

14 Enter a SAR – Physician/ Allied Provider

Introduction to Enter a SAR – Physician/ Allied Provider

The step-by-step instructions to “Enter a SAR” with a physician as the service provider is described in this section.

Whether the physician is an admitting physician at a hospital or performing services for a client outside of a hospital, the process to enter a SAR is the same.

Similarly when the service provider is an allied provider, the process for entering the SAR is exactly the same. The only difference is that the user will need to specify an allied provider rather than a physician as the service provider when entering a SAR.

Objectives

At the completion of this section, you will be able to:

- Enter a SAR with a physician as the service provider
- Add service codes and service groupings
- “Submit” the SAR for validation

14.1 Find the Client

1. Access Service Authorization Request by clicking the “Authorization” link within the Program Modules.



Notes

2. Enter search criteria in the “By Client” area
3. Click the “Find” button

Notes

California Home DHCS Home DHCS Organization Tuesday, December 28, 2010 1:50:25 P.M.

System Test
Caring for Children with Special Medical Needs... Contact Us | Help | Logout

Home Page | CCS Modules | Reports | Administration Web Messages (0)

Search - Service Authorization

BY CLIENT

Search Client

<input type="checkbox"/> Patient Name	Case #	CIN	SSN	DOB	Gender	County	
<input type="checkbox"/>					Select	Select	Find
<input checked="" type="checkbox"/> SKYWALKER,LUKE	7777777	30526372A4		01/13/2005	FEMALE	36	X

BY PROVIDER

Hospital / Medical Provider Special Care Centers Dental Provider

Provider Name Find Provider ID Find

BY SAR

SAR Number

Service Begin Date Service End Date

SAR Status

Advanced Search Options

Search Add SAR Clear

An example of searching for the client by Case #. Partial searches by name are permitted [Last Name, First Name].

Field descriptions are provided in CMS Net Web Online Help.

4. If an exact match is not found, system will display the ‘Search Results – List of Clients’ page.
5. Click the “Select” radio button for the desired client. If an exact match is found, the option button will be pre-selected.
6. Click ‘Continue’ button after selecting client.

https://mcalcmsint01d.cal.tdc.ad.teale.ca.gov/CMSWEBST/CMSWebDriver?actionName=ClientSearchActi - Windows Internet Explorer

https://mcalcmsint01d.cal.tdc.ad.teale.ca.gov/CMSWEBST/CMSWebDriver?actionName=ClientSearchAction&commandName=ClientSearchCommand&sisSearchPage=

Search Results - List of Clients

Select	Case Number	Caseload Code	Client Name	AKA	DOB	Gender	CIN	County	Reg	Med	F/R	Prgm End Date	Client Elig
<input checked="" type="radio"/>	7777777	36Z001	SKYWALKER,LUKE		01/13/2005	FEMALE	30526372A4	36	ACT	E	E		9N M/C only
<input type="radio"/>	7343631	34Z001	SKYWALKER,LUKE		10/05/2009	MALE	39730072A3	34	CLO			10/05/2010	9N M/C only
<input type="radio"/>	6543628	78Z001	SKYWALKER,LUKE		06/23/1923	MALE	34915172A6	78	ACT	E	E	04/29/2011	9J GHPP

Found 1-3 out of 3 Matching Records

Continue

7. Once client is selected, to add SAR, click the “Add SAR” button.

Patient Name	Case #	CIN	SSN	DOB	Gender	County	
<input type="checkbox"/>					Select	Select	Find
<input checked="" type="checkbox"/>	SKYWALKER,LUKE	7777777	30526372A4	01/13/2005	FEMALE	36	X

 If the client is not listed, click the “Authorization” link located above the blue banner to return to the Search SAR page.

Field descriptions are provided in CMS Net Web Online Help.

14.2 Select a Provider for the SAR

1. Click the “Hospital/Medical Provider” radio button.
2. Enter provider search information.
3. Click the “Search” button.

Notes

You may search for the provider by Provider ID.

Enter the 10 digit NPI # or Legacy Provider ID for hospital or medical providers is 9 characters. You may enter 8 characters to search.

To search for the physician by Provider Name, enter:
Last Name, First Name
Partial searches are permitted.

The “Provider Type” drop-down applies only to Hospital/ Medical providers.



To select a dental provider for a SAR, click the “Dental Provider” radio button and use search criteria (such as the Denti-Cal number in the Provider ID field, provider name, or the county).

To select a Special Care Center for a SAR, click the “Special Care Center” radio button and use search criteria.

Field descriptions are provided in CMS Net Web Online Help.

4. Confirm that for individual medical providers, the provider is paneled (look for a “Yes” in the Paneled column).
5. If additional matches are supplied, view them on the next page by: Clicking the “Next Records” link or clicking the “Prev Records” link.
6. Click on the link (blue underlined name of your selection) to select a provider.

Notes

The screenshot shows the 'System Test' interface for the DHCS. At the top, there are navigation links for 'California Home', 'DHCS Home', and 'DHCS Organization', along with the date and time: 'Thursday, December 2, 2010 4:28:32 P.M.'. Below this is the 'System Test' title and a subtitle 'Caring for Children with Special Medical Needs...'. There are also links for 'Contact Us', 'Help', and 'Logout'. A navigation bar includes 'Home Page', 'CCS Modules', 'Reports', and 'Administration', with 'Web Messages (2)' on the right. The main content area is titled 'List of Providers' and contains a table with the following data:

Provider Name/Address	Provider ID	Provider Type	Status	County	Paneled
DOHIL, MAGDALENE A M 3020 CHILDRENS WAY SAN DIEGO CA 92123	1528139383 00A862650	Physician	INDIRECT	SAN DIEGO	Yes

Below the table, there is a checkbox labeled 'Show All Statuses' which is checked. Underneath, it says '1-1 out of 1 Matching Records'. A search form is displayed with the following fields:

- Provider Name *
- Address 1 *
- City *
- State * (dropdown menu)
- Medical / Hospital (radio button, selected)
- Special Care Centers (radio button)
- Dental (radio button)
- Address 2
- County * (dropdown menu)
- Zip *

At the bottom of the search form are three buttons: 'Continue', 'Clear', and 'Back'.

Confirm that the individual medical provider is paneled.

If provider is not found, you may enter provider information to **DENY** the SAR.

Field descriptions are provided in CMS Net Web Online Help.

14.3 Enter SAR Information

1. Enter SAR information in the 'SAR Information' section.
2. Click the "Add Services" button to search for service codes.

California Home | DHCS Home | DHCS Organization Thursday, December 2, 2010 4:36:49 P.M.

System Test Contact Us | Help | Logout

Caring for Children with Special Medical Needs...

Home Page | CCS Modules | Reports | Administration Web Messages (2)

Enter SAR

LUKE SKYWALKER, 777777

Required fields are marked in *

SEARCH MEDS

CLIENT INFORMATION

Client Name:	LUKE SKYWALKER	Case Number:	777777	Date Of Birth:	01/13/2005	
Alias:		Med Elig Status:	ELIGIBLE	Application Status:	NO ACTION	
F/R Elig:	ELIGIBLE	Diagnostic Only:	NO	PSA Status:	NOT REQUIRED	
Reg Status:	ACTIVE	Client Elig Status:	9N M/C ONLY	Program Begin Date:	01/13/2010	
CI#: 30526372A4	Gender:	FEMALE	County:	SAN BERNARDINO	Program End Date:	01/12/2011
Caseload Code: 38Z001	MTU:		Language:	ENGLISH		

PROVIDER INFORMATION

Provider Name:	DOHIL, MAGDALENE A MD	Provider Number:	1528139383
Provider Type:	PHYSICIAN	Address 2:	
Address 1 *:	3020 CHILDRENS WAY	Address 2:	
City *:	SAN DIEGO	County:	San Diego
State *:	CA	Zip *:	92123 <input type="button" value="Find"/>
Phone No.:		Paneled Non PMF Provider:	<input type="button" value="Find"/>

SAR INFORMATION

SAR Number:		SAR Status:	
Service Begin Date *:	01/13/2010	Service End Date:	01/12/2011
Service Request Date *:	01/18/2011	Number of Days:	
EPSDT-SS:	<input type="checkbox"/>	Category:	Select
State Approved:	<input type="radio"/> Yes <input type="radio"/> No		
State Funded:	<input type="checkbox"/>	SAR County *:	San Bernardino
Primary Diagnosis*:	745.5 OSTIUM SECUNDUM TYPE ATRIAL SEPTAL D	<input type="button" value="Find"/>	
Secondary Diagnosis:		<input type="button" value="Find"/>	

SERVICE CODE INFORMATION

Remove	Service Code	Modifier	Type	Service Description	Units	Quantity	Amount
<div style="border: 1px solid #ccc; padding: 5px; min-height: 20px;"> <p>SPECIAL INSTRUCTIONS</p> </div>							

Notes

Enter SAR Information

The primary & secondary diagnosis default from Patient Registration.

If you wish to change the diagnosis clear the field and type the new code or word and click on the Find button.



Please see Business Rules chapter for a list of “Category” values that require State Approval.

Notes

This example shows how to associate a procedure code for a surgery.

You may search for procedure codes to associate to the SAR.

Service Code Groupings (SCG) can be issued to:

- Medical providers
- Dental Providers
- SCC Providers

*Search Medical SCG as 01-08.
Search Dental SCG as S01-S17.*

Only pharmacy provider types may be issued a SAR with an NDC.

Only medical supply provider types may be issued a SAR for “Medical Supplies:”

- ‘02’ Assist. Dev & sick rooms ply
- ‘21’ orthotists
- ‘24’ pharmacy
- ‘27’ podiatrist
- ‘29’ prosthetists
- ‘46’ rehab clinics

Search for the medical supply grouping (MSG) by highlighting the selections. To select more than one MSG or TCG, hold down the control (CTRL) key and click on the MSG title with the mouse.

14.4 Search for Services for Procedure Code

1. Select the radio button for the appropriate service code: procedure code, service grouping, drugs requiring specific authorization, and medical supplies.
2. Enter search criteria for one of the following: procedure code, service grouping, drugs requiring specific authorization, or medical supplies.
3. Click the “Search” button.

Home Page | CCS Modules | Reports | Administration Web Messages (2)

Search - Service Code

PROCEDURE CODE

Service Code

Description

SERVICE GROUPING

Service Group

Description

DRUGS REQUIRING SPECIFIC AUTHORIZATION

NDC

Generic Drug Name

Label Drug Name

MEDICAL SUPPLIES

Medical Supply Code

Generic Name

Label Name

MEDICAL SUPPLY/PROCEDURE GROUP

Medical Supply/Procedure Group

Search Tips:



Searching by a “Code” will return matches that *start with* whatever you type in that field.

Example for Service Code Field: “330”

Returns many matches among others: 33010 – Drainage of Heart Sac, 33011 – Repeat Drainage of Heart Sac, 33015 – Incision of Heart Sac



Searching by a “description,” returns matches that *contain* whatever you type in that field.

Example for Procedure Code Description Field: “Office Visit”

Returns many matches including: “Office Visit, New, Brief,” “Office Visit Limited,” and “PostPartum Follow-Up Office Visit.”

14.5 Select Services for Procedure Code

1. Check the appropriate service(s) for the SAR.
2. Click the “Continue” button.

Notes

California Home | DHCS Home | DHCS Organization | Friday, December 3, 2010 8:58:33 A.M.

System Test

Caring for Children with Special Medical Needs... | Contact Us | Help | Logout

Home Page | CCS Modules | Reports | Administration | Web Messages (2)

Search - Select Services

Service Code	Type	Service Description
33310	<input type="checkbox"/> ↓ <input checked="" type="checkbox"/> K <input type="checkbox"/> Q	EXPLORATORY HEART SURGERY
33315	<input type="checkbox"/> ↓ <input type="checkbox"/> K <input type="checkbox"/> Q	EXPLORATORY HEART SURGERY

Found 1-2 out of 2 Matching Records

Field descriptions are provided in CMS Net Web Online Help.

14.6 Enter More Service Codes

To add another service code (such as a service grouping), click the “Add Services” button.

California Home | DHCS Home | DHCS Organization Thursday, December 2, 2010 4:36:49 P.M.

System Test Contact Us | Help | Logout

Caring for Children with Special Medical Needs...

Home Page | CCS Modules | Reports | Administration Web Messages (2)

Enter SAR

LUKE SKYWALKER, 7777777 SEARCH MEDS

Required fields are marked in *

CLIENT INFORMATION

Client Name:	LUKE SKYWALKER	Case Number:	7777777	Date Of Birth:	01/13/2005
Alias:		Med Elig Status:	ELIGIBLE	Application Status:	NO ACTION
F/R Elig:	ELIGIBLE	Diagnostic Only:	NO	PSA Status:	NOT REQUIRED
Reg Status:	ACTIVE	Client Elig Status:	SN M/C ONLY	Program Begin Date:	01/13/2010
CI#:	30528372A4	County:	SAN BERNARDINO	Program End Date:	01/12/2011
Gender:	FEMALE	MTU:		Language:	ENGLISH
Caseload Code:	362001				

PROVIDER INFORMATION

Provider Name:	DOHIL, MAGDALENE A MD	Provider Number:	1528139383
Provider Type:	PHYSICIAN	Address 2:	
Address 1 *:	3020 CHILDRENS WAY	Address 2:	
City *:	SAN DIEGO	County:	San Diego
State *:	CA	Zip *:	92123 Find
Phone No.:		Paneled Non PMF Provider:	Find

Change Provider
Edit Provider

SAR INFORMATION

SAR Number: SAR Status:

Service Begin Date * Service End Date

Service Request Date * Number of Days

EPSDT-SS Category

State Approved Yes No

State Funded SAR County *

Primary Diagnosis * Find

Secondary Diagnosis Find

SERVICE CODE INFORMATION

Remove	Service Code	Modifier	Type	Service Description	Units	Quantity	Amount
<input type="checkbox"/>	33310	KC NU QE	K	EXPLORATORY HEART SURGERY			

SPECIAL INSTRUCTIONS

Special instructions

Add Services
Submit
Undo

14.7 Search/Select Services for Service Groupings

Under the appropriate service code:

1. Enter search criteria for one of the following: procedure code, service grouping, drugs requiring specific authorization, or medical supplies.
2. Click the “Search” button.

PROCEDURE CODE

Service Code

Description

SERVICE GROUPING

Service Group

Description

DRUGS REQUIRING SPECIFIC AUTHORIZATION

NDC

Generic Drug Name

Label Drug Name

MEDICAL SUPPLIES

Medical Supply Code

Generic Name

Label Name

MEDICAL SUPPLY/PROCEDURE GROUP

Medical Supply/Procedure Group

California Home | DHCS Home | DHCS Organization | Friday, December 3, 2010 9:10:28 A.M.

System Test | Contact Us | Help | Logout

Caring for Children with Special Medical Needs...

Home Page | CCS Modules | Reports | Administration | Web Messages (2)

Search - Select Services

Select	Service Code	Type	Service Description
<input checked="" type="checkbox"/>	01		PHYSICIAN

Found 1-1 out of 1 Matching Records

Field descriptions are provided in CMS Net Web Online Help.

Notes

In this example, we will add a service grouping for a “physician.”

Service Code Groupings (SCG) can be issued to:

- Medical providers
- Dental Providers
- SCC Providers

Search Medical SCG as 01-07.

Search Dental SCG as S01-S17.

14.8 Specify Service Code Information

For each service code that appears on the SAR:

- Check the “Remove” indicator if a code was entered erroneously.
- Select a Modifier for the Service Code if appropriate.
- Enter Units. The total number of times a procedure or service is requested. For drug codes: Enter the total number of times the authorized quantity is authorized (for example, a unit of “3” would be the original + two refills).
- Enter Quantity. Only for NDC drug or medical supply codes. Enter the total number of tablets, capsules, volume of liquid (in mls) or quantity of ointments/creams (in grams) for each dispensing.
- Enter Amount (only for EPSDT-SS SARs there is no price on file. This field is available to only those with access to update EPSDT-SS SARs.)

Notes

California Home | DHCS Home | DHCS Organization | Thursday, December 2, 2010 4:36:49 P.M.

System Test | Contact Us | Help | Logout

Caring for Children with Special Medical Needs...

Home Page | CCS Modules | Reports | Administration | Web Messages (2)

Enter SAR

LUKE SKYWALKER, 7777777 SEARCH MEDS

Required fields are marked *

CLIENT INFORMATION

Client Name: LUKE SKYWALKER Case Number: 7777777 Date Of Birth: 01/13/2005
 Alias: _____
 F/R Elig: ELIGIBLE Med Elig Status: ELIGIBLE Application Status: NO ACTION
 Reg Status: ACTIVE Diagnostic Only: NO PSA Status: NOT REQUIRED
 CIL#: 30526372A4 Client Elig Status: 9N M/C ONLY Program Begin Date: 01/13/2010
 Gender: FEMALE County: SAN BERNARDINO Program End Date: 01/12/2011
 Caseload Code: 36Z001 MTU: _____ Language: ENGLISH

PROVIDER INFORMATION

Provider Name: DOHIL, MAGDALENE A MD Provider Number: 1528139383
 Provider Type: PHYSICIAN
 Address 1 * 3020 CHILDRENS WAY Address 2 _____
 City * SAN DIEGO County San Diego
 State * CA Zip * 92123 Find
 Phone No. _____ Panned Non PMF Provider _____ Find

Change Provider Edit Provider

SAR INFORMATION

SAR Number _____ SAR Status _____
 Service Begin Date * 01/13/2010 Service End Date 01/12/2011
 Service Request Date * 01/18/2011 Number of Days _____
 EPSDT-SS Category Select
 State Approved Yes No
 State Funded SAR County * San Bernardino
 Primary Diagnosis * 745.5 OSTIUM SECUNDUM TYPE ATRIAL SEPTAL I Find
 Secondary Diagnosis _____ Find

SERVICE CODE INFORMATION

Remove	Service Code	Modifier	Type	Service Description	Units	Quantity	Amount
<input type="checkbox"/>	33310	KC NU QE	K	EXPLORATORY HEART SURGERY	1		
<input type="checkbox"/>	01	KC NU QE		PHYSICIAN	1		

SPECIAL INSTRUCTIONS

_____ Special instructions

Add Services Submit Undo

Modifier:
 “Rental” and “Purchase” selections for “Modifier” should be used for DME & DME accessories only.
 “Assistant Surgeon” selection for “Modifier” should **ONLY** be used when the procedure is done separately from the primary physician’s authority. It should NEVER be on the same SAR as the surgery that the primary physician is performing.

Units: Units is a required field.

Units: One unit has already been pre-filled for the user for the “Physician” service grouping.

14.9 Click “Submit” to Complete SAR Entry

Perform one of the following actions:

- Click the “**Submit**” button to save the SAR. The status of the SAR will be “Pending.” The user will be taken to the Case Notes to enter narrative.
- Click the “Undo” button to exit from the SAR Entry page. The SAR will not be saved.

Notes

California Home DHCS Home DHCS Organization Thursday, December 2, 2010 4:36:49 P.M.

System Test
Caring for Children with Special Medical Needs... Contact Us | Help | Logout

Home Page | CCS Modules | Reports | Administration Web Messages (2)

Enter SAR

LUKE SKYWALKER, 7777777

Required fields are marked in *

[SEARCH MEDS](#)

CLIENT INFORMATION

Client Name:	LUKE SKYWALKER	Case Number:	7777777	Date Of Birth:	01/13/2005
Alias:		Med Elig Status:	ELIGIBLE	Application Status:	NO ACTION
F/R Elig:	ELIGIBLE	Diagnostic Only:	NO	PSA Status:	NOT REQUIRED
Reg Status:	ACTIVE	Client Elig Status:	SN M/C ONLY	Program Begin Date:	01/13/2010
CIN:	30526372A4	County:	SAN BERNARDINO	Program End Date:	01/12/2011
Gender:	FEMALE	MTU:		Language:	ENGLISH
Caseload Code:	36Z001				

PROVIDER INFORMATION

Provider Name:	DOHL, MAGDALENE A MD	Provider Number:	1528139383
Provider Type:	PHYSICIAN		
Address 1 *	3020 CHILDRENS WAY	Address 2	
City *	SAN DIEGO	County	San Diego
State *	CA	Zip *	92123 Find
Phone No.		Paneled Non PMF Provider	Find

Change Provider
Edit Provider

SAR INFORMATION

SAR Number SAR Status

Service Begin Date * 01/13/2010 Service End Date 01/12/2011

Service Request Date * 01/18/2011 Number of Days

EPSDT-SS Category Select

State Approved Yes No

State Funded SAR County * San Bernardino

Primary Diagnosis * 745.5 OSTIUM SECUNDUM TYPE ATRIAL SEPTAL [Find

Secondary Diagnosis Find

SERVICE CODE INFORMATION

Remove	Service Code	Modifier	Type	Service Description	Units	Quantity	Amount
<input type="checkbox"/>	33310	KC NU QE	K	EXPLORATORY HEART SURGERY	1		
<input type="checkbox"/>	01	KC NU QE		PHYSICIAN	1		

SPECIAL INSTRUCTIONS

Special instructions

Add Services
Submit
Undo

Field descriptions are provided in CMS Net Web Online Help.

After clicking the 'Submit' button, system will take you to the Case Notes.

- Enter comments and click 'Save' or click 'Continue'

Notes

The screenshot shows the 'Case Notes' web application interface. At the top, there is a navigation bar with links for 'Home Page', 'CCS Modules', 'Reports', and 'Administration', and a 'Web Messages (2)' indicator. The main heading is 'Case Notes', with a sub-heading 'Main Case Notes screen'. Below this is a blue bar labeled 'CASE NOTES' and a note: 'Required fields are marked in *'. The form is divided into sections: 'CLIENT INFORMATION' with fields for 'Client Name: LUKE SKYWALKER', 'Case Number: 7777777', and 'Date Of Birth: 01/13/2005'; 'CASE NOTE DETAILS' with 'Entry Date: 12/03/2010', 'Subject *' (text input with 'SAR-Pending'), and 'Service Authorization status' (dropdown menu with 'Pending'); 'Details' with 'SAR #: 97025820440', 'Provider: DOHIL, MAGDALENE A MD', 'Service Begin Date: 01/13/2010', and 'Service End Date: 01/12/2011'; and a 'Narrative' section with a large text area and a 'Number of characters left: 15000' indicator. At the bottom, there are 'Save' and 'Continue' buttons. An arrow points from the 'Save' button to a yellow callout box on the right.

Pending SAR:

If you enter comments and clicks Save, the case note will save. Clicking 'Continue' for a pending SAR will not save a case note.