

## How to Accept a SEPA in eXPRS

*(updated 3/11/2019)*

As a Case Management Entity (CME), part of the work needed in eXPRS is to Accept the Service Element Prior Authorizations (SEPAs) for the services you perform as a CME & are directly paid for (case management and/or administrative services). The SEPA is the contractual element in eXPRS that increases or reduces the funding limits for services you provide. SEPAs for other direct client services that are paid directly from eXPRS to other rendering providers are managed & accepted by ODDS.

The services that a CME must accepted a SEPA for are:

CME Type	Accepts SEPAs for:
CDDPs (Local Authority)	<ul style="list-style-type: none"> <li>• <b>SE48</b>-CDDP Case Mgmt Svcs</li> <li>• <b>SE02</b>-DD Admin</li> <li>• <b>SE55</b>-Abuse Investigation Services</li> </ul>
Brokerages (Contractor)	<ul style="list-style-type: none"> <li>• <b>SE148</b>-Brokerage Case Mgmt Svcs</li> </ul>
State Kids (Local Authority)	<ul style="list-style-type: none"> <li>• ODDS Manages all SEPAs for State Kids Svcs</li> </ul>

To accept a SEPA, users must have the below roles assigned for their CME:

- **Local Authority IGA Manager** (CDDPs)
- **Contractor IGA Manager** (Brokerage)

→ **IMPORTANT:** Before you can accept a SEPA, you must first set up your **SEPA APPROVAL PASSCODE** (also called the passphrase). Please see the [How to set up your SEPA Approval Passcode](#) user guide for instructions on how to do that.

**Once your passcode/passphrase has been set up and activated, follow these next steps to accept a SEPA.**

1. Log into eXPRS. If users have more than one organization login option, they will need to be logged in under the **Local Authority** (for CDDPs),

**Login**

Password accepted. Choose your organization and/or program area for this session.

You are in the Practice environment

**Login Name:**

**Password:**

**Organization/Program Area:**

[Forgot your password?](#)

or **Contractor** (for Brokerages)

**Login**

Password accepted. Choose your organization and/or program area for this session.

You are in the Practice environment

**Login Name:**

**Password:**

**Organization/Program Area:**

[Forgot your password?](#)

2. If you have a notification message listed under **“My Notifications”**, click on the [blue hyperlink](#) for the SEPA notification. This will open the SEPA for you to accept it.

**Home**

**My Notifications**

**Filtered By Type**  **Include Removed**

Description	Updated Date	Updated By	Done <input type="checkbox"/>
<a href="#">Service Element Prior Auth 272</a> 58 Awaits Contractor Acceptance	3/11/2019		Remove <input type="checkbox"/>
<a href="#">Service Element Prior Auth 272</a> 54 Awaits Contractor Acceptance	3/11/2019		Remove <input type="checkbox"/>

- With the SEPA open, you can confirm if the SEPA is one that needs you to take action. SEPA's that you must accept as a CME will have a status of **Pending Acceptance** (meaning, waiting for your action to "accept" the SEPA). Click **CONTINUE** to proceed to accept the SEPA.

**Service Element Prior Authorization**

DHS Contract Num: 14\*\*\*7      SEPA Approval Unit #: 272\*\*\*\*\*58

Contractor Name: County

Prior Auth Ref Num	ID	Service Element	Effective Date	Amount	Status	Approval Status
DS3	2	2 9 48	7/1/2018	\$250,000.00	Pending	Acceptance
<b>Total</b>				<b>\$250,000.00</b>		

Continue    Cancel

- Scroll down the SEPA details page until you find the section **SEPA APPROVAL PASSCODE**. In the box, enter the password you created in your user profile for SEPA approval.

**Service Element Prior Authorization Adjustment**

SEPA Approval Unit #: 272\*\*\*\*58

DHS Contract Num: 14\*\*\*\*7      Contractor Name: County

**SEPA Adjustment Lines**

SE	Proc Code	Svc Modifier Cd	Effective Date	End Date	Units	Amount	Special Condition	Client Prime
48	All	All	7/1/2018	6/30/2019	0	\$250,000.00		
<b>Total</b>						<b>0 \$250,000.00</b>		
<b>Grand Total</b>						<b>0 \$250,000.00</b>		

**Special Condition**

**Clients**

Client Prime	SE	Last Name	First Name	Birth Date	Amount	Desig

**Required Units of Service by Month (for this Adjustment)**

Year	2017												2018												2019											
	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6												
Month	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6												
SE 48	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0												

SEPA Approval Passcode:

Approve    Reject    Previous    Cancel

- With your personal SEPA Approval Passcode entered, click **APPROVE** to accept the SEPA.

The screenshot shows a web interface for SEPA approval. At the top, there is a 'Clients' table with columns: Client Prime, SE, Last Name, First Name, Birth Date, Amount, and Desig. Below this is a table titled 'Required Units of Service by Month (for this Adjustment)' with columns for Year (2017, 2018, 2019) and Month (7-12 for each year). The row for 'SE 48' shows zeros for all months. Below the tables is a 'SEPA Approval Passcode:' field with a yellow background and a pink box around the dots. A pink arrow points to the 'Approve' button at the bottom.

- Once the approval process is completed, you will receive a confirmation message & the status of the SEPA will now show as **accepted**. The SEPA acceptance is completed for that SEPA.

The screenshot shows the 'Service Element Prior Authorization' confirmation page. A pink box highlights the message 'Service Element Prior Auth Approval Unit Approve succeeded.' Below this, there are fields for 'DHS Contract Num: 14\*\*\*7' and 'SEPA Approval Unit #: 272\*\*\*58', and 'Contractor Name: County'. A table below shows the details of the authorization:

Prior Auth Ref Num	ID	Service Element	Effective Date	Amount	Status	Approval Status
DS3	2	27 9 48	7/1/2018	\$250,000.00	Accepted	
<b>Total</b>				<b>\$250,000.00</b>		

A pink arrow points from the success message to the 'Accepted' status in the table.

- You can now return to your eXPRS **Home** page. If you have notifications for other SEPA's that need your acceptance, repeat steps 2-6 above. Once completed, can check the box next to the notification in the **DONE?** Column & then click **REMOVE**. This will clear the notification from your list.

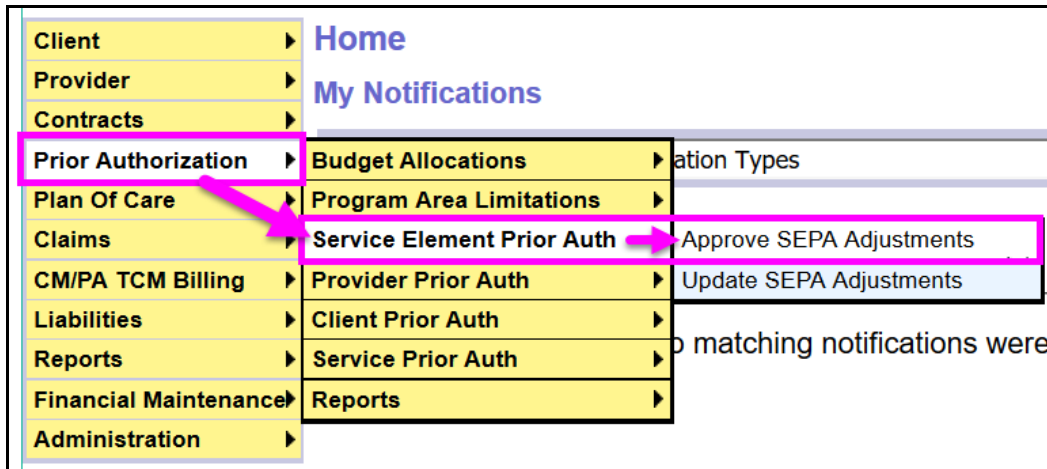
The screenshot shows the 'Home' page with 'My Notifications'. There is a filter dropdown set to 'All Notification Types' and an 'Include Removed' checkbox. A table lists notifications:

Description	Updated Date	Updated By	Done
Service Element Prior Auth 27 58 Awaits Contractor Acceptance	3/11/2019		Remove <input checked="" type="checkbox"/>
Service Element Prior Auth 272 54 Awaits Contractor Acceptance	3/11/2019		Remove <input type="checkbox"/>

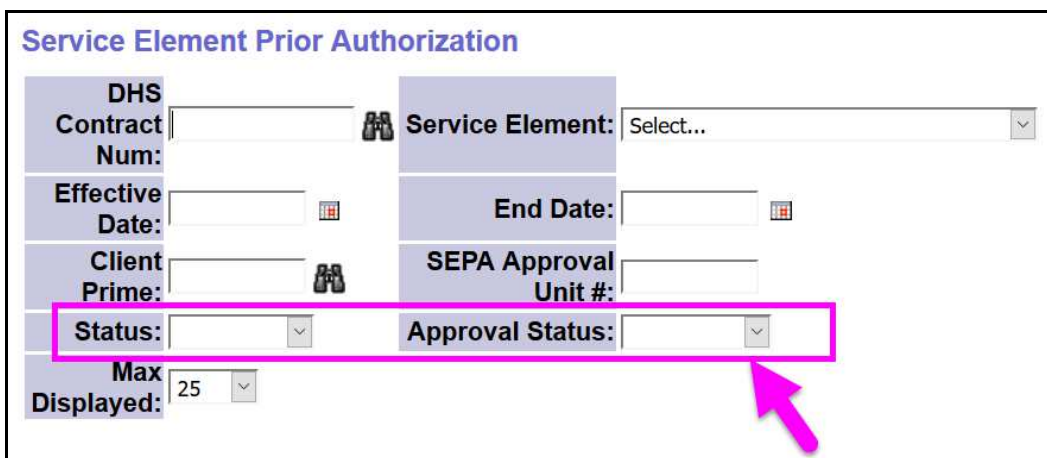
A pink arrow points to the 'Remove' button at the bottom of the page.

Instead of using the notification links, you can search to find any SEPA's that may be waiting for your acceptance.

1. Login, if needed (step 1 above). From the left-hand navigation menu on your HOME page, click on **PRIOR AUTHORIZATION** → **SERVICE ELEMENT PRIOR AUTH** → **APPROVE SEPA ADJUSTMENTS**.



2. In the **Service Element Prior Authorization** page, search by the SEPA status for those SEPA's you need to accept.



3. SEPA's that need your approval to accept have a status of:
  - Status = **PENDING**
  - Approval Status = **ACCEPTANCE**

With these statuses selected, click **FIND** to get a list of the SEPA's that you need to approve/accept.

**Service Element Prior Authorization**

DHS Contract Num:  Service Element:

Effective Date:  End Date:

Client Prime:  SEPA Approval Unit #:

Status:  Approval Status:

Max Displayed:

- From the results list returned, click on the [blue hyperlink](#) number in the **Unit ID** column for the SEPA that has a status of **PENDING ACCEPTANCE**. This opens the SEPA.

**Service Element Prior Authorization**

DHS Contract Num:  Service Element:

Effective Date:  End Date:

Client Prime:  SEPA Approval Unit #:

Status:  Approval Status:

Max Displayed:

Unit ID	DHS Contract Num	Approval Status	Filtered Amount	Total Amount	Updated By	Updated Date
<a href="#">272****54</a>	14 7	Pending Acceptance	\$125,000.00	\$125,000.00		3/11/2019
<b>Totals:</b>			<b>\$125,000.00</b>	<b>\$125,000.00</b>		

- With the SEPA open, you can confirm if the SEPA is one that needs you to take action. SEPA's that you must accept as a CME will have a status of **Pending Acceptance** (meaning, waiting for your action to "accept" the SEPA).

**Service Element Prior Authorization**

DHS Contract Num: 14\*\*\*\*7 SEPA Approval Unit #: 272\*\*\*\*54

Contractor Name: County

Prior Auth Ref Num	ID	Service Element	Effective Date	Amount	Status	Approval Status
DS4 3	27 5 2		7/1/2017	\$50,000.00	Pending	Acceptance
DS4 2	27 6 55		7/1/2017	\$75,000.00	Pending	Acceptance
<b>Total</b>				<b>\$125,000.00</b>		

Click **CONTINUE** to proceed to accept the SEPA.

6. Scroll down the SEPA details page until you find the section **SEPA APPROVAL PASSCODE**.

**Service Element Prior Authorization Adjustment**

SEPA Approval Unit #: 7007954

Required Units by Month (for this SEPA)

Year	2017												2018												2019					
Month	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6						
SF 2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
SE 55	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						

SEPA Approval Passcode:

Approve Reject Previous Cancel

7. In the box, enter the **SEPA Approval Passcode** (password) you created in your user profile for SEPA approval, then click **APPROVE** to accept the SEPA.

SEPA Approval Passcode:

Approve Reject Previous Cancel

8. Once the approval process is completed, you will receive a confirmation message & the status of the SEPA will now show as **accepted**.

**Service Element Prior Authorization**

Service Element Prior Auth Approval Unit Approve succeeded.

DHS Contract Num: 14\*\*\*7      SEPA Approval Unit #: 272\*\*\*54

Contractor Name: County

Prior Auth Ref Num	ID	Service Element	Effective Date	Amount	Status	Approval Status
DS4	3	27 5 2	7/1/2017	\$50,000.00	Accepted	
DS4	2	27 6 55	7/1/2017	\$75,000.00	Accepted	
<b>Total</b>				<b>\$125,000.00</b>		

The SEPA acceptance is completed for that SEPA.

9. Click **HOME** at the top of the window to take you back to the home page.
10. Repeat steps #1 - #8 to search for & approve/accept any additional SEPAs that you have in a status of **PENDING ACCEPTANCE**.