FSFN Service Authorization Enhancements

April 2014
Agenda

This training module is divided into the following topics:

• Topic 1: Request Service Authorization
• Topic 2: Complete Service Authorization
• Topic 3: View Service Authorization
• Topic 4: Maintain Service Sub Categories and Service Types
• Topic 5: Business Objects and Check Write File
• Available Reference Information
FSFN Service Authorization Enhancements: Introduction

Service Authorization Module

- The Service Authorization module provides Case Managers with the ability to request a service from the Case Plan Worksheet Outcomes tab or from Create Case Work.

- A Utilization Management (UM) or Fiscal Worker reviews and approves before a Service or Payment Request is authorized.

- Expanded use of Service Categories, Sub Categories and Service Types
Topic 1: Request Service Authorization

- Initiate via Case Plan Worksheet page Outcomes tab
- Initiate via Create Case Work
- Fill out request
- Attach supporting documentation (Imaging)
- Submit for approval
- Review request status
Request Service Authorization: Case Plan Worksheet Page

- Case Plan Worksheet Outcomes tab Authorization hyperlink is enabled when Service Referral Request Needed is “Yes” and initiates a Service Authorization Request.
- Case, Participant, Service Category, and Service Sub Category prefill from the Outcomes tab.
- Authorization Details including Status, Service Category, Sub Category, Provider, Units and Amounts are presented on each Task as view-only fields for user’s reference.
- When the Status is “Authorized”, if the Authorization Provider, Service Category or Sub Category differ from the Task values, the user may use the Accept hyperlink to update the Task values to match the Authorization value.
- Case Plan Document only shows the values for Provider, Service Category and Sub Category on the Task.
Request Service Authorization: Create Case Work and Financial Work Pages

- Create a Service Authorization Request using the Create Case Work Page, Placement/Services drop down, Service Authorization option.
- Use Create Case Work when a Service Authorization is needed that is not related to a Case Plan Worksheet Outcome Task.
- Use Create Case Work when an Authorization is needed for a Case Plan Task (as opposed to a Case Plan Worksheet Outcome Task).
- Creating a Service Authorization from the Create Case Work option does not create a link to the Case Plan Worksheet Task or to a Case Plan Task.
- Authorized users (e.g. Fiscal Workers, Fiscal Supervisors, and Utilization Managers) have the option to create a Service Authorization without an assignment to a case using Financial Work, Placement/Service drop down, Service Authorization option.
Request Service Authorization: Service Authorization Page

- Case Manager uses the Service Authorization page Request tab to create a Service Authorization Request for services that require authorization.
- Case Manager submits completed Request to his/her supervisor for review and approval.
- Supervisor approves and routes to their Fiscal/Utilization Management unit for authorization.
- Case Manager includes relevant attachments with Request, such as a budget.
Request Service Authorization:
Service Authorization Page Request Tab

- Service Authorization page has two tabs:
  - Service Request tab used to create the request
  - Service Authorization tab used to authorize the request

- User enters detail regarding the request as needed:
  - Units and dates
  - Justification and Special Instructions/Consideration
  - Benefiting Children – applies only when the Participant is an adult
Request Service Authorization: Image Page & Image History Page

- Supporting documentation can be attached to the request using the Upload Images hyperlink in the Actions list box of the Service Authorization page to launch the Image page.

- The Image page enables users to attach scanned documents to the Service Authorization Request page using the Service Authorization image category.

- The View Attachments hyperlink in the Actions list box of the Service Authorization page launches the Image History page.

- The Image History page allows users to retrieve scanned documents attached to the Service Authorization Request page.
Request Service Authorization: Approval Functionality

- The Approval hyperlink in the Actions list box of the Service Authorization page launches the Approval pop-up, allowing the Service Authorization Request to be routed to the Supervisor for approval.

- Once approved by Case Supervisor or Program Manager, the request status is updated to “Authorization Needed” for Fiscal or Utilization Management Unit review and approval.
Sample:
Case Plan Worksheet Page Outcomes Tab
Sample:
Service Authorization Page Request Tab
Sample: Image Page & Image History Page
Sample: Create Case Work Page
Topic 1: FSFN System Demo
Request Service Authorization
Topic 2: Complete Service Authorization

- Access Service Requests via Financial Activity page
- Review request and complete Service Authorization
- Generate Provider Referral
- Access Service Authorizations via Financial Activity page in order to generate Payment Activity
- Access Payment Activity page to pay provider invoices
Complete Service Authorization:
Financial Activity Page

- Financial Activity is a new page accessed directly from the main menu.
- Utilization Management and Fiscal Workers use this page to access Service Authorization requests in order to review and authorize.
- Criteria: Search by Fiscal Agency for Service Authorization page with “Authorization Needed” status, and Begin Date From less than earliest Request From Date.
- Results: Edit hyperlink in the Action column opens the Service Authorization page.
Complete Service Authorization: Service Authorization Page Authorization Tab

• Using the Service Authorization tab on the Service Authorization page, the Fiscal or UM Worker reviews and approves the service request.
• Information on the Service Request tab pre-fills the Service Authorization tab and remains editable.
• Once approved, the Payment Activity page is available in order to generate payments or set up ongoing services for this Service Authorization.
Complete Service Authorization: Provider Referral Template

- The Provider Referral hyperlink in the Text list box of the Service Authorization page launches the Provider Referral template.
- The Provider Referral template can be used as the document to notify the provider of the terms of the authorized service including participant, type of service, number and type of units, and time period.
Complete Service Authorization: Financial Activity Page

- Existing Service Authorizations are accessed from the Financial Activity page.
- Search by Fiscal Agency for Service Authorization page, Status of “Authorized”, and Begin Date From less than earliest Request From Date
- Results: Edit hyperlink opens existing Service Authorization page to perform one of the following functions:
  - Make a payment via the Payment Activity page
  - Change status to complete once authorization period is past
Complete Service Authorization: Payment Activity Page

The Payment Activity Page launches from the Payment Activity hyperlink in the Actions list box of the Service Authorization page.

- This new page is used to create payments or services.
- The Payment Activity hyperlink is only visible and available once the Service Authorization has a status of “Authorized”.

**Note:** The Payment Activity page is covered in the Process Payments training material.
Complete Service Authorization: Copy Feature

When using Copy, information pre-populates from the existing Service Authorization, such as:

- **Case Information**: Participant, Case, Fiscal Agency, Request Date.
- **Request Information**: Service Category, Sub Category, Unit Type, Rates, Amounts, Dates, Status, Reason, Justification and Instructions.
- **Link to Case Plan Worksheet**, if exists.
  - For copy, link is to worksheet, not a particular task
  - A Copy of a Case Plan Worksheet Task’s Service Authorization is provided to support an extension of an existing authorization. In general, Case Managers create a new task and associated authorization for a new period.

- **Request Benefiting Children**.
- **Note**: Approval does not copy.
Sample: Service Authorization Page Authorization Tab
Sample:
Provider Referral

02/12/2014

Provider Name
Provider Address
Provider City, State, Zip

Authorization ID: 2093847

Dear Sir or Madam:

First M. Last is approved to receive the below service for the specified period of time. Please submit invoices that include the Authorization ID specified above and service dates to the remit address specified below by the 5th day following the month of service. Invoices must be received within thirty (30) days from the date of service in order to guarantee payment.

Service: service category – service type

Unit type: Session
Agreed upon rate per unit: $120.00
Units: 3

Total Amount Authorized: $360.00

Valid from 02/12/2014 to 04/12/2015

Remit to:
CBC Agency Name
CBC Agency Address
CBC Agency City, State, Zip

Please contact First, Last at (850) 555-1111 or through user@email.org for any questions regarding this request.

Thank you

[Signature]
Sample: Payment Activity Page
Topic 2: FSFN System Demo
Complete Service Authorization
Topic 3: View Service Authorization

- View Service Authorizations from the Case Outliner
- View Service Authorizations from the Provider Outliner
- View Service Authorizations from Case Book
- View Service Authorizations from Person Book
View Service Authorization: Case Outliner

- The Case Outliner now provides access to the Service Authorization page.
- The outliner includes a new icon, the Service Category, with Service Sub Category as hyperlink to the Service Authorization page, the Request Date, Participant Name and ID, and Status.
View Service Authorization: Provider Outliner

- The Provider Outliner is modified to provide access to the Service Authorization page.
- The outliner includes a new icon, the Service Category, with Service Sub Category as hyperlink to the Service Authorization page, the Request Date, Participant Name and ID, and Status.
View Service Authorization: Case Book

- The Case Book middle panel is modified to provide access to the Service Authorization page.
- The panel includes a new icon, the Service Category, with Service Sub Category as hyperlink to the Service Authorization page, the Request Date, Participant Name and ID, and Status.
View Service Authorization: Person Book

- The Person Book middle panel is modified to provide access to the Service Authorization page.
- The panel includes a new icon, the Service Category, with Service Sub Category as hyperlink to the Service Authorization page, the Request Date, Participant Name and ID, and Status.
Sample: Case Outliner
Sample: Provider Outliner

Providers
- JACKSON, LISA L (186365) Actions
  - Active
  - Person Provider
  - Foster Care
  - Duval
  - QLMVH, MELODY B
  - Assignments
  - Basic
  - Invoice
  - Licenses
  - Linked Providers
  - Members
  - Parent Agency
  - Payment Requests-System Disbursed
  - Placements
  - Prior History
  - Service Authorization
    - None
    - 2014-02-17 Snapper, Sally 200000496 Denied
  - Services
  - Unified Home Study
Sample: Case Book
Sample: Person Book
Topic 4: Service Sub Categories and Service Types

- Service Categories used in the Case Plan Worksheet are merged with the Service Category associated with Financial Management functions.
- Service Categories include additional values for use in case planning and creating payments for services authorized using Service Authorization functionality.
- Service Sub Categories used in the Case Plan Worksheet and Service Authorization pages are maintained at the state level on the Service Category Options page.
- “Financial” Service Types using Service Categories designated as “Service-only” must be a “Service” and not a “Placement”.

Service Sub Categories and Service Types: Service Category Options Page

- Service Category Options page allows designated state-level users to maintain Sub Categories for each Service Category.
- Service Category Options is accessed from the Financial Work page, Utilities drop down.
- Click the “Inactive” column hyperlink to refresh values.
- Service Category drop down filters the Service Sub Categories for that value.
- Service Sub Categories can be inserted, inactivated or activated, or their description updated.
- Export generates a .csv file compatible with MS Excel with the information on the page.
- Users with view access to the Maintain Service Type page have view access to the Service Category Options page.
Service Sub Categories and Service Types: Service Type and Rate Page

- The Service Categories on the Service Category Options page are the values used on the Maintain Service Type page to set up CBC specific Service Types.
- Service Types using Service Categories designated as “Service-only” must be a “Service” and not a “Placement”.
Sample: Service Category Options Page

Florida Safe Families Network

<table>
<thead>
<tr>
<th>Service Category</th>
<th>Service Sub Category Description</th>
<th>Code</th>
<th>Inactive</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adoption</td>
<td>Adoption - Finalization Costs</td>
<td>168</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Adoption - Medical Costs</td>
<td>169</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Adoption Incentive Services</td>
<td>170</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Adoption Incentive Subsidy</td>
<td>171</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Adoption Subsidy</td>
<td>172</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Child Study</td>
<td>341</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Counseling</td>
<td>342</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Dental</td>
<td>343</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Finalization Fees</td>
<td>344</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Home Study</td>
<td>345</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Medical</td>
<td>346</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Medication/Prescription</td>
<td>347</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Other</td>
<td>348</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Other Assessment or Evaluation</td>
<td>349</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption</td>
<td>Pre-Adoption Home Preparation Costs</td>
<td>350</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For Training Purposes Only
Sample: Service Type and Rate Page
Topic 5: Business Objects and Check Write File

• New Service Authorization information is available in the Payment Detail Universe for Ad hoc reporting.
• Check Write File populates Provider Invoice Number, Date and Authorization ID.
Sample: Check Write File

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Provider ID</th>
<th>Child DOB</th>
<th>Payment Ledger ID</th>
<th>Provider Invoice/POS #</th>
<th>Provider Invoice/POS Date</th>
<th>Service Auth ID</th>
</tr>
</thead>
</table>
Points to Remember

- Service Authorization page links Case Plan Outcome Tasks with associated Payments and Services through the Payment Activity page.
- Wider array of services tracked within FSFN.
- Provides the data that supports more accurate cost of care reporting.
Reference Information

The following reference documents are available for download from the FSFN home page of the Center for Child Welfare Web site:

- Service Authorization User Guide
- Service Authorization How Do I? Guide
- Service Authorization Topic Paper
Please go to ...

www.centerforchildwelfare.org