Procedure Auth Review Job Aid

Table of Contents

Summary

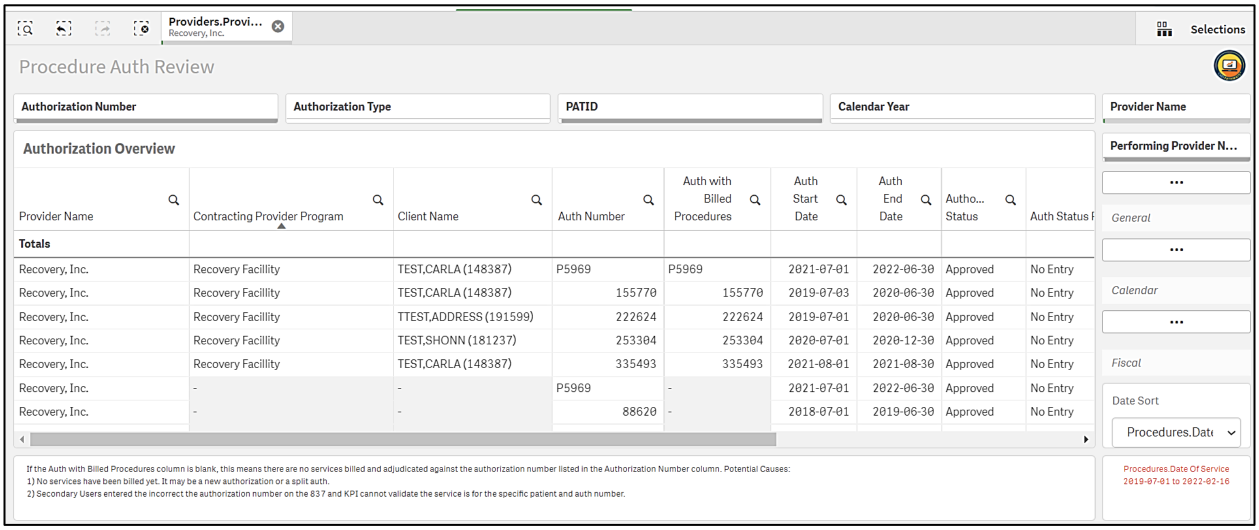
The Procedure Auth Review Sheet can be found in MSO KPI Dashboards 2.0 in the Community Section. It provides an overview of whether procedures have been billed against authorization numbers. This serves a few purposes. First, this sheet will provide an overview of the status by authorization. Secondly, it allows providers to know if an authorization has been billed against. This can be helpful to determine if a pending authorization has been billed against or if a correction to the authorization is needed, it will note how many services would need to get voided for the correction to occur. Thirdly, it is a troubleshooting tool for data discrepancies.

MSO KPI has security measures to prevent users from viewing unauthorized data. This process is achieved through validation of various data point against a patient's authorization. If any data point is missing/incorrect, KPI suppresses data. Secondary Sage Users are more susceptible to data discrepancy issues due to entry errors in their 837P/I file submission. However, if there is a mapping issue within Sage, Primary Sage Users may also experience data discrepancy issues.

Sheet Overview

No Protected Health Information (PHI) was used in the examples provided.

This sheet is comprised of four (4) sections: Filters, Authorization Overview, Disclaimers, and the Common Selector.



Filters

There are four (4) filters from which to drill down your selections.

Filter Options	
Name	**Description**
Authorization Number	This is the service authorization number. If you have a specific patient's services that are not visible in other sheets, you can check their authorization number to see if there are any billed services against it according to KPI. If there are no billed services against the auth number in KPI there may be a HIPAA issue that is leading KPI to suppress the data.
Authorization Type	There are two (2) options: 1. Contracting Provider Authorizations (aka P-AUTH) a. Keep in mind multiple patients will have the same P-AUTH number. If you don't see the name of the patient, that means KPI does not recognize that procedures have been billed against that auth number, which may be due to HIPAA security. 2. Member Authorizations
PATID	This is the patient's Sage client number. Single or multiple PATIDs may be selected.
Calendar Year	Authorizations are better searched by Calendar Year versus Fiscal Year as Fiscal Year is hard coded to search against billed procedures. Filtering by Fiscal Year will limit the results and may give an incorrect indication that an authorization doesn't exist.

Authorization Overview

The Authorization Overview object is a table indicating whether procedures have been billed against an authorization number and how many. This table can help troubleshoot data discrepancies. It can also give providers an indication of how many services may need to be voided should corrections need to be made to the authorization itself.

Authorization Overview

Provider Name	Contracting Provider Program	Client Name	Auth Number	Auth with Billed Procedures	Auth Start Date	Auth End Date	Authoriza... Status	Auth Status Reason	Auth Grouping	Client Count	Proced... Count
Totals										**3**	**79**
Recovery, Inc.	Recovery Facillity	TEST,CARLA (148387)	P5969	P5969	2021-07-01	2022-06-30	Approved	No Entry	RSS - 21 and Over	1	1
Recovery, Inc.	Recovery Facillity	TEST,CARLA (148387)	155770	155770	2019-07-03	2020-06-30	Approved	No Entry	ASAM OTP - 21 and Over	1	5
Recovery, Inc.	Recovery Facillity	TTEST,ADDRESS (191599)	222624	222624	2019-07-01	2020-06-30	Approved	No Entry	ASAM 1.0-AR - 12-17	1	63
Recovery, Inc.	Recovery Facillity	TEST,SHONN (181237)	253304	253304	2020-07-01	2020-12-30	Approved	No Entry	ASAM 1.0 - 21 and Over	1	9
Recovery, Inc.	Recovery Facillity	TEST,CARLA (148387)	335493	335493	2021-08-01	2021-08-30	Approved	No Entry	ASAM 2.1 - 21 and Over	1	1
Recovery, Inc.	-	-	P5969	-	2021-07-01	2022-06-30	Approved	No Entry	RSS - 21 and Over	0	0
Recovery, Inc.	-	-	88620	-	2018-07-01	2019-06-30	Approved	No Entry	ASAM 1.0 - 18-20	0	0
Recovery, Inc.	-	-	88855	-	2018-07-01	2019-03-01	Approved	No Entry	ASAM 1.0 - 18-20	0	0

Authorization Overview	
Column Name	**Description**
Provider Name	Name of Agency. SAPC staff will have access to all agencies. Providers will have access to the Agency with which they are associated.
Contracting Provider Program	Site location.
Client Name	This is a combination of the client's name and Sage number. Using the magnifying glass users may search by either name or PATID.
Auth Number	Authorization number.
Auth with Billed Procedures	If procedures have been billed against the auth number this field will duplicate the authorization number. If no procedures have been billed or if data is being suppressed this field will appear gray and have a dash.
Auth Start Date	This is the start date listed on the authorization.
Auth End Date	This is the end date listed on the authorization.
Authorization Status	This indicates one of three statuses: 1. Approved 2. Denied 3. Pending
Auth Status Reason	This reflects a field filled out by Utilization Management (UM) when reviewing authorizations. Typically, Approved authorizations will have "No Entry", however, if a correction to the authorization was requested there may be other reasons noted in this field.
Auth Grouping	This is the level of care noted on the Service Authorization.
Client Count	This is the number of unique clients who have had billed procedures against an authorization. If a patient had procedures billed to a P-AUTH and Member Auth, they could only be counted once in this field total.
Procedure Count	This reflects the number of procedures billed against the authorization number.

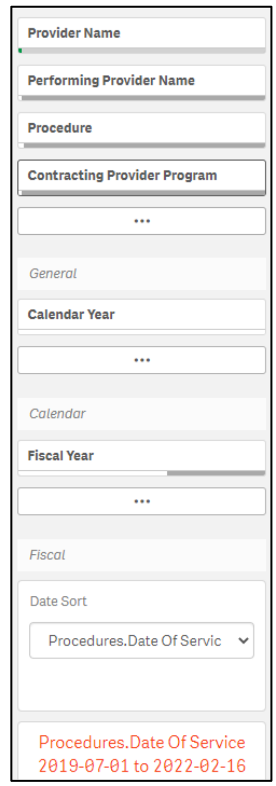
Note that on the bottom three rows of the above Authorization Overview snip, multiple columns are grayed out. This is an indication that KPI does not have a record of a service being billed or billed correctly against the authorization. If an adjudication of a service was received by the provider before the nightly load date (EOB, 835, visible in Sage Treatments), a help desk ticket should be opened to investigate the discrepancy.

Disclaimer

The text box object at the bottom of the sheet notes disclaimers as to why data may appear blank on the Authorization Overview object.

> If the Auth with Billed Procedures column is blank, this means there are no services billed and adjudicated against the authorization number listed in the Authorization Number column. Potential Causes:
> 1) No services have been billed yet. It may be a new authorization or a split auth.
> 2) Secondary Users entered the incorrect the authorization number on the 837 and KPI cannot validate the service is for the specific patient and auth number.

Common Selector



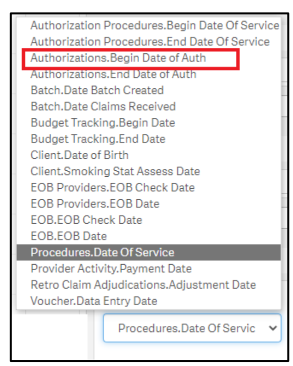
The right-hand side of the sheet has the common selectors which are available on most sheets. If additional drill down is needed, the common selector menu provides a shortcut to adding filters.

Within in each selector there are various field from which to choose for more specificity. The Common Selector options may be obstructed by the size of your screen, and they may need to be right clicked or hovered over the ellipses to see the available options.

General contains: Provider Name, Performing Provider Name, Procedure, Contracting Provider Program, Authorization Status, Authorization Type, Authorization Number, Claim ID, Contracting Provider Program Link, Client ID, and Client Status.

Calendar Year contains: Calendar Year, Calendar Quarter, Calendar Half, Month, Calendar Year-Half, Calendar Year-Quarter, Calendar Year-Month, Calendar Year-Week, Date.

Fiscal Year contains: Fiscal Year, Fiscal Half, Fiscal Quarter, Fiscal Year.Month Abbreviation, Fiscal Month number, Fiscal Year-Half, Fiscal Year-Month, Fiscal Year-Quarter.



Date Sort: This field defaults to Procedures.Date of Service on all Sheets. For the Procedure Auth Review Sheet, change it to Authorizations.Begin Date of Auth. This will provide a more accurate results based on the date of the auth and not based on when a procedure took place.