

How to Create a Client Prior Authorization (CPA)

The Client Prior Authorization (CPA) is used to authorize a provider to deliver services for an individual. The CPA is created and submitted by the Case Management Entity (CME) and must reach **Accepted** status before a provider can submit claims for payment.

Users must have one of the following roles to complete this work:

- CPA Manager
- CPA Preparer

To create a CPA in eXPRS:

- 1. Login to eXPRS. If you have multiple **Organization/Program Areas**, use the appropriate role for the work you are doing.
- 2. Select **Prior Authorization > Client Prior Auth > Create CPA**.

| Oregon Department of Human Services Express Payment & Reporting System (eXPRS) | | | | | | | | | | |
|---|------------|-------------------------------|----------------|----------|-------------|--------|--------------|----------|--------------|---------|
| O YDRC | r | Home | My Account | Change | Password | Help 🔻 | Lo | g Out | | |
| Express Payment & Reporti | ng Sy | stem County (Local Authority) | | | | Switch | | | | |
| Client | • | Home | | | | | | | | |
| Provider | • | | | | | | | | | |
| Contracts | | My Notifica | tions | _ | | | | | | |
| Prior Authorization |) 5 | Service Elem | ent Prior Auth | • | | | | | | |
| Claims | → F | ^o rovider Pric | or Auth | Notifica | ation Types | | | - | Include Re | moved 🗆 |
| CM/PA TCM Billing | • | Client Prior A | Auth | Find Cl | PA | | | | | |
| Liabilities | → F | Reports | | ▶ Create | CPA | | > | | | |
| Reports | ۲. | | | Mass F | ⊃rocess CPA | s | _ | | | |
| Financial Maintenance | Þ | | Desc | ription | | ÷ | Updat Dat | ted e | Updated By 💠 | Done 🗆 |

3. The **Create Client Prior Authorization** page has five sections. In Section 1 search for or enter the **Client Prime** and then select **Next**.

| Create Client Prior Authorization | | | | | | |
|-----------------------------------|-------------------------------------|------|--|--|--|--|
| Client P | rior Authorization: - Status: Draft | | | | | |
| 57 | Client to be Served: | | | | | |
| | Client Prime: XYZ0000A | Next | | | | |

4. In Section 2, select the **Service Element, Proc Code** and **Svc Modifier Code** for the service needed, then select **Next**.



5. In Section 3, Select the **Provider ID** for the provider of the service, then select the **Next** button to access more fields that apply to the service. Complete these fields (which may vary depending on the service), and select the **Next** button to move to Section 4.

| 2 | | Provider of Service | 9: | | | | | |
|----------------------|-------------------------------|--------------------------|--------------|------|--|--|--|--|
| \mathcal{D} | Provide | r ID | ~ | Next | | | | |
| | | | | | | | | |
| Provider of Service: | | | | | | | | |
| | Provider: | Case Management Provider | Provider ID: | | | | | |
| | Address: | | Phone: | | | | | |
| 5 | City/State: | | | | | | | |
| 5 | Brokerage Request Date: | | | | | | | |
| | Assigned Brokerage: | CDDP CM only | ✓ N | ext | | | | |

6. In Section 4, select the **DHS Contract Number** that applies for the service, and then select **Next** to move to Section 5.

| Ą | DHS Contract Funding Services: | | | | | | | | |
|---|--------------------------------|----------|------|--|--|--|--|--|--|
| | DHS Contract Num: | County 🗸 | Next | | | | | | |
| _ | | | | | | | | | |

 In Section 5, enter the Effective Date (the first date of service authorization) and the End Date (the last date of the service authorization) for the individual's service, then select Next.



Tip: If the service is expected to be ongoing, enter the last day of the biennium in the **End Date** field and select **"Y"** in the **Ongoing:** field. If not, select the appropriate **End Date** and **"N"**.

- 8. Enter information into the **Unit Type**, **Units**, and **Rate** for the service (this may auto-fill depending on the service).
- 9. Add notes (if needed), and then select Next.

| | Rate and Duration of Services: | | | | | | | | | |
|---|--------------------------------|--------------------|-------|-----------|----------------|----------|--------|---------|-----|--|
| | Effective Date: | 07/01/202 | 1 | End Da | te: 06/ | 30/2023 | | Ongoin | g:Y | |
| | Unit Type: | Days | | Uni | i ts: 1 | | | | | |
| 5 | Notes: | | | | | | | | | |
| | Add Notes: | Add notes section. | here. | They will | l appea | ir above | in the | "Notes" | | |

- 10.Select the **Save** button. If you are a **CPA Manager** role, you may select **Submit** to activate the CPA in the system.
- 11. Review the status of the CPA (if needed).
 - a. Accepted The CPA is active, and no further action is needed.
 - b. **Pending –** The CPA requires review & acceptance by ODDS State.
 - c. **Draft –** The CPA did not submit and may require troubleshooting. Refer to the <u>Brokerage</u> or <u>CDDP CPA Problem Solving Matrix</u> guide for help.