Prior Authorization System Training Guide

1. Complete CM-01A Intake with client/parent/guardian. If you feel that the client is potentially eligible, go to: http://www.dshs.state.tx.us/caseman/subpaweb.shtml to submit prior authorization (PA) request. This system is compatible with Internet Explorer 8 and above.

   ![Image of relevant screenshot]

   IMPORTANT!

   **Before submitting PA requests:**

   **Current users** (with a log-in and password from previous PA system)
   
   - must log-in and update your account; and
   - have it activated by DSHS.
   - follow steps 2-5 below.

   **New users** (without a log-in or password)
   
   - follow steps 7-10 below.

2. Log-in with your log-in name and password. This is the same name and password you had with the previous PA system.
3. Go to “My Account” (shown below)
   
   a. Enter all requested data fields (those that are not grayed out).
b. If you are an individual provider, click on “Case Manager – Non-group”.
c. If you are a case manager in a group, you will click on the drop down “Case Manager-with Group”.
d. Enter TPI and NPI information and click “save”.
e. Log out of PA system.

Example of Account Update for Individual Provider below:

See example of Case Manager with Group Account Update below. Note that each case manager in the group needs to update their account.
4. DSHS will receive notification of your entry and will verify that your information is entered correctly.
5. You will receive an email once the verification has occurred. At this point, you can log-in and enter prior authorizations. See step 11 below.
6. If you click on “Request Forms” prior to account verification, you will see the pop-up screen below. **Please be sure to complete all of step 3 above.**

7. **NEW USERS** must click “create a new account”. You must select from the options shown:
   a. Case Manager – With Group,
   b. Case Manager – Non-Group or
c. FQHC.
If you are unsure of which one to click on, please contact:
- Dagny Schmidt at 512-776-2168, dagny.schmidt@dshs.state.tx.us or
- Judi Mendez at 512-776-6694 or judi.mendez@dshs.state.tx.us

8. User ID for each CM in the group or for individual providers must be in the following format: Firstnamelastname (ex:cindysmith). No caps, no spaces.

   If you are a Case Manager – Non-Group, you won’t be able to fill in group name, group TPI or NPI. FQHCs will not enter CM NPI or TPI.

   Click “Create User”.
9. Once you hit “create user”, you will see this message:

Create Account

<table>
<thead>
<tr>
<th>Thank You!</th>
</tr>
</thead>
<tbody>
<tr>
<td>A user account has been created, but is not currently active. You will receive an email notification once the account is activated.</td>
</tr>
</tbody>
</table>
10. You will not be able to enter a Prior Authorization until your account has been activated. Once activated, you can proceed to step 11.

11. **SUBMITTING PRIOR AUTHORIZATION REQUESTS:**

Click on “Request Forms”. Follow the steps outlined below.

**Submission of Prior Authorizations via Case Management for Children and Pregnant Women Website (For use by approved providers only)**

The Case Management for Children and Pregnant Women program will accept the following requests through this website:

- CM-01 (Initial Prior Authorization Request)
- CM-06 (Request for Additional Visits)
- CM-06A (Request to Change Authorization to Another Case Manager)

The steps to use this process are:

1. Choose the type of request from the “Request Forms” tab.
2. Complete the form on the website and click “Submit”.
3. Click the “Print” button at the bottom of the page.
4. Print a copy of the generated PDF form for the client’s record.
5. Save the PDF form to your computer (optional).

The Case Management for Children and Pregnant Women program will fax back a response to you using the Response to Authorization Request form. If you are unable to submit electronically, you may fax requests to (512) 776-7574. If you have any questions, please contact Dagny Schmidt at (512) 776-2168 or submit email to askcm@dshs.state.tx.us.
Example of CM-01:

Parent/guardian: Do not type in periods. No symbols allowed.

PCP: Do not type in periods. No symbols allowed.

Required fields have a red asterisk*.

If client’s language is not listed in drop down, enter “other” and state their language in Psychosocial Section.
Click “Submit”. Then click “Print”. Save the PDF form for your records.

12. TO CHECK ON THE STATUS OF YOUR SUBMITTED REQUESTS:

   Click on “Request Search” under Search Tab.
Enter data fields to find information (i.e. Medicaid number, request type, request status).
Request Types listed in dropdown are: All, CM-01, CM-06 or CM-06A
Request Status listed in dropdown are: All, Submitted, Approved, or Denied
You can see that the authorization for client “test Boy” has been submitted. If you click on “view”, you can see the CM-01.

This shows that the authorization for “test Boy” was approved under “status” column. The status column will show all submitted requests as submitted, approved, or denied.

Providers will continue to be faxed the “Response to Authorization Request” detailing the numbers of visits authorized.

FAQs:

After this update to the system, will we be able to go back and see all previously submitted requests? Yes. You will be able to see all previous PA requests since implementation of the online PA submission, which was many years ago.

How do I hear the recorded webinar about the PA Training? Click on: https://www2.gotomeeting.com/register/791164866

Should we expect to have the same response time for authorizations as we have now? Or is this going to make that faster? It is expected that the response time will remain the same which is within three business days.
How do we change our phone number or email addresses for our account? *Your phone number is a required entry on each PA request so it not stored and does not auto-populate. If your email address changes, you will need to contact Dagny Schmidt.*

Will I still receive a faxed copy of the Prior Authorization Response form indicating the number of visits approved or if the PA is denied? *Yes.*

How long will it take for my account to be verified? *We hope to verify your account within 24 business hours.*

When will I be able to start entering in prior authorizations? *As soon as your account has been verified, you can enter PAs.*

Can I create my own username and password? *Follow the instructions above under #7. for New Users.*

What happens if I forget my username or password? *If you have forgotten your password, Click on “Forgot Password” on PA Submission website. If you have forgotten your username, contact Dagny Schmidt.*

What if I’m having problems with this system? *Contact Dagny Schmidt at 512-776-2168, dagny.schmidt@dshs.state.tx.us or Judi Mendez at 512-776-6694 or judi.mendez@dshs.state.tx.us*