CSINetworkServices™
An Option Care Health Company

Portal Guide

Logging into AlayaCare

- Once the Agency Admin has created your user account
- Log in using the following link: **csi.alayacare.com**
- Username: your email address
- Password: First time login, use the "Forgot Password?" link to set your password
- You will receive an email to reset your password
- Once set, log in with the password you created

Agency with multiple locations (Parent Account)

If you have been setup by your Admin to have access to all locations under a Parent account

- Select the appropriate location for your patient (client) by going to the **upper right corner** after the Parent Account, on the drop-down box and scroll down to select the location

Example: "Option Health" is the Parent account, and all locations will follow the parent (i.e. Branch A or Branch B)
Before creating and submitting a new referral check to ensure the correct location has been selected

Communication to CSI via the portal

One of the 3 client forms listed below must be completed for CSI to receive and process patient information
Click on Client's name, select *Add forms*, select *none* under service, under forms select for type of form needed and click on *start filling*

1. **CSI New Referral Request** - follow the initiate new patient referral
2. **Mail Message**- can be used to upload additional clinicals, request a change or correction on the information provided, insurance update, authorization status update: in the comment section provide details of what is needed
3. **Patient Additional Authorization form**- For ongoing auth request or a new service that needs added to an existing account this form should be used selecting the correct feature and uploading orders or clinicals

Once CSI receives your portal request, our team will start the verification process and authorization if needed
CSI's team will communicate via fax or email notifying you of the benefits and auth once completed
New referral request form can also be used for a BENEFIT CHECK to determine if you can accept that plan, in the comment section type BENFIT CHECK ONLY and complete all required fields. If the case is accepted by your agency use the Patient Additional Auth form when requesting your authorization

CSI New Referral Request form (client form)

- Click the "**Clients**" icon on the (left side task bar) The default page "Client List" will appear
- Click "**+ Client**" to add patients name (upper right side of the screen)

COMPLETE THESE THREE (3) STEPS BEFORE CLICKING ON ADD NEW CLIENT (PATIENT)
STEP 1) Add Patients basic information:

- Enter Required fields (marked with *)
- First Name
- Last Name
- Date of Birth (not * but is recommended)

For agencies with multiple locations be sure your appropriate location is selected. DO NOT use Parent Account

STEP 2) Matching Profiles: system is identifying if your agency has any other patient (client) with that name, if none appears, you can move on to Step 3
NOTE: IF a patient(client) does appear in this section with that same name STOP and review identifiers to confirm if this is a true NEW PATIENT referral. IF needed click cancel and move to Additional Auth request on page 3

IMPORTANT
STEP 3) Intake Form: On the intake form box click the dropdown and select "**CSI New Referral Request**"

- Click add new Client (bottom left side)

You will now be directed to complete the: "**CSI New Referral Request Form**"
NOTE: If **this form does not open, you may not have chosen CSI New Request Form from the drop-down (step 3)**
Exit this section and follow this guide on Manually adding the CSI New Referral Form

Continuation of CSI New Referral Request Form

You are now directed to complete 6 different sections on this New Referral form

- Required fields are displayed with an asterisk (*) and the form cannot be submitted without those fields completed
- When entering DOB's (or any date field) click on the year and type in the year first. Then use the left or right arrow to move to the appropriate month, then click on the DAY. This way you do not have to click up or down to get to the correct year

Click "**Next Section**" to get to the next page, or "**Previous Section**" to navigate between pages of the form

1. **Patient Demographics:**
   - Complete all * fields **See above tips on entering dates**
   - Whenever available please include the patients' email address when submitting your referral, if an email is not available at the time of submitting the referral, please update via a Mail Message when available
2. **Medical Detail: (diagnosis) Add DX**
   - Complete as many details as possible
   - Enter DX related to the Home Care Service
   - To add additional DX click Add current Medical DX
   - Type a keyword of the diagnosis, then select from the dropdown of choices
   - You may need to enter more information to narrow down the selection as there are only 7 results that will populate
   - You can enter the ICD-10 code without the period. example, enter L03032 instead of L03.032
3. **Physician: NPI is required (if unknown click look up Physicians NPI icon)**
   - Complete referring/ordering physician required fields
   - Upload documents (**review your authorization guide for required clinicals per payer**)
   - All documents must be in PDF format, only 1 document can be uploaded per file line

   THIS IS THE ONLY PLACE TO UPLOAD CLICNICALS ON THIS FORM
4. **Service:** Click on the + sign to select all services needed
   - **Start date is required even for Benefit check only**
   - **If the admission date changes after the authorization has been secured, please send a portal mail message to notify the CSI Auth team of the revised SOC date**
5. **Primary Insurance:**
   - Complete all required * fields
6. **Secondary Insurance:**
   - Add any secondary plan to ensure patient's account is set up correctly, even if the plan is not in-network with CSI. Example: Medicare /Medicaid plans

New referral request form for a BENEFIT CHECK to determine if you can accept that plan, in the comment section type BENFIT CHECK ONLY complete all required fields. If the case is accepted by your agency use the Patient Additional Auth form when requesting your Auth

- Once all sections are complete, click "**Submit Form**." If any required fields were missed, it will take you back to those fields highlighted in red to complete
- A completed form will appear on screen after it has been successfully submitted and will be marked as **Approved** which means submitted to CSI for processing
- The patient will now show **Pending** on your client list. Under the client icon (left side task bar)
- Once the form has been submitted no further changes can be made, you will need to call CSI to update any changes or use the mail message form on the portal. Contact information for the CSI Authorization group is 440.717.1700 option 1, then option 2.
  - If there are minor discrepancies with a name or DOB (i.e., spelling, or transposed numbers) CSI may update and correct in AlayaCare to match the patient's insurance and notify your agency of the correction via the CSI authorization form. Please ensure your internal systems are updated so claims are sent with correct information
- CSI will start the process to complete the benefit check and auth (if needed) within 24-48 hours.
- Once completed an email or fax will be sent to your agency. Follow the steps for **Processing Marketplace Referrals** to update the pending case to active on the portal

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Mail Message form (client form)

- Click the "**Clients**" icon (left side task bar) of the screen
- Enter the patient's name on the **find field** on the right side of screen
- Ensure the **Status filter** (upper left) includes '**All**' to capture Pending or Active patients
- Click on the patient
- The Care Management tab will be the default screen when it first opens
- Click on **Client Forms** (left side of the screen)
- Click on the X next to unapproved (next to date)
- Click on **+ client** form (upper right side)
- Add Form for patient name will pop-up
- Under **Service** select **NONE**
- Under **Form** from the drop-down select **mail message**
- Click on **Start Filling**
- Complete message and upload documents if needed
- Click on **Submit form   CSI team will respond via FAX, Email or Phone when needed**

Patient Additional Authorization Request form (client form)

This form is to request additional (ongoing) authorizations or add a new service(s) on an existing patient. Ongoing or new auth services request can be made on Active or Pended case

- Click the "**Clients**" icon (left side task bar) of the screen
  - Enter the patient's name on the **find field** on the right side of screen
  - Ensure the **Status filter** (upper right) includes '**All**' to capture Pending or Active patients
  - Click on the patient
  - The **Care Management tab** will be the default screen when it first opens
  - Click on **Client Forms** (left side of the screen)
  - Click on **add client** form (upper right side)
  - Add Form for patient name will pop-up
  - Under **Service** select **NONE** if it does not default to none
  - Under **Form** from the drop-down select **Patient Additional Authorization**
  - Click on **Start Filling: Complete all fields with ***
    - **Request type:**
      - Ongoing visits requested: when additional visits are needed to existing services
      - New Service request: case needs to add a new service
    - **Service Requested**: click on **+ symbol** from the drop-down menu and complete all Fields
    - Upload clinicals to support your request click **submit form**
  - A completed form will appear on the screen that shows approved, and NO further changes can be made, you will need to call CSI Auth team at 440-717-1700 option1, option 2. or send a mail message for any change request
  - Approved means you have provided enough info to send your request to CSI, it is **NOT** AUTH approval

Manually adding the "CSI New Referral Request" form

If you missed step 3 on the new referral request form when setting up the new patient follow these steps to request a new referral

- Click the "**Clients**" icon (left side task bar) of the screen.
  - Enter the patient's name on the **find field** on the right side of screen
  - Ensure the **Status filter** (upper right) includes '**All**' to capture Pending or Active patients
  - Click on the patient
  - The **Care Management tab** will be the default screen when it first opens
  - Click on **Client Forms** (left side of the screen)
  - Click on **add client form** (upper right side)
  - Add Form for patient name will pop-up
  - Under **Service** select **NONE** if it does not default to none
  - Under **Form** from the drop-down select **CSI New Referral Request**
  - Click "Start Filling"
  - Complete the CSI NEW Referral Request Form by following the directions on pages 1- 2

View Client Forms

Client forms are forms sent to CSI by your agency, new referral forms, mail message, and ongoing auth request

- Click the "Client (task bar left side)
- Click the "**Client list** under the task bar (top of the page)
- Ensure the **Status filter** (upper right) includes '**All**' to capture patients
- Enter patient's name in the Find field (right side) or click on the patients
- System will show the Case Management top header
- Click on Client Forms
- Uncheck the approved box in the header
- Click on **view** (right side) screen, if you click on the arrow down symbol, it will take you to the print screen

Processing Posted Referrals in Marketplace

All referrals that are processed by CSI will show as "Posted" (CSI has worked the case) under the client intake, marketplace list and will need to be processed by your agency to move the case from pending status on the Client List to active. This will also allow the Auth to be reviewed on the Auth Dashboard within the data exploration.

- Steps to view and process Posted Referrals
    - Select the appropriate agency location at the upper right corner (if applicable)
    - Click the "**Dashboard**" icon on the (left side task bar) of the screen
    - Click "**Client Intake**" on the menu header above
    - Click "**Marketplace Referrals**" on the right side of the screen
    - The "**From**" date filter can be altered to capture all referrals within a date period to be processed OR, click the **X** on the dates to clear them out and use the Search field to search by patient name
    - Click "**Status**" to select only "**Posted referrals**" from the drop-down box which will capture all referrals that need processed based on the from date filter or patients search
    - If you have requested multiple services on a patient, there will be one (1) line for each service that needs processed
    - Once you have found your patient on the posted referral list
    - Click on the arrow down button next to View and select "Process" from the drop-down box
    - A window will open "**Process Referral**" which has two options **(step 1) +New Client and Service**, **(step 2) +New Service**

➢ **FIRST Review the Client listed on this page that was previously created on the portal, if there is only 1 client listed, and the information is correct move to Step 2**

➢ **If multiple patients are listed with the same name review the patient data to ensure you are selecting the correct patient**

- **Step 1 will create a New Client *and* Service (only choose this if there is no client listed), this will create a new client based on the information in the referral and add a new client to the client list**
    - For multiple service lines only choose New Client and Service on the **first** service line all other services follow Step 2
- **Step 2 Click on "New Service" to add the service line to the client previously created that is listed on this page and on the marketplace referral screen (the service will not show on this screen until it has been processed)**
    - There will be a confirmation screen that opens:
    - Click on the "**Process Referral**"
    - Repeat Step 2 for multiple service lines on a referral until all lines are processed

- The Status on these referrals will change from **Posted** to **Processed** and on the client list the case will show ACTIVE. If you do not process all referrals that are posted, you will not see the Authorizations in the accounting tab or any attachments within. The patients' case will remain as pending on the client list as well.

*** NOTE: To avoid creating a duplicate account, please only use Step1 New Client and Service when the client does not already have an account listed on the portal. This step should be used solely to create the client's initial account from the first service line; all additional services would be entered using Step 2 New Service**

Processing POSTED Carelon Referrals

- Follow the above process for posting referrals on Marketplace:

➢ **Another window will open "Process Referral which has two Sections Step 1 and Step 2**

- **Step 1 Select NEW Client and Service for the first service line ONLY; this will create the patient account on the AlayaCare portal since Carelon patients are not entered by your agency**
    - There will be a confirmation screen that opens:
    - Click on the "Process Referral"
- **Step 2 All subsequent service lines should be processed under New Service**
    - There will be a confirmation screen that opens:
    - Click on the "Process Referral"
    - Repeat Step 2 for multiple service lines on a referral until all lines are processed
- The Status on these referrals will change from **Posted** to **Processed** and on the client list the case will show ACTIVE. If you do not process all referrals that are posted, you will not see the Authorizations in the accounting tab or any attachments within. The patients' case will remain as pending on the client list as well.

NOTE: To avoid creating a duplicate account, please only use Step 1 New Client and Service when the client does not already have an account listed on the portal. This step should be used solely to create the client's initial account from the first service line; all additional services would be entered using Step 2 New Service

View and Find Attachments

- Click the "**Client**" (task bar left side)
- Click the "**Client list**" under the task bar (top of the page)
- Ensure the **Status filter** (upper right) includes "**All**" to capture patients
- Enter patient's name in the Find field (right side) and click on the names
- System will show the Case Management top header
- Click on Attachments (left task bar)
- Here you will find folders for sent/received **External Documents** (clinicals uploaded to CSI) or **Marketplace Documents** (Auth approvals that were faxed or emailed to your agency)
- Click to open a folder
- Upper right corner- locate the PDF file and double click to open document which can be printed

For an Authorization form to show in the marketplace document folder, the posted to processed referral must be completed in the client intake, marketplace list by your agency

Discharging a Patient of all Services

- Search and locate the patient under client list
- **Click on the 3 … dots (Upper Right side), a window will open label Add Status, click to open**
    - Enter effective date
    - Status tab will pop up, click on discharge
    - Reason for discharge
    - Click on save
    - All services under that patient will be discharged
- The discharge date cannot be prior to the process date of the service line in marketplace

CSI will capture your discharge from a report to update our system

Reactivating A Patient

If a patient comes back on services and already exists in the AlayaCare system

- Search for the patient and select under client list
- **Click on the 3 … dots (Upper Right side), a window will open label Add Status, click to open**
    - Enter effective date
    - Select ACTIVE
    - Click on save
- Go to **Client Form** and follow the process for **CSI New Referral Request**, previous services will not reactivate
    - Under **Case Management**
    - Client form; add the **CSI New referral Request**
    - Any patient not listed on the AlayaCare portal will need to be entered as a New Client and a New Referral Request form will need to be submitted.

View Existing Authorization on a patient in the accounting section

Once a referral has been completed by CSI and processed by your agency from Posted to Processed you are now able to view authorizations within the accounting section on the portal

- Click the "**Client**" (task bar left side)
- Click the "**Client list**" under the task bar (top of the page)
- Ensure the **Status filter** (upper right) includes "**All**" to capture patients
- Enter patient's name in the Find field (right side) or click on the patients
- Defaults to Care Management
- Click on **Accounting**, defaults to authorization service auth, start & ends date, visit amount
- Click on the report icon on the upper right side to select date period to see patients' usage
- The Table settings can also be changed by clicking on the three dots to alter how the report appears
- Click on the view button on the left to see more details. **No changes can be made here**.

If additional authorization is needed for existing services or a new service needs to be added, please complete the Patient Additional Authorization Request form located under the +clients forms

AlayaCare Authorization Dashboard

Utilize this feature to track expiring AUTH'S and current AUTH's in place

- Click on the **Dashboard icon** (upper task bar on left side)
- Click on **Data Exploration** (upper task bar)
- Click on **Agency**, second box will pop-up, click on AUTH'S
- This report can be filtered by clicking on the drop-down under Auth period or customize to your agency needs
- Report can also be filtered to include all patients or from the drop-down select
- Report has two sections top is current AUTH'S and bottom AUTH'S Expired or will within 14 days
- This report can be altered by hovering over the three dots on any header

- To download click on the three dots and select download data, select the format in Excel spreadsheet or CVS to select filters