Agency Referrals for CSI

This is a training Manual on how to utilize AlayaCare to submit referrals and manage authorizations for CSI Network Services.

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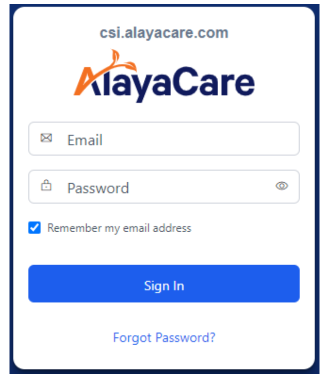
Logging into AlayaCare

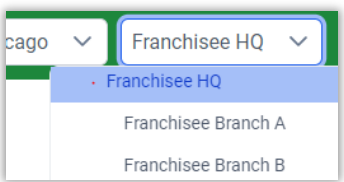
- This can only be done after your user account has been created by an Admin.
- Log in using the following link: csi.alayacare.com
- Username: your email address.
- Password: First time login, use the "Forgot Password?" link to set your password.
- You will receive an email to reset your password.
-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



Select appropriate agency (if applicable)

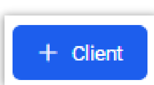
If you are an Agency who has multiple locations and has access to all of the locations, ensure you are selecting the appropriate agency location.

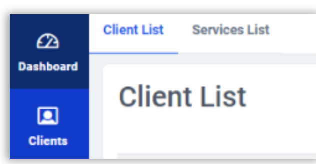
- Select the appropriate agency in the upper right corner.
    - For example: "Franchisee HQ" is the Parent agency, ensure you are selecting the appropriate branch (ie. either Branch A or Branch B) before creating a client and submitting the referral request. **Do not create patients under the PARENT account**.



Initiate Referral (create new patient)

- Ensure to select the appropriate agency in the upper right corner (if applicable).
- Click the "**Clients**" icon on the left side of the screen.
    - The default page "Client List" will appear.
- Click "**+ Client**."





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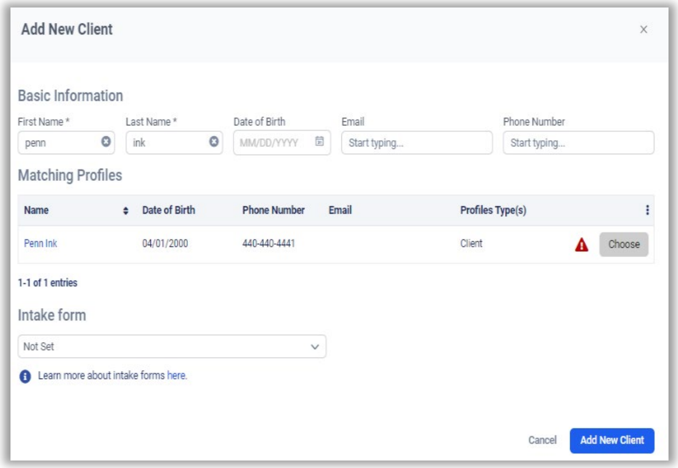
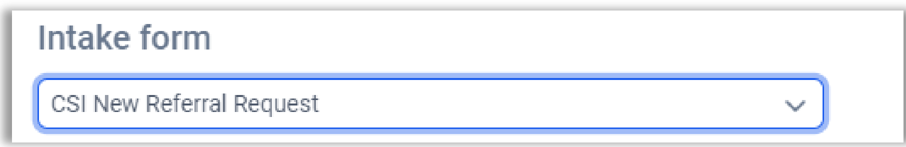
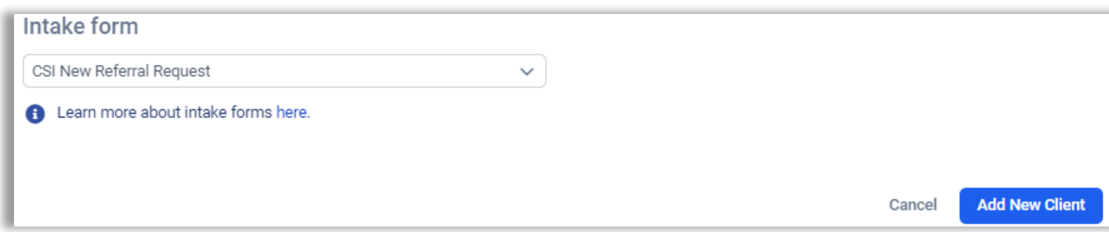
- Enter Required fields (marked with *).
  - First Name.
  - Last Name.
  - Date of Birth (not required, but helpful if common name to prevent creating duplicate patients).
  - **NOTE**: If there is a matching profile, that means the patient already exists. Click Cancel and skip to step: "Initiate Additional Authorization Request."



- If there are no matching profiles, go to the "**Intake form**" section of the screen. Do NOT click Add New Client at this point yet.
- Click the dropdown and select "**CSI New Referral Request**." (DON'T FORGET THIS STEP).



- Click "**Add New Client**"

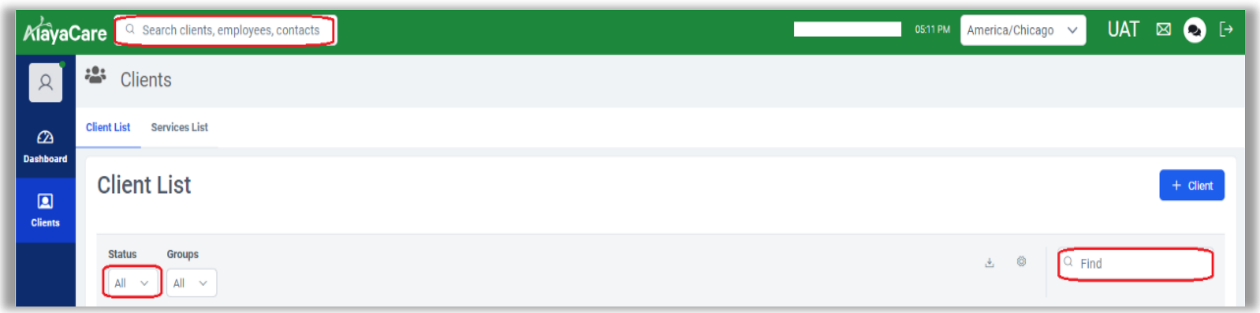


- You will now be directed to complete a form: "**CSI New Referral Request**."
- **NOTE**: If the form does not open to be completed, you may have forgotten to select the form before clicking Add New Client. Please follow the instructions on how to Manually add the CSI New Referral Request form in the next step.

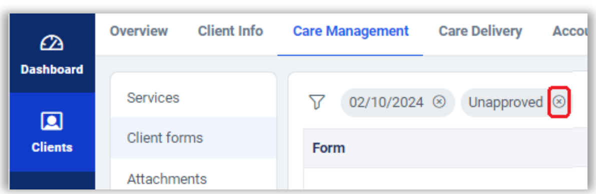
Manually adding the “CSI New Referral Request” form

Do.this.step.if.only.you.forgot.to.select.the.CSI.New.Referral.Request.Form.in.the.previous. step

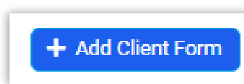
- Click the “**Clients**” icon on the left side of the screen.
    - The default page “Client List” will appear.
- Search for the patient in the top master search field (on any screen) or while in the Client List screen there’s a search field on the right.
    - Type in any order with no comma. First Name Last Name or Last Name First Name. You can also search by just Last Name and select from the list.
    - Ensure the Status filter includes “**All**” so that if the patient is Pending or Active it will produce results.



- Select the patient by clicking on any part of their name (it appears as a blue hyperlink).
- The **Care Management** tab will be the default screen when it first opens.
- Click on **Client Forms** to view/add form(s).
    - In this screen you can view existing forms, when available, by removing the “Unapproved” and Date filter (click the X).



- Click on the “**+ Add Client Form**” button on the right.



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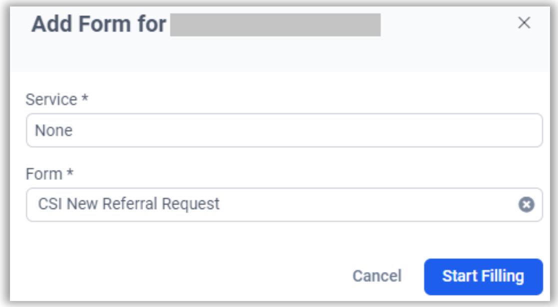
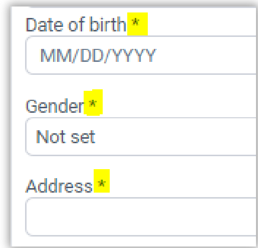
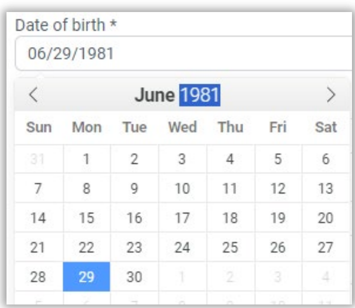
- Service is defaulted to “**None**.”
- Select the Form: **CSI New Referral Request.**
- Click “**Start Filling**.”



Completing the “CSI New Referral Request” form

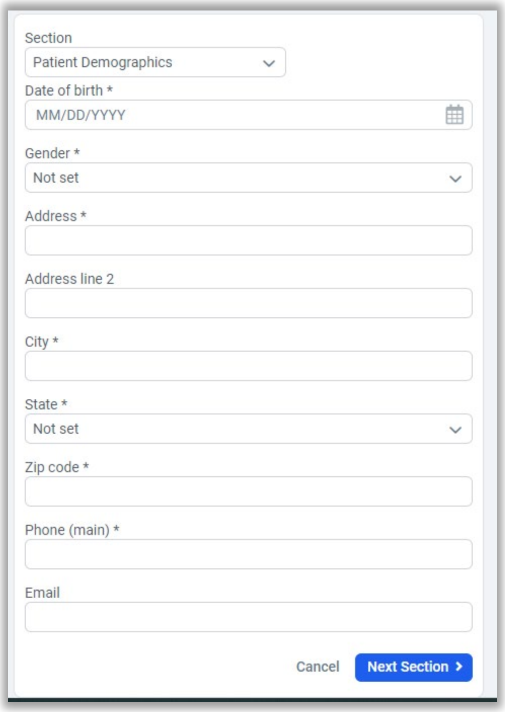


- Required fields are displayed with an asterisk (*) and the form cannot be submitted without those fields completed.
- Complete all required fields. Provide as much data as possible even when answering the non-required fields.
- Click “**Next Section**” to get to the next page, or “**Previous Section**” to navigate between pages of the form.
- **TIP**: When entering DOB’s (or any date field) click on the year and type in the year you need. 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.



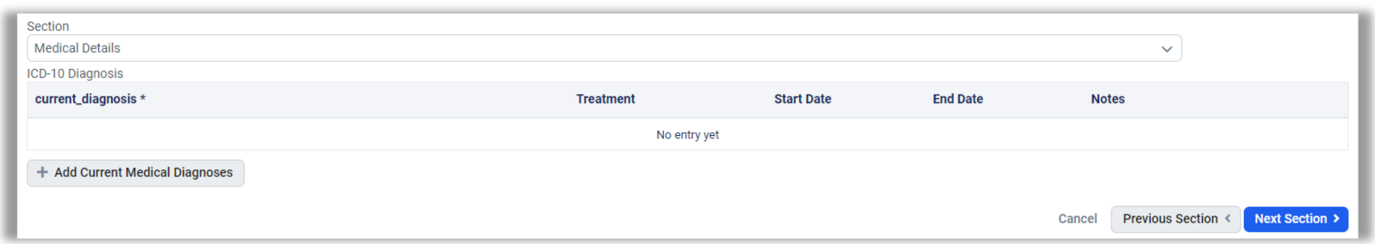
Here are screenshots of each section of the form:

- ➢ **Patient Demographics:** Complete all required fields, then click Next Section.



- ➢ **Medical Details (Diagnosis):**

- Click “**Add Current Medical Diagnoses**.”



- Start typing a keyword of the diagnosis, then select from the dropdown of choices.
- Once you see the formatting on how the diagnosis code is listed, you may need to enter more information to narrow down the selection as there are only seven results that will populate.
- You can enter the ICD-10 code without the period if you know it. For example, enter L03032 instead of L03.032.

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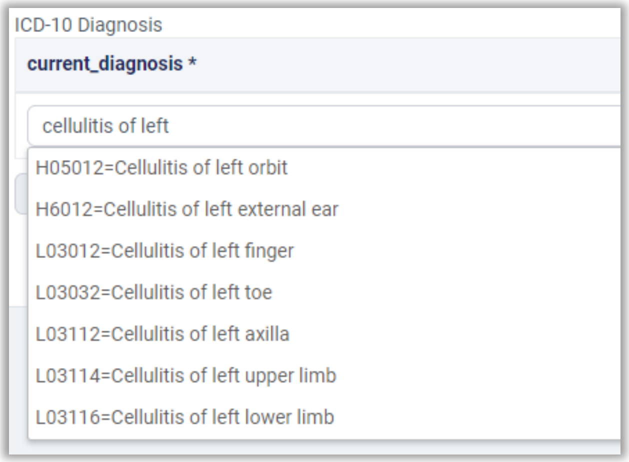
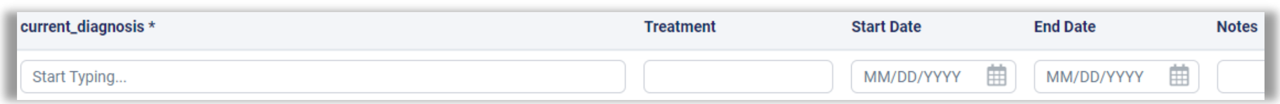
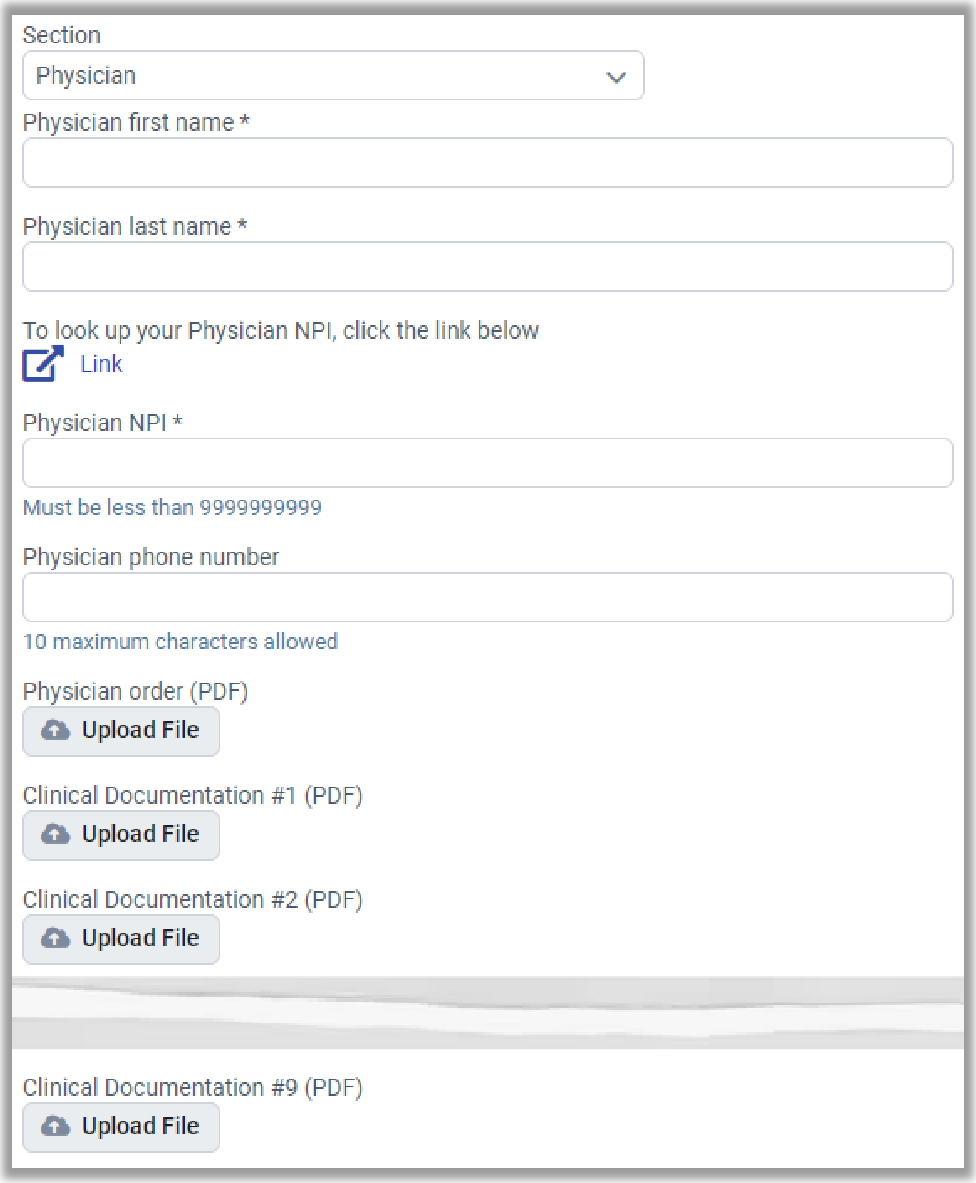


- Complete as many details as possible.
- If Start Date of diagnosis is unknown, enter patients start of care date.



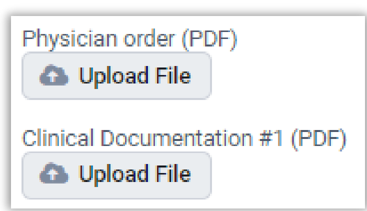
- If the patient has more than one diagnosis, click "**Add current Medical Diagnoses**" for each diagnosis the patient has.
- Click Next Section when all diagnoses have been entered.

➢ **Physician:** Complete all required fields.



Section
Physician
Physician first name *
Physician last name *
To look up your Physician NPI, click the link below
Link
Physician NPI *
Must be less than 9999999999
Physician phone number
10 maximum characters allowed
Physician order (PDF)
Upload File
Clinical Documentation #1 (PDF)
Upload File
Clinical Documentation #2 (PDF)
Upload File
Clinical Documentation #9 (PDF)
Upload File

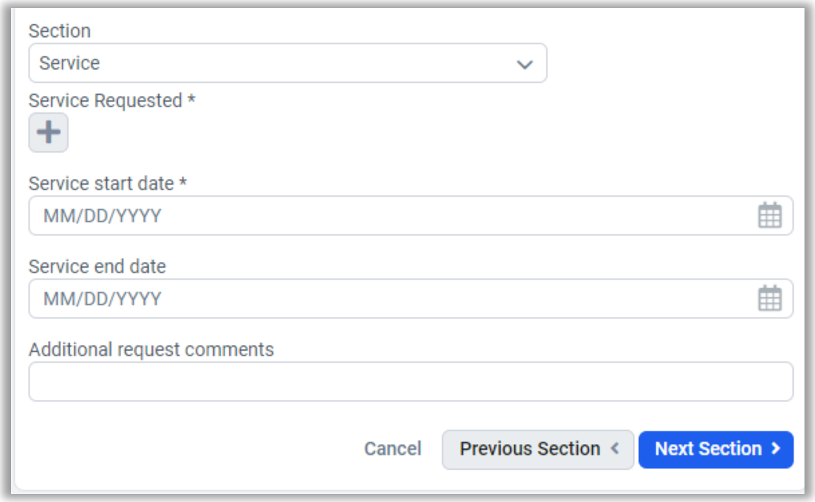
- Uploading documents (Physician order and other Clinical Documentation):
    - Must be a PDF document.
    - No special characters in the file name, the upload will fail, and the form cannot be submitted.
    - Only 1 PDF document can be uploaded per 'upload file' line.
    - There are ten total upload lines available to upload documents.



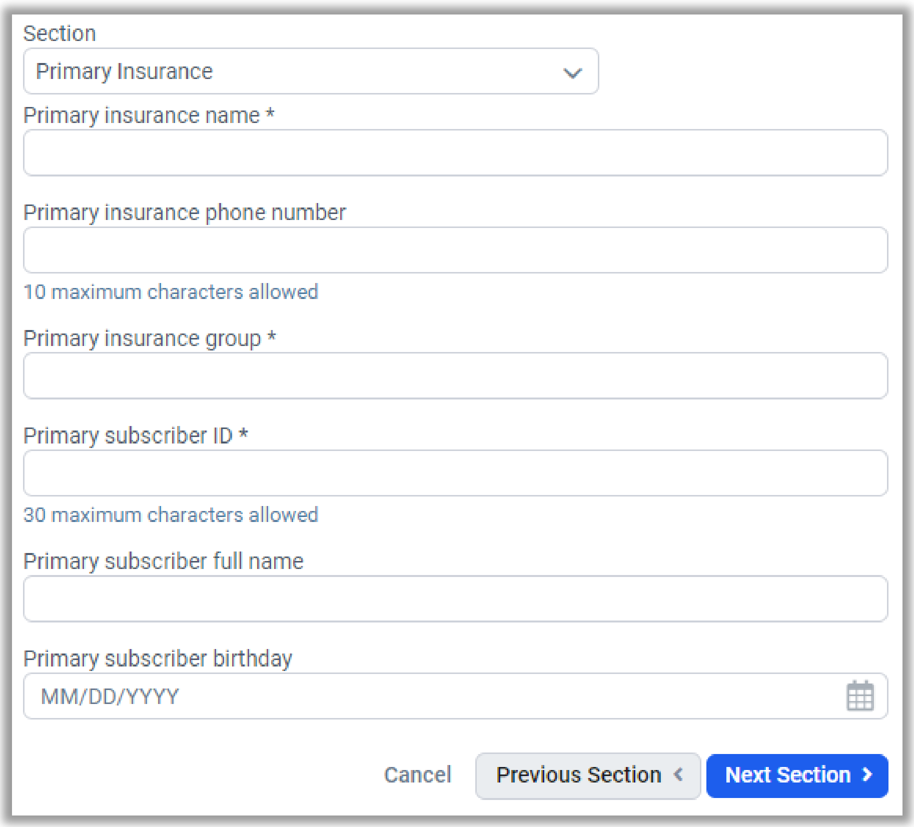
Physician order (PDF)
Upload File
Clinical Documentation #1 (PDF)
Upload File

➢ **Service:** Click the **+** to select the services needed. Select one or multiple as needed.

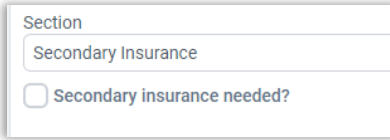
- Click Next Section when all required fields are complete.



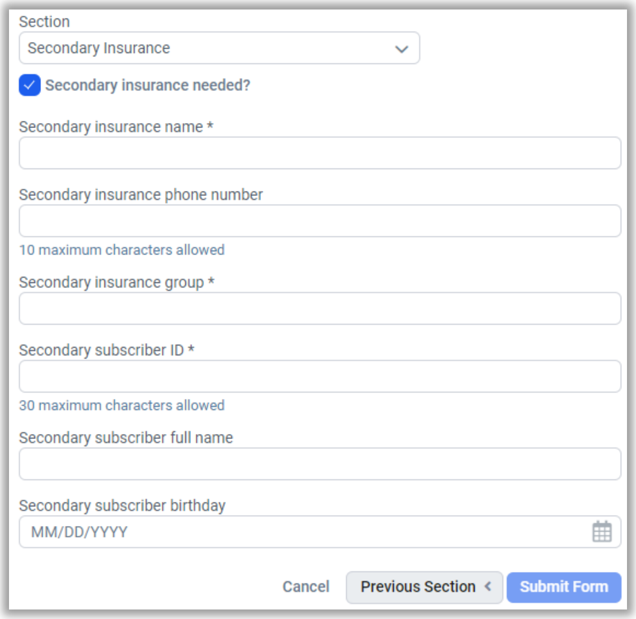
- **Primary Insurance:** Complete all required fields.
  - Click Next Section when all required fields are complete.



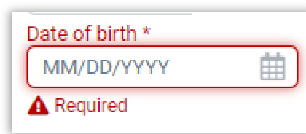
➢ **Secondary Insurance**: Check the box if you have the patients' Secondary Insurance. If the information is not available, do not check the box, click "**Submit Form**."



- If Secondary Insurance box is checked, complete the required fields with the Secondary insurance info.



- Once all fields have been entered, click "**Submit Form**."
  - If any required fields were missed, it will take you back to those fields highlighted in red to complete.



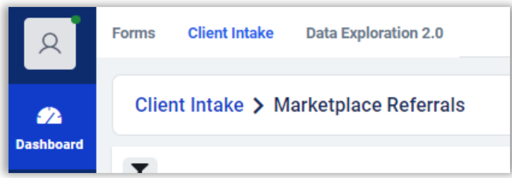
- The form will appear on screen after it has been submitted.
- The form will show as approved, but this does not mean the services are authorized at this time, this is just the system status of the form.
- Once the form has been submitted no further changes can be made, you will need to call CSI to make them aware of any changes. Contact the CSI Intake group at 440.717.1700 option 1, then option 2.
  NOTE: New referral request form can be used for benefit check only, in comment section type BENFIT CHECK ONLY all required fields must be completed. Once the case is accepted, use the patient additional auth request form to request your auth.

CSI will acknowledge the referral received and get the patient processed and request an auth from the payor. Requests will be processed within 24-48 hours. It may take longer to obtain the authorization.

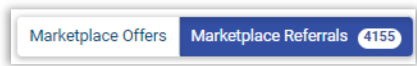
Process Referrals

Once you see referrals have been "**Posted**" this means the services have been authorized. The Purpose of processing the referrals will make the patient status Active and Authorizations can be viewed on the Authorization Dashboard within Data Exploration.

- Ensure to select the appropriate agency in the upper right corner (if applicable)
- Click the "**Dashboard**" icon on the left side of the screen.
- Click "**Client Intake**" on the menu header above.

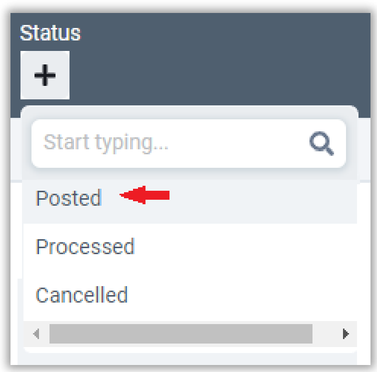


- Click "**Marketplace Referrals**" on the right side of the screen.
    - **Note**: Marketplace Offers is not applicable for this process, you will not find any data here.



    - click the X on the dates to clear them out.
      Then use the Search field to search by patient name.

- Utilize the "Status" filter to view "Posted" referrals. These are the referrals that need to be processed. The referrals with a "Processed" status are ones that have already been processed.



- Identify the referral(s) that need to be processed.
- If you have requested multiple services, **there will be 1 line for each service that needs to be processed. Be sure to process all of them.**

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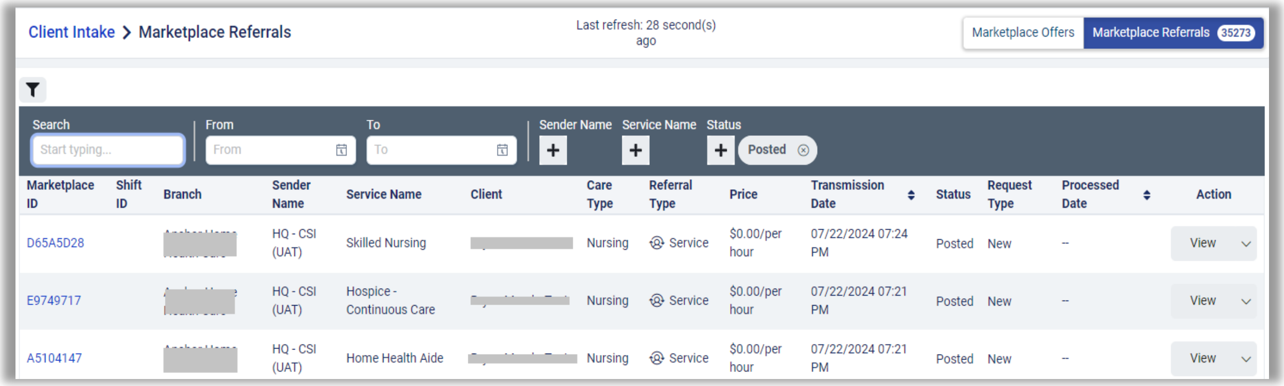
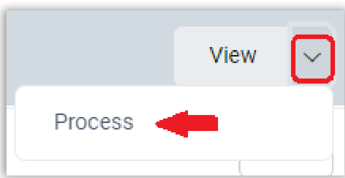


- Click on the down arrow next to the View button.
- Select "**Process**."



- **NOTE:** The system will find matching patients on your client list with the same name and DOB to associate the service lines with.
- Do NOT click "+ New Client and Service" at this point, otherwise you will create a duplicate patient.

- Click "**+ New Service**" which will add the service as identified under Service Name from the previous screen. Do NOT click 'Choose' on any of the Services (If you have processed multiple services, you will see the other services you have already processed).

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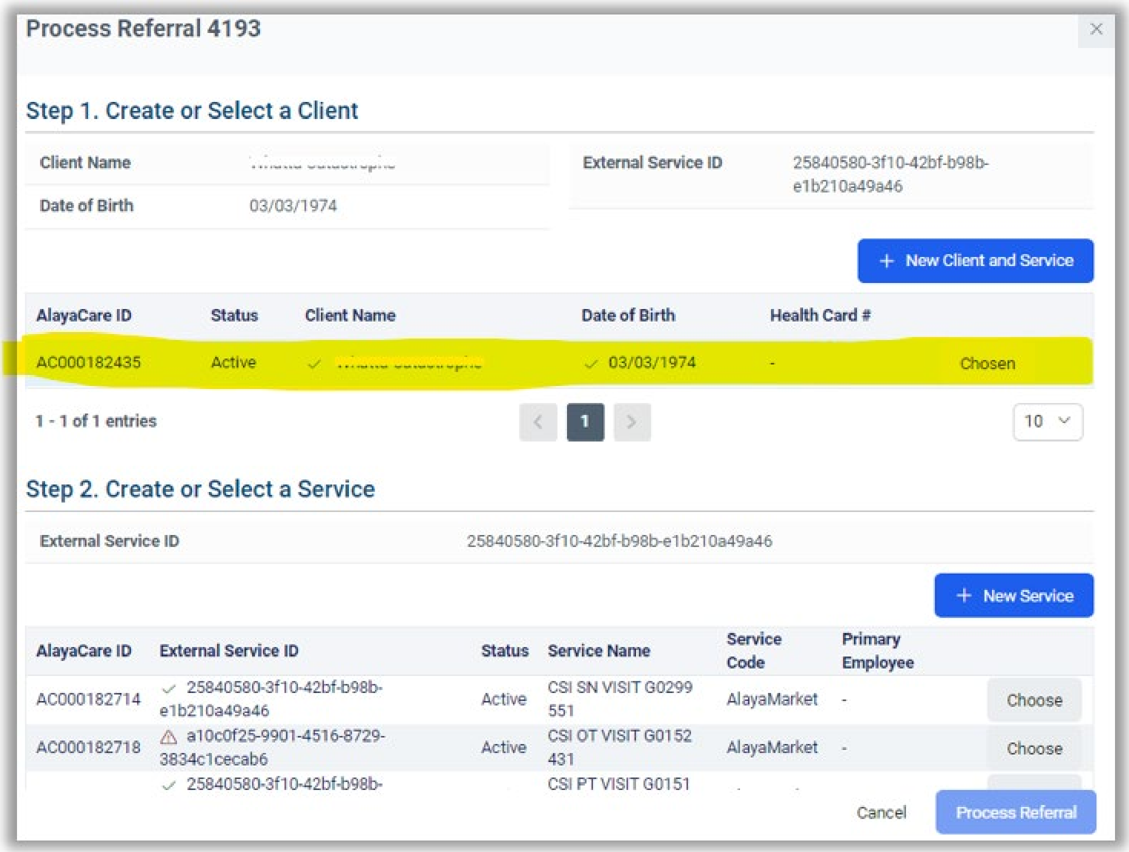
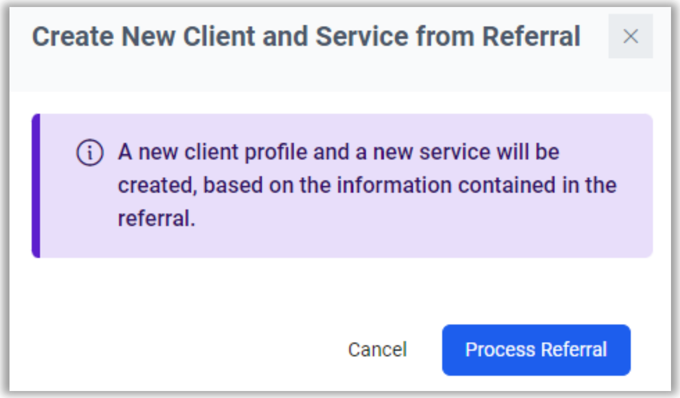


- This process will add the service to the patient on your client list and make the patient active.
- **NOTE**: If no matching patient is found, you will need to click + New Client and Service to create the patient. Only do this one time for the first service line. For all other service lines, click + New Service. (This applies to Carelon patients).

- There will be a confirmation screen that opens:



- Click "**Process Referral**."

- You will see the status of the referrals will change from Posted to Processed (you may need to update the filters to show Processed status).

Transmission Date	Status	Request Type	Processed Date	Action
07/22/2024 07:24 PM	Processed	New	07/23/2024 12:33 PM	View
07/22/2024 07:21 PM	Processed	New	07/23/2024 12:33 PM	View

Note if you do not process all referrals that are posted you will not see the Authorizations in the accounting tab or any attachments within.

Initiate Additional Authorization Request

The purpose of this form is to request additional authorizations or add a new service(s) on an **existing** patient.

- Ensure to select the appropriate agency in the upper right corner (if applicable)
- Click the "**Clients**" icon on the left side of the screen.
  - The default page "**Client List**" will appear.

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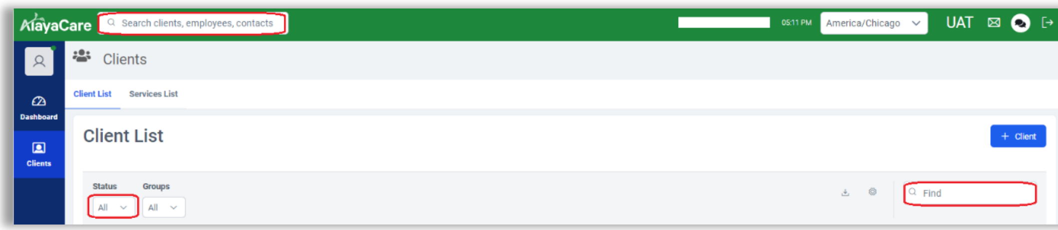
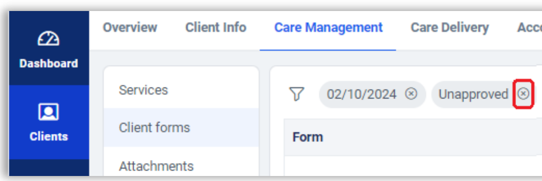
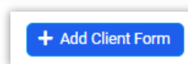
- Search for the patient in the top master search field (on any screen) or while in the Client List screen there is a search field on the right.
    - Type in any order with no comma. First Name Last Name or Last Name First Name. You can also search by just Last Name and select from the list.
    - Ensure the Status filter includes ‘All’ so that if the patient is Pending or Active it will produce results.
    - If the patient is discharged, you will want to reactivate the patient at some point, refer to the steps further in the document named “Reactivating a patient.”

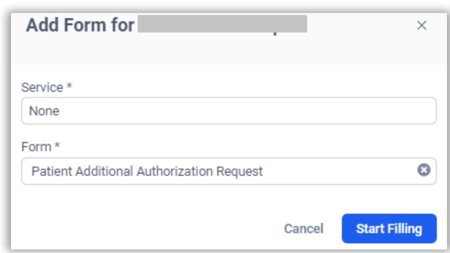


- Select the patient by clicking on any part of their name.
- The **Care Management** tab will be the default screen when it first opens.
- Click on **Client Forms** to view/add form(s).
    - In this screen you can view existing forms, when available, by removing the “**Unapproved**” filter (click the X).

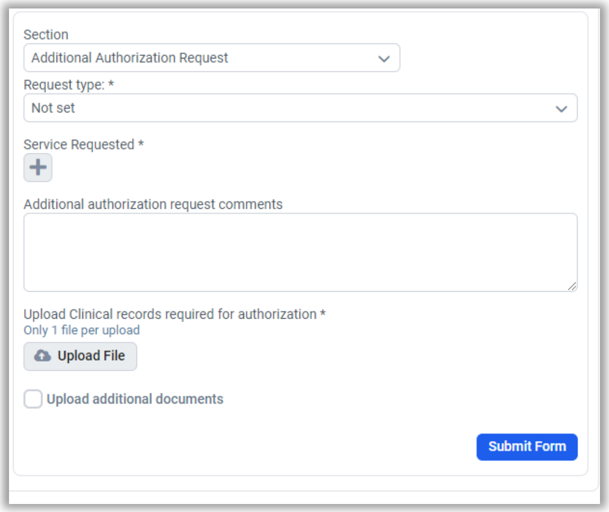


- Click on the “**+ Add Client Form**” button on the right.
- Service is defaulted to “**None**.”
- Select the Form: **Patient Additional Authorization Request.**
- Click “**Start Filling**.”

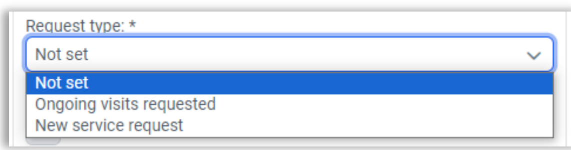




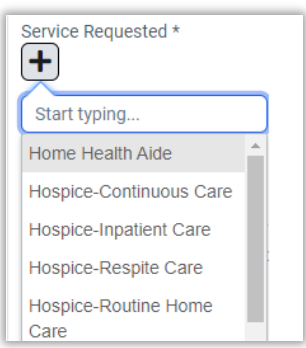
- Required fields are displayed with an asterisk (*) and the form cannot be submitted without those fields completed.
- Provide as much data as possible when answering the non-required fields. This is a short form, see screenshot below.



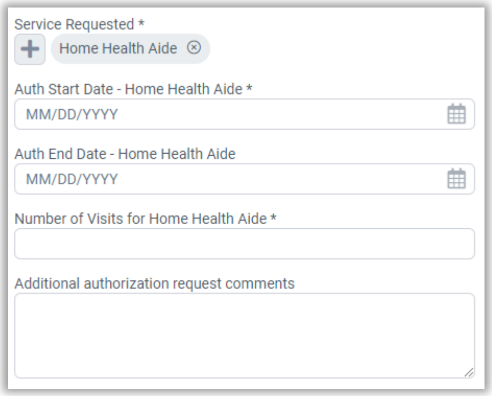
- **Request type**: Select either Ongoing visits requested or New service request.
  - **Ongoing visits requested**: use this when you have an existing service that needs to have the authorization extended or updated.
  - **New service request**: use this when you have need to request an auth for a new service.



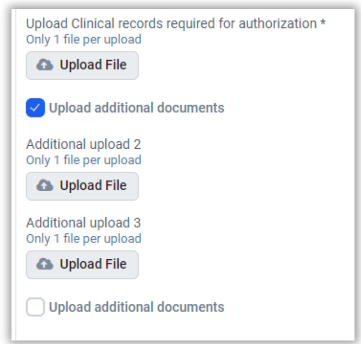
- **Service Requested**: Select one or multiple services as needed.



- Once a service(s) is selected, complete the next set of questions.

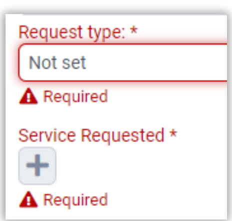


- Uploading documents (Physician order or other Clinical Documentation):
  - Must be a PDF document.
  - No special characters in the file name, the upload will fail, and the form cannot be submitted.
  - Only 1 PDF document can be uploaded per ‘upload file’ line.
  - There are 9 possible upload lines available to upload documents.
  - At least 1 document should be uploaded.
  - Check the “Upload additional documents” box for more upload slots when needed.



- Once all fields have been entered, click “**Submit Form**.”

- If any required fields were missed, it will take you back to those fields highlighted in red to complete.



- The completed form will appear on screen after it has been submitted.
- Once the form has been submitted no further changes can be made, you will need to call CSI to make them aware of any changes. Contact the CSI Authorization group at 440.717.1700 option 1, then option 2.

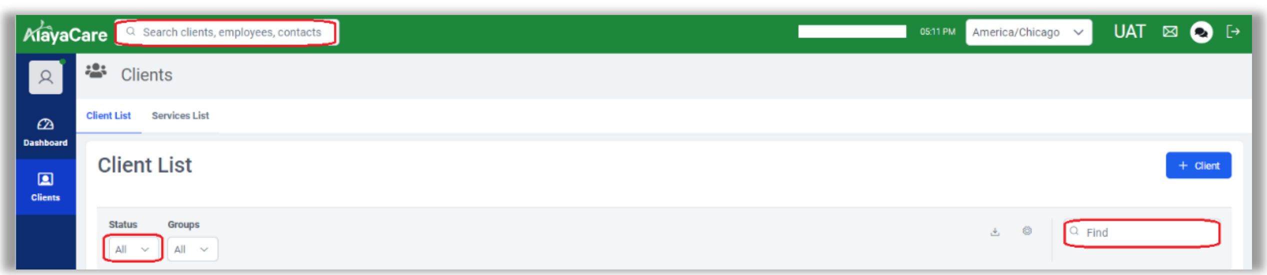
The CSI team will process the Patient Additional Authorization Request form. Depending on what was requested, it may take a couple of days to obtain the auth.

- If requesting an authorization on an existing service, the authorization will be updated on the Accounting/Authorizations tab within the patient profile.
- If requesting additional services, these will appear on the Marketplace Referrals tab on the Dashboard.
    - These would be processed the same as the services were initially requested.
    - Refer back to the "**Process Referrals**" steps listed earlier in this document.

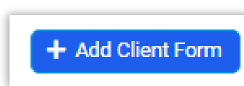
Submitting a "Mail Message" form

The purpose of this form is to be a way of communicating to the CSI team after the above steps have been completed. This form can be used to communicate any changes to the patient's demographics or insurance, submit additional documentation, etc.

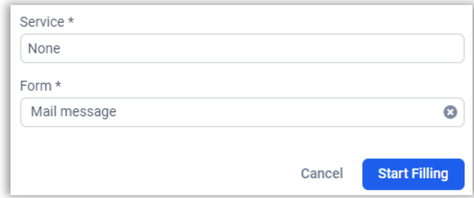
- Click the "**Clients**" icon on the left side of the screen.
    - The default page "**Client List**" will appear.
- Search for the patient in the search field while in the Client List screen there is a search field on the right.
    - Type in any order with no comma. First Name Last Name or Last Name First Name. You can also search by just Last Name and select from the list.
    - Ensure the Status filter includes 'All' so that if the patient is Pending or Active it will produce results.
- Select the patient by clicking on any part of their name.



- The **Care Management** tab will be the default screen when it first opens.
- Click on **Client Forms** to view/add form(s).
- Click on the "**+ Add Client Form**" button on the right.

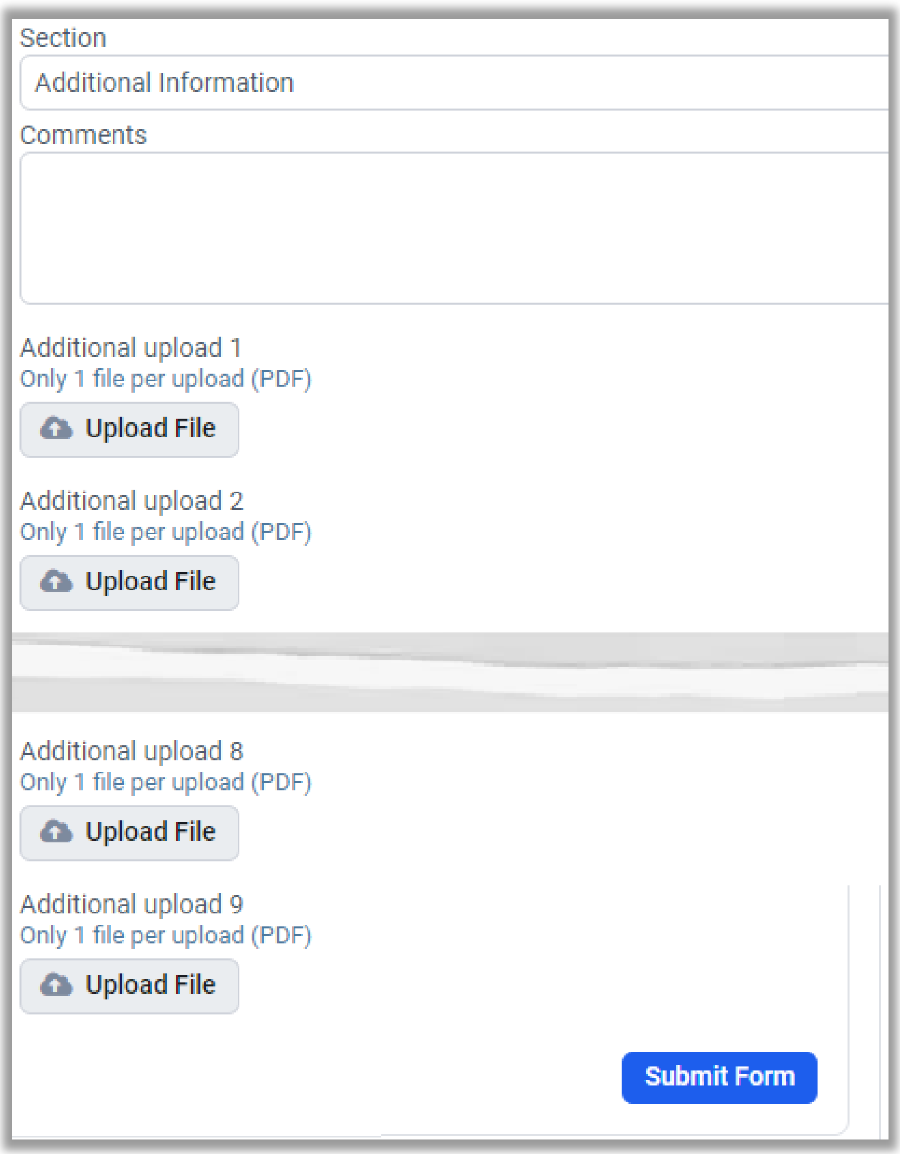


- Service is defaulted to "**None**."
- Select the Form: **Mail Message.**
- Click "**Start Filling**."



Below is a screenshot of the form

- Add comments as needed to communicate to CSI.
- Upload files as needed. There are 9 upload lines available.

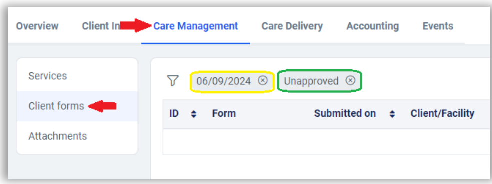


Agency Referrals for CSI

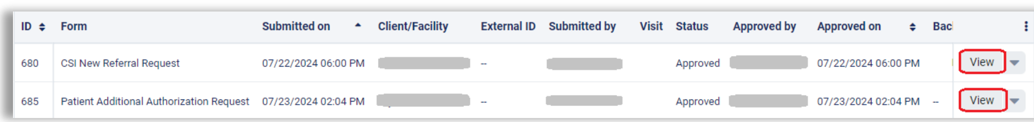
View Submitted Forms

This is where you will find all the forms you have submitted for the patient.

- View Client forms.
  - Navigate to the Client Profile (Clients/Client List, search patient and select).
  - On the Care Management menu, click "Client forms" on the left.
  - Click the 'X' on the Unapproved and Date filter.



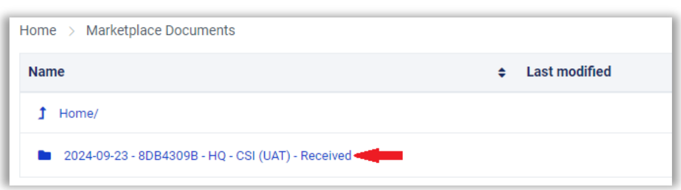
  - Click "**View**" to open the form and view what was requested within.
  - Changes cannot be made after the form has been submitted.



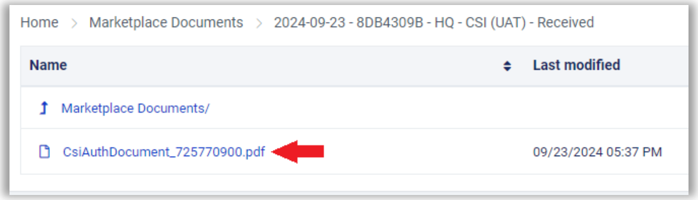
View/Find Attachments

This is where you will find the PDF document(s) that is generated after CSI has processed the referrals and received the authorizations or benefit information the agency has requested.

- View attachments
  - Navigate to the Client Profile (Clients/Client List, search patient and select).
  - On the Care Management menu, click "**Attachments**" on the bottom left.
  - Click on the folder "**Marketplace Documents**."
    - Here you will find a folder of "Received" documents. Click on that folder to find the PDF document.



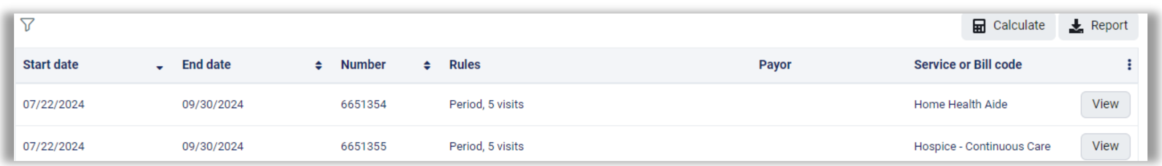
- Click to open the Received folder, you will see the PDF document, double click to open the PDF document.



Accounting/Authorizations Tab

You can review detailed authorization information received from CSI within the Client Profile.

- Utilize the search in the upper left corner or go to the Clients/Client List to search for your patient.
- Click on the "**Accounting**" tab.
- The default screen that appears is "**Authorizations**" (disregard the other options below it, these will not apply to you or any of these processes).
- Here you will see the authorizations for each of the services you requested.
- This screen will give you the Start & End date of the Auth, the Auth # and the 'Rules' indicate how many visits were authorized. Each line pertains to one specific service.

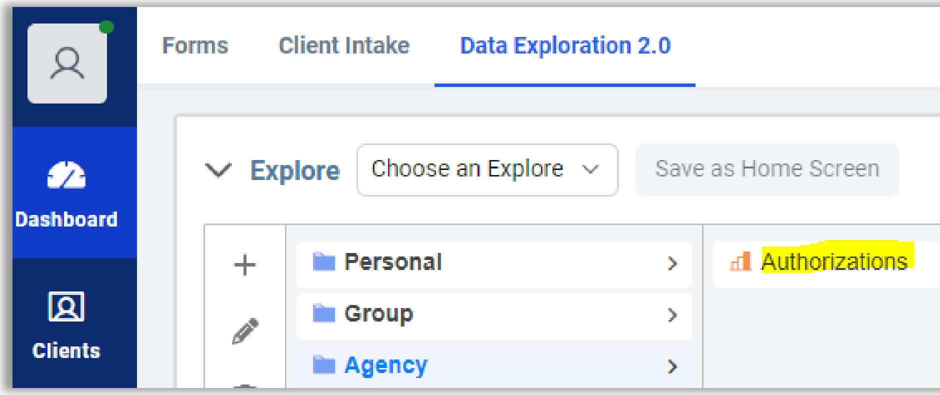


- Click on "**View**" to open the authorization for the specific service. The only additional field that does not appear on the previous screen is the "**Notes**" section.
- Please use the "Mail Message" form to provide additional information or "Patient Additional Authorization Request" forms to request a new authorization.

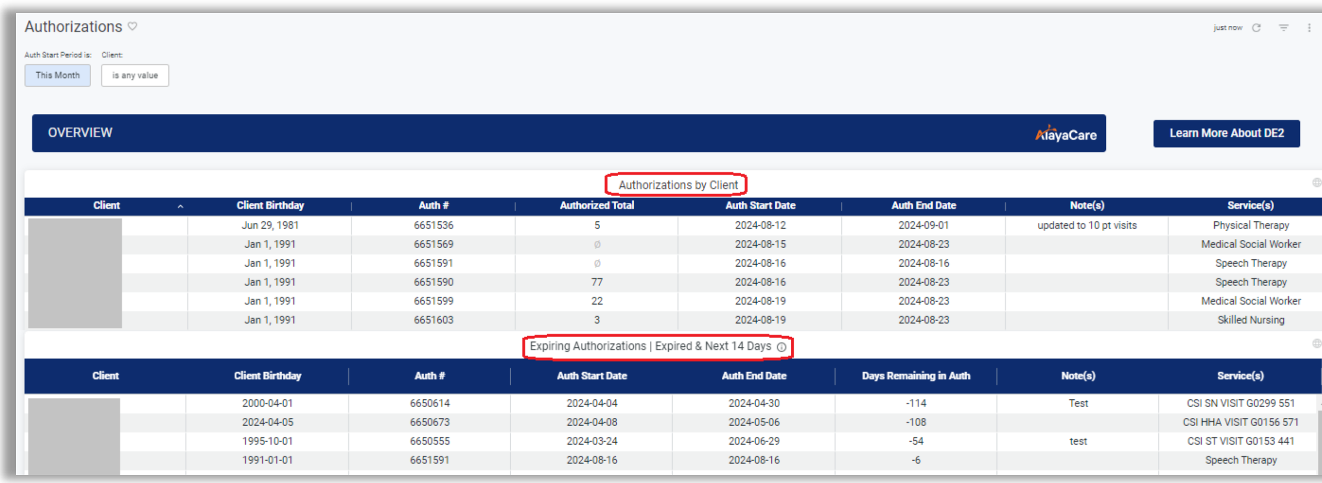
AlayaCare Authorization Dashboard

Utilize the Authorization Dashboard to track expiring authorizations and to view all authorizations on all of your patients vs. trying to see them one by one.

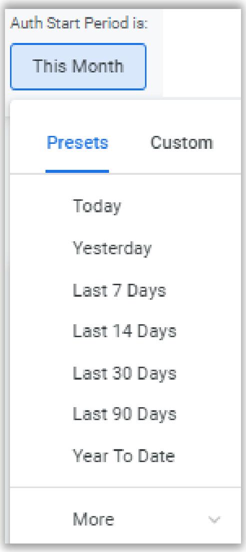
- From any screen, click on the **Dashboard** icon on the left, then click on **Data Exploration 2.0.**
- Click on the **Agency folder**, then click on **Authorizations.**



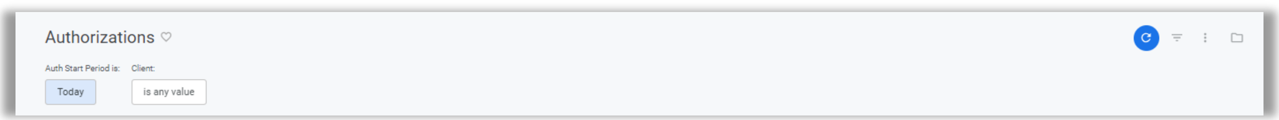
- You will then be presented with a dashboard that contains two sections:
  - **Authorizations by Client** – This dashboard shows all active patients with active authorizations.
  - **Expiring Authorizations | Expired & Next 14 days** – This dashboard shows active patients with authorizations that have expired and are going to expire within the next 14 days.



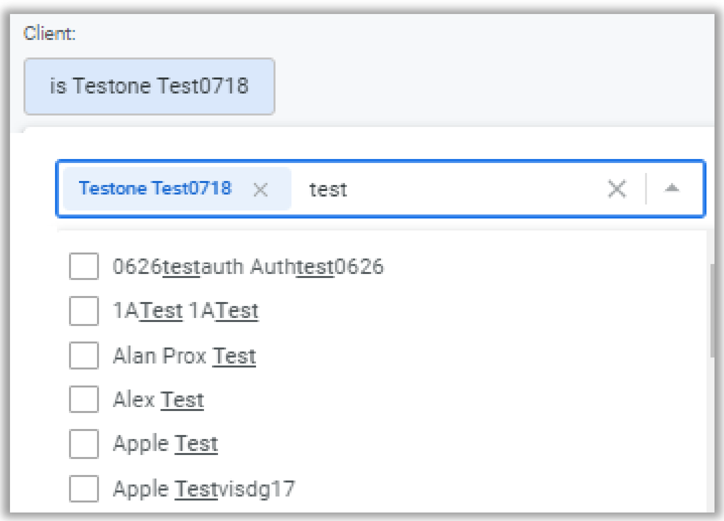
- Filtering by Auth Start Period and by Client (aka patient)
    - The “Auth Start Period is” filter only applies to the Authorizations by Client dashboard on the left side.
    - You have several options to select from, “This Month” is the default view:



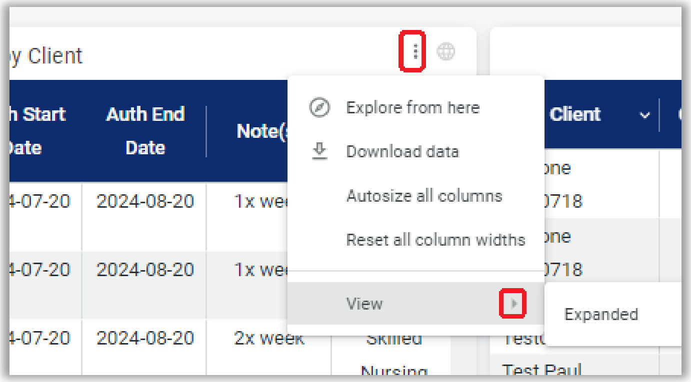
    - If you change any of the filters, you will need to click the refresh button at the top of the dashboard. It will be highlighted in blue anytime a refresh is needed.



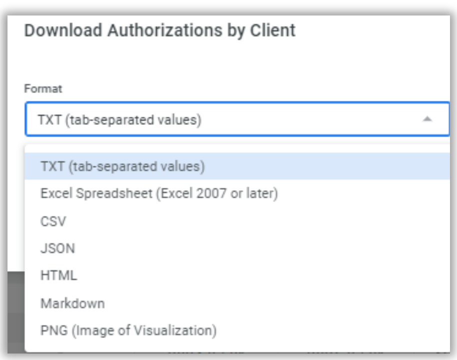
    - The “Client” filter will filter both dashboards at the same time.
    - You can filter by one or many clients as you would like. Click the box next to the client and you can type in a portion of the client’s name.



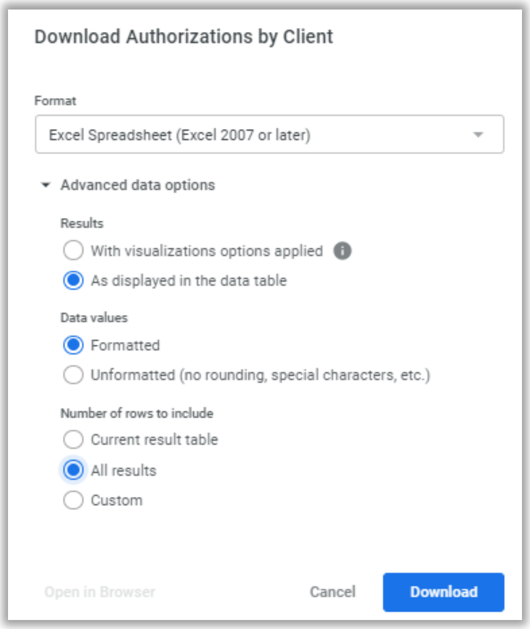
  - Click the refresh button when you are done with the filtering to apply new filters.
- Viewing the individual dashboards
  - If you hover over the header within the individual dashboards, you will have the three dots that you can click on for several different options.



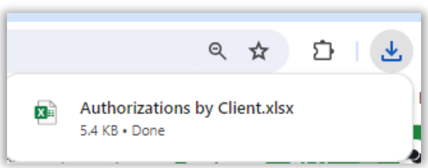
  - “Explore from here”-Not recommended to use. This will enable you to manipulate the dashboard (do not worry, you cannot save this within the agency folder). Unless you have had extensive experience with AlayaCare Data Exploration this is difficult to use. The fields that have already been provided should be enough data to work with.
  - “Download data”-you can download each dashboard to see an expanded view outside of AlayaCare. More information further down in this document about downloading.
  - “Autosize all columns”-this feature will change the size of the columns automatically, so each line is not wrapped.
  - “Reset all column widths”-if there was any manual sizing of any of the columns, it will rearrange to the default setting.
    - “View>Expanded”-Use this feature if you want to view the current dashboard in an expanded view. This will pop up an expanded window of the current dashboard for easier viewing.
- Downloading the data
  - Anywhere you see the three dots while hovering within any of the headers, click the three dots and click Download Data.



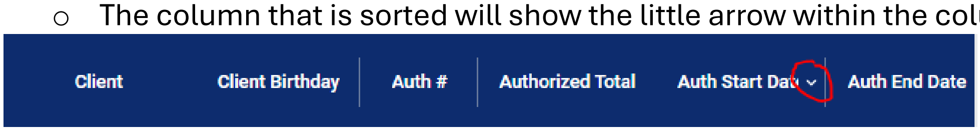
- Select the format in which you want our output to be. Recommended is the Excel Spreadsheet or CSV so that you can do your own filtering from there.
- Make the following selections in the Advanced Data Options.
  - Always select the "As displayed in the data table' option.
  - Leave the Data values as "Formatted." This option is already applied.
  - Always select "All results" so that you get all the results that were contained within your filters you set or the defaulted filters.



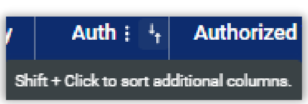
  - Lastly, click Download. This will appear in your downloads file or easily accessed in the upper right corner of your browser.



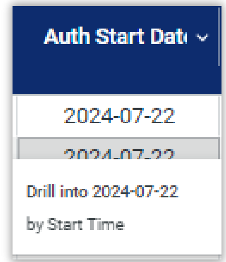
- Sorting by column
  - You can sort any of the columns by clicking on the arrows within the column when hovered by the mouse.
  - The column that is sorted will show the little arrow within the column.

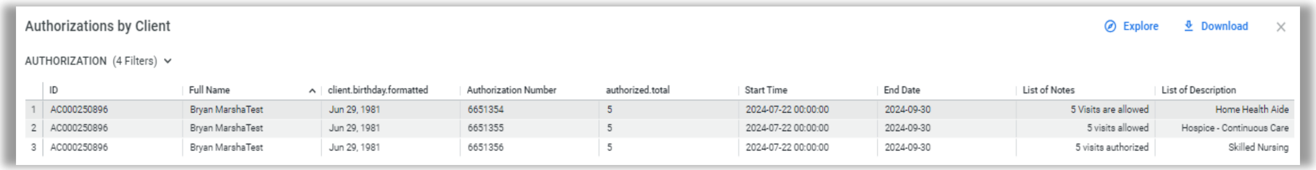


  - You can sort multiple columns by holding the Shift key and clicking on the additional column to be sorted.



- Drilling down on certain data fields within the dashboard.
    - You can click on a data set within the dashboard, for example, click on the date under the Auth Start Date and you can drill down by that date, meaning the report will now filter by data with just that Auth start date you have selected. Click on 'by Start Time' and another window will pop open with the data selected for that start date.
    - You can also download that data if needed.



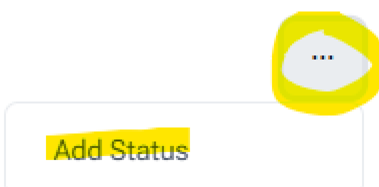


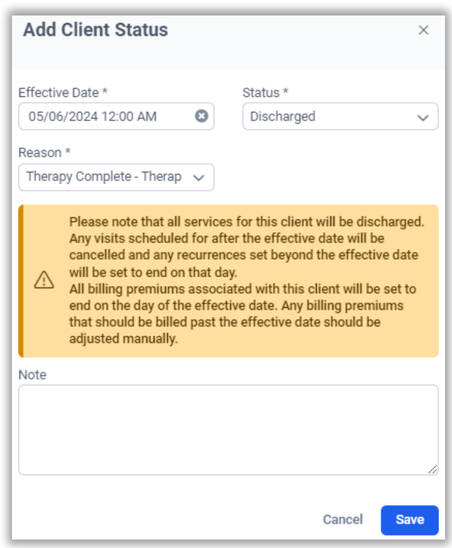
	ID	Full Name	client.birthday.formatted	Authorization Number	authorized.total	Start Time	End Date	List of Notes	List of Description
1	AC000250896	Bryan MarshaTest	Jun 29, 1981	6651354	5	2024-07-22 00:00:00	2024-09-30	5 Visits are allowed	Home Health Aide
2	AC000250896	Bryan MarshaTest	Jun 29, 1981	6651355	5	2024-07-22 00:00:00	2024-09-30	5 visits allowed	Hospice - Continuous Care
3	AC000250896	Bryan MarshaTest	Jun 29, 1981	6651356	5	2024-07-22 00:00:00	2024-09-30	5 visits authorized	Skilled Nursing

Discharging a Patient

You should discharge Patients as you find they no longer need services. When discharging a patient, all the active services will automatically be discharged. This will then remove the patients or expired/expiring authorizations as appropriate on the Authorization Dashboard upon the next data refresh (usually within 2 hours).

- Discharge the Patient
    - Search and select the patient.
    - Click the "..." in the upper right corner of the screen, and click "Add Status."



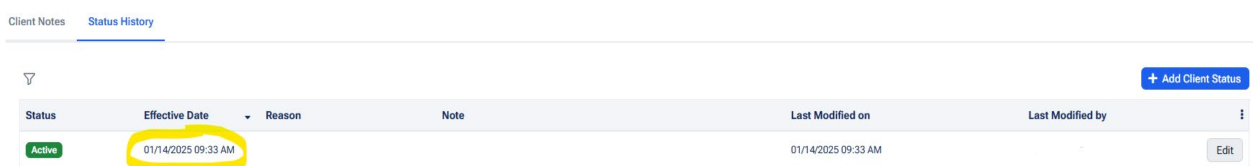


    - Enter an Effective Date.
    - Select "Discharged" (do not select any other status of Waiting List or On Hold).
    - Select appropriate Discharge Reason.
    - Add a note stating the Discharge date for the Patient.
    - Since we are not creating Visits or Billing thru the AlayaCare system, the only applicable alert in the

yellow box is "Please.note.that.all.services.for.this.client.will.be.discharged."

- Click "Save" to save the new discharged status.

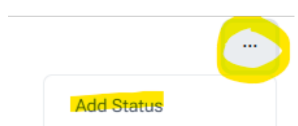
- **NOTE**: Be sure to check the effective date for the Patient. You can find this by going to the Patients account, the Overview tab, and scrolling to the bottom to the Status History. If you need to Discharge after the effective date, you should not have an issue selecting the Discharge date you need of your Client. If you need to select a date PRIOR to the effective date, AlayaCare will not allow you to make that selection. In this case, just choose a date, select discharged, and include the actual discharge date in the note, and hit save.

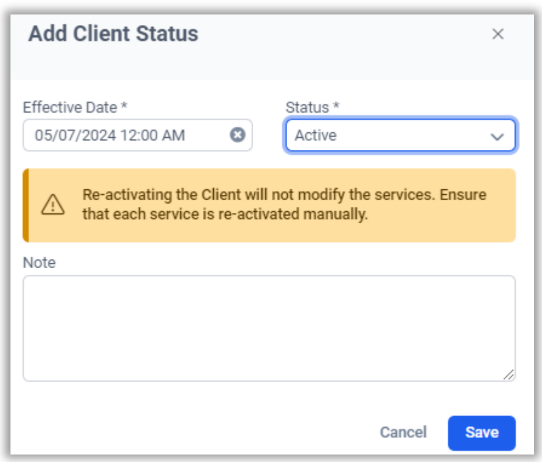


Reactivating a Patient

If a patient has come back on service and the patient already exists in the system, reactivate them with the steps below. This will not reactivate any previously discharged services. You will need to complete the CSI New Referral Request form.

- Search and select the patient.
- Click the "…" in the upper right corner of the screen and click "Add Status."
- Effective Date.
- Select "Active" status.
- The alert states that the services that were previously discharged will not be re-activated. You will not be reactivating the existing services; you will need to complete the CSI New Referral Request form.





- Adding a note is optional, this will be for your purpose only. The CSI team will not see the note.
- Click "Save" to update the status to Active.
- Please note that if you use a future date, it will reflect both status until the future date has arrived, then it will reflect Active.

If you just reactivated the patient, you would need to request new services to be added by completing the CSI New Referral Request form.

- Navigate to Care Management/Client forms.
- Select "+ Add Client Form."
- Select "None" from the Service drop down.
- Select the form: "CSI New Referral Request."
- Select "Start Filling"
- Refer to the section above **Completing the "CSI New Referral Request"** form for the remaining steps.