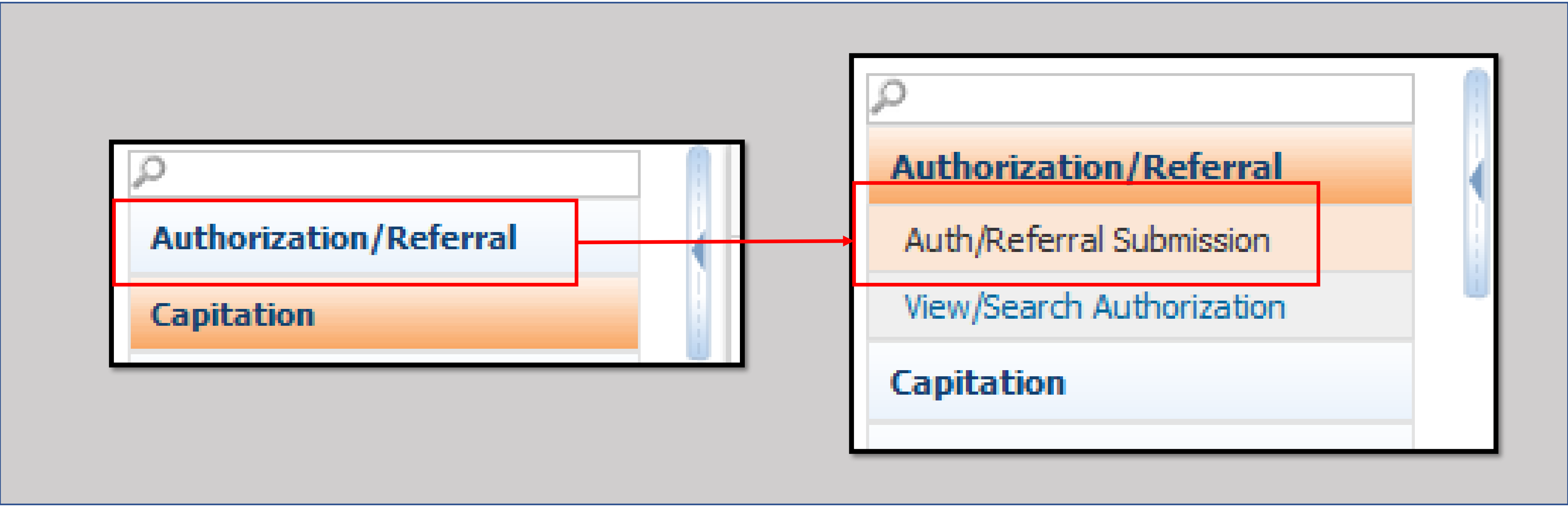
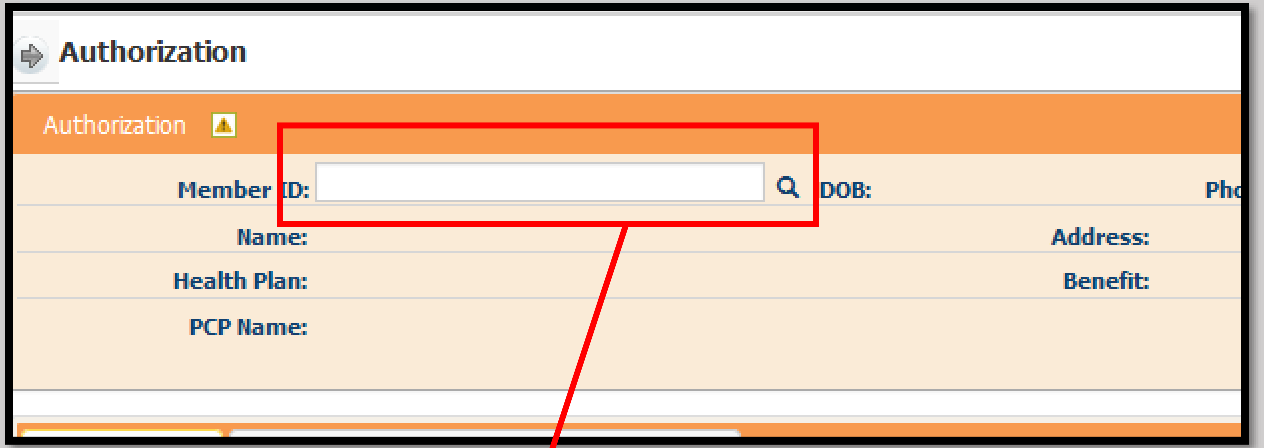
Innovative Management Systems

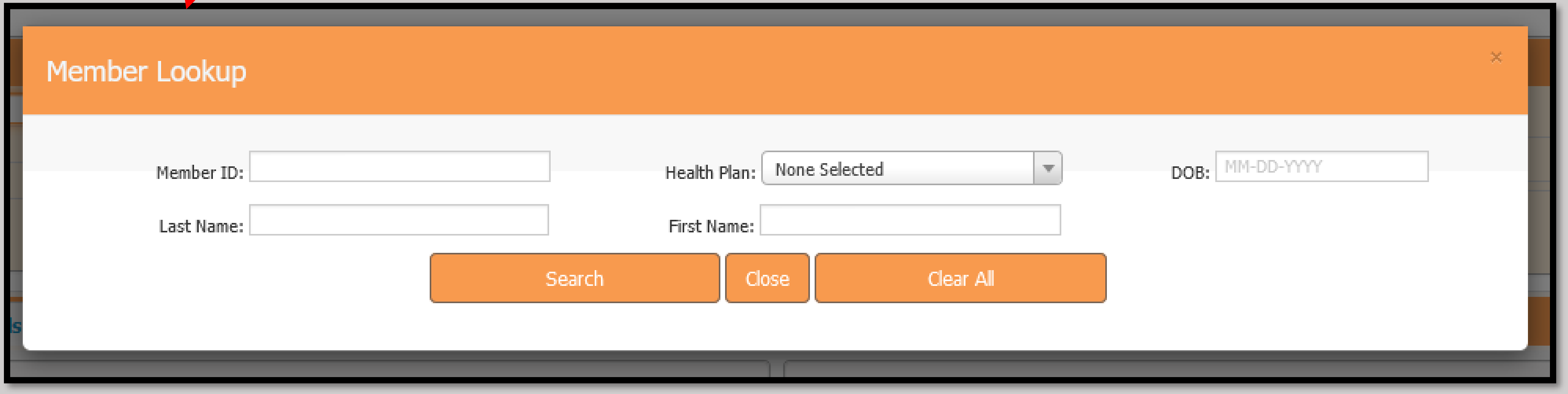
Provider Tutorial
Authorization Submission and Search

Authorization and Referral Submission:

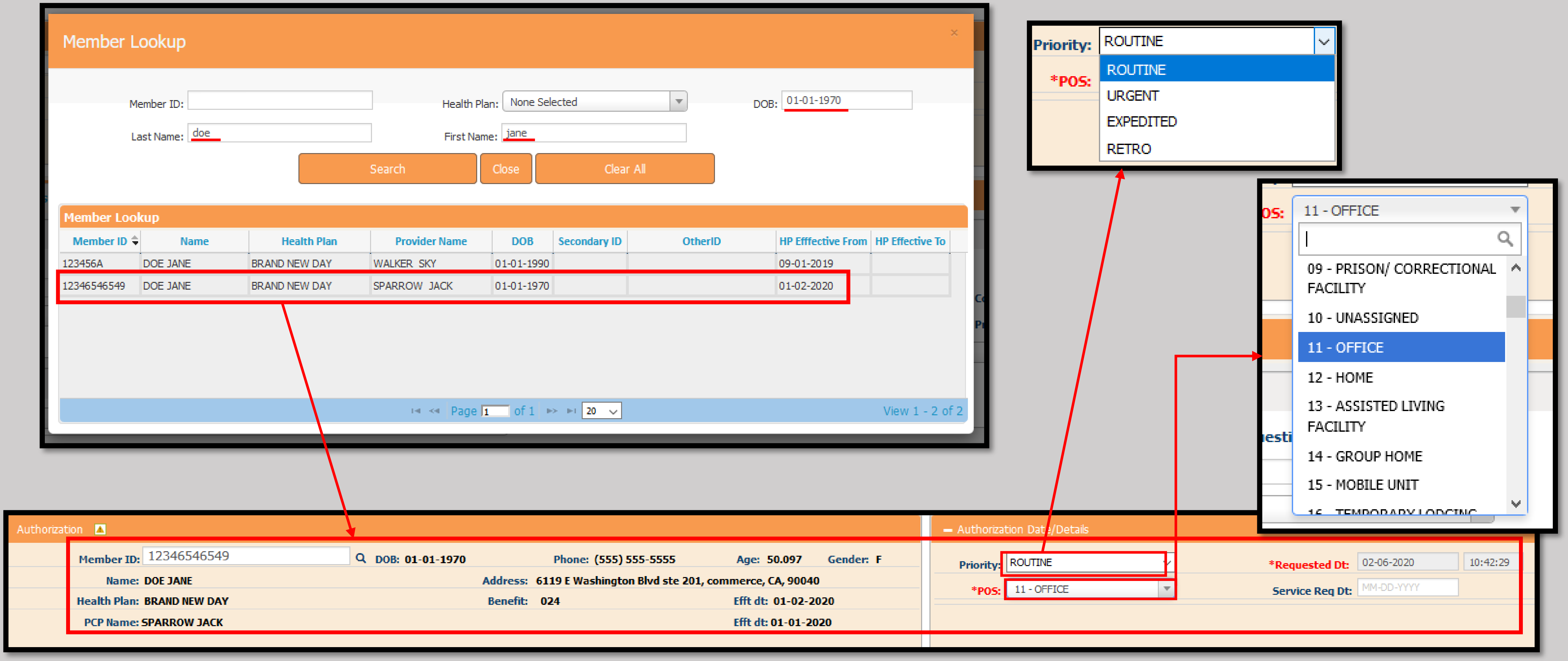


- From the List of Modules on the Left side of the screen, click the “Authorization/Referral Module button. The menu will expand.
- Then click on “Auth/Referral Submission.”

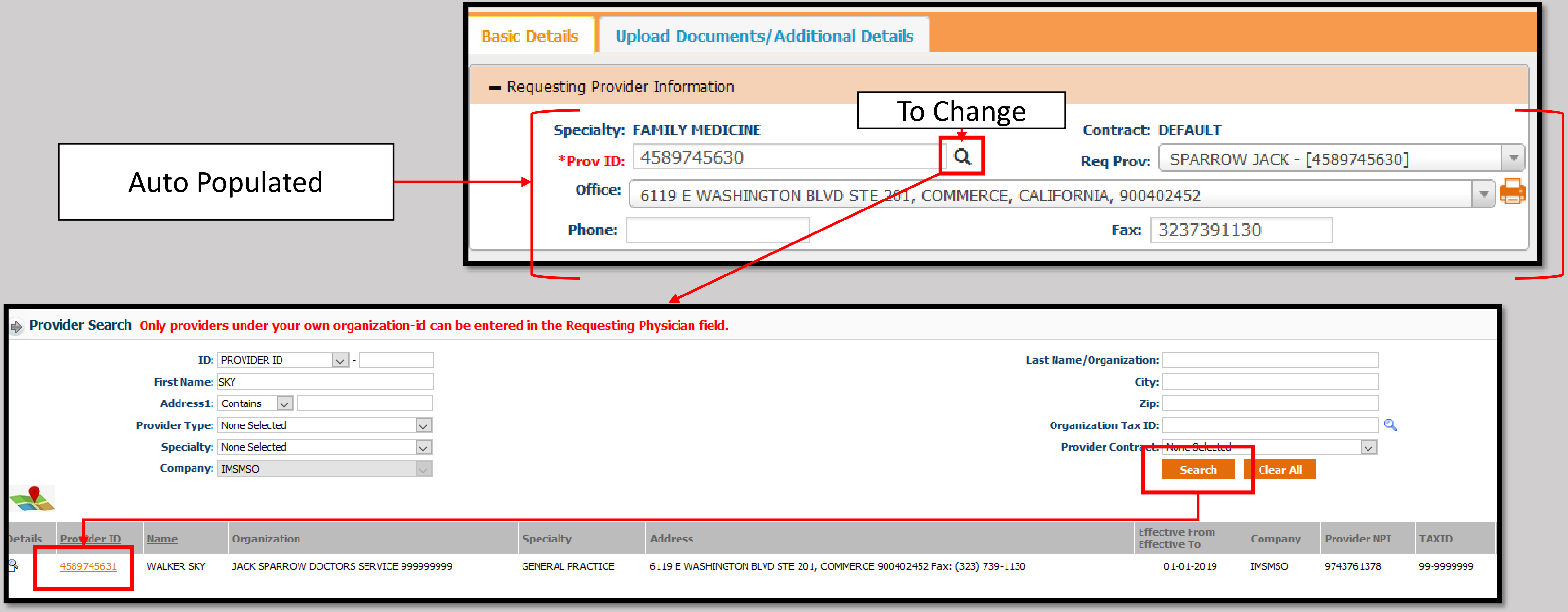




- Type the Member's ID in the box shown above.
- If you need to search for the Member, click the Magnifying Glass and enter as much as possible related to them.

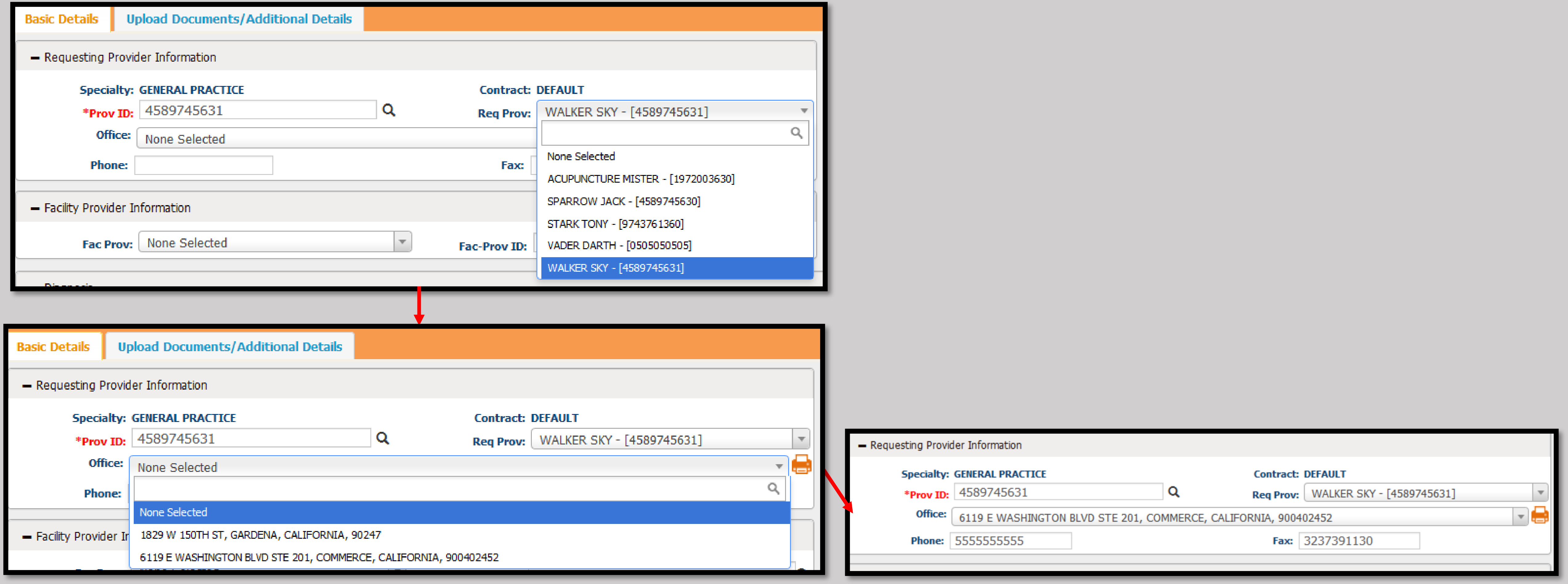


- After clicking the “Search” Button, select the appropriate member by double clicking the entry.
- On the right side of the screen, select the “Priority,” and “Place of Service” (POS) using the corresponding drop-down menus, and if known, the “Service Req Date” (Date requested).

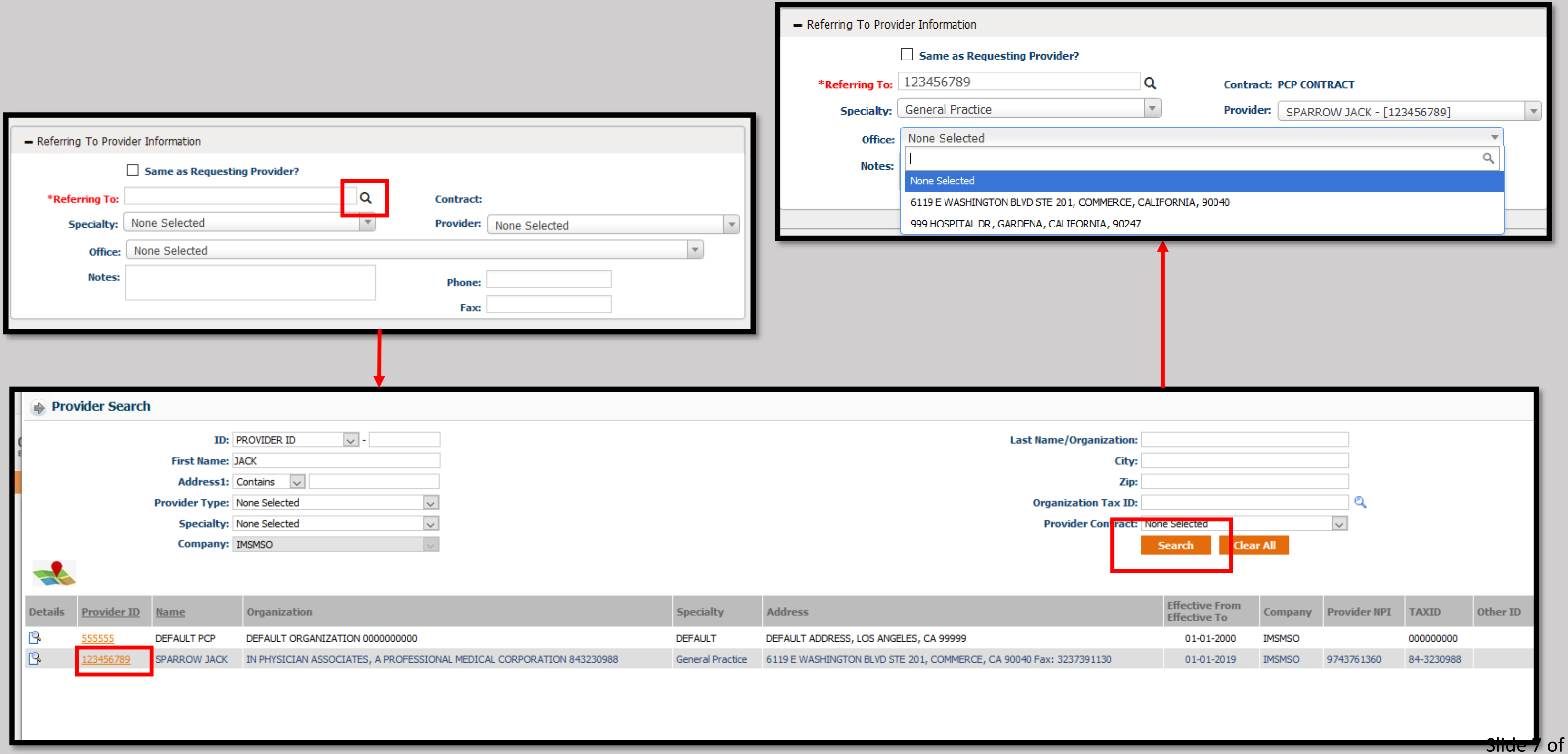


- Note the “Requesting Provider Information” will auto-populate with information.
- In the event the requesting person works for an office or organization with multiple providers, use the “Prov ID” button to search for the correct Provider.
- Enter as much of the Requesting Provider as possible, click Search and click on the Correct Provider ID.

- If there are multiple providers in an office, use the “Req Prov” drop down to see all that are associated.
- Select the correct Requesting Provider.
- If there are multiple Office Locations use the drop down and select the appropriate location.

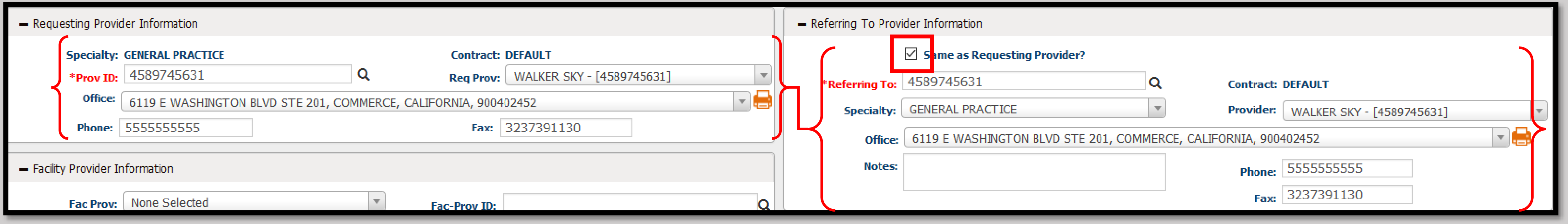


- Using the Search function enter as much as possible to locate the Correct Referring To Provider.
- If there are multiple Office Locations use the drop down and select the appropriate location.

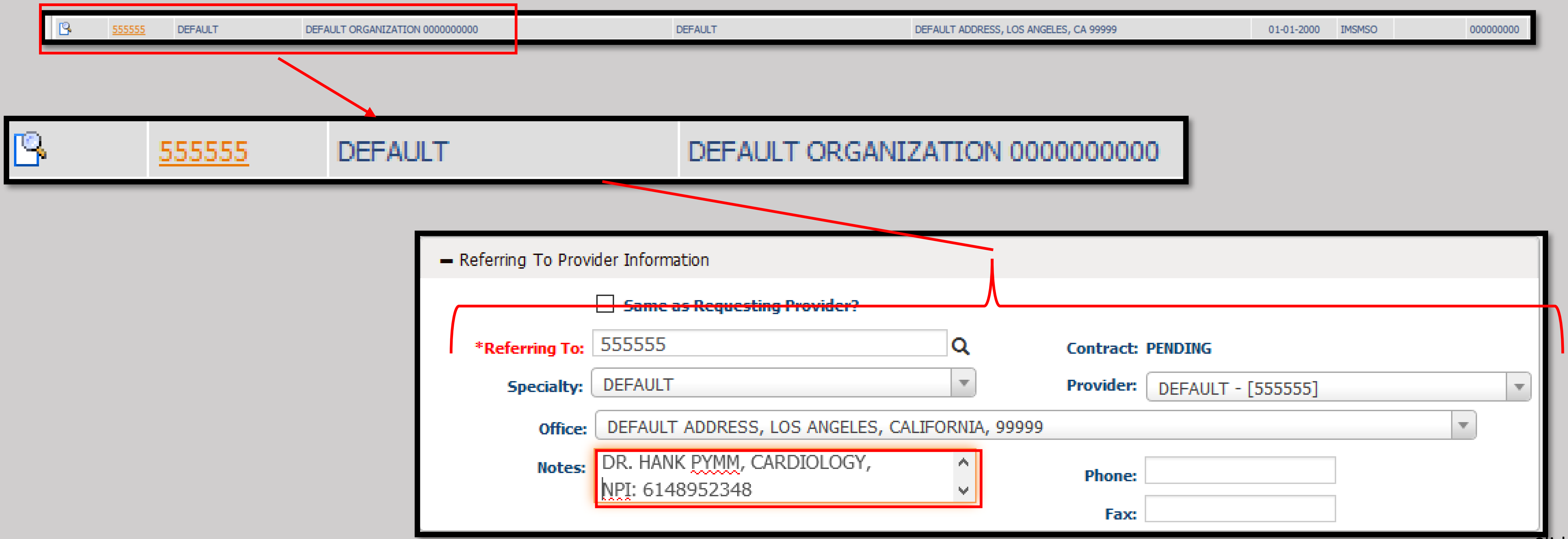


➢ If the Provider is referring to themselves, simply check the box labeled "Same as Requesting Provider?"

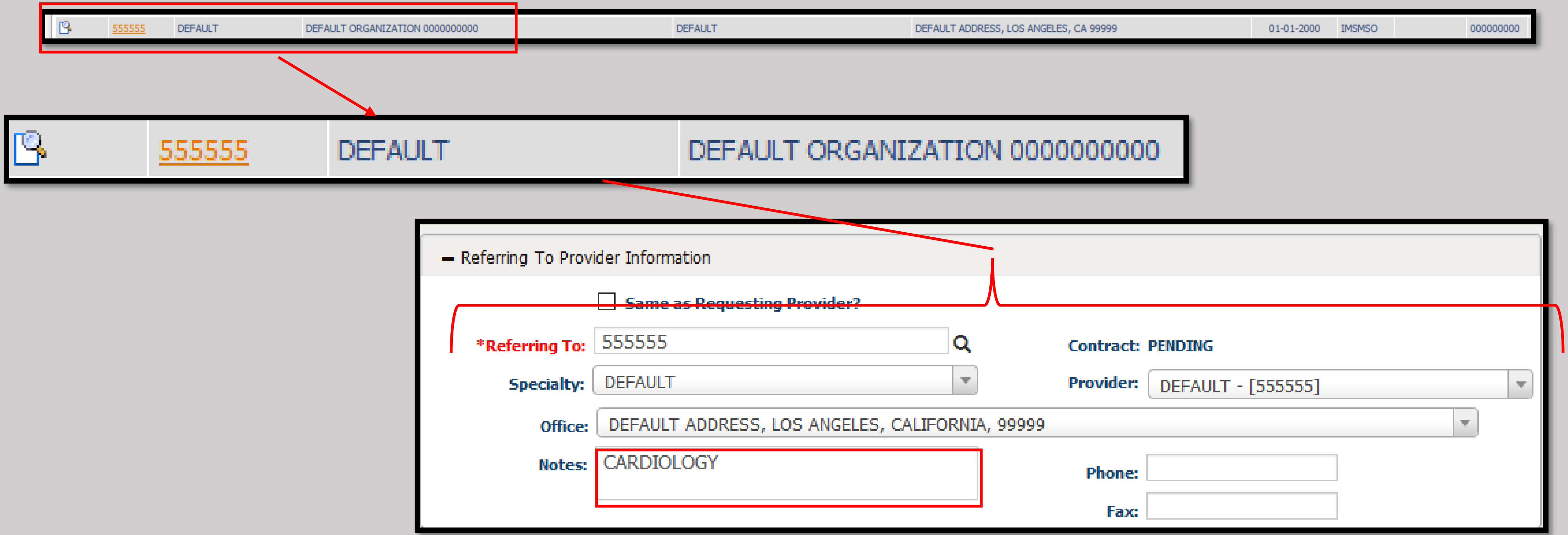
- The fields will auto-populate with the information.



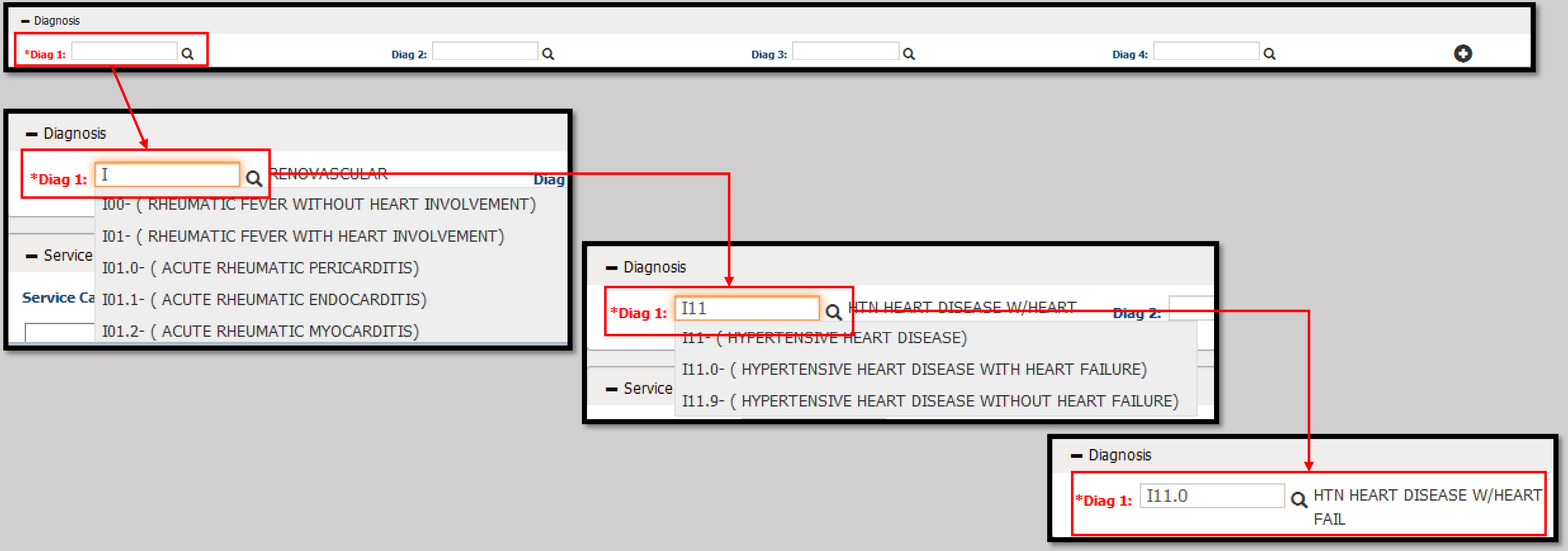
- If the required specialist or specialty is not in the system, select the provider named “DEFAULT” and enter the details for the provider in the Notes section.
- Include the First and Last Names, the NPI, Specialty, Phone, and FAX number for the provider.



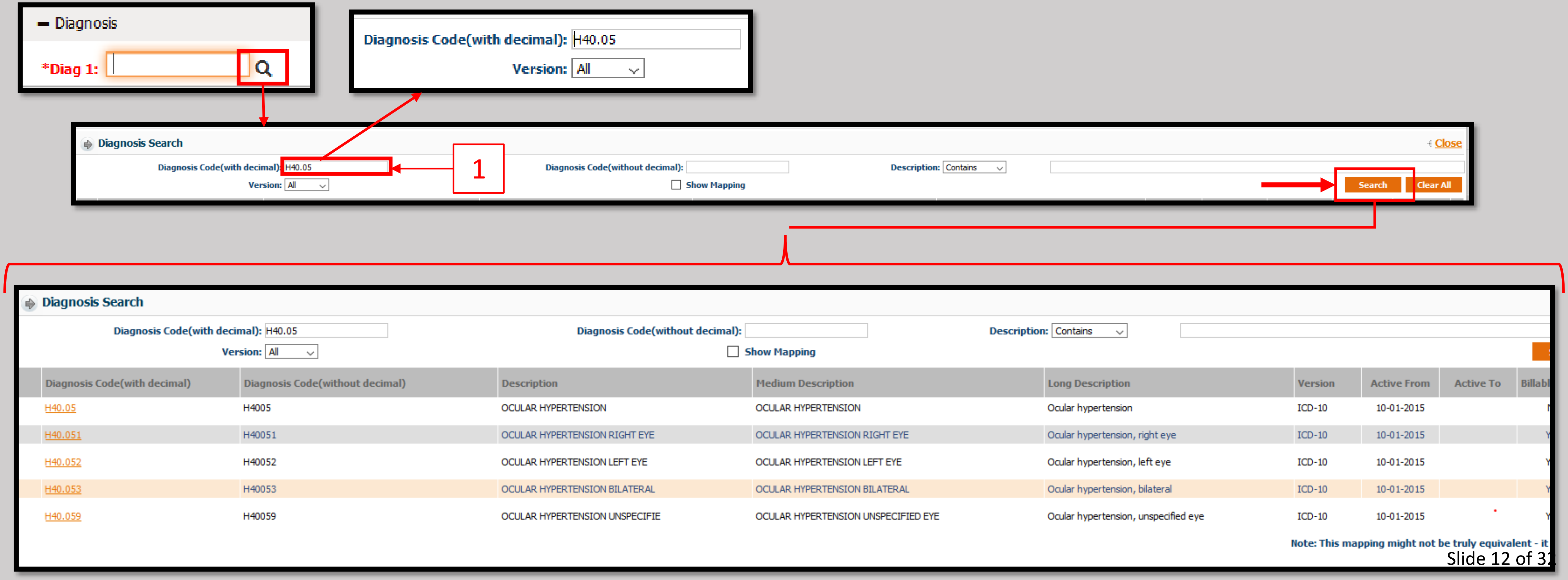
- If there is a Specialty that is required but there is no specific provider to refer to, select the provider named “DEFAULT”.
- Include the specialty required to fulfill the referral.



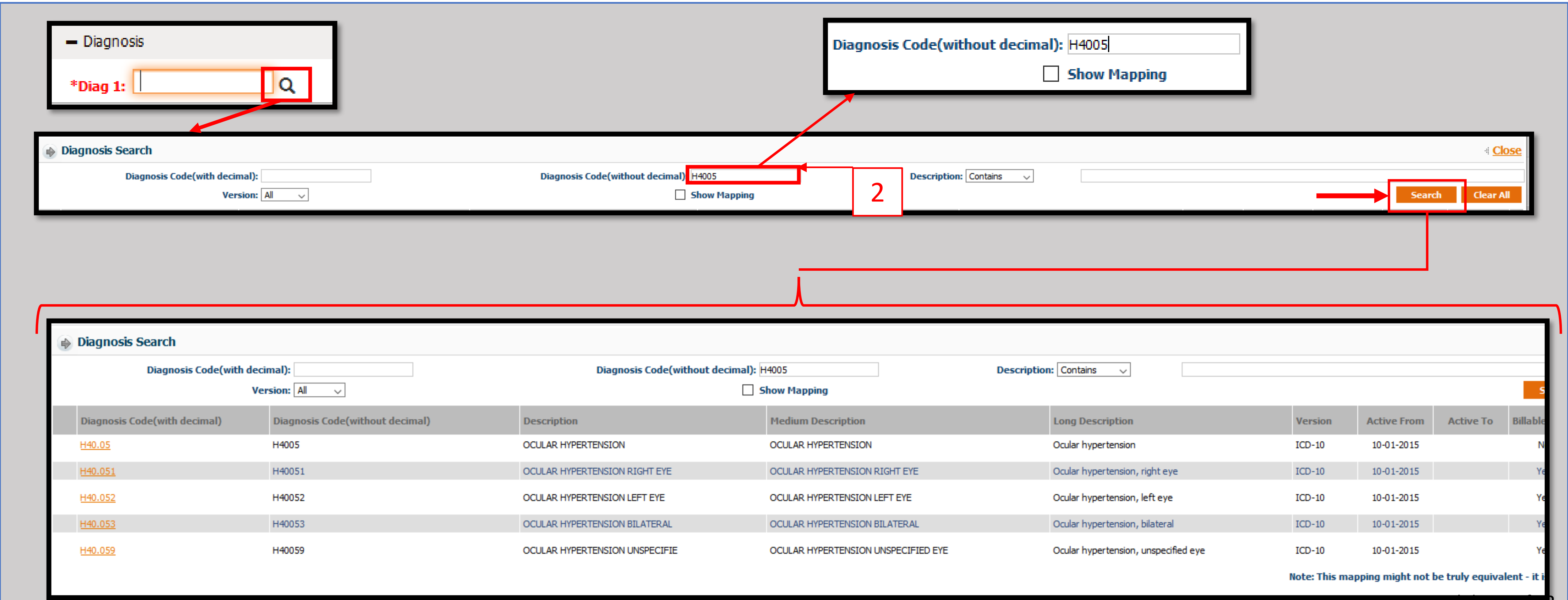
- To select the Diagnosis Code, click the “Diag 1” box and begin to type the code.
  - As you type, the selection will change to match what is entered.
  - Please note at least one Diagnosis Code is required.
- Once the Diagnosis is selected, the description will appear to the right of the dialog box.



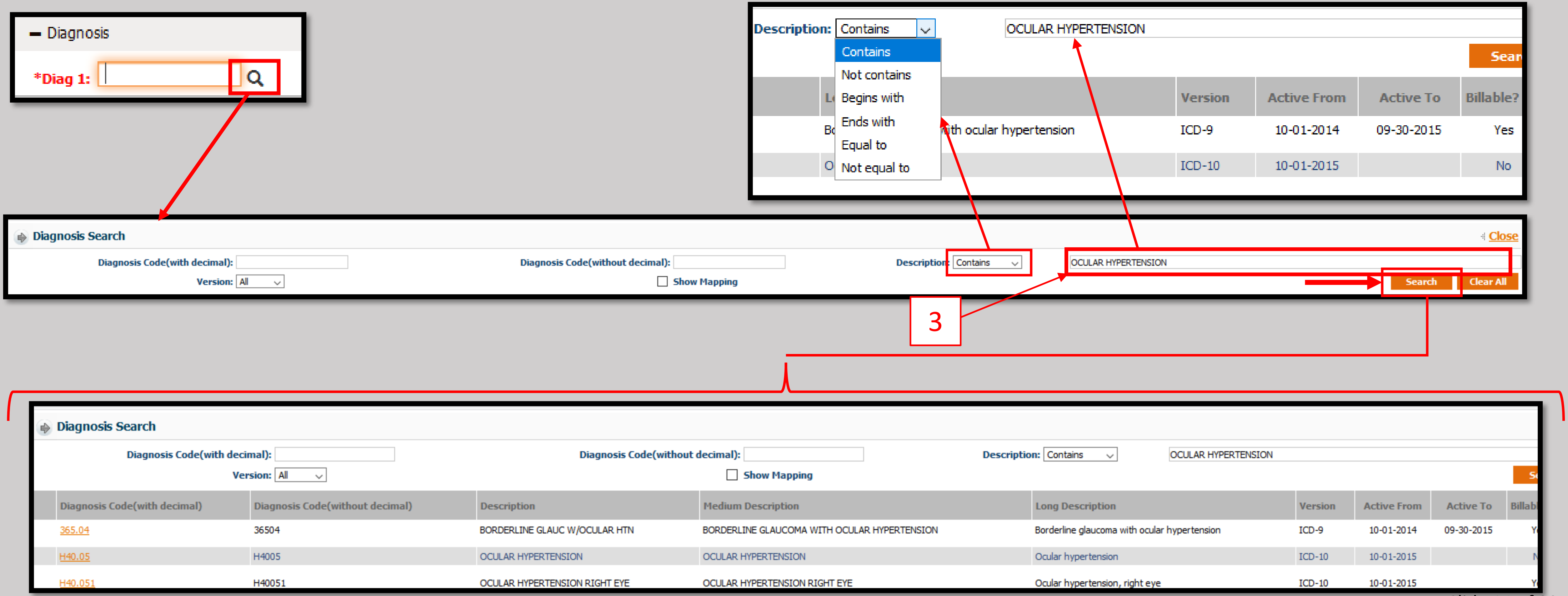
- Alternatively, if more information is required to select the appropriate code click the magnifying glass to the right of “Diag 1.”
- A new window will open with three options.
- (1) If you know part of the numeric code, you may enter it with the decimal and click the search button.



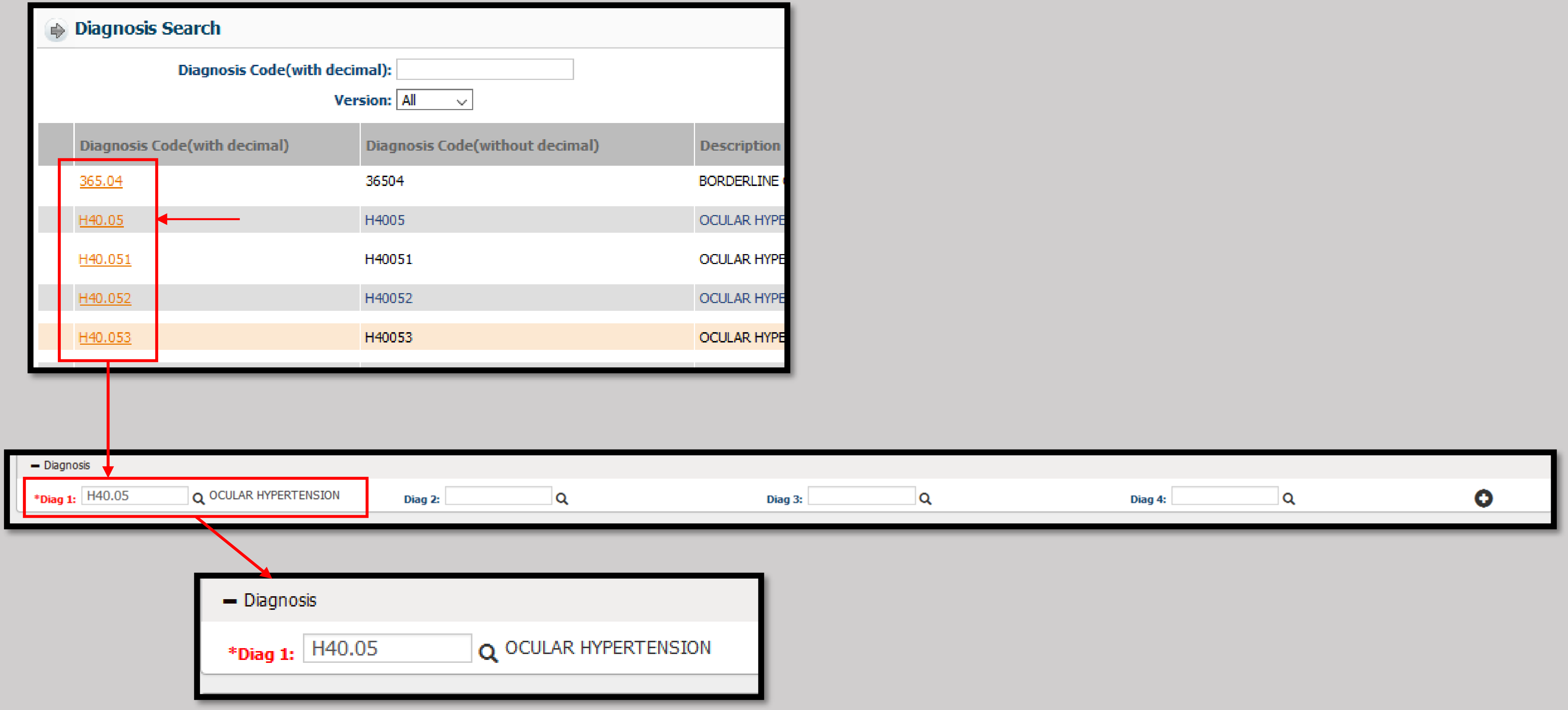
➢(2) You may also enter the Diagnosis Code without the decimal and click the search button.



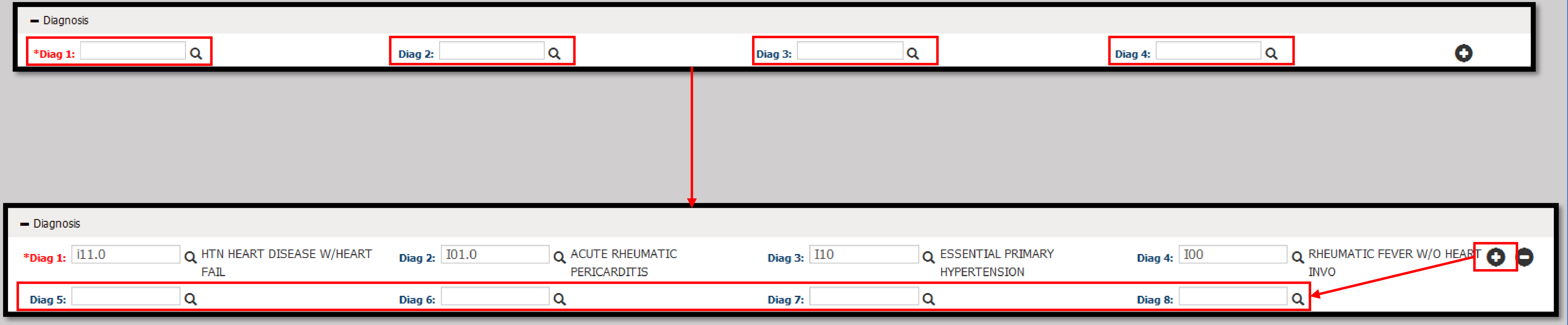
- (3) If you do not know the code, use the “Description” box.
- Using the drop-down, select the descriptor that goes with the terms used.
- Enter the description and click the Search button.

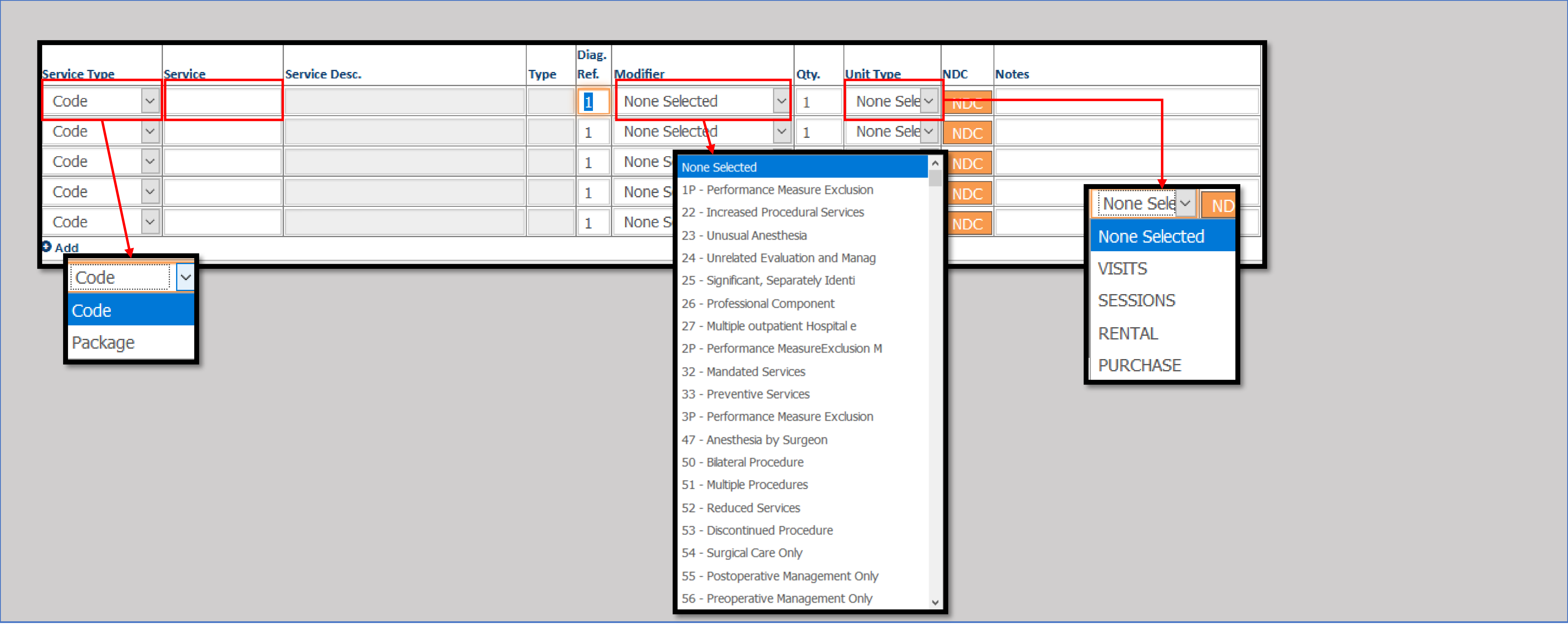


- When using one of these three methods, once the appropriate code is found select it by clicking on the Yellow, underlined text in the "Diagnosis Code (with decimal) column.



- Repeat the process for Diagnosis Codes two thru four.
- If additional codes are required, click the Plus button on the right of the Diagnosis area to create the next row.
- Repeat this process until all applicable diagnosis codes have been entered.



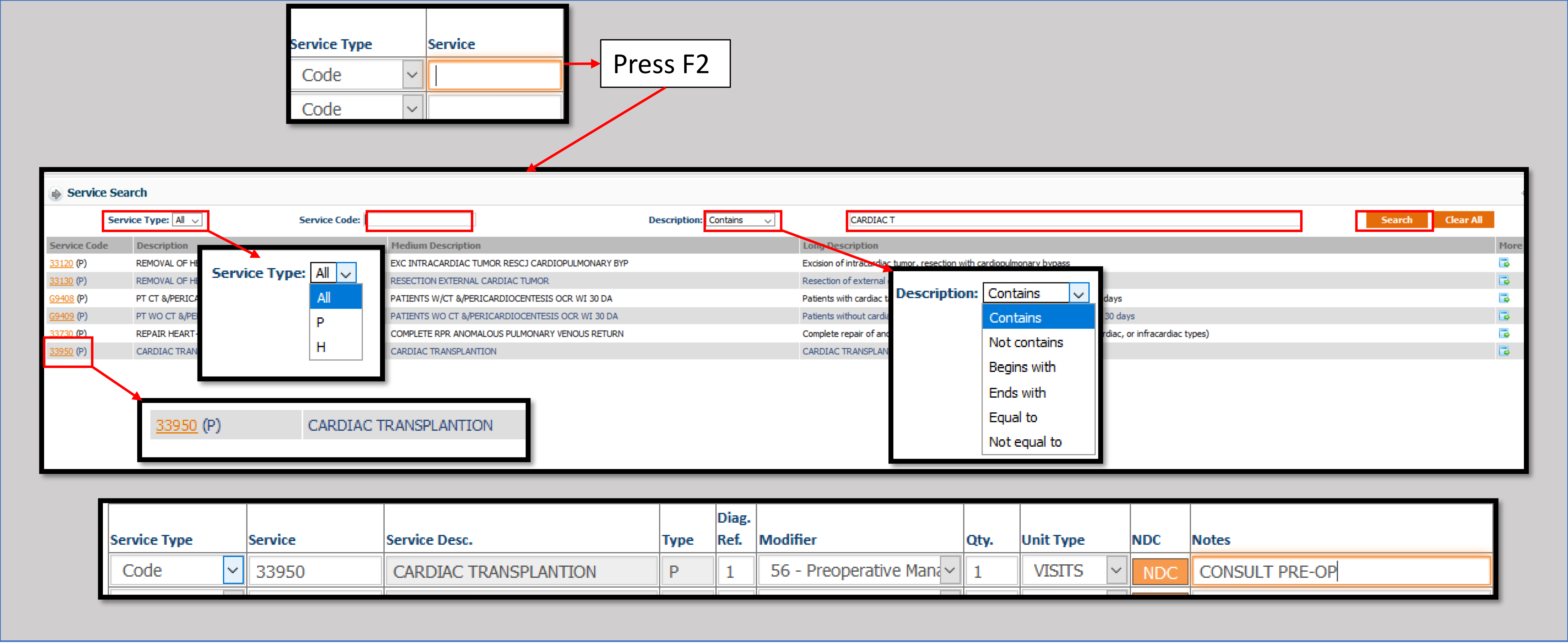


- For the Services, take note of the drop-down menus for the “Service Type,” “Modifier,” and “Unit Type.” (More information on the service on the next page)
  - There is a dialog box for the corresponding Diagnosis, “Diag. Ref.” as well as a quantity for that service.

Service Type	Service	Service Desc.	Type	Diag. Ref.	Modifier	Qty.	Unit Type	NDC	Notes
Code	33950	CARDIAC TRANSPLANTION	P	1	None Selected	1	None Sele	NDC	
Code				1	None Selected	1	None Sele	NDC	
Code				1	None Selected	1	None Sele	NDC	
Code				1	None Selected	1	None Sele	NDC	
Code				1	None Selected	1	None Sele	NDC	

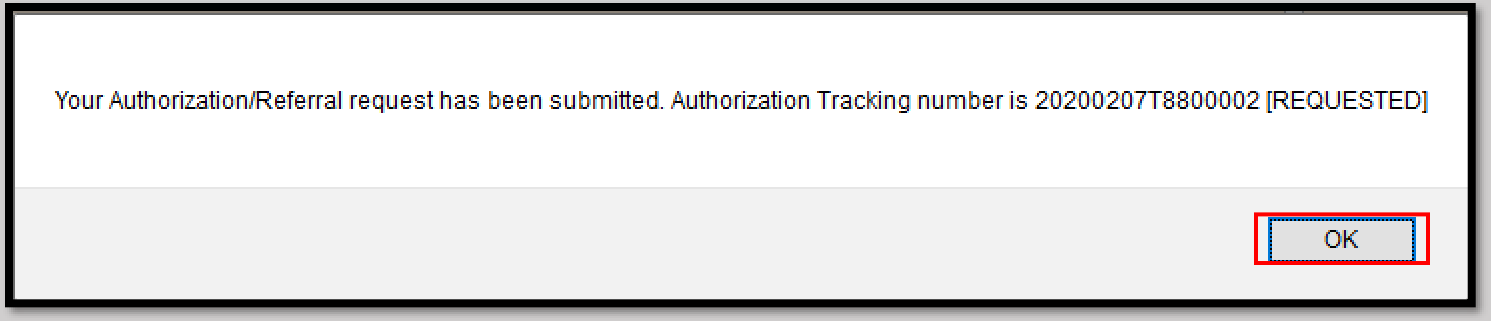
Add

- The service code can be directly entered in the Service field. Press enter when finished.
  - The “Service Desc.” (Description) will fill in if the code is found.

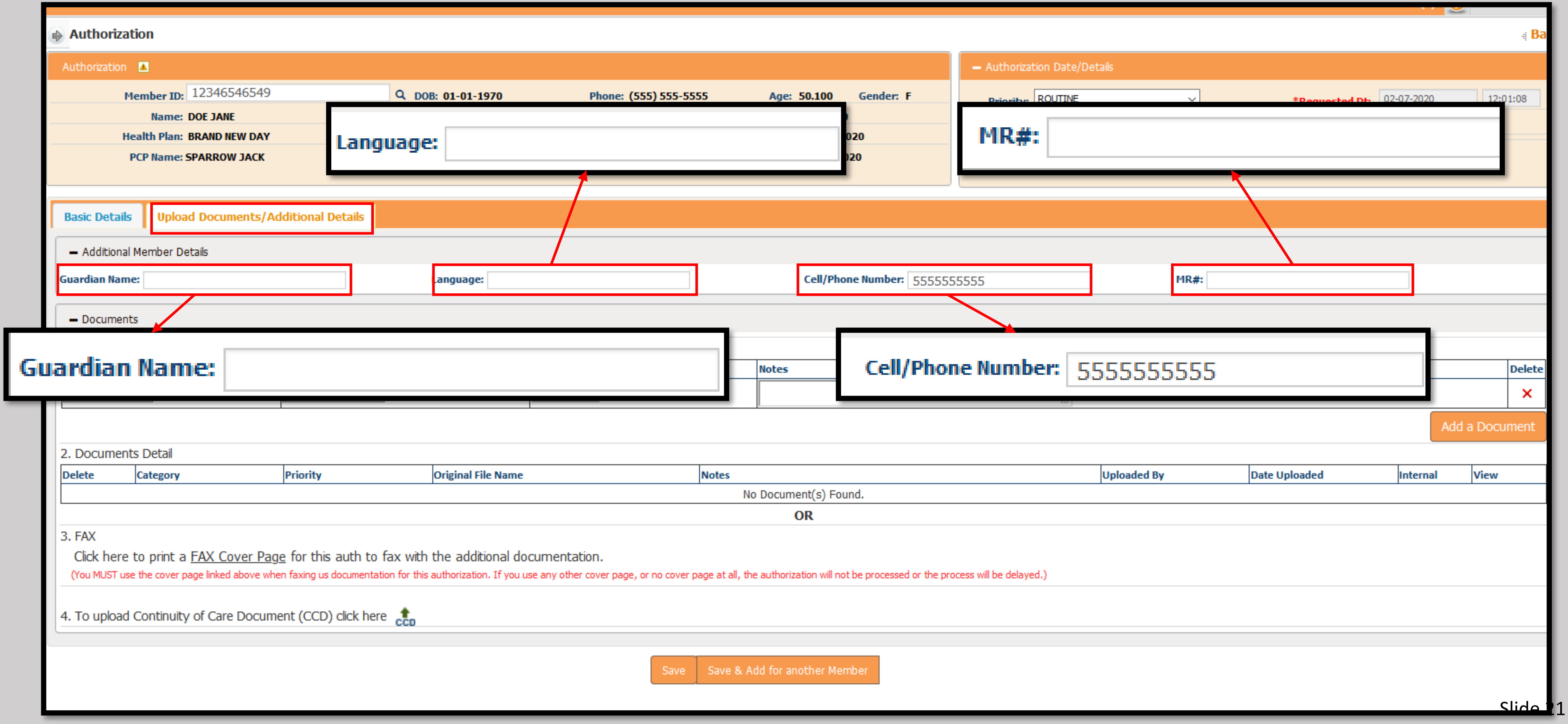


- If a search is required, click in the Service field and press the F2 button to open the Search dialog box.
- The Service Type selects "Professional" or "Institution" Code types.
- The Description drop-down is identical to the previous example.
- Enter any portion of the Service Code in to the "Service Code" box.
- Alternatively, enter the "Description" box and press the Search button.
- Select the appropriate Service Code in the yellow text in the Service Code column.
- Repeat these steps until all Services have been entered.

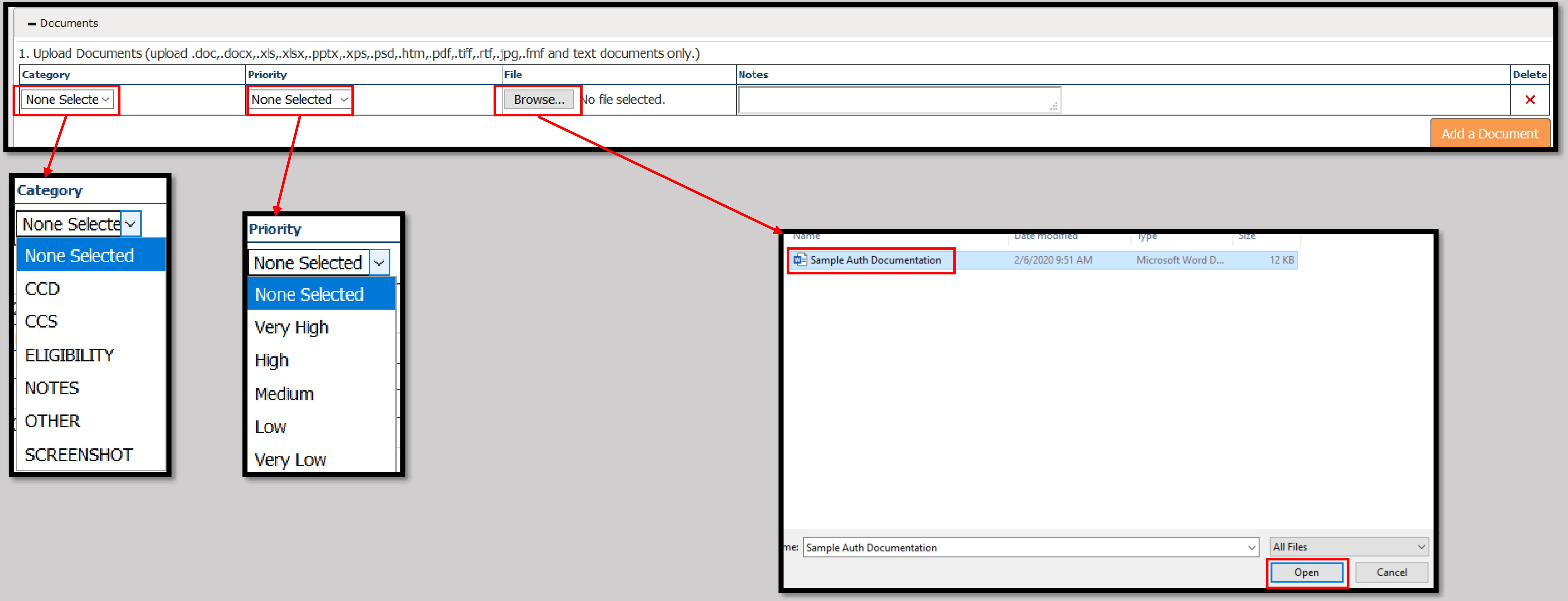
- Once all information has been entered, select “Save” to complete the Authorization process.
- If there is another Authorization that needs to be created, press the “Save & Add for another Member” button to begin the next authorization.
- Both buttons are found at the bottom of the authorization screen.
- A Dialog box will appear confirming the Authorization request has been submitted.
- Click “OK” to continue.



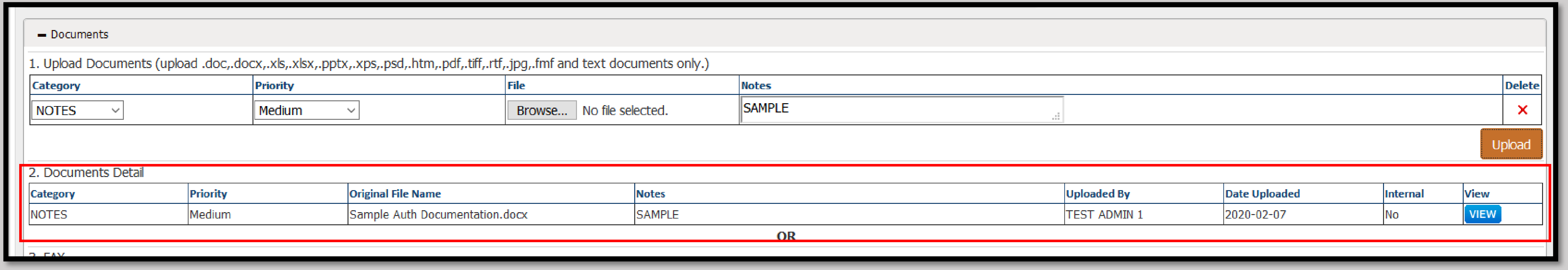
- In the even that additional information or documentation is required, click on the Tab “Upload Documents/Additional Details.”



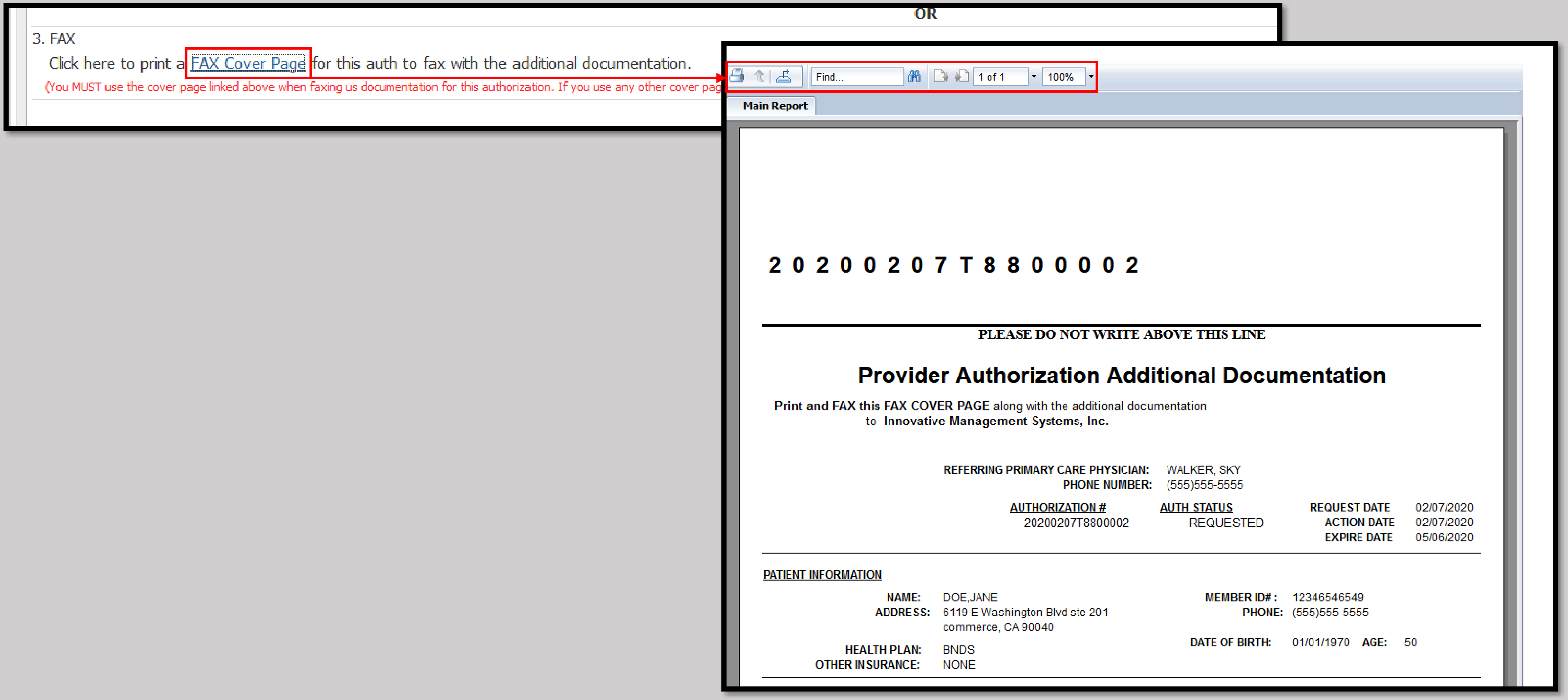
- Using the Documents section, notes and documents can be attached using "1. Upload Documents."
  - ➢ Select the proper Category and Priority from the drop-down menus.
  - ➢ Click the "Browse" button and locate the file on the computer. Select "Open" when finished.



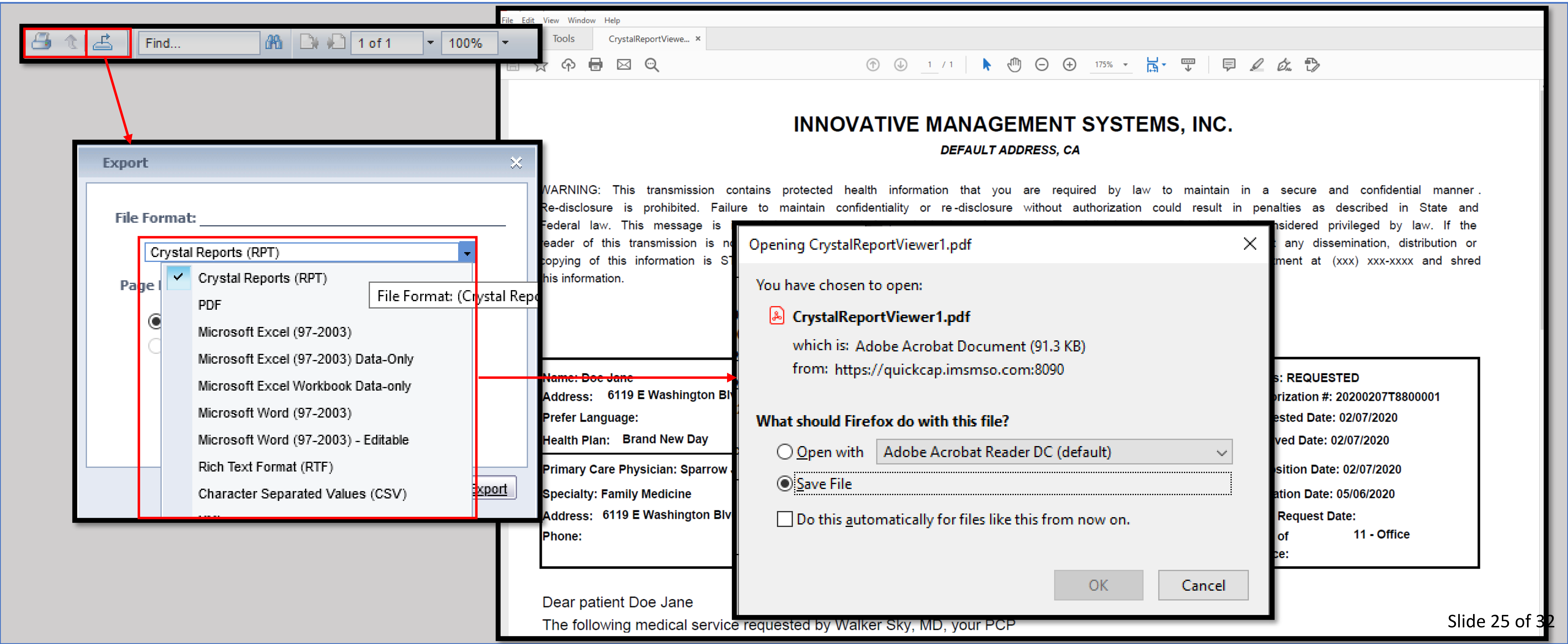
- Repeat the previous step for any additional documentation.
- All attached documents will be shown in a list form under the heading "2. Documents Detail."



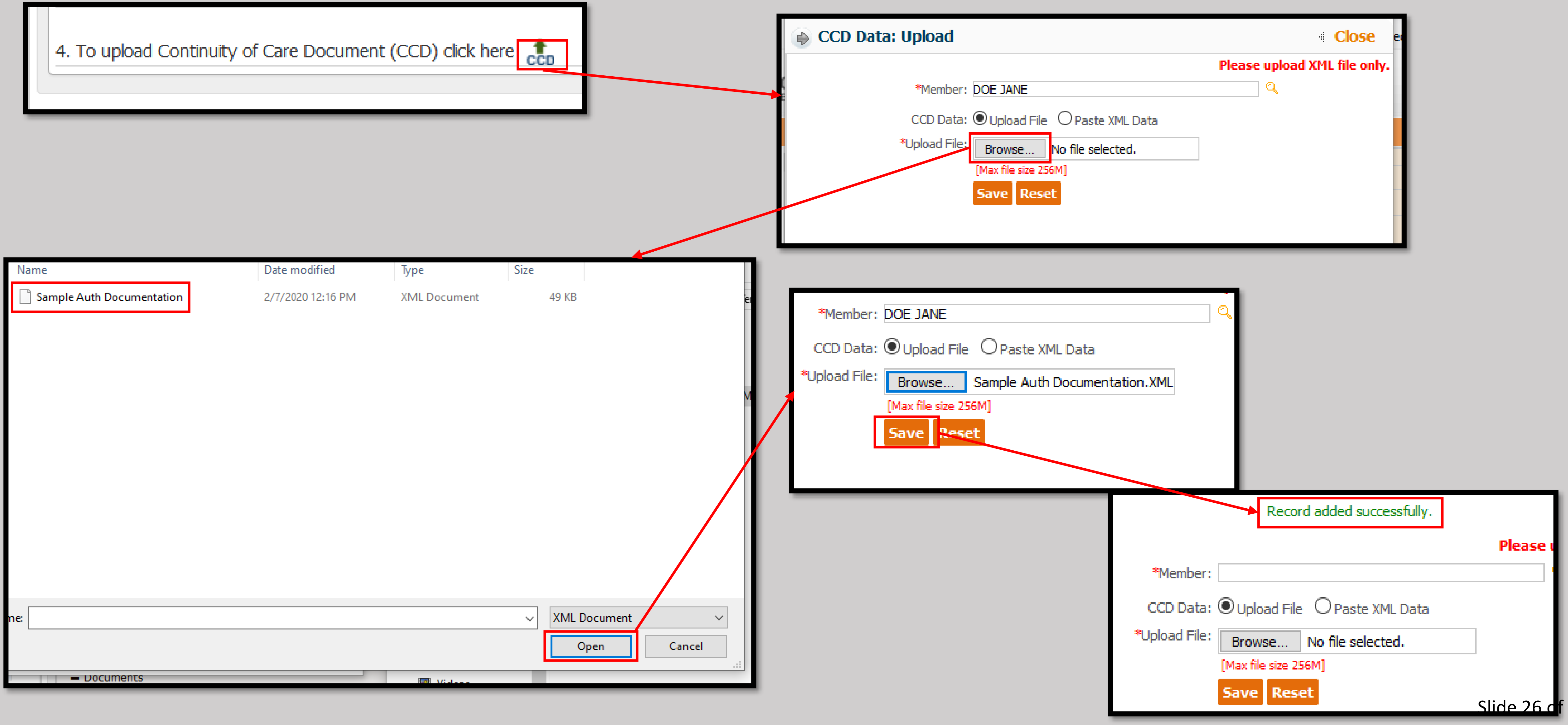
- Alternately, a FAX Cover Sheet can be produced to submit the documentation via FAX using "3. FAX."
- After clicking on the "FAX Cover Page" button, a window will open with options to print and save the cover letter, using information from the data you previously entered.



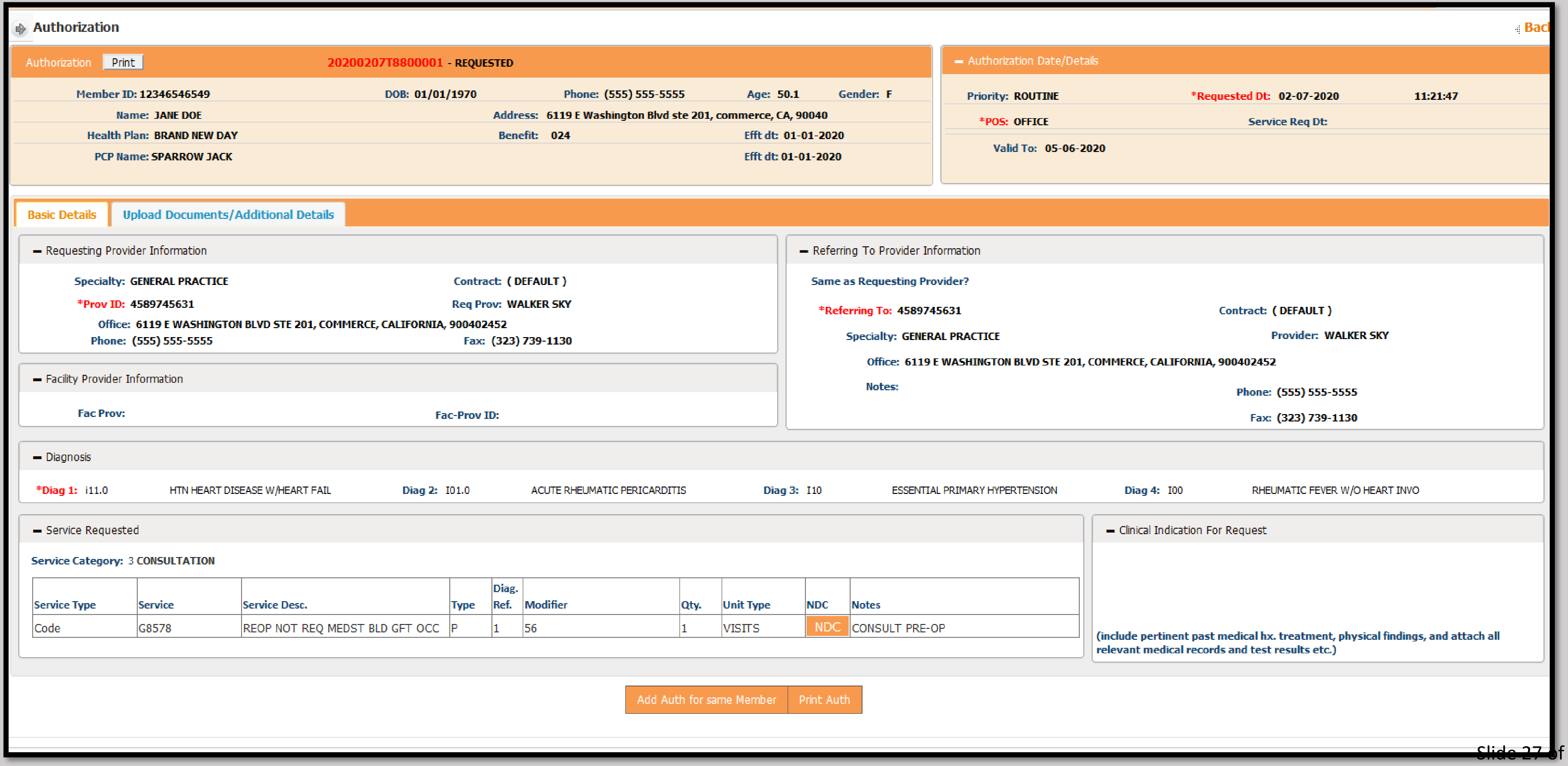
- The Top Left Button allows for file printing.
- The next button to the Right allows for a file format to be selected and saved.



- Lastly, documentation can be attached for Continuity of Care using “4. Continuity of Care Document” (CCD)
- Click on the CCD icon and the “Browse” button.
- Locate the documents on the computer and click the “Open” button.
- Click the Save button and you will receive a notice that the “Record added successfully



Shown is the completed authorization request screen.



Authorization

Authorization | Print | 20200207T8800001 - REQUESTED

Member ID: 12346546549 DOB: 01/01/1970 Phone: (555) 555-5555 Age: 50.1 Gender: F

Name: JANE DOE Address: 6119 E Washington Blvd ste 201, commerce, CA, 90040

Health Plan: BRAND NEW DAY Benefit: 024 Efft dt: 01-01-2020

PCP Name: SPARROW JACK Efft dt: 01-01-2020

Authorization Date/Details

Priority: ROUTINE *Requested Dt: 02-07-2020 11:21:47

*POS: OFFICE Service Req Dt:

Valid To: 05-06-2020

Basic Details | Upload Documents/Additional Details

Requesting Provider Information

Specialty: GENERAL PRACTICE Contract: (DEFAULT)

*Prov ID: 4589745631 Req Prov: WALKER SKY

Office: 6119 E WASHINGTON BLVD STE 201, COMMERCE, CALIFORNIA, 900402452

Phone: (555) 555-5555 Fax: (323) 739-1130

Facility Provider Information

Fac Prov: Fac-Prov ID:

Referring To Provider Information

Same as Requesting Provider?

*Referring To: 4589745631 Contract: (DEFAULT)

Specialty: GENERAL PRACTICE Provider: WALKER SKY

Office: 6119 E WASHINGTON BLVD STE 201, COMMERCE, CALIFORNIA, 900402452

Notes: Phone: (555) 555-5555

Fax: (323) 739-1130

Diagnosis

*Diag 1: i11.0 HTN HEART DISEASE W/HEART FAIL Diag 2: I01.0 ACUTE RHEUMATIC PERICARDITIS Diag 3: I10 ESSENTIAL PRIMARY HYPERTENSION Diag 4: I00 RHEUMATIC FEVER W/O HEART INVO

Service Requested

Service Category: 3 CONSULTATION

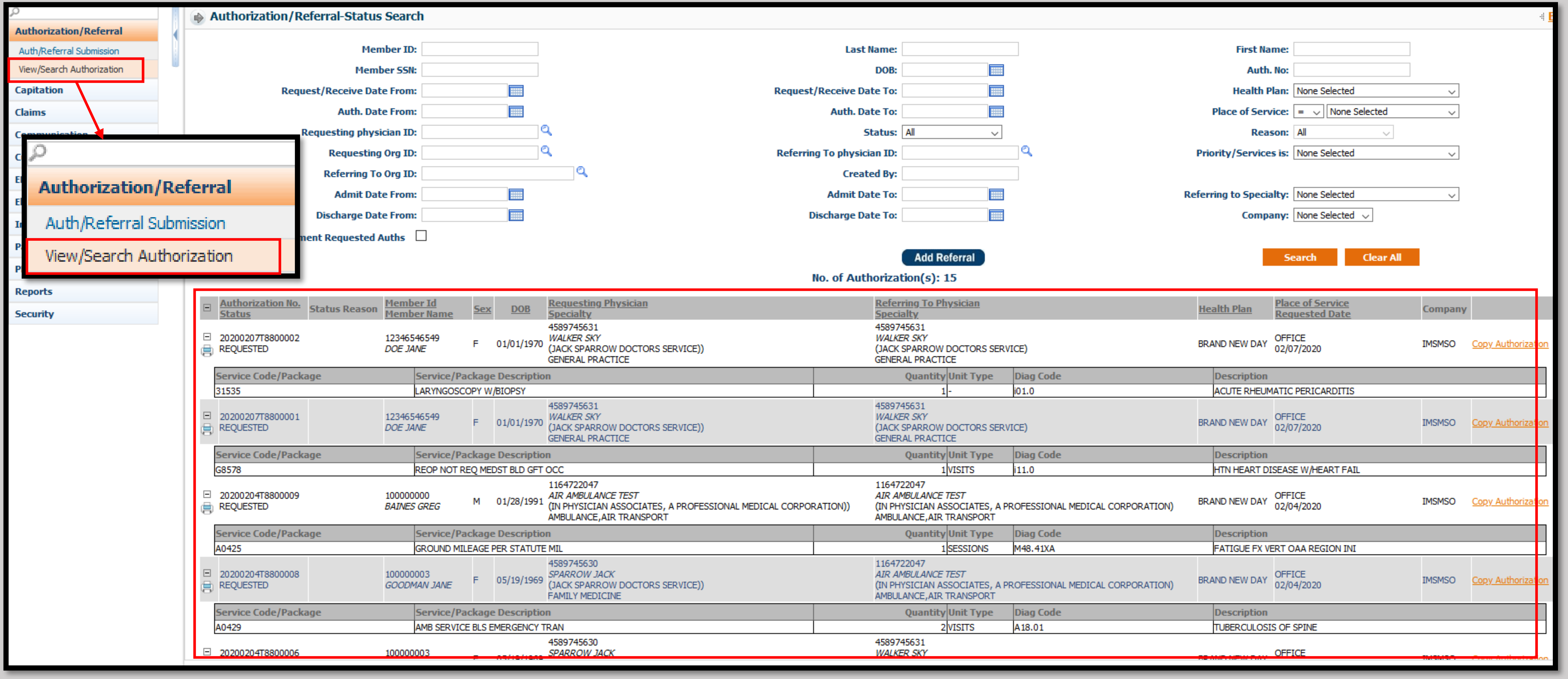
Service Type	Service	Service Desc.	Type	Diag. Ref.	Modifier	Qty.	Unit Type	NDC	Notes
Code	G8578	REOP NOT REQ MEDST BLD GFT OCC	P	1	56	1	VISITS	NDC	CONSULT PRE-OP

Clinical Indication For Request

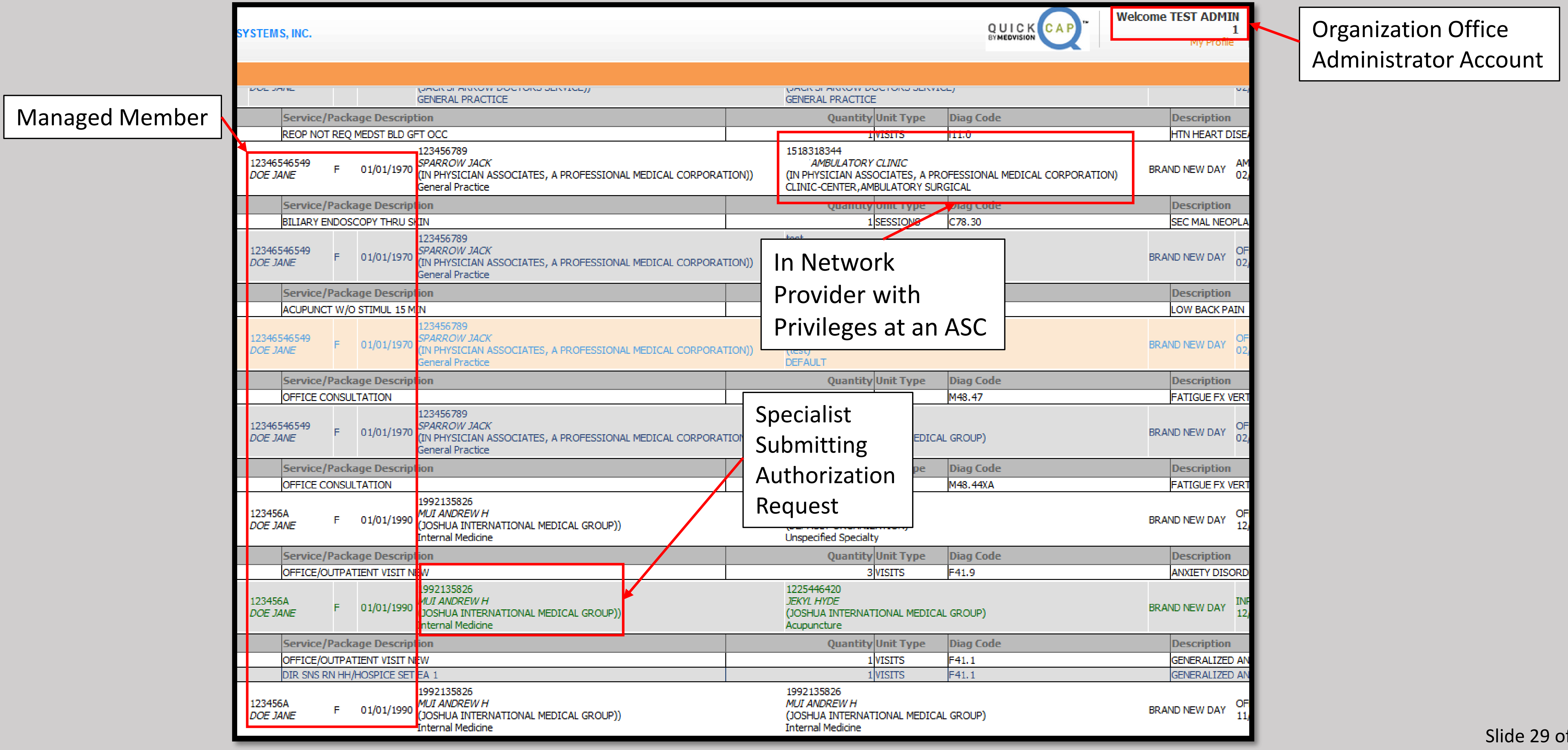
(include pertinent past medical hx. treatment, physical findings, and attach all relevant medical records and test results etc.)

Add Auth for same Member | Print Auth

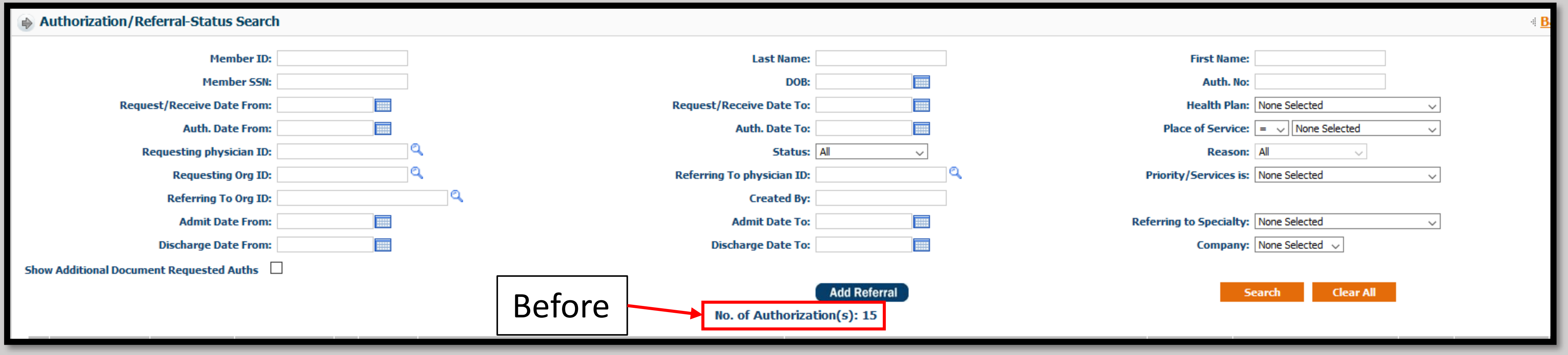
- To see all Authorizations related to an Organization simply select the “View/Search Authorization” Button from the Module list on the Left under Authorization/Referral.

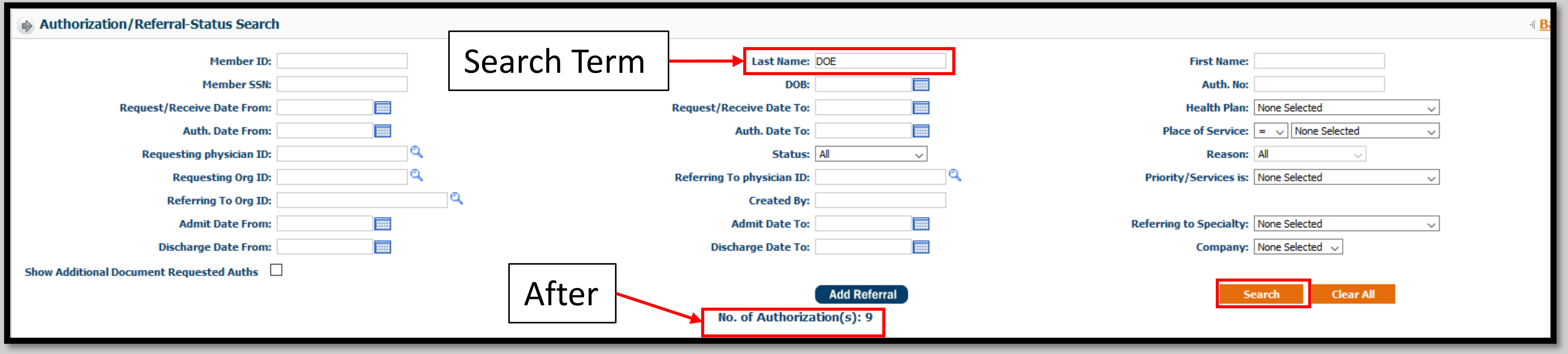


- Note that authorizations for all managed members will appear on the list, even if they originate from a separate Provider.



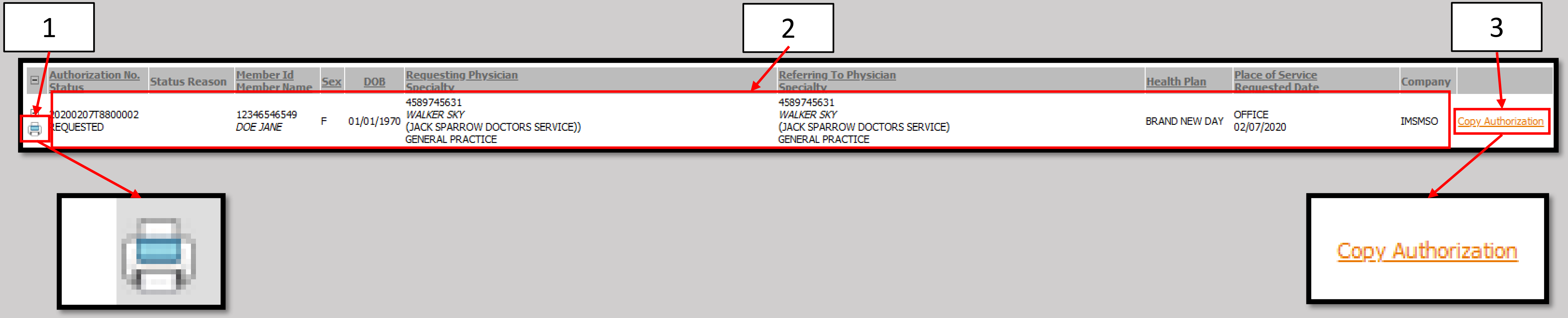
- In order to narrow the results displayed below, use any of the search terms allowed, and click the Search button.





- ➢On each Authorization you will be able to do the following:

1) Click the Print icon to print or save a copy of the authorization.
2) Click the Authorization to see the details.
3) Copy the details of the Authorization to begin a new Authorization entry.



- Once approved, Authorizations go from black to green and the status is updated.
- Click on the approved authorization to see the details.