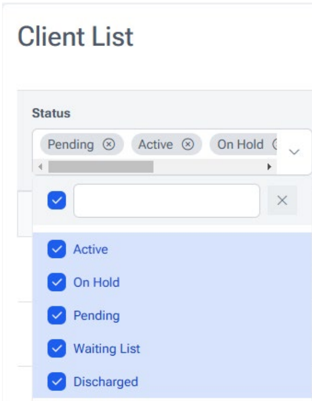
CSI AlayaCare Portal FAQ's

I am not finding my patient accounts on my client list

Be sure your filters are capturing the status of all options available you want to view



Why am I seeing duplicate patient accounts?

If you are part of an agency that has multiple locations, be sure you are in the correct location when submitting and new referral.

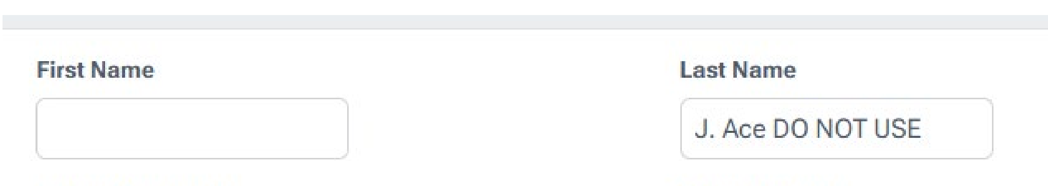
This could potentially happen if the service lines were not processed correctly. Be sure you are choosing + service when processing service lines for an already active account. If +client & +service option is chosen, it will create duplicate accounts.

Can I delete a duplicate account?

There is no way to delete a duplicate account. However, you can follow the steps below to "delete" the account, so it avoids confusion in the future.

First, you will want to change the status of the account to discharged, and adding in the note section "Duplicate account" and hit save.

Then, you will want to change the name of the patient's account. You will go to the Client Info tab within the patients' account, delete the first name out of the first name box, so it is completely blank. Then, put the first initial and last name in the last name box, and put "DO NOT USE" after the last name. So, for example, it should be J. Ace DO NOT USE. This will prevent any other users from requesting or submitting under the wrong account. But the account will still exist to see information within that patients account if necessary.

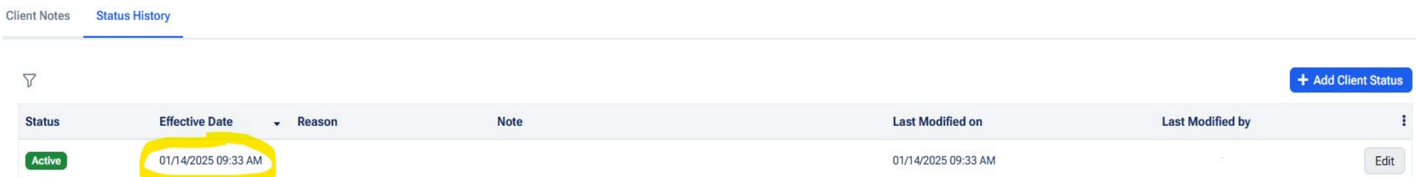


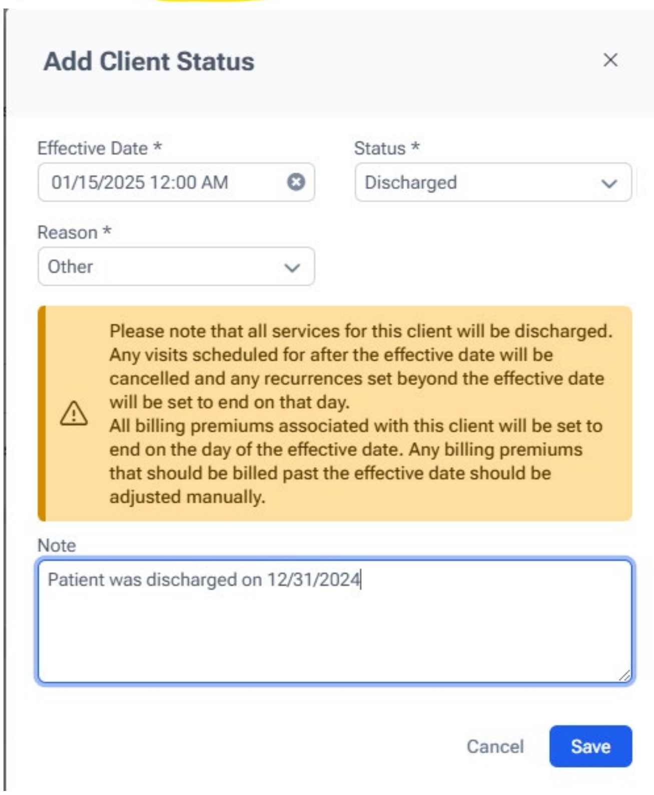
The system will not allow me to Discharge a case with the effective date I selected.

Be sure to check the effective date for the Patient. The effective date is when the patient was made Active when the Service Lines were processed. 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 <u>include the actual discharge date in the note, and hit save</u>.





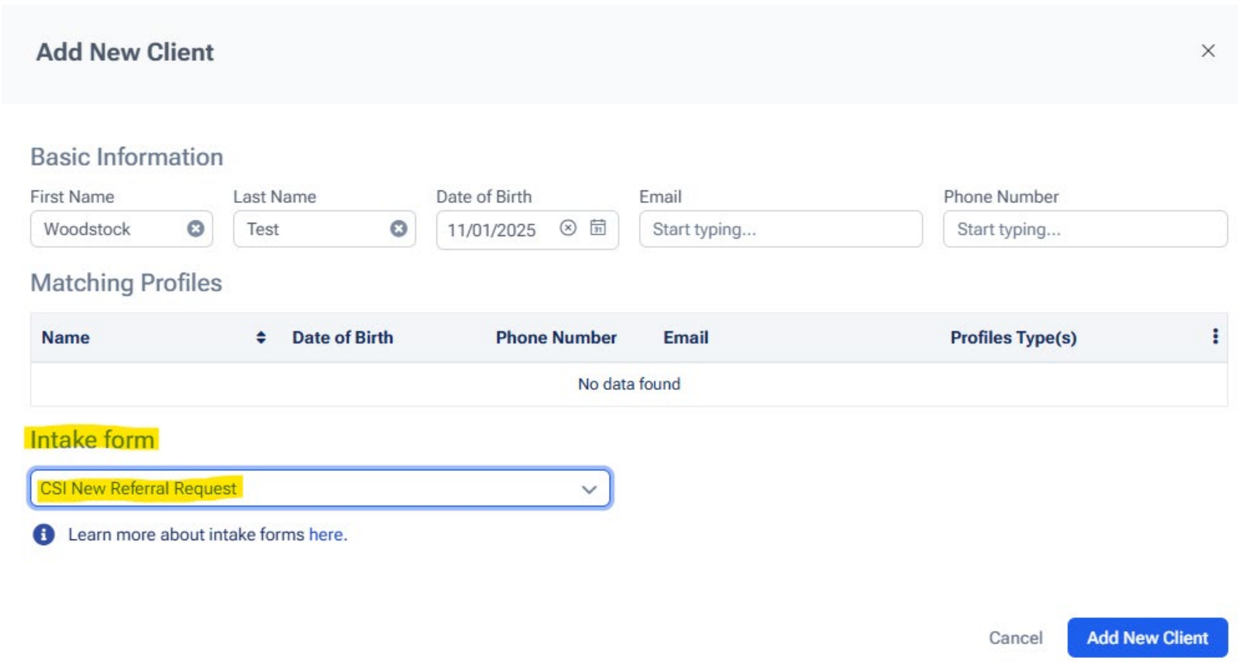
I am uploading documents under the attachment's sections in the client account, but CSI is not receiving them.

Remember you must submit a form to get anything needed by CSI. To send documents to CSI, you will search up the patient, go into the clients account, go to client forms, click **+**

client form, select the form Mail Message, complete the form, and upload documents, then click submit form.

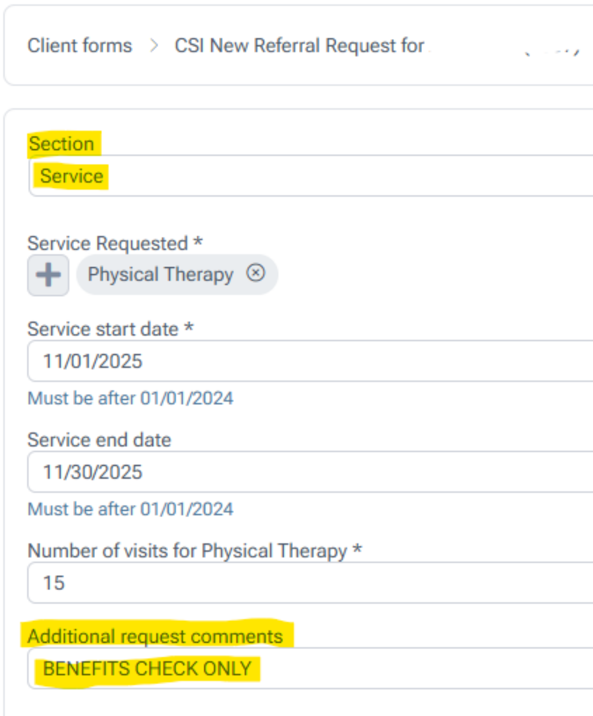
I am adding a new client, but no form is showing for me to populate the new referral information.

You must choose CSI New Referral Request under Intake Form when entering a new client, for the form to appear to populate.



I want to submit a Benefits Check to CSI, but I do not know how.

To submit a Benefits Check, you need to complete and submit a CSI New Referral Request, complete all required fields, and note in the **Service** section under the field, additional. request.comments **BENEFIT CHECK ONLY**. Once CSI processes the case and you receive the benefits back, use the Patient.Additional.Auth.Request form to request your auth.



Client forms > CSI New Referral Request for

Section

Service

Service Requested *

Physical Therapy

Service start date *

11/01/2025

Must be after 01/01/2024

Service end date

11/30/2025

Must be after 01/01/2024

Number of visits for Physical Therapy *

15

Additional request comments

BENEFITS CHECK ONLY

For Carelon (Aetna and Anthem) cases, we do not submit referrals through the CSI AlayaCare Portal. Will these be processed differently?

Yes, for any patient you do not submit as a new referral on the CSI AlayaCare Portal, they will not appear on your client list.

When you go to process the first service line in Marketplace Referrals, you will need to choose **+New Client and Service** in order to have the patient added to your client list. For all subsequent service lines, choose **+ New Service** to continue adding the service lines to the same client.

How long will it take to get the authorizations back to process in Marketplace?

Once your agency submits a form to CSI, we will work on your request just as we always have. There are no changes in timelines of receiving authorization from CSI. Once CSI has an update on the status, you will find the Posted services under Marketplace Referrals to be processed. Your agency will still receive email/faxes for when your authorization comes through from CSI.

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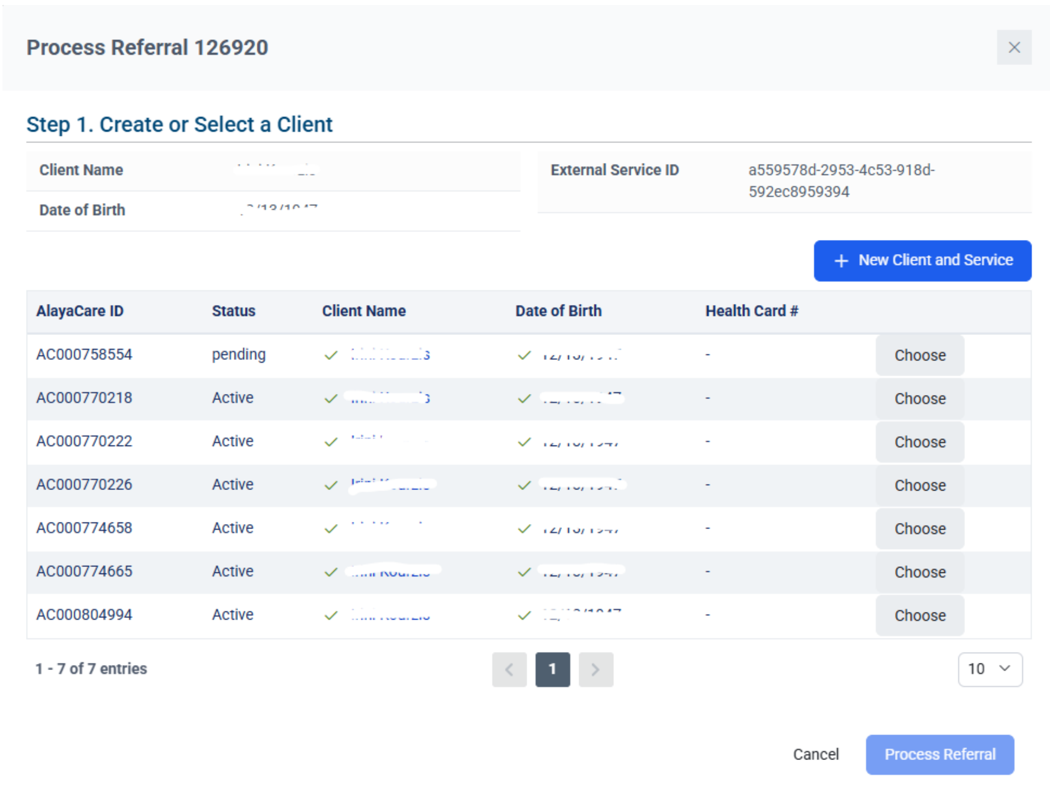
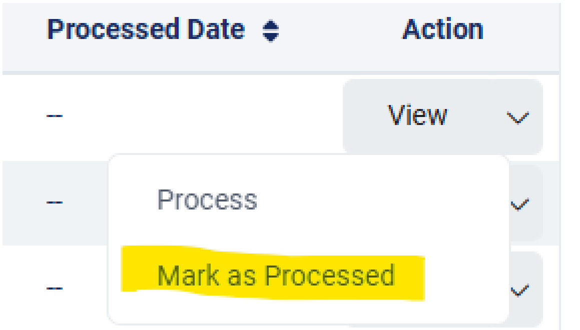
I am processing Service Lines under Marketplace Referrals, but multiple accounts are being shown.

If you go to Process Service Lines and there are multiple accounts that are populating, that means there are multiple accounts for that Patient on your Client List. (it would look like the image below).

In this case, you will need to Discharge all the duplicate accounts, only leaving one account standing. The steps on how to do that are located on Page 1.



I submitted a new referral, but my patient is a non-admit and I need to cancel.
Notify CSI via a Mail Message through the patients' account that the patient is a non-admit and the referral can be cancelled. In AlayaCare, change the status of the case from pending to discharged, you can add in your note patient is non-admit for your records. Under Marketplace Referrals, when you Process the service lines, select "Mark as Processed" under the action drop down menu for each service line. This will not add a service line to the patients' account but will show a processed status.



I am not seeing a patient I submitted in the old portal on the client list in AlayaCare.
Check your authorization service lines under the Marketplace Referrals Dashboard to confirm if they need processed. If you submitted a referral in the old portal and did not receive auth before your GO LIVE date you must process those services lines to create a patient account. In this situation you will need to click **+New Client & Service** for the first service line to create the account, all subsequent service lines you **only** need to click **+ New Service**. (if you continue to click +New Client & Service for more than one service line, this will create duplicate accounts).

Where can I submit claims, or anything regarding billing in the AlayaCare Portal?
AlayaCare is not associated with anything regarding claims or billing, You will need to submit claims through the CSI Agency Claims email agencyclaims@optioncare.com