



Nextgen Population Health for a Value-Based System

TruCare ProAuth

Release 10.1.1

User Guide

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Contents

Document revision history.....	3
1: Introduction.....	8
Before you begin.....	8
TruCare ProAuth notes.....	10
2: Touring the dashboard.....	11
3: Populating the dashboard.....	15
Filtering options.....	16
4: Finding a member.....	19
Searching by member ID.....	20
Searching by name and date of birth.....	22
Member search results.....	24
5: Viewing a member summary.....	27
6: Creating and updating authorization requests.....	29
Creating an IP authorization request.....	30
Starting an IP authorization request.....	32
Completing the IP authorization prescreening.....	33
Providing the IP authorization details.....	37
Completing the IP procedure prescreening.....	43
Providing the IP procedure details.....	47
Reviewing the IP authorization.....	50

Adding an IP procedure or service.....	52
Removing an IP procedure or service.....	53
Editing an IP procedure or service.....	53
Adding an IP procedure.....	53
Extending an IP authorization.....	54
Starting an IP authorization extension.....	55
Completing the extend IP authorization prescreening.....	56
Completing the extend IP authorization details.....	57
Adding IP procedure(s) during Extend workflow.....	58
Reviewing the IP authorization extension.....	59
Creating an SP authorization request.....	60
Starting an SP authorization request.....	61
Completing the SP authorization prescreening.....	61
Providing the SP authorization details.....	65
Reviewing the SP authorization services.....	68
Adding or extending an SP service.....	73
Adding a service to an existing SP authorization.....	74
Extending a service on an existing SP authorization.....	79
Adding notes and attachments to authorization requests.....	85
Adding a note.....	86
Adding an attachment.....	86
Adding clinical criteria to authorization requests.....	87
Add InterQual Connect™ clinical criteria.....	88
Add Cite AutoAuth clinical criteria.....	89
7: Viewing authorization summary tables.....	92
View Inpatient Authorizations Summary table.....	94
View Service/Procedure Authorizations Summary table.....	94
View Service Request Authorizations Summary table.....	95

8: Acknowledging service requests.....	97
9: Viewing authorization details.....	99
IP authorization details.....	99
SP authorization details.....	102
SR authorization details.....	105
10: Viewing correspondence.....	107
Correspondence summary.....	107
View letter history.....	109
Viewing Letter History.....	110
Open PDF.....	110
A: Applying a filter to your provider list.....	111
Provider Filter indicators.....	112
About selecting providers in the Provider Filter.....	113
Applying a filter.....	114
Adding to a filter.....	117
Removing the filter.....	118
B: UDF guidelines.....	119
UDF types.....	120
C: Expired diagnosis or procedure codes.....	121
How TruCare ProAuth treats expired codes.....	121
Do not check dates setting.....	122
Warn when dates are invalid setting.....	122
Disallow invalid dates setting.....	125

D: TruCare ProAuth access from a member search in your parent portal.....	128
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Introduction

TruCare ProAuth™ is an interactive digital authorization management tool that streamlines the authorization process for providers and payer organizations. Providers submit authorization requests using a simple online process. Real-time responses and updates increase efficiency in the authorization process.

TruCare ProAuth key features enable you to:

- Search for members to retrieve demographic and eligibility information
- Submit inpatient or service/procedure authorizations
- View service requests entered by a member's care team
- Receive real-time status determinations
- Add notes and clinical criteria, as well as upload supporting documentation as part of the authorization process
- Access comprehensive views of authorizations for your associated providers

The payer organization determines your user role and the features enabled for your use in TruCare ProAuth.

For administrative information about using the TruCare ProAuth Configuration areas, refer to the *TruCare ProAuth Configuration Guide*.

Topics in this section

[Before you begin](#) on page 8

Review this information, check that your computer meets system requirements, and that you have proper credentials to log on to TruCare ProAuth.

[TruCare ProAuth notes](#) on page 10

As you work in TruCare ProAuth, keep the following key pieces of information in mind.

Before you begin

Review this information, check that your computer meets system requirements, and that you have proper credentials to log on to TruCare ProAuth.

Web browser requirements

These browsers have been certified for use with TruCare ProAuth.

- Internet Explorer 11
- Google Chrome 112 (Recommended)
- Mozilla Firefox 111
- Microsoft Edge 112
- Apple Safari 13 (Mac OS)

If you are using Safari as your browser, make sure that scroll bars are enabled. Refer to the online support for your browser.

All application activity must occur on a single browser tab. Zyter|TruCare does not recommend using multiple tabs.

For the best user experience, maximize your browser window.

Note: Pop-ups must be enabled in the browser. Pop-ups are required for the login screen to open. Refer to the online support for your browser if you need help managing pop-ups.

If you are using the Chrome browser in an Apache Windows non-SSL deployment, you must disable the **SameSite by default cookies** setting.

1. Go to this URL in your Chrome browser: `chrome://flags/#same-site-by-default-cookies`.
2. Change the **SameSite by default cookies** setting to **Disabled**.

Private mode

Do not use browsers in private mode (also called incognito) when using InterQual Connect™ or Cite AutoAuth in TruCare ProAuth. They do not work in browsers using private mode.

Display resolution

The recommended resolution for your display screen is 1280x1024. Maximum resolution is 1920x1080; minimum resolution, 1280x800.

If you are using InterQual Connect™ with TruCare ProAuth, use the following screen resolution settings for InterQual Connect™ to correctly display.

- The minimum vertical display resolution should be 960 pixels or greater.
- The minimum horizontal resolution depends on the display aspect ratio, as in the following examples.

Display Aspect Ratio	Resolution Settings
4:3	1280 x 960
16:10	1680x1050
16:9	1920 x 1080



Note: If your display is set to the correct resolution and InterQual Connect™ is still not displaying properly, verify that the screen scaling is set to 100%.

Signing on

The payee provides all information related to your user account and logon credentials. Check with your administrator for details.

System connectivity

If your connection to TruCare ProAuth times out, log back into TruCare ProAuth.

Use of TruCare ProAuth requires connectivity to other systems. On rare occasions, one of these systems may be temporarily unavailable, perhaps for maintenance or because of a power outage. If the system is not restored in what you consider to be a reasonable amount of time, contact the system administrator for more information.

TruCare ProAuth notes

As you work in TruCare ProAuth, keep the following key pieces of information in mind.

- This version of TruCare ProAuth does not support medication searches on structured notes.
- This version of TruCare ProAuth does not support the National Drug Code (NDC).
- This version of TruCare ProAuth does not support the following features:
 - Home & Community Services (Note: Viewing Service Requests is an available feature.)
 - Rx Authorizations

Touring the dashboard

TruCare ProAuth opens to the dashboard where you can locate members and work with authorizations.

On the dashboard you can start a member search, begin the workflow for an authorization request, and view or filter an authorization summary or a list of providers. You can also continue work on authorizations, such as extending authorizations or adding services.

As you move through the application, you can return to the main dashboard page by selecting **Dashboard** in the upper left.

Match the numbers on this illustration with the numbers in the table that follows for an explanation of the functional areas of the dashboard. The member in this example is fictional.

TruCare ProAuth

2 PROVIDER FILTER (0/83)

3 dmin TCAdministrator Help About

1 Dashboard

Member Search

IP Configuration

SP Configuration

SR Configuration

Global Configuration

Johnson, Kathy

Member ID
M1000100000

Date of Birth (Age)
05/02/1964 (58 years)

Gender
Female

Active Eligibility
Yes

Policy #
PN100009

Product
WL_TANF

Group #
43214243

Eligibility Effective Dates
11/01/2005 - 12/17/2025

4 Dashboard

CREATE INPATIENT AUTHORIZATION

CREATE SERVICE/PROCEDURE AUTHORIZATION

5 + Filter By ? Include Closed: No | From Date: 06/01/2018 | To Date: 06/05/2018 | Member ID: M1000100000 | Diagnosis Type: Medical

6 - Inpatient Authorizations Summary

7 EXTEND

8 VIEW AUTH DETAILS

9 VIEW CORRESPONDENCE

Member Na...	Authorizati...	Determinat...	From Date ...	To Date	Servicing F...	Diagnosis C...	State
Johnson, Ka...	IP0000001...	Pending	06/05/2018	06/07/2018	Dallas Medi...	001.1	Open
Johnson, Ka...	IP0000001...	Pending	06/03/2018	06/05/2018	Dallas Medi...	001.1	Open
Johnson, K...	IP0000001...	Pending	06/01/2018	06/03/2018	Dallas Med...	001.1	Open

10 1 10

11 - Service / Procedure Authorizations Summary

12 ADD/EXTEND SERVICE

VIEW AUTH DETAILS

VIEW CORRESPONDENCE

Member Name	Authorization #...	Determination S...	Start Date	End Date	State
Johnson, Kathy F	OP0000002495	Pending	06/05/2018	06/07/2018	Open
Johnson, Kathy F	OP0000002350	Pending	06/03/2018	06/05/2018	Open
Johnson, Kathy F	OP0000002276	Pending	06/01/2018	06/03/2018	Open
Johnson, Kathy F	OP0000004000	Partially Approved	01/01/2017	01/01/2030	Open

13 1 10

1

Functional areas of the dashboard

This table describes the functional areas of the dashboard.

Number	Function	Description
1	Navigation Pane	<p>A designated space for links to other web pages and for data on a selected member.</p> <p>Select Dashboard to restore the default page.</p> <p>Select Member Search to find a member. For more information about finding a member, see Finding a member on page 19.</p>

Number	Function	Description
2	Provider Filter	<p>A tool for searching and filtering providers associated with your user account.</p> <p>For more information about using the provider filter, see Applying a filter to your provider list on page 111.</p>
3	References	<p>Name of the user currently signed in.</p> <p>Select Help to download the User Guide.</p> <p>Select About to display the ProAuth version.</p>
4	Create authorization request buttons/ menus	<p>Use the buttons or menus to begin creating an inpatient or service/ procedure authorization request. If behavioral health is enabled for IP or SP authorizations, there is a dropdown instead of the button.</p> <p>For more information, see Creating an IP authorization request on page 30 or Creating an SP authorization request on page 60.</p>
5	Filter (Filter By)	<p>A tool that controls what displays in the dashboard summary tables.</p> <p>For more information, see Populating the dashboard on page 15.</p> <p>For this example the Filter By tool is compressed.</p>
6	Inpatient Authorizations Summary	<p>A table of inpatient authorizations for providers associated with your user account. You use the dashboard's Filter to populate the summary table with authorization requests.</p> <p>For more information, see Viewing authorization summary tables on page 92.</p>
7	Extend	<p>Use to extend an open IP authorization request. This workflow starts at the dashboard with the selection of the authorization to be amended.</p> <p>For more information, see Extending an IP authorization on page 54.</p>
8	View Auth Details	<p>Use to access to the Authorization Details page.</p> <p>Select an authorization, then select View Auth Details.</p> <p>For more information, see Viewing authorization details on page 99.</p>

Number	Function	Description
9	View Correspondence	<p>Use to view the Correspondence Summary. From there you can open Letter History to view, share, or print letters sent to the member.</p> <p>Select an authorization, then select View Correspondence.</p> <p>For more information see Viewing correspondence on page 107.</p>
10	Page controls	Displays the current page on view and the controls for moving to first, previous, next, or last page and for setting the number of table rows to view on each page.
11	Service/Procedure Authorizations Summary	<p>A table of service/procedure authorizations for providers associated with your user account. You use the dashboard's Filter to populate the summary table with authorization requests.</p> <p>For more information, see Viewing authorization summary tables on page 92.</p>
12	Add/Extend Service	<p>Use to add a service to or extend a service on an existing SP authorization request. This workflow starts at the dashboard with the selection of the authorization to be amended.</p> <p>For more information, see Adding or extending an SP service on page 73.</p>
13	Line Item	By member, each distinct service request that is submitted for authorization. The line item comprises parameters such as service date range, primary diagnosis and procedure codes, place of service, servicing provider, stay level or service type, and authorization status.
Not shown	Service Request Authorizations Summary	<p>A table of service request authorizations for providers associated with your account. You use the dashboard's Filter to populate the summary table with service requests. Your organization controls the display of this table.</p> <p>For more information, see Viewing authorization summary tables on page 92.</p>

Populating the dashboard

You can populate the TruCare ProAuth dashboard with authorizations related to a specific member or providers.

When you launch the application, all dashboard fields are blank except the Date of Service From Date in the Filter By section. The value in this field defaults to seven days prior to the current date.

You can display authorizations in summary tables on the dashboard. There is more than one way to display authorization requests and you can use filters to narrow the search for authorizations.

To populate a dashboard summary table with authorizations, use one of the following options:

- Provide a Member ID or Authorization Number in one of those fields and select **Filter**.
This search process checks all of your associated providers and displays all matching authorizations in a summary table.

You can narrow the search results using the following additional filtering options in the Filter By area:

- Select providers from the Provider Filter.
- Use the filtering options in Filter By.
- Select at least one provider from the Provider Filter and provide values in the Date Range, Service Type, and Diagnosis Type (if available) fields.

This search process displays all matching authorizations associated with the provider in a summary table.

Your filter can also include closed authorizations (Include Closed check box) or authorizations that only you have requested (Requested By Me check box). These options are in the Filter By area.

Any authorizations matching your search are displayed in summary tables.

Dashboard

Member Search

Contreras, Naomi

Member ID
M1000060000

Date of Birth (Age)
07/02/1995 (23 years)

Gender
Female

Active Eligibility

Dashboard

CREATE INPATIENT AUTHORIZATION

CREATE SERVICE/PROCEDURE AUTHORIZATION

Filter By

Include Closed: No | From Date: 07/19/2018 | Member ID: M1000060000

Inpatient Authorizations Summary

EXTEND

VIEW AUTH DETAILS

Member Name	Authorization #	Determination Stat...	From Date	To Date	Servicing Facility	Diagnosis Code	State
Contreras, Naomi	IP0000001399	Pending	11/01/2018	11/09/2018	Brooks, Douglas	707.13	Open
Contreras, Naomi	IP0000001193	Pending	10/14/2018	10/28/2018	Dallas Medical Cent...	436	Open
Contreras, Naomi	IP0000001037	Pending	08/29/2018	08/31/2018	Dallas Medical Cen...	436	Open
Contreras, Naomi	IP0000001872	Partially Approved	08/02/2018	08/05/2018	Brooks, Douglas	006.4	Open
Contreras, Naomi	IP0000001637	Pending	08/01/2018	08/02/2018	Brooks, Douglas	006.4	Open
Contreras, Naomi	IP0000000676	Pending	07/25/2018	07/31/2018	Brooks, Douglas	017.10	Open
Contreras, Naomi	IP0000000753	Pending	07/24/2018	07/29/2018	Gooding, Lisa W	014.83	Open
Contreras, Naomi	IP0000000882	Pending	07/24/2018	08/07/2018	Brooks, Douglas	014.83	Open

10

Service / Procedure Authorizations Summary

ADD/EXTEND SERVICE

VIEW AUTH DETAILS

Member Name	Authorization #	Determination Status	Start Date	End Date	State
Contreras, Naomi	OP0000001725	Approved	08/01/2018	08/01/2018	Open
Contreras, Naomi	OP0000000929	Approved	07/24/2018	07/27/2018	Open

Selecting **Reset** removes all values and entries on the dashboard. The value of the Date of Service From Date field is restored to the default.

Topics in this section

[Filtering options](#) on page 16

You can use filtering options to display authorizations of interest.

Related concepts

[Applying a filter to your provider list](#) on page 111

Using filtering is one of the best ways to make your work activities more efficient.

[Viewing authorization summary tables](#) on page 92

You can view authorizations linked to your user account in summary tables on the dashboard.

Filtering options

You can use filtering options to display authorizations of interest.

In addition to using a provider list filter, you can use the filters in **Filter By** area of the dashboard to narrow the authorization search results.

A tool tip in the Filter By area explains your filtering options.

TruCare® ProAuth PROVIDER FILTER (0/0) Portal Writer Help About

Dashboard CREATE INPATIENT AUTHORIZATION CREATE SERVICE/PROCEDURE AUTHORIZATION

Member Search

Filter By ?

Filtering by Member ID or Authorization Number will use all associated providers in the provider filter or manually selected providers.
Filtering by all other fields require at least one provider to be selected.

Member ID Authorization Number Diagnosis Type

Date of Service From Date Date of Service To Date Inpatient Service Types Service/Procedure Service Types

☐ Include Closed ☐ Requested By Me

FILTER RESET

Inpatient Authorizations Summary

EXTEND VIEW AUTH DETAILS

Member Name	Authorization #	Determination	From Date	To Date	Servicing Facility	Diagnosis Code	State
No records found							

Service / Procedure Authorizations Summary

ADD/EXTEND SERVICE VIEW AUTH DETAILS

Member Name	Authorization #	Determination Status	Start Date	End Date	State
No records found					

?

Filtering by Member ID or Authorization Number will use all associated providers in the provider filter or manually selected providers.
Filtering by all other fields require at least one provider to be selected.

Use the following filters to control the authorizations displayed in summary tables on the dashboard.

Filter	Description
Member ID	Enter the number of characters specified onscreen. Specification for this field is identical to the Member ID field of Member Search.
Authorization Number	Enter the exact number.
Diagnosis Type	Select the diagnosis type from the menu. <div> Note: This menu is available only if behavioral health authorization requests are enabled in TruCare ProAuth. </div>

Filter	Description
Inpatient Service Types	Select the IP service type from the menu.
Service/Procedure Service Types	Select the SP service type from the menu.
Date of Service From Date	<p>Use this with Date of Service To Date to specify the date of service range.</p> <p>This date defaults to seven days before the current date. Modify the date if needed.</p> <p>Input the date in format mm/dd/yyyy or use the date picker to complete the entry.</p>
Date of Service To Date	<p>Enter an end date for the date of service range.</p> <p>Input the date in format mm/dd/yyyy or use the date picker to complete the entry.</p>
Include Closed	Select this option to add closed authorizations to the filter.
Requested By Me	Select this option to limit the filter to authorizations that your filtered list of providers requested.

Related concepts

[Applying a filter to your provider list](#) on page 111

Using filtering is one of the best ways to make your work activities more efficient.

[Viewing authorization summary tables](#) on page 92

You can view authorizations linked to your user account in summary tables on the dashboard.

Finding a member

You can search for a member to work on member-specific tasks, such as viewing member authorization requests or creating a new authorization request for a member.

You can perform the member search using one of two methods: by member ID or by name and date of birth.

Note: Search by Name and Date of Birth is an option that the payer (health plan) chooses to enable or not. This option is displayed only when the payer has chosen to configure its use.

The screenshot shows the 'Member Search' interface. On the left is a sidebar with a 'Dashboard' link and a 'Member Search' link, which is highlighted with an orange border. The main content area is titled 'Member Search' and contains two search methods. The first method, 'Search by ID', is selected with a radio button. It features a 'Member ID' input field with a placeholder 'Enter 11 characters OR 9 characters and date of birth' and a 'Date of Birth' input field with a placeholder 'MM/DD/YYYY' and a calendar icon. The second method, 'Search by Name and Date of Birth', is unselected. It features three input fields: 'First Name' (placeholder 'Enter at least 2 characters'), 'Last Name' (placeholder 'Enter at least 2 characters'), and 'Date of Birth' (placeholder 'MM/DD/YYYY' with a calendar icon). At the bottom right of the form are 'SEARCH' and 'RESET' buttons.

In general, you search for a member before you begin the workflow for creating an authorization request. But if you select the button for creating an authorization first, the member search comes next. Once the Member Search screen is open, the steps for finding a member are the same.

Note: You cannot see members for whom access is restricted. Under this limitation, functions for viewing member details and creating authorizations are inaccessible.

Topics in this section

[Searching by member ID](#) on page 20

Use the member ID to locate the member in TruCare ProAuth.

[Searching by name and date of birth on page 22](#)

Use the member name and date of birth to locate the member in TruCare ProAuth.

[Member search results on page 24](#)

A successful member search returns key information about a member.

Searching by member ID

Use the member ID to locate the member in TruCare ProAuth.

When searching by member ID, you need to provide the member ID required by your organization.

Your organization might allow you to provide the member's date of birth with part of the member ID. If so, the Date of Birth field appears with the Member ID field.

At any point during a member search you can use Reset to clear the fields and start new search.

To search by member ID, use the following steps.

1. Select **Member Search** on the navigation pane.

The Member Search page opens.

2. Select **Search by ID**.

If search by Member ID is the only search option, Search by ID is not displayed and you can skip this step.

3. Enter the member's ID in the Member ID field, using the instructions specified on the screen.

In this example, follow the specification to enter the 11-character member ID or the first 9 characters of the member ID and the member's date of birth.

The instructions used by your organization might be different. You might be prompted to enter a member ID that is within a specified numeric range (for example, an ID with a length between 5–9 characters) or from a list of specified numbers (for example, an ID with a length that is 5, 7, 9, or 11 characters).

The screenshot shows the 'Member Search' form. At the top, there is a section for 'Search by ID' which is selected with a radio button. Below this, there are two input fields: 'Member ID' and 'Date of Birth'. The 'Member ID' field has a placeholder text 'Enter 11 characters OR 9 characters and date of birth'. The 'Date of Birth' field has a placeholder text 'MM/DD/YYYY' and a calendar icon. Below these fields, there is a section for 'Search by Name and Date of Birth' which is not selected. This section has two input fields: 'First Name' and 'Last Name'. The 'First Name' field has a placeholder text 'Enter at least 2 characters' and the 'Last Name' field has a placeholder text 'Enter at least 2 characters'. At the bottom right of the form, there are two buttons: 'SEARCH' and 'RESET'.

- If using date of birth, enter the member's date of birth.
Use the mm/dd/yyyy format. You must include the forward slash symbol (/). Or, you can use the date picker to complete the entry.
- Select **Search**.

If the search results include only one member, the results appear below the search area.

Member Search


☒ Search by ID

Member ID

Enter 11 characters OR 9 characters and date of birth

Date of Birth

MM/DD/YYYY



☐ Search by Name and Date of Birth

First Name


Enter at least 2 characters

Last Name

Enter at least 2 characters

Date of Birth


MM/DD/YYYY



SEARCH

RESET

▼ Member Search Results

	Member ID	Name	Date of Birth	Gender	Active Eligibility	Eligibility Effective Dates
	M1000020000	Abbott, Robert C	05/02/1942	Male	Yes	11/01/2005 - 12/17/2025

VIEW SUMMARY

CREATE INPATIENT AUTHORIZATION

CREATE SERVICE/PROCEDURE AUTHORIZATION

Sometimes the results include more than one match. This could happen if you are searching a family that had a multiple birth event. The page updates to include the First Name field and a message informs you of what to do next.


Member Search

Member ID

Enter 11 characters OR 9 characters and date of birth

Date of Birth

MM/DD/YYYY



First Name

SEARCH

RESET

More than one member meets the search criteria, please enter the member's first name

Enter the first name and select the correct member on the results table.

Member ID

ZTM42631-

Enter 11 characters OR 9 characters and date of birth

Date of Birth

01/01/2001

MM/DD/YYYY

First Name

Jose

SEARCH

RESET

▼ Member Search Results

	Member ID	Name	Date of Birth	Gender	Active Eligibility	Eligibility E
🔍	ZTM42631-3	Test, Jose	01/01/2001	Male	No	
	ZTM42631-2	Test, Joseph	01/01/2001	Male	No	

VIEW SUMMARY

CREATE INPATIENT AUTHORIZATION

CREATE SERVICE/PROCEDURE AUTHORIZATION

Related procedures

[Viewing a member summary on page 27](#)

You can view details of a selected member in order to take further actions for that member.

Searching by name and date of birth

Use the member name and date of birth to locate the member in TruCare ProAuth.

Searching for a member by name and date of birth must have been configured for your organization's use for it to appear in the dashboard.

Search for member's by first name, last name, and date of birth. All three fields are mandatory.

Use at least two characters in the two name fields. You can use wildcards in first and last names for searches. The date of birth is still required in a wildcard search. For example, you can search for mi*, b*, 05/02/1954.

Note: The recommended search method is the use of full first name and last name.

At any point during a member search you can use Reset to clear the fields and start new search.

To search for a member by name and date of birth, use the following steps.

1. Select **Member Search** on the navigation pane.
The Member Search page opens.

Member Search

☐ Search by ID

Member ID

Enter 11 characters OR 9 characters and date of birth

Date of Birth

MM/DD/YYYY

☒ Search by Name and Date of Birth

First Name

Enter at least 2 characters

Last Name

Enter at least 2 characters

Date of Birth

MM/DD/YYYY

SEARCH

RESET

2. Select **Search by Name and Date of Birth**.
3. Enter the member's first name in the **First Name** field.
4. Enter the member's last name in the **Last Name** field.
5. Enter the member's date of birth.
Use the mm/dd/yyyy format. You must include the forward slash symbol (/). Or, you can use the date picker to complete the entry.
6. Select **Search**.

If the search results include only one member, the results appear below the search area.

Member Search

☐ Search by ID

Member ID

Enter 11 characters OR 9 characters and date of birth

Date of Birth

MM/DD/YYYY

☒ Search by Name and Date of Birth

First Name

Enter at least 2 characters

Last Name

Enter at least 2 characters

Date of Birth

MM/DD/YYYY

SEARCH

RESET

Member Search Results

	Member ID	Name	Date of Birth	Gender	Active Eligibility	Eligibility Effective Dates
	M1000040000	Bertram, Michael E	05/02/1954	Male	Yes	11/01/2005 - 12/17/2025

VIEW SUMMARY

CREATE INPATIENT AUTHORIZATION

CREATE SERVICE/PROCEDURE AUTHORIZATION

Sometimes the results include more than one match. A message informs you of what to do next.

Member Search

☐ Search by ID

Member ID

Enter 11 characters OR 9 characters and date of birth

Date of Birth

MM/DD/YYYY

☒ Search by Name and Date of Birth

First Name

Enter at least 2 characters

Last Name

Enter at least 2 characters

Date of Birth

MM/DD/YYYY

SEARCH

RESET

More than one member meets the search criteria. Enter additional information or use the Member ID search.

Enter the requested information or use the Member ID to search for an exact match. Select the correct member in the search results.

Related procedures

[Viewing a member summary](#) on page 27

You can view details of a selected member in order to take further actions for that member.

Member search results

A successful member search returns key information about a member.

The member search returns the member ID, member name, date of birth, gender, active eligibility, and eligibility effective dates.

Member Search

☒ Search by ID

Member ID

M10000400

Enter 11 characters OR 9 characters and date of birth

Date of Birth

05/02/1954

MM/DD/YYYY

☐ Search by Name and Date of Birth

First Name

Enter at least 2 characters

Last Name

Enter at least 2 characters

Date of Birth

MM/DD/YYYY

SEARCH

RESET

▼ Member Search Results

	Member ID	Name	Date of Birth	Gender	Active Eligibility	Eligibility Effective Dates
👤	M1000040000	Bertram, Michael E	05/02/1954	Male	Yes	11/01/2005 - 12/17/2025
	Policy #	Product	Group #	Eligibility Start Date	Eligibility End Date	
	PN1000040000	WI_TANF	943424243	11/01/2005	12/17/2025	

VIEW SUMMARY

CREATE INPATIENT AUTHORIZATION

CREATE SERVICE/PROCEDURE AUTHORIZATION

As long as you have the current member active (or selected), the data on this member displays as the point of focus in the navigation pane. Any authorization requests that are created and submitted relate to this specific member. When you need to create an authorization request for a different member, start by selecting Member Search in the navigation pane.

Dashboard

Member Search

Bertram, Michael

Member ID
M1000040000

Date of Birth (Age)
05/02/1954 (63 years)

Gender
Male

Active Eligibility

Member Search

☒ Search by ID

Member ID
M10000400

Date of Birth
05/02/1954

☐ Search by Name and Date of Birth

First Name

Last Name

Date of Birth

SEARCH

RESET

Member Search Results

	Member ID	Name	Date of Birth	Gender	Active Eligibility	Eligibility Effective Dates
⊕	M1000040000	Bertram, Michael E	05/02/1954	Male	Yes	11/01/2005 - 12/17/2025

Policy #	Product	Group #	Eligibility Start Date	Eligibility End Date
PN1000040000	WL_TANF	943424243	11/01/2005	12/17/2025

VIEW SUMMARY

CREATE INPATIENT AUTHORIZATION

CREATE SERVICE/PROCEDURE AUTHORIZATION

Viewing a member summary

You can view details of a selected member in order to take further actions for that member.

After a member search, you can access more details about the member.

To see a member summary:

1. If you have more than one member in the search results, select the member you want to work with (otherwise, skip to the next step).
2. At the bottom of the Member Search page, select **View Summary**.

The screenshot displays the 'Member Search' interface. On the left is a sidebar with navigation links: Dashboard, Member Search, Bertram, Michael, Member ID (M1000040000), Date of Birth (Age) (05/02/1954 (63 years)), Gender (Male), Active Eligibility (Yes), Policy # (PN1000040000), Product (WL_TANF), Group # (943424243), and Eligibility Effective Dates (11/01/2005 - 12/17/2025). The main content area is titled 'Member Search' and features two search methods: 'Search by ID' (selected) and 'Search by Name and Date of Birth'. Under 'Search by ID', the Member ID is 'M10000400' and the Date of Birth is '05/02/1954'. Below these are 'SEARCH' and 'RESET' buttons. The 'Member Search Results' section shows a table with one result for Michael E. Bertram. Below the table are three buttons: 'VIEW SUMMARY' (highlighted with an orange box), 'CREATE INPATIENT AUTHORIZATION', and 'CREATE SERVICE/PROCEDURE AUTHORIZATION'.

Member ID	Name	Date of Birth	Gender	Active Eligibility	Eligibility Effective Dates
M1000040000	Bertram, Michael E	05/02/1954	Male	Yes	11/01/2005 - 12/17/2025

Policy #	Product	Group #	Eligibility Start Date	Eligibility End Date
PN1000040000	WL_TANF	943424243	11/01/2005	12/17/2025

The Member Summary page opens.

TruCare® ProAuth
PROVIDER FILTER (78/78)
Portal Writer
Help About

Dashboard
Member Search
Bertram, Michael
Member ID
M1000040000
Date of Birth (Age)
05/02/1954 (62 years)
Gender
Male
Active Eligibility
Yes
Policy #
PN100004
Product
WL_TANF

Member Summary
CREATE INPATIENT AUTHORIZATION
CREATE SERVICE/PROCEDURE AUTHORIZATION

Member ID	Name	Date of Birth (Age)	Gender
M1000040000	Bertram, Michael E	05/02/1954 (62 years)	Male
Primary Language	Secondary Language	Medicaid #	Medicare #
Tagalog	Portuguese	654548365	003624542465
Employer	PCP Name	PCP Phone #	
Advanced Network Technologys	Dr Lima Waposs Samuels Senior	(507) 321-2321	

Eligibility

Rank	Policy #	Group #	Product	Carrier	Effective Dates
0	PN100004	943424243	WL_TANF	Dallas Medical Care	11/01/2005 - 12/17/2025



Note:

Rank is to distinguish between primary, secondary and tertiary client coverages TruCare Rankings numbering starts as 1 and can go up to the number of coverage entities a company may have. Primary coverage will come in as a 1 on the member feed as 1, secondary as a 2, and continue on. A member can have more than one primary (example one for medical and one for behavioral) so in this example the user would have to choose which to use for eligibility when entering authorization.

Related procedures

[Searching by member ID on page 20](#)

Use the member ID to locate the member in TruCare ProAuth.

[Searching by name and date of birth on page 22](#)

Use the member name and date of birth to locate the member in TruCare ProAuth.

Creating and updating authorization requests

Use these instructions to create and update IP and SP authorization requests.

Topics in this section

[Creating an IP authorization request](#) on page 30

You can create inpatient (IP) authorization requests in the TruCare ProAuth dashboard.

[Adding an IP procedure](#) on page 53

If the inpatient comprehensive workflow is supported, you can add inpatient procedure(s) or service(s) to an open IP authorization request. This workflow offers convenience and work/time efficiencies.

[Extending an IP authorization](#) on page 54

You can extend an open IP authorization request. The extend function includes standard or comprehensive workflow that offers convenience and work/time efficiencies.

[Adding IP procedure\(s\) during Extend workflow](#) on page 58

[Creating an SP authorization request](#) on page 60

You can create service/procedure (SP) authorization requests in the TruCare ProAuth dashboard.

[Adding or extending an SP service](#) on page 73

You can add a service or extend an existing service on an open SP authorization request. These workflows offer convenience and work/time efficiencies.

[Adding notes and attachments to authorization requests](#) on page 85

Sometimes you need to add a note or an attachment to an authorization request.

[Adding clinical criteria to authorization requests](#) on page 87

Sometimes you need to add clinical criteria to an authorization request.

Creating an IP authorization request

You can create inpatient (IP) authorization requests in the TruCare ProAuth dashboard.

You can create two types of IP authorization requests: medical or behavioral health. The authorization request workflow is the same for both types of requests. If your organization does not support creation of behavioral health authorizations, they are not enabled in TruCare ProAuth.

You must complete all mandatory fields and customized User Defined Fields (UDFs) that are marked with an asterisk * when submitting an authorization request. For more information about UDFs, see [UDF guidelines](#) on page 119.

As you proceed through the workflow, the header on the screens reflects the type of authorization request you are creating.

- Select **Create Inpatient Authorization** for medical IP authorization requests.
- Select **Create Inpatient Behavioral Health Authorization** for behavioral health IP authorization requests.

There are two types of workflows for Inpatient Authorizations: standard and comprehensive. Your payer organization determines the workflows for Inpatient medical and Inpatient behavioral authorizations.

The visual header at the top of the screen indicates where you are in the main parts of standard IP Authorization workflow: Prescreen, Authorization Details, or Authorization Confirmation.

The standard IP Authorization workflow (see image below) follows these high-level tasks:

Create Inpatient Authorization

Prescreen Authorization Details Authorization Confirmation

* Admission Date: 02/11/2019 (MM/DD/YYYY)

* Member's Applied Eligibility: TX_HMO

* Servicing Facility: Dallas Medical Center (4000000230) CLEAR

ⓘ Servicing Facility selected is out of network.

* Primary Diagnosis: HYPERTENSIVE HEART DISEASE UNSPEC W/HEART FAIL (402.91) ICD9 CLEAR

* Primary Procedure: THERAPEUTIC ULTRASOUND OF HEART (00.02) ICD9 CLEAR

* Stay Level: Medical * Requested Days: 3 Service Type: Medical Care *

NEXT CANCEL

1. Start an authorization request.

2. Complete the IP authorization Prescreen.
3. Complete the Authorization Details section of the request and then submit it.

For organizations that utilize the comprehensive Inpatient Authorization workflow, the visual header at the top of the screen indicates where you are in the main parts of this workflow: Admission Prescreen, Admission Details, Procedure Prescreen, Procedure Details, Review or Authorization Confirmation.

The comprehensive Authorization workflow (see image below) involves the following high-level tasks:

1. Start an authorization request.
2. Complete the IP Admission Prescreen.
3. Complete the Authorization Details.
4. Complete Procedure Prescreen (if needed or click **Next** to go to Review).
5. Complete Procedure Details (if procedure prescreen was completed).
6. Review Inpatient admission and Inpatient procedure(s) and modify them as needed, then submit the authorization.

Note: The option values shown in the workflow topics in this section are only illustrative.

Topics in this section

[Starting an IP authorization request on page 32](#)

Initiate an IP authorization request on the dashboard.

[Completing the IP authorization prescreening on page 33](#)

Complete the Prescreen page fields to learn the classification of an IP authorization request immediately. This is part of the standard Inpatient workflow.

[Providing the IP authorization details on page 37](#)

After completing the prescreen evaluation, provide IP authorization request details on the Authorization Details page.

[Completing the IP procedure prescreening on page 43](#)

Complete the Procedure Prescreen immediately to learn the classification of IP procedure(s) request. This is part of the comprehensive Inpatient workflow.

[Providing the IP procedure details on page 47](#)

After completing the Procedure Prescreen evaluation, provide IP procedure details on the Authorization Details page.

[Reviewing the IP authorization on page 50](#)

After providing IP procedure details, you can review and make any needed changes.

[Adding an IP procedure or service on page 52](#)

You can add an inpatient procedure or service when creating or extending an IP authorization request from the Review page.

[Removing an IP procedure or service on page 53](#)

You can remove an inpatient procedure or service from the Review page.

[Editing an IP procedure or service on page 53](#)

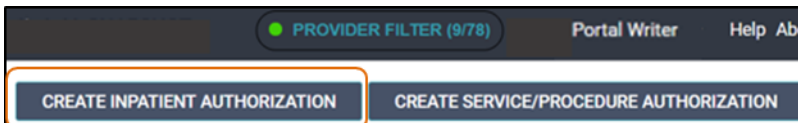
You can edit an inpatient procedure or service from the Review page.

Starting an IP authorization request

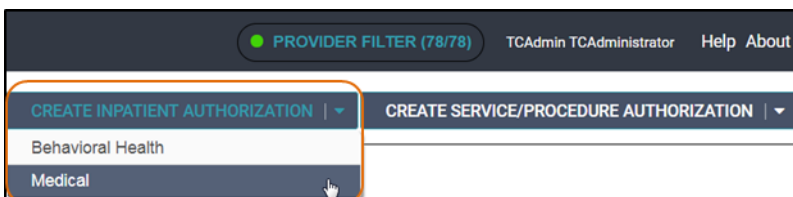
Initiate an IP authorization request on the dashboard.

Use one of the following actions on the dashboard to start creating an IP Authorization request. The available actions depend on whether behavioral health is enabled in TruCare ProAuth.

- If behavioral health is not enabled, select **Create Inpatient Authorization** (to create a medical authorization).



- If behavioral health is enabled, from the **Create Inpatient Authorization** menu, choose Behavioral Health or Medical.



The Prescreen page opens. Now you can add information for preliminary evaluation.

Completing the IP authorization prescreening

Complete the Prescreen page fields to learn the classification of an IP authorization request immediately. This is part of the standard Inpatient workflow.

In the first part of the authorization request process, you provide prescreen information.

Note: Depending on your organization's workflow, prescreen may be labeled as Admission prescreen or Prescreen. Both workflows will follow the same prescreen evaluation.

The prescreen functionality immediately provides the classification of an Inpatient authorization request. If authorization is required, you can proceed with the workflow. If authorization is not required, or if another business evaluation occurs, TruCare ProAuth displays a message to inform you of the action to follow.

You might see messages while completing the Prescreen section. For more information about the messages, see [Prescreen messages](#) on page 36.

To complete the Prescreen section:

1. Enter the admission date in the format mm/dd/yyyy or use the date picker.
2. From the **Member's Applied Eligibility** menu, make a selection.

This field auto-completes when the member's eligibility is on record. There is only one active eligibility for the date of service.
3. Specify the servicing facility:
 - a. Enter a minimum of two characters in the **Search by Provider name** or **Search by Provider NPI** and select **Search**.

If the characters you enter have a unique match, the fields are filled in automatically.
 - b. Select the facility from the list.

This search is checked against the full TruCare provider database. If you search using the dashboard provider filter, you are limited to only those facilities associated with your user account.

If necessary, select **Clear** to start over.
4. Specify the primary diagnosis:
 - a. Enter a minimum of two characters in **Search by Diagnosis name** or **Search by Code**, optionally choose a code set from the drop-down menu, and select **Search**.

Use precise criteria to get the best search results; only 50 data entries are shown per search.

If the characters you enter match a single record, the fields are filled in automatically and you can skip the next step.

If your search did not result in a match, a slider opens with search results. To refine your search, select **Name contains** or **Name starts with**, enter your new search term in **Search by Diagnosis name** or **Search by Code**, optionally select a code set, and select **Search**.
 - b. Choose the correct record (diagnosis name, code, code set) in the search results, scrolling through the list if needed.

The code set includes the diagnosis coding schemes defined in TruCare.

If necessary, select **Clear** to start over.

You might see a message about a diagnosis code being expired. For more information about expired codes, see [Expired diagnosis or procedure codes](#) on page 121.

5. Specify the primary procedure:

Note: This entry is required only if the payer has set the field to mandatory or this entry may be suppressed from this page.

- a. Enter a minimum of two characters in the **Search by Procedure name** or **Search by Code**, optionally choose a code set from the drop-down menu, and select **Search**.

Use precise criteria to get the best search results; only 50 data entries are shown per search.

If the characters you enter match a single record, the fields are filled in automatically and you can skip the next step.

If your search did not result in a match, a slider opens with search results. To refine your search, select **Name contains** or **Name starts with**, enter your new search term in **Search by Procedure name** or **Search by Code**, optionally select a code set, and select **Search**.

- b. Choose the correct record (procedure name, code, code set) in the search results, scrolling through the list if needed.

The code set includes the procedure coding schemes defined in TruCare.

If necessary, select **Clear** to start over.

You might see a message about a procedure code being expired. For more information about expired codes, see [Expired diagnosis or procedure codes](#) on page 121.

6. From the **Stay Level** menu, make a selection.
7. In the **Requested Days** field, type the number of requested days or use the scroll arrows to enter requested days.

Note: This field is displayed only when the payer has chosen to configure its use.

8. From the **Service Type** menu, make a selection.
9. Select **Next**.

The prescreen information is processed. If you can proceed with the authorization request, you automatically continue to the Authorization Details page, where you can add more details.

You might see a message with additional information about the request. Click **Next** again to continue to the Authorization Details page.

Sometimes the results of the prescreen evaluation prevent you from continuing with the authorization request, for one of the following reasons:

- Authorization is not required
- Duplicate request
- Review needed by a third party

- Member ineligibility

Select **Cancel** and then respond to the prompt to discard changes. Select **Yes** to return to the dashboard; select **No** to stay in the Prescreen page.

In the example below, the prescreen evaluation reports that “authorization is not required” and provides the reason why there is no requirement. You cannot proceed.

The screenshot shows the 'Create Inpatient Authorization' form with a progress bar at the top indicating three steps: Prescreen, Authorization Details, and Authorization Confirmation. The 'Prescreen' step is currently active. The form contains several input fields and buttons:

- Servicing Facility:** A dropdown menu showing 'Dallas Medical Center' and a text input field with '4000000230'. A 'CLEAR' button is next to the input field. A message below states: 'Servicing Facility selected is out of network.'
- Primary Diagnosis:** A dropdown menu showing 'HYPERTENSIVE HEART DISEASE UNSPEC W/HEART FAIL' and a text input field with '402.91'. A dropdown menu for 'ICD9' is set to 'ICD9'. A 'CLEAR' button is next to the input field.
- Primary Procedure:** A dropdown menu showing 'THERAPEUTIC ULTRASOUND OF HEART' and a text input field with '00.02'. A dropdown menu for 'ICD9' is set to 'ICD9'. A 'CLEAR' button is next to the input field.
- Stay Level:** A dropdown menu set to 'Medical'.
- Requested Days:** A text input field with '3'.
- Service Type:** A dropdown menu set to 'Medical Care'.

At the bottom of the form, a message box states: 'IP Auth is not required for diagnosis code 402.91. Authorization is not required'. Below this message are 'NEXT' and 'CANCEL' buttons.

Topics in this section

[Prescreen messages](#) on page 36

When working on the prescreen part of an authorization request, you might see one of these messages.

Prescreen messages

When working on the prescreen part of an authorization request, you might see one of these messages.

Prescreen results are controlled by rules set up by the payee. The messages that appear during the prescreen process could include default messages or custom messages. The following table includes some of the possible messages you might see.

Possible prescreen message	Description
Authorization - Not Required	Approval might not be required for some standard or routine service.
Authorization - Duplicate Request	The same authorization has been submitted previously. You need to contact the payer for resolution.

Possible prescreen message	Description
Authorization - Third Party Vendor	You cannot submit a required authorization that a third-party vendor reviews.
Eligibility - Member Ineligible	The member is not eligible for treatment.
Servicing Facility - Out of Network	<p>Servicing facility selected is out of network.</p> <div> <i>i</i> Note: This message is informational only. You can continue with the authorization request and IP authorizations with the comprehensive workflow enabled. </div>
Section Guidelines	<p>A specification for the authorization to be requested.</p> <div> <i>i</i> Note: This message might appear when creating SP authorization requests and the IP comprehensive workflow on procedure prescreen. </div>
Authorization required reason	The reason that an authorization is required might be specified by the payee.
Authorization auto-approval reason	The reason that an authorization is automatically approved might be specified by the payee.
Recommended number of LOS-Units reason	The reason for the recommended number of LOS-Units might be specified by the payee.
Review notes	Authorization review notes might be specified by the payee.

Providing the IP authorization details

After completing the prescreen evaluation, provide IP authorization request details on the Authorization Details page.

When the Authorization Details page opens, you see the prescreen section where there is a collapsible dash indicating entries to view (see image below). You might see an entry for Requested Days that you did not make. This entry is configured by the payee and is displayed automatically when criteria are met.

Dashboard
Member Search
IP Configuration
SP Configuration
Global Configuration
Abbott, Robert
Member ID
M1000020000
Date of Birth (Age)
05/02/1942 (76 years)
Gender
Male

Create Inpatient Authorization

ADD NOTEADD ATTACHMENT (0)

PrescreenAuthorization DetailsAuthorization Confirmation

Prescreen

Admission Date
02/12/2019
Member's Applied Eligibility
TX_HMO
Stay Level
Medical
Requested Days
3
Primary Diagnosis
MALIGNANT NEOPLASM OF HEART (164.1)
Primary Procedure
Servicing Facility
Dallas Medical Center
Service Type
Medical Care

Authorization Details

If you need to edit something in the Prescreen section, you have to go back to the Prescreen page to enter the change. Select **Back to Prescreen**. After any change, prescreen runs again when you select **Next** to determine whether authorization is required.

Complete the authorization details fields in the rest of the Authorization Details page.



Note: All the fields on the Authorization Details screen are required or optional based on the configuration settings entered by the payer. The exception is for requesting provider contact information; namely, name, phone, and fax. Entry into these fields is always required. Required fields are marked with an asterisk.

Create Inpatient Authorization

ADD NOTE

ADD ATTACHMENT (0)

Prescreen

Authorization Details

Authorization Confirmation

Authorization Details

* Admission Type

Urgent

* Admission Source

Physician Referral

* Place of Service

Inpatient Hospital

Target Discharge Date

09/11/2019

MM/DD/YYYY

Level of Urgency

Non-Urgent

URGENCY DEFINITION

* Out of Network Reason

Continuity of Care

* Requesting Provider

Brooks, Douglas

1234567893

CLEAR

* Requesting Provider Contact Name

John Doe

* Requesting Provider Contact Number

+ 1

(203) 444-5656

x9999

* Requesting Provider Fax Number

+ 1

(203) 444-5677

Servicing Provider Contact Name

Servicing Provider Contact Number

+ 1

(999) 999-9999

x9999

Servicing Provider Fax Number

+ 1

(999) 999-9999

Primary Procedure

THERAPEUTIC ULTRASOUND OF HEART

00.02

ICD9

CLEAR

Secondary diagnosis

SEARCH

+

BACK TO PRESCREEN

SUBMIT

CANCEL

While filling in the authorization details, if you return to the Prescreen page before you select Submit, but make no changes to the entries, you can return to Authorization Details without any loss of data. The entries you made remain intact.

To provide authorization details:

1. From the **Admission Type** menu, select the type of admission being requested.
2. From the **Admission Source** menu, select the admission source.
3. From the **Place of Service** menu, select the type of facility in which the service will be performed.
4. Enter the target discharge date in the format mm/dd/yyyy or use the date picker.
Depending on the configuration set by the payer, this field may be required or optional.
5. From the **Level of Urgency** list, select the urgency level.
If **Urgency Definition** is available, select it to see your organization's guidance on choosing urgency levels.

Your organization may require an attestation (acknowledgement that the selection is in compliance with the urgency definition). If so, an attestation window will display. Select **Yes** to attest. If you select No, TruCare ProAuth will revert your selection to your organization's configured value or back to blank.

6. From the **Out of Network Reason** menu, select the reason for requesting a facility that is out of network.

Note: This entry displays as required only when an out-of-network facility has been entered in prescreen.

7. Specify the requesting provider:

- a. Enter a minimum of two non-wildcard characters in the **Search by Provider name** or **Search by Provider NPI**.

The requesting provider is the entity that is requesting/ordering the service or admission for a member.

By default, searches include only providers associated with your user account. You might have the option to search all available providers by selecting **Search All Providers**. When using the **Search All Providers** option, use precise criteria to get the best search results; only 50 data entries are shown per search.

Note: When authorization requests are created, searches for requesting providers use all providers associated with your account (or all providers if you have the option to search all providers and select it), not solely the providers selected in the Provider Filter at a given time. For more information about providers and the Provider Filter, see [Applying a filter to your provider list](#) on page 111.

- b. Select **Search**.

If the characters you enter have a unique match, the fields are filled in automatically and you can skip the next step. Do an advanced search, if necessary.

- c. Select the provider from the list.

8. In the **Requesting Provider Contact Name** field, enter the contact name specified by the provider.
9. Enter the requesting provider contact number for the authorization, including the country code and extension, if any.
10. Enter the requesting provider fax number, including the country code.
11. In the **Servicing Provider Contact Name** field, enter the contact name specified by the provider.
12. Enter the servicing provider contact number for the authorization, including the country code and extension, if any.
13. Enter the servicing provider fax number, including the country code.

14. Specify the primary procedure using the following steps:

 **Note:** These fields might already be populated, if the information was supplied in prescreen.

- a. Enter a minimum of two characters in the **Search by Procedure name** or **Search by Code** and select **Search**.

Use precise criteria to get the best search results; only 50 data entries are shown per search.

To refine your search, select **Name contains** or **Name starts with**, enter your new search term, then select **Search**.

If the characters you enter match a single record, the fields are filled in automatically and you can skip the next step.

- b. Choose the correct record (procedure name, code, code set) in the search results, scrolling through the list if needed.

The code set includes the procedure coding schemes defined in TruCare.

If necessary, select **Clear** to start over.

You might see a message about a procedure code being expired. For more information about expired codes, see [Expired diagnosis or procedure codes](#) on page 121.

15. Specify a secondary procedure (or more than one) if needed, using the following steps:

- a. Enter a minimum of two characters in the **Search by Procedure name** or **Search by Code** and select **Search**.

Use precise criteria to get the best search results; only 50 data entries are shown per search.

To refine your search, select **Name contains** or **Name starts with**, enter your new search term, then select **Search**.

If the characters you enter match a single record, the fields are filled in automatically and you can skip the next step.

- b. Choose the correct record (procedure name, code, code set) in the search results, scrolling through the list if needed.

The code set includes the procedure coding schemes defined in TruCare.

If necessary, select **Clear** to start over (see image below).

You might see a message about a procedure code being expired. For more information about expired codes, see [Expired diagnosis or procedure codes](#) on page 121.

Note: Select **+** to add another secondary procedure.

16. If you need to add a note or attachment, do so now.
See [Adding notes and attachments to authorization requests](#) on page 85 for details.

If you try to submit the request without adding a required note or attachment, a message that a note or attachment is required appears on the screen.

17. If you need to add clinical criteria, do so now.
See [Adding clinical criteria to authorization requests](#) on page 87 for details.

If you try to submit the request or navigate to the next page without adding required clinical criteria, messages that clinical criteria are required or optional appear on the screen.

18. Depending on your organization's workflow, the standard inpatient workflow will allow **Submit**. Select **Submit** when you are ready to submit the authorization request. When configured, a message informs you that the authorization request has been submitted successfully. If the authorization has clinical criteria, a pop-up indicates that the authorization is being submitted.

It will close when the submission is complete. An authorization summary is displayed and includes the authorization number and status.

Create Inpatient Authorization			
<div><div></div><div></div><div></div></div>			
Prescreen		Authorization Details	
Authorization Number IP0000006823	Authorization Status Pending	Admission Date 02/18/2019	Requested Days 1
Servicing Facility Dallas Medical Center	Primary Diagnosis Erysipelas (A46)	Primary Procedure Code	Criteria Status Completed
<div><div>RETURN TO MEMBER SEARCH</div><div>RETURN TO DASHBOARD</div><div>PRINT</div></div>			

The criteria status field appears only if clinical criteria are created for the authorization.

You can print a copy of the confirmation for your records. The confirmation prints to PDF using the browser print function. Return to member search or to the dashboard.

If your organization is using the inpatient comprehensive workflow, you can use the Procedure Prescreen when the inpatient admission includes procedures that will be performed during the inpatient stay. You can also click **Next**, which will navigate the workflow directly to the Review page if no procedures are planned or known.

Completing the IP procedure prescreening

Complete the Procedure Prescreen immediately to learn the classification of IP procedure(s) request. This is part of the comprehensive Inpatient workflow.

Create Inpatient Authorization

Admission Prescreen

Admission Details

Procedures Prescreen

Procedure Details

Review

Authorization Confirmation

Inpatient Summary

Primary Diagnosis	Admission Date	Requested Days	From Date	End Date
Panniculitis affecting regions of neck and back, lumbar region (M5406)	02/21/2022	2	02/21/2022	02/23/2022

* Start Date

02/21/2022

MM/DD/YYYY

* End Date

02/21/2022

MM/DD/YYYY

* Member's Applied Eligibility

WL_TANF

* Service Type

Surgical

* Place of Service

Inpatient Hospital

* Servicing Provider

Maldonado, Anna

Search by Provider name

(OR) Search by Provider NPI

CLEAR

Provider Specialty

Chiropractic

Servicing Provider selected is out of network.

* Requested Units

1

* Unit Type

Units

* Procedure Code

ELECTROMYOGRAP

E0746

HCP

CLEAR

* Requested Units

1

* Unit Type

Units

* Procedure Code

PROBE, PERCUTAN

C2614

HCP

CLEAR

+

NEXT

CANCEL / BACK TO REVIEW SUMMARY

The procedure prescreen functionality immediately provides the classification of an inpatient procedure. If required, you can proceed with the workflow. If not required, or if another business evaluation occurs, a message informs you of the next action to take.

You might see messages while completing the Procedure Prescreen section. For more information about the messages, see [Prescreen messages](#) on page 36.

To complete the Procedure Prescreen section:

1. Enter the **Service start date** in the format mm/dd/yyyy or use the date picker. The procedure start date will automatically default to the admission date entered on Admission prescreen. This date may be edited with the inpatient length of stay time frame From and End dates labeled in the Inpatient Summary section.
2. Enter the **Service end date** in the format mm/dd/yyyy or use the date picker. The procedure end date will automatically default to the admission date entered on Admission prescreen. This date may be edited with the inpatient length of stay time frame From and End dates labeled in the Inpatient Summary section.

3. From the **Member's Applied Eligibility** menu, make a selection.
This field auto-completes when the member's eligibility is on record.
4. Select the service type from the **Service Type** menu.
5. Select the place of service from the **Place of Service** menu.
6. Specify the information for the **Servicing Provider** search box using the following steps:
 - a. Enter a minimum of two characters in the **Search by Provider name** or **Search by Provider NPI** and select **Search**.
 - b. If the characters you enter have a unique match, the fields are filled in automatically and you can skip the next step.

This search is checked against the full TruCare provider database. If you search using the dashboard provider filter, you are limited to only those facilities associated with your user account.
7. Select the provider specialty from the **Provider Specialty** menu (optional).
If the provider does not have a specialty, this field is not displayed. If the provider has only one specialty, the field is automatically populated with it.
8. If necessary, select **Clear** to start over.
9. In the **Requested Units** field, type the number of requested units or use the scroll arrows to enter requested days.

The count must be at least 1 (one).
10. From the **Unit Type** menu, make a selection.

11. Specify the procedure:

- a. Enter a minimum of two characters in the **Search by Procedure name** or **Search by Code**, optionally choose a code set from the drop-down menu, and select **Search**.

Use precise criteria to get the best search results; only 50 data entries are shown for each search.

If the characters you enter match a single record, the fields are filled in automatically and you can skip the next step.

If your search did not result in a match, a slider opens with search results. To refine your search, select **Name contains** or **Name starts with**, enter your new search term in **Search by Procedure name** or **Search by Code**, optionally select a code set, and select **Search**.

- b. Choose the correct record (procedure name, code, code set) in the search results, scrolling through the list if needed.

The code set includes the procedure coding schemes defined in TruCare.

If necessary, select **Clear** to start over.

You might see a message about a procedure code being expired. For more information about expired codes, see [Expired diagnosis or procedure codes](#) on page 121.



Note: Select **+** to add another inpatient procedure that has the same dates of service, service type, and servicing provider. If there is a different date of service, service type, or servicing provider, you can add another service from the review page. For additional information, see [Adding an IP Service](#).

12. Select **Next**.

The Procedure prescreen information is processed. If you can proceed with the Inpatient procedure(s) requested, you automatically continue to the Procedure Details page where you can add more details.

You might see a message with additional information about the Inpatient Procedure requested. Click **Next** again to continue to the Authorization Details page.

Sometimes the results of the prescreen evaluation prevent you from continuing with the Inpatient Procedure requested, for one of the following reasons and the message will display with a red font:

- Authorization is not required
- Duplicate request
- Review needed by a third party
- Member ineligibility

When one inpatient procedure is requested and results with one of the above results, Select **Cancel/Back to Review Summary** so that you may continue with the Inpatient Authorization request.

In the example below, there are multiple prescreen results where one result is "IP Auth is required" (dark gray text) and the other result is "IP Auth is not required" (red text). In order to proceed with the authorization, you need to remove the "IP Auth is not required" procedure. Hint text appears when you hover over the information icon or any part of the message. The **Next** button is disabled until you remove the procedure that is not

required. Click the trashcan icon to remove the procedure not requiring authorization. The **Next** button is then enabled.

The screenshot displays the ProAuth interface for creating an IP authorization request. It shows two procedure entries in a list. The first entry has a message "ProAuth - IP Auth is required." and a trash icon. The second entry has a message "ProAuth Reason - IP Auth is not required" in red, a trash icon, and a plus icon. At the bottom of the interface are two buttons: "NEXT" and "CANCEL / BACK TO REVIEW SUMMARY".

Each entry includes the following fields:

- * Requested Units:** 1
- * Unit Type:** Units (with a dropdown arrow)
- * Procedure Code:** PLMT SCJNCL RTA PRC (with a search icon) and 0100T (with a search icon)
- HCPC:** HCPC (with a dropdown arrow)
- CLEAR** button
- Trashcan icon**
- Plus icon** (only on the second entry)

Below the entries, there is a link: [Remove procedure to continue to next page](#)

Providing the IP procedure details

After completing the Procedure Prescreen evaluation, provide IP procedure details on the Authorization Details page.

You will see the prescreen entries displayed as view only in the Procedure Prescreen section when the Procedure Details page opens.

Create Inpatient Authorization

Admission Prescreen

Admission Details

Procedures Prescreen

Procedure Details

Review

Authorization Confirmation

Procedures Prescreen

Start Date 02/21/2022	End Date 02/21/2022	Primary Diagnosis Panniculitis affecting regions of neck and back, lumbar region (M5406)	Member's Applied Eligibility WI_TANF
Service Type Surgical	Place of Service Inpatient Hospital	Servicing Provider Maldonado, Anna	
Inpatient Procedure(s)	Requested Units		
ELECTROMYOGRAPHY (EMG), BIOFEEDBACK DEVICE (E0746)	1 Units		
PROBE, PERCUTANEOUS LUMBAR DISCECTOMY (C2614)	1 Units		

Procedure Details

Level of Urgency
Non-Urgent

* Out of Network Reason
Continuity of Care

Treatment Type
Service/Procedure

* Requesting Provider

Brooks, Douglas

1234567893

CLEAR

Search by Provider name

(OR) Search by Provider NPI

* Requesting Provider Contact Name

Sue Smith

* Requesting Provider Contact Number

+ 1

(982) 039-4823

x9999

* Requesting Provider Fax Number

+ 1

(209) 248-2098

Servicing Provider: Maldonado, Anna

Servicing Provider Contact Name

Jane Thomas

Servicing Provider Contact Number

+ 1

(249) 820-4982

x9999

Servicing Provider Fax Number

+ 1

(230) 439-8209

NEXT

BACK TO PRESCREEN

CANCEL / BACK TO REVIEW SUMMARY

If you need to edit something in the Procedure Prescreen section, you have to go back to the Prescreen page to enter the change. Select **Back to Prescreen**. After any change, prescreen runs again when you select **Next** to determine whether procedure is required.

To provide procedure details:

1. From the **Level of Urgency** list, select the urgency level.

If **Urgency Definition** is available, select it to see your organization's guidance on choosing urgency levels.

Your organization may require an attestation (acknowledgement that the selection is in compliance with the urgency definition). If so, an attestation window will display. Select **Yes** to attest. If you select No, TruCare ProAuth will revert your selection to your organization's configured value or back to blank.

2. From the **Out of Network Reason** menu, select the reason for requesting a facility that is out of network.

Note: This entry displays as required only when an out-of-network provider has been entered in prescreen.

3. From the **Treatment Type** menu, select the type of treatment being requested.
4. View the Requesting Provider and contact information that are carried forward from the Admission details page. This information displays in view only mode.
5. In the **Servicing Provider Contact Name** field, enter the contact name specified by the provider.
6. Enter the servicing provider contact number for the authorization, including the country code and extension, if any.
7. Enter the servicing provider fax number, including the country code.
8. Specify a secondary diagnosis (or more than one) if needed, using the following steps:

- a. Enter a minimum of two characters in the **Search by Diagnosis name** or **Search by Code** and select **Search**.

Use precise criteria to get the best search results; only 50 data entries are shown per search.

To refine your search, select **Name contains** or **Name starts with**, enter your new search term, then select **Search**.

If the characters you enter match a single record, the fields are filled in automatically and you can skip the next step.

- b. Choose the correct record (diagnosis name, code, code set) in the search results, scrolling through the list if needed.

The code set includes the diagnosis coding schemes defined in TruCare.

If necessary, select **Clear** to start over.

You might see a message about a diagnosis code being expired. For more information about expired codes, see [Expired diagnosis or procedure codes](#) on page 121.

Note: Select **+** to add another secondary diagnosis.

- If you need to add a note or attachment, do so now.

See [Adding notes and attachments to authorization requests](#) on page 85 for details.

If you try to submit the request without adding a required note or attachment, a message that a note or attachment is required appears on the screen.

- Select **Next** and you are moved to the Review page to review inpatient admission and inpatient services.

Reviewing the IP authorization

After providing IP procedure details, you can review and make any needed changes.

The Review page provides Admission details and Inpatient procedure details. This page contains edit and remove (when there are inpatient procedures) functions to help you ensure the accuracy of an authorization before submission..

Create Inpatient Authorization

Admission Prescreen

Admission Details

Procedures Prescreen

Procedure Details

Review

Authorization Confirmation

Inpatient Line

Admission Date: 02/21/2022

Primary Diagnosis Code: M5406

EDIT

Inpatient Procedures

Service Type: Surgical

Procedure Code: ELECTROMYOGRAPHY (EMG), BIOFEEDBACK DEVICE (E0746)

REMOVE

EDIT

Service Type: Surgical

Procedure Code: PROBE, PERCUTANEOUS LUMBAR DISCECTOMY (C2614)

REMOVE

EDIT

ADD SERVICE

SUBMIT

CANCEL

To review/make changes to services and submit the authorization request:

- Review the Inpatient admission and any inpatient procedures that are entered on the page.

Note: Make sure that your entries are accurate. You cannot edit an authorization request after you submit it.

2. If any of the following changes are needed, use the appropriate instructions.

Select this option...	To do this...
Edit	To edit an inpatient procedure on the page. See the instructions in Editing an IP procedure or service on page 53.
Remove	To remove an inpatient procedure on the page. This button is available if there is more than one service listed. See the instructions in Removing an IP procedure or service on page 53.
Add Service	Add an inpatient procedure or service to the request. See the instructions in Adding an IP procedure or service on page 52.

3. When you are done reviewing services and ready to submit the authorization request, select **Submit**.

When configured, a custom message from your organization will display at the top of the page. An authorization summary is displayed and includes the authorization number for the admission and a status for each inpatient procedure included on the authorization..

Create Inpatient Authorization

Admission Prescreen

Admission Details

Procedures Prescreen

Procedure Details

Review

Authorization Confirmation

Authorization Number IP0001005258	Admission Date 02/21/2022	Primary Diagnosis Panniculitis affecting regions of neck and back, lumbar region (M5406)	Servicing Facility Dallas Medical Center	Requesting Provider Brooks, Douglas
---	-------------------------------------	--	--	---

Inpatient Admission Summary

Status Pending	Requested Days 2	Primary Procedure Code
--------------------------	----------------------------	-------------------------------

Procedure 1 ELECTROMYOGRAPHY (EMG), BIOFEEDBACK DEVICE (E0746)	Service Type Surgical	Servicing Provider Maldonado, Anna
Status Pending	Units 1	Unit Type Units
Start Date 02/21/2022	End Date 02/21/2022	
Procedure 2 PROBE, PERCUTANEOUS LUMBAR DISCECTOMY (C2614)	Service Type Surgical	Servicing Provider Maldonado, Anna
Status Pending	Units 1	Unit Type Units
Start Date 02/21/2022	End Date 02/21/2022	

RETURN TO MEMBER SEARCH

RETURN TO DASHBOARD

PRINT

You can print a copy of the confirmation for your records. The confirmation prints to PDF using the browser print function.

Return to member search or to the dashboard.

Adding an IP procedure or service

You can add an inpatient procedure or service when creating or extending an IP authorization request from the Review page.

When adding a procedure or service from the Review page, you are returned to the Procedure Prescreen page.

See these topics to complete this workflow:

- [Completing the IP procedure prescreening on page 43](#)
- [Providing the IP procedure details on page 47](#)
- [Reviewing the IP authorization on page 50](#)

Removing an IP procedure or service

You can remove an inpatient procedure or service from the Review page.

1. To remove, select the **Remove** button on the inpatient procedure you want to remove.
2. Select **Yes** in the confirmation prompt. The inpatient procedure is removed from the Review page, where you can finish reviewing and submit the authorization.

Editing an IP procedure or service

You can edit an inpatient procedure or service from the Review page.

When editing from the Review page, you are returned to the Procedure Prescreen page. Edits are subject to prescreen evaluation. Complete the entries and, if authorization is required, advance to the Procedure Details page.

You can edit specific information on the Procedure details page (Requesting provider and contact information are not editable on this page). When you are done, click **Next** to advance to the Review page.

Adding an IP procedure

If the inpatient comprehensive workflow is supported, you can add inpatient procedure(s) or service(s) to an open IP authorization request. This workflow offers convenience and work/time efficiencies.

In the Add Service workflow, you can only add procedure(s) that are occurring during the inpatient hospital stay.

From the inpatient summary table on the dashboard, select the authorization.

Dashboard

CREATE INPATIENT AUTHORIZATION

CREATE SERVICE/PROCEDURE AUTHORIZATION

Filter By

Include Closed: No | From Date: 03/02/2022

Inpatient Authorizations Summary

ADD SERVICE

EXTEND

VIEW AUTH DETAILS

Member Name	Authorization #	Determination S...	From Date	To Date	Servicing Facility	Diagnosis Code	State
Rousseau, Danie...	IP0001004701	Pending	03/08/2022	03/24/2022	Abbott, Sandra	E008.1	Open
Rousseau, Danie...	IP0001004675	Pending	03/07/2022	03/09/2022	Abbott, Sandra	E008.0	Open
Rousseau, Danie...	IP0001004325	Pending	03/03/2022	03/09/2022	Dallas Medical C...	111.1	Open
Rousseau, Danie...	IP0001004475	Pending	03/03/2022	03/09/2022	Dallas Medical C...	A000	Open
Bertram, Michae...	IP0001004512	Pending	03/03/2022	03/07/2022	Dallas Medical C...	A009	Open

Click **Add Service**, the form navigates directly to the **Procedure Prescreen** page.

See the following sections to complete this workflow:

- Completing the IP procedure prescreening
- Providing the IP procedure details
- Reviewing the IP authorization

Extending an IP authorization

You can extend an open IP authorization request. The extend function includes standard or comprehensive workflow that offers convenience and work/time efficiencies.

In the Extend workflow, you can only extend a stay as related to the existing authorization. Not all fields of the authorization request form can be edited, because some fields default from the initial authorization. For example, you cannot change the primary diagnosis. For any new episode of care, create another IP authorization request.

All IP authorizations that you extend require prescreen evaluation.

When extending IP authorization requests, you might need to submit detailed notes or upload more attachments to justify the specific request. Specification is set by the payer. In such instances, text messages are displayed in the workflow to inform you of the exact requirements. Look for these directions on the Authorization Details page.

Note: Review the following information.

- Before submitting an authorization request, you can extend an existing stay only once, but you can make multiple extensions on a single authorization. Each extend submission creates a distinct line item on the authorization request.
- You can edit information added during the extend workflow only before you submit the request.

As you proceed through the workflow, the header on the screens reflects the type of authorization request you are creating: Extend Inpatient Authorization for medical IP Authorization requests or Extend Inpatient

Behavioral Health Authorization for behavioral health IP Authorization requests. You can also see where you are in the main parts of the workflow: Prescreen, Authorization Details, or Authorization Confirmation.

The standard authorization extension workflow involves the following high-level tasks:

1. Start an authorization request extension.
2. Complete the Prescreen section of the extension.
3. Complete the Authorization Details section of the extension and submit it.



Note: The option values shown in the workflow topics in this section are illustrative only.

The comprehensive authorization extension workflow involves the following high-level tasks:

1. Start an authorization request extension.
2. Complete the Admission Prescreen section of the extension.
3. Complete the Admission Details section of the extension.
4. Complete the Procedure Prescreen section if an Inpatient Procedure is needed or click **Next** to go the Review page.
5. Click **Submit**.

Topics in this section

[Starting an IP authorization extension](#) on page 55

Initiate an IP authorization extension from the dashboard summary table.

[Completing the extend IP authorization prescreening](#) on page 56

Complete the Prescreen page to determine if you can proceed with the IP authorization extension.

[Completing the extend IP authorization details](#) on page 57

When extending an IP authorization, after completing the prescreen evaluation, provide additional information on the Authorization Details page.

Starting an IP authorization extension

Initiate an IP authorization extension from the dashboard summary table.

The IP authorizations that you can extend appear in the IP Authorizations Summary table on the dashboard.

To start an authorization extension:

1. Go to the IP Authorizations Summary on the dashboard and select the authorization on which you are extending a stay.

Inpatient Authorizations Summary								
							EXTEND	VIEW AUTH DETAILS
	Member Name	Authorization #	Determination Stat...	From Date	To Date	Servicing Facility	Diagnosis Code	State
	Ford, James	IP0000000926	Pending	02/14/2018	02/16/2018	Dallas Medical Center	436	Open
	Ford, James	IP0000000688	Pending	01/31/2018	02/01/2018	Andover Cardiac Fac...	100.81	Open
👤	Bob, Gregory V	IP0000000513	Pending	01/30/2018	02/02/2018	Dallas Medical Center	003.29	Open

2. Select **Extend**.

You advance to the Prescreen page to enter data for the preliminary evaluation.

Completing the extend IP authorization prescreening

Complete the Prescreen page to determine if you can proceed with the IP authorization extension.

You can request continued stay for a patient in an inpatient treatment setting so that the payer is notified and has all the clinical information needed to make a determination.

Extend Inpatient Authorization

Prescreen

Authorization Details

Authorization Confirmation

* From Date

02/15/2019

MM/DD/YYYY

* Member's Applied Eligibility

TX_HMO

* Servicing Facility

Dallas Medical Center

4000000230

CLEAR

⚠ Servicing Facility selected is out of network.

Search by Provider name

(OR) Search by Provider NPI

* Primary Diagnosis

MALIGNANT NEOPLASM OF HEART

164.1

ICD9

CLEAR

Search by Diagnosis name

(OR) Search by Code

Primary Procedure

SEARCH

Search by Procedure name

(OR) Search by Code

* Stay Level

Medical

×

* Requested Days

2

Service Type

Medical Care

×

NEXT

CANCEL

To provide prescreen information for an authorization extension:

1. Complete the required fields on the Prescreen page.
For more information about working in this page, refer to the instructions in [Completing the IP authorization prescreening](#) on page 33.
2. Select **Next**.

You advance to the Authorization Details page if authorization is required. Provide additional details on that page.

When no authorization is required, an explanation appears. Additional comments might follow the reason if the payer has more information on the specific authorization request.

You cannot proceed if the member is ineligible or if the authorization request is identified as a duplicate.

Completing the extend IP authorization details

When extending an IP authorization, after completing the prescreen evaluation, provide additional information on the Authorization Details page.

The editable fields on the Authorization Details page are optional. You might be required to add a note, attachment, or both.

The screenshot shows the 'Extend Inpatient Authorization' form with the 'Authorization Details' tab selected. The form includes a progress bar at the top with three steps: 'Prescreen' (completed), 'Authorization Details' (current), and 'Authorization Confirmation'. Below the progress bar, the form contains several sections:

- Admission Type:** A dropdown menu set to 'Emergency'.
- Admission Source:** A dropdown menu set to 'Transfer from Another Health Care'.
- * Place of Service:** A dropdown menu set to 'Inpatient Hospital'.
- Target Discharge Date:** A date field set to '02/15/2019' with a calendar icon.
- Level of Urgency:** A dropdown menu set to 'Emergency'.
- * Out of Network Reason:** A dropdown menu set to 'Continuity of Care'.
- * Requesting Provider:** A section with two input fields: 'Brooks, Douglas' and '1234567893'. Below these are search options: 'Search by Provider name' and '(OR) Search by Provider NPI'. A 'CLEAR' button is also present.
- * Requesting Provider Contact Name:** An input field containing 'Douglas Brooks'.
- * Requesting Provider Contact Number:** An input field with a country code dropdown set to '+1' and a number field containing '(222) 222-2223'.
- * Requesting Provider Fax Number:** An input field with a country code dropdown set to '+1' and a number field containing '(222) 222-2224'.
- Servicing Provider Contact Name:** An empty input field at the bottom.

 At the bottom of the form are three buttons: 'BACK TO PRESCREEN', 'SUBMIT', and 'CANCEL'.

To complete the authorization details section:

1. Complete fields on the page as needed.
For more information about working in this page, refer to the instructions in [Providing the IP authorization details](#) on page 37.
2. Add any notes or attachments that are required.
For more information, see [Adding notes and attachments to authorization requests](#) on page 85.
3. Add clinical criteria if required.
For more information, see [Adding clinical criteria to authorization requests](#) on page 87.

4. Select **Submit**.

You move to the Authorization Confirmation page. This page displays the authorization status of the IP Extension. In this example, the status is Pending.

Extend Inpatient Authorization			
<div><div></div><div></div><div></div></div>			
Prescreen		Authorization Details	
Authorization Number IP0000041631	Authorization Status Pending	Extension Start Date 02/15/2019	Requested Days 3
Servicing Facility Dallas Medical Center	Primary Diagnosis MALIGNANT NEOPLASM OF HEART (164.1)	Primary Procedure Code	
<div><div>RETURN TO MEMBER SEARCH</div><div>RETURN TO DASHBOARD</div><div>PRINT</div></div>			

You can print the authorization request for the new line item from the Authorization Confirmation page. A printed copy of the authorization request includes authorization summary, authorization details, and details of each line item. The member in focus prints on each page.

Adding IP procedure(s) during Extend workflow

For the inpatient comprehensive workflow, you can add inpatient procedure(s) performed during the inpatient stay. After admission details, follow the steps for [Completing the IP procedure prescreening](#) on page 43 and [Providing the IP procedure details](#) on page 47.

You can also click **Next**, which will navigate the workflow directly to the Review page, if no procedures are planned or known.

Topics in this section

[Reviewing the IP authorization extension](#) on page 59

The Review page provides inpatient extension details, including any inpatient procedure added. This page contains edit and remove functions (when there are one or more inpatient procedure) to help you ensure the accuracy of an authorization before submission.

Extend Inpatient Authorization

Admission Prescreen Admission Details Procedures Prescreen Procedure Details **Review** Authorization Confirmation

Inpatient Line

► Extend Date: 03/05/2022 Primary Diagnosis Code: A009 **EDIT**

Inpatient Procedures

► Service Type: Surgical Procedure Code: PHYSICAL THERAPY EVALUATION HIGH COMPLEX 45 MINS (97163) **REMOVE** **EDIT**

ADD SERVICE **SUBMIT** **CANCEL**

Reviewing the IP authorization extension

The Review page provides inpatient extension details, including any inpatient procedure added. This page contains edit and remove functions (when there are one or more inpatient procedure) to help you ensure the accuracy of an authorization before submission.

Extend Inpatient Authorization

Admission Prescreen Admission Details Procedures Prescreen Procedure Details **Review** Authorization Confirmation

Inpatient Line

► Extend Date: 03/05/2022 Primary Diagnosis Code: A009 **EDIT**

Inpatient Procedures

► Service Type: Surgical Procedure Code: PHYSICAL THERAPY EVALUATION HIGH COMPLEX 45 MINS (97163) **REMOVE** **EDIT**

ADD SERVICE **SUBMIT** **CANCEL**

To review or make changes to services and submit the authorization request:

1. Review the inpatient extension and any inpatient procedures.
2. To change an inpatient line procedure, select **Edit**.
3. To delete a procedure, select **Remove**.
4. If another inpatient procedure is needed, select **Add Service**.
5. When your review is complete, select **Submit** to submit the authorization request.

When configured, a custom message from your organization appears at the top of the page. An authorization summary appears that includes the authorization number for the admission and a status for

each inpatient procedure included in the authorization. Using the browser print function, you can print a copy of the confirmation for your records to PDF.

6. Return to member search or to the dashboard.

Creating an SP authorization request

You can create service/procedure (SP) authorization requests in the TruCare ProAuth dashboard.

You can create two types of service/procedure (SP) authorization requests: medical or behavioral health. If your organization does not support creation of behavioral health authorization requests, they are not enabled in TruCare ProAuth. The authorization request workflow is the same for both types of requests.

Throughout the workflow for submitting an SP authorization request, you must complete all mandatory fields marked with an asterisk. Authorizations might include User Defined Fields (UDFs). For more information about UDFs, see [UDF guidelines](#) on page 119.

As you proceed through the workflow, the header on the screens reflects the type of authorization request you are creating: Create Service/Procedure Authorization for medical SP authorization requests or Create Service/Procedure Behavioral Health Authorization for behavioral health SP authorization requests. You can also see where you are in the main parts of the workflow: Prescreen, Authorization Details, Services, or Confirmation.

The authorization creation workflow involves the following high-level tasks:

1. Start an authorization request.
2. Complete the SP authorization prescreen.
3. Complete the Authorization Details section of the request.
4. Review services and modify them as needed, then submit the authorization.



Note: The option values shown in the workflow topics in this section are illustrative only.

Topics in this section

[Starting an SP authorization request](#) on page 61

Initiate an SP authorization request on the dashboard.

[Completing the SP authorization prescreening](#) on page 61

Complete the prescreening to learn the classification of an SP authorization request immediately.

[Providing the SP authorization details](#) on page 65

After completing the prescreen evaluation, provide SP authorization request details on the Authorization Details page.

[Reviewing the SP authorization services](#) on page 68

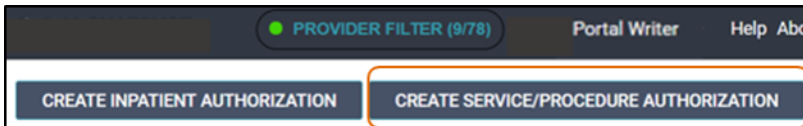
After providing SP authorization details, you can review the services and make any needed changes on the Services page.

Starting an SP authorization request

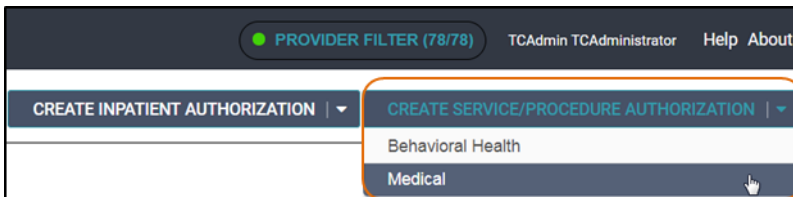
Initiate an SP authorization request on the dashboard.

Use one of the following actions on the dashboard to start creating an SP Authorization request. The available actions depend on whether behavioral health is enabled in TruCare ProAuth.

- If behavioral health is not enabled, select **Create Service/Procedure Authorization** (to create a medical authorization).



- If behavioral health is enabled, from the **Create Service/Procedure Authorization** menu, choose Behavioral Health or Medical.



The Prescreen page opens. Now you can add information for preliminary evaluation.

Completing the SP authorization prescreening

Complete the prescreening to learn the classification of an SP authorization request immediately.

In the first part of the authorization request process you provide prescreen information.

Create Service/Procedure Authorization

Prescreen

Authorization Details

Services

Confirmation

* Service Type

Diagnostic Lab

* Place of Service

Inpatient Hospital

* Primary Diagnosis

BENIGN NEOPLASM OF HEART

212.7

ICD9

CLEAR

Search by Diagnosis name

(OR) Search by Code

* Primary Procedure Code

THERAPEUTIC ULTRASOUND OF HEART

00.02

ICD9

CLEAR

Search by Procedure name

(OR) Search by Code

* Requested Units

1

* Unit Type

Days

* Start Date

01/17/2019

MM/DD/YYYY

* End Date

01/17/2019

MM/DD/YYYY

* Member's Applied Eligibility

WL_TANF

* Servicing Provider

Dallas Medical Center

4000000230

CLEAR

Search by Provider name

(OR) Search by Provider NPI

* Servicing Provider selected is out of network.

Provider Specialty

General Practice

NEXT

CANCEL

The prescreen evaluation can immediately provide you with the classification of an authorization request. If authorization is required, you can proceed with the workflow. If authorization is not required, or if another business evaluation occurs, a message informs you of the next action to take.

You might see messages while completing the Prescreen section. For more information about the messages, see [Prescreen messages](#) on page 36.

To complete the Prescreen section:

1. Select the service type from the **Service Type** menu.
2. Select the place of service from the **Place of Service** menu.

3. Specify the primary diagnosis using the following steps:

- a. Enter a minimum of two characters in the **Search by Diagnosis name** or **Search by Code**, optionally choose a code set from the drop-down menu, and select **Search**.

Use precise criteria to get the best search results; only 50 data entries are shown per search.

If the characters you enter match a single record, the fields are filled in automatically and you can skip the next step.

If your search did not result in a match, a slider opens with search results. To refine your search, select **Name contains** or **Name starts with**, enter your new search term in **Search by Diagnosis name** or **Search by Code**, optionally select a code set, and select **Search**.

- b. Choose the correct record (diagnosis name, code, code set) in the search results, scrolling through the list if needed.

The code set includes the diagnosis coding schemes defined in TruCare.

If necessary, select **Clear** to start over.

You might see a message about a diagnosis code being expired. For more information about expired codes, see [Expired diagnosis or procedure codes](#) on page 121.

4. Specify the primary procedure using the following steps:

Note: The fields may already include a default procedure code specified by your administrator for the selected service type. If you need to change the default procedure code, use these steps.

- a. Enter a minimum of two characters in the **Search by Procedure name** or **Search by Code**, optionally choose a code set from the drop-down menu, and select **Search**.

Use precise criteria to get the best search results; only 50 data entries are shown per search.

If the characters you enter match a single record, the fields are filled in automatically and you can skip the next step.

If your search did not result in a match, a slider opens with search results. To refine your search, select **Name contains** or **Name starts with**, enter your new search term in **Search by Procedure name** or **Search by Code**, optionally select a code set, and select **Search**.

- b. Choose the correct record (procedure name, code, code set) in the search results, scrolling through the list if needed.

The code set includes the procedure coding schemes defined in TruCare.

If necessary, select **Clear** to start over.

You might see a message about a procedure code being expired. For more information about expired codes, see [Expired diagnosis or procedure codes](#) on page 121.

5. In the **Requested Units** field, type the number of requested units or use the scroll arrows to enter requested days.
The count must be at least 1 (one).
6. From the **Unit Type** menu, make a selection.
7. Enter the service start date in the format mm/dd/yyyy or use the date picker.
8. Enter the service end date in the format mm/dd/yyyy or use the date picker.
9. From the **Member's Applied Eligibility** menu, make a selection.
This field auto-completes when the member's eligibility is on record.
10. Specify the servicing provider using the following steps:
 - a. Enter a minimum of two characters in the **Search by Provider name** or **Search by Provider NPI** and select **Search**.
If the characters you enter have a unique match, the fields are filled in automatically and you can skip the next step.

This search is checked against the full TruCare provider database. If you search using the dashboard provider filter, you are limited to only those facilities associated with your user account.
 - b. Select the provider from the list.
 - c. Select the provider specialty from the drop-down list (optional).
If the provider does not have a specialty, this field is not displayed. If the provider has only one specialty, the field is automatically populated with it.
If necessary, select **Clear** to start over.
11. Select **Next**.

The prescreen information is processed. If you can proceed with the authorization request, you automatically continue to the Authorization Details page, where you can add more details.

You might see a message with additional information about the request. Click **Next** again to continue to the Authorization Details page.

Sometimes the results of the prescreen evaluation prevent you from continuing with the authorization request, for one of the following reasons:

- Authorization is not required
- Duplicate request
- Review needed by a third party
- Member ineligibility

Select **Cancel** and then respond to the prompt to discard changes. Select **Yes** to return to the dashboard; select **No** to stay in the Prescreen page.

In the example below, the prescreen evaluation reports that “authorization is a duplicate” and instructs you to contact the payer. You cannot proceed.

Dashboard

Member Search

Widmore, Penelope

Member ID

M1000590000

Date of Birth (Age)

06/06/1974 (42 years)

Gender

Female

Active Eligibility

Yes

Policy #

POL0001590000

Product

CA_MC

Group #

Eligibility Effective Dates

01/01/2000 - 12/31/2025

Create Service/Procedure Authorization

Prescreen

Authorization Details

Services

Confirmation

Service Type

Medical Care

Place of Service

Inpatient Hospital

Primary Diagnosis

TEAR MEDIAL CARTILAGE OR MENISCUS KNEE CURRENT

836.0

ICD9

CLEAR

Primary Procedure Code

ARTHROSCOPY KNEE MENISCAL TRNSPLJ MED/LAT

29868

CPT

CLEAR

Requested Units

5

Unit Type

Months

Start Date

04/17/2017

End Date

09/16/2017

Member's Applied Eligibility

CA_MC

Servicing Provider

Brooks, Douglas

1234567893

CLEAR

Servicing Provider selected is out of network.

Authorization is a duplicate request. Please contact the payer for further assistance.

NEXT

CANCEL

Providing the SP authorization details

After completing the prescreen evaluation, provide SP authorization request details on the Authorization Details page.

When the Authorization Details page opens, you will see the prescreen entries displayed as view only near the top.

Dashboard

Member Search

IP Configuration

SP Configuration

Global Configuration

Bertram, Michael

Member ID

M1000040000

Date of Birth (Age)

05/02/1954 (64 years)

Gender

Male

Active Eligibility

Yes

Policy #

Create Service/Procedure Authorization

ADD NOTE

ADD ATTACHMENT (0)

Prescreen

Authorization Details

Services

Confirmation

Prescreen

Start of Service

01/17/2019

End of Service

01/17/2019

Primary Diagnosis

BENIGN NEOPLASM OF HEART (212.7)

Member's Applied Eligibility

WI_TANF

Servicing Provider

Dallas Medical Center

Primary Procedure

THERAPEUTIC ULTRASOUND OF HEART (00.02)

Requested Units

1 Days

Service Type

Diagnostic Lab

Place of Service

Inpatient Hospital

Authorization Details

If you need to edit something in the Prescreen section, you have to go back to the Prescreen page to enter the change. Select **Back to Prescreen**. After any change, prescreen runs again when you select **Next** to determine whether authorization is required.

Complete the authorization details fields in the rest of the Authorization Details page.

Create Service/Procedure Authorization

ADD NOTE

ADD ATTACHMENT (0)

Prescreen

Authorization Details

Services

Confirmation

Authorization Details

Level of Urgency

Urgent

✕

URGENCY DEFINITION

* Out of Network Reason

Provider Request

✕

Treatment Type

Service/Procedure

✕

* Requesting Provider

Brooks, Douglas

1234567893

CLEAR

Search by Provider name

(OR) Search by Provider NPI

* Requesting Provider Contact Name

Douglas Brooks

* Requesting Provider Contact Number

+ 1

(201) 555-1234

x9999

* Requesting Provider Fax Number

+ 1

(201) 555-1222

Servicing Provider Contact Name

Servicing Provider Contact Number

+ 1

(999) 999-9999

x9999

Servicing Provider Fax Number

+ 1

(999) 999-9999

Secondary diagnosis

SEARCH

+

Search by Diagnosis name

(OR) Search by Code

NEXT

BACK TO PRESCREEN

CANCEL

To provide authorization details:

- From the **Level of Urgency** list, select the urgency level.

If **Urgency Definition** is available, select it to see your organization's guidance on choosing urgency levels.

Your organization may require an attestation (acknowledgement that the selection is in compliance with the urgency definition). If so, an attestation window will display. Select **Yes** to attest. If you select No, TruCare ProAuth will revert your selection to your organization's configured value or back to blank.

- From the **Out of Network Reason** menu, select the reason for requesting a facility that is out of network.



Note: This entry displays as required only when an out-of-network facility has been entered in prescreen.

- From the **Treatment Type** menu, select the type of treatment being requested.

4. Specify the requesting provider using the following steps:

- a. Enter a minimum of two non-wildcard characters in the **Search by Provider name** or **Search by Provider NPI**.

The requesting provider is the entity that is requesting/ordering the service or admission for a member.

By default searches include only providers associated with your user account. You may have the option to search all available providers by selecting **Search All Providers**. When using the **Search All Providers** option, use precise criteria to get the best search results; only 50 data entries are shown per search.

i Note: When authorization requests are created, searches for requesting providers use all providers associated with your account (or all providers if you have the option to search all providers and select it), not solely the providers selected in the Provider Filter at a given time. For more information about providers and the Provider Filter, see [Applying a filter to your provider list](#) on page 111.

- b. Select **Search**.

If the characters you enter have a unique match, the fields are filled in automatically and you can skip the next step. Do an advanced search, if necessary.

- c. Select the provider from the list.

5. In the **Requesting Provider Contact Name** field, enter the contact name specified by the provider.
6. Enter the requesting provider contact number for the authorization, including the country code and extension, if any.
7. Enter the requesting provider fax number, including the country code.
8. In the **Servicing Provider Contact Name** field, enter the contact name specified by the provider.
9. Enter the servicing provider contact number for the authorization, including the country code and extension, if any.
10. Enter the servicing provider fax number, including the country code.

11. Specify a secondary diagnosis (or more than one) if needed, using the following steps:

- a. Enter a minimum of two characters in the **Search by Diagnosis name** or **Search by Code** and select **Search**.

Use precise criteria to get the best search results; only 50 data entries are shown per search.

To refine your search, select **Name contains** or **Name starts with**, enter your new search term, then select **Search**.


If the characters you enter match a single record, the fields are filled in automatically and you can skip the next step.

- b. Choose the correct record (diagnosis name, code, code set) in the search results, scrolling through the list if needed.

The code set includes the diagnosis coding schemes defined in TruCare.

If necessary, select **Clear** to start over.

You might see a message about a diagnosis code being expired. For more information about expired codes, see [Expired diagnosis or procedure codes](#) on page 121.

 **Note:** Select **+** to add another secondary diagnosis.

12. If you need to add a note or attachment, do so now.

See [Adding notes and attachments to authorization requests](#) on page 85 for details.

If you try to submit the request without adding a required note or attachment, a message that a note or attachment is required appears on the screen.

13. If you need to add clinical criteria, do so now.

See [Adding clinical criteria to authorization requests](#) on page 87 for details.

If you try to submit the request without adding required clinical criteria, messages that clinical criteria are required appear on the screen.

14. Select **Next** and you are moved to the Services page to review services.

Reviewing the SP authorization services

After providing SP authorization details, you can review the services and make any needed changes on the Services page.

The Services page contains add, edit, and remove (when there are multiple services) functions to help you ensure the accuracy of an authorization request before submission. The procedure details that you entered on the Authorization Details page display under a header that includes service type and procedure code. You can edit this primary service but not remove (discard) it. The criteria status field appears per line item only if clinical criteria are created for it.

Create Service/Procedure Authorization

Prescreen

Authorization Details

Services

Confirmation

Service Type: Diagnostic Lab

Procedure Code: THERAPEUTIC ULTRASOUND OF HEART (00.02)

Start Date: 01/17/2019

End Date: 01/17/2019

EDIT

Start Date 01/17/2019	End Date 01/17/2019	Requested Units 1 Days	Member's Applied Eligibility WI_TANF
Primary Procedure THERAPEUTIC ULTRASOUND OF HEART (00.02)	Service Type Diagnostic Lab	Servicing Provider Dallas Medical Center	Servicing Provider OON Reason Provider Request
Primary Diagnosis BENIGN NEOPLASM OF HEART (212.7)	Level of Urgency Urgent	Place of Service Inpatient Hospital	Treatment Type Service/Procedure
Requesting Provider Brooks, Douglas	Requesting Provider Contact Name Douglas Brooks	Requesting Provider Contact Number	Requesting Provider Fax Number (201) 555-1222
Criteria Status Completed			

ADD SERVICE

SUBMIT

CANCEL

To review/make changes to services and submit the authorization request:

1. Review the services on the page.

Note: Make sure that your entries are accurate. You cannot edit an authorization request after you submit it.

2. If any of the following changes are needed, use the appropriate instructions.

Select this option...	To do this...
Add Service	Add a service to the request. See the instructions in Adding or editing a service on page 70.
Edit	To edit a service on the page. See the instructions in Adding or editing a service on page 70.
Remove	To remove a service on the page. This button is available if there is more than one service listed. See the instructions in Removing a service on page 72.

3. When you are done reviewing services and ready to submit the authorization request, select **Submit**.

When configured, a message informs you that the authorization request has been submitted successfully. If the authorization has clinical criteria, a popup displays indicating that the authorization is being submitted. It will close when the submission is complete. An authorization summary is displayed and includes the authorization number and status. Criteria status fields appear for services in the authorization that have clinical reviews associated with them.

Create Service/Procedure Authorization			
<div> <div>Prescreen</div> <div>Authorization Details</div> <div>Services</div> <div>Confirmation</div> </div>			
Authorization Number OP0000004261		Primary Diagnosis Erysipelas (A46)	
		Requesting Provider California Hospital Medical Center	
Service 1			
Procedure TATTOOING INCL MICROPIGMENTATION 6.0 CM/< (11920)		Service Type Medical Care	
Status Pending		Units 2	
Start Date 03/26/2019		End Date 03/26/2019	
Criteria Status Completed		Servicing Provider California Hospital Medical Center	
		Unit Type Hours	
		Member's applied eligibility TX_FC	
<div> <div>RETURN TO MEMBER SEARCH</div> <div>RETURN TO DASHBOARD</div> <div>PRINT</div> </div>			

You can print a copy of the confirmation for your records. (The confirmation prints to PDF using the browser print function.)

Return to member search or to the dashboard.

Topics in this section

[Adding or editing a service on page 70](#)

You can add a new service or edit a prescreened service when creating an SP authorization request.

[Removing a service on page 72](#)

You can remove a service if you have at least two services associated with the SP authorization request.

Adding or editing a service

You can add a new service or edit a prescreened service when creating an SP authorization request.

When adding or editing a service from the Services page, you are returned to the Prescreen page. The additional service or change to a prescreened service is subject to evaluation to determine if authorization is required. Complete the entries and, if authorization is required, advance to the Authorization Details page.

To add or edit a service:

1. On the Services page, select **Add Service** or **Edit**.

You may have already done this and are on the Prescreen page, in which case you can ignore this step.

The Prescreen page opens.

2. Complete the required fields.

Note: You can edit all fields in prescreen with the possible exception of primary diagnosis. If the request includes more than one service, the primary diagnosis is read-only. If the request includes only one service, you can edit the primary diagnosis.

The Procedure fields may already include a default procedure code specified by your administrator for the selected service type. You can edit them and change the code. You might see a message about a procedure code being expired. For more information about expired codes, see [Expired diagnosis or procedure codes](#) on page 121.

For more information about the fields, see [Completing the SP authorization prescreening](#) on page 61.

3. Select **Next**.

If authorization is required, you proceed to Authorization Details.

If authorization is not required, select **Cancel/Back to Services Summary** to complete the authorization request. See [Reviewing the SP authorization services](#) on page 68 for the final step.

4. On the Authorization Details page, provide details as follows:

- a. From the **Level of Urgency** list, select a value.

If **Urgency Definition** is available, select it to see your organization's guidance on choosing urgency levels.

Your organization may require an attestation (acknowledgement that the selection is in compliance with the urgency definition). If so, an attestation window will display. Select **Yes** to attest. If you select No, TruCare ProAuth will revert your selection to your organization's configured value or back to blank.

- b. From the **Treatment Type** menu, select a value.

- c. If required, from the **Out of Network Reason** menu, select a value.

This is required if an out-of-network servicing provider was originally selected.

Note: The requesting provider and requesting provider name, number, and fax number are automatically entered.

For more information about the fields, see [Providing the SP authorization details](#) on page 65.

5. When you are done, select **Next**.

You proceed to the Services page, where you can review the services and submit the authorization. See [Reviewing the SP authorization services](#) on page 68 for details.

In this example, a second service has been added. (Note that only one service can be expanded at a time.) After you add one or more services, you can edit all of the services and remove all but one service.

Create Service/Procedure Authorization

Prescreen

Authorization Details

Services

Confirmation

Service Type: Consultation

Procedure Code: REPAIR UNSPEC SEPTAL DEFECT HEART W/TISSUE GRAFT (35.60)

Service Type: Diagnostic Lab

Procedure Code: THERAPEUTIC ULTRASOUND OF HEART (00.02)

Start Date: 01/17/2019

End Date: 01/17/2019

REMOVE

EDIT

Start Date	End Date	Requested Units	Member's Applied Eligibility
01/17/2019	01/17/2019	1 Days	WI_TANF
Primary Procedure	Service Type	Servicing Provider	Servicing Provider OON Reason
THERAPEUTIC ULTRASOUND OF HEART (00.02)	Diagnostic Lab	Dallas Medical Center	Provider Request
Primary Diagnosis	Level of Urgency	Place of Service	Treatment Type
BENIGN NEOPLASM OF HEART (212.7)	Urgent	Inpatient Hospital	Service/Procedure

ADD SERVICE

SUBMIT

CANCEL

Removing a service

You can remove a service if you have at least two services associated with the SP authorization request.

At least two services are required for the Remove function to be activated. When you have multiple services listed on the Services page, you can remove all services except one. The service that remains can be edited, but not removed.

To remove a service:

1. On the Services page, select the service you want to remove, then select **Remove**.

2. Select **Yes** in the confirmation prompt.

The service is removed from the Services page, where you can finish reviewing services and submit the authorization. See [Reviewing the SP authorization services](#) on page 68 for details.

Adding or extending an SP service

You can add a service or extend an existing service on an open SP authorization request. These workflows offer convenience and work/time efficiencies.

In the Add Service and the Extend workflows, you can only add or extend a service as related to the existing authorization. Not all fields of the authorization request form can be edited, because some fields default from the initial authorization. For example, you are unable to change the primary diagnosis. For any new episode of care, create another SP authorization.

All services that you add or extend require prescreen evaluation.



Note: Keep the following information in mind.

- Before submitting an authorization request, you can extend an existing service only once.
- Only services that you add or extend in a workflow can be edited (and possibly) removed before submitting the authorization request.
- An added or extended service must be created before the Remove function is activated on the Services page. (If you have only one added or extended service and you want to modify it, you can edit the line item. If you want to discard it, you can cancel the authorization.)

As you proceed through the workflow for adding or extending a service, the header on the screens reflects the type of authorization request you are creating: Extend Service/Procedure Authorization for medical SP Authorization requests or Extend Service/Procedure Behavioral Health Authorization for behavioral health SP Authorization requests. You can also see where you are in the main parts of the workflow: Prescreen, Authorization Details, Services, or Confirmation.

Note: The option values shown in the workflow topics in this section are illustrative only.

Topics in this section

[Adding a service to an existing SP authorization on page 74](#)

You can add a service to an SP authorization that has already been submitted.

[Extending a service on an existing SP authorization on page 79](#)

You can extend a service on an SP authorization that has already been submitted.

Adding a service to an existing SP authorization

You can add a service to an SP authorization that has already been submitted.

The workflow to add a service involves the following high-level tasks:

1. Start adding a service to the authorization.
2. Complete the Prescreen section.
3. Complete the Authorization Details section.
4. Review the services and submit the request.

Topics in this section

[Start adding a service to an SP authorization on page 74](#)

Initiate adding a service from the SP summary table on the dashboard.

[Completing the add service prescreening on page 75](#)

Complete the Prescreen page to determine if you can continue to add a service.

[Completing the add service authorization details on page 76](#)

When adding a service to an SP authorization, after completing the prescreen evaluation, provide additional information on the Authorization Details page.

[Reviewing services when adding a service on page 77](#)

Review services and edit them if needed.

Start adding a service to an SP authorization

Initiate adding a service from the SP summary table on the dashboard.

You must select a service in the summary table for the Add/Extend Service function to be active.

To start adding a service to the authorization:

1. Go to the SP Authorizations Summary on the dashboard and select the authorization to which you want to add a service.

In this example, the authorization request includes two services (line items 1 and 2).

Service / Procedure Authorizations Summary						
				ADD/EXTEND SERVICE		VIEW AUTH DETAILS
Member Name	Authorization #	Determination Status	Start Date	End Date	State	
⊕ Bertram, Michael	OP0000014543	Pending	01/18/2019	01/23/2019	Open	
Line Item	Start Date	End Date	Servicing Provider	Procedure Code and ...	Service Type	Status
1	01/18/2019	01/23/2019	Dallas Medical Center	33420 VALVOTOMY ...	Surgical	No Decision
2	01/22/2019	01/22/2019	Dallas Medical Center	00.02 THERAPEUTIC ...	Consultation	No Decision
Bertram, Michael OP0000014650 Pending 01/18/2019 01/21/2019 Open						

2. Select **Add/Extend Service**.

You are directed to the Services page. All line items for the authorization are displayed when the summary line is expanded.

Extend Service/Procedure Authorization

Prescreen

Authorization Details

Services

Confirmation

Service Type: Consultation

Procedure Code: THERAPEUTIC ULTRASOUND OF HEART (00.02)

EXTEND

Service Type: Surgical

Procedure Code: VALVOTOMY MITRAL VALVE CLOSED HEART (33420)

EXTEND

Line Item	Start Date	End Date	Requested Units	Status	Determined Units	Applied Eligibility	Servicing Provider Name	Servicing Provider NPI	Place Of Service
1	01/18/2019	01/23/2019	5 Days	Pending	0 Days	WL_TANF	Dallas Medical Center	4000000230	Inpatient Hospital

ADD SERVICE

SUBMIT

CANCEL

3. Select **Add Service**.

You advance to the Prescreen page to enter data for the preliminary evaluation of the new service request.

Completing the add service prescreening

Complete the Prescreen page to determine if you can continue to add a service.

Add required information in the prescreen fields to create a distinct service line item.

Extend Service/Procedure Authorization

Prescreen

Authorization Details

Services

Confirmation

* Service Type

Medical Care

×

▼

* Place of Service

Inpatient Hospital

×

▼

* Primary Diagnosis

CHAGAS DISEASE WITH HEART INVOLVEMENT

086.0

ICD9

CLEAR

Search by Diagnosis name

(OR) Search by Code

* Primary Procedure Code

INSERT LEFT HEART VENT BY THORACIC INC ECMO/EC

33988

CPT

CLEAR

Search by Procedure name

(OR) Search by Code

* Requested Units

3

* Unit Type

Days

×

▼

* Start Date

* End Date

* Member's Applied Eligibility

NEXT

CANCEL / BACK TO SERVICES SUMMARY

To complete the prescreen section:

1. Provide values in all of the required fields on the page.

For more information about providing information in these fields or messages you might see on the page, see [Completing the SP authorization prescreening](#) on page 61.

2. Select **Next**.

You advance to the Authorization Details page if authorization is required. Provide additional details on that page.

Completing the add service authorization details

When adding a service to an SP authorization, after completing the prescreen evaluation, provide additional information on the Authorization Details page.

Provide details in the fields on the page.

Extend Service/Procedure Authorization

ADD NOTE

ADD ATTACHMENT (0)

Prescreen

Authorization Details

Services

Confirmation

Authorization Details

Level of Urgency

URGENCY DEFINITION

* Out of Network Reason

Treatment Type

* Requesting Provider

Brooks, Douglas

1234567893

CLEAR

Search by Provider name

(OR) Search by Provider NPI

Requesting Provider Contact Name

Sam Smith

Requesting Provider Contact Number

+ 1

(202) 222-1234

x9999

Requesting Provider Fax Number

+ 1

(202) 222-1233

NEXT

BACK TO PRESCREEN

CANCEL / BACK TO SERVICES SUMMARY

To complete the authorization details section:

- Enter values in the required fields and in any of the optional fields that you want to use.
For more information about providing information in these fields or messages you might see on the page, see [Providing the SP authorization details](#) on page 65.

Note: If the authorization was created in TruCare and any of the fields are empty, you can add a value.

- Add any notes or attachments that are required.
For more information, see [Adding notes and attachments to authorization requests](#) on page 85.
- Add clinical criteria if required.
For more information, see [Adding clinical criteria to authorization requests](#) on page 87.
- Select **Next**.

You move on to the Services page, where you can review services.

Reviewing services when adding a service

Review services and edit them if needed.

On the Services page, review your entries to ensure that you are submitting accurate information.

Create Service/Procedure Authorization

Prescreen

Authorization Details

Services

Confirmation

Service Type: Diagnostic Lab

Procedure Code: THERAPEUTIC ULTRASOUND OF HEART (00.02)

Start Date: 01/17/2019

End Date: 01/17/2019

EDIT

Start Date 01/17/2019	End Date 01/17/2019	Requested Units 1 Days	Member's Applied Eligibility WI_TANF
Primary Procedure THERAPEUTIC ULTRASOUND OF HEART (00.02)	Service Type Diagnostic Lab	Servicing Provider Dallas Medical Center	Servicing Provider OON Reason Provider Request
Primary Diagnosis BENIGN NEOPLASM OF HEART (212.7)	Level of Urgency Urgent	Place of Service Inpatient Hospital	Treatment Type Service/Procedure
Requesting Provider Brooks, Douglas	Requesting Provider Contact Name Douglas Brooks	Requesting Provider Contact Number	Requesting Provider Fax Number (201) 555-1222
Criteria Status Completed			

ADD SERVICE

SUBMIT

CANCEL

To review services, edit if needed, and submit the request:

- Review the services on the page.
- If you need to modify a service, take appropriate action. If you do not need to make changes, continue to the next step.
 - If you need to edit a service you just added, select **Edit** and complete the following steps.
 - In the Prescreen page, you can edit all fields except service type, primary diagnosis, unit type, and servicing provider. When you finish, select **Next**.
 - You can edit any fields in Authorization Details. When you are done, select **Next** to return to the Services page.
 - You can remove a service that you just added only after you have created at least two additional services and the Remove button is displayed on each service line. Select **Remove** to discard any newly added service if it is not needed.
- After reviewing services, select **Submit** to submit your request.

- You may need to respond to an attestation which requires the information to be accurate and true. If accurate and true, select **Yes** to proceed. If not, select **No**, then select **Edit** to correct the entries before you attempt to submit the authorization request again.

Active Eligibility Yes	Primary Procedure ANTIBIOTIC PRESCRIBED OR DISPENSED (412)	Service Type Hospital - Outpatient	Servicing Provider LAC+USC Medical Center	Servicing Provider OON Reason Continuity of Care
Policy # PN100005	Primary Diagnosis ACNE VARIOLIFC	I certify the information being submitted is accurate and true.		Treatment Type Medicine Check
Product WL_SNIP	Requesting Provider Shephard, Christian	Requesting Provider Contact Name	Requesting Provider Contact Number	Requesting Provider Fax Number (555) 555-5556
Group # 674324243				

The Confirmation page displays the status of any new service that has been added and any existing service that has been extended.

Extend Service/Procedure Authorization

Prescreen

Authorization Details

Services

Confirmation

Authorization Number OP0000014543	Primary Diagnosis CHAGAS DISEASE WITH HEART INVOLVEMENT (086.0)	Requesting Provider Brooks, Douglas
Service 1		
Procedure INSERT LEFT HEART VENT BY THORACIC INC ECMO/ECLS (33988)	Service Type Medical Care	Servicing Provider Dallas Medical Center
Status Pending	Units 3	Unit Type Days
Start Date 01/25/2019	End Date 01/28/2019	Member's applied eligibility WL_TANF

RETURN TO MEMBER SEARCH

RETURN TO DASHBOARD

PRINT

You can print the authorization request for the new line item from the Confirmation page. A printed copy of the authorization request includes authorization summary, authorization details, and details of each line item. The member in focus prints on each page.

Return to member search or to the dashboard.

Extending a service on an existing SP authorization

You can extend a service on an SP authorization that has already been submitted.

Note: You can extend any service on an authorization only once before submission.

The workflow to extend a service involves the following high-level tasks:

1. Start extending a service on the authorization.
2. Complete the Prescreen section.
3. Complete the Authorization Details section.
4. Review the services and submit the request.

Topics in this section

[Start extending a service on an SP authorization](#) on page 80

Initiate extending a service from the SP summary table on the dashboard.

[Complete the extend service prescreening](#) on page 81

Complete the Prescreen page to determine if you can continue to extend a service.

[Complete the extend service authorization details](#) on page 82

When extending a service to an SP authorization, provide additional information on the Authorization Details page.

[Reviewing services when extending a service](#) on page 83

Review services and edit them if needed.

Start extending a service on an SP authorization

Initiate extending a service from the SP summary table on the dashboard.

You must select a service in the summary table for the Add/Extend Service function to be active.

To start extending a service on an authorization:

1. Go to the SP Authorizations Summary on the dashboard and select the authorization on which you are extending a service.

This example continues from the [adding a service example](#) on page 74. The authorization request includes two original services (line items 1 and 2) and the added service (line item 3).

Service / Procedure Authorizations Summary						
				ADD/EXTEND SERVICE		VIEW AUTH DETAILS
	Member Name	Authorization #	Determination Status	Start Date	End Date	State
	Bertram, Michael	OP0000014543	Pending	01/18/2019	01/28/2019	Open
Line Item	Start Date	End Date	Servicing Provider	Procedure Code and ...	Service Type	Status
1	01/18/2019	01/23/2019	Dallas Medical Center	33420 VALVOTOMY...	Surgical	No Decision
2	01/22/2019	01/22/2019	Dallas Medical Center	00.02 THERAPEUTIC ...	Consultation	No Decision
3	01/25/2019	01/28/2019	Dallas Medical Center	33988 INSERT LEFT...	Medical Care	No Decision
	Bertram, Michael	OP0000014650	Pending	01/18/2019	01/21/2019	Open

2. Select **Add/Extend Service**.

You are directed to the Services page.

Extend Service/Procedure Authorization

Prescreen Authorization Details Services Confirmation

Service Type: Consultation Procedure Code: THERAPEUTIC ULTRASOUND OF HEART (00.02) **EXTEND**

Line Item	Start Date	End Date	Requested Units	Status	Determined Units	Applied Eligibility	Servicing Provider Name	Servicing Provider NPI	Place Of Service
2	01/22/2019	01/22/2019	1 Visits	Pending	0 Visits	WL TANF	Dallas Medical Center	4000000230	Independent Clinic

Service Type: Medical Care Procedure Code: INSERT LEFT HEART VENT BY THORACIC INC ECMO/ECLS (33988) **EXTEND**

Service Type: Surgical Procedure Code: VALVOTOMY MITRAL VALVE CLOSED HEART (33420) **EXTEND**

ADD SERVICE **SUBMIT** **CANCEL**

3. Select the service and select **Extend**.

You advance to the Prescreen page to enter data for the preliminary evaluation of the service extension request.

Complete the extend service prescreening

Complete the Prescreen page to determine if you can continue to extend a service.

On the Extend SP Authorization prescreen, complete the required fields to create a distinct service line item.

Extend Service/Procedure Authorization

Prescreen

Authorization Details

Services

Confirmation

* Service Type

Consultation

* Place of Service

Office

* Primary Diagnosis

CHAGAS DISEASE WITH HEART INVOLVEMENT

086.0

ICD9

CLEAR

Search by Diagnosis name

(OR) Search by Code

* Primary Procedure Code

THERAPEUTIC ULTRASOUND OF HEART

00.02

ICD9

CLEAR

Search by Procedure name

(OR) Search by Code

* Requested Units

1

* Unit Type

Visits

* Start Date

* End Date

* Member's Applied Eligibility

NEXT

CANCEL / BACK TO SERVICES SUMMARY

To complete the prescreen section:

1. Provide values in all of the required fields on the page.

For more information about providing information in these fields or messages you might see on the page, see [Completing the SP authorization prescreening](#) on page 61.

2. Select **Next**.

You advance to the Authorization Details page if authorization is required. Provide additional details on that page.

Complete the extend service authorization details

When extending a service to an SP authorization, provide additional information on the Authorization Details page.

Provide details in the fields on the page.

To complete the authorization details section:

1. Enter values in the required fields and in any of the optional fields that you want to use.

For more information about providing information in these fields or messages you might see on the page, see [Providing the SP authorization details](#) on page 65.



Note: If the authorization was created in TruCare and any of the fields are empty, you can add a value.

2. Add any notes or attachments that are required.

For more information, see [Adding notes and attachments to authorization requests](#) on page 85.

3. Add clinical criteria if required.

If clinical criteria are required, a message **Clinical Criteria Required** appears on the top right corner of the screen. For more information, see [Adding clinical criteria to authorization requests](#) on page 87.

4. Select **Next**.

You move on to the Services page, where you can review services.

Reviewing services when extending a service

Review services and edit them if needed.

On the Services page, review your entries to ensure that you are submitting accurate information.

Extend Service/Procedure Authorization

Prescreen

Authorization Details

Services

Confirmation

Service Type: Consultation

Procedure Code: THERAPEUTIC ULTRASOUND OF HEART (00.02)

Start Date: 01/21/2019

End Date: 01/22/2019

EDIT

Start Date 01/21/2019	End Date 01/22/2019	Requested Units 1 Visits	Member's Applied Eligibility WI_TANF
Primary Procedure THERAPEUTIC ULTRASOUND OF HEART (00.02)	Service Type Consultation	Servicing Provider Dallas Medical Center	Servicing Provider OON Reason Continuity of Care
Primary Diagnosis CHAGAS DISEASE WITH HEART INVOLVEMENT (086.0)	Level of Urgency Non-Urgent	Place of Service Office	Treatment Type Service/Procedure

ADD SERVICE

SUBMIT

CANCEL

To review services, edit if needed, and submit the request:

1. Review the services on the page.

2. If you need to modify a service, take appropriate action. If you do not need to make changes, continue to the next step.

-
- If you need to edit a service you just added, select **Edit** and complete the following steps.
 - In the Prescreen page, you can edit all fields except service type, primary diagnosis, unit type, and servicing provider. When you finish, select **Next**.
 - If you make changes to admission date, primary diagnosis, requesting provider (only Cite AA) or procedure code (only when BRE rule is configured), it will impact the clinical criteria of the SP line.

Note: The clinical criteria may also be affected if the user modifies these fields in the Admissions Details screen.

When you make changes on the Prescreen page that impact clinical criteria, the message appears:

You have made changes to this page. A clinical criteria submission is either in progress or completed and will be discarded. Would you like to proceed?

Select **Yes** to discard the existing clinical review and go to the Review screen when you click **Next**. Select **No** to retain the user on the Admission Prescreen and not discard the changes.

- You can edit any fields in Authorization Details. When you are done, select **Next** to return to the Services page.
 - You can remove a service that you just added only after you have created at least two additional services and the Remove button is displayed on each service line. Select **Remove** to discard any newly added service if it is not needed.
3. After reviewing services, select **Submit** to submit your request.
4. You may need to respond to an attestation which requires the information to be accurate and true. If accurate and true, select **Yes** to proceed. If not, select **No**, then select **Edit** to correct the entries before you attempt to submit the authorization request again.

Active Eligibility Yes	Primary Procedure ANTIBIOTIC PRESCRIBED OR DISPENSED (412)	Service Type Hospital - Outpatient	Servicing Provider LAC+USC Medical Center	Servicing Provider OON Reason Continuity of Care
Policy # PN100005	Primary Diagnosis ACNE VARIOLIFC	I certify the information being submitted is accurate and true.		Treatment Type Medicine Check
Product WL_SNP	Requesting Provider Shepard, Christian	Requesting Provider Contact Name	Requesting Provider Contact Number	Requesting Provider Fax Number (555) 555-5556
Group # 674324243				

The Confirmation page displays the status of any new service that has been added and any existing service that has been extended.

Extend Service/Procedure Authorization		
<div> <div>Prescreen</div> <div>Authorization Details</div> <div>Services</div> <div>Confirmation</div> </div>		
Authorization Number OP0000014543	Primary Diagnosis CHAGAS DISEASE WITH HEART INVOLVEMENT (086.0)	Requesting Provider Brooks, Douglas
Service 1		
Procedure THERAPEUTIC ULTRASOUND OF HEART (00.02)	Service Type Consultation	Servicing Provider Dallas Medical Center
Status Pending	Units 1	Unit Type Visits
Start Date 01/21/2019	End Date 01/22/2019	Member's applied eligibility WL_TANF
<div> <div>RETURN TO MEMBER SEARCH</div> <div>RETURN TO DASHBOARD</div> <div>PRINT</div> </div>		

You can print the authorization request for the new line item from the Confirmation page. A printed copy of the authorization request includes authorization summary, authorization details, and details of each line item. The member in focus prints on each page.

Return to member search or to the dashboard.

Adding notes and attachments to authorization requests

Sometimes you need to add a note or an attachment to an authorization request.

If configured by the payer for the selected stay level (for IP authorization requests) or selected service type (for SP authorization requests), the text "A note is required" or "An authorization is required" (there might be a custom message) is displayed in red to the left of the Add Note button. If an attachment is also required, the text for both note and attachment is combined.

<div> <div>A Note and an Attachment are required</div> <div>ADD NOTE</div> <div>ADD ATTACHMENT (0)</div> </div>

You cannot advance to the next page if you do not add the required note or attachment.

Topics in this section

[Adding a note](#) on page 86

You can add a note on the Authorization Details page.

[Adding an attachment](#) on page 86

You can add an attachment on the Authorization Details page.

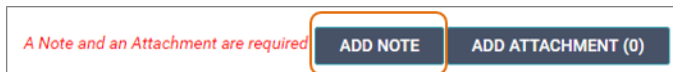
Adding a note

You can add a note on the Authorization Details page.

You might be informed that a note is required for the authorization request that you are creating. Add it on the Authorization Details page before submitting the request.

To add a note, use the following steps.

1. Select **Add Note**.



The Add Note dialog opens.

2. Enter content in the text box.
3. Select **Save**.

Adding an attachment

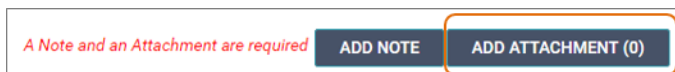
You can add an attachment on the Authorization Details page.

You might be informed that a note is required for the authorization request that you are creating. Add it on the Authorization Details page before submitting the request.

On the Add Attachment button, the count (in parenthesis) indicates the number of documents attached.

To add an attachment, use the following steps.

1. Select **Add Attachment** to add an attachment.



The Add Attachment slider opens.

Add Attachment

Attach diagnosis summary from PCP

* Document Type

Comment

* File Name

BROWSE

ADD

REMOVE

Attached Files (1)

Document Type	File	Comment
Medical Records	M1000060000_recor...	

2. Select a document type.
3. Enter a comment if needed.
4. Select **Browse** to navigate to the file location, select the file, and select **Open**.
5. Select **Add**.

The file is listed in the Attached Files section. The document type that you chose is displayed on the line item after the file is attached.

To discard the file, select the line item and select **Remove**.



Note: If the attachment cannot be uploaded, a message informs you of the problem. The attachment might not load due to a file type or size that is not supported in TruCare. Consult your administrator for assistance.

6. When you are done, select **Close**.

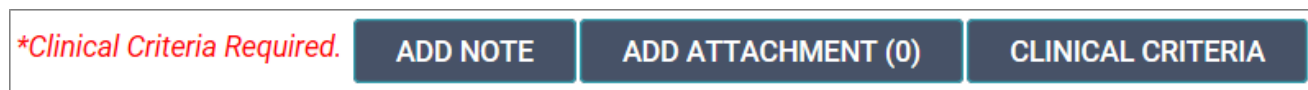
The count on the Add Attachment button is updated for the new attachment.



Adding clinical criteria to authorization requests

Sometimes you need to add clinical criteria to an authorization request.

If clinical criteria requirements are configured by your administrator, a Clinical Criteria button appears on the Authorization Details page. For standard IP and SP authorizations, when clinical criteria are required, the text "Clinical Criteria Required" appears in red to the left of the Add Note button.



The Clinical Criteria button is also available if clinical criteria are optional. The text "Clinical Criteria Optional" appears in gray. If clinical criteria are required, you cannot proceed without selecting the **Clinical Criteria**.

For IP authorizations using the comprehensive workflow, the **Clinical Criteria** button appears on the IP admission details page, next to notes and attachments and/or on the procedure details page in the prescreen summary section of the page.

Topics in this section

[Add InterQual Connect clinical criteria on page 88](#)

When configured by your administrator, the Clinical Criteria button opens the Change Healthcare InterQual Connect™ application to add clinical criteria to authorization requests.

[Add Cite AutoAuth clinical criteria on page 89](#)

When configured by your administrator, the Clinical Criteria button opens an MCG Health Cite AutoAuth window to add clinical criteria to authorization requests.

Add InterQual Connect™ clinical criteria

When configured by your administrator, the Clinical Criteria button opens the Change Healthcare InterQual Connect™ application to add clinical criteria to authorization requests.

Note: Do not use browsers in private mode (also called incognito) when using InterQual Connect™ in TruCare ProAuth. It does not work in browsers using private mode.

1. In the Authorization Details screen, select **Clinical Criteria**.

Information from the prescreen fields is passed to the InterQual® system to identify a guideline that is appropriate for those field values. The next steps depend on the results of this guideline search.

- If no guidelines are found, and a Clinical Review BRE rule is configured for it, an error message informs you that no clinical criteria guidelines were identified for the authorization request and to contact the administrator to correct the issue. You can skip the rest of these steps and continue the authorization request workflow.
- If a single guideline is identified, InterQual® opens directly to the appropriate guideline for the authorization request. You can skip the next step.
- If multiple guidelines apply, the Select Guideline for Clinical Criteria dialog opens. Complete the next step.

2. Select a guideline.

You are connected to the InterQual Connect™ application.

3. Select **Medical Review** to add clinical criteria.

The Medical Review window opens.

4. Provide required criteria.

For information about using the InterQual Connect™ application, select **Help** in the application.

While you are completing the clinical criteria, you can select **Save Review** to save the information for later. The status of the review displays near the top of the page. To complete the clinical review, select **Clinical Criteria** on the Authorization Details page.

5. Select **Complete** to complete the clinical criteria.

A warning informs you that completing the medical review will lock it from further edits. If you need to return to the review to make changes or check it, select **No**. Otherwise, continue to the next step.


6. If your review is complete, select **Yes**.

Clinical criteria are linked to the authorization in TruCare when you complete the request and submit it. After completing clinical criteria, going back to the Prescreen page and changing values might invalidate the clinical criteria. When you select **Next** on prescreen, you will see the following message: "A clinical criteria submission is either in progress or completed and will be discarded. Would you like to proceed?"

- Selecting **Yes** discards the clinical review and you may need to provide clinical criteria again as you navigate through the authorization workflow. For the IP Comprehensive workflow, you may see a clinical review message on the Review page for one or more IP procedures due to an edit made. Click the Edit form on the IP procedure to get to the IP procedure details page.
- Selecting **No** keeps the clinical criteria. You can change the field values back to their original values and continue.

Add Cite AutoAuth clinical criteria

When configured by your administrator, the Clinical Criteria button opens an MCG Health Cite AutoAuth window to add clinical criteria to authorization requests.

 **Note:** Do not use browsers in private mode (also called incognito) when using Cite AutoAuth in TruCare ProAuth. It does not work in browsers using private mode.

When providing clinical criteria, you can add one guideline.

For more information about providing Cite AutoAuth guidelines, consult your MCG Health representative.

1. In the Authorization Details screen, select **Clinical Criteria**.

The Clinical Criteria button is not enabled until you specify Requesting Provider details in the Authorization Details page.

The **Clinical Criteria** button only appears if the clinical criteria in BRE configuration is set as "Required" or "Optional." It does not appear if the clinical criteria is set to "Suppressed."

After selecting **Clinical Criteria**, the Authorization Request Review window opens and you are connected to the Cite AutoAuth application. Cite AutoAuth uses information that you added in the prescreen fields to filter the guidelines that are available for you to select.

2. Select **Document Clinical** to add guidelines.

3. Select **add** for the appropriate guideline.

If none of the displayed guidelines apply, select **No Guideline Applies**.

4. In the next window, document the guideline indications by selecting the appropriate indications (adding indication notes if needed).

While you are completing the clinical review, you can save the in-progress review. Select **Save**, and then select **Back** and return to the Authorization Details page. The status of the review displays near the top of the page. To complete the clinical review, select **Clinical Criteria** on the Authorization Details page.

5. When you are done, select **Save**.

6. Select **Submit Request** to complete the clinical criteria.

Clinical criteria are linked to the authorization in TruCare when you complete the request and submit it.

Going back to the Prescreen page and changing values, invalidates the clinical criteria. When you select **Next** on the Prescreen page, you see the following message: "You have made changes on this page. A clinical criteria submission is either in progress or completed and will be discarded. Would you like to proceed?"

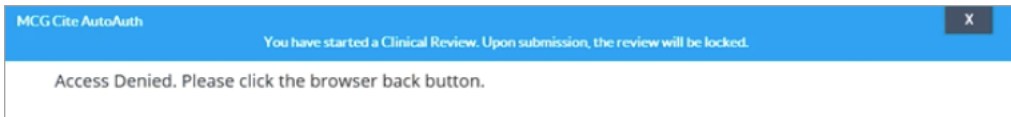
- Selecting **Yes** discards the clinical review and you may need to provide clinical criteria again as you navigate through the authorization workflow. For IP Comprehensive workflow, you may see a clinical review message on the Review page for one or more IP procedures due to an edit made. Click the Edit form on the IP procedure to get to the IP procedure details page.
- Selecting **No** keeps the clinical criteria. You can change the field values back to their original values and continue.

Changing the Requesting Provider information in the Authorization Details page invalidates the clinical criteria. If you clear the Requesting Provider Name or NPI fields, you see the following message: "You are about to make Requesting Provider changes. A clinical criteria submission is either in progress or completed and will be discarded if you continue. Would you like to proceed?"

- Selecting **Yes** discards the clinical review and you may need to provide clinical criteria again. Even if you revert the requesting provider values back to the original values after clicking Yes, you must provide clinical criteria again.
- Selecting **No** keeps the clinical criteria and the original requesting provider values remain.

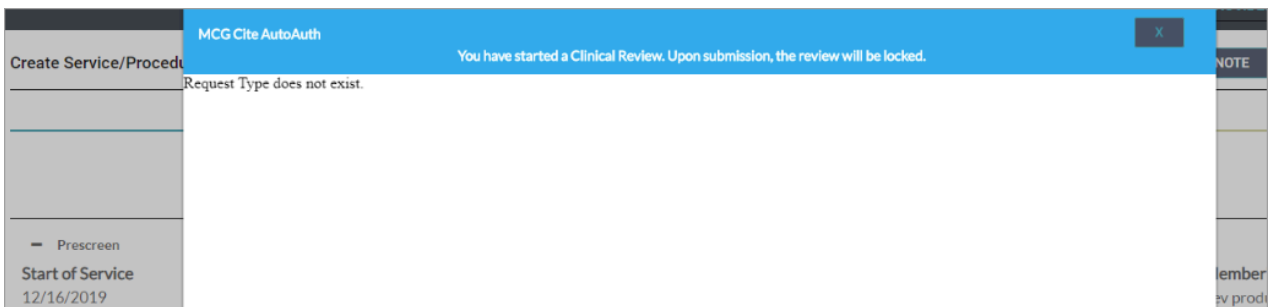
Use the following information to troubleshoot unexpected behavior or messages while adding clinical criteria.

- When saving or submitting a clinical review, a Cite AutoAuth login window appears.
Response: Close the login window and select **Clinical Criteria** again on the Authorization Details page.
- When submitting a clinical review, an Access Denied message (or similar message) appears, instructing you to click the browser back button.



Response: Ignore the message. There are no issues with access and the message should disappear quickly.

- When you select the Clinical Criteria button, if the Cite AutoAuth modal screen opens and displays a message that the request type does not exist (or something similar), there is an issue with the request type configuration.



Response: Contact your system administrator.

Viewing authorization summary tables

You can view authorizations linked to your user account in summary tables on the dashboard.

Authorization summaries are view-only. In the summary tables, you can view information on all the authorizations linked to your user account for any or all members. To view existing authorizations, you must populate the summary tables, as described in [Populating the dashboard](#) on page 15.

The following summary tables appear on the dashboard.

- Inpatient Authorization Summary
- Service/Procedure Authorization Summary
- Service Request Summary (if your organization configures this to display)

Each row of a table represents one authorization. Expand a row to view line items.

This example shows the IP and SP Summary tables expanded.

Dashboard

Member Search

Contreras, Naomi

Member ID
M1000060000

Date of Birth (Age)
07/02/1995 (23 years)

Gender
Female

Active Eligibility

Dashboard

CREATE INPATIENT AUTHORIZATION CREATE SERVICE/PROCEDURE AUTHORIZATION

+ Filter By ⓘ Include Closed: No | From Date: 07/19/2018 | Member ID: M1000060000

— Inpatient Authorizations Summary

EXTEND VIEW AUTH DETAILS

Member Name	Authorization #	Determination Stat...	From Date	To Date	Servicing Facility	Diagnosis Code	State
Contreras, Naomi	IP0000001399	Pending	11/01/2018	11/09/2018	Brooks, Douglas	707.13	Open
Contreras, Naomi	IP0000001193	Pending	10/14/2018	10/28/2018	Dallas Medical Cent...	436	Open
Contreras, Naomi	IP0000001037	Pending	08/29/2018	08/31/2018	Dallas Medical Cen...	436	Open
Contreras, Naomi	IP0000001872	Partially Approved	08/02/2018	08/05/2018	Brooks, Douglas	006.4	Open
Contreras, Naomi	IP0000001637	Pending	08/01/2018	08/02/2018	Brooks, Douglas	006.4	Open
Contreras, Naomi	IP0000000676	Pending	07/25/2018	07/31/2018	Brooks, Douglas	017.10	Open
Contreras, Naomi	IP0000000753	Pending	07/24/2018	07/29/2018	Gooding, Lisa W	014.83	Open
Contreras, Naomi	IP0000000882	Pending	07/24/2018	08/07/2018	Brooks, Douglas	014.83	Open

10

— Service / Procedure Authorizations Summary

ADD/EXTEND SERVICE VIEW AUTH DETAILS

Member Name	Authorization #	Determination Status	Start Date	End Date	State
Contreras, Naomi	OP0000001725	Approved	08/01/2018	08/01/2018	Open
Contreras, Naomi	OP0000000929	Approved	07/24/2018	07/27/2018	Open

Use case

The provider user (such as an administrative assistant) who is responsible for managing authorization requests for the provider group logs on to TruCare ProAuth to review the status of authorization requests. The user can check on all IP authorizations that have been requested by providers in the group, specifically reviewing requests by chronological order or monitoring the status of each request posted.

The user can expand the authorization on the dashboard. The line item details provide policy number, product, group number, eligibility start date, and eligibility end date at a glance.

The user can select an authorization in the table and take another action, such as view details or extend the authorization.

About Summary tables

Keep in mind the following information about viewing summary tables.

- You can display 10, 20, 50, or 100 rows of data on each page.
- Select the down arrow on the bottom of the table to set your preference for the number of records per page.
- Select the double-right or double-left arrows to move one page forward or one page back.
- Select the bar-left or bar-right arrow to jump to the first or the last page.
- Sorting is supported for every column based on data type.
- Sorting applies to overall data, not just the visible set of rows.
- Default sorting via the From Date function yields the most recent authorizations first.
- By default, only open and non-voided authorizations are displayed. When filtering authorizations, you can expand the results by selecting the **Include Closed** check box in the Filter By section.
- The default view sets the “request date” filter to seven days before the current date.

Topics in this section

[View Inpatient Authorizations Summary table on page 94](#)

The Inpatient Authorizations Summary table provides access to authorizations for which facilities or providers associated with your user account are either the servicing or requesting facility or the requesting provider.

[View Service/Procedure Authorizations Summary table on page 94](#)

The Service/Procedure Authorizations Summary table provides access to authorizations for which facilities or providers associated with your user account are either the servicing or requesting facility or the requesting provider.

[View Service Request Authorizations Summary table on page 95](#)

The Service Request Summary table provides access to service requests for which providers associated with your user account are the servicing provider. This table is available if configured by your organization.

Related procedures

Viewing authorization details on page 99

You can view more authorization details from the summary table, using **View Auth Details**.

View Inpatient Authorizations Summary table

The Inpatient Authorizations Summary table provides access to authorizations for which facilities or providers associated with your user account are either the servicing or requesting facility or the requesting provider.

You can view data for the parameters displayed in the columns of the summary table (as shown in the example in this topic). You can sort each column of data in alphabetical or numerical order. Each line (or row) of data applies to a specific member.

When you select and expand an IP authorization, one or more line items each display line item number, from date, to date, requested days, stay level, and status.

The summary table updates each time an authorization request is submitted.

In this example, the expanded authorization contains three line items.

Inpatient Authorizations Summary

EXTEND

VIEW AUTH DETAILS

	Member Name	Authorization #	Determination Stat...	From Date	To Date	Servicing Facility	Diagnosis Code	State
	Contreras, Naomi D	IP0000002947	Pending	07/22/2019	07/31/2019	Dallas Medical Center	V79.0	Open

Line Item	From Date	To Date	Requested Days	Stay Level	Procedure	Status
1	07/22/2019	07/23/2019	1	Chemical/Substan...		No Decision
2	07/23/2019	07/24/2019	1	Chemical/Substan...		No Decision
3	07/25/2019	07/31/2019	6	Nursery-Normal N...	01638 ANES ARTHROSCOPIC TOTAL SH...	No Decision

Johnson, Kathy F	IP0000002743	Pending	07/01/2019	07/08/2019	Dallas Medical Center	T486X55	Open
Johnson, Kathy F	IP0000002537	Pending	06/29/2019	07/03/2019	Brooks, Douglas	007.9	Open
Contreras, Naomi D	IP0000002637	Pending	06/28/2019	07/08/2019	Shephard, Christian	085.1	Open

1

10

View Service/Procedure Authorizations Summary table

The Service/Procedure Authorizations Summary table provides access to authorizations for which facilities or providers associated with your user account are either the servicing or requesting facility or the requesting provider.

You can view data for the parameters displayed in the columns of the summary table (as shown in the example in this topic). You can sort each column of data in alphabetical or numerical order. Each line (or row) of data applies to a specific member.

When an authorization is selected and expanded, the row expands to list authorization line items. These include line item number, from date, to date, requested units, servicing provider, procedure code and description, service type, and status.

The summary table updates each time an authorization request is submitted. This example shows the summary of an authorization submitted with one line item.

Service / Procedure Authorizations Summary

ADD/EXTEND SERVICEVIEW AUTH DETAILS

	Member Name ▾	Authorization # ▾	Determination Status ▾	Start Date ▾	End Date ▾	State ▾	
✔	Contreras, Naomi	OP0000001725	Approved	08/01/2018	08/01/2018	Open	
	Line Item	Start Date	End Date	Servicing Provider	Procedure Code and...	Service Type	Status
	1	08/01/2018	08/01/2018	Brooks, Douglas	32.20 THORACOSC...	Medical Care	Approved 1 hour
	Contreras, Naomi	OP0000000929	Approved	07/24/2018	07/27/2018	Open	
	Contreras, Naomi	OP0000000395	Approved	07/23/2018	07/24/2018	Open	

⏪ ⏩ 10

This example shows two line items have been added to the same authorization by Add/Extend Service.

Service / Procedure Authorizations Summary

ADD/EXTEND SERVICE

VIEW AUTH DETAILS

Member Name	Authorization #	Determination Status	Start Date	End Date	State
Contreras, Naomi	OP0000001725	Partially Approved	08/01/2018	08/01/2018	Open

Line Item	Start Date	End Date	Servicing Provider	Procedure Code and...	Service Type	Status
1	08/01/2018	08/01/2018	Brooks, Douglas	32.20 THORACOSC...	Medical Care	Approved 1
2	08/01/2018	08/01/2018	Brooks, Douglas	32.20 THORACOSC...	Medical Care	No Decision
3	08/01/2018	08/01/2018	Brooks, Douglas	32.20 THORACOSC...	Surgical	No Decision

Contreras, Naomi	OP0000000929	Approved	07/24/2018	07/27/2018	Open
Contreras, Naomi	OP0000000395	Approved	07/23/2018	07/24/2018	Open

1

10

View Service Request Authorizations Summary table

The Service Request Summary table provides access to service requests for which providers associated with your user account are the servicing provider. This table is available if configured by your organization.

You can view data for the parameters displayed in the columns of the summary table (as shown in the example in this topic). You can sort each column of data in alphabetical or numerical order. Each line (or row) of data applies to a specific member.

When you select and expand a service request, the row expands to list authorization line items. These include line item number, service code, modifier, service offer, start date, end date, servicing provider, quantity, and status. The summary table updates each time a service request is submitted.

If your organization requires you to acknowledge service requests, the summary table includes an Acknowledge column and you must accept and acknowledge service requests before you can view authorization details. For more information, see [Acknowledging service requests](#) on page 97.

[illegible]

Acknowledging service requests

Your organization might require you to acknowledge service requests in the Service Request Authorizations Summary table.

When you need to acknowledge a service request, the Acknowledge column in the Service Request Summary table includes an **Accept** check box.

You must acknowledge service requests in the following cases:

- There is a new service request in TruCare ProAuth.
- A previously acknowledged service request is modified in TruCare, for example a new line item is added or an already acknowledged line item is changed.

In this example, the first service request needs to be accepted and acknowledged.

Service Request Authorizations Summary									
You must acknowledge unacknowledged service requests.									
<div>ACKNOWLEDGE</div> <div>VIEW AUTH DETAILS</div>									
Acknowledge	Member Name	Authorization #	Determination Sta...	Start Date	End Date	Provider	State		
<input checked="" type="checkbox"/>	Ford, James	SR0000000632	Approved	06/28/2019	07/26/2019	Brooks, Douglas	OPEN		
Acknowledge	Line Item	Service	Modifier	Service Offer	Start Date	End Date	Quantity	Status	
	1	S5102 DAY C...	32 Mandated ...	DAY CARE SE...	06/28/2019	07/26/2019	212.67 visits	Approved visits	
Accepted		Ford, James	SR0000000431	Denied	05/17/2019	06/21/2019	Brooks, Douglas	OPEN	
Accepted		Ford, James	SR0000000507	Approved	05/26/2019	05/31/2019	Brooks, Douglas	OPEN	
Accepted		Ford, James	SR0000000370	Approved	05/08/2019	05/17/2019	Brooks, Douglas	OPEN	
Accepted		Ford, James	SR0000000267	Partial Approval	03/11/2019	03/22/2019	Brooks, Douglas	OPEN	

You cannot view a service request's details until you acknowledge it.

To acknowledge service requests in the summary table:

1. Select the **Accept** check box for the service request.

The service request expands and the service request line items are visible. The **Acknowledge** button is enabled.

If you want to acknowledge multiple service requests, select the **Accept** check box for all service requests you want to acknowledge. You can acknowledge up to 100 service requests at a time.

2. Select **Acknowledge**.

Acknowledged service requests display **Accepted** in the **Acknowledge** column. The **View Auth Details** button is enabled.

Service Request Authorizations Summary

You must acknowledge unacknowledged service requests.

ACKNOWLEDGE

VIEW AUTH DETAILS

Acknowledge ^	Member Name ⇅	Authorization # ⇅	Determination Sta... ⇅	Start Date ⇅	End Date ⇅	Provider ⇅	State ⇅
<input type="checkbox"/> Accept	Ford, James	SR0000000632	Approved	06/28/2019	07/26/2019	Brooks, Douglas	OPEN
<input checked="" type="checkbox"/> Accepted	Ford, James	SR0000000507	Approved	05/26/2019	05/31/2019	Brooks, Douglas	OPEN

Acknowledge	Line Item	Service	Modifier	Service Offer	Start Date	End Date	Quantity	Status
Accepted	1	S5102 DAY C...		DAY CARE SE...	05/26/2019	05/31/2019	408 visits	Approved visits

Accepted	Ford, James	SR0000000431	Denied	05/17/2019	06/21/2019	Brooks, Douglas	OPEN
Accepted	Ford, James	SR0000000370	Approved	05/08/2019	05/17/2019	Brooks, Douglas	OPEN
Accepted	Ford, James	SR0000000267	Partial Approval	03/11/2019	03/22/2019	Brooks, Douglas	OPEN

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Viewing authorization details

You can view more authorization details from the summary table, using **View Auth Details**.

You can access more authorization details from the dashboard summary tables.

If service request authorizations require acknowledgement, you must acknowledge them before you can view authorization details. After you acknowledge service requests, the **View Auth Details** button is enabled.

To view authorization details:

1. In the authorization summary table on the dashboard, select the authorization you want to view.
2. Select **View Auth Details**.

The IP, SP, or SR Authorization Summary page opens. You can view or print (to a PDF file) the authorization's details.

Topics in this section

[IP authorization details](#) on page 99

You can view an IP authorization's details on the Inpatient Authorization Summary page.

[SP authorization details](#) on page 102

You can view an SP authorization's details on the Service/Procedure Authorization Summary page.

[SR authorization details](#) on page 105

You can view an SR authorization's details on the Service Request Authorization Summary page.

Related concepts

[Viewing authorization summary tables](#) on page 92

You can view authorizations linked to your user account in summary tables on the dashboard.

IP authorization details

You can view an IP authorization's details on the Inpatient Authorization Summary page.

An IP authorization request summary includes three parts:

- Member ID
- Authorization Details
- Line Item Details

Member ID

Member ID includes the member identification number, member name, date of birth/age, and gender.

Authorization Details

Authorization Details shows all the data entered for the authorization request. Fields without data indicate that the entry was optional and the user chose not to exercise the option.

Inpatient Authorization Summary				PRINT	BACK TO DASHBOARD						
Member ID M1000060000	Name Contreras, Naomi D	Date of Birth (Age) 07/02/1995 (22 years)	Gender Female								
Authorization Details											
Authorization Number IP0000013304	Admission Type Emergency	Level Of Urgency	Request Source Authorized Representative								
Admission Date 09/16/2017	Discharge Date	Total Days 14 Approved/ 0 Denied/ 2 Pending	Discharge Disposition								
State Open	Primary Diagnosis Code 005.1	Primary Diagnosis Description BOTULISM FOOD POISONING									
Requesting Provider Name Brooks, Douglas	Requesting Provider NPI 1234567893	Requesting Provider Phone Number (555) 555-5555	Requesting Provider Fax Number (555) 555-5556								
Servicing Facility Name Saint Vincent Medical Center	Servicing Facility NPI 1234567893	Servicing Facility Phone Number	Servicing Facility Fax Number								
Servicing Facility Out Of Network Reason Facility Not Available											
Line Item Details											
Line Item	From Date	To Date	Requested Days	Status	Determined Days	Applied Eligibility	Stay Level	Service Type	Place Of Service	Level Of Urgency	Type
1	09/16/2017	09/30/2017	14	Approved	14	TX_TANF	Medical		Inpatient Hospital		Emergency
2	09/30/2017	10/02/2017	2	Pending		TX_TANF	Observation		Inpatient Hospital		Urgent

If there are User Defined Fields (UDFs) in the Authorization Details, they will appear in their associated sections, as shown in the following example.

Inpatient Authorization Summary				PRINT	BACK TO DASHBOARD
Member ID M1000060000	Name Contreras, Naomi D	Date of Birth (Age) 07/02/1995 (23 years)	Gender Female		
Authorization Details					
Authorization Number IP0000001216	Admission Type Trauma	Level Of Urgency	Request Source Authorized Representative		
Admission Date 07/16/2018	Discharge Date	Total Days 0 Approved/ 0 Denied/ 5 Pending	Discharge Disposition		
State Open	Primary Diagnosis Code 733.13	Primary Diagnosis Description PATHOLOGIC FRACTURE OF VERTEBRAE			
Additional Auth Info Auth xyz					
Requesting Provider Name Brooks, Douglas	Requesting Provider NPI 1234567893	Requesting Provider Phone Number (222) 232-3000	Requesting Provider Fax Number (222) 232-3002		
Provider Priority Number 2					

Line Item Details

Line Item Details includes a breakdown of items in the original request and extensions, such as date range, requested days, determination status, and stay level. The number of requested days and determined days are listed before and after the status. In the first example in this topic, Line item 1 includes Requested Days – 14; Status – Approved; Determined Days – 14. Any UDFs are included.

If the line items include UDFs, the UDFs are listed in columns on the right side of the line items, as in the following example, in which Additional Detail is a UDF.

Level Of Urgency	Type	Primary Px Code	Additional Detail
Urgent	Emergency		v3
Urgent	Emergency		v1
Urgent	Emergency		v1

The page includes line item determination reasons if the TruCare ProAuth administrator configures their display. Expand a line item to see the reason. Administrators can display reasons for all determination types or limit the display to specific determination types. For example, the reason for Denied determinations might appear, but not for Partially Approved determinations, as in this example for Line Item 2.

Line Item Details										
	Line Item	From Date	To Date	Requested Days	Status	Determined Days	Applied Eligibility	Stay Level	Service Type	Place Of S
➤	1	06/13/2018	06/15/2018	2	Approved	2	WI_TANF	Rehab	Orthodontics	Homeless
▼	2	02/20/2019	02/21/2019	1	Denied	1	WI_TANF	Medical	Medical Care	Outpatient
Decision Date/Time 02/20/2019 02:34 PM Reason Denied by Medical Services										
➤	3	02/22/2019	02/25/2019	3	Partially Approved	3	WI_TANF	Medical		Offic
		02/22/2019	02/23/2019	3	Approved	1	WI_TANF	Medical		Offic
		02/23/2019	02/24/2019	3	Denied	1	WI_TANF	Medical		Offic
		02/24/2019	02/25/2019	3	Pending	1	WI_TANF	Medical		Offic
	4	02/25/2019	02/26/2019	1	No Decision		WI_TANF	Medical		Inpatient H

SP authorization details

You can view an SP authorization's details on the Service/Procedure Authorization Summary page.

An SP authorization request summary includes three parts:

- Member ID
- Authorization Details
- Line Item Details

Member ID

Member ID includes the member identification number, member name, date of birth/age, and gender.

Authorization Details

Authorization Details show all the data entered for the authorization request, as shown in the following example.

Service / Procedure Authorization Summary				PRINT	BACK TO DASHBOARD					
Member ID M1000050000	Name Bob, Gregory V	Date of Birth (Age) 05/02/1954 (63 years)	Gender Male							
Authorization Details										
Authorization Number OP0000016598	State Open	State Date 06/05/2017								
Primary Diagnosis Code 706.0	Primary Diagnosis Description ACNE VARIOLIFORMIS	Request Source Authorized Representative								
Requesting Provider Name Shephard, Christian	Requesting Provider NPI 1234567893	Requesting Provider Phone Number (555) 555-5555	Requesting Provider Fax Number (555) 555-5556							
Line Item Details										
▼ Service Type: Hospital - Outpatient Procedure Code: 4120F Procedure Name: ANTIBIOTIC PRESCRIBED OR DISPENSED										
Line Item	Start Date	End Date	Requested Units	Status	Determined Units	Applied Eligibility	Servicing Provider name	Servicing Provider NPI	Place Of Service	Level Of Urg
2	06/04/2017	06/08/2017	3 Units	Pending	0 Units	WI_SNIP	LAC+USC Medical Center	1234567893	Mobile Unit	Non-Urgent
▼ Service Type: Hospital - Outpatient Procedure Code: 99.21 Procedure Name: INJECTION OF ANTIBIOTIC										
Line Item	Start Date	End Date	Requested Units	Status	Determined Units	Applied Eligibility	Servicing Provider name	Servicing Provider NPI	Place Of Service	Level Of Urg
1	06/04/2017	06/04/2017	1 Visits	Pending	0 Visits	WI_SNIP	LAC+USC Medical Center	1234567893	Office	Non-Urgent

Authorization details are updated immediately when an authorization request is modified. Continuing from the preceding example, the line item details now show that Service 2 was modified with an extension. The extended service differs from the original service by requested units and place of service.

Service / Procedure Authorization Summary										PRINT	BACK TO DASHBOARD
Member ID M1000050000	Name Bob, Gregory V		Date of Birth (Age) 05/02/1954 (63 years)		Gender Male						
Authorization Details											
Authorization Number OP0000016598	State Open		State Date 06/05/2017								
Primary Diagnosis Code 706.0	Primary Diagnosis Description ACNE VARIOLIFORMIS		Request Source Authorized Representative								
Requesting Provider Name Shephard, Christian	Requesting Provider NPI 1234567893		Requesting Provider Phone Number (555) 555-5555			Requesting Provider Fax Number (555) 555-5556					
Line Item Details											
▼ Service Type: Hospital - Outpatient Procedure Code: 4120F Procedure Name: ANTIBIOTIC PRESCRIBED OR DISPENSED											
Line Item	Start Date	End Date	Requested Units	Status	Determined Units	Applied Eligibility	Servicing Provider name	Servicing Provider NPI	Place Of Service	Level Of Urgency	
2	06/04/2017	06/08/2017	3 Units	Pending	0 Units	WI_SNIP	LAC+USC Medical Center	1234567893	Mobile Unit	Non-Urgent	
3	06/04/2017	06/04/2017	1 Units	Pending	0 Units	WI_SNIP	LAC+USC Medical Center	1234567893	Nursing Facility	Non-Urgent	
▼ Service Type: Hospital - Outpatient Procedure Code: 99.21 Procedure Name: INJECTION OF ANTIBIOTIC											
Line Item	Start Date	End Date	Requested Units	Status	Determined Units	Applied Eligibility	Servicing Provider name	Servicing Provider NPI	Place Of Service	Level Of Urgency	
1	06/04/2017	06/04/2017	1 Visits	Pending	0 Visits	WI_SNIP	LAC+USC Medical Center	1234567893	Office	Non-Urgent	

If there are User Defined Fields (UDFs), they will appear in their associated sections. The following example shows a UDF in the SP Authorization Details area.

Service / Procedure Authorization Summary										PRINT	BACK TO DASHBOARD
Member ID M1000060000	Name Contreras, Naomi D		Date of Birth (Age) 07/02/1995 (23 years)		Gender Female						
Authorization Details											
Authorization Number OP0000001547	State Open		State Date 07/09/2018								
Primary Diagnosis Code 370.00	Primary Diagnosis Description UNSPECIFIED CORNEAL ULCER		Request Source Authorized Representative								
Requesting Provider Name Brooks, Douglas	Requesting Provider NPI 1234567893		Requesting Provider Phone Number (212) 222-2323			Requesting Provider Fax Number (212) 222-2325					
Additional Auth Info rp 1											

Line Item Details

Line Item Details includes a breakdown of items in the original request, extensions, and added services. These are shown in the first example in this topic.

If the line items include UDFs, the UDFs are listed in columns on the right side of the line items, as in the following example, in which Additional Detail is a UDF.

Level Of Urgency	Type	Primary Px Code	Additional Detail
Urgent	Emergency		v3
Urgent	Emergency		v1
Urgent	Emergency		v1

The page includes line item determination reasons if the TruCare ProAuth administrator configures their display. Expand a line item to see the reason. Administrators can display reasons for all determination types or limit the display to specific determination types. For example, the reason for Partially Denied determinations might appear, but not for Approved determinations, as in this example for Line Item 8.

Line Item Details									
▶	Service Type: Anesthesia	Procedure Code: 00.70		Procedure Name: REV HIP REPLACEMENT BOTH ACETAB & FEMORAL CMPNTS					
▶	Service Type: Consultation	Procedure Code: 00300		Procedure Name: ANES INTEG MUSC & NRV HEAD NECK&POSTERIOR TRUNK					
▶	Service Type: Diagnostic Lab	Procedure Code: 00.50		Procedure Name: IMPL CARD RESYNCHRNIZAT PACEMKR W/O DFIB TOT SYS					
▶	Service Type: Diagnostic X-Ray	Procedure Code: 00.40		Procedure Name: PROCEDURE ON SINGLE VESSEL					
▶	Service Type: Durable Medical Equipment Rental	Procedure Code: 1190		Procedure Name: ANESTHESIA OBTURATOR NEURECTOMY INTRAPELVIC					
▶	Service Type: Medical Care	Procedure Code: 00.28		Procedure Name: INTRAVASCULAR IMAGING OTHER SPECIFIED VESSEL(S)					
▶	Service Type: Radiation Therapy	Procedure Code: 00600		Procedure Name: ANESTHESIA CERVICAL SPINE & CORD NOS					
▶	Service Type: Surgical	Procedure Code: 0200T		Procedure Name: PERQ SACRAL AUGMENT UNI +-BALLOON/DEVICE 1+NDL					
▼	Service Type: Surgical Assistance	Procedure Code: 00.80		Procedure Name: REVISION KNEE REPLACEMENT TOTAL ALL COMPONENTS					
	Line Item	Start Date	End Date	Requested Units	Status	Determined Units	Applied Eligibility	Servicing Provider Name	Servicing Provider NPI
▼	8	02/06/2017	02/11/2017	5 Visits	Partially Denied	5 Visits	WI_TANF	Brooks, Douglas	1234567893
		02/06/2017	02/11/2017	5 Visits	Denied	3 Visits	WI_TANF	Brooks, Douglas	1234567893
		02/06/2017	02/11/2017	5 Visits	Pending	2 Visits	WI_TANF	Brooks, Douglas	1234567893
Decision Date/Time 01/09/2019 06:42 PM Reason Authorization/Access Restrictions									

SR authorization details

You can view an SR authorization's details on the Service Request Authorization Summary page.

An SR authorization request summary includes the following parts:

- Member ID
- Authorization Details
- Line Item Details

Service Request Authorization Summary

PRINT

BACK TO DASHBOARD

Member ID	Name	Date of Birth (Age)	Gender
M1000530000	Ford, James	07/20/1969 (49 years)	Male

Authorization Details

Authorization Number	State	Status	
SR0000000507	OPEN	Approved	
Start Date	End Date	Close Date	
05/26/2019	05/31/2019		
Service Provider	Service Provider NPI	Service Provider Address	Service Provider Specialty
Brooks, Douglas	1234567893	Coral Gables Hospital, 3100 S Douglas Rd., Coral Gables, FL, 33134	General Practice

Line Item Details

Line Item	Service	Modifier Code	Service Offer	Service Location	Start Date	End Date	Quantity	Status	Applied Eligibility
1	S5102 DAY CARE SERVICES, ADULT, PER DIEM		DAY CARE SERVICES, ADULT, PER DIEM		05/26/2019	05/31/2019	34 VISITS, 2 TIMES, EVERY 1 DAYS, IS A TOTAL OF 408 VISITS	Approved	FL_TC

Member ID

Member ID includes the member identification number, member name, date of birth/age, and gender.

Authorization Details

Authorization Details show all the data entered for the authorization request, such as the request's start date (earliest start date), end date (latest end date), and closed date, and the service provider's name, NPI, specialties, and address. Fields without data indicate that the entry was optional and the user chose not to exercise the option.

Line Item Details

Line Item Details includes line item number, service code/description, modifier code, service offer, service location, quantity, start date, end date, determination status, and applied eligibility. Rate information is included if configured by your organization.

Viewing correspondence

You can view correspondence relating to UM authorizations from the IP or SP summary dashboard, using **View Correspondence**.

To view correspondence:

1. In the authorization summary table on the dashboard, select the authorization for which you wish to view correspondence.
2. Select **View Correspondence**.

The Correspondence Summary page for the selected authorization opens. You can view the letter history for any letter in Complete status.

Topics in this section

[Correspondence summary](#) on page 107

The Correspondence Summary appears when you select an authorization on the member dashboard and select **View Correspondence**. On the summary you can select correspondence to view details about or return to the member dashboard by selecting **Back to Dashboard**.

[View letter history](#) on page 109

Letter history provides additional information on a letter. It also allows you to view a PDF of the letter, from which you can download or print the letter.

Correspondence summary

The Correspondence Summary appears when you select an authorization on the member dashboard and select **View Correspondence**. On the summary you can select correspondence to view details about or return to the member dashboard by selecting **Back to Dashboard**.

Correspondence Summary

Authorization Number
IP0001004553

BACK TO DASHBOARD

Correspondence Page Instructions

Correspondence is available once completed by 'health plan'. When printing correspondence kindly remember to print applicable pages as there may be multiple copies of the letter with different recipients. If you have questions on Correspondence contact 1-800-555-1200.

Letter Name	Status	Date Generated
SP AuthApproval	Complete	12/01/2022 1:41 PM

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Functional areas of the Correspondence Summary

This table describes the functional areas of the Correspondence Summary.

Function	Description
Authorization Number	Shows the number identifying the authorization for which correspondence is being displayed.
Back to Dashboard	Returns you to the member dashboard.
Correspondence Page Instructions	<p>This field provides any specific instructions for your payer organization.</p> <p>The instructions for your payer organization were entered in Global Configuration > Miscellaneous > Correspondence > Correspondence Page Instructions.</p>

Function	Description
Letters	<p>Correspondence Summary is updated in real-time when a payer initiates the letter to any of the recipients. This column lists letters concerning the authorization that have been initiated to designated recipients. To select a letter click on it. The line turns blue and a chevron appears on the first column of the list. Clicking on the chevron displays the letter history.</p> <p>Summary information columns for correspondence are:</p> <ul style="list-style-type: none"> • Letter Name - a name indicating the content of the letter. • Status - Complete, indicating that the letter has been generated by TruCare, or Voided, indicating that the letter has been voided. You cannot view or print a void letter. If the letter status is Void, the void reason displays next to the status. • Date Generated - The date and time stamp from when the letter was generated. <p>By default, letters are sorted using most recent to earliest date generated information, but you can adjust the sort on any or the columns using the arrows in any of the columns. Sorting applies to overall data and not just to the visible set of rows.</p>
Page and Items per page	<p>A display indicating page being viewed (highlighted in black) and the number of items that can display on a page (in the drop-down box). To increase the number of items displayed in the summary grid, select the down-arrow in the drop-down box and then select 10, 20, 50, or 100.</p>

View letter history

Letter history provides additional information on a letter. It also allows you to view a PDF of the letter, from which you can download or print the letter.

To view letter history from the Correspondence Summary:

1. Select the letter in the Correspondence Summary grid by clicking on the corresponding line. The line turns blue and a chevron appears in the first column.
2. Select the chevron. The Letter History appears within the Correspondence Summary.

Topics in this section

[Viewing Letter History](#) on page 110

The Letter History shows the status of a letter and the date and time the letter was generated. Using the Letter History grid, you can open a PDF of the letter and, from the PDF, print or download the letter.

[Open PDF](#) on page 110

From the Letter History grid, you can open a letter in PDF if its status is Complete. The PDF opens in a separate tab on your browser or in a PDF viewer, depending on your configuration. From that PDF, you can download, share, or print the letter. Each browser or PDF viewer differs in exactly how you download or print a file.

Viewing Letter History

The Letter History shows the status of a letter and the date and time the letter was generated. Using the Letter History grid, you can open a PDF of the letter and, from the PDF, print or download the letter.

The Letter History grid contains two columns:

- **Status** - The current state of the letter. SUCCESS indicates the letter was successfully printed. or faxed from TruCare. It does not indicate that the letter recipient received the correspondence.
- **Date Generated** - The date and time stamp indicating when the letter was printed or faxed.

The grid also contains the **Open PDF** button, which allows you to view the PDF of a letter.

Open PDF

From the Letter History grid, you can open a letter in PDF if its status is Complete. The PDF opens in a separate tab on your browser or in a PDF viewer, depending on your configuration. From that PDF, you can download, share, or print the letter. Each browser or PDF viewer differs in exactly how you download or print a file.

To view a PDF of a letter from the Letter History grid, select the letter and then click **Open PDF**. The letter opens in a separate tab on the browser or in a PDF viewer.

Applying a filter to your provider list

Using filtering is one of the best ways to make your work activities more efficient.

Filtering allows you to create a subset of just the entities you need to see at one time. For example, you can use filtering to narrow your provider list for a work session.

Note: Any filters that you create last only for as long as you maintain your work session. Filters cannot be saved.

Requesting provider

The requesting provider is the entity that is requesting/ordering the service or admission for a member.

For authorization requests created and submitted, only the providers associated with your user account qualify as requesting providers, unless your configuration allows you to search for all available providers. If you have that option and you select **Search All Providers**, all available providers are returned by the search. Any providers returned by your provider search can be entered into the Requesting Provider field.

Note: When authorization requests are created, searches for requesting providers use all providers associated with your account (or all providers if your configuration allows you to search for all available providers and you select that option), not solely the providers selected on the Provider Filter at a given time.

Default provider list

By default, none of the providers associated with your user account are selected at the start of a work session. You can select all by selecting the **Provider List** check box or filter the list by creating a subset of providers to use for a specific purpose.

Note: The Provider List check box is only available if the number of providers associated with your account is less than or equal to the provider threshold configured by the TruCare ProAuth administrator. See [About selecting providers in the Provider Filter](#) on page 113 for more information.

To restore the default provider list, clear the **Provider List** check box. The indicator changes from green to gray, as no entries are active. All providers linked to your account are displayed. Select the **Provider List** check box then select **Apply Filter** to make all entries active again.

Topics in this section

[Provider Filter indicators](#) on page 112

Provider Filter indicators show whether the filter is applied and information about your providers.

[About selecting providers in the Provider Filter](#) on page 113

In the Provider Filter, the maximum number of providers (provider threshold) that you can select is configured by the TruCare ProAuth administrator.

[Applying a filter](#) on page 114

Apply a filter to your provider list to create a list of providers that you need for your current work session.

[Adding to a filter](#) on page 117

After you activate a filter, you can add other providers to it.

[Removing the filter](#) on page 118

You can clear the provider filter, so that no providers are selected.

Provider Filter indicators

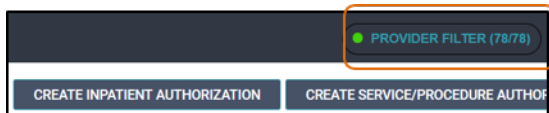
Provider Filter indicators show whether the filter is applied and information about your providers.

When you start TruCare ProAuth none of the providers linked to your user account are active.

The indicator on the Provider Filter button is gray, meaning no providers have been selected.



After you have selected providers, the indicator turns to green.



The numbers to the right of the Provider Filter button indicate the number of applied providers to the left of the diagonal line (/) and the number of providers associated with your account on the right. In the first example, 0/78 means that no providers are applied to the filter and 78 providers are associated with the user's account. In the second example, all 78 providers are applied to the filter.

About selecting providers in the Provider Filter

In the Provider Filter, the maximum number of providers (provider threshold) that you can select is configured by the TruCare ProAuth administrator.

The display of the Provider List check box in the Provider Filter depends on the number of providers associated with your account and the configured provider threshold.

- If the number of providers associated with your account is less than or equal to the configured provider threshold, the Provider List check box is available in the Provider Filter. You can use that check box to select all providers. When using the Advanced Search, the results are automatically selected.
- If the number of providers associated with your account exceeds the configured provider threshold, the Provider List check box is not available in the Provider Filter.

You cannot manually select more providers than the configured provider threshold. If your selections reach the provider threshold, the remaining provider check boxes are disabled. A message informs you that the limit has been reached and to select other providers you must deselect some providers (as shown in the next example).

The screenshot shows the Provider Filter interface. At the top, there is a search bar with a magnifying glass icon and the text "Search by NPI". Below the search bar, a message states: "You have reached the maximum number of selected providers. To select other providers, clear some of the current selections." Below this message, there are four provider entries, each with a checked checkbox and the name "Brooks, Douglas". The first three entries have a "Location Name" field, while the fourth does not. Each entry has a "Provider ID" field with the value "100123", a "Tax ID" field with the value "99-1234567", and an "NPI" field with the value "1234567893". The "Specialty" field for all entries is "General Practice". The "Servicing address" field for the first three entries is "Coral Gables Hospital, 3100 S Douglas Rd, Coral Gables, FL, 33134, USA". The "Servicing address" field for the fourth entry is "Miami Urgent Care, 2645 S Douglas Rd, Miami, FL, 33133, USA". At the bottom of the interface, there is a pagination bar with the text "Provider ID", "Tax ID", and "NPI" followed by a series of navigation icons and a dropdown menu showing the number "100". Below the pagination bar, there are two buttons: "APPLY FILTER" and "RESET".

If the number of providers returned in advanced search results is less than or equal to the configured provider threshold, the results are automatically selected.

If the number of providers returned in advanced search results exceeds the configured provider threshold, the first x (where x is the provider threshold) number of providers are automatically selected. A message informs you that the limit has been reached and to select other providers, you must deselect some providers (as shown in the next example).

Go Back to Provider Filter

The search results exceed the maximum number of selected providers. Providers over that limit are not selected. To select other providers, refine your search.

☒ Brooks, Douglas
Location Name: Coral Gables Hospital

Provider ID 100123	Tax ID 99-1234567	NPI 1234567893
Specialty General Practice	Servicing address Coral Gables Hospital 3100 S Douglas Rd, Coral Gables, FL, 33134, USA	

☒ Brooks, Douglas
Location Name: Miami Urgent Care

Provider ID 100123	Tax ID 99-1234567	NPI 1234567893
Specialty General Practice	Servicing address Miami Urgent Care 2645 S Douglas Rd Miami, FL, 33133, USA	

☒ Brooks, Douglas
Location Name: Coral Gables Hospital

Provider ID 100123	Tax ID 99-1234567	NPI 1234567893
Specialty General Practice	Servicing address	

☒ Brooks, Douglas
Location Name: Coral Gables Hospital

Provider ID 100123	Tax ID 99-1234567	NPI 1234567893
Specialty General Practice	Servicing address	

☒ Brooks, Douglas
Location Name: Coral Gables Hospital

Provider ID
Tax ID
NPI

100

ADD TO FILTER
BACK TO SEARCH

Applying a filter

Apply a filter to your provider list to create a list of providers that you need for your current work session.

Any filters that you create last only for as long as you maintain your work session. Filters cannot be saved.

When working in the filter, keep the following in mind:

- Use the bottom controls to page through the list and to set the number of entries per page.

Provider List + Advanced Search Search by NPI

☒ Brooks, Douglas
Location Name: Coral Gables Hospital

Provider ID 100123	Tax ID 99-1234567	NPI 1234567893
Specialty General Practice	Servicing address Coral Gables Hospital 3100 S Douglas Rd. Coral Gables, FL 33134	

1 100

APPLY FILTER RESET

- To close the filter slider, select the Provider Filter button or click anywhere else on the page. Ensure that your selections are active before closing it.

To apply a filter to your provider list, use the following steps.

- Select **Provider Filter** in the upper right area of the dashboard to open the filter slider.

When the filter slider opens, by default, none of the providers associated with your user account are selected. The indicator is gray.

TruCare ProAuth PROVIDER FILTER (0/78) Portal Writer Help About

Dashboard

Member Search

Filter By ?

Member ID [] Authoriza []

Date of Service From Date 07/17/2018 Date of Se []

MM/DD/YYYY

☐ Include Closed ☐ Request

FILTER RESET

Inpatient Authorizations Summary

Member Name	Authorization #	Deter
-------------	-----------------	-------

Service / Procedure Authorizations Summary

Member Name	Authorization #
-------------	-----------------

Provider List + Advanced Search Search by NPI

☐ Brooks, Douglas
Location Name: Coral Gables Hospital

Provider ID 100123	Tax ID 99-1234567	NPI 1234567893
Specialty General Practice	Servicing address Coral Gables Hospital 3100 S Douglas Rd. Coral Gables, FL 33134, USA	

☐ Brooks, Douglas
Location Name: Miami Urgent Care

Provider ID 100123	Tax ID 99-1234567	NPI 1234567893
Specialty General Practice	Servicing address Miami Urgent Care 2645 S Douglas Rd. Miami, FL 33133, USA	

☐ Brooks, Douglas
Location Name: Coral Gables Hospital

Provider ID 100123	Tax ID 99-1234567	NPI 1234567893
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1 100

APPLY FILTER RESET

2. In the filter slider, select the providers you want active in your filter using one of the following methods.

- Select all providers.
 - a. Select the **Provider List** check box in the upper left of the slider.

Note: The Provider List check box is available if the number of providers associated with your account is less than or equal to the configured provider threshold. For information about the provider threshold and provider selections, see [About selecting providers in the Provider Filter](#) on page 113.

- b. When you are done, select **Apply Filter** to add the providers to the filter and close the slider.
- Select providers individually.
 - a. If you have a short list of providers, scroll through the list and check any provider you want to add to the filter.
 - b. When you are done, select **Apply Filter** to add the providers to the filter and close the slider.
- Search by NPI.
 - a. Type the 10-digit ID number of the provider in the Search box. (You must enter at least two characters.)

One or more matching provider entries are displayed. For example, a provider may work at multiple facilities.

Providers are already selected if results do not exceed the provider threshold, as described in [About selecting providers in the Provider Filter](#) on page 113). If the threshold is exceeded, follow the instructions to select providers.
 - b. If necessary, deselect entries you do not want.
 - c. Select **Add to Filter** to add the selected provider(s) to the filter and close the slider.
- Advanced Search.
 - a. Select **Advanced Search** then fill in one or more of the fields. (You must enter at least two characters for the provider name, provider ID, or city. Select the state from the drop-down list.) When you are done, select **Search**.

One or more matching provider entries are displayed. For example, a provider may work at multiple facilities.

Providers are already selected if results do not exceed the provider threshold, as described in [About selecting providers in the Provider Filter](#) on page 113). If the threshold is exceeded, follow the instructions to select providers.
 - b. If necessary, deselect entries you do not want.
 - c. Select **Add to Filter** to add the selected provider(s) to the filter and close the slider.

The Provider Filter status indicator turns to green. The count on the Provider Filter button indicates the number of providers you applied to the filter.

Adding to a filter

After you activate a filter, you can add other providers to it.

If you need to add another provider to your filter after creating it, you can easily do so.

To add a provider to your filter:

1. Select **Provider Filter** in the upper right area of the dashboard to open the filter slider.
To close the filter slider at any time during this process, select Provider Filter or click anywhere else on the page. Ensure that your new selections are active before closing it.
2. In the filter slider, select the providers you want active in your filter using one of the following methods.
 - Search by NPI.
 - a. Type the 10-digit ID number of the provider in the Search box. (You must enter at least two characters.)
One or more matching provider entries are displayed. For example, a provider may work at multiple facilities.

Providers are already selected if results do not exceed the provider threshold, as described in [About selecting providers in the Provider Filter](#) on page 113). If the threshold is exceeded, follow the instructions to select providers.
 - b. If necessary, deselect entries you do not want.
 - c. Select **Apply Filter**.
 - Advanced Search.
 - a. Select **Advanced Search** then fill in one or more of the fields. (You must enter at least two characters for the provider name, provider ID, or city. Select the state from the drop-down list.) When you are done, select **Search**.
One or more matching provider entries are displayed. For example, a provider may work at multiple facilities.

Providers are already selected if results do not exceed the provider threshold, as described in [About selecting providers in the Provider Filter](#) on page 113). If the threshold is exceeded, follow the instructions to select providers.
 - b. If necessary, deselect entries you do not want.
 - c. Select **Add to Filter** to add the selected provider to the filter and close the slider.

The count on the Provider Filter button increases by the number of providers you add to the filter.

Removing the filter

You can clear the provider filter, so that no providers are selected.

You can return to the default provider state, in which no providers are selected.

To remove the provider filter, use one of the following options:

- Clear (uncheck) the **Provider List** check box.

Note: The Provider List check box is available if the number of providers associated with your account is less than or equal to the configured provider threshold. For information about the provider threshold and provider selections, see [About selecting providers in the Provider Filter](#) on page 113.

- Select **Reset**.

The Provider Filter status indicator turns to gray. The selected provider count on the Provider Filter button returns to zero (0).

UDF guidelines

Use these guidelines when working with User Defined Fields (UDFs) in authorizations.

When you are creating an authorization request, it might include UDFs. The names and locations of UDFs vary based on your administrator's UDF configurations.

UDFs that require a value are marked with an asterisk. You must provide a value to continue creating the authorization (move to the next screen or submit an authorization).

The following example, shows an IP authorization with a required UDF.

The screenshot displays the 'Create Inpatient Authorization' form. At the top, there are two buttons: 'ADD NOTE' and 'ADD ATTACHMENT'. Below these is a progress bar with three steps: 'Prescreen', 'Authorization Details', and 'Authorization Confirmation'. The 'Authorization Details' step is currently active. The form contains several required fields marked with an asterisk (*):

- * Requesting Provider: Two input fields with a 'SEARCH' button. Below the first field is the text 'Search by Provider name' and below the second is '(OR) Search by Provider NPI'.
- * Requesting Provider Contact Name: A single input field.
- * Requesting Provider Contact Number: An input field with a dropdown menu showing '1' and a placeholder '(999) 999-9999'.
- * Requesting Provider Fax Number: An input field with a dropdown menu showing '1' and a placeholder '(999) 999-9999'.
- * Provider Priority Number: An input field, which is highlighted with an orange border.

Topics in this section

[UDF types](#) on page 120

There are four User Defined Fields (UDFs) types in TruCare authorizations that may be available in TruCare ProAuth.

UDF types

There are four User Defined Fields (UDFs) types in TruCare authorizations that may be available in TruCare ProAuth.

- **Date:** Displays a text field and calendar. In the text field, only numbers and forward slashes (/) are allowed.
- **Numeric:** Display a field in which users can enter whole numbers. Negative numbers and decimals are not allowed.
- **String:** Displays a text field. Special characters are allowed.
- **Drop-down:** Displays a drop-down menu with values.



Expired diagnosis or procedure codes

TruCare ProAuth applies the TruCare Code Expiration Date Settings that were configured by the TruCare administrator.

When you create or extend authorizations, TruCare ProAuth applies the TruCare Code Expiration Date Settings to the specified diagnosis and procedure codes.

Expired codes in IP and SP authorizations

This section describes the circumstances in which a diagnosis or procedure code is expired.

In an IP authorization:

- A code is expired if its termination date is before (<) the authorization's Admission Date or its effective date is after (>) the authorization's Admission Date.
- A code is valid if its effective date is equal to or before (=<) the authorization's Admission Date and there is no code termination date or the termination date is equal to or after (=>) the authorization's Admission Date.

In an SP authorization:

- A code is expired if its termination date is before (<) the authorization's Start Date or its effective date is after (>) the authorization's Start Date.
- A code is valid if its effective date is equal to or before (=<) the authorization's Start Date and there is no code termination date or the termination date is equal to or after (=>) the authorization's Start Date.

Topics in this section

[How TruCare ProAuth treats expired codes](#) on page 121

How TruCare ProAuth treats expired codes

When an authorization includes an expired diagnosis or procedure, TruCare Code Expiration Date Settings control the behavior in authorizations.

There are three TruCare Code Expiration Date Settings:

- **Do not check dates**
- **Warn when dates are invalid**
- **Disallow invalid dates**

The following sections describe how TruCare ProAuth handles expired diagnoses or procedures based on these TruCare settings.

Topics in this section

[Do not check dates setting](#) on page 122

When the TruCare Code Expiration Date Setting is **Do not check dates**, TruCare ProAuth handles expired diagnoses or procedures as described in this section.

[Warn when dates are invalid setting](#) on page 122

When the TruCare Code Expiration Date Setting is **Warn when dates are invalid**, TruCare ProAuth handles expired diagnoses or procedures as described in this section.

[Disallow invalid dates setting](#) on page 125

When the TruCare Code Expiration Date Setting is **Disallow invalid dates**, TruCare ProAuth handles expired diagnoses or procedures as described in this section.

Do not check dates setting

When the TruCare Code Expiration Date Setting is **Do not check dates**, TruCare ProAuth handles expired diagnoses or procedures as described in this section.

In TruCare ProAuth, procedure and diagnosis codes are not checked for expiration dates. You can submit authorizations that have an expired procedure or diagnosis.

Warn when dates are invalid setting

When the TruCare Code Expiration Date Setting is **Warn when dates are invalid**, TruCare ProAuth handles expired diagnoses or procedures as described in this section.

In TruCare ProAuth, when you are creating or extending an authorization, you are informed when procedures or diagnoses are expired, but you can still create or extend the authorization. TruCare ProAuth informs you of expired codes in several ways.

If an authorization includes an expired diagnosis or procedure, it is highlighted in red and a message informs you that the code is not valid for the selected date.

In the following example, the procedure and diagnosis codes are expired.

TruCare ProAuth PROVIDER FILTER (0/80) TCAAdmin TCAd

Dashboard

Member Search

IP Configuration

SP Configuration

Global Configuration

Hume, Desmond

Member ID
M1000600000

Date of Birth (Age)
04/17/1967 (51 years)

Gender
Male

Active Eligibility
Yes

Policy #
POL000160

Product
FL_CM

Group #

Prescreen Authorization Details Authorization Confirmation

* Admission Date
07/27/2018 MM/DD/YYYY

* Member's Applied Eligibility
FL_CM

* Servicing Facility
dev facility al (OR) Search by Provider NPI CLEAR

⚠ Servicing Facility selected is out of network.

* Primary Diagnosis
RETICULOSARCOMA UNSPEC SITE XTRANOD&SOLID O 200.00 ICD9 CLEAR
The code is not valid for the selected date.

Primary Procedure
FINE NEEDLE ASPIRATION W/O IMAGING GUIDANCE 10021 CPT CLEAR
The code is not valid for the selected date.

* Stay Level * Requested Days

NEXT CANCEL

If you search for a diagnosis or procedure and the code is expired, the search results show the code as Inactive.

The following example shows diagnosis search results that include expired diagnosis codes:

Diagnosis Search Result(s) Name contains Name starts with

Search by Diagnosis name (OR) Search by Code

SEARCH

Diagnosis name	Code	Code Set	Code Inactive
RETICULOSARCOMA UNSPEC SITE XTRANOD&SOLID ORGN	200.00	ICD9	Inactive
RETICULOSARCOMA OF LYMPH NODES OF HEAD FACE&NECK	200.01	ICD9	Inactive
RETICULOSARCOMA OF INTRATHORACIC LYMPH NODES	200.02	ICD9	Inactive
RETICULOSARCOMA OF INTRA-ABDOMINAL LYMPH NODES	200.03	ICD9	
RETICULOSARCOMA LYMPH NODES AXILLA&UPPER LIMB	200.04	ICD9	
RETICULOSARCOMA NODES ING REGION&LOWER LIMB	200.05	ICD9	
RETICULOSARCOMA OF INTRAPELVIC LYMPH NODES	200.06	ICD9	
RETICULOSARCOMA OF SPLEEN	200.07	ICD9	
RETICULOSARCOMA OF LYMPH NODES OF MULTIPLE SITES	200.08	ICD9	
LYMPHOSARCOMA UNSPEC SITE EXTRANODAL&SOLID ORGN	200.10	ICD9	
LYMPHOSARCOMA OF LYMPH NODES OF HEAD FACE&NECK	200.11	ICD9	
LYMPHOSARCOMA OF INTRATHORACIC LYMPH NODES	200.12	ICD9	
LYMPHOSARCOMA OF INTRA-ABDOMINAL LYMPH NODES	200.13	ICD9	
LYMPHOSARCOMA LYMPH NODES AXILLA&UPPER LIMB	200.14	ICD9	
LYMPHOSARCOMA LYMPH NODES ING REGION&LOWER LIMB	200.15	ICD9	

The next example shows procedure search results with expired procedure codes:

The screenshot shows the 'Procedure Search Result(s)' window. It includes a search bar with '100' entered and a 'SEARCH' button. Below the search bar is a table with the following columns: Procedure name, Code, Code Set, and Code Inactive. The table contains the following rows:

Procedure name	Code	Code Set	Code Inactive
PLMT SCJNCL RTA PROSTH&PLS&IMPLTJ INTRA-OC RTA	0100T	HCPCS	
ANESTHESIA SALIVARY GLANDS WITH BIOPSY	100	Revenue	
TOBACCO USE ASSESSED	1000F	HCPCS	
FINE NEEDLE ASPIRATION W/O IMAGING GUIDANCE	10021	CPT	Inactive
FINE NEEDLE ASPIRATION WITH IMAGING GUIDANCE	10022	CPT	
ANGINAL SYMPTOMS&LVL ACTV ASSESSED	1002F	HCPCS	Inactive
LVL ACTV ASSESSED	1003F	HCPCS	
ACNE SURGERY	10040	CPT	
CLINICAL SYMPTOMS VOL >LOAD ASSESSED	1004F	HCPCS	
ASTHMA SYMPTOMS EVALUATED	1005F	HCPCS	
INCISION & DRAINAGE ABSCESS SIMPLE/SINGLE	10060	CPT	
INCISION&DRAINAGE ABSCESS COMPLICATED/MULTIPLE	10061	CPT	
OSTEOARTHRITIS SYMPTOMS&FUNCIAL STATUS ASSES	1006F	HCPCS	
ANTI-INFLAMMATORY/ANALGESIC SYMPTOM RELIEF ASSES	1007F	HCPCS	

If you continue with the authorization workflow, for example by selecting **Next** or **Submit**, a Warning message informs you that there are expired codes. All expired codes are listed in the message.

In the following example, the diagnosis code is expired. A similar message appears for expired procedure codes.

The screenshot shows a warning dialog box titled 'WARNING' with the following text:

Expired Codes:
 Code: 200.00
 Name: RETICULOSARCOMA UNSPEC SITE
 XTRANOD&SOLID ORGN
 Diagnosis code is expired.

Click YES to continue with authorization workflow. Click NO to select another code.

The dialog box has 'YES' and 'NO' buttons. In the background, the 'Primary Diagnosis' field shows 'RETICULOSARCOMA UNSPEC SITE XTR' and a message states 'The code is not valid for the selected date.' The 'Primary Procedure' field shows 'ANESTHESIA HIP JOINT'.

In the next example, multiple codes are expired.

The screenshot shows the TruCare ProAuth interface with a warning dialog box. The background interface includes sections for 'Primary Diagnosis' (with code RETICULOSARCOMA UNSPEC SITE XTR), 'Primary Procedure' (with code FINE NEEDLE ASPIRATION W/O IMAGING), and 'Stay Level' (set to Medical). Red text indicates that the selected codes are not valid for the selected date. The warning dialog box, titled 'WARNING', lists two expired codes: Code: 200.00 (Name: RETICULOSARCOMA UNSPEC SITE XTRANOD&SOLID ORGN) and Code: 10021 (Name: FINE NEEDLE ASPIRATION W/O IMAGING). The dialog has 'YES' and 'NO' buttons at the bottom right. The main interface also has 'NEXT' and 'CANCEL' buttons at the bottom.

You can select **YES** to continue with the authorization workflow or select **NO** to go back and choose a different procedure or diagnosis.

Disallow invalid dates setting

When the TruCare Code Expiration Date Setting is **Disallow invalid dates**, TruCare ProAuth handles expired diagnoses or procedures as described in this section.

In TruCare ProAuth, you cannot create or extend an authorization that includes expired procedures or diagnoses. TruCare ProAuth informs you of expired codes in several ways.

If a diagnosis or procedure in an authorization is expired, it is highlighted in red and a message informs you that the code is not valid for the selected date and to select a different code.

In the following example, the procedure and diagnosis codes are expired.

TruCare ProAuth PROVIDER FILTER (0/80) TCAAdmin TCAAdmin

Create Inpatient Authorization

Prescreen Authorization Details Authorization Confirmation

* Admission Date: 07/27/2018 (MM/DD/YYYY)

* Member's Applied Eligibility: FL_CM

* Servicing Facility: dev facility al (Search by Provider name) (OR) Search by Provider NPI

⚠ Servicing Facility selected is out of network.

* Primary Diagnosis: RETICULOSARCOMA OF INTRATHORACIC LYMPH NODI (Search by Diagnosis name) 200.02 (OR) Search by Code ICD9

The code is not valid for the selected date. Select a different code.

* Primary Procedure: FINE NEEDLE ASPIRATION W/O IMAGING GUIDANCE (Search by Procedure name) 10021 (OR) Search by Code CPT

The code is not valid for the selected date. Select a different code.

* Stay Level: (OR) Search by Code

* Requested Days:

NEXT CANCEL

Searches for diagnosis or procedure codes do not include expired codes. If you search for a specific diagnosis or procedure and the code is expired, the search results do not display the code, as shown in the following example of a diagnosis code search. The same thing happens with an expired procedure search.

Diagnosis Search Result(s) Name contains Name starts with

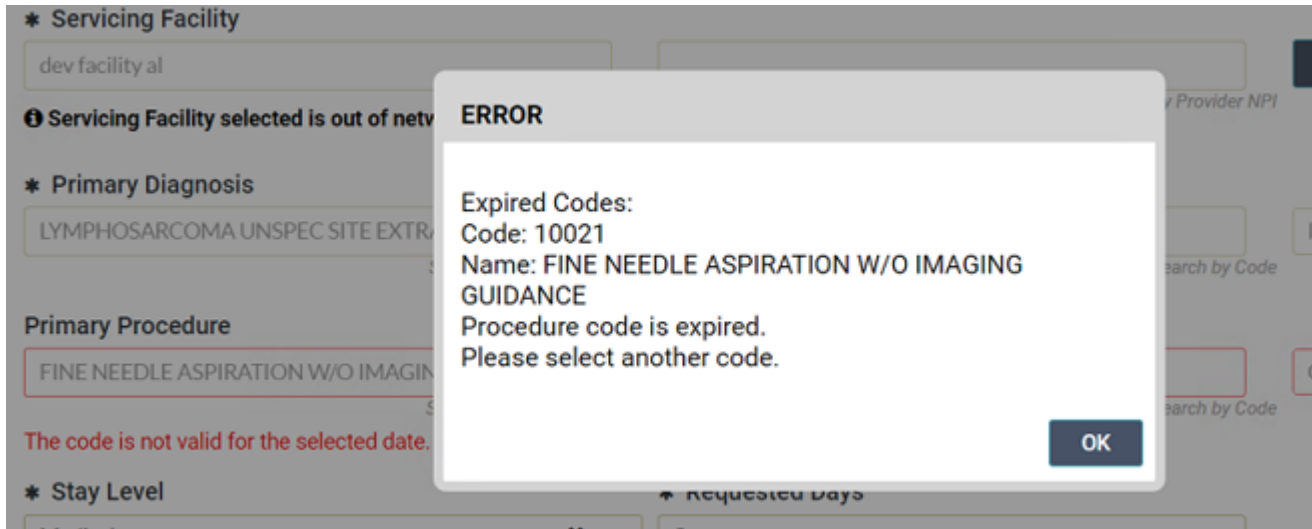
Search by Diagnosis name 200.02 (OR) Search by Code

SEARCH

Diagnosis name	Code	Code Set
No records found		

If you attempt to continue with the authorization workflow, for example by selecting **Next**, an Error message informs you that there are expired codes and to select another code. All expired codes are listed in the message.

In the following example, the procedure code is expired. A similar message appears for expired diagnosis codes.



You cannot continue with the authorization workflow. You must choose a valid (non-expired) diagnosis or procedure code.

When extending or adding a service to a service procedure authorization, if you specify dates that make the codes expired, you will get an error message telling you that the code is expired and that you cannot continue and to contact your health plan.

This can happen in the following service procedure authorization scenarios:

- When you extend an SP authorization and specify dates that make a diagnosis code or procedure code expired.
- When you add a service to an SP authorization and specify dates that make the procedure code expired.



TruCare ProAuth access from a member search in your parent portal

Some organizations configure their connection to TruCare ProAuth so that a member used in your parent portal can be passed directly to TruCare ProAuth, eliminating the need to search for the same member.

After successfully authenticating user access, TruCare ProAuth performs a member search, using the member ID that is transferred via a URL from your organization.

When you access TruCare ProAuth, one of the following scenarios will occur:

- If the member is found, TruCare ProAuth opens at the dashboard with the member in focus in the left navigation pane. Existing authorizations for this member for the past seven days are displayed (the Date of service From date defaults to seven days before current day). You can work with existing authorizations for the member or create new authorizations for the member.
- If the member is not found, TruCare ProAuth opens at the Member Search page. A message informs you that no member was found. You can try searching for a member on that page.
- If the URL from your organization does not include a member ID, TruCare ProAuth opens at the dashboard with no member in focus. You can search for a member or work with authorizations as needed.