Brokerage Client Prior Authorization (CPA) Problem Solving Matrix

For a Brokerage to be able to authorize services to an individual with I/DD, an SE148 Personal Agent Services CPA must exist in eXPRS. Client Prior Authorizations (CPAs) are saved to **_draft_** status initially. It must then be submitted through various system validation edits to ensure that the authorization can be successfully activated for Brokerage Case Management services.

There are times that a CPA may encounter errors. Below are some of the more common errors a user may see if a CPA fails to pass validation.

Error message	What it means	How to fix it
CICS [service or DD or Medicaid] eligibility Web Service not available: [additional technical information]	There is a problem with the Web Service interface, preventing eXPRS from connecting to other DHS information systems.	This not an eXPRS issue. It is related to the other systems that eXPRS retrieves client eligibility information from and can occur without notice. Wait and try again later to see if the issue has corrected itself or report the problem to the OIS Service Desk by email or at 503-945-5623. They may ask you share the entire error message.
Client Prior Auth Submit failed: No valid Case Management enrollment for	There is no SE48 Case Management CPA(s) in **Accepted** status designating your Brokerage for	Work with the respective CDDP(s) to ensure that SE48 CM CPA(s) designating your Brokerage exist and are in **Accepted** status.

this client found within this CPA effective date range.	the individual that covers the entire date range of the SE148 PA Services CPA being submitted. These CPA(s) must cover the entire date range of the SE148 CPA. They can be from multiple CDDPs, as long as: The CPA(s) designate your brokerage The CPA(s) dates are chronologically consecutive (without date gaps)	These CPA(s) must cover the entire date range for the SE148 CPA being submitted. Once they exist and are in **Accepted** status, re-submit your SE148 CPA.
Client Prior Auth Submit failed: Personal Agent enrollments must be enrolled to the same brokerage as assigned by their Case Management enrollment	The SE48 CM CPA lists a different brokerage other than yours. This may occur when a client transfers brokerages (but not CDDPs), and the CDDP has not ended the old SE48 CM CPA with the old brokerage designation and started a new SE48 CM CPA with the new brokerage designation.	Work with the CDDP in question to get the SE48 CM CPAs corrected. Once corrected, re-submit your SE148 CPA.
Client Prior Auth Submit failed: Client currently has an accepted CPA for this service element under [X] *Brokerage and* [X] *(Case Mgmt Prov)* *X = name of the other Brokerage*	Another **Accepted** SE148 CPA exists with another Brokerage for this individual for this date range. This error message occurs most often when an individual transfers between brokerages. It will display even if only one day overlaps between the SE148 CPAs.	Work with the Brokerage to end their SE148 CPA. Additionally, work with the CME if needed, as a SE48 CM CPA designating your Brokerage may also need to be created. Once completed, re-submit your SE148 CPA.

Client Prior Auth Submit failed: Client is not DD Eligible	The individual's record has an invalid Service Eligibility code, or their eligibility code is missing.	Verify the correct eligibility is in place. To do this, follow the steps in: **How to View Client Information in eXPRS**
		If the necessary case code is missing or incorrect, contact the client's CDDP and verify that the CDDP has submitted a current DHS-0337 form and/or TXIX Waiver form to the DDPTAU for the client listing their enrollment status with your Brokerage.
		You may also need to assist the client to apply for Medicaid medical benefits, if they have not already done so.
		The DHS-0337 form may be in process, so you might want to check the client's profile every few days or so. Once the correct code has been applied to the client's profile, resubmit the CPA.
Client Prior Auth Submit failed: Client is not eligible for Case Management. Please call or e-mail your DDPTAU representative.	There is no SE48 CPA in "accepted" status for the client at all. The system sees the client as not eligible or enrolled in DD Case Mgmt services.	Contact the CDDP in question and work with them to confirm the client is eligible and enrolled in DD Case Mgmt services (SE48). The CDDP should confirm the DHS-0337 & TXIX forms have been completed & submitted to the DDPTAU, and that their SE48 CPA has your Brokerage designated.
		Once all those steps are completed, re-submit your SE148 CPA
Client Prior Auth Submit failed: Client is not eligible for Brokerage Services.	There is no SE48 with assigned Brokerage **and/or** no case coding on the client's profile that shows Brokerage service eligibility.	Contact the CDDP in question and work with them to confirm the client is eligible and enrolled in DD Case Mgmt services (SE48). The CDDP should confirm updated DHS-

Please call or e-mail your DDPTAU representative		0337 & TXIX forms have been completed & submitted to the DDPTAU listing Brokerage enrollment, and that their SE48 CPA has your Brokerage designated. Once all those steps are completed, re-submit your SE148 CPA
Client Prior Authorization save failed: Invalid Provider Service location OR *Client Prior Authorization submit failed: Invalid Provider Service location*	The service area location for the Brokerage in Section 3 of the CPA is either missing from the CPA, or is not valid (incorrect). For Brokerages, the service area is the location of the Brokerage office the Personal Agent for the individual works from. In some cases, the Brokerage may only have one option available in this field.	Edit the existing DRAFT CPA, to add the correct service area information. See the "***How to Edit a CPA***" guide on the **HELP** tab in eXPRS for instructions on how to edit a CPA.

If you are still unable to determine why the CPA is getting an error message, call the **DHS SERVICE DESK – 503-945-5623** and report the issue. A service ticket will be generated & someone will work with you to correct the problem. But please, try and see if you can resolve the issue yourself before calling the DHS Service Desk.