorization Codes.

The Authorization Codes (##) list page is displayed. View field definitions (See page 8).

Autho	rizati	on Codes (88)				🖈 🚖 🖬 🖿 🗶
All Active	e Codes	▼ Map to All	▼] [All Procedure Codes ▼] [A	NI Billing Codes 🔹 🔹	Other Apply Filter	
Auth ID	⊽ [<u>Xisplay As</u>	Units	Maps to PM Code	Maps to CM Code	
44	9	iS Disability	1.00 Encounters	Form 20		*
43	5	Supported Housing Milieu	1.00 Days	SupHsg Milleu Per Di		
42	3	argeted Case Management	15.00 Minutes	CM Targ PCP Coord		
41	F	Personal Services	15.00 Minutes	Personal Srvc		
40	F	lex Care Misc	1.00 Items	FC Bus Adult		
39	P	Ion-Targ Case Management	15.00 Minutes	CM Non-Targ School		
38	I	nterpretive Services	15.00 Minutes	Interpretive Srvcs		
37	I	ndividual PES	15.00 Minutes	PsychoEd Individual		
36	F	Respite	15.00 Minutes	Respite Weekly		
35	F	Peer Support Group	15.00 Minutes	Peer Support Group		
34	1	Assertive Outreach Travel	15.00 Minutes	AOT - Travel		
33	P	fedication Vivitrol	1.00 Items	Med Mng Vivitrol		
30	F	Residential Supportd Livg	1.00 Days	Supportive Living Da		
29	l	Jrine/Drug Screening	1.00 Encounters	UA SelfPay Lab		
28	(Froup PES	15.00 Minutes	PsychoEd Group Sess		

- 2. Filter the list to determine the records that are displayed. Tell me how...
- 3. Click on the hyperlinked Auth ID code that you want to delete.

The Authorization Code Details page is displayed. View field definitions (See page 9).

Code Targeted Case Management Display As Targeted Case Management Minutes Internal (CP) External (Auth Codes) ractice Management Add To Procedure Code X 232 CM Targeted School X 233 CM Targeted School No data to display X 235 CM Targe PCP Coord No data to display	Code Informa	ition				
Active Unit 15.00 Minutes Active Unit 15.00 Minutes Internal (CP) External (Auth Codes) Add Care Management Add ID Procedure Code Add X 232 CM Targeted School X 233 CM Targeted School X 234 CM Target PCP Coord X 235 CM Target PCP. School	Code Target	ed Case Management	Display As T	argeted Case Manag	ement	
Add Care Management Add ID ID Procedure Code X 232 CM Targeted X 233 CM Targeted School X 234 CM Targ PCP Coord X 235 CM Targ PCP. School	Active Ur	iit 15.00 Minutes	 ✓ Inte 	ernal (CP) 🕑 Extern	nal (Auth Codes)	
Add CM Targ PCP Coord ID Procedure Code X 232 CM Targeted School X 233 CM Targeted School X 234 CM Targ PCP Coord X 235 CM Targ PCP. School	Practice Man	agement		Care Manag	ement	
ID Procedure Code X 232 CM Targeted X 233 CM Targeted School X 234 CM TargetPC Coord X 235 CM Targ PCP. School	Add CM	Targ PCP Coord		Add	an 100 on to 31	
X 232 CM Targeted X 233 CM Targeted School X 234 CM Targeted School X 234 CM Targ PCP Coord X 235 CM Targ PCP. School	ID	Procedure Code		ID	Billing Code	
X 233 CM Targeted School No data to display X 234 CM Targ PCP Coord X 235 CM Targ PCP. School	× 232	CM Targeted			1. 1977 IN	
X 234 CM Targ PCP Coord X 235 CM Targ PCP. School	X 233	CM Targeted School			No data to display	
X 235 CM Targ PCP. School	X 234	CM Targ PCP Coord				
	X 235	CM Targ PCP. School				

4. Click the **trash can** icon in the task bar.

The Confirmation Message window is displayed.

5. Click the **Yes** button in the *Confirmation Message* window.

The Authorization Codes list page is displayed.

Why can't I access these screens? (See page 14)

Add a Billing Code to the Authorization Code

1. From the *Authorization Code Details* page, click the **Add** button in the *Care Management* section.

The Billing Code window is displayed.

SmartCa	re	2 🔀
🗌 Sele	ect All	
	Billing Code	
	CLS H2015	
	Family Therapy	
	ICU - Psychiatric	
	Ind Therapy - 53 min	
	Ind Therapy 16-37 min	
	Ind Therapy w/Pharm Mng 30-4	
	Ind Therapy w/Pharm Mng 45-5	
	Ind Therapy w/Pharm Mng 60 m	
	Individual Therapy	
	Interative Complexity	
	Neuropsych Testing	
	Pharm Mng - Complexity 2	
	Pharm Mng - Complexity 3	
	Pharm Mng - Complexity 4	
	Pharm Mng - Complexity 5	
	Psych Eval - LMHT	
	Psych Eval - MD/APRN	
	Psych Rehab Services - Inten	_

- 2. Click the **Select All** option box to select all billing codes listed in the window. You can then deselect any you do not want. Or, select each billing code option box individually.
- 3. Click the **OK** button to save your selection(s).

The *Authorization Code Details* page is displayed with the billing code(s) you selected appearing in the list.

Why can't I access these screens? (See page 14)

Add a Procedure Code to the Authorization Code

1. From the *Authorization Code Details* page, click the **Add** button in the *Practice Management* section.

The *Procedure Code* window is displayed.

martC	are	· ? 🗙
Sé	elect All	
	Procedure Code	
	90840	18
	99354	-
	99355	
	ACE Medical Rec Copy	
	ACE Memory Testing	
	ACE Psych Test 20 M	
	ACE Special Reports	
	ACE WAIS IQ Testing	
	Add On Int Comp	
	Add On PharMng w/Ind	
	Add On THIth Fac Fee	
	Add On Vivitrol Inj	
	AOT - Travel	
	AP Group Therapy	
	AP Group Therapy Sub	
	AP-Individual Tx	
	AP-Initial Diag Asmt	
	OK Cancel	

- 2. Click the **Select All** option box to select all procedure codes listed in the window. You can then deselect any you do not want. Or, select each procedure code option box individually.
- 3. Click the **OK** button to save your selection(s).

The *Authorization Code Details* page is displayed with the procedure code(s) you selected appearing in the list.

Why can't I access these screens? (See page 14)

Field Definitions

Autho	riza	tion Codes (88)				
All Active	Code	es ▼ Map to All	▼ All Procedure Codes ▼ All	Billing Codes 🔹 🖣 🗌	Other 🔹 🚺	Illor
Auth ID	V	Display As	Units	Maps to PM Code	Maps to CM Code	
44		SS Disability	1.00 Encounters	Form 20		-
<u>43</u>		Supported Housing Milieu	1.00 Days	SupHsg Milieu Per Di		
42		Targeted Case Management	15.00 Minutes	CM Targ PCP Coord		
41		Personal Services	15.00 Minutes	Personal Srvc		
40		Flex Care Misc	1.00 Items	FC Bus Adult		
39		Non-Targ Case Management	15.00 Minutes	CM Non-Targ School		
38		Interpretive Services	15.00 Minutes	Interpretive Srvcs		
37		Individual PES	15.00 Minutes	PsychoEd Individual		
36		Respite	15.00 Minutes	Respite Weekly		
35		Peer Support Group	15.00 Minutes	Peer Support Group		
34		Assertive Outreach Travel	15.00 Minutes	AOT - Travel		
33		Medication Vivitrol	1.00 Items	Med Mng Vivitrol		
30		Residential Supportd Livg	1.00 Days	Supportive Living Da		
29		Urine/Drug Screening	1.00 Encounters	UA SelfPay Lab		
28		Group PES	15.00 Minutes	PsychoEd Group Sess		

Authorization Codes List Page Field Definitions

An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Filter	
	Select an option to filter the list to view:
All Active Codes	All Active Codes
All Active Codes	All Inactive Codes
	All Active and Inactive Codes
	Authorization codes can be mapped to certain types of codes. Select an option to filter the
	list to view codes:
Map to All	• Map to All
	 Maps only to Practice Management Codes
	Maps only to Care Management Codes
All Procedure	Select an option to filter the list to view:
Codes	All Procedure Codes the authorization code is assigned to
Coues	 Individual procedure code selected from the list
	Select an option to filter the list to view:
All Billing Codes	 All Billing Codes the authorization code is assigned to
	Individual billing code selected from the list
Other	Select an option to filter the list to view:
Oulei	Custom filter set up for your system
List	
Auth ID	Identifies the ID assigned by the system to the authorization code when it is set up in the
	system. Click on the hyperlinked code to change or delete it.
Display As	Identifies the display name of the code.
Units	Identifies the units for billing the service set up for the authorization code.
Maps to PM	Identifies the whether the authorization code maps to a Practice Management code and the
Code	code is maps to.
Maps to CM	Identifies the whether the authorization code maps to a Care Management code and the
Code	code is maps to.

ode Information				
ode	Display As			
Active Unit	• Internal (CP)	Extern	al (Auth Codes)	
ractice Management	Car	e Manag	ement	
ID Procedure Code		ID	Billing Code	
No data to display			No data to display	

Authorization Code Details Page Field Definitions

An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description		
Code Information			
Code*	Enter the authorization code name. You can enter up to 100 characters.		
Display As*	Enter the description of the authorization code that you want to appear		
	throughout the system. You can enter up to 24 characters.		
	Identifies whether the authorization code is usable or not. Check the box to		
Active	make the authorization code usable; deselect the box to make the authorization code unusable.		
	Identifies the unit amount for how this authorization code is used. This unit		
Unit	amount is used with the unit type. For example, 15 minutes, 1 item, 1 unit.		
	Identifies the unit type for how this authorization code is used. The unit type is		
	used with the unit amount to define the authorized billing amount. Unit types		
(unit)	are:		
	• Davs		
	• Encounters		
	Hours		
	• Items		
	Minutes		
	It is important that the unit measurement match the unit measurement set up in		
	Procedure Codes that the Authorization Code will be assigned to. Show me the		
	mapping. (See page 11)		
Internal (CP)	The check box identifies an authorization code that is used in the Care Plan		
	document to authorize procedures for the client's care.		
External (Auth	An external authorization code identifies those procedure codes that a payer or		
Codes)	plan authorizes payment.		
Practice			
Management			

Field	Description
Add Add	Click the Add button to select the procedure codes that this authorization code applies to. <u>Tell me how</u> (See page 7)
ID	Identifies the procedure code ID assigned by the system.
Procedure	Identifies the Display As name of the procedure code.
Care	
Management	
Add	Click the Add button to select the billing codes that this authorization code
Add	applies to. <u>Tell me how</u> (See page 6)
ID	Identifies the billing code ID assigned by the system.
Billing Code	Identifies the <i>Display As</i> name of the billing code.

Mapping Authorization Codes to Procedure Codes Units

It is important that the *Authorization code* unit measurement matches the unit measurement set up for the *Procedure Codes* that the *Authorization code* will be assigned to. If the unit measurement unit types do not match, billing for services may fail.

The following table displays how the unit measurements map from *Authorization Codes* to *Procedure Codes*:

Authorization Code Unit Type	Procedure Code Unit Type	
Minutes	Minutes	
Hours	Hours	
Encounters	Minutes, Hours	
Days	Days	
Items	Items	
Mg	Mg	
Miles	Miles	
Units	Units	
Trips	Trips	
Injections	Injections	

Miscellaneous

Filter a List Page

A list page displays a list of all the content categories on the page. Using the filters you can narrow the list of information that you view. The filters vary depending on the content of the list.

1. Follow a path from a banner selection to display a list page.

The list page is displayed

- 2. In the drop-down lists in the *Filter* box, select the items in each drop-down list to limit what is displayed on the page.
- 3. Click the **Apply Filter** button.

Note: The filter that you apply to that page remains until you change the filters and click the *Apply Filter* button again.

4. When the list is displayed, click on a **hyperlinked item** to view the detail page for that item.

Why Can't I Access a Screen?

You can only access screens that your user sign on has been granted access to. This property is referred to as *Permissions*. Use the table below to find the screen you need access to and determine the Permissions that are needed. To solve this, you need to discuss this issue with your system administrator to have the Permissions changed.

To access Permissions:

1. Follow this path: Administration > User/Role Setup > Role Definition.

The *Role Definition* page is displayed. View <u>field definitions</u>. (See page 14)

From the *Permissions* page, you can:

Determine Which Permissions Are Needed for the Authorization Codes List Page

You Need Permission Type	Parent	Permission Item
Banners	Administration	Authorization Codes (Authorization
Damiers		Codes)
Banners	My Office	ChargesAndClaims (Charges/Claims)
Screen (New Mode)	Auth Codes	Export
Screen (New Mode)	Auth Codes	New
Screen (Update Mode)	Auth Codes	Export
Screen (Update Mode	Auth Codes	New
Screens	Utilization Management	Authorization Code Details

Role Definitions Page Field Definitions

Roles	Add Role	Permission Utilities		
	*	Select a role to use the utilities bei Copy permissions from one role to Remove permissions from selected Grant complete access to selected	low selected role I role role	
Health Maintenance Alert Intake LCM				
Default Permissions for Selected Role				
Select Permission Type	Select Parent	▼ All	*	Apply Filter

An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Roles	
Roles	All roles defined in the system. A role defines a collection of permissions to make it easier to assign permission to each staff member who will use the system. Permissions are assigned to staff to give them permission to access list pages, screens and windows in SmartCare.
Add Role	Click the Add Role button to add a new role to the system and assign permissions to
Add Role	that role.
Default Permissions for Sel	lected Role
Select Permission Type	Use this drop down list to display one permission type for the selected role.
Select Parent	Use this drop down list to select a specific parent type to view.
All	Use this drop down list to select to view all permissions, Granted permissions or Denied permissions for the selected role.
Permission Utilities	·
Selected Role	This field appears if you have selected a role in the <i>Roles</i> section.
Copy permissions from one role to selected role	Click the hyperlink to copy permissions set up for one role to the Selected Role. When you click the Save button, all permission are copied from the role you select in the <i>Copy Permission from</i> drop down list. However, If there are permission already set up on the <i>Selected Role</i> , these permission are not overridden.
Remove permissions from selected role	Use this option to remove all permissions from the selected role.
Grant complete access to the selected role	Use this option to grant all permissions in the system to the selected role.