Agency – Medicaid Patients Switching to Managed Care Payor 3/22/24
DO NOT CREATE MODIFICATIONS
Please follow these steps if you have a Medicaid patient that is converting to Managed Care.

- **Open the patient's chart.**

- **Click on Edit Patient**

- **Under Patient Payors, Click Add**

- **Under Edit Patient Payor**
  - Select one of the three new MCD payors. We are selecting "Aetna MCD" for this example.
  - Enter the Payor ID (Medicaid #) for this payor.
  - Effective Date: 04/01/2024
  - Change the priority to 200
  - Click Ok

- **Under Patient tab you will need to have both payors listed so we can have the ability to check eligibility after 4/1/24.**
  - o **OK Medicaid – Priority: 100 Expires: 03/31/2024**
  - o **Aetna MCD – Priority: 200 Effective: 04/01/2024 Expires: 12/31/9999**
  - o **Click Ok**

- **Under Txplans tab, Click on the Draft Txplan button.**

- **Select Aetna MCD, Click Ok**
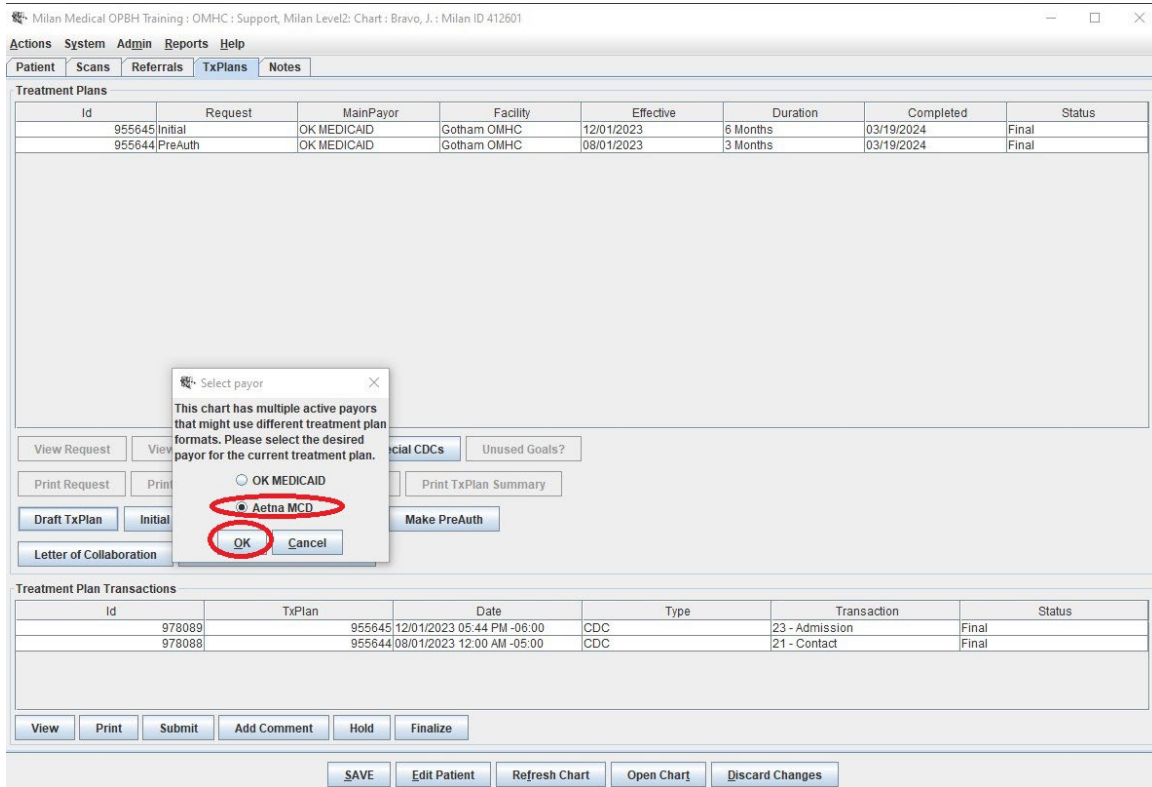
- **The data importer screen will populate since there is no data entered for this payor.**
  - **Medicaid should be selected for this import.**
  - **Please make sure you put a check to import data from all remaining tabs to ensure that all data gets transferred to the Aetna MCD payor.**
  - **Click Import**
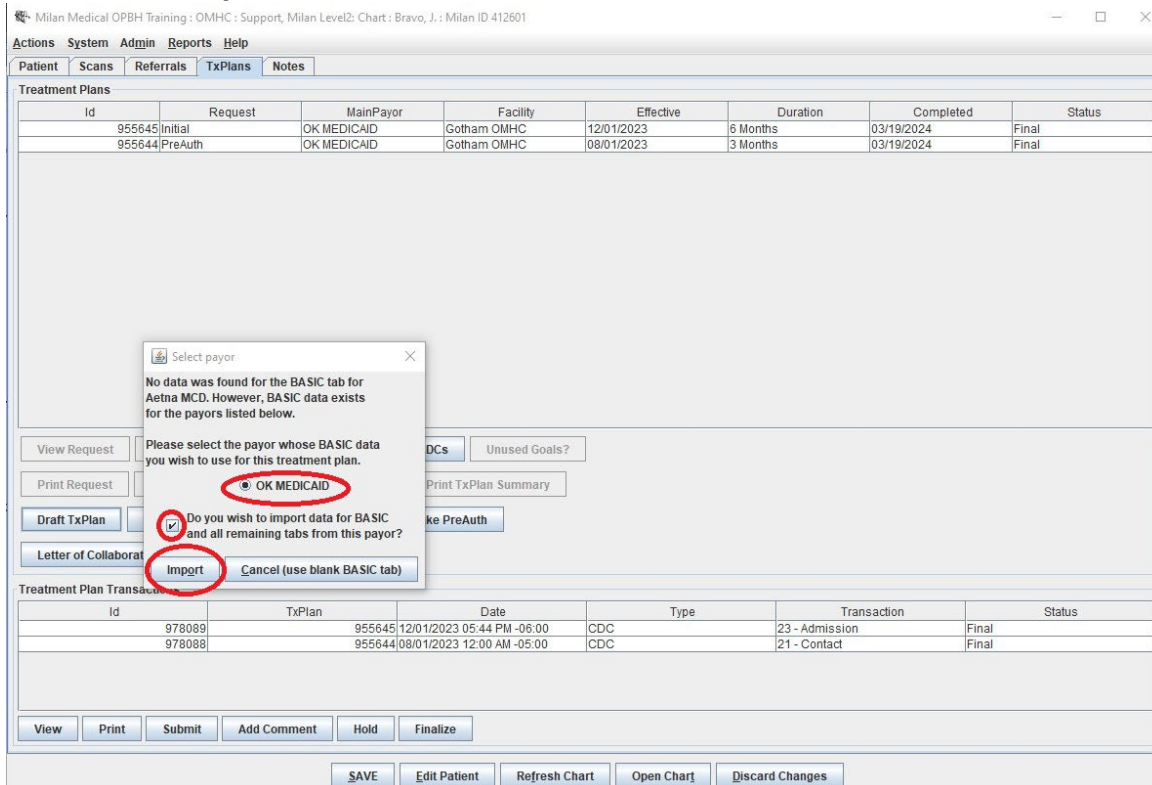
- **The draft txplan information will appear now. Click on the Basic tab.**

- **Under the Basic tab, Change the Service Focus to "Non-ODMHSAS/OHCA Funded", Click Ok**

- **Click Save**

You are now ready to create the txplan with the Aetna MCD payor. <u>DO NOT CREATE A MODIFICATION.</u> You will need to create an Initial txplan with the new payor, but you will change the expiration date to match the last txplan expiration date. Below are the steps to create the txplan.

- **Double-click on the last txplan to see the expiration date. On this example the expiration date for the previous txplan is 05/31/2024. Remember this date since we will need it when we are preapproving the txplan.**

- **Click on the Initial button.**

- **You will get a warning that indicates there is a valid txplan. You will click on the Yes.**

- **You will select Aetna MCD payor, Click the Ok button.**

- **The draft txplan that you imported will pop up. Click Ok.**

- **Under the New Prior Auth Screen**
  - **Effective: 04/01/2024**
  - **Select Facility 1 & Facility 2**
  - **Select Main Payor: Aetna MCD**
  - **Level: The CAR/ASI scores determined the previous level. In this example it was Level 3. If you want the unit allocation to be like what you had before you would select "Manage Care 3"**
    - **NOTE: All Managed Care Payors will need to have a Managed Care level selected. This will not auto-populate. You will need to manually select a Managed Care Level.**
      - **Managed Care 1 (Similar to Level 1) ($623/month)**
      - **Managed Care 2 (Similar to Level 2) ($815/month)**
      - **Managed Care 3 (Similar to Level 3) ($867/month)**
      - **Managed Care 4 (Similar to Level 4) ($1171/month)**
      - **Managed Care High ($2500/month)**
  - **Highlight all the Medicaid authorizations and click on the delete button.**
  - **Delete any Aetna MCD authorizations you don't need.**
  - **For the Aetna MCD authorizations you keep, be sure to double-click on them so you can assign a therapist for each authorization.**
  - **Click Ok**

- **You will get a maximize pop-up. Click Yes**

- **Click Save**

- **You will highlight the txplan request in proposed status and click on the Complete button.**

- **Click Save**

- **Click on the txplan request in completed status and click on the Preapprove button.**

- **You will receive a warning that indicates there are no Medicaid authorizations. You will click on the Ok button.**

- **On the Prior Auth screen**
  - **Update the Expires date at the top right to match the Expires date of the previous txplan. On this example, we will change the expires date to 05/31/2024.**
  - **Update the Through date on the authorizations by double-clicking on an authorization and changing the date to 05/31/2024**
  - **Click Ok**

  - **You will get a message that asks if you want to update all of the authorization dates. Click Yes.**

- **Click Ok**

- **Click Save**

- **Click on the txplan request in preapproved status. You will click on the Finalize button.**

- **You will click Save.**