

Creating a Client Prior Authorization for Brokerage Enrollments

(Brokerage Instructions)

To enroll an individual with a Brokerage in eXPRS, two Client Prior Authorizations are required:

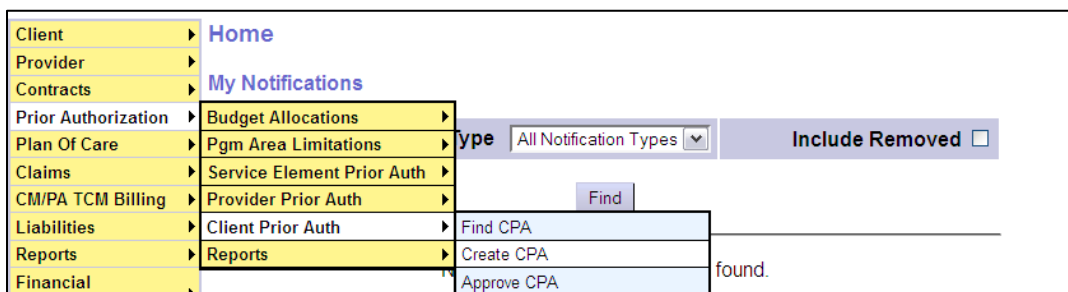
- 1) An SE48 CPA from the individual’s Community Developmental Disabilities Program (CDDP) designating the Brokerage, **and**
- 2) An SE148 CPA from the Brokerage.

Prior to completing a CPA, the CDDP and the Brokerage must communicate and agree on the individual’s enrollment date of their services with the brokerage.

The SE48 CPA from the CDDP that designates the brokerage for the individual is required in eXPRS first. Once the CDDP enters this CPA, the Brokerage can enter their SE148 CPA. To complete this work, a user must have the **CPA Manager** role.

Creating an SE148 Brokerage Case Management Client Prior Authorization

1. From the left navigation, select **Prior Authorization > Client Prior Auth > Create CPA**.



2. In Section 1, search for or enter the prime number for the individual, then click **Next**.

1 Client Prior Authorization: - Status: Draft

Client to be Served:

Client Prime: AM3 Next

3. In Section 2, select "148" from the **Service Element** dropdown menu, and then select the applicable service procedure code. In the example below, ORBCM is selected.

2 Service to be Provided:

Service Element: 148 Proc Code: PATCM Svc Modifier Cd: All Next

3 ORBCM

PATCM

Prov PAWCM Service:

4. In Section 3, the **Provider ID** dropdown will likely pre-populate. If needed, select the Provider record and then select **Next**.

3 Provider of Service:

Provider ID: 12299 - BROKERAGE ONE /Case Mgmt Prov Next

5. Additional fields will appear in Section 3. In the Service Area box, select the correct record for your Brokerage, then select **Next**.

3 Provider of Service:

Provider: BROKERAGE ONE /Case Mgmt Prov Provider ID: 12299

Address: 1 Phone: (012) 345-6789

City/State: a OR

Service Area: Next

4 BROKERAGE ONE /Case Mgmt SE148 Clackamas PATCM (7/1/2009 to 12/31/9999)

BROKERAGE ONE /Case Mgmt SE148 Multnomah PATCM (7/1/2009 to 12/31/9999)

BROKERAGE ONE /Case Mgmt Prov SE148 Statewide (7/1/2009 to 12/31/9999)

6. In section 4, the **DHS Contract Num** will likely pre-fill. Ensure this is correct and click **Next**.

4 DHS Contract Funding Services:

DHS Contract Num: 157867 - BROKERAGE ONE Next

7. In Section 5, enter the **Effective Date** and **End Date** of the service in the fields provided. Then select **"Y"** or **"N"** in the **Ongoing** dropdown and click **Next**.

5

Rate and Duration of Services:		
Effective Date:	<input type="text"/>	End Date: <input type="text"/>
		Ongoing: <input type="text"/>
		<input type="text"/>
		<input type="text"/>

Next Previous Delete Cancel

8. In the Notes field, enter any information about the authorization needed. Then click **Next**.

5

Rate and Duration of Services:		
Effective Date:	11/1/2013	End Date: 12/31/2013
		Ongoing: Y
Unit Type:	Days	Units: 1
		Rate: 174.14
Notes:	<input type="text"/>	
Add Notes:	<input type="text"/>	

Next Previous Delete Cancel

9. If you have the CPA Manager role, click **Submit** to activate the CPA in the system.

Added Notes:	Add any notes
	<input type="text"/>

Previous Save Submit Cancel

10. Once you've completed your work, you may want to review the status of the CPA.

- **Accepted:** The authorization is active.
- **Pending:** The authorization requires State staff review/acceptance (for geographical exceptions).
- **Draft:** The authorization is not active, and likely needs further action before it is accepted.