

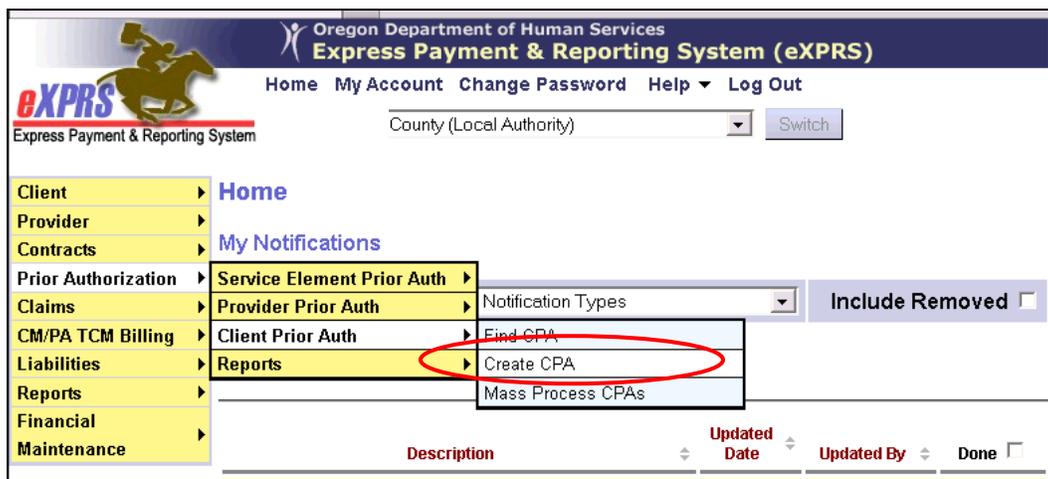
## How to Create a Client Prior Authorization (CPA) in eXPRS (general)

The Client Prior Authorization (CPA) is what authorizes services for a client to be delivered by a provider. A CPA must be in “accepted” status to be activated and thus allowing the provider to submit claims for payment against. CPAs are created and a submitted by the client’s CDDP.

**PLEASE NOTE:** To create a CPA for DAILY SE54 – Employment and Alternative Services, refer to the “[How to Create a Daily SE54 CPA](#)” guide.

### To create a CPA in eXPRS:

1. Login to eXPRS. The person doing this work must have either the **CPA Manager** user role or the **CPA Preparer** user role to create a CPA in eXPRS. If you have multiple roles in eXPRS, you’ll want to be working as the role appropriate for the work you’ll be doing.
2. From the **yellow** left-hand navigation menu, select **PRIOR AUTH → CLIENT PRIOR AUTH → CREATE CPA**. This will take you to the **Create Client Prior Authorization** page.



3. Once in the **Create Client Prior Authorization** page, you will work through the different sections of the CPA.

In Section #1, enter the client's **Prime Number** in the field shown. Click **NEXT**. This will auto-fill the client's name and move you to Section #2.

Client Prior Authorization: - Status: Draft

**1** Client to be Served:

Client Prime:

Add the Client's **PRIME** number here.

Click **NEXT** to continue.

4. In Section #2, in the **Service Element** drop down, select service you are creating the CPA for; this will auto-fill the rest of this section. If not, select **"ALL"** in the fields remaining. Click **NEXT** to move to Section #3.

Create Client Prior Authorization

Client Prior Authorization: - Status: Draft

**1** Client to be Served:

Client Prime: XXX0000X Client Name: Mickey Mouse

**2** Service to be Provided:

Service Element:  Proc Code: Svc Modifier Cd:

Select the service element number from the drop down.

Click **NEXT** to continue.

5. In Section #3, from the drop down menu, select the provider of the service. Click **NEXT** to open the next fields in this section.

Client Prior Authorization: - Status: Draft

**1** Client to be Served:  
 Client Prime: XXX0000X      Client Name: Mickey Mouse

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**2** Service to be Provided:  
 Service Element: 50      Proc Code: All      Svc Modifier Cd: All

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**3** Provider of Service:  
 Provider ID: 10513 - HOME LIFE INC      Next

Select the provider of the service from the drop down menu.

Click **NEXT** to continue.

In the **Service Area** box, select site address or service area of the service to be provided. You may only have one choice. Click **NEXT** to move to Section #4.

Client Prior Authorization: - Status: Draft

**1** Client to be Served:  
 Client Prime: AHB2790A      Client Name: LINDA BACH

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**2** Service to be Provided:  
 Service Element: 50      Proc Code: All      Svc Modifier Cd: All

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**3** Provider of Service:  
 Provider: HOME LIFE INC      Provider ID: 10513  
 Address: PO BOX 86      Phone: (541) 753-9015  
 City/State: CORVALLIS OR  
 Site: HOME LIFE INC SE50 2515 NW Fillmore (7/22/2010 to 12/31/9999)      Next

Select the site location or service area that applies for the client service from the drop down menu.

Click **NEXT** to continue.

6. In Section #4, from the drop down menu, select the **DHS contract number** that applies for the date range of the service. Click **NEXT** to move to Section #5.

**Client Prior Authorization: - Status: Draft**

**1 Client to be Served:**  
 Client Prime: XXX0000X      Client Name: Mickey Mouse

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**2 Service to be Provided:**  
 Service Element: 50      Proc Code: All      Svc Modifier Cd: All

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**3 Provider of Service:**  
 Provider: HOME LIFE INC      Provider ID: 10513  
 Address: PO BOX 86      Phone: (541) 753-9015  
 City/State: CORVALLIS OR  
 Site: 2515 NW Fillmore

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**4 DHS Contract Funding Services:**  
 DHS Contract Num:  County

Select the applicable contract from the drop down menu.

Click **NEXT** to continue.

7. In Section #5, enter the **Effective Date** (the first date of the service authorization) and the **End Date (the last date of the service authorization)** for the service for this person.

**5 Rate and Duration of Services:**

Effective Date: 10/1/2011       End Date: 6/30/2013       Ongoing: Y

Enter the first day of the service authorization here.

Click **NEXT** to continue.

Enter the last day of the service authorization (or the last day of the contract period, if ongoing)

If the service is expected to be ongoing, enter the last day of the biennium and select “Y” in the **Ongoing?** field. If not, select the appropriate **END DATE** and “N” in the **Ongoing?** field. Click **NEXT** to continue.

8. Add the number of units rate (which may auto-fill for you) and the rate for the service. You can also add any notes you wish in the **Add Notes** field. Click **NEXT** to continue.

The screenshot shows a form titled "Rate and Duration of Services:" with the following fields and values:

Effective Date:	10/1/2011	End Date:	6/30/2013	Ongoing:	Y
Unit Type:	Months_Pro-rated	Units:	1	Rate:	4600.00
Amount:					
Notes:	<div style="border: 1px solid red; border-radius: 15px; padding: 5px; display: inline-block;">Enter the service rate here.</div>				
Add Notes:	<div style="border: 1px solid red; border-radius: 15px; padding: 5px; display: inline-block;">Add any notes here.</div>				

At the bottom of the form are three buttons: "Next", "Previous", and "Cancel". A red callout box points to the "Next" button with the text: "Click **NEXT** to continue."

A large number "5" is positioned to the left of the "Notes" field.

9. Click **SAVE**. If you have the CPA Preparer role, this is all you can do.
10. If you have the CPA Manager role, click **SUBMIT** to activate the CPA in the system.
11. Once you've completed your work, you may want to review the status of the CPA.
  - a. If it's in "**Accepted**" status, then nothing else needs to be done.
  - b. If in "**Pending**", then it requires State staff review/acceptance.

- c. If still in “**Draft**” status, you most likely got an error message when you attempted to submit. Refer to the appropriate “**CPA Problem Solving Matrix**” guide for assistance.