Acentra
H E A L T H

CALIFORNIA

Psychiatric Inpatient Concurrent Review and Authorization

How to Submit an Initial Authorization Request for Concurrent Review

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The purpose of this guide is to provide step-by-step instructions on How to Submit an Initial Authorization Request for Concurrent Review in the Atrezzo provider portal.

No PHI was involved in the making of this guide.

All information is for training purposes only and does not contain actual personal or medical data.

Atrezzo Home Page – Create Case

After logging in you will be navigated to the home screen. This page will appear every time you log into Atrezzo.

To submit a new Concurrent Review Request, you will select **Create Case**.

Step 1: Case Parameters

You will be directed to the **New UM Case**. **Case Parameters** and **Request Type** on this page will auto populate. This step has been completed. **Go To Consumer Information**. **(Please Note:** A New Case must be created for every new Admission.)

Step 2: Search Consumer

Enter **Consumer Information** and select **Search**.

NOTE: Combination of DOB and Last Name or Consumer ID (Medi-Cal #) are required. Please be sure to exhaust all search options prior to adding a TEMP Consumer.

Step 2: Search Results

After selecting **Search**, the consumer information will populate below. Review search results and click **Choose** to select the appropriate consumer to create a new case.

Step 2: *Unable to locate?* Add Temporary Consumer

If your consumer search results indicate no records found, you will need to **Add a Temporary Consumer**.

(Please Note: If you are unable to locate consumer, or if consumer is Short-Doyle/Indigent, you will be required to create a Temporary Account.)

Step 2: Create Temporary Consumer - Information

Complete all required information indicated by a red asterisk. Once consumer information is filled select **Create Temporary Consumer.**

Step 2: Consumer Cases - Review

Atrezzo will provide previously submitted requests to ensure no duplicates have been created. If no duplicates are found, click **Create Case**. Please note once you Create Case, your changes will be saved, and the case will be created but not submitted until all required steps are completed. *(At any time if a case needs to be canceled due to error/duplicate you may select **Cancel** to exit case creation.)*

Step 3: Additional Providers / Facility

Your case has been created and additional steps have now been listed. Under **Provide Type** the **Facility** must always be changed to the County of Responsibility of the Consumer. Click **Update** to assign the responsible County.

Step 3: Additional Providers / Facility Continued

Search for County name only. All other fields are not required. Once you locate the appropriate county you will select **Choose.** The page will then reload and auto populate the appropriate county. Select **Go to Service Details.**

Step 4: Service Details

The following details below will be required. Admission Source (Involuntary vs. Voluntary), Admission Date (Date of patient's admission date), Place of Service (Inpatient Psychiatric Facility), and Service Type (Inpatient Psychiatric). Complete appropriate options from drop downs, select **Go To Diagnosis.**

Step 5: Diagnosis

To add a diagnosis, **Search** by selecting the white box and type ICD10 Diagnosis Code or Name. When the diagnosis code has populated select the appropriate code. If there are any additional codes, you may add more by following the same process. If a diagnosis code needs to be deleted select remove to deactivate code. **Select Go To Requests.**

Step 6: Request Type

A Request Type will need to be selected. When submitting an Initial Authorization for Concurrent Review you will select Concurrent. A FIPS Code will <u>not</u> be required. The Notification Date and Time will prepopulate to the time that the case is being submitted. This cannot be changed. Once you have selected your request type **Go To Procedures.**

Step 6: Request Length of Stay

For Inpatient Authorizations, the only fields required are the **Requested Start Date** and **Requested End Date**. When submitting a **Concurrent Review Authorization,** the number of days requested are a max of 3 days. The Atrezzo portal will calculate the Requested Duration. **Go To Questionnaires**.

Step 7: Questionnaires

The **Admission Questionnaire** will be required for all Psychiatric Inpatient Services. Click **Open** to complete the Admission questionnaire. *(Administrative Days Questionnaire: Only applicable to IMD/FI facilities, Continued Stay Questionnaire: Optional, Social Determinants of Health: Optional.)*

Step 7: Admission Questionnaire

Once the required questions are complete, a green check mark will appear on the top left side of the Admission Bar. Click **Mark As Complete** to return to case.

Step 7: Questionnaire Completed

The required Admission Questionnaire is now Marked as Complete, you will be redirected back to the case. The Notification Date and Time will prepopulate to the time that the questionnaire was completed. This cannot be changed. **Click Go to Attachments**.

Step 8: Attachments

For **Concurrent Review Authorization** the 24-hour Notice of Admission documents are required prior to submitting a case. To upload supporting documentation, click **Upload a Document**. (*For Reference: A list of required documentation is provided on page 21.*)

Step 8: Upload a Document

To add supporting documentation, you will be able **to Drag and Drop** documents from your desktop or **Browse** to select the documents from your files. You will then select the appropriate **Document Type** and click **Upload** you may add more by following the same process. Once all documents are uploaded **Go To Communications**.
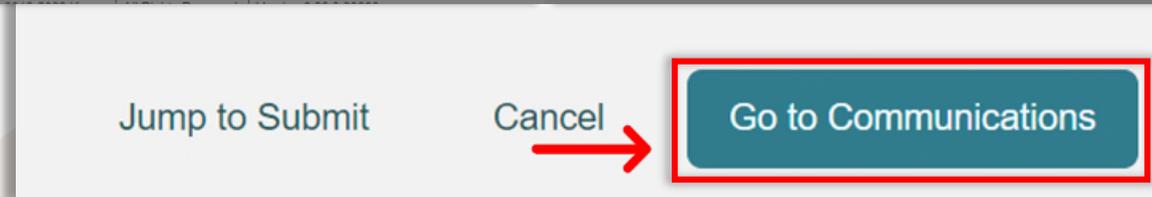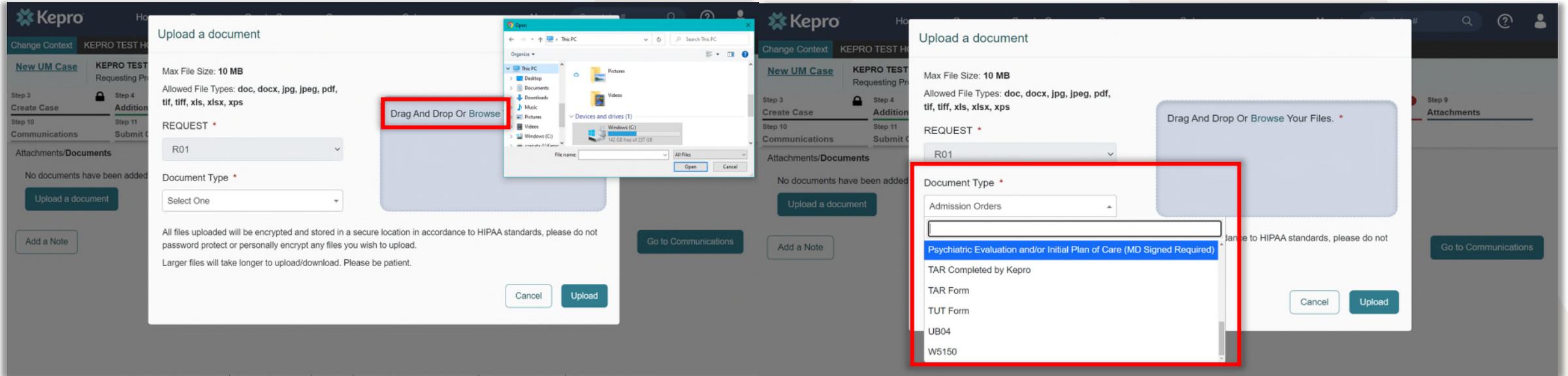
Concurrent Review Authorization Requirements

First Initial Request: *(Notification within 24 hours of admission and every 72 hours after admission)* for beneficiaries meeting medical necessity for Inpatient Submission.

24 Hour NOA (Notice of Admission) Required Documentation:

- Face Sheet

- Medi-Cal Verification *(If applicable to patient)*

- Admission Orders *(Physician signed)*

- Psychiatric Evaluation *(Physician signed)*

- Legal Documents: W5150, Voluntary Paperwork, Conservatorship Paperwork, Presumptive Transfer Paperwork, JV 220A *(If applicable to patient)*

References: BHIN 22-017; 42 C.F.R., § 438.910(b)(1), 42 C.F.R., § 438.910(d)(1); Welf. & Inst. Code, § 14197.1(a) 16 42 C.F.R., § 438.920(b)(1); MHP Contract, Ex. A, Att. 12; 42 CFR, § 438.210(b)(2)(i-ii); 42 C.F.R., § 438.10(g)(2)(iv); Health & Saf. Code, §§ 1367.01(i), 1371.4(a); 42 CFR § 456.170; 42 CFR § 456.180; 42 CFR § 441.155; Health & Saf. Code, §1367.01(h)(2); Health & Saf. Code, § 1367.01(h)(3); 42 C.F.R. § 438.210(b)(3); Welf. & Inst. Code 14197.1; Health & Saf. Code, § 1367.01(e); Welf. & Inst. Code 14197.1; Health & Saf. Code, § 1367.01(h)(4); 42 C.F.R. § 438.404(c), 42 C.F.R. § 431.213(c); See generally 42 C.F.R., §§ 438.210(c), 438.404; MHSUDS IN 18-010E; 42 C.F.R. § 438.402(c)(1)(ii); Cal. Code Regs., tit. 9, § 1820.230(d)(2); Welf. & Inst. Code, §§ 14184.402, 14184.102 and 14184.400.

Step 9: Communications

Any correspondence between Hospital Staff and the Acentra Health Clinical Team can be done by adding a note. Select **Add a Note** to compose a new message. If communication is not needed at this time, you may continue and select **Go To Submit.**

Step 10: Review and Submit Case

Prior to submitting a request, you will be able to review and make any changes by selecting **Update**. If changes are not needed, you may proceed to **Submit**. You will then receive a disclaimer stating prior to submission you understand that precertification does not guarantee payment. After choosing **Agree** your case will be then be submitted for review.

Submitted Request – Concurrent Review Process Begins

The Initial Authorization Request for Concurrent Review has now been **Submitted**. A Continued-Stay Authorization Request will be needed every 3 days (72-hours) thereafter for the duration of the treatment episode. Documentation of the **CASE ID** is highly recommended. The unique Case ID can be utilized in the **Search by # Bar** to monitor case progress. The **Case Summary** tab will also provide a full overview of the case which can be printed or saved for reference. For next steps please see How to Submit a Continued-Stay Authorization Request.

For additional resources or support please contact Customer Service: (866) 449-2737