

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**.

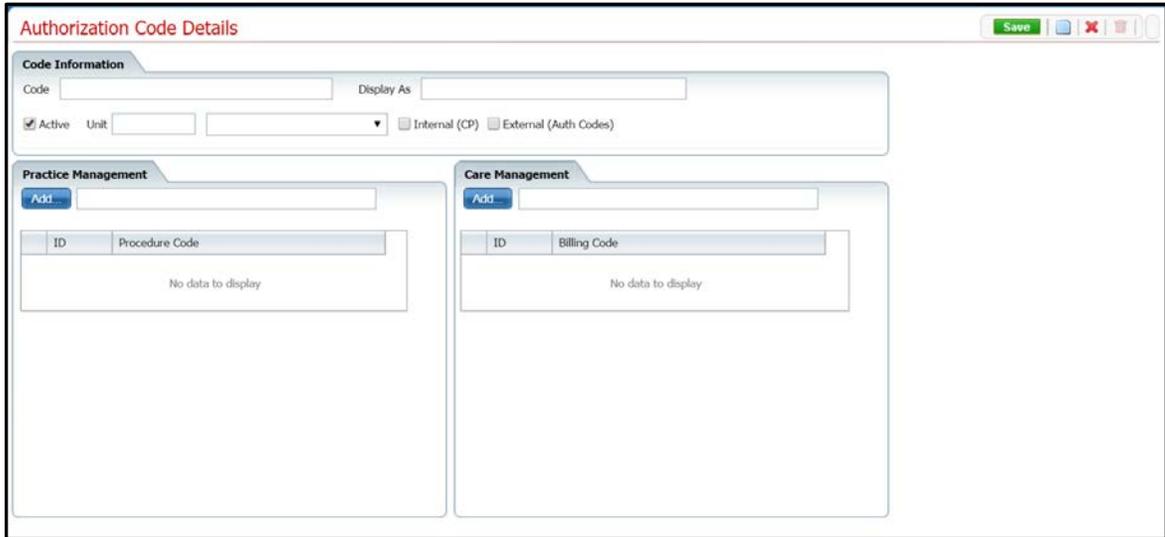
The *Authorization Codes* (##) list page is displayed. View [field definitions](#) (See page 8).



Auth ID	Display As	Units	Maps to PM Code	Maps to CM Code
44	SS Disability	1.00 Encounters	Form 20	
43	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 Svc	
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 Svcs	
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	

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

The *Authorization Code Details* page is displayed.



3. Complete the fields on the screen. View [field definitions](#) (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. [Tell me how...](#) (See page 7)
5. Select the **billing codes** you want to associate with this authorization code. [Tell me how...](#) (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**  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 [field definitions](#) (See page 8).

Auth ID	Display As	Units	Maps to PM Code	Maps to CM Code
44	SS Disability	1.00 Encounters	Form 20	
43	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	Asserbtive Outreach Travel	15.00 Minutes	AOT - Travel	
33	Medication Vivitrol	1.00 Items	Med Mng Vivitrol	
30	Residential Supported Livng	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	

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 [field definitions](#) (See page 9).

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. [Tell me how...](#) (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. [Tell me how...](#) (See page 6)
9. To delete an associated *Billing Code*, find the **code** in the list in the *Care Manage* section and click the  icon. 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**  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 [To Change an Authorization Code](#) (See page 2) in steps 7 and 9.

1. Follow this path: **Administration** ▶ **Billing Setup** ▶ **Authorization Codes**.

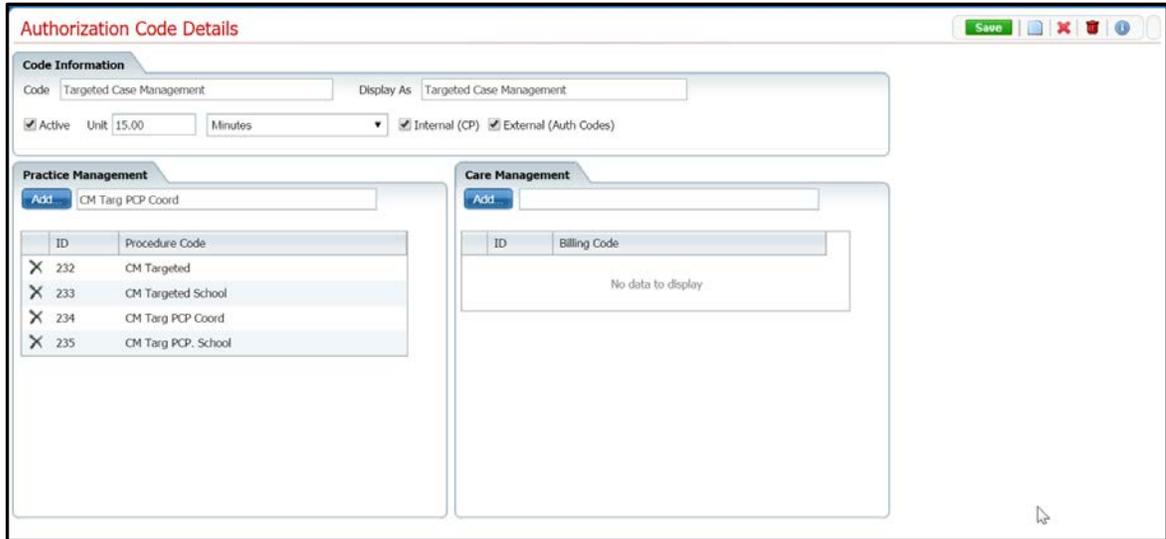
The *Authorization Codes* (##) list page is displayed. View [field definitions](#) (See page 8).



Auth ID	Display As	Units	Maps to PM Code	Maps to CM Code
44	SS Disability	1.00 Encounters	Form 20	
43	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 Srvc	
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	

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).



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.

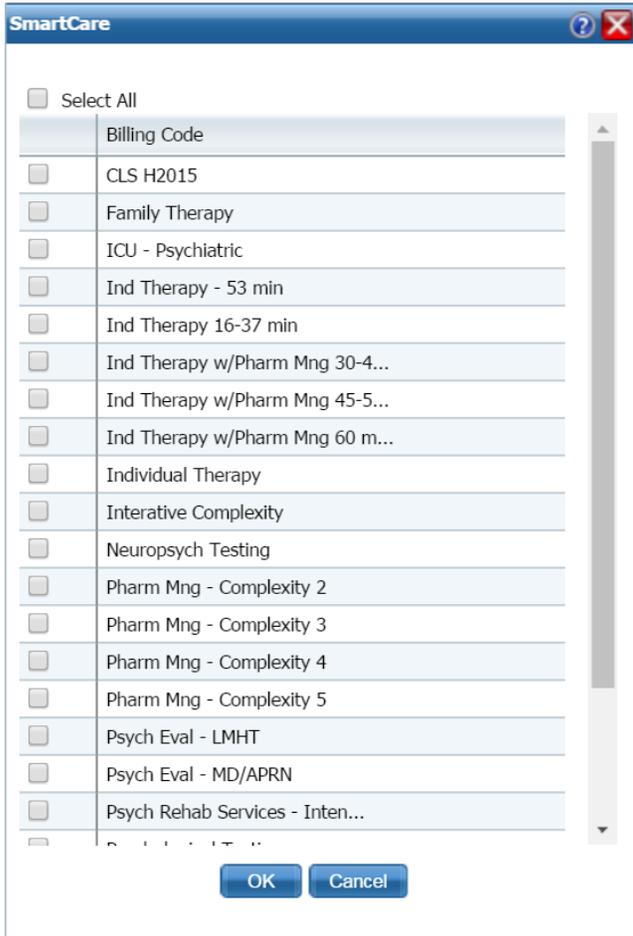
The *Authorization Codes* list page is displayed.

[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.



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).

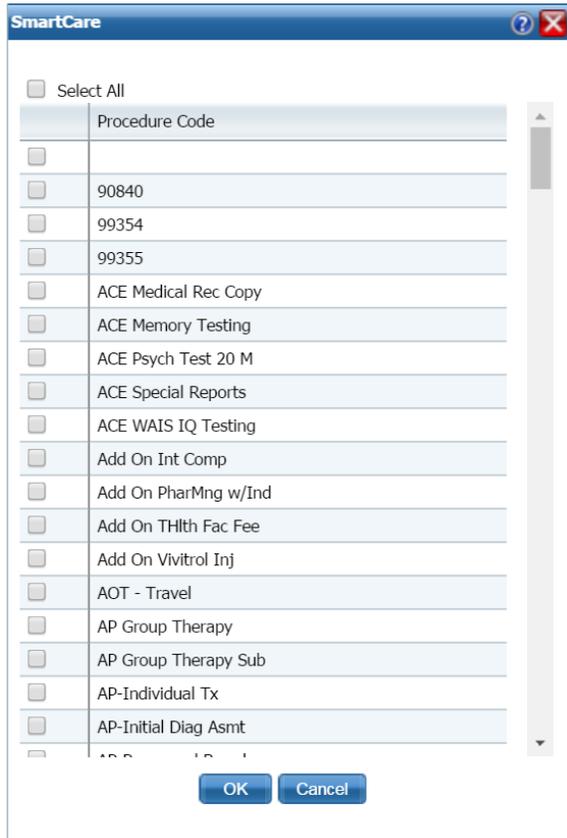
The *Authorization Code Details* page is displayed with the billing code(s) you selected appearing in the list.

[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.



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

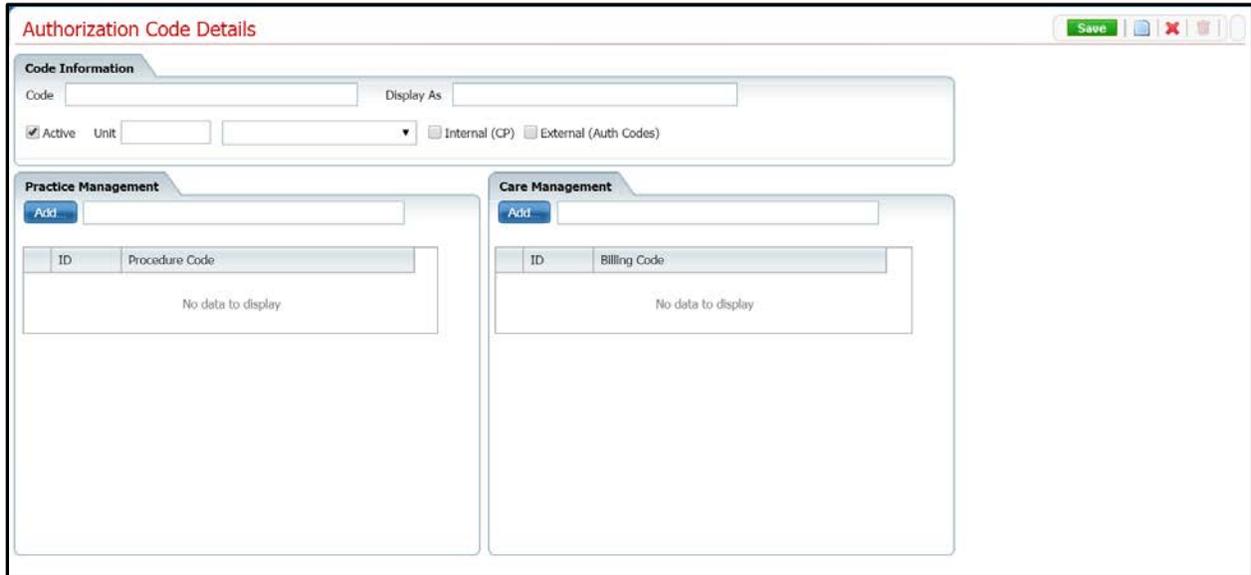
Authorization Codes List Page Field Definitions

Auth ID	Display As	Units	Maps to PM Code	Maps to CM Code
44	SS Disability	1.00 Encounters	Form 20	
43	Supported Housing Milieu	1.00 Days	SupHsg Milieu Per Di	
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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	

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	
All Active Codes	Select an option to filter the list to view: <ul style="list-style-type: none"> All Active Codes All Inactive Codes All Active and Inactive Codes
Map to All	Authorization codes can be mapped to certain types of codes. Select an option to filter the list to view codes: <ul style="list-style-type: none"> Map to All Maps only to Practice Management Codes Maps only to Care Management Codes
All Procedure Codes	Select an option to filter the list to view: <ul style="list-style-type: none"> All Procedure Codes the authorization code is assigned to Individual procedure code selected from the list
All Billing Codes	Select an option to filter the list to view: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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 Code	Identifies the whether the authorization code maps to a Practice Management code and the code is maps to.
Maps to CM Code	Identifies the whether the authorization code maps to a Care Management code and the code is maps to.

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.
Active	Identifies whether the authorization code is usable or not. Check the box to make the authorization code usable; deselect the box to make the authorization code unusable.
Unit	Identifies the unit amount for how this authorization code is used. This unit amount is used with the unit type. For example, 15 minutes, 1 item, 1 unit.
(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 are: <ul style="list-style-type: none"> • Days • Encounters • Hours • Items • Minutes It is important that the unit measurement match the unit measurement set up in <i>Procedure Codes</i> that the <i>Authorization Code</i> 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 Codes)	An external authorization code identifies those procedure codes that a payer or plan authorizes payment.
Practice Management	

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

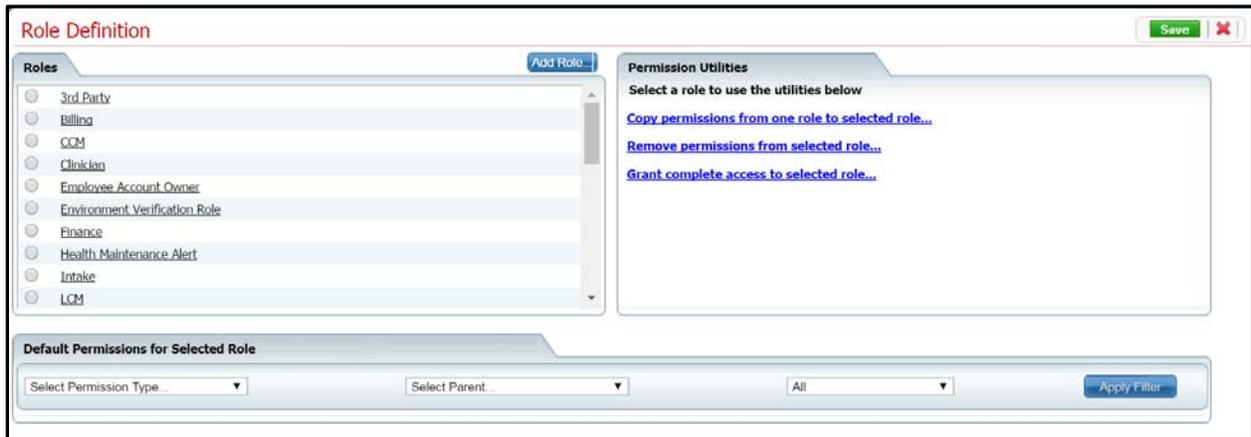
The *Role Definition* page is displayed. View [field definitions](#). (See page 14)

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 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



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 that role.
Default Permissions for Selected 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.