

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.**

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Cockpit

Actions System Admin Reports Help

Notices Cockpit Groups

Facility: *ANY*

Therapist: *ANY*, *ANY*

Name: [Text Box]

View All Reset

Bravo, Johnny
Cobblepot, Oswald Chesterfield
Doe, Jane
Duck, Donald
Fries, Victor
Isley, Pamela
Kyle, Selina
Maldonado, Joseph
Test, Speed
Unknown, Name

Open Chart New Note
Edit Patient New Patient

Treatment Plans							
	Days	#	Days	#	Days	#	
Missing	NoTxPlan	1	NoPartial	1	Ineligible	2	
TPR	15-28	0	8-14	0	0-7	2	
Proposed	0-6	0	7-13	0	14 or more	3	
Completed	0-1	0	2-3	0	4 or more	0	
Submitted	0-3	0	4-8	0	9 or more	4	
Draft CDC	0-6	0	7-13	0	14 or more	0	
CDUW	0-1	0	2-3	0	4 or more	1	
Pending	0-3	0	4-8	0	9 or more	0	
PALJW	0-1	0	2-3	0	4 or more	0	
Preapproved	0-6	0	7-13	0	14 or more	0	

Progress Notes							
	Days	#	Days	#	Days	#	
Missing	Note30	1	Note60	0	Note90	2	
Rejected	0-3	0	4-6	0	7 or more	0	
Draft	0-1	0	2-3	0	4 or more	13	
Signed	0-3	0	4-6	0	7 or more	0	
Approved	0-6	0	7-13	0	14 or more	0	

Miscellaneous							
	Days	#	Days	#	Days	#	
Credentials	15-28	0	1-14	0	Expired	1	
Posted	0-6	0	7-13	0	14 or more	0	
Billed	0-13	0	14-27	0	28 or more	0	
UserWait	0-6	0	7-13	0	14 or more	1	

- **Click on Edit Patient**

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Services

Id	Rv	Facility	Therapist	Service	Status	Start	Flags	Minutes
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New View All View/Edit Sign Print Delete Undelete Approve Flag Reject Unreject Comment

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

- **Under Patient Payors, Click Add**

Bravo, Johnny

Patient Information

First: Johnny Middle: Last: Bravo Maiden: Suffix: NONE

BirthDate: 02/15/1980 SSN: 414141414 Gender: Male FullChart: Required Milan ID: 412601

Provider: OMHC Record ID: Flags: GENERIC OVERLAP DUPLICATE ALLOWREHAB LOCKUSAGE BLOCKNEWNOTES

Comments: AltID: AltID Type:

Patient Programs

Program	Discharge Reason	Admit Date	Discharge Date	Last Modified by
Gotham City MH	Not Discharged	08/01/2023	12/31/9999	Support, Milan

Patient Facilities

Facility	Effective	Expires
Gotham OMHC	08/01/2023	12/31/9999

Patient Therapists

Therapist	PA Role	Effective	Expires
Crane, Jonathan	Both	08/01/2023	12/31/9999

Patient Payors

Payor	Effective	Expires	Priority	Payor ID	Referring NPI	Plan Name	Account4
OK MEDICAID	08/01/2023	03/31/2024	100	B010101010			

Patient Service Locations

Service Location	Type	Effective	Expires
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OK Cancel

- 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

Bravo, Johnny

Patient Information

First: Johnny Middle: Last: Bravo Maiden: Suffix: NONE

BirthDate: 02/15/1980 SSN: 414141414 Gender: Male FullChart: Required Milan ID: 412601

Provider: OMHC Record ID: Flags: GENERIC OVERLAP DUPLICATE ALLOWREHAB LOCKUSAGE BLOCKNEWNOTES

Address:

Edit Patient Payor

Patient

Payor: **Aetna MCD** Copay: 0 Percent: 100

Relation: Self First Name: JOHNNY Last Name: BRAVO

Priority: **200** Payor ID: **B010101010**

Account4: Effective: **04/01/2024** Expires: 12/31/9999

Referring Physician: Referring Physician NPI:

Insured

Phone: First Name: Last Name:

Plan Name: Employer: Group Name:

Address: City: State:

ZIP: DOB: Sex:

Other Insured

Other Plan: No First Name: Last Name:

Plan Name: Employer: Group Name:

DOB: Sex:

OK Cancel

Patient Service Locations

Service Location	Type	Effective	Expires
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OK Cancel

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

Bravo, Johnny

Patient Information

First: Johnny Middle: Last: Bravo Maiden: Suffix: NONE

BirthDate: 02/15/1980 SSN: 414141414 Gender: Male FullChart: Required Milan ID: 412601

Provider: OMHC Record ID: Flags: GENERIC OVERLAP DUPLICATE ALLOWREHAB LOCKUSAGE BLOCKNEWNOTES

Comments: AIID: AIID Type:

Patient Programs

Program	Discharge Reason	Admit Date	Discharge Date	Last Modified by
Gotham City MH	Not Discharged	08/01/2023	12/31/9999	Support, Milan

Patient Facilities

Facility	Effective	Expires
Gotham OMHC	08/01/2023	12/31/9999

Patient Therapists

Therapist	PA Role	Effective	Expires
Crane, Jonathan	Both	08/01/2023	12/31/9999

Patient Payors

Payor	Effective	Expires	Priority	Payor ID	Referring NPI	Plan Name	Account4
OK MEDICAID	08/01/2023	03/31/2024	100	B010101010			
Aetna MCD	04/01/2024	12/31/9999	200	B010101010			

Patient Service Locations

Service Location	Type	Effective	Expires
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OK Cancel

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

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

View Request View TxPlan Add Comment Special CDCs Unused Goals?

Print Request Print TxPlan Print Request Summary Print TxPlan Summary

Draft TxPlan Initial Extension Modification Make PreAuth

Letter of Collaboration Contest/Courtesy Termination

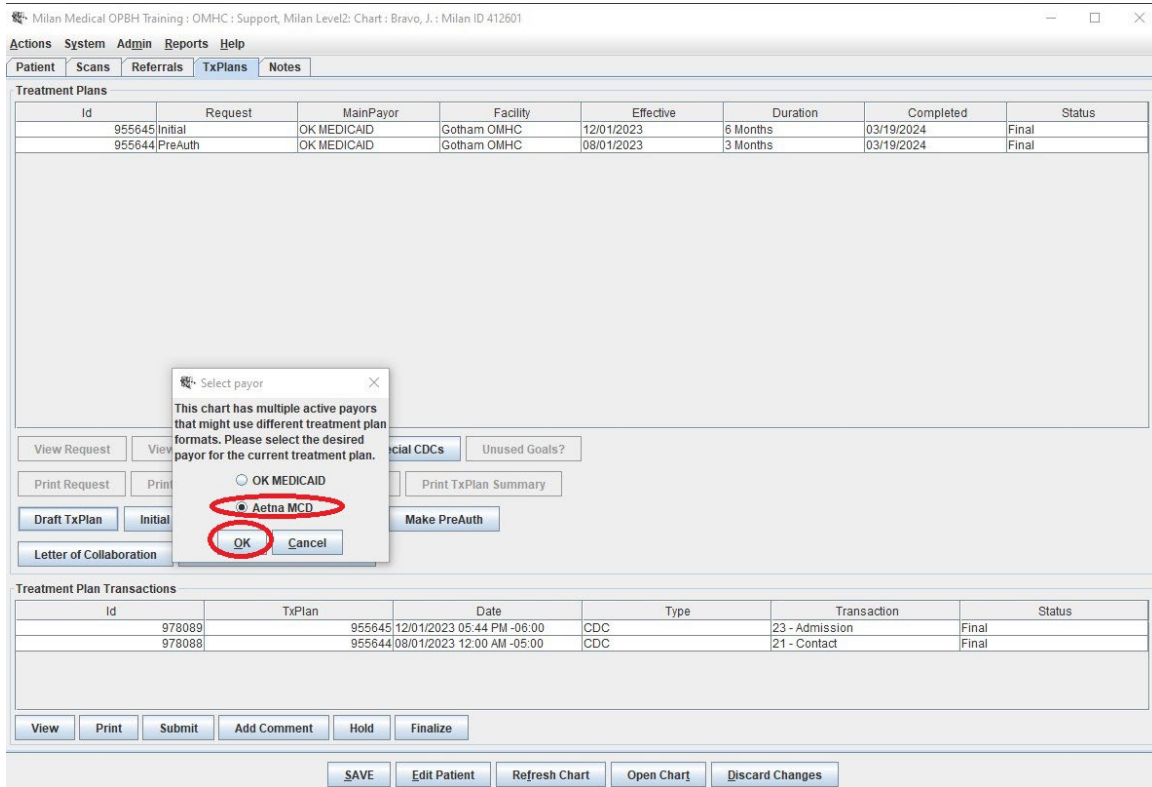
Treatment Plan Transactions

Id	TxPlan	Date	Type	Transaction	Status
978089	955645	12/01/2023 05:44 PM -06:00	CDC	23 - Admission	Final
978088	955644	08/01/2023 12:00 AM -05:00	CDC	21 - Contact	Final

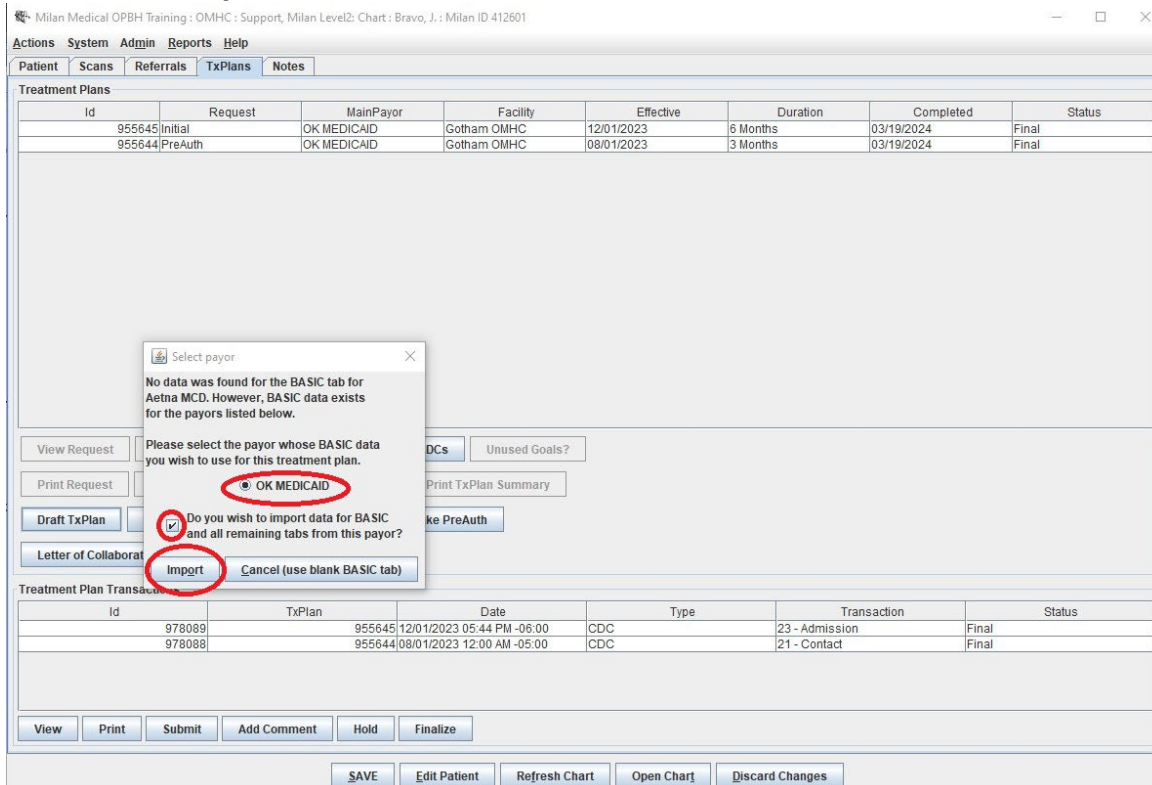
View Print Submit Add Comment Hold Finalize

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

- **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.

TxPlan for Bravo, Johnny - Milan ID 412601

Basic Residence Diagnosis CAR BasicCDC ASI Testing Addendum Goals

Interpretive Summary
asdfasdfasdf

Internal Comments

Problem	Goal	Impairment
Social Skills	Learn Social Skills	Moderate

View New Up Down Delete Import

OK Spell Check Cancel

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

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

TxPlan for Bravo, Johnny - Milan ID 412601

Basic Residence Diagnosis CAR BasicCDC ASI Testing Addendum Goals

Basic Information

Emergency Contact [] Emergency Number [] Highest Grade []

Guardian Type: None Guardian Name [] Guardian Relation []

Marital Status: Married TX Years: Unknown Military Status: None

Preferred Lang: English Speaks English Well: Yes

Admissions: [] ER Admissions: [] Lead Therapist: Crane, Jonathan

Youth Suspensions: [] Youth Runaways: [] *SERVICE FOCUS: Non-ODMHSAS/OHCA Funded

*RACE: White American Indian Asian African American Hispanic Pacific Islander Other

Misc: Special Ed In School Probation

Screening

*MENTAL HEALTH: Positive *SUBSTANCE: Not administered *TRAUMA: Not administered Gambling: Not administered

Trauma Score [] ACE Score: 4 *HARMFUL INTENT: N/A

Alerts

Acquired Brain Injury Alcohol/Substance Addiction Dementia Developmental Disability

Dual Diagnosis - AOD/DD Dual Diagnosis - AOD/MH Dual Diagnosis - MH/DD Hearing Impairment

HIV-Positivity/AIDS Homelessness Case Management Mental Disorder

New Immigrant Physical Disability Un-/Underemployment Visual Impairment

Other Addiction Unknown CDC []

CDC Referrals

*PRIMARY: Self Agency NPI []

*SECONDARY: None Agency NPI []

Family ID, DOC # or DHS Case Number []

OK Spell Check Cancel

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

- Click Save

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J.: Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

View Request View TxPlan Add Comment Special CDCs Unused Goals?

Print Request Print TxPlan Print Request Summary Print TxPlan Summary

Draft TxPlan Initial Extension Modification Make PreAuth

Letter of Collaboration Contest/Courtesy Termination

Treatment Plan Transactions

Id	TxPlan	Date	Type	Transaction	Status
978089	955645	12/01/2023 05:44 PM -06:00	CDC	23 - Admission	Final
978088	955644	08/01/2023 12:00 AM -05:00	CDC	21 - Contact	Final

View Print Submit Add Comment Hold Finalize

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

You are now ready to create the txplan with the Aetna MCD payor. **DO NOT CREATE A MODIFICATION.** 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.

Milan Medical OPBH Training : PriorAuth #955645 for Bravo, Johnny

Actions System Admin Reports

Patient Scans Referrals

Treatment Plans

Status: Final Facility1: Gotham OMHC Facility2: Gotham OMHC

Level: Level III MainPayor: OK MEDICAID Duration: 6 Months

Writer: Support, Milan Level2 Contact: Perez, Joe Request: Initial

TxPlan Type: Mental Health Reviewer: Completed: 03/19/2024

Submitted: 03/19/2024 05:45 PM Effective: 12/01/2023 05:44 PM Expires: **05/31/2024**

Public Comments

Review Comments

System Comments: Request Finalized By Perez, Joe On 03/19/2024 Request Preapproved By Perez, Joe On 03/19/2024 Upload aborted, missing or invalid therapist NPI for payor

Authorizations

Id	Payor	Bundle	Service	Therapist	Propo.	Granted	PA#	From	Through	Status	UW
3933628	OK MEDICAID	PG048	Psychotherapy MH - Individual (Adult SUP	Crane, Jonathan	71	71	1234567890	12/01/2023	05/31/2024	Approved	✓
3933629	OK MEDICAID	PG048	Psychotherapy MH - Individual (Adult) HO	Crane, Jonathan	71	70	1234567890	12/01/2023	05/31/2024	Approved	✓
3933630	OK MEDICAID	PG048	Psychotherapy MH - Individual Telemedic.	Crane, Jonathan	71	71	1234567890	12/01/2023	05/31/2024	Approved	✓
3933631	OK MEDICAID	PG048	Psychotherapy MH - Individual Telemedic.	Crane, Jonathan	71	69	1234567890	12/01/2023	05/31/2024	Approved	✓
3933632	OK MEDICAID	PG048	Treatment Plan MH - Low Complexity (Ad.	Crane, Jonathan	1	1	1234567890	12/01/2023	05/31/2024	Approved	✓

Edit New Show empty usages Show Notes Edit Extent

Usage

Id	Auth	Extent	EP	Payor	Code	From	Thru	Granted	Total	Paid	Unpaid
978089											
978088											

View Print Submit OK Cancel

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

- Click on the Initial button.

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

View Request View TxPlan Add Comment Special CDCs Unused Goals?

Print Request Print TxPlan Print Request Summary Print TxPlan Summary

Draft TxPlan **Initial** Extension Modification Make PreAuth

Letter of Collaboration Contest/Courtesy Termination

Treatment Plan Transactions

Id	TxPlan	Date	Type	Transaction	Status
978089	955645	12/01/2023 05:44 PM -06:00	CDC	23 - Admission	Final
978088	955644	08/01/2023 12:00 AM -05:00	CDC	21 - Contact	Final

View Print Submit Add Comment Hold Finalize

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

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

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

View Request View TxPlan Add Comment

Print Request Print TxPlan Print Request Summary Print TxPlan Summary

Draft TxPlan **Initial** Extension Modification Make PreAuth

Letter of Collaboration Contest/Courtesy Termination

Treatment Plan Transactions

Id	TxPlan	Date	Type	Transaction	Status
978089	955645	12/01/2023 05:44 PM -06:00	CDC	23 - Admission	Final
978088	955644	08/01/2023 12:00 AM -05:00	CDC	21 - Contact	Final

View Print Submit Add Comment Hold Finalize

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

Warning!

There appears to be a prior valid treatment plan with an expiration date within the past year. Are you sure you wish to create another initial treatment plan?

Yes No

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

Milan Medical OPBH Training - OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

Select payor

This chart has multiple active payors that might use different treatment plan formats. Please select the desired payor for the current treatment plan.

OK MEDICAID

Aetna MCD

OK Cancel

View Request View TxPlan Add Comment

Print Request Print TxPlan Print Request

Draft TxPlan Initial Extension Mod

Letter of Collaboration Contest/Courtesy Termination

Treatment Plan Transactions

Id	TxPlan	Date	Type	Transaction	Status
978089	955645	12/01/2023 05:44 PM -06:00	CDC	23 - Admission	Final
978088	955644	08/01/2023 12:00 AM -05:00	CDC	21 - Contact	Final

View Print Submit Add Comment Hold Finalize

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

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

Milan TxPlan for Bravo, Johnny - Milan ID 412601

Actions Basic Residence Diagnosis CAR BasicCDC ASI Testing Addendum Goals

Patient Interpretive Summary

Treatme asdfasdfas df

Internal Comments

Problems

Problem	Goal	Impairment
Social Skills	Learn Social Skills	Moderate

View New Up Down Delete Import

OK Spell Check Cancel

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

- 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

Authorizations

Id	Payor	Bundle	Service	Therapist	Pro...	Gra...	PA#	From	Through	Status	UW
0	Aetna MCD	MCE03	Psychotherapy MH - Individual (Adult S...		0	0				Request...	✓
0	Aetna MCD	MCE03	Psychotherapy MH - Individual (Adult) ...		0	0				Request...	✓
0	Aetna MCD	MCE03	Psychotherapy MH - Individual Teleme...		0	0				Request...	✓
0	Aetna MCD	MCE03	Psychotherapy MH - Individual Teleme...		0	0				Request...	✓
0	Aetna MCD	MCE03	Treatment Plan MH - Low Complexity (...)		0	0				Request...	✓
0	OK MEDICAID	NONE	Psychotherapy MH - Individual (Adult S...		0	0				Request...	✓
0	OK MEDICAID	NONE	Psychotherapy MH - Individual (Adult) ...		0	0				Request...	✓
0	OK MEDICAID	NONE	Psychotherapy MH - Individual Teleme...		0	0				Request...	✓
0	OK MEDICAID	NONE	Psychotherapy MH - Individual Teleme...		0	0				Request...	✓
0	OK MEDICAID	NONE	Treatment Plan MH - Low Complexity (...)		0	0				Request...	✓

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

New PriorAuth for Bravo, Johnny

Status: Proposed Facility1: Gotham OMHC Facility2: Gotham OMHC

Level: Managed Care 3 MainPayor: Aetna MCD Duration: 6 Months

Writer: Support, Milan Level2 Contact: Perez, Joe Request: Initial

Treatment TxPlan Type: Mental Health Reviewer: Completed: Effective: 04/01/2024 12:00 AM Expires:

Public Comments

Review Comments

System Comments: Request Created By Perez, Joe On 03/20/2024

Authorizations

Id	Payor	Br	From	Throu...	Stat...	UW
0	Aetna MCD	MCE0			Re...	✓
0	Aetna MCD	MCE0			Re...	✓
0	Aetna MCD	MCE0			Re...	✓
0	Aetna MCD	MCE03	Psychotherapy MH - Individual Telemedicine (Adult) H0004HE...	Crane, Jon...	1	0
0	Aetna MCD	MCE03	Treatment Plan MH - Low Complexity (Adult) H0032HETF	Crane, Jon...	1	0

Buttons: Edit, New, Clone, Delete, OK, Cancel

Bottom Bar: View, Print, Submit, Add Comment, Hold, Finalize, SAVE, Edit Patient, Refresh Chart, Open Chart, Discard Changes

- Click Save

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final
0	Initial	Aetna MCD	Gotham OMHC	04/01/2024	6 Months		Proposed

Buttons: View Request, View TxPlan, Add Comment, Special CDCs, Unused Goals?, Print Request, Print TxPlan, Print Request Summary, Print TxPlan Summary, Draft TxPlan, Initial, Extension, Modification, Make PreAuth, Letter of Collaboration, Contest/Courtesy Termination

Treatment Plan Transactions

Id	TxPlan	Date	Type	Transaction	Status
978089	955645	12/01/2023 05:44 PM -06:00	CDC	23 - Admission	Final
978088	955644	08/01/2023 12:00 AM -05:00	CDC	21 - Contact	Final

Buttons: View, Print, Submit, Add Comment, Hold, Finalize, SAVE, Edit Patient, Refresh Chart, Open Chart, Discard Changes

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

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955646	Initial	Aetna MCD	Gotham OMHC	04/01/2024	6 Months		Proposed
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

Edit Request Edit TxPlan Add Comment Special CDCs Unused Goals? **Complete**

Print Request Print TxPlan Print Request Summary Print TxPlan Summary

Draft TxPlan Initial Extension Modification Make PreAuth

Letter of Collaboration Contest/Courtesy Termination

Treatment Plan Transactions

Id	TxPlan	Date	Type	Transaction	Status
978089	955645	12/01/2023 05:44 PM -06:00	CDC	23 - Admission	Final
978088	955644	08/01/2023 12:00 AM -05:00	CDC	21 - Contact	Final

View Print Submit Add Comment Hold Finalize

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

- Click Save

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955646	Initial	Aetna MCD	Gotham OMHC	04/01/2024	6 Months		Proposed
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

Edit Request Edit TxPlan Add Comment Special CDCs Unused Goals? Preapprove Uncomplete

Print Request Print TxPlan Print Request Summary Print TxPlan Summary

Draft TxPlan Initial Extension Modification Make PreAuth

Letter of Collaboration Contest/Courtesy Termination

Treatment Plan Transactions

Id	TxPlan	Date	Type	Transaction	Status
978089	955645	12/01/2023 05:44 PM -06:00	CDC	23 - Admission	Final
978088	955644	08/01/2023 12:00 AM -05:00	CDC	21 - Contact	Final

View Print Submit Add Comment Hold Finalize

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

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

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955646	Initial	Aetna MCD	Gotham OMHC	04/01/2024	6 Months	03/20/2024	Completed
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

Treatment Plan Transactions

Id	TxPlan	Date	Type	Transaction	Status
978089	955645	12/01/2023 05:44 PM -06:00	CDC	23 - Admission	Final
978088	955644	08/01/2023 12:00 AM -05:00	CDC	21 - Contact	Final

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

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955646	Initial	Aetna MCD	Gotham OMHC	04/01/2024	6 Months	03/20/2024	Completed
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

Warning

This patient has the following payors but no authorizations for them:
OK MEDICAID

Treatment Plan Transactions

Id	TxPlan	Date	Type	Transaction	Status
978089	955645	12/01/2023 05:44 PM -06:00	CDC	23 - Admission	Final
978088	955644	08/01/2023 12:00 AM -05:00	CDC	21 - Contact	Final

- 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

The screenshot shows the 'PriorAuth #955646 for Bravo, Johnny' screen. The 'Expires' field at the top right is highlighted with a red box and contains the date 05/31/2024. An 'Authorization Editor' dialog box is open in the foreground, showing 'Psychotherapy MH - Individual (Adult SUP) H0004HE' as the service. The 'Through' date is set to 05/31/2024 and is also highlighted with a red box. The 'OK' button at the bottom of the dialog is circled in red.

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

The screenshot shows the same 'PriorAuth #955646 for Bravo, Johnny' screen. A confirmation dialog box titled 'Update Remaining Authorizations' is open. It contains the text: 'The Effective, Expires, and PANum must match for all Authorizations in the same bundle. Update remaining Authorizations to match?'. The 'Yes' button is circled in red.

- Click Ok

Milan Medical OPBH Training - PriorAuth #955646 for Bravo, Johnny

Status: **Preapproved** Facility1: **Gotham OMHC** Facility2: **Gotham OMHC**
 Level: **Managed Care 3** MainPayor: **Aetna MCD** Duration: **6 Months**
 Writer: **Support, Milan Level2** Contact: **Perez, Joe** Request: **Initial**
 TxPlan Type: **Mental Health** Reviewer: **[Empty]** Completed: **03/20/2024**
 Submitted: **03/20/2024 03:55 PM** Effective: **04/01/2024 12:00 AM** Expires: **05/31/2024**

Public Comments

Review Comments

System Comments
 Request Preapproved By Perez, Joe On 03/20/2024
 Request Submitted By Perez, Joe On 03/20/2024
 Request Completed By Perez, Joe On 03/20/2024

Authorizations

Id	Payor	Bundle	Service	Therapist	Pro...	Gra...	PA#	From	Through	Status	UW
3933633	Aetna MCD	MCE03	Psychotherapy MH - Individual (Adult S...	Crane, Jonathan	71	71	--n/a--	04/01/2024	05/31/2024	Approved	✓
3933634	Aetna MCD	MCE03	Psychotherapy MH - Individual (Adult)...	Crane, Jonathan	71	71	--n/a--	04/01/2024	05/31/2024	Approved	✓
3933635	Aetna MCD	MCE03	Psychotherapy MH - Individual Teleme...	Crane, Jonathan	71	71	--n/a--	04/01/2024	05/31/2024	Approved	✓
3933636	Aetna MCD	MCE03	Psychotherapy MH - Individual Teleme...	Crane, Jonathan	71	71	--n/a--	04/01/2024	05/31/2024	Approved	✓
3933637	Aetna MCD	MCE03	Treatment Plan MH - Low Complexity (...)	Crane, Jonathan	1	1	--n/a--	04/01/2024	05/31/2024	Approved	✓

Treatment Plan Transactions

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955646	Initial	Aetna MCD	Gotham OMHC	04/01/2024	6 Months	03/20/2024	Preapproved
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

- Click Save

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help
 Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955646	Initial	Aetna MCD	Gotham OMHC	04/01/2024	6 Months	03/20/2024	Preapproved
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

Treatment Plan Transactions

Id	TxPlan	Date	Type	Transaction	Status
978089	955645	12/01/2023 05:44 PM -06:00	CDC	23 - Admission	Final
978088	955644	08/01/2023 12:00 AM -05:00	CDC	21 - Contact	Final

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

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955646	Initial	Aetna MCD	Gotham OMHC	04/01/2024	6 Months	03/20/2024	Preapproved
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

View Request View TxPlan Add Comment Special CDCs Unused Goals? **Finalize**

Print Request Print TxPlan Print Request Summary Print TxPlan Summary

Draft TxPlan Initial Extension Modification Make PreAuth

Letter of Collaboration Contest/Courtesy Termination

Treatment Plan Transactions

Id	TxPlan	Date	Type	Transaction	Status
978089	955645	12/01/2023 05:44 PM -06:00	CDC	23 - Admission	Final
978088	955644	08/01/2023 12:00 AM -05:00	CDC	21 - Contact	Final

View Print Submit Add Comment Hold Finalize

SAVE Edit Patient Refresh Chart Open Chart Discard Changes

- You will click Save.

Milan Medical OPBH Training : OMHC : Support, Milan Level2: Chart : Bravo, J. : Milan ID 412601

Actions System Admin Reports Help

Patient Scans Referrals TxPlans Notes

Treatment Plans

Id	Request	MainPayor	Facility	Effective	Duration	Completed	Status
955646	Initial	Aetna MCD	Gotham OMHC	04/01/2024	6 Months	03/20/2024	Final
955645	Initial	OK MEDICAID	Gotham OMHC	12/01/2023	6 Months	03/19/2024	Final
955644	PreAuth	OK MEDICAID	Gotham OMHC	08/01/2023	3 Months	03/19/2024	Final

View Request View TxPlan Add Comment Special CDCs Unused Goals?

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Treatment Plan Transactions

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View Print Submit Add Comment Hold Finalize

SAVE Edit Patient Refresh Chart Open Chart Discard Changes