Provider Electronic Data Interchange (PEDI)

SAR User Guide
# AMENDMENTS

<table>
<thead>
<tr>
<th>Amendment</th>
<th>Description</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Created by Molly P. for the new PEDI (Release 88)</td>
<td>2020–03–11</td>
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</table>
| 2.0       | Updated by Molly P.  
Part 1)  
Added the following new sections:  
- 4.2 How to Play Webinar  
- 4.3 Troubleshooting  
  Problem viewing PEDI Website  
- 6.4 How to Physically Print an Authorization  
  Edge: How to Physically Print an Authorization  
  Chrome: How to Physically Print an Authorization  
- 6.5 SAR Denial Letter – How to View/Print  
Part 2)  
Updated the following eSAR sections 9.1, 9.2, and 9.3:  
- Added to each sections how to find/add service code grouping.  
- Added to each sections examples for each SCG codes and SCG descriptions.  
Part 3)  
Added webinars URL address links to appropriate manual sections for users to easily click to view. | 2020–03–30 |
# TABLE OF CONTENTS

Amendments ............................................................................................................................................ 2  
LIST OF FIGURES ...................................................................................................................................... 6  
1 Definitions, Abbreviations, & Acronyms ................................................................................................. 9  
2 Introduction ........................................................................................................................................... 10  
3 Objectives ............................................................................................................................................ 11  
4 Training: Webinars & Troubleshooting .................................................................................................... 12  
  4.1 Webinar ............................................................................................................................................ 12  
  4.2 How to Play Webinar ......................................................................................................................... 13  
     Instructions on how to play webinar on Media Player ........................................................................... 13  
  4.3 Troubleshooting ................................................................................................................................ 15  
5 PEDI: Landing Page (Home) ................................................................................................................... 16  
  5.1 Landing Page (Home) ......................................................................................................................... 16  
     Menu ................................................................................................................................................... 16  
     Widgets ............................................................................................................................................. 17  
6 SAR ............................................................................................................................................................ 18  
  6.1 SAR .................................................................................................................................................... 18  
  6.2 Search Results – List of SARs ............................................................................................................ 22  
  6.3 View SAR Details ................................................................................................................................ 23  
  6.4 How to Physically Print an Service Authorization Request (SAR) .................................................... 24  
     Edge: How to Physically Print an SAR ............................................................................................... 24  
     Chrome: How to Physically Print an SAR ......................................................................................... 25  
  6.5 SAR Denial Letter – How to View/Print .............................................................................................. 26  
     Instructions to View SAR Denial Letters............................................................................................. 26  
  6.6 SAR Status Descriptions ..................................................................................................................... 27  
  6.7 SAR Review Status .............................................................................................................................. 28  
7 Client ......................................................................................................................................................... 30

Definitions, Abbreviations, & Acronyms

3 of 93

4/1/2020
7.1 Search Client.................................................................................................... 30
7.2 Search Results: Client.................................................................................... 32
8 Search Results for the selected Client ................................................................... 33
  8.1 Client Information Section.............................................................................. 35
  8.2 Search Results – List of SARs ....................................................................... 36
  8.3 Search Results – List of Referrals ................................................................. 37
  8.4 Search Results – List of Correspondence .................................................... 38
9 eSAR: SAR Fillable Form..................................................................................... 40
  9.1 Request new eSAR: New Client ................................................................... 41
    Trading Partner Information ............................................................................. 43
    Subscriber .......................................................................................................... 44
    Dependent ........................................................................................................... 45
    Additional Information ...................................................................................... 47
    Service Provider or Organization ...................................................................... 48
    Service Request ................................................................................................. 49
    Service Code Information .................................................................................. 50
    Contact Information .......................................................................................... 52
    Attachments ........................................................................................................ 53
  9.2 Request new eSAR: Established Client .......................................................... 56
    Search and Select Client → Click Add eSAR.................................................... 56
    SAR Fillable Form: Trading Partner & Client Information ................................... 58
    Subscriber and Dependent ............................................................................... 60
    Service Provider or Organization ...................................................................... 61
    Service Request ................................................................................................. 62
    Service Code Information .................................................................................. 63
    Contact Information .......................................................................................... 65
    Attachments ........................................................................................................ 66
  9.3 SAR Modification Request ............................................................................ 69
    Service Provider or Organization ...................................................................... 73
    Service Request ................................................................................................. 74
Service Code Information .............................................................. 75
Contact Information .............................................................................. 77
Attachments .......................................................................................... 78
Submit ..................................................................................................... 79
9.4 SAR Duplicate Check .......................................................................... 80
   How the Duplicate Check Works ............................................................ 81
9.5 Attachments ....................................................................................... 82
   Add Attachments .................................................................................. 85
   Modify Attachments ............................................................................. 88
   Remove Attachment.............................................................................. 89
9.6 View SAR Rejection Message ............................................................. 90
10 eSAR County Assignment ..................................................................... 91
   10.1 How eSAR is assigned to Client’s County: CCS & GHPP ............... 91
   10.2 eSAR Request Assigned to Incorrect or Another County .............. 92
11 What is an eSAR/eSAR Role ................................................................. 93
   11.1 What is an eSAR? ........................................................................ 93
      11.1.1 eSAR Role ........................................................................... 93
      11.1.2 Do you have an eSAR role? .................................................... 93
LIST OF FIGURES

Figure 4-1, Training: Webinars ................................................................. 12
Figure 4-2, Search – Media Player ............................................................... 13
Figure 4-3, File – Open URL .................................................................... 14
Figure 4-4, Open URL – Enter URL ............................................................ 14
Figure 4-5, Visual Delay on Screen ............................................................. 15
Figure 5-1, Menu ....................................................................................... 16
Figure 5-2, Menu ....................................................................................... 16
Figure 5-3, Landing Page ........................................................................... 17
Figure 6-1, SAR ......................................................................................... 18
Figure 6-2, Search SAR – By Provider ......................................................... 20
Figure 6-3, Search SAR – By Service Code ................................................ 21
Figure 6-4, Search Results – List of SARs .................................................. 22
Figure 6-5, View SAR Details ..................................................................... 23
Figure 6-6, SAR – Print Icon ..................................................................... 24
Figure 6-7, SAR – Print Icon on Edge .......................................................... 24
Figure 6-8, SAR – Print Icon on Chrome ...................................................... 25
Figure 6-9, SAR – Print PDF Chrome .......................................................... 25
Figure 6-10, List of Correspondence .......................................................... 26
Figure 6-11, SAR – Print Icon ................................................................... 27
Figure 6-12, SAR Review Status ................................................................. 28
Figure 7-1, Client Menu ........................................................................... 30
Figure 7-2, Search Client .......................................................................... 31
Figure 7-3, Search Result – No records Found .......................................... 32
Figure 7-4, Search Result – Client ............................................................... 32
Figure 8-1, Search Result – Client ............................................................... 33
Figure 8-2, List of Correspondence ............................................................ 34
Figure 8-3, Client Information section ....................................................... 35
Figure 8-4, Search Results – List of SARs .................................................. 36
Figure 8-5, Search Results – List of Referrals ............................................ 37
Figure 8-6, Search Results – List of Correspondence ............................... 38
Figure 9-1, Client Menu ........................................................................... 41
Figure 9-2, Add SAR ................................................................................ 41
Figure 9-3, SAR Fillable Form ................................................................. 42
Figure 9-4, Trading Partner Information ................................................... 43
Figure 9-5, CCS/GHPP Indicator ............................................................... 43
Figure 9-6, Subscriber ............................................................................... 44
Figure 9-7, Dependent ............................................................................. 45
Figure 9-8, Additional Information ........................................................... 47
Figure 9-9, Service Provider or Organization ................................................................ 48
Figure 9-10, Service Request ...................................................................................... 49
Figure 9-11, Service Code Information ................................................................. 50
Figure 9-12, Service Code Overlay ........................................................................... 50
Figure 9-13, Service Code Displays ......................................................................... 51
Figure 9-14, Contact Information .............................................................................. 52
Figure 9-15, Attachments ......................................................................................... 53
Figure 9-16, Upload Attachments ............................................................................. 54
Figure 9-17, Attachment Report Type ....................................................................... 55
Figure 9-18, Success Message .................................................................................. 55
Figure 9-19, Search Results - Client ......................................................................... 56
Figure 9-20, Add eSAR ............................................................................................ 57
Figure 9-21, SAR Fillable Form ................................................................................. 58
Figure 9-22, Client Information ............................................................................... 59
Figure 9-23, Dependent ............................................................................................. 60
Figure 9-24, Service Provider or Organization ....................................................... 61
Figure 9-25, Service Request ................................................................................... 62
Figure 9-26, Service Code Information ..................................................................... 63
Figure 9-27, Service Code Overlay .......................................................................... 63
Figure 9-28, Service Code Displays ......................................................................... 64
Figure 9-29, Contact Information ............................................................................. 65
Figure 9-30, Attachments ......................................................................................... 66
Figure 9-31, Upload Attachment ............................................................................... 66
Figure 9-32, Upload Attachment ............................................................................... 67
Figure 9-33, Success Message ................................................................................. 68
Figure 9-34, SAR Number Column .......................................................................... 69
Figure 9-35, SAR Number - Hyperlink .................................................................... 70
Figure 9-36, SAR Fillable Form ............................................................................... 71
Figure 9-37, Subscriber or Dependent ...................................................................... 72
Figure 9-38, Service Provider or Organization ....................................................... 73
Figure 9-39, Service Request .................................................................................. 74
Figure 9-40, Service Code Information .................................................................... 75
Figure 9-41, Contact Information ............................................................................. 77
Figure 9-42, Attachments ......................................................................................... 78
Figure 9-43, Submit – Success Message .................................................................. 79
Figure 9-44, Duplicate Check Overlay ...................................................................... 81
Figure 9-45, Success Message .................................................................................. 81
Figure 9-46, SAR Fillable Form - Attachments ....................................................... 83
SAR User Guide

Figure 9-47, Search Results: List of SARs (Click >) SAR Number ........................................ 84
Figure 9-48, Attachments + .................................................................................................. 85
Figure 9-49, Attachments - Upload .................................................................................... 85
Figure 9-50, Attachments – Add Attachment Report Type ................................................ 85
Figure 9-51, Attachments – Attachment Report Type Check Box ...................................... 86
Figure 9-52, Attachment Report Type – Show More .......................................................... 87
Figure 9-53, Modify Attachments ..................................................................................... 88
Figure 9-54, Remove Attachments .................................................................................... 89
Figure 9-55, eSAR Rejection Details .................................................................................. 90
Figure 11-1, Add eSAR - Disabled ..................................................................................... 93
Figure 11-2, Add eSAR - Enabled ...................................................................................... 93
# 1 Definitions, Abbreviations, & Acronyms

The following terms, abbreviations, and acronyms may be used in this document:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>CCS</td>
<td>California Children’s Services</td>
</tr>
<tr>
<td>CIN</td>
<td>Client Identification Number</td>
</tr>
<tr>
<td>CMS</td>
<td>Children’s Medical Services</td>
</tr>
<tr>
<td>CMS Net</td>
<td>CMS Case Management System</td>
</tr>
<tr>
<td>CMS Net Web</td>
<td>CMS Case Management System: Web Application</td>
</tr>
<tr>
<td>DHCS</td>
<td>Department of Health Care Services</td>
</tr>
<tr>
<td>eSAR</td>
<td>Electronic Service Authorization Request</td>
</tr>
<tr>
<td>EPSDT</td>
<td>Early and Periodic Screening, Diagnosis, and Treatment</td>
</tr>
<tr>
<td>GHPP</td>
<td>Genetically Handicapped Persons Program</td>
</tr>
<tr>
<td>HCP or HP</td>
<td>Health Care Plan</td>
</tr>
<tr>
<td>ICD</td>
<td>Int’l Classification of Diseases (Diagnosis/Procedure Code)</td>
</tr>
<tr>
<td>ISCD</td>
<td>Integrated Systems of Care Division</td>
</tr>
<tr>
<td>IE</td>
<td>Internet Explorer (Microsoft web browser)</td>
</tr>
<tr>
<td>Inappropriate Letter</td>
<td>A letter sent to the Provider/Managed Care Plan/HF informing them the referral is incomplete, inaccurate or needs more clarification.</td>
</tr>
<tr>
<td>JPG</td>
<td>Joint Photographic Experts Group</td>
</tr>
<tr>
<td>MCP</td>
<td>Managed Care Plan</td>
</tr>
<tr>
<td>PEDI</td>
<td>Provider Electronic Data Interchange</td>
</tr>
<tr>
<td>PMF</td>
<td>Provider Master File (Medi-Cal Provider list)</td>
</tr>
<tr>
<td>NPI</td>
<td>National Provider Identifier</td>
</tr>
<tr>
<td>PDF</td>
<td>Portable Document Format</td>
</tr>
<tr>
<td>PSSN</td>
<td>Pseudo Social Security Number</td>
</tr>
<tr>
<td>Requestor</td>
<td>Any referral source other than a provider listed in the PMF (Non–PMF provider)</td>
</tr>
<tr>
<td>SAR</td>
<td>Service Authorization Request</td>
</tr>
<tr>
<td>SCC</td>
<td>Special Care Center</td>
</tr>
<tr>
<td>SCG</td>
<td>Service Code Groupings</td>
</tr>
<tr>
<td>SSN</td>
<td>Social Security Number</td>
</tr>
<tr>
<td>TIF, TIFF</td>
<td>Tagged Image File Format</td>
</tr>
<tr>
<td>TP</td>
<td>Trading Partner</td>
</tr>
</tbody>
</table>
Children’s Medical Services Network (CMS Net) Provider Electronic Data Interchange (PEDI), hereafter known as CMS Net PEDI is an on-line interface for approved Providers, Hospitals and Managed Care Plans to search for California Children Services (CCS) and Genetically Handicapped Persons Program (GHPP) Service Authorization Requests (SARs). SARs for all counties in the State of California are included. The CMS Net PEDI is accessed via a secure Department of Health Care Services (DHCS) website, and encompasses security measures for access.

In addition, PEDI allows “provider” organizations that submit a valid Trading Partner agreement and are approved by CMS Net Help Desk to submit Electronic Service Authorization Request (eSAR) to CMS Net System for county/state staff to review.
3 OBJECTIVES

CMS Net PEDI will allow you to:

- Determine if the CMS Net user has entered a Service Authorization Request (SAR) to a provider in your organization (Provider Type) or a client enrolled in your Managed Care Plan (MCP) for the MCP user.
- Determine the status of SAR (i.e. authorized, denied, modified, extended or cancelled).
- Print copies of SARs, Notices of Action, or Denial letters.
- Search for California Children’s Service (CCS) and Genetically Handicapped Persons Program (GHPP) clients that have SARs in your organization.
- Run reports for your organization.
- Electronic Service Authorization Request (eSAR) topics; which include the following:
  - Request eSAR for CCS/GHPP client
  - Adding attachments
  - Understanding eSAR rejection
  - Understanding SAR Review Status
  - Understanding duplicate SAR check
  - How eSAR county is assigned
  - Determine if logged in user has eSAR role
4 TRAINING: WEBINARS & TROUBLESHOOTING

4.1 Webinar
Webinars are available for most sections of this manual.

To view webinars, click on Training to navigate to Webinars widget displaying all webinars.
4.2 How to Play Webinar

Webinar links are added to certain sections in this manual as a visual reference.
If clicking on the link errors out, then you need to copy the web URL and open it in Media Player.
When clicking on the webinar link errors out, use the below instructions to view the webinar.

Instructions on how to play webinar on Media Player
1. To view webinar on Media Player, click Search icon to search for Media Player from your PC.
2. Type Media Player on the search field.
3. Click Window Media Player (Note: if you cannot find Media Player, then you need to install it).

4. Once Media Player opens, click File. Select “Open URL…”

Figure 4-2, Search – Media Player
5. Copy and paste the webinar URL address link into the “Open:” field and click OK button to play the video.
6. Note that it may take a couple of seconds—one minute for the visual to appear on screen as seen below.

![Figure 4-5, Visual Delay on Screen](image)

4.3 **Troubleshooting**

Problem viewing the PEDI Website such as encountering issues where SAR information is not correct on a client or no SARs showing up for a selected client?

Here are some steps to fix/narrow down the issue. Contact the CMS Net Help Desk at [cmshelp@dhcs.ca.gov](mailto:cmshelp@dhcs.ca.gov) if you need further help.

1) Have you tried another web browser? Edge and Chrome seem to work better than other browsers.

2) Have you cleared your temporary files on your browser? If not, click on this link for instructions: [https://cmsprovider.cahwnet.gov/cmshelp/clearinternettempfiles.pdf](https://cmsprovider.cahwnet.gov/cmshelp/clearinternettempfiles.pdf)

   Or

   On Menu icon, click on Support → Troubleshoot section → Click to view “Problem viewing PEDI Website” and follow the instructions.

3) Your system may be auto filling your fields. Do you have auto fill on? If yes, turn it off.

4) Do you have the latest web browser (Internet Explorer/Edge/Chrome/Firefox/Safari etc.) updates installed?

5) Do you have the latest Operating System updates installed (check with local IT)?

6) Do you have any specific organizational security policies that may prevent PEDI from performing certain operations such as asynchronous calls (check with local IT)?

7) Have you read the PEDI manuals, watched the PEDI webinars, and trained yourself on performing the actions you do on an everyday basis in the new system?
5.1 Landing Page (Home)
When you successfully logon to PEDI, the system defaults you to the landing page (Home Page).

![Menu Diagram]

**Menu**

**Client**: click on Client to navigate to the Search Client page to search by client.

**SAR**: click on SAR to navigate to the Search SAR page to search by SAR number or date range.

**Reports**: click on Reports to navigate to the Report page to run reports.

**Profile**: click on Profile to navigate to the Profile page to update your password, set your preferences, and update your profile information.

**Support**: click on Support to navigate to the CMS Net Help Desk contact info, County Offices for California Children's Services (CCS) list, CMS Net Provider Electronic Data Interchange (PEDI) Liaison List, Subscribe to Notifications, GHPP Contact Information, CCS Provider Services, Provider and Facility Site Review Unit, Resources, and Troubleshoot.

**Policy**: click on Policy to navigate to the documents list displaying the Liaison Agreement, Trading Partner Agreement, and California Code of Regulations.

**Training**: click on Training to navigate to the list of manuals and webinars.

**Admin**: click on Admin to navigate to the organization to perform liaison related activities.

Available only to Liaison(s) and System administrators.
Widgets

Users in “provider” organizations have the Organization and All Electronic Service Authorization Requests widgets. Users with eSAR role will have the My Electronic Service Authorization Requests widget.

1) Organization widget: Displays your organization’s name and your liaison information.

2) Service Authorization Request widgets are only related to eSARs.

- All Electronic Service Authorization Requests widget: Displays all the SARs entered by all staff in your organization.
- My Electronic Service Authorization Requests widget: Displays all the SARs that the current logged in user had submitted.

Click on the number counter (#) of the eSAR status you want to view. PEDI will then navigate you to Search Results – List of SARs for that eSAR status. All SAR Statuses except Deleted will show on the widgets.
6.1 SAR
User may access the SAR page by clicking on the SAR option from the top menu, once logged in the PEDI system.

URL link to Search SAR webinar: https://cmsprovider.cahwnet.gov/webinar/pedi/searchsar.mp4
(Follow Instruction from 4.2 section if video does not play)

1) **Search SAR**: The Search SAR page allows you to search by SAR and date range to display the list of SARs.

Click on the SAR menu to navigate to the Search SAR.

SAR page has the following sections:

- Search SAR
- Search Results – List of SARs

![Search SAR](image)

*Figure 6-1, SAR*
SAR User Guide

You may enter the SAR number in the Service Authorization Request Number field to search by SAR number or search by date range in combination with the other search fields.

You may search using the following fields:
- Service Authorization Request Number: this field is a one-to-one match.
- Proposed or Actual Service Date Begin
- Proposed or Actual Service Date End
- County: dropdown list
- Status: dropdown list
- Last Update Begin Date
- Last Update End Date
- Classification: dropdown list: Medical, SCC, Dental
- User: dropdown list: Last name, First name
2) **By Provider:** SARs can be searched by provider in combination with service dates or status.

![Search SAR by Provider](image)

You may search by the following:
- Provider Type: Select from Drop down
- Service Provider or Organization Name
- Provider Identifier
3) **By Service Code:** you may also search by procedure code or description in the same field.

![Figure 6-3, Search SAR – By Service Code](image)
6.2 Search Results – List of SARs

Continued from SAR section.

Once you have executed your search, the search result displays under the Search Results – List of SARs.

The Search Results – List of SARs section has list of SARs and an Add eSAR button.

- Add eSAR button: on click takes user to the SAR Fillable Form for new client (blank form).
  
  Note:
  - The Add eSAR button is enabled/disabled depending upon user’s eSAR privileges.
  - To do eSAR for selected client, go to Search Client and select a client.

- SAR Number: hyperlink appears on SAR number that can be modified.

- SAR Number hyperlink: when clicked on takes user to next screen (SAR Fillable Form) to modify the SAR.

- Print icon: enabled only for Authorized, Cancelled (opens PDF of SAR), disabled for Denied, Deleted, Awaiting Service Review, Pending, and Request Approval Y/N.
6.3 View SAR Details

- To view the SAR details, click > to left of SAR number to expand SAR to view SAR detail.

Figure 6-5, View SAR Details
6.4 How to Physically Print an Service Authorization Request (SAR)

Every web browser function differently for printing. Below is just two common methods to print when using Edge and Chrome web browser when clicking on the Print icon.

**Edge: How to Physically Print an SAR**

1. For an Authorized or Cancelled SAR, click on the print icon.
2. Click on Print icon to open PDF on screen.
3. Once PDF opens, do a right mouse click anywhere on the authorization PDF.
4. Select *Print* option to print.
Chrome: How to Physically Print an SAR

1. For an Authorized or Cancelled SAR, click on the print icon.

2. Click on Print icon to open PDF on screen. At the bottom of your screen, click the PDF to open/view.

3. Once the PDF opens in new tab, do a right mouse click on the SAR PDF. Select *Print* option to print.

When done, close down the PDF so you don’t have too many tab open.
6.5 SAR Denial Letter – How to View/Print

Below is the instructions on how to print SAR denial letters.

Note: CMS Net Staffs knows it is inconvenience for users printing this method and a future Change Request to make the SAR denial letter print the same method as Authorized and Cancelled SAR is coming.

Until the new design is implemented, the letter for SAR denial letters are down under the Search Results – List of Correspondence section.

Instructions to View SAR Denial Letters

1. Start off by searching for a client. Click the Client menu icon to go to the “Search Client” page.
2. Then search and select client found under Search Results – Client by clicking on the client’s name hyperlink.
3. Once the client is selected, the system takes the user to the selected client page. The page displays the following sections:
   - Client Information
   - Search Results – List of SARs
   - Search Results – List of Correspondence
4. The denial letter is down under “Search Results – List of Correspondence” section. Scroll down to that Search Results – List of Correspondence section and find the denial letter for the denied SAR you wish to view.
5. Click on the print icon to expand to view the PDF

- If on Edge, PDF opens on screen. Then do right mouse click on PDF to physically print.
- If on Chrome, PDF opens as a download, you must click to open PDF and it will appear on a new tab. Then do right mouse click on PDF to physically print.

Note:
SAR in Authorized and Cancelled statuses may be print directly from the Search Results – List of SARs section.

6.6 SAR Status Descriptions

- Authorized: SAR that has been authorized.
- Awaiting Service Review: eSAR with a temporary number waiting for CMS Net staff to review.
- Cancelled: SAR that has been cancelled.
  - Note that a cancelled SAR is still a valid SAR from the service begin date to the service end date.
- Denied: SAR that is in denied status.
- Pending: SAR that is in pending Status.
- Deleted: SAR that has been rejected/deleted.
6.7 SAR Review Status

SAR Review Status value is set by CMS Net user.

URL link to SAR Review Status webinar:
https://cmsprovider.cahwnet.gov/webinar/pedi/sarreviewstatus.mp4

(Follow Instruction from 4.2 section if video does not play)

- Note that there are more than a dozen review statuses that CMS Net user uses set on SAR for their own internal SAR routing and the review status is viewable in PEDI.
- There are some review reasons that CMS Net user may use to communicate to PEDI user.

The review reasons added related to PEDI that CMS Net user may use to communicate to PEDI user are:

- PEDI: See Special Instructions
- PEDI: Awaiting Provider Documentation

The Review Status value is set by CMS Net user on SAR with the following statuses:

- Pending SAR
- Awaiting Service Review eSAR

![Figure 6-12, SAR Review Status]
EX 1: Example of an Awaiting Service Review eSAR.
- Awaiting Service Review eSAR has a review status.

EX 2: Example of an Awaiting Service Review eSAR for a Pending SAR.
- Pending SAR in this example does not have a review status.
- Awaiting Service Review eSAR has a review status.

EX 3: Example of an authorized SAR with an Awaiting Service Review eSAR.
- Awaiting Service Review eSAR has a review status.

EX 4: Example of an Awaiting Service Review eSAR for a Pending SAR.
- Pending SAR in this example has a review status.
- Awaiting Service Review eSAR does not have a review status.

EX 5: Example of an Awaiting Service Review eSAR for a Pending SAR.
- Pending SAR in this example has a review status.
- Awaiting Service Review eSAR has a review status.
Search Client is used to search for client.

Note that PEDI is an application that allows user to view SARs for clients enrolled in the Managed Care Plan or being seen by the provider in the organization.

### 7.1 Search Client

This section shows user how to search for client.

URL link to *Search Client* webinar:

https://cmsprovider.cahwnet.gov/webinar/pedi/searchclient.mp4

(Follow Instruction from 4.2 section if video does not play)

User should be able to access the client screen by clicking on the Client option from the top menu, once logged in the PEDI system.

Client page will have the following accordions on the page:

- Search Client
- Search Results – Client

**Steps to search for client:**

1) Click the Client option to navigate to Search Client page.

Search Client section: you may search by client to display the list of SARs, Referrals and correspondence.
2) On the Search Client page, to search for client, enter one of the identifiers.

![Search Client](image)

**Figure 7-2, Search Client**

You may not have other search criteria when searching with the following unique field: Case Number, Client Index Number, and Referral Number.

The following identifiers may be used in a combination: Client Last Name, Client First Name, Birth Date, Gender, Status and County. Partial name search is allowed.

Status and county is disabled until other combination fields are entered.

3) Click the **Search** button after entering the client’s search identifiers.
7.2 Search Results: Client

Continue from the Search Client section.

When client is not found, a message appears on the top of the Search Client screen after the search is executed when client has no SAR issued to the provider in the user’s organization.

4) Search Results: Client section: displays the client list that matches the search criteria.

By default Search Client section will be expanded when user lands on the Client page.

5) To select client, once search results displays client(s), select the client by clicking on the client’s name hyperlink to navigate to the selected client to view SARs, Referrals, and Correspondence.

Or

6) To add eSAR for new client, click Add eSAR button.

Note: The Add eSAR button is disabled if the user does not have eSAR role.
Continued from Search Results – Client section.

URL link to Search Results for Selected Client webinar:
https://cmsprovider.cahwnet.gov/webinar/pedi/selectedclientdetail.mp4
(Follow Instruction from 4.2 section if video does not play)

This section assume that you already selected a client from the “Search Results – Client” section.

Once you select a client, system navigates you to the selected client search results with the following sections:

- Client Information
- List of Service Authorization Request,
- List of Referrals
- List of Correspondence
### Search Results for the selected Client

**SAR User Guide**

#### SAR Records - List of SARs

| SAR Number | Associated SARs | Name | ID | Type | Status | Relevance | Client | SAR Number | Associated SARs | Name | ID | Type | Status | Relevance |
|------------|----------------|------|----|------|--------|-----------|--------|------------|----------------|----------------|------|----|------|--------|-----------|
| 123456    |                | Smith | 123 | Corp | Active | High      | Corp   | 123456     |                |                |      |    |      |        |           |
| 789012    |                | Jones | 456 | Inc  | Active | Medium    | Inc    | 789012     |                |                |      |    |      |        |           |

#### SAR Records - List of Referrals

<table>
<thead>
<tr>
<th>Referral</th>
<th>Associated Referral</th>
<th>Name</th>
<th>ID</th>
<th>Type</th>
<th>Status</th>
<th>Relevance</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith</td>
<td></td>
<td>Corp</td>
<td>123</td>
<td>Corp</td>
<td>Active</td>
<td>High</td>
<td>2020-01-01</td>
</tr>
<tr>
<td>Jones</td>
<td></td>
<td>Inc</td>
<td>456</td>
<td>Inc</td>
<td>Active</td>
<td>Medium</td>
<td>2020-01-02</td>
</tr>
</tbody>
</table>

#### SAR Records - List of Correspondences

<table>
<thead>
<tr>
<th>Correspondence</th>
<th>Associated Correspondence</th>
<th>Name</th>
<th>ID</th>
<th>Type</th>
<th>Status</th>
<th>Relevance</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith</td>
<td></td>
<td>Corp</td>
<td>123</td>
<td>Corp</td>
<td>Active</td>
<td>High</td>
<td>2020-01-03</td>
</tr>
<tr>
<td>Jones</td>
<td></td>
<td>Inc</td>
<td>456</td>
<td>Inc</td>
<td>Active</td>
<td>Medium</td>
<td>2020-01-04</td>
</tr>
</tbody>
</table>

**Figure 8-2, List of Correspondence**
8.1 Client Information Section

Client Information section is consistent on all client related screen/sections.

Client Information section includes the following fields:

- Case Number
- Client Name
- Birth Date
- Gender
- Client Index Number (CIN)
- Client Status
- Aid Code
- County: Include County CCS phone number
- > More Information
- Alias
- Program Begin Date
- Program End Date
- MTU Name
- MTU Status
- Caseload Code
- Diagnostic Only
- Diagnoses: All available DX codes
### 8.2 Search Results – List of SARs

**Add eSAR button**: Takes user to the SAR Fillable Form for the selected client.
- Add eSAR button is enabled/disabled depending upon user’s eSAR privileges.

**SAR List will include**:
- Expand/collapse icon: Displays the SAR information.
- SAR Number: SAR Number hyperlink takes user to next screen to modify the SAR.
- Associated SAR: displays associated SARs. These are the deleted or processed SARs. User can expand/collapse (>) to view SAR details.
- Provider Name
- Provider ID
- Provider Type
- Status
- SAR County
- Service Begin Date
- Service End Date
- Print icon: Opens PDF of SAR for Authorized and Cancelled status. Disabled for Denied, Deleted, Awaiting Service Review, Pending, and Request Approval Y/N.

![Figure 8-4, Search Results – List of SARs](image)

<table>
<thead>
<tr>
<th>SAR Number</th>
<th>Associated SAR</th>
<th>Provider Name</th>
<th>Provider ID</th>
<th>Provider Type</th>
<th>Status</th>
<th>Review Status</th>
<th>SAR County</th>
<th>Service Begin Date</th>
<th>Service End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>8925756</td>
<td></td>
<td>Smith, Scott R MD</td>
<td>1699937706</td>
<td>PHYSICIAN</td>
<td>Awaiting Service Review</td>
<td></td>
<td>Sacramento</td>
<td>04/01/2020</td>
<td>04/11/2020</td>
</tr>
<tr>
<td>8925755</td>
<td></td>
<td>Smith, Scott R MD</td>
<td>1699937706</td>
<td>PHYSICIAN</td>
<td>Deleted</td>
<td></td>
<td>Sacramento</td>
<td>03/02/2020</td>
<td>03/06/2020</td>
</tr>
<tr>
<td>8925752</td>
<td></td>
<td>Antelope Valley Healthcare</td>
<td>1366419517</td>
<td>COMMUNITY HOSPITAL - INPATIENT</td>
<td>Awaiting Service Review</td>
<td></td>
<td>Sacramento</td>
<td>03/29/2020</td>
<td>03/03/2020</td>
</tr>
<tr>
<td>97087610890</td>
<td>(Deleted)</td>
<td>ANTELOPE VALLEY HEALTHCARE</td>
<td>1366419517</td>
<td>COMMUNITY HOSPITAL - INPATIENT</td>
<td>Authorized</td>
<td></td>
<td>Sacramento</td>
<td>02/27/2020</td>
<td>02/29/2020</td>
</tr>
<tr>
<td>97087610880</td>
<td></td>
<td>SMITH, SABRINA MD</td>
<td>1396765129</td>
<td>PHYSICIAN</td>
<td>Pending</td>
<td></td>
<td>Sacramento</td>
<td>02/18/2020</td>
<td>02/29/2020</td>
</tr>
<tr>
<td>8925754</td>
<td></td>
<td>SMITH, SARAH E DO</td>
<td>1518167857</td>
<td>PHYSICIAN</td>
<td>Cancelled</td>
<td></td>
<td>Sacramento</td>
<td>02/29/2020</td>
<td>02/29/2020</td>
</tr>
<tr>
<td>97087610860</td>
<td>(Processed)</td>
<td>ANTELOPE VALLEY HEALTHCARE</td>
<td>1366419517</td>
<td>COMMUNITY HOSPITAL - INPATIENT</td>
<td>Pending</td>
<td></td>
<td>Sacramento</td>
<td>02/24/2020</td>
<td>02/28/2020</td>
</tr>
<tr>
<td>97087610850</td>
<td></td>
<td>CASTLEVIEW HOSPITAL</td>
<td>1417064265</td>
<td>COMMUNITY HOSPITAL - INPATIENT</td>
<td>Authorized</td>
<td></td>
<td>Sacramento</td>
<td>02/24/2020</td>
<td>02/25/2020</td>
</tr>
<tr>
<td>8925659</td>
<td></td>
<td>Antelope Valley Healthcare</td>
<td>1366419517</td>
<td>COMMUNITY HOSPITAL - INPATIENT</td>
<td>Deleted</td>
<td></td>
<td>Sacramento</td>
<td>01/01/2020</td>
<td>01/31/2020</td>
</tr>
</tbody>
</table>
8.3 Search Results – List of Referrals

Provider organization: System displays the list of active case referrals that were submitted by the active NPI’s in that organization and for the selected client.

Managed Care Plan organization: System displays all the active case referrals that were submitted by the active Health Plans in that organization and fall within the date range when the selected client is enrolled with the health plan.

Search Results – List of Referrals includes the following columns:

- Referral Number
- Provider Name
- Provider Type
- Referral Status
- Referral Received Date
- Reason

Figure 8-5, Search Results – List of Referrals
8.4 Search Results – List of Correspondence

Search Results – List of Correspondence includes:

- County
- Referral Number
- SAR Number
- Correspondence Description
- Print Date
- Print icon: opens a pdf to print the correspondence

Type of correspondence that displays under the Search Results – List of Correspondence are:

Provider organization: Lists the below types of correspondence (in sent status) of all the SAR(s) which were created for the active NPI(s) in that selected organization and for the selected client.

- Medical Report Request: displays only when CMS Net user creates it from an eSAR case referral or from a SAR that is in Pending status or Authorized status.
- Inappropriate Referral Letter: a case referral rejected as inappropriate.
- Notice of Action: Service Authorizations
- Authorization cover letter
- SAR Cancellation/Denial letter
SAR User Guide

Managed Care Plan organization: Lists the below types of correspondence (in sent status) of all the related SAR(s)/Referral(s) which were created for the selected client during the enrollment period in the Health Plans within that selected organization.

- Inappropriate Referral Letter: a case referral rejected as inappropriate.
- Notice of Action: Service Authorizations
- Notice of Action: Case Management
- Notice of Action: Referral (Denial)
- Notice of Action: EPSDT
- SAR Cancellation/Denial letter
- Case denial and case closure letters
- Deferral Letter
- WCM – Application Letter
- WCM – Eligibility Letter
- WCM – SAR letter
This section only applies to Provider organization with eSAR ability.

The Add eSAR button is enabled for users the liaison marked as able to submit eSARs. See your liaison if the button is disabled and you wish to submit eSARs.

The SAR Fillable Form is used for new clients and for clients new to the provider in the user’s organization.

**New client in this manual is defined as:**

1. Client not yet known to CCS or GHPP.
   For example, new born baby that has no CIN or case number.

2. Client new to the provider in the user’s organization.
   For example, client that has a CIN or case number but not found in PEDI.
   Basically a client that is new to the provider.

One of the most common questions to the CMS Net Help Desk team is mentioned below:

- **Question:** County user provided PEDI user with client’s identifier; such as Case Number and CIN, but when PEDI user searched for the client, the client is not found. Why?

- **Answer:** When searching for a client, PEDI application only displays clients that have SAR(s) issued to the provider(s) in user’s organization.

  Therefore, no SAR issued to the user’s provider = no records found on search result.

The section below guides user on how to request eSARs for a new client.
9.1 Request new eSAR: New Client

To request SAR for a new client, follow the below steps:

URL link to Request eSAR for New Client webinar:
https://cmsprovider.cahwnet.gov/webinar/pedi/newclientesar.mp4

URL link to eSAR - Existing CCS or GHPP Client New to Provider webinar:
https://cmsprovider.cahwnet.gov/webinar/pedi/clientnewtoprovider.mp4

(Follow Instruction from 4.2 section if video does not play)

1) Click the Client icon to navigate to Search Client screen.

![Figure 9-1, Client Menu](https://example.com/client-menu.png)

2) On the Search Client page, scroll down and click on the Add eSAR button under the Search Result – Client section.

![Figure 9-2, Add SAR](https://example.com/add-sar.png)
3) System navigates user to the **SAR Fillable Form** page.

![SAR Fillable Form](image)

**Figure 9-3, SAR Fillable Form**
Trading Partner Information
This section displays the provider’s SAR Trading Partner and allows you to identify if the service request is for a CCS or GHPP client.

4) Complete the Trading Partner Information section.
   • When there is one trading partner, system defaults the trading partner.
   • When there are more than one trading partners, user must select the trading partner from the dropdown.

![Figure 9-4, Trading Partner Information](image)

CCS/GHPP Indicator: Required. Identify if client is CCS or GHPP.

Select from the drop down.

![Figure 9-5, CCS/GHPP Indicator](image)
5) Complete the Subscriber section.

![ Subscriber Form ]

**Figure 9-6, Subscriber**

Relationship to Client is required. Once selected, enter the subscriber’s name and address.

Relationship, Name, Address1, and Zip Code are required fields.

Select the relationship to client from the dropdown list.

- The *Last Name or Name* is required field. Based on relationship to client, *First Name*, *Middle Name or Initial*, and *Name Suffix* fields are enabled.

- When relationship to client is *Mother*, additional fields Maiden Name, Date of Birth, Gender, Medi–Cal Number, CIN, and SSN are enabled.
Dependent

Note: For GHPP clients, when the Relationship to Patient is selected as “Self”, the Dependent section is disabled and collapsed.

6) Complete the Dependent section.

![Dependent section screenshot](image)

Figure 9-7, Dependent

The client's name, birth date, gender and address are required.

For known CCS or GHPP client, enter the client Client Index Number (CIN) in the Client Index Number field.
Enter **00** in the *Client Index Number* field when CIN is not known.

When *Client Index Number* field is **00**, you may do one of the following to link the eSAR to a client found in CMS Net.

- Enter **00** in *Client Index Number* field with client case number in the *Case Number* field. 
  Or
- Enter **00** in *Client Index Number* field and client referral number in the *Referral Number* field. 
  Or
- Enter **00** in *Client Index Number* field and client social security number (SSN) in the *Social Security Number* field. 
  Or
- Enter **00** in *Client Index Number* field and enter the client’s *EXACT NAME*.

**Important Notes:**

When you enter **00** in *Client Index Number* field, the system does an *EXACT NAME match* with birth date and gender when it finds no entries in the following fields: *Case Number*, *Referral Number*, and *Social Security Number*.

- Therefore, if the name you entered does not 100% match with name found in CMS Net, the system creates a new client.
- When a new client record is created and there is already an existing client in CMS Net, currently, there is no ability to merge or transfer the PEDI eSAR to the correct client.
- Therefore, the County user will reject your request(s).
- The County user should provide you with the client’s CIN or case number. You can use this info and re-submit your request using the SAR Fillable Form.
Additional Information

7) Complete the Additional Information section.

![Additional Information](image)

The **Case Number** and **Referral Number** are optional fields.

When **00** is entered on **Client Index Number** field, Case Number and Referral Number fields when entered is used to identify the client in CMS Net as mentioned in the above Dependent section.

Enter information for the following optional fields when known: Language, Medical Record Number, Primary Care Physician, and Primary Care Physician Telephone, Insurance Type, Insurance Name, and Insurance Policy Number.
Service Provider or Organization

8) Complete the Service Provider or Organization section.

The following are required: Provider Classification, Identifier, and Service Provider or Organization Name.

Provider Classification: Select the classification for the provider: Medical, Dental, and Special Care Center.

You can either enter the Identifier or Service Provider or Organization Name.

- Identifier: search for provider by entering NPI or SCC number, then execute search by pressing enter key or tap out of field.
- Service Provider or Organization Name: search for provider by entering provider’s name, then execute search by pressing enter key or tap out of field.

Note: Only providers in your organization will be found on the search.
9) Complete the Service Request section.

![Service Request](image)

**Figure 9-10, Service Request**

The service begin and service end dates are required for all SARs.

**Proposed or Actual Service Begin Date**: enter the service begin date.

**Proposed or Actual Service End Date**: enter the service end date.

**Number of Days**:
- For **outpatient** requests, this field auto calculates as the difference between service dates. Leave this field blank.
- For **inpatient** requests, the user enters number of days in this field. Enter the number of days into this field.

**Diagnosis 1 and Diagnosis 2**: enter the diagnostic code or diagnostic description into the field.

**EPSDT**: this is an optional checkbox field for EPSDT request. This field is display only for existing SARs.
10) Complete the **Service Code Information** section.

**Figure 9-11, Service Code Information**

Service Code Information section is enabled once a provider is added from the *Service Provider or Organization* section.

Procedure Code or Description: enter the procedure code or description and press Enter key to search. The system filters code based on the provider.

An overlay appears when more than one result is found for the procedure code.

**Figure 9-12, Service Code Overlay**

On the *Procedure Code* overlay, select the code(s) and click X or press Esc key to close the overlay.

Selected code(s) appear below the *Procedure Code or Description* field.
The procedure code’s units is required.

Units: Enter the units for the procedure code.

Select code modifier and quantity when applicable to procedure code.

Click X to remove unwanted code(s).

FYI: Service Code Grouping are below. You can type the code or description and system will populate the code onto the screen. Example: you can type 01 for Physician or type “Physician” in the Procedure Code or Description field.

<table>
<thead>
<tr>
<th>Procedure Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>PHYSICIAN</td>
</tr>
<tr>
<td>02</td>
<td>SPECIAL CARE CENTER</td>
</tr>
<tr>
<td>03</td>
<td>TRANSPLANT CENTERS</td>
</tr>
<tr>
<td>04</td>
<td>COMMUNICATION DISORDER CENTERS</td>
</tr>
<tr>
<td>05</td>
<td>AUDIOLOGICAL DIAGNOSTIC/TREATMENT SERVICES</td>
</tr>
<tr>
<td>06</td>
<td>HIGH RISK INFANT FOLLOW UP</td>
</tr>
<tr>
<td>07</td>
<td>ORTHOPEDIC</td>
</tr>
<tr>
<td>08</td>
<td>RURAL HEALTH CLINICS AND FEDERALLY QUALIFIED HEALTH CENTERS</td>
</tr>
<tr>
<td>09</td>
<td>CHRONIC DIALYSIS CLINIC</td>
</tr>
<tr>
<td>10</td>
<td>OPHTHALMOLOGY</td>
</tr>
<tr>
<td>11</td>
<td>MEDICAL THERAPY</td>
</tr>
<tr>
<td>12</td>
<td>PODIATRY</td>
</tr>
</tbody>
</table>
11) Complete the **Contact Information** section.

System populates the logged in PEDI user’s name, telephone, and email into the Contact Information section.

The county/state staff use this contact information to contact the SAR requestor if he/she has questions about the SAR request.

- The default information is editable.

**Freeform Message Text:**

- This is a message textbox for SAR requestor to enter comments about the SAR request.
- The maximum characters allowed for all fields in the Contact Information section (contact person’s name, telephone, email, and message text) is 230 characters. Once the maximum characters has been reached the system will stop the user.
- Only punctuation characters allowed are space, period, comma, dash, and apostrophe.
Attachments

12) Complete the Attachments section to add attachment(s).

Click the + to expand/open the Attachments section.

Click Upload button to select an attachment.

Note: Only PDF, JPG, and TIF/TIFF files can be uploaded.
Once an attachment is selected, it appears on the right side of the Attachments section.

The attachment is auto selected upon appearing on the screen for you to add the attachment report type.

Select Attachment Report Type Code: select the attachment report type(s) that apply to the attachment. Click *Show More* button to see all attachment report types.

The report type selected appears on the attachment. Uncheck the report type to remove it from the attachment.
When you are finished with the SAR Fillable Form, click Submit button to submit the service request.

Figure 9-17, Attachment Report Type

Figure 9-18, Success Message
9.2 Request new eSAR: Established Client

Users may request for a Service Authorization Request (SAR) for a GHPP and CCS client registered in the CMS Net application and found in PEDI search result.

URL link to Request eSAR for Established Client webinar:
https://cmsprovider.cahwnet.gov/webinar/pedi/existingclientesar.mp4

(Follow Instruction from 4.2 section if video does not play)

**Search and Select Client ➔ Click Add eSAR**

To request an eSAR for an established CCS/GHPP client found on your search result, do the following steps.

1) From the Search Client screen, search for your client. The search result displays client under Search Results – Client section.

2) On the client’s information row, click on the 📋 icon to navigate directly to the new SAR Fillable Form for that client.

![SAR Fillable Form](image)

**Figure 9-19, Search Results - Client**

Or

Click on the client’s name hyperlink to select client and navigate to the Search Results – List of SARs.

3) Under the Search Results – List of SARs section, click Add eSAR button.
### SAR User Guide

#### Client Information

<table>
<thead>
<tr>
<th>Case Number</th>
<th>Client Name</th>
<th>Date of Birth</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>12558160</td>
<td>Hugs, Kisses</td>
<td>12/02/2019</td>
<td>Female</td>
</tr>
<tr>
<td>CIN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>35602815A4</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Search Results - List of SARs

- **Add eSAR**
- Display: 50 (Range 1-1000) records per page
- Filter the records: 

<table>
<thead>
<tr>
<th>SAR Number</th>
<th>Associated SAR</th>
<th>Provider Name</th>
<th>Provider ID</th>
<th>Provider Type</th>
<th>Status</th>
<th>Review Status</th>
<th>SAR County</th>
</tr>
</thead>
<tbody>
<tr>
<td>97087610890</td>
<td></td>
<td>ANTELOPE VALLEY HEALTHCARE</td>
<td>1368419517</td>
<td>COMMUNITY HOSPITAL - INPATIENT</td>
<td>Authorized</td>
<td></td>
<td>Sacramento</td>
</tr>
<tr>
<td>8925691</td>
<td></td>
<td></td>
<td>1396765129</td>
<td>PHYSICIAN</td>
<td>Pending</td>
<td></td>
<td>Sacramento</td>
</tr>
<tr>
<td>97087610880</td>
<td></td>
<td>SMITH, SABRINA MD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Sacramento</td>
</tr>
</tbody>
</table>

**Figure 9-20, Add eSAR**
The system navigates user to the SAR Fillable Form.

4) Complete the fillable form to submit your SAR request.

![SAR Fillable Form: Trading Partner & Client Information](image)

Figure 9-21, SAR Fillable Form
Trading Partner and CCS/GHPP Indicator and client is defaulted on the form and the Client Information section displays the client’s details.

![Client Information](image)

**Figure 9-22, Client Information**
**Subscriber and Dependent**

Complete this section on when necessary.

User needs to expand the Subscriber and Dependent section to add address when subscriber or dependent has a change of address or client’s County displayed in Client Information section is not the client’s current County.

Subscriber is the guardian and dependent is the client.

---

**Figure 9-23, Dependent**

5) Complete the **Dependent** section when the client’s address has changed.

For certain scenarios, SAR will be sent to the county based on the **dependent address** entered.

The client’s address determines the SAR county when the following scenario occurs:

a. **Client’s case status** is either **Closed**, **Denied**, or **Not Open** and SAR request needs to be sent to client’s new county.
   - You can view the **client’s CURRENT COUNTY** by viewing the **County** from the Client Information section.
   - When address is not entered, the default SAR county will be the county shown in the Client Information section.

b. The client has a change of address and you want to send the new address to county/state. When address is entered, the address appears on CMS Net Case Note module.
5) Complete the **Service Provider or Organization** section.

The following are required: **Provider Classification**, **Identifier**, and **Service Provider or Organization Name**.

Provider Classification: Select the classification for the provider: Medical, Dental, and Special Care Center.

You can either enter the Identifier or Service Provider or Organization Name.

- **Identifier**: search for provider by entering NPI or SCC number, then execute search by pressing enter key or tap out of field.
- **Service Provider or Organization Name**: search for provider by entering provider’s name, then execute search by pressing enter key or tap out of field.

Note: Only providers in your organization will be found on the search.
6) Complete the **Service Request** section.

![Figure 9-25, Service Request](image)

The service begin and service end dates are required for all SAR type.

- **Proposed or Actual Service Begin Date**: enter the service begin date.

- **Proposed or Actual Service End Date**: enter the service end date.

**Number of Days**:

- For **outpatient requests**, this field auto calculates as the difference between service dates. Leave this field blank.
- For **inpatient requests**, the user enters number of days in this field. Enter the number of days into this field.

**Diagnosis 1 and Diagnosis 2**: enter the diagnostic code or diagnostic description into the field.

**EPSDT**: this is an optional checkbox field for EPSDT request. This field is display only for existing SARs.
**Service Code Information**

7) Complete the **Service Code Information** section.

![Service Code Information](image)

**Figure 9-26, Service Code Information**

Service Code Information section is enabled once a provider is added from the **Service Provider or Organization** section.

Procedure Code or Description: Enter the procedure code or description and press the Enter key to search. The system filters code based on the provider’s type.

An overlay appears when more than one result is found for the procedure code.

![Service Code Overlay](image)

**Figure 9-27, Service Code Overlay**

On the **Procedure Code** overlay, select the code(s) and click X or press Esc key to close the overlay.

Selected code(s) appear below the **Procedure Code or Description** field.
The procedure code's units is required.

Units: Enter the units for the procedure code.

Select code modifier and quantity when applicable to procedure code.

Click \( \times \) to remove unwanted code(s).

FYI: Service Code Grouping are below. You can type the code or description and system will populate the code onto the screen. Example: you can type 01 for Physician or type “Physician” in the Procedure Code or Description field.

<table>
<thead>
<tr>
<th>Procedure Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>PHYSICIAN</td>
</tr>
<tr>
<td>02</td>
<td>SPECIAL CARE CENTER</td>
</tr>
<tr>
<td>03</td>
<td>TRANSPLANT CENTERS</td>
</tr>
<tr>
<td>04</td>
<td>COMMUNICATION DISORDER CENTERS</td>
</tr>
<tr>
<td>05</td>
<td>AUDIOLOGICAL DIAGNOSTIC/TREATMENT SERVICES</td>
</tr>
<tr>
<td>06</td>
<td>HIGH RISK INFANT FOLLOW UP</td>
</tr>
<tr>
<td>07</td>
<td>ORTHOPEDIC</td>
</tr>
<tr>
<td>08</td>
<td>RURAL HEALTH CLINICS AND FEDERALLY QUALIFIED HEALTH CENTERS</td>
</tr>
<tr>
<td>09</td>
<td>CHRONIC DIALYSIS CLINIC</td>
</tr>
<tr>
<td>10</td>
<td>OPHTHALMOLOGY</td>
</tr>
<tr>
<td>11</td>
<td>MEDICAL THERAPY</td>
</tr>
<tr>
<td>12</td>
<td>PODIATRY</td>
</tr>
</tbody>
</table>
8) Complete the **Contact Information** section.

![Contact Information](image)

**Figure 9-29, Contact Information**

System populates the logged in PEDI user’s name, telephone, and email into the Contact Information section.

The county/state staff use this contact information to contact the SAR requestor if he/she has questions about the SAR request.

- The default information is editable.

**Freeform Message Text:**

- This is a message textbox for the SAR requestor to enter comments about the SAR request.
- The maximum characters allowed for all fields in the Contact Information section (contact person’s name, telephone, and email and message text) is 230 characters. Once the maximum characters has been reached the system will stop the user.
- Only punctuation characters allowed are space, period, comma, dash, and apostrophe.
9) Complete the Attachments section to add attachment(s).

Click the + to expand/open the Attachments sections.

Click **Upload** button to select an attachment.

Note: Only PDF, JPG, and TIF/TIFF files can be uploaded.
SAR User Guide

Once attachment is selected, it appears on the right side of the Attachments section.

The attachment is auto selected upon appearing on the screen for you to add the attachment report type.

Select Attachment Report Type Code: select the attachment report type(s) that apply to the attachment. Click *Show More* button to see all attachment report types.

The report type selected appears on the attachment. Uncheck the report type to remove it from the attachment when added in error.
When you are finished with the SAR Fillable Form, click Submit button to submit service request.

Figure 9-33, Success Message
9.3 SAR Modification Request

This section shows you how to request a SAR modification to an existing SAR.

URL link to Modify SAR webinar: https://cmsprovider.cahwnet.gov/webinar/pedi/modifysar.mp4

(Follow Instruction from 4.2 section if video does not play)

**Note:** Users may not request modification to a Cancelled, Denied or Deleted SAR.

Users may request for a SAR modification to an existing request with an eSAR temporary number (ex: 7793645) in Awaiting Service Request or to an 11 digit SAR in Pending status or Authorized status.

Note that if you modify an eSAR, the system will always auto delete the prior eSAR to replace with new eSAR.

**Search Client**

1) Search and select the client you need to do a SAR modification for.

When a SAR is modifiable, the SAR number under the SAR Number column is blue and has a hyperlink.

![SAR Number Column](figure934.png)

**Figure 9-34, SAR Number Column**

SAR modification is very simple. You may modify any SAR that is not over 3 years.

**Note:** Modification to an eSAR (temporary number) will replace the existing eSAR with a new eSAR.
2) To modify a SAR, click on the SAR number hyperlink of the SAR you want to modify.

Figure 9-35, SAR Number - Hyperlink
3) System will take you to the selected SAR. Enter your modification request on the fillable form.

![Figure 9-36, SAR Fillable Form]
The following sections are editable: Subscriber, Dependent, Service Provider or Organization, Service Request, Service Code Information, Contact Information, and Attachments.

**Subscriber and Dependent sections**

4) System allows you to add the subscriber or dependent address. Fields input are sent over to the client's case note in CMS Net.

![Figure 9-37, Subscriber or Dependent](image)

During SAR modification, client's SAR County does not change as the SAR County has already been determined with the original SAR.
Service Provider or Organization
5) You may edit the provider’s address and telephone number to the correct address/telephone number when necessary. The update is only for the SAR you are modifying. It does not permanently change the provider’s address.

Figure 9-38, Service Provider or Organization
6) The **Proposed or Actual Service Date Begin** and **Proposed or Actual Service Date End** fields are editable.

The **Proposed or Actual Service Date Begin** can only be retro (moved back).

The **Proposed or Actual Service Date End** can only be extended (moved forward).

The **Diagnosis 1** and **Diagnosis 2** may also be edited.

**Note:** All edit/changes on the modification are “proposed” changes on the Awaiting Service Review request. The CMS Net user reviews and accepts or rejects each proposed change.
Service Code Information

7) You can add additional procedure codes.

Procedure Code or Description: Enter the procedure code or description and press the Enter key to search. The system filters code based on the provider’s type.

An overlay appears when more than one result is found for the procedure code.

On the Procedure Code overlay, select the code(s) and click X or press Esc key to close the overlay.

Selected code(s) appear below the Procedure Code or Description field.

The procedure code’s units is required.
Units: Enter the units for the procedure code.

Select code modifier and quantity when applicable to procedure code.

Click to remove unwanted code(s).

FYI: Service Code Grouping are below. You can type the code or description and system will populate the code onto the screen. Example: you can type 01 for Physician or type “Physician” in the Procedure Code or Description field.

**Procedure Code:**  **Description:**

01   PHYSICIAN
02   SPECIAL CARE CENTER
03   TRANSPLANT CENTERS
04   COMMUNICATION DISORDER CENTERS
05   AUDIOLOGICAL DIAGNOSTIC/TREATMENT SERVICES
06   HIGH RISK INFANT FOLLOW UP
07   ORTHOPEDIC
08   RURAL HEALTH CLINICS AND FEDERALLY QUALIFIED HEALTH CENTERS
09   CHRONIC DIALYSIS CLINIC
10   OPHTHALMOLOGY
11   MEDICAL THERAPY
12   PODIATRY
8) System defaults the contact information to the user logged in but you may edit the information if the person CMS Net user should contact is not you.
Attachments

9) You can add, remove, or modify an existing attachment.

Click the + to expand the Attachments section.

When you add an attachment, the system auto selects the attachment for you to add the report type.

To modify the report type, click on the radio button of the attachment you want to modify to select it. Use the checkboxes to add or remove the attachment report types for each attachment.

To remove an attachment, click on the \( \times \) to remove the attachment.

Figure 9-42, Attachments
Submit
10) Click the Submit button to save and submit your request.

Figure 9-43, Submit – Success Message
9.4 SAR Duplicate Check

During new eSAR creation, system informs PEDI user of any duplicate SAR(s) found with the ability for PEDI user to navigate to the duplicate SAR to make updates or to continue to create a new eSAR request.

URL link to Duplicate SAR Check webinar:
https://cmsprovider.cahwnet.gov/webinar/pedi/duplicatesarcheck.mp4
(Follow Instruction from 4.2 section if video does not play)

System does a SAR duplicate check for the following SAR statuses: Pending, Authorized, and Awaiting Service Review.

The fields the system used to check for duplicate SAR are:

- Organization
- Client
- CCS/GHPP
- EPSDT
- Service Begin Date
- Service End Date
- No. of days
- Primary Dx
- Secondary Dx
- Provider NPI
- Provider Name
- Provider Type
- Provider Address (Addr Line 1, Addr Line 2, City, State, Zip)
How the Duplicate Check Works

System displays an overlay displaying SAR list that matches the duplicate check fields with the service code(s).

Click on the SAR number hyperlink to navigate to the selected SAR (to make modification). Note that your current eSAR entry will not be saved.

Or

Click "Continue" button to create new eSAR request. System will provide you the Temporary SAR Number.
9.5 Attachments

You may add/update/delete attachment(s) from the SAR Fillable Form page or by expanding a SAR from the Search Results: List of SARs.

URL link to SAR Attachments webinar:
https://cmsprovider.cahwnet.gov/webinar/pedi/sarattachments.mp4

(Follow Instruction from 4.2 section if video does not play)

The Attachments section is at the bottom of the screen. The steps to add/update/remove attachments on the SAR Fillable form and List of SARs screen is the same.
Figure 9-46, SAR Fillable Form - Attachments

Search Results: List of SARs (Click >) SAR Number:
Figure 9-47, Search Results: List of SARs (Click >) SAR Number
Add Attachments

1) Click the + to expand the Attachments section.

![Figure 9-48, Attachments +]

2) Click Upload button to select an attachment.

![Figure 9-49, Attachments - Upload]

3) Once attachment is selected, it appears on the right side of the Attachments section.
4) The attachment is auto selected upon appearing on the screen for you to add the attachment report type.

![Figure 9-50, Attachments – Add Attachment Report Type]
5) Select the attachment report type(s) that applies to the attachment under the Select Attachment Report Type Code section.

Figure 9-51, Attachments – Attachment Report Type Check Box
6. Click **Show More** button to see all attachment report types.

7. The report type selected appears on the attachment. Uncheck the report type to remove it from the attachment when added in error.
** Modify Attachments  

8. To modify the report type, click on the radio button of the attachment you want to modify to select it. Uncheck the attachment report type to unselect it or check an attachment report type to add another type.

![Modify Attachments](image)

*Figure 9-53, Modify Attachments*
9. To remove an attachment, simply click on the × to remove the attachment.

Figure 9-54, Remove Attachments
9.6 View SAR Rejection Message

When viewing a deleted SAR, the rejected/deleted reason(s) displays under the Rejection Details section.

URL link to Deletion/Rejection of eSAR webinar:
https://cmsprovider.cahwnet.gov/webinar/pedi/esardeletionrejection.mp4

(Follow Instruction from 4.2 section if video does not play)

Note: The Rejection Details section is visible for deleted eSARs. If the SAR did not originate as an eSAR, this section does not appear on screen.

- **Rejection Details section**: Displays the eSAR transactions reason(s) that the CMS Net user selected at the time of rejecting the eSAR request.

- **User Rejection Text**: Displays the CMS Net user’s free text comments.

To view the rejected eSAR, click on the > arrow to expand the SAR information.

![Figure 9-55, eSAR Rejection Details](image-url)
10.1 How eSAR is assigned to Client’s County: CCS & GHPP

Determining which CCS County the eSAR request belongs to depends on the following:

- CMS Indicator
- SAR number
- Identifier matches
- Client eligibility period
- Case referral
- Status
- Zip code

CMS Indicator:
If indicator on Fillable Form is CCS, the request defaults to CCS program.
If indicator is GHPP, client belongs to GHPP. The request is assigned as GHPP.

Identifiers check: System performs a search for an existing CCS client based on the following identifiers.

- Identifier matches
  - CMS Net will attempt to match an eSAR to an existing case based on the combinations below.

  If no match is found for the first combination, the system will attempt to match on the second combination, etc.

  If there is no match found, the system will create a new case referral for the eSAR.

- Identifier Combinations:
  1. CIN and Date of Birth
  2. Case# or Date of Birth Date
  3. Referral Tracking Number and Birth Date
  4. SSN and Date of Birth
  5. Client’s EXACT Name, Birth Date, & Gender
  6. Client’s EXACT Name, Date of Birth, Mom’s SSN/Medi–Cal #

- (CCS) If no match found, system does a zip code check.
  - Request is determined to be a new case referral to the zip code county.
- (CCS) If match found, system will check if a client eligibility period exists and place the client in the appropriate county based on the eSAR service dates.
10.2 eSAR Request Assigned to Incorrect or Another County

*Important*

eSAR for client may get assigned to incorrect/another county for the following scenarios/reasons:

1. Client case status is Closed/Not Open/Denied and client moved to a new county.
   - The eSAR Fillable Form for established client currently does not have client address fields. Therefore, it will get assigned to the current county at the time the case was made Closed/Not Open/Denied.
   - If you know client is no longer with the current county, enter the client’s address on the eSAR Fillable Form by expanding the “Dependent” section.
   - If the Date of Service is after the case closure or denial, the system will send the eSAR request to the county of the zip code you entered.

2. Client moved several times and date of service on your request belongs to a prior county.
   - When eSAR is transmitted to CMS Net application, system performs a client eligibility date check. When date of service on eSAR request is found, system puts referral to the county of eligibility where service begin date falls.

⚠️ CMS Net staff (county/state) DOES HAVE the ability to ‘switch/forward’ eSAR to the correct county. If request is sent to the incorrect county, you may request for eSAR request to be forwarded.
11 WHAT IS AN eSAR/eSAR ROLE

11.1 What is an eSAR?
eSAR is an electronic Service Authorization Request (eSAR). Provider Electronic Data Interchange (PEDI) users with eSAR form role may request service requests via the online SAR Fillable Form to send directly to CMS Net system.

Once eSAR is submitted successfully from PEDI, it becomes an “Awaiting Service Review” request waiting for county/state staff to review to accept or reject.

11.1.1 eSAR Role
In order for a user to submit eSAR via PEDI, the user must have the eSAR role.

Liaisons may request to submit eSAR via PEDI by applying for an eSAR Trading Partner. See the “PEDI Liaison Manual” for instructions on how organization liaisons may request for a Trading Partner and assign eSAR role to PEDI staff once the Trading Partner is approved.

*Note: eSAR Fillable Form is only available to Provider type organizations.*

11.1.2 Do you have an eSAR role?
If you are not sure if you have eSAR role or not, go to Search Client screen and scroll down to Search Results – Client section.

1) If the Add eSAR button is disabled, you do not have the eSAR role.

![Figure 11-1, Add eSAR - Disabled](image)

Either your liaison did not give you the eSAR role or your organization does not have an eSAR Trading Partner. Check with your liaison for the role.

2) If you have eSAR role, the Add eSAR button is enabled.

![Figure 11-2, Add eSAR - Enabled](image)