CDASS PAR Revisions

Helpful Tips for CDASS Rate Change Revisions

Colorado InterChange - Case Manager Guide

November 2022

COLORADO
Department of Health Care
Policy & Financing

Course Description

The goal of this training is to provide you with training for Consumer Directed Attendant Support Services (CDASS) Prior Authorization Request (PAR) Revisions.

- Copying and editing a CDASS Task Worksheet
- Adding and editing a CDASS Allocation
- Adding CDASS Services to a line item
- Identifying Denver Geographic Pricing

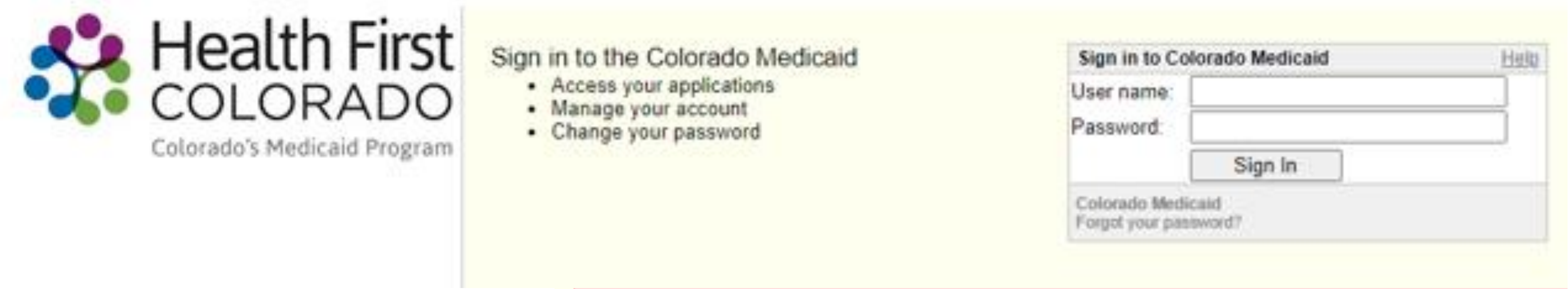
Table of Contents

Creating CDASS Services on a PAR

There are two areas of CDASS Services that are needed to be completed for a client to receive these services on a waiver program PAR:

1. **CDASS Task Worksheet (WS):** This is where the user will enter the minutes per week for various activities under Personal Care, Health Maintenance, Enhanced Homemaker and Homemaker.
2. **CDASS Allocation:** This is where the user will attach the CDASS Task Worksheet and create service allocations for the PPA cert span.

Let’s Get Started!



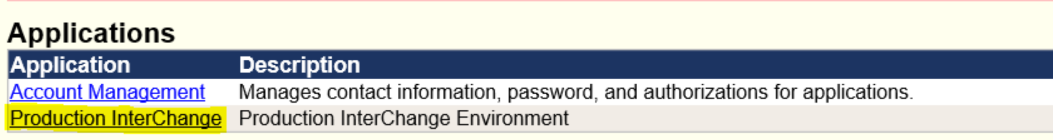
Step 1.

Go to [Colorado InterChange (iC)]()

Step 2. Enter Credentials-Sign in

Step 3. Select Production InterChange

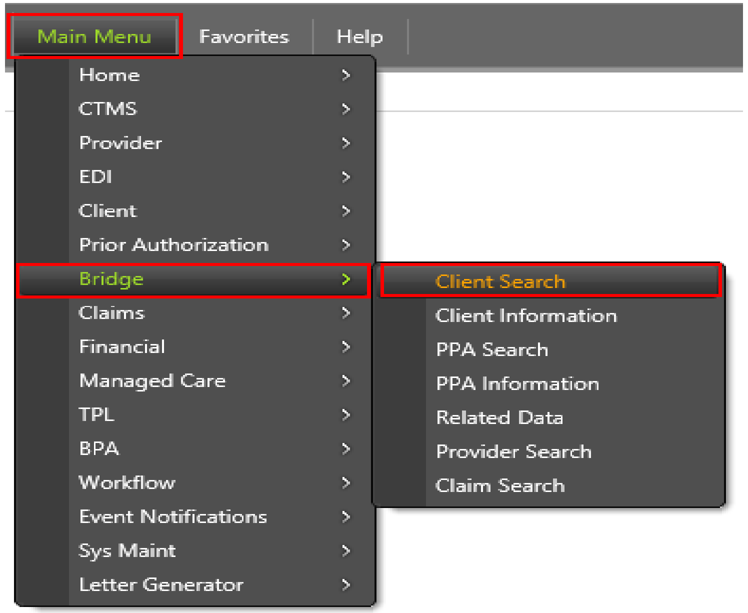
Step 4. Hover over Main Menu. You will be using the ‘Bridge’: Client Search and PPA Search



Applications

Application	Description
Account Management	Manages contact information, password, and authorizations for applications.
Production InterChange	Production InterChange Environment

Note: ‘Client Search’ or ‘Client Information’ → Gets you to the Task worksheet and ‘PPA Information’ → PPA; i.e. allocation and service authorization



Know the System

Each part of the system communicates to other areas with in it. Understanding where information goes is crucial. There are specific buttons to use and reasons why errors pop up if/when a step is missed. Keep in mind: many steps require you to clicking anywhere on the screen to update the information being worked on.

Client Search or information → Find Task worksheet in Client information
Task worksheet → Save "talks" to the PAR (either existing or a new PAR added based on date span).

PPA = Pre-Prior Authorization→ Allocations under Allocation Tab. ('Saved' Task worksheets talk to the allocation tab in the PPA. *****Can search by Client ID, PPA # or PA#. Client ID will give you a list of PARs for that member.

Adding or Changes in <u>Allocation Tab</u>→ 'Syncing' Pulls info from Task worksheet and Saving "talks" to the service line when adding new or revising **If you miss a step of "syncing" or completing "saving" then the service line won't know it's supposed to make the changes to the current T2025 service line.

Base Panel Information→

1. **'Submit PPA'** talks to the PA (Prior Authorization-only Dept views and feeds into Provider Portal "Gatekeeper of Claims") -The system batches **1x per night at** approximately 7pm. *Entering late evening results in 1 day delay
2. **'Sync'** in base panel if selected pulls information back to the PPA from the PA *****DO <u>NOT</u> USE BASE PANEL SYNC FOR THESE REVISIONS or for CDASS in general.

CDASS Task Worksheet

Use these instructions to copy a CDASS Task Worksheet in the Bridge. This panel is located under the Client Information section of the Bridge.

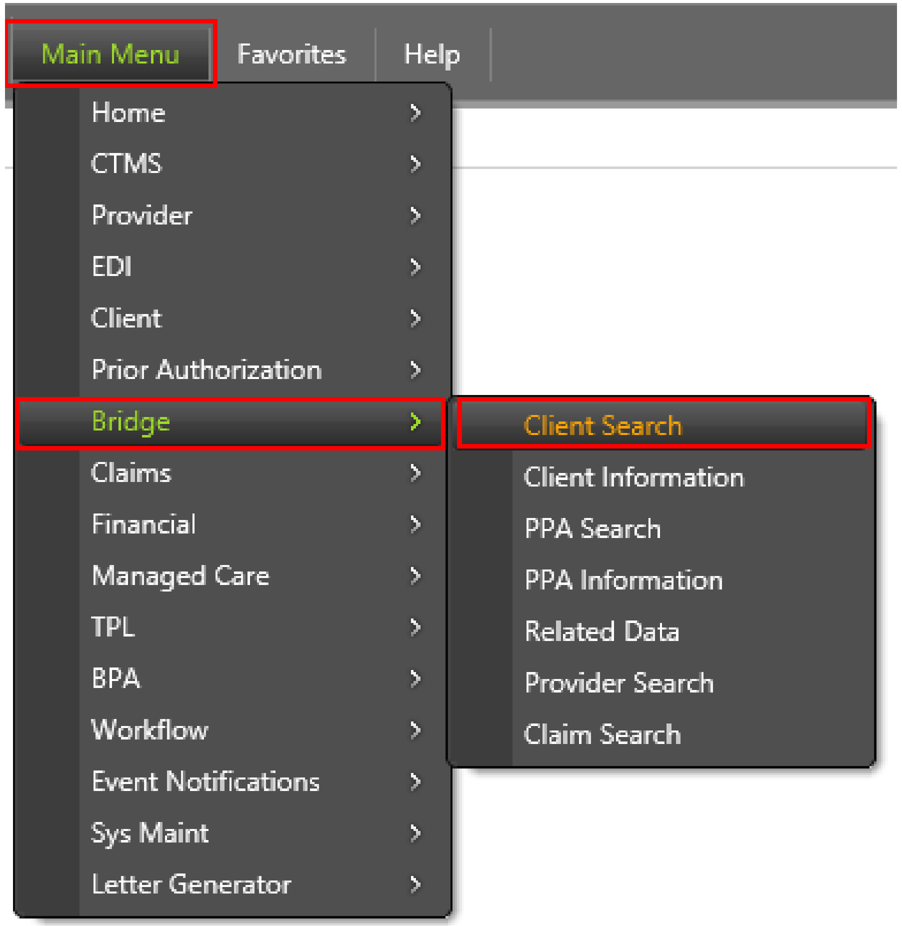
* Note: You can have two tabs open-(1) for the task worksheet and (1) for the PPA by right clicking and opening new tab. If you use 2 tabs, remember to refresh the PPA following changes in the task worksheet.

Locating CDASS Task Worksheet

Step 1. Search for the client

Under Main Menu select the Bridge application and then select Client Search.

* **Note:** Some may find it easier to locate the PPA first to review and then open the task worksheet in a separate tab.



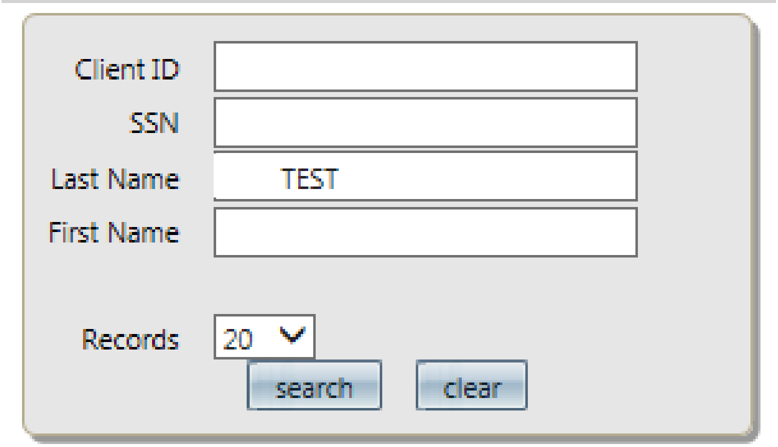
Locating a CDASS Task Worksheet

Step 2: Search for applicant in the Bridge

Enter information to find a client's record
Don't have to use all search fields (at least 1):

- Client ID – Medicaid Client ID
- SSN – Client's Social Security Number
    - Enter the number with or without the dashes
- Last Name – User can enter full or partial last name
    - Recommended to enter the full name to reduce the number of records returned
- First Name - User can enter full or partial first name
    - At least 2 characters of the Last Name is needed
- Records – Search records are defaulted to 20 results
    - User can select to have 5, 10, 20, 50 or 100 records show

Press Search

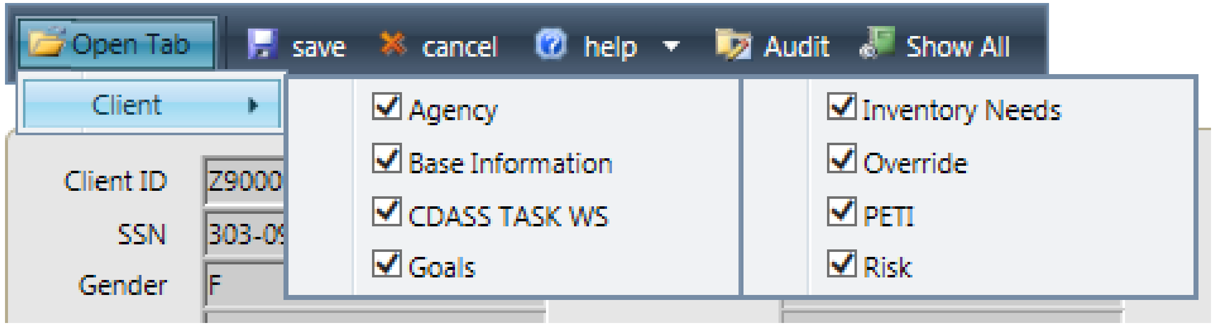


Creating a CDASS Task Worksheet View (Details)

Step 3. Creating a worksheet

- Display CDASS Task Worksheet (if not already visible)
  - Click open tab and go to client and select.
  - Check CDASS Task WS.

- If you only want to display the panel for the current session, click on the word next to a checkbox.

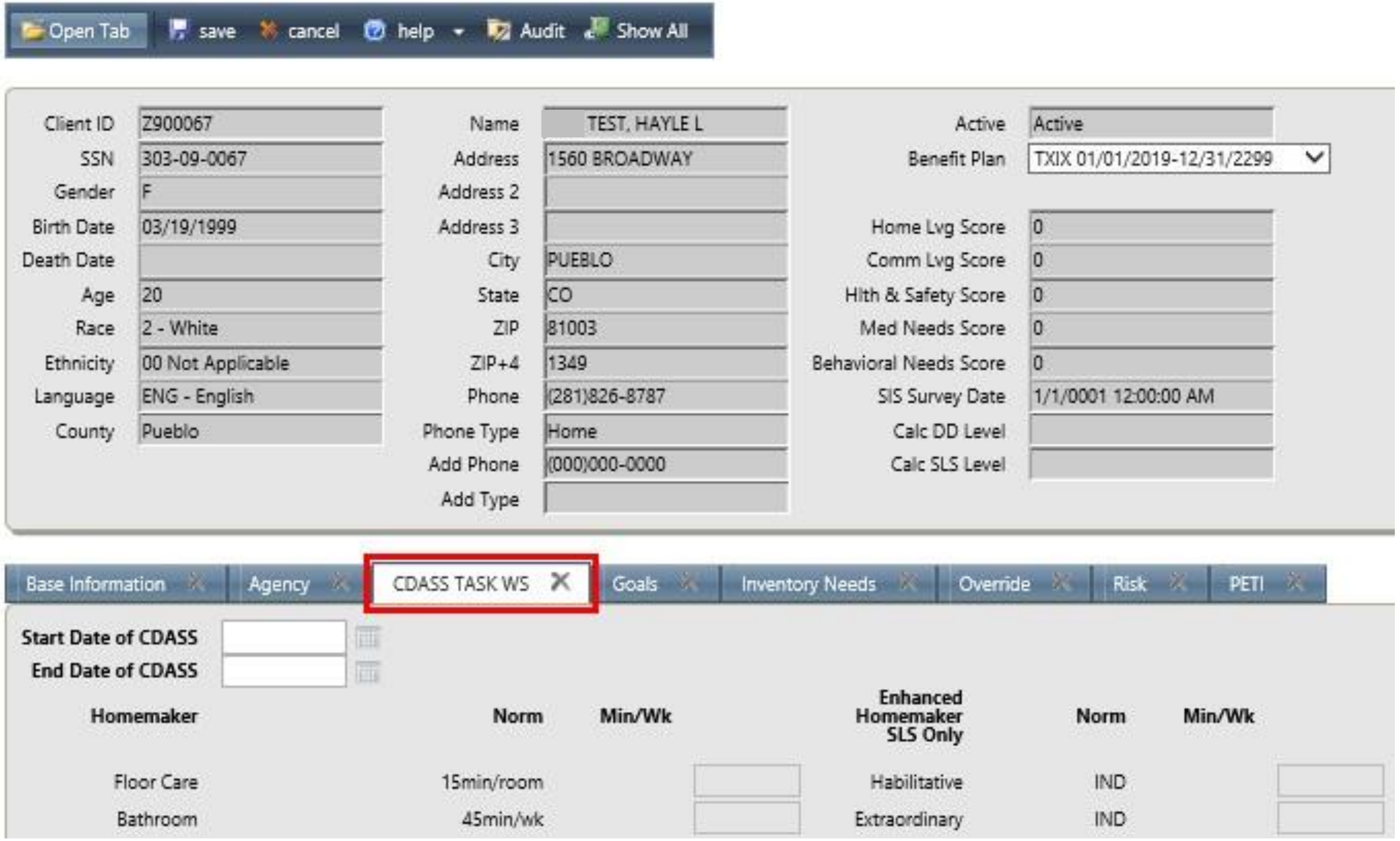


* **Note**: Checking a box will keep that panel displayed for future sessions.

Locating a CDASS Task Worksheet (Details)

Step 4. Select CDASS Task Worksheet tab on the panel

Locate the CDASS Task WS panel



Revising (Copying) CDASS PAR

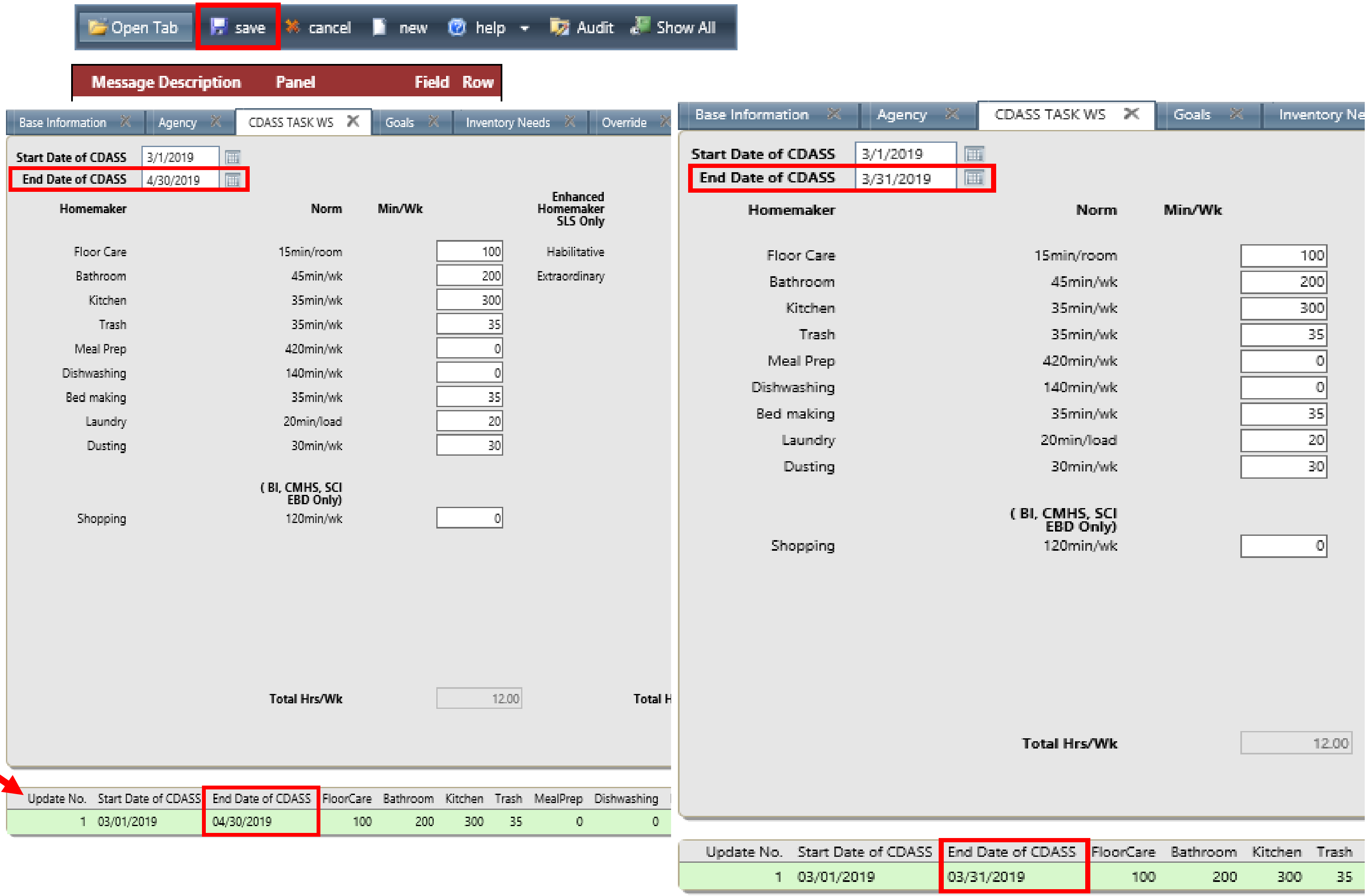
- Use these instructions to complete a revision to an existing task worksheet.

Revising CDASS PAR for an EBD Client

Step 1. Ending Current Task WS

- Select corresponding worksheet
- End date it
- **Click Save**

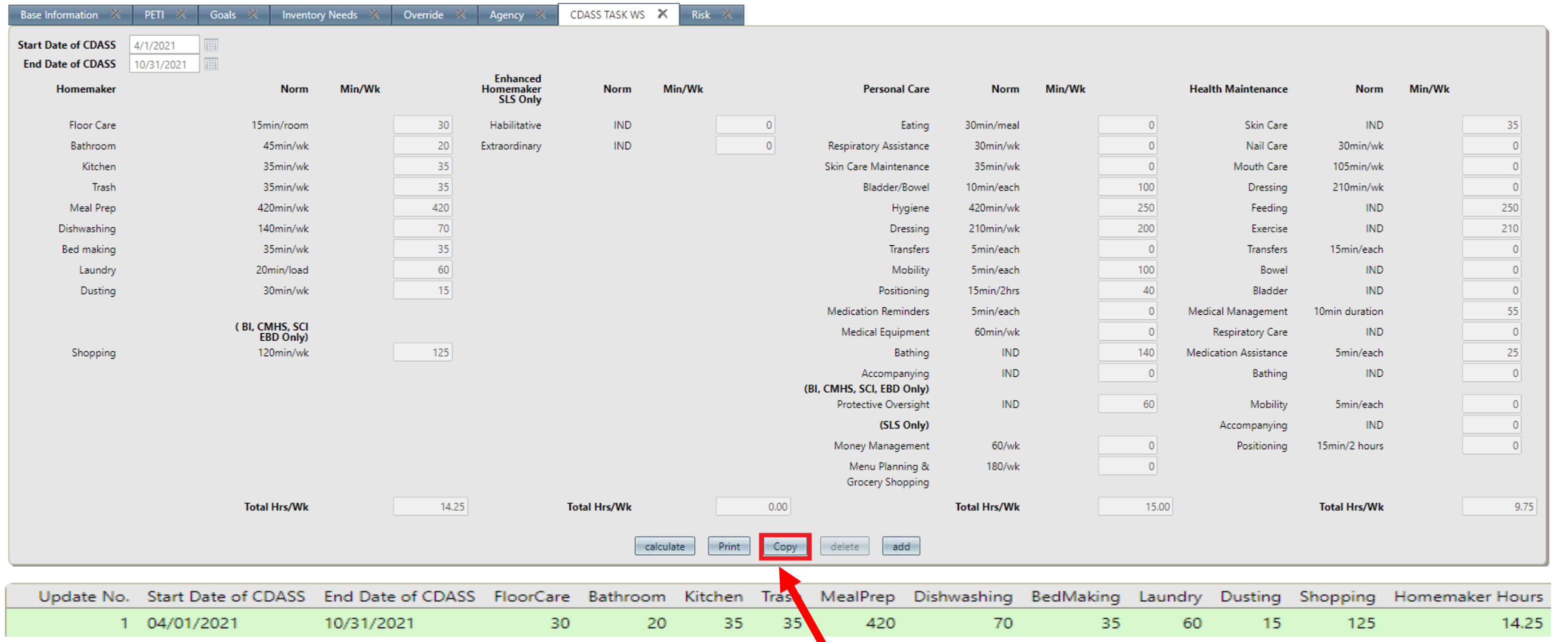
*** Note:** Click ‘Update No.’ if worksheets are out of order.



Revising CDASS PAR-Task Worksheet Copy

Step 2. Copy CDASS Task WS

- Select the end dated worksheet by clicking on the worksheet **<u>again</u>** even if the worksheet appears to remain in the panel.
- Select copy



*** Note: Failure to reselect the worksheet after saving and prior to selecting ‘copy’ may result in the wrong task worksheet being copied.**

Revising CDASS PAR-Task worksheet

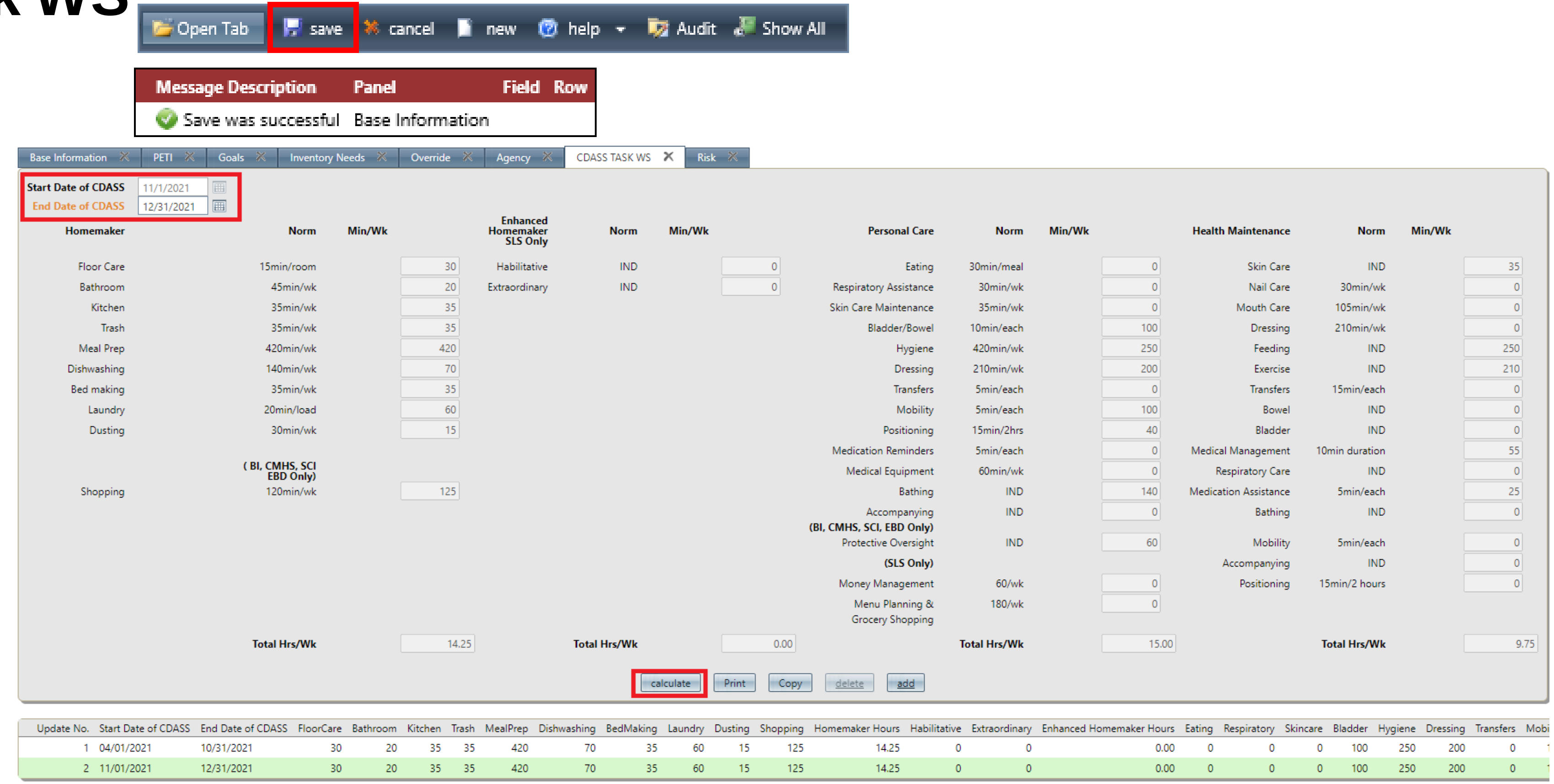
Step 3. Copy CDASS Task WS

- Task Min/Wk should auto populate from task worksheet copied
- Enter Start and End Date
- Select Calculate (min/wk tasks can be changed at this step)
- <u>**Click Save**</u>
- CDASS changes will show on the panel. *Double check service hours- revise if copy error, calculate, save

*** Note:**

1. Revised CDASS Task WS start date cannot overlap with prior end date.

2. You don't have to use "copy" & can 'add' a new TW for blank tasks. Double check hours are correct.



Revising CDASS PAR

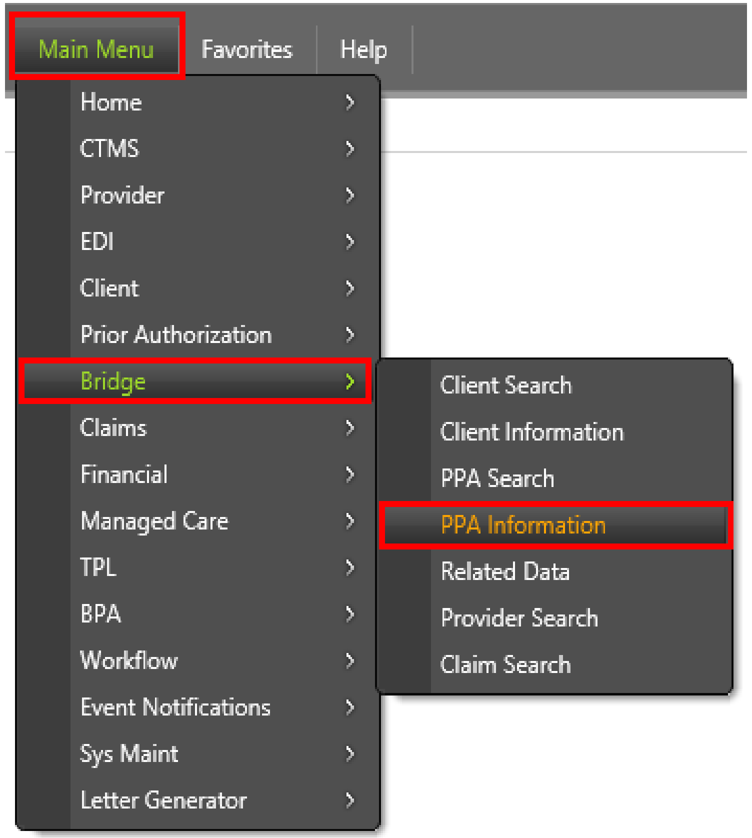
Use these instructions to locate the PAR and continue revision of allocation and PAR after task worksheet has completed the revision/copy.

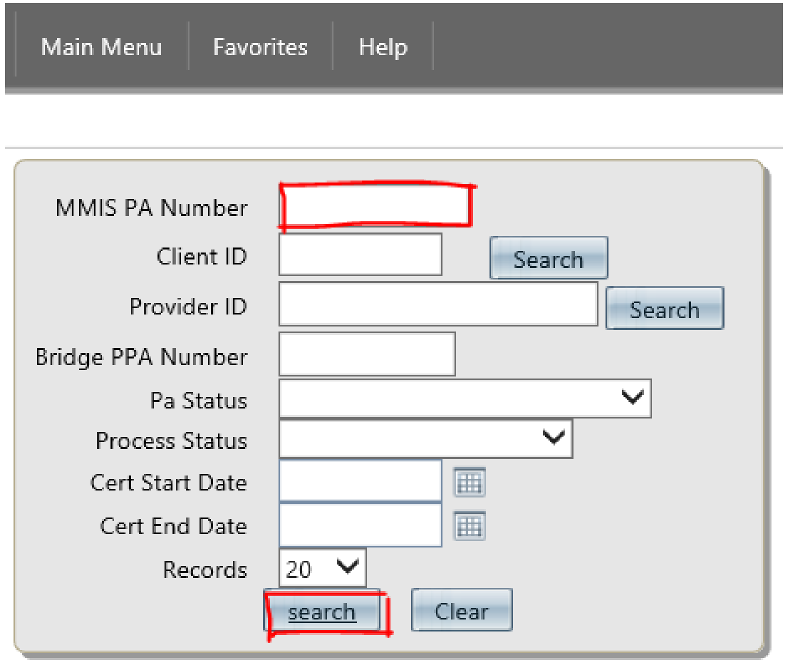
* Note: If the PAR is open in a separate tab, make sure to refresh the page to allow for the PAR to know the task worksheet had changes made to it.

Locating a CDASS Allocation (Details)

Step 1. Find PAR

- Select the Bridge from Main Menu
- Select PPA information
- Enter PA # (If the end date shows 12/31 or prior, use client ID to find latest PAR), PPA #, or client ID





* **Note:** If you right click while hovered over selection, you can open in new window/tab. Selecting will use current window.

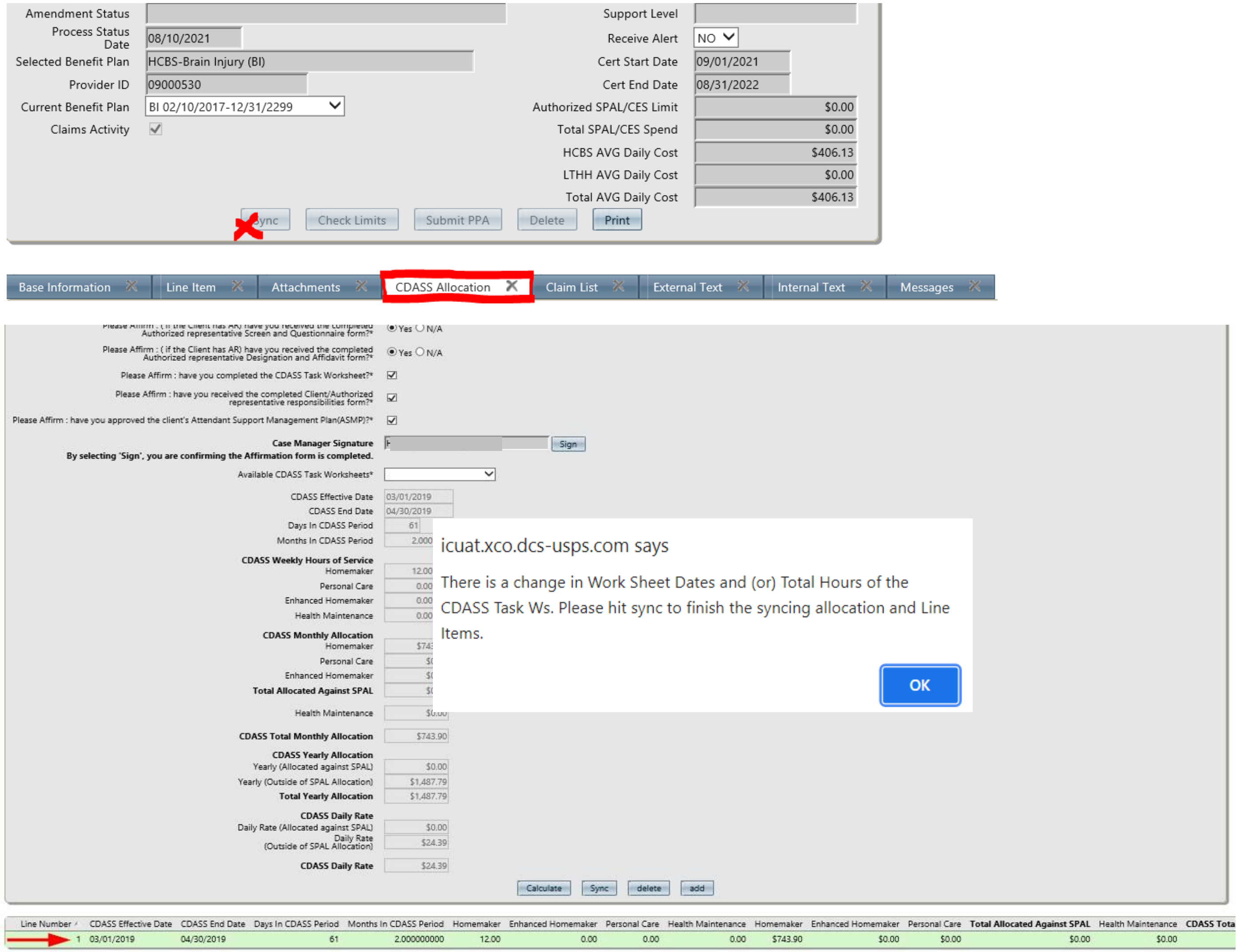
Revising CDASS PAR- Syncing

2. Updating the CDASS Allocation

- Locate the desired PAR

  Do not select “sync” under base information panel if message populates when accessing desired PAR

- Select the Allocation tab
- Select the last CDASS Allocation
- A message will populate that a change was made to CDASS Task WS
- <u>Click OK</u>



Revising CDASS PAR- Syncing Cont.

3. Sync Allocation

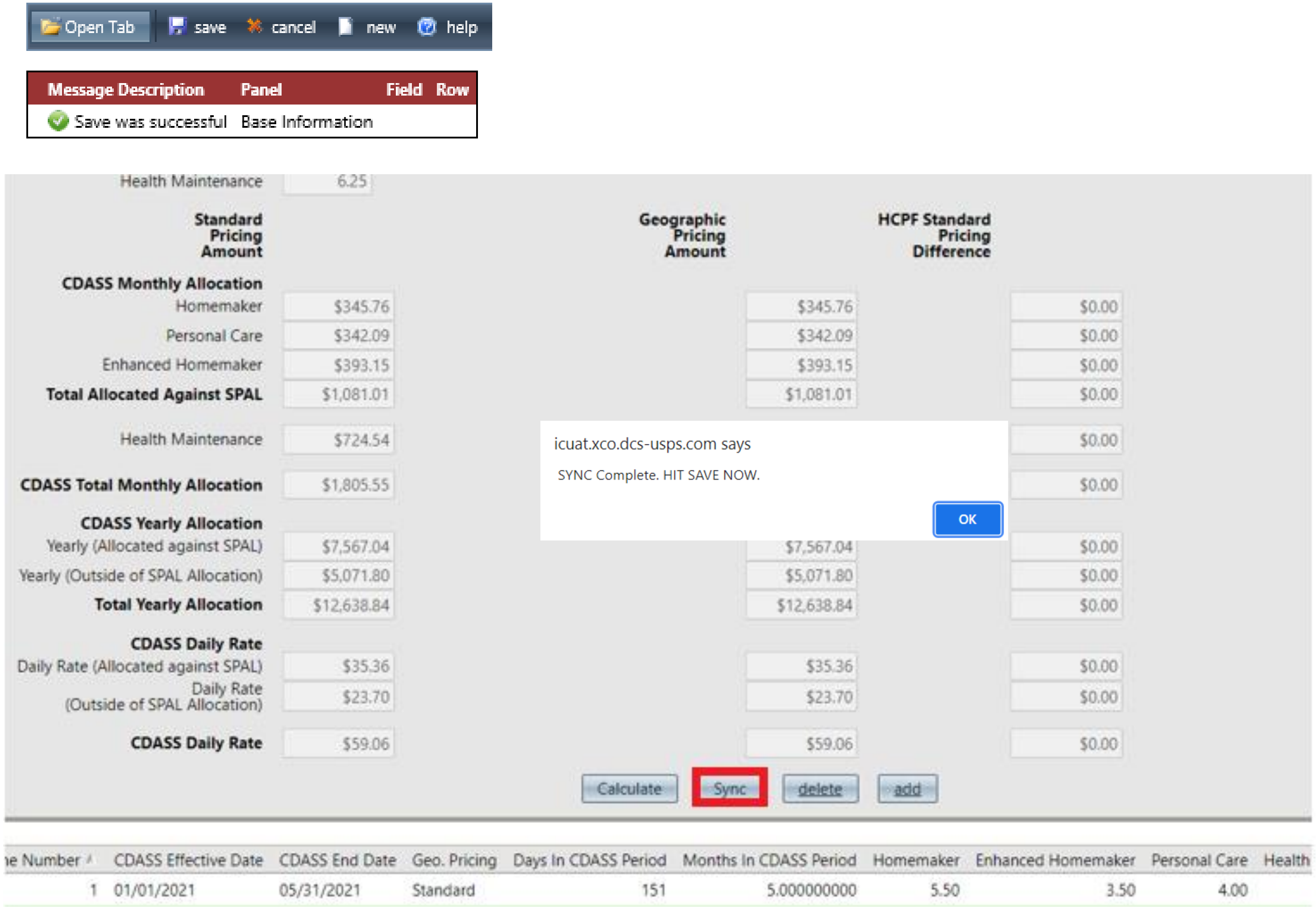
- Click Sync
- A message will populate that the sync was complete

  Click sync again if no message.
  Do not continue without it.

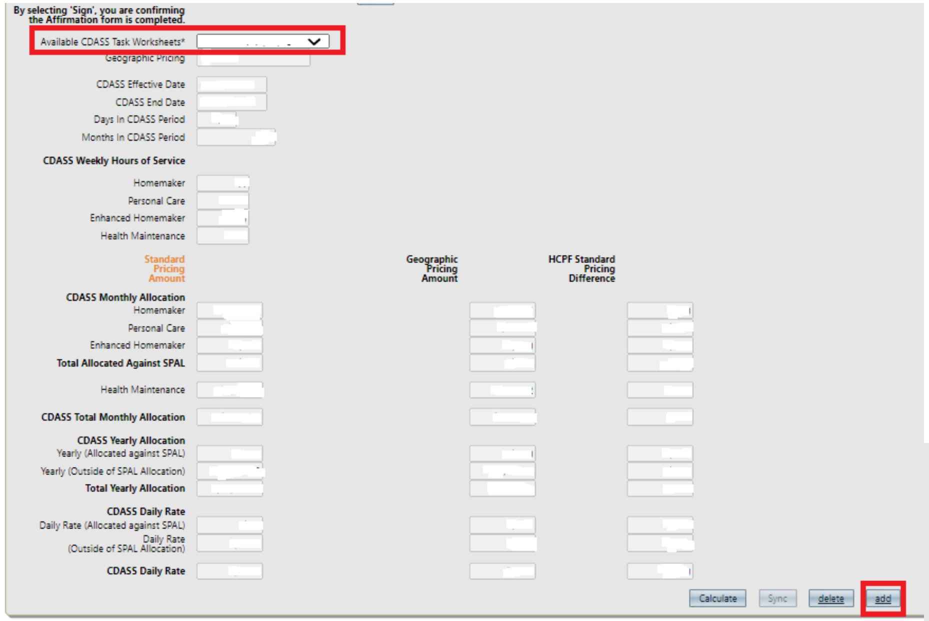
- Click Save

  Make sure you get the 'save was successful' message prior to continuing.

* Note: Only sync CDASS changes in allocation tab.



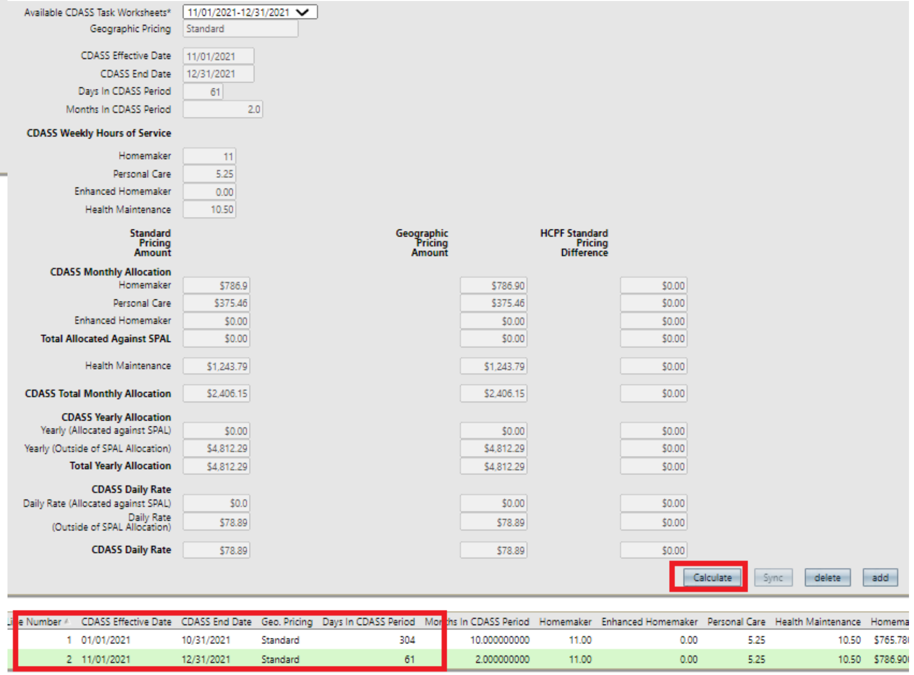
Revising CDASS PAR- Allocation



4. Add Allocation 1:2

- Click 'add'
- Select dropdown and new allocation.
- Click on screen
- Click Calculate

*** Note: Only add allocation following the successful 'sync' and 'save'**



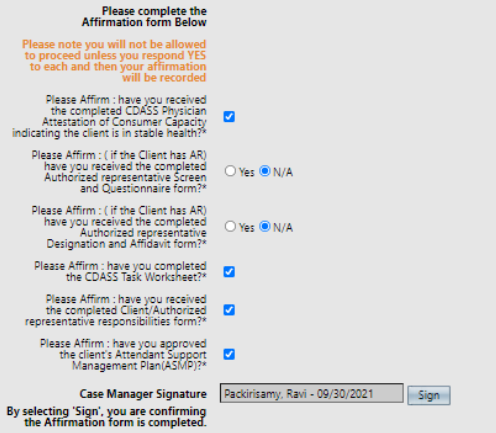
Revising CDASS PAR-Adding Allocation Cont.

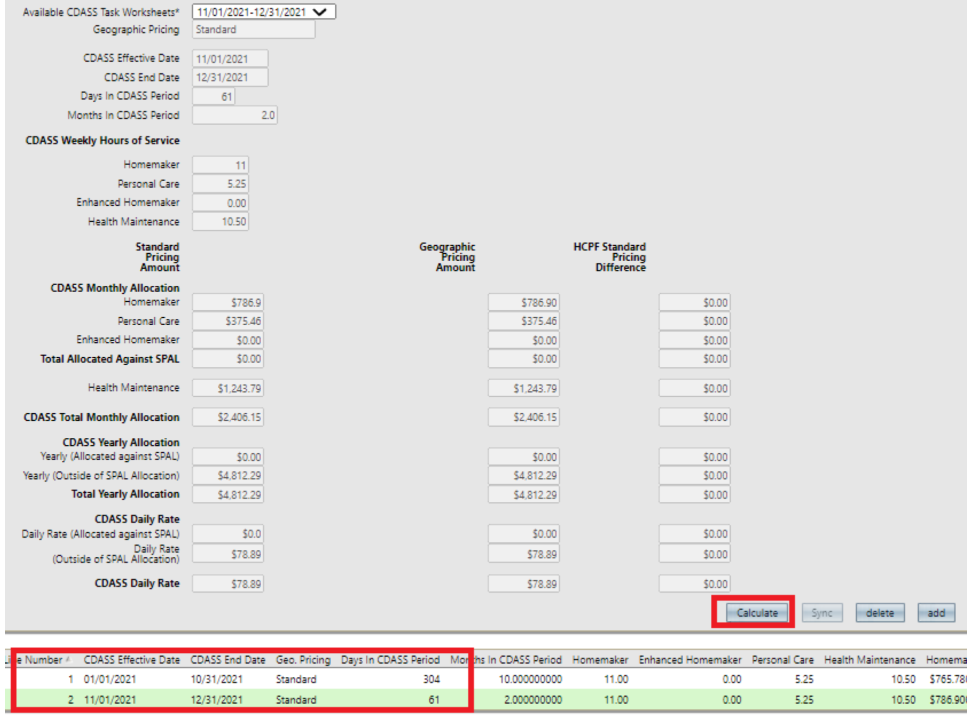
5. Add Allocation 2:2

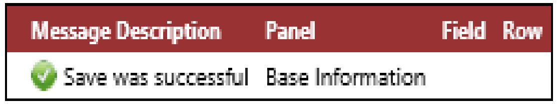
- Click Calculate
- Check Both allocations are updated in the data panel
- Complete Affirmation form and Case Manager signature
- <u>Click Save</u>

*Note:
1. Confirm allocations have calculated and days do not exceed 365.

2. Confirm service hours are correct and match prior allocation if 'copied'. <u>STOP</u> and revise TW if copy error occurred. Delete allocation line and go back to TW. Make sure to 'calculate' after any TW changes prior to saving TW.



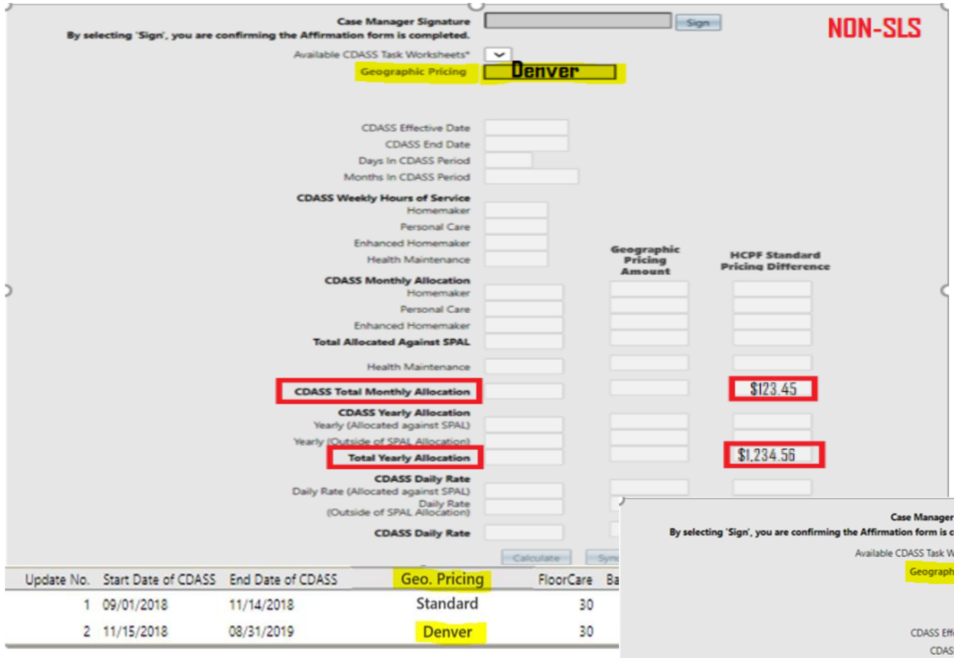


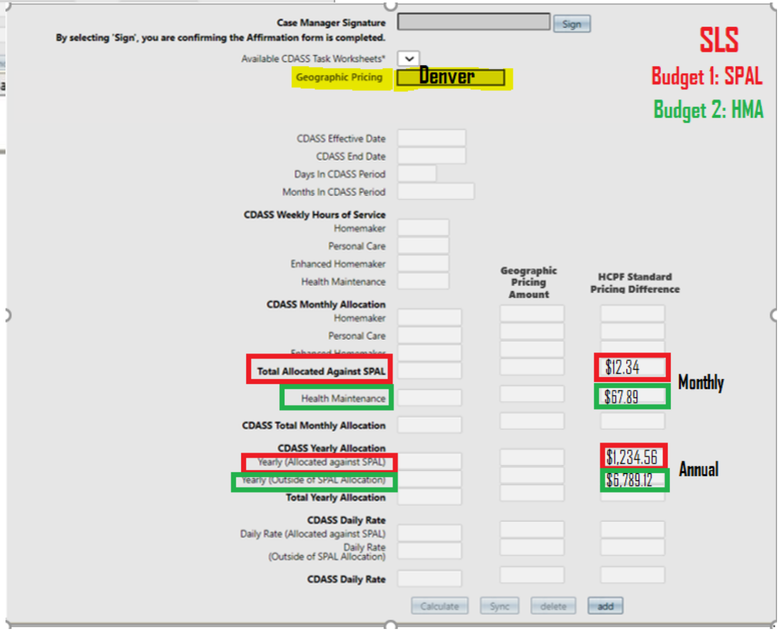


Identifying Denver Unit Differential

6. Members with Denver Residence

- The allocation panel will auto populate if the member lives in Denver or is Standard Pricing (non-Denver)
- ‘Geographic Pricing’ will have Denver
- Once calculated, the ‘HCPF Standard Pricing Difference will have $ amounts instead of ‘0.00’ for Standard





***Note: FMS Portals-Denver Interim Process**

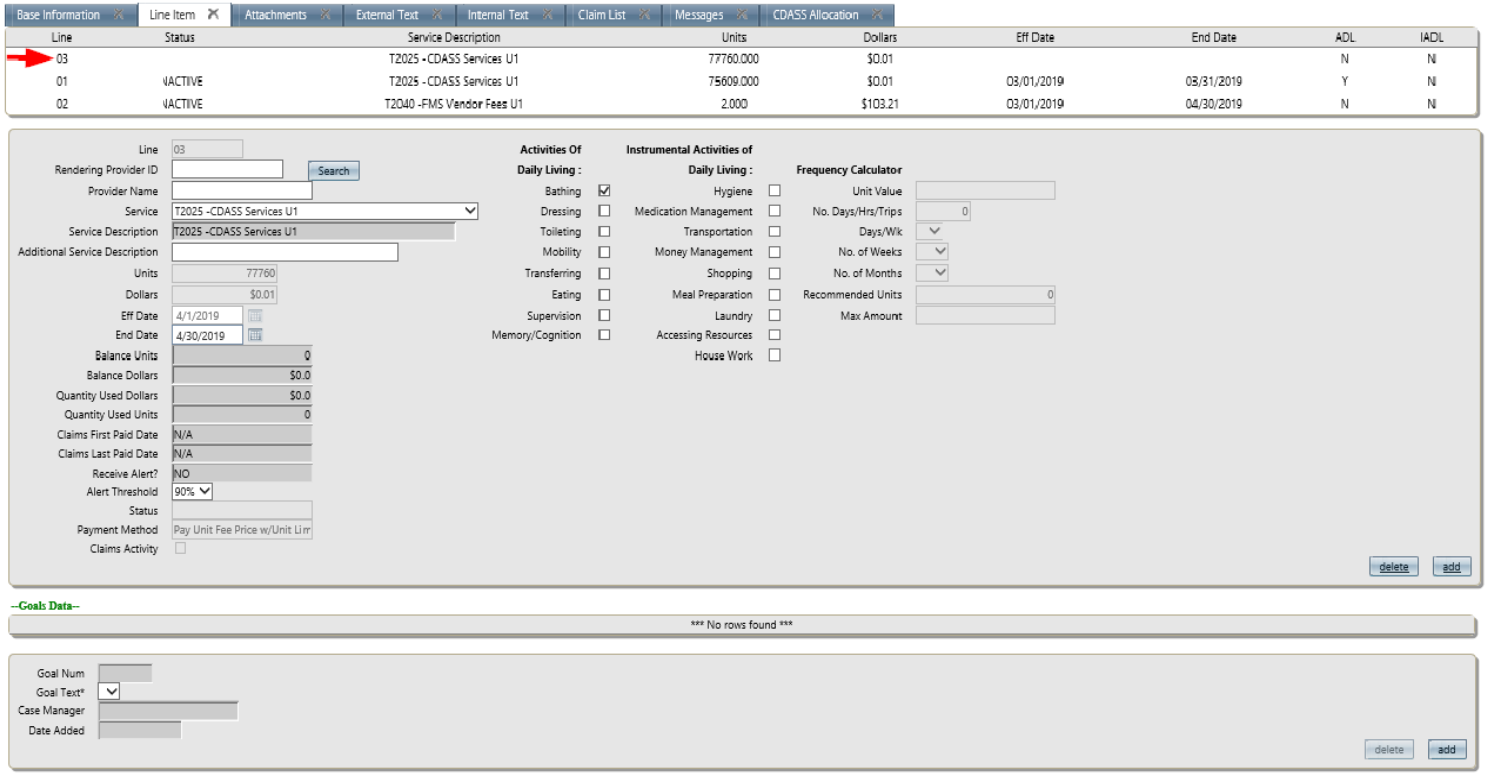
1. Either click on allocation line with Denver and take a screenshot for the FMS, or
2. Provide the ‘CDASS Total Monthly Allocation’ and ‘Total Yearly Allocation’ amounts located in 3rd column.

Contact FMS for assistance

Revising CDASS PAR- Add T2025 Service Line

7. Add an additional CDASS line Item

- Select 'Line Item' Tab
- Select T2025 line and hit 'Add'
- Add new CDASS services from drop down (T2025)
    - ➢ SLS may have 2 T2025 lines (U8 and U8 SE) to complete
- Enter 'end date'
- It will display multiple CDASS Lines until saved (notice the original T2025 line automatically changed end date)



*** Note:** Line for T2040 does not need to be added or changed unless changing FMS provider with a different unit rate

Revising CDASS PAR-After Service Line Added

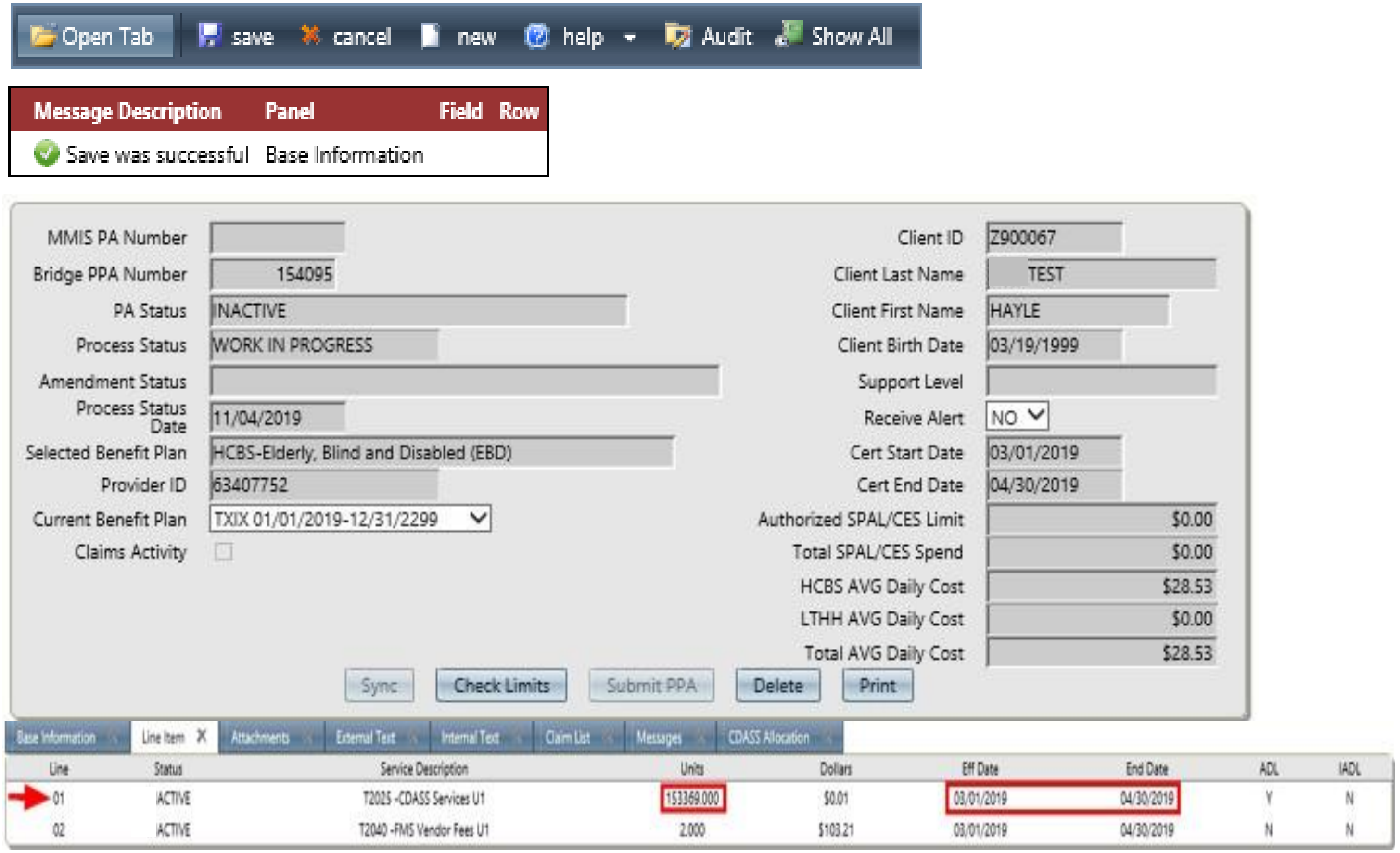
8. Merge CDASS Lines

- <u>Click save</u> and line will merge into one.

  If line doesn't merge, <u>STOP</u>. Delete line and do no submit with multiple T2025 lines if there was not a gap in services.

* **Note:** New total units merged in line's calculation can be checked by adding the total units for each allocation line at the bottom of allocation tab.

  - Allocation tab → scroll over → add annual units.
  - Make sure T2025 has full CDASS certification start and end date

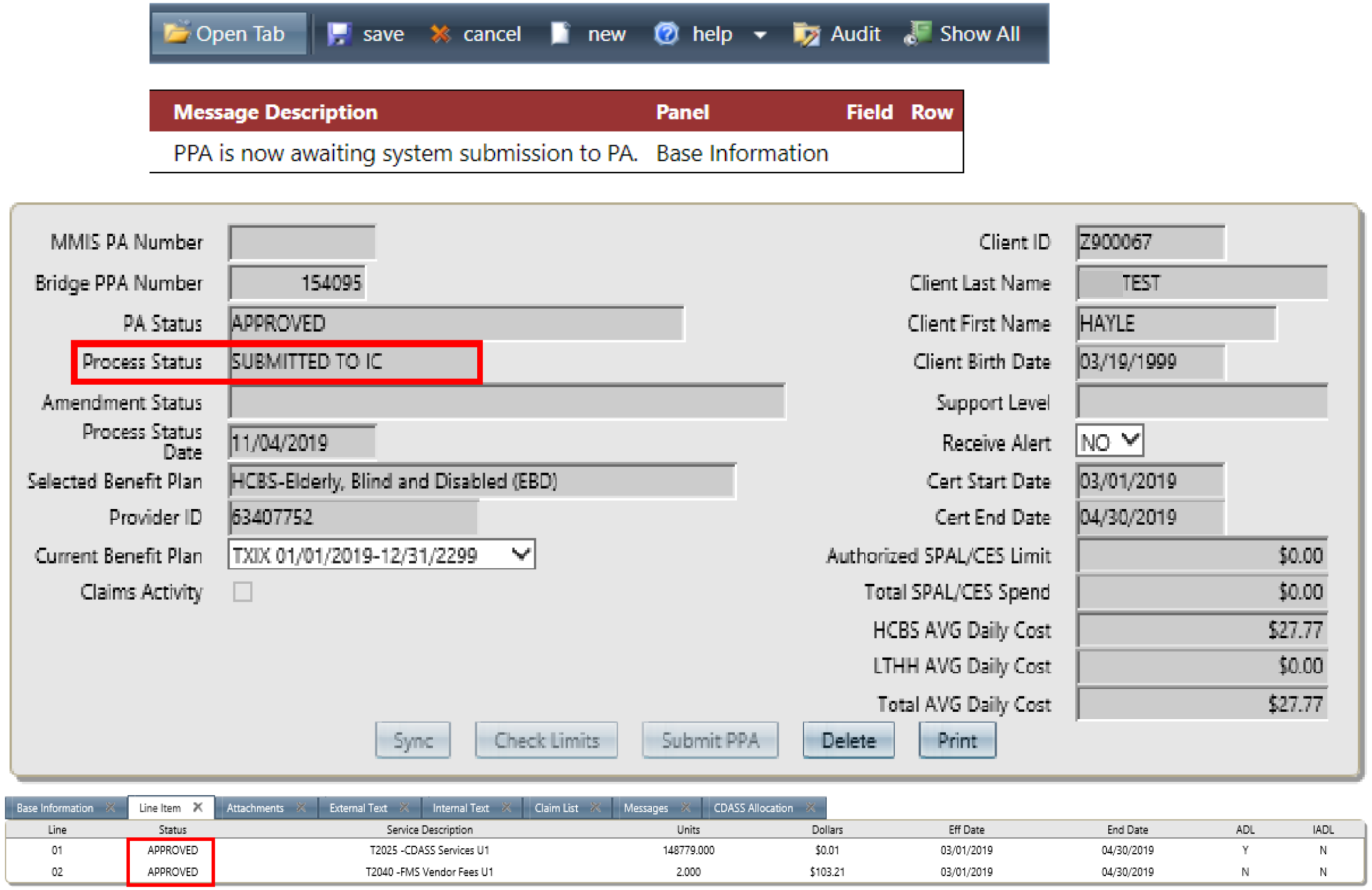


Submitting Revised CDASS PAR

9. Submission

- Once T2025 lines merged and saved, Hit check limits
- Resolve any issues or error messages if applicable
- Submit PPA
- PAR status will be displayed in data panel.
- PPA submitted successfully when message appears

*** Note:** If error message appears, select the message tab. Message will show a code and select the code and error reason will generate. Make required changes, save, check limits and submit PPA.



PAR Revision Completion

Submitted PPA Successfully

- Complete Required Steps in the FMS Portal (Denver members may have an extra step to complete with the FMS)
- Move on to the next PAR
- Once approved in the FMS portal, the CM sends Client Notification Letter using only the amounts in the FMS portals.

* **Note:** The Bridge batches 1x per night around 7pm. The FMS would not have view in the provider portal of the updated units until the following day. If entered in the Bridge after 7pm, the revision would not be batched until the following night resulting in provider portal not having the update for 2 days.

Some CDASS Error Codes

B015
SLS CDASS-SPAL Spending Exceeds Limits
- Resolution is to edit last task worksheet or lower units from other services.
- Further questions for SPAL is to reach out to the Department.

B075
CDASS - Affirmation Form incomplete
- Resolution is to Complete the Allocation form and hit save.

B037
Exceeds Daily Cost
- Resolution is to have a supervisor complete the ‘submit PPA’ using their supervisor credentials.

B077
CDASS - Procedure code missing
- Resolution is to add one of the CDASS Services to the line item.

Helpful Tips

1. **Take it slow. Missing a step creates errors, resulting in extra work for you.**
2. **Know how the different parts of the Bridge connect.**
    a. Client Information: CDASS Task Worksheet→ the Bridge PPA: Allocation Tab and allocation lines→ the Bridge PPA: Service Lines (T2025)
    b. Missing a 'save' or 'sync' step loses the connection (or communicates incorrectly) to the next parts results a ripple effect of errors in each part after the missed step.

3. You can have two (2) tabs open, 1 for Client Information and 1 for the PPA.
    a. 'Right click' when opening client information or when opening PPA search
    b. After saving the updated task worksheet in client information, make sure to 'refresh' the PPA page before updating the allocation line.

4. Line numbers will be out of order In the CDASS task worksheet in the client information.
    a. Please sort by clicking on 'Update No.' and it will put them in order.

5. Make sure you reselect the task worksheet you want to copy after you have completed the end date and save.
    a. Double check service hours match and were copied correctly.
    b. Delete the task worksheet copied if it's wrong or only blank. Click on last task worksheet and hit copy to try again.
    c. Once you have the allocation line attached to the PA, you will not be able to revise and must contact the help desk.

6. If you click on the allocation line and a pop up for syncing doesn't generate:
    Stop! Do not add the new allocation) and go back to the client information and make sure it was saved successfully. Then refresh PPA and try again.

Helpful Tips

7. There are pop-ups that provide instructions about steps to be completed.

a. Make sure you 'save' after selecting the 'sync' in the CDASS allocation. Not saving after will result in errors when adding the line item.

b. Make sure to 'save' after adding the new allocation line. No save = error with service line

8. Double check the allocation lines for the correct number of days. If it doesn't recalculate number of days, STOP. There should not be more than 365 days combined total.

a. If you haven't added the new allocation, stop. Go back to the task worksheet and make sure it saved; refresh and try steps again.

b. If you have added the new allocation, delete the allocation line added. Refresh the tab. Go back to the task worksheet and redo.

9. Make sure you 'save' the allocation updates prior to adding the T2025 service line/s.

10. There should only be (1) T2025 with the same modifier. The T2025 allocation lines merge into 1 service line.

a. Separate T2025 lines with same modifier will create issues and require a data fix if fully submitted.

b. If lines don't merge after saving, stop! Delete the new line. Work backwards – delete the new service line, delete allocation line, and delete task worksheet. Redo all steps making sure all steps are saved.

11. Check to make sure the T2025 line (s) have the start date from the original allocation start date to the last end date (full span).

a. Do not submit if there is only partial start and end date.

12. If you aren't sure if something is correct:

STOP. Do not click 'Submit PPA'.

Quick Reference

1. Login into MEUPS
2. Look up PA # in Bridge (Main Menu→ Bridge→ PPA Search→ Enter PA #)
3. Look up client in Bridge (Main Menu→ Bridge→ Client search/info→ Click Task Worksheet (TW) Tab
4. Click most recent TW→ end date 12/31/21 TW→ Click save
5. Select (AGAIN) last end dated 12/31 TW→ click COPY→ Enter 1/1/22 start date and cert. end date → Calculate→ Save
6. Go to PA or refresh page if 2 tabs open→ Select Allocation tab→ Select most recent allocation line→ sync→ save
7. Click Add→ Select 1/1/22 allocation from drop down→ click on screen and click Calculate→ Check Affirmation & sign→ Save * Check amount of days don't exceed 365 total and service hours match prior allocation
8. Select Line Item Tab→ Select T2025 line→ Add T2025 from dropdown→ Enter End Date→ Click Save *SLS may have two T2025 lines to add (U8 and U8 SE)
9. Select Check Limits→ Submit PPA or resolve errors→ Complete Revision in FMS portal

Contact Info

CCM Help Desk
Bridge Issues or Questions
ccmhelpdesk@gainwelltechnologies.com

Participant Directed Programs Unit
General CDASS Questions
HCPF_pdp@state.co.us

Thank you!

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Department of Health Care Policy & Financing