Provider Electronic Data Interchange (PEDI)

SAR User Guide

Revised 12/15/2023

AMENDMENTS

<table>
<tr><th>Amendment</th><th>Description</th><th>Date</th></tr>
<tr><td>1.0</td><td>Created by Molly P. for the new PEDI (Release 88)</td><td>2020–03–11</td></tr>
<tr><td>2.0</td><td>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.</td><td>2020–03–30</td></tr>
<tr><td>3.0</td><td>Updated by Molly P.
The changes below are effective June 12, 2020:
Updated 6.5 SAR Denial Letter – How to View/Print
• User may print SAR Denial Letter directly from Search Results – List of SARs:
• The Print icon is enable for Denied SAR NOA and SAR deferral/cancellation letter from the Search Results – List of SARs by clicking on the Print icon on the SAR denial.
Updated 8.2 Search Results – List of SARs
• Updated screen shot for Search Results – List of SARs due to added the SAR Last Updated Date and timestamp to the Search Results – List of SARs.
Updated 9.1 Request new eSAR: New Client
• Subscriber section: Medi-Cal Number is renamed to be “Medi-Cal Number / Benefits Identification Card ID Number”.
Dependent section: Effective June 12, 2020, an enhancement was added to auto input the 00 for CIN if user forgets.</td><td>2020-06-08</td></tr>
</table>

Amendment	Description	Date
4.0	Updated by La Dosha W. The changes below are effective September 27, 2021: Updated 6.2- Search Results- List of SARs • Figure 6-4, Search Results – List of SARs Update 6.3 View SAR Details • Figure 6-5, View SAR Details Updated 6.7 SAR Review Status • Figure 6-12, SAR Review Status Updated 8 - Search Results – For the selected client • Figure 8-2, Search Results- Client Updated 8.2 Search Results- List of SARs • Figure 8-4, Search Results- List of SARs • Updated SAR List will include: ○ Case Number ○ Added Case Status ○ Added Client Name Updated Subscriber and Dependent Figure 9-23, Dependent	2021-09-17
5.0	Updated by Molly P. 1) Added “Important Notes” to below section: • 7.2 Search Results: Client for when searching for known CCS/GHPP client. 2) Added the below sub-sections to main section 8.2 Search Results – List of SARs • How to View Rejection Details on SAR • How to View Return Request Reason on SAR and View Referral Letter Updated by Brenda W. 3) Added Urgent field to 9.1, 9.2, and 9.3 Service Request sections.	2023-12-11

TABLE OF CONTENTS

LIST OF FIGURES

1 DEFINITIONS, ABBREVIATIONS, & ACRONYMS

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

Term	Definition
CCS	California Children's Services
CIN	Client Identification Number
CMS	Children's Medical Services
CMS Net	CMS Case Management System
CMS Net Web	CMS Case Management System: Web Application
DHCS	Department of Health Care Services
eSAR	Electronic Service Authorization Request
EPSDT	Early and Periodic Screening, Diagnosis, and Treatment
GHPP	Genetically Handicapped Persons Program
HCP or HP	Health Care Plan
ICD	Int'l Classification of Diseases (Diagnosis/Procedure Code)
ISCD	Integrated Systems of Care Division
IE	Internet Explorer (Microsoft web browser)
Inappropriate Letter	A letter sent to the Provider/Managed Care Plan/HF informing them the referral is incomplete, inaccurate or needs more clarification.
JPG	Joint Photographic Experts Group
MCP	Managed Care Plan
PEDI	Provider Electronic Data Interchange
PMF	Provider Master File (Medi-Cal Provider list)
NOA	Notice of Action
NPI	National Provider Identifier
PDF	Portable Document Format
PSSN	Pseudo Social Security Number
Requestor	Any referral source other than a provider listed in the PMF (Non–PMF provider)
SAR	Service Authorization Request
SCC	Special Care Center
SCG	Service Code Groupings
SSN	Social Security Number
TIF, TIFF	Tagged Image File Format
TP	Trading Partner

2 INTRODUCTION

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 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 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

   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 PEDI: LANDING PAGE (HOME)

5.1 Landing Page (Home)

When you successfully logon to PEDI, the system defaults you to the landing page (Home Page).

Menu

Figure 5-1, 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 prefereneces, 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 orgaization to perform laison 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.

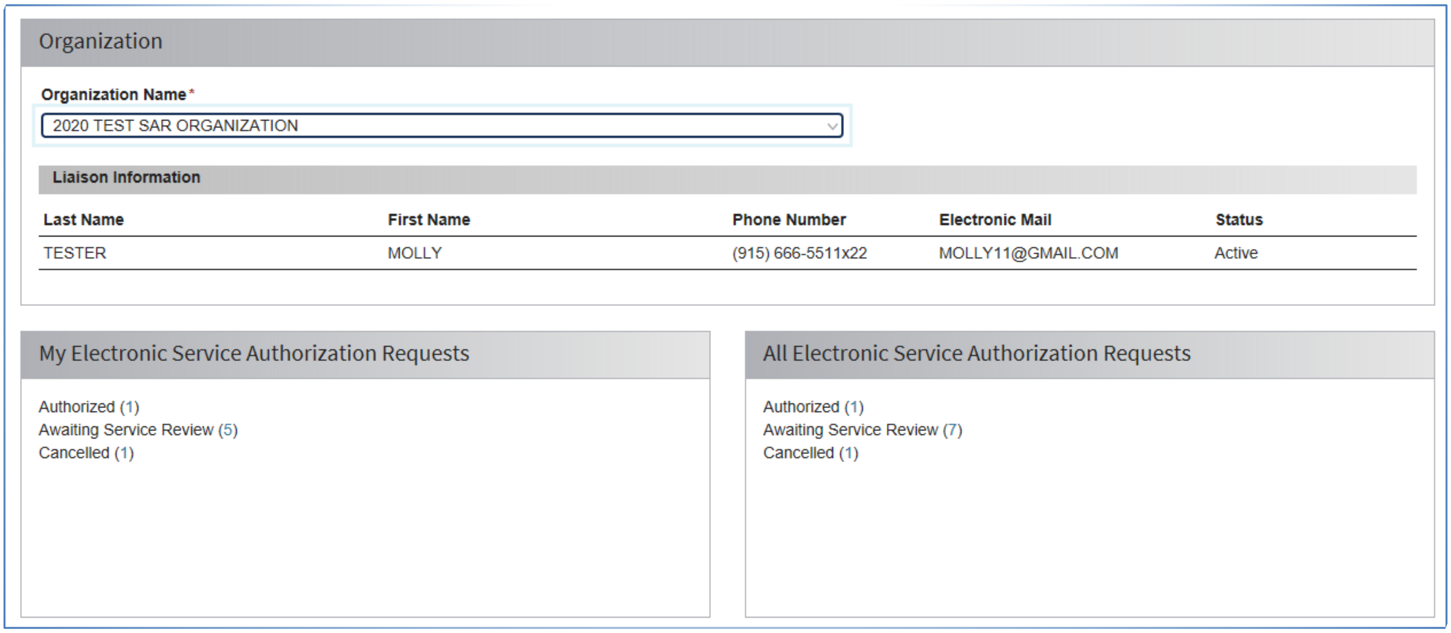


Figure 5-2, Landing Page

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 SAR - SEARCH SAR

6.1 Search 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

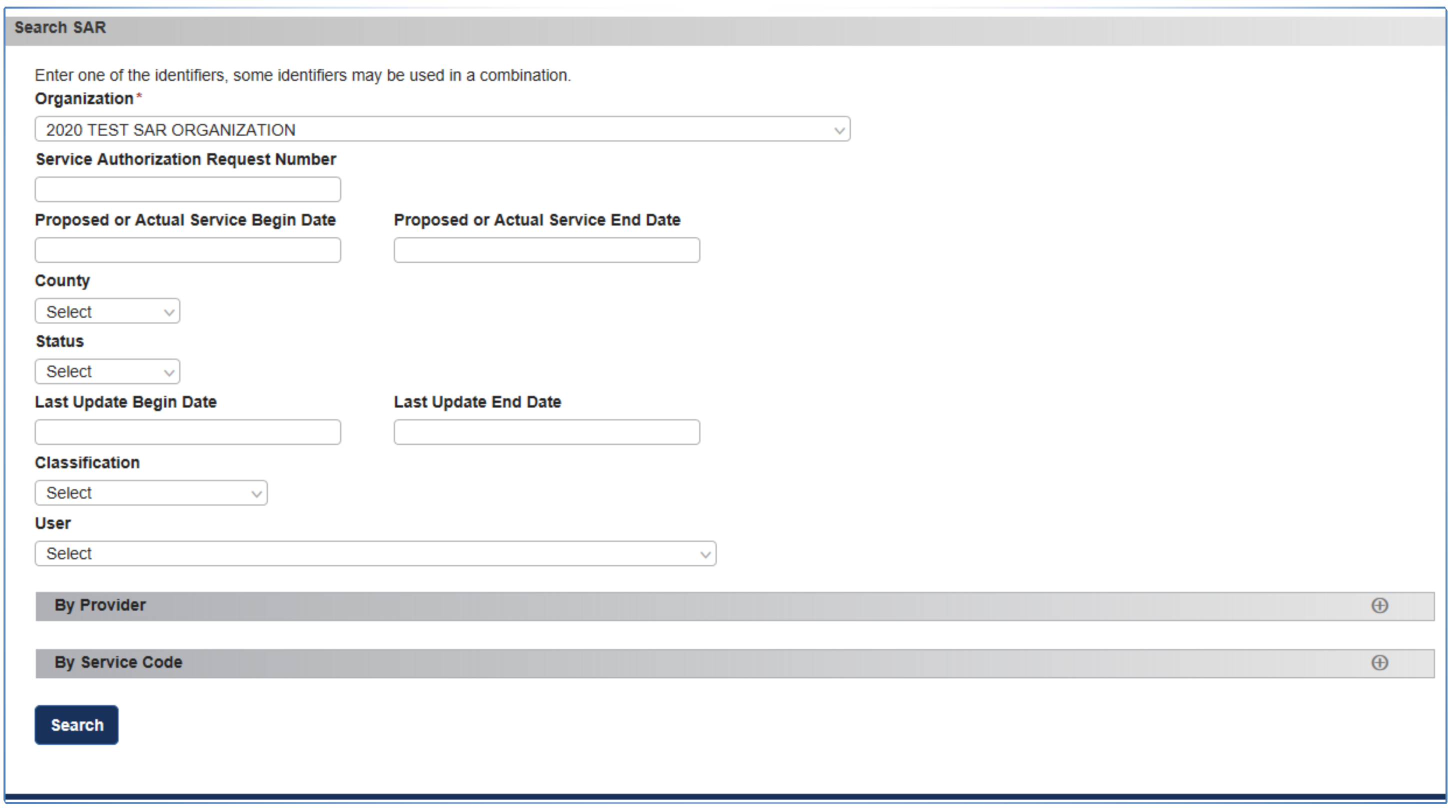


Figure 6-1, SAR

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.

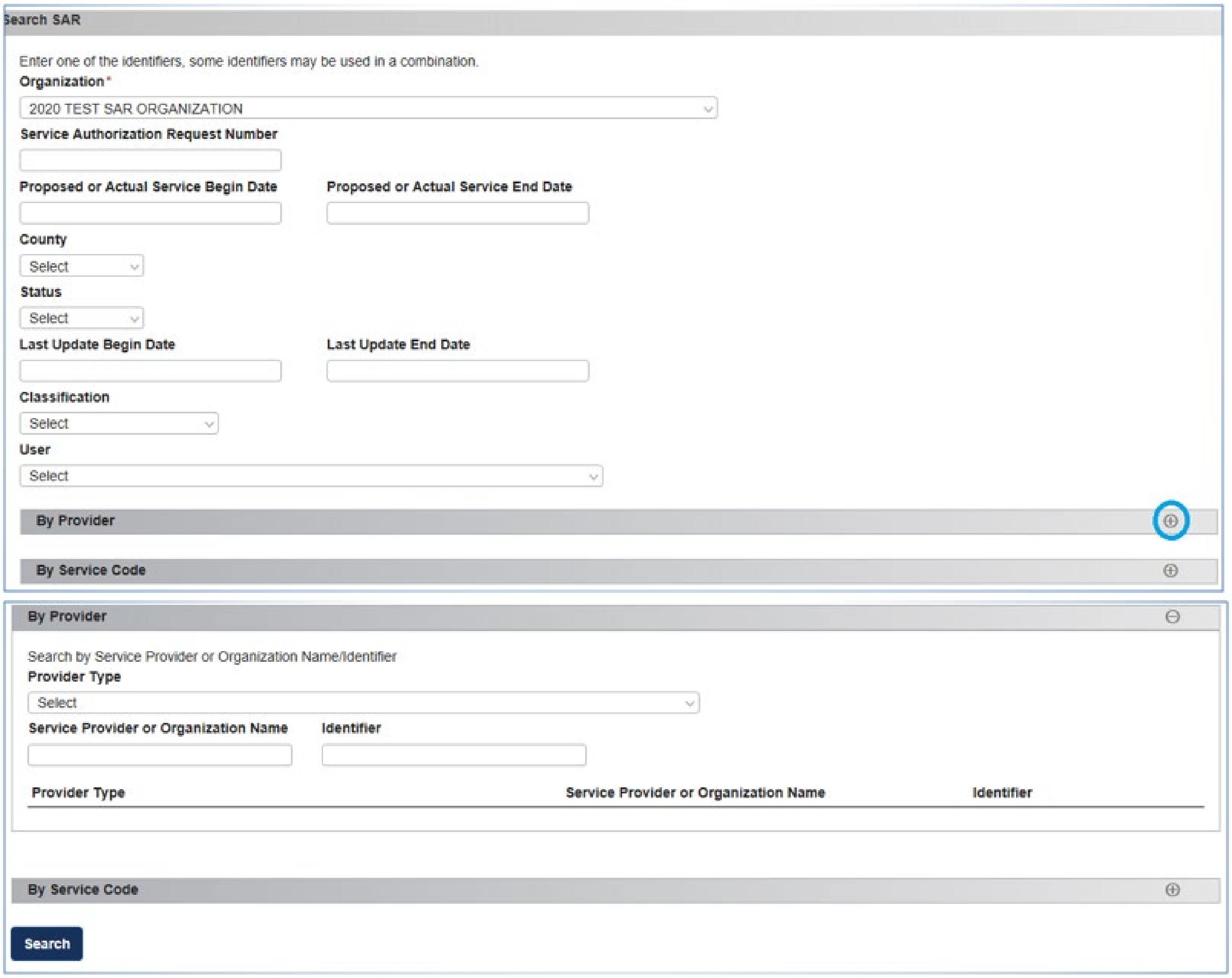


Figure 6-2, Search SAR – By Provider

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.

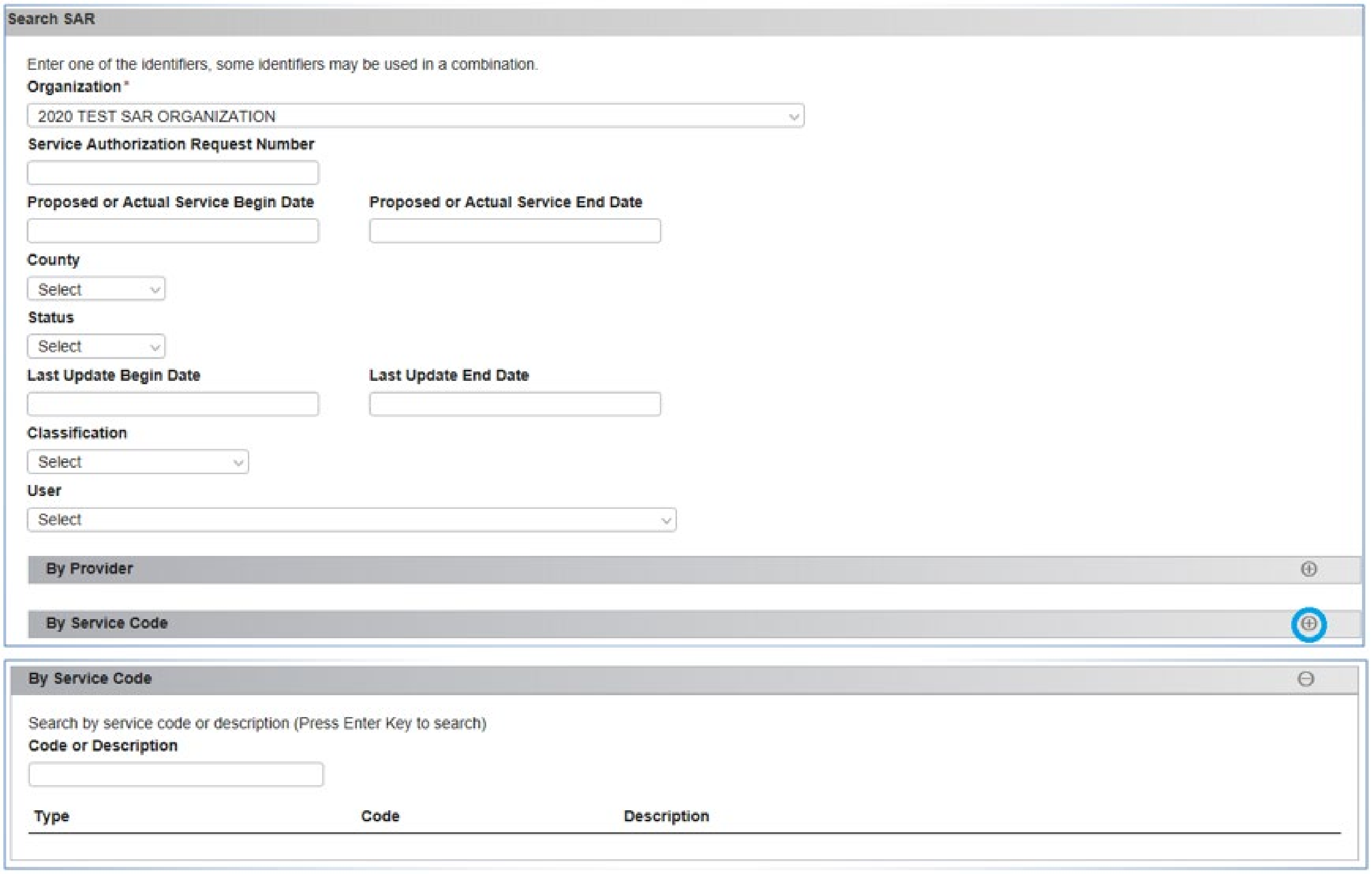


Figure 6-3, Search SAR – By Service Code

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.

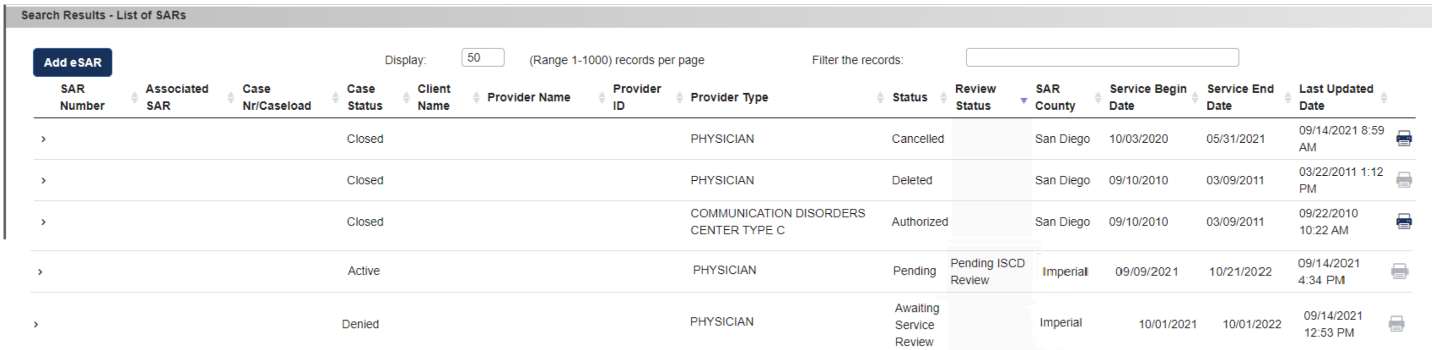


Figure 6-4, Search Results – List of SARs

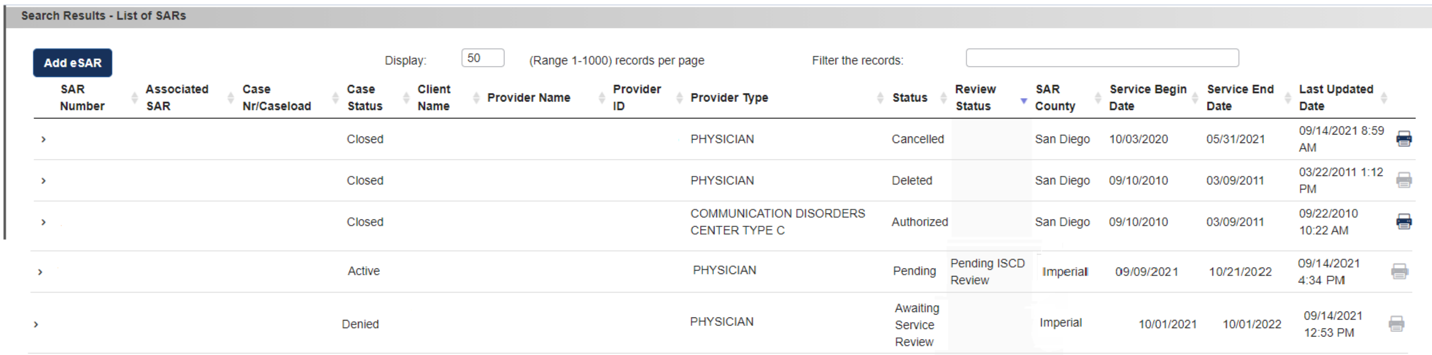
The Search Results – List of SARs section has list of SARs and an *Add eSAR* button.

- 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.

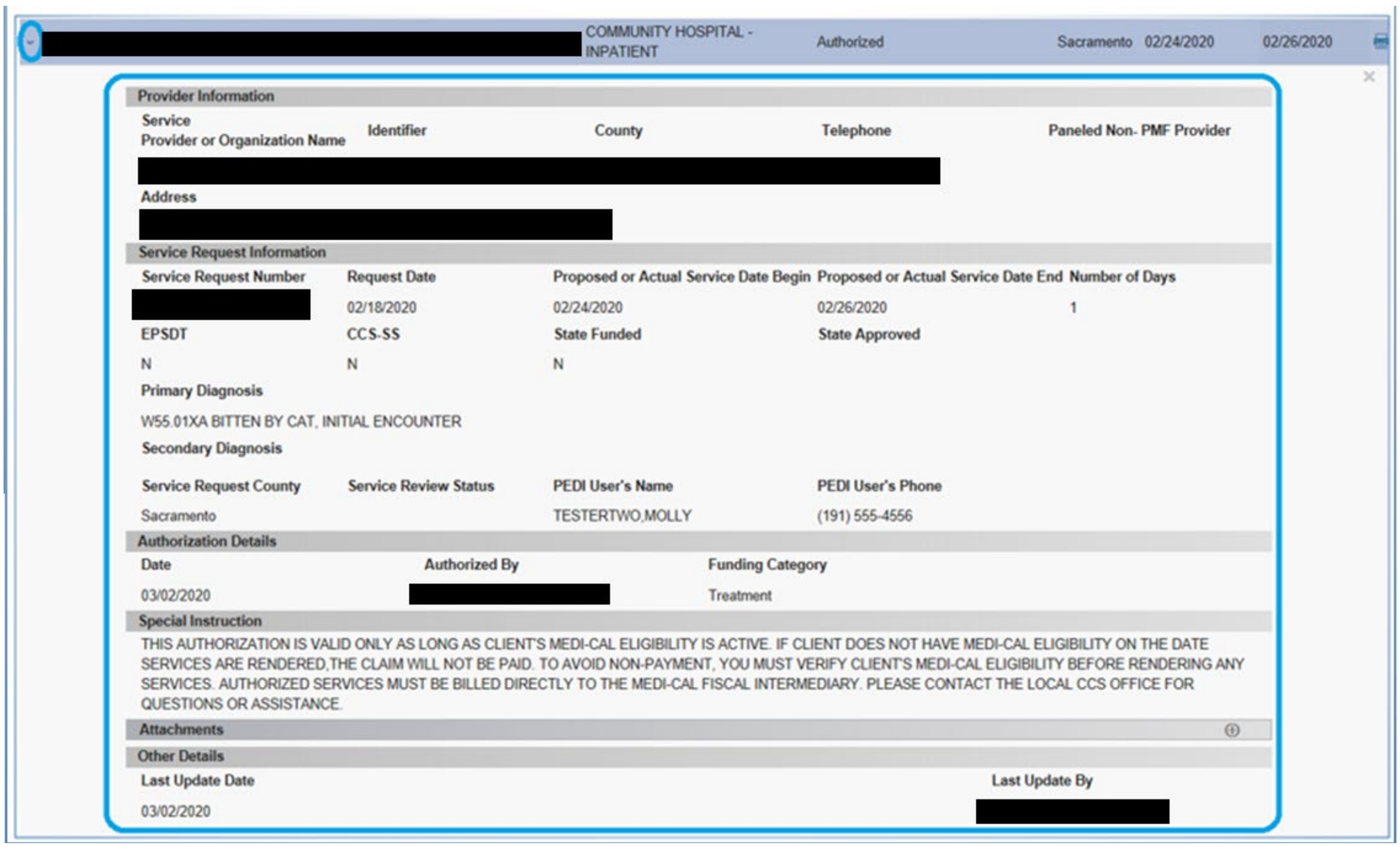


Search Results - List of SARs

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

SAR Number	Associated SAR	Case Nr/Caseload	Case Status	Client Name	Provider Name	Provider ID	Provider Type	Status	Review Status	SAR County	Service Begin Date	Service End Date	Last Updated Date
›			Closed				PHYSICIAN	Cancelled		San Diego	10/03/2020	05/31/2021	09/14/2021 8:59 AM
›			Closed				PHYSICIAN	Deleted		San Diego	09/10/2010	03/09/2011	03/22/2011 1:12 PM
›			Closed				COMMUNICATION DISORDERS CENTER TYPE C	Authorized		San Diego	09/10/2010	03/09/2011	09/22/2010 10:22 AM
›			Active				PHYSICIAN	Pending	Pending ISCD Review	Imperial	09/09/2021	10/21/2022	09/14/2021 4:34 PM
›			Denied				PHYSICIAN	Awaiting Service Review		Imperial	10/01/2021	10/01/2022	09/14/2021 12:53 PM

Figure 6-1 Search Results



[redacted] COMMUNITY HOSPITAL - INPATIENT Authorized Sacramento 02/24/2020 02/26/2020

Provider Information

Service Provider or Organization Name | Identifier | County | Telephone | Paneled Non- PMF Provider

[redacted]

Address

[redacted]

Service Request Information

Service Request Number	Request Date	Proposed or Actual Service Date Begin	Proposed or Actual Service Date End	Number of Days
[redacted]	02/18/2020	02/24/2020	02/26/2020	1

EPSDT	CCS-SS	State Funded	State Approved
N	N	N	

Primary Diagnosis

W55.01XA BITTEN BY CAT, INITIAL ENCOUNTER

Secondary Diagnosis

Service Request County	Service Review Status	PEDI User's Name	PEDI User's Phone
Sacramento		TESTERTWO,MOLLY	(191) 555-4556

Authorization Details

Date	Authorized By	Funding Category
03/02/2020	[redacted]	Treatment

Special Instruction

THIS AUTHORIZATION IS VALID ONLY AS LONG AS CLIENT'S MEDI-CAL ELIGIBILITY IS ACTIVE. IF CLIENT DOES NOT HAVE MEDI-CAL ELIGIBILITY ON THE DATE SERVICES ARE RENDERED,THE CLAIM WILL NOT BE PAID. TO AVOID NON-PAYMENT, YOU MUST VERIFY CLIENT'S MEDI-CAL ELIGIBILITY BEFORE RENDERING ANY SERVICES. AUTHORIZED SERVICES MUST BE BILLED DIRECTLY TO THE MEDI-CAL FISCAL INTERMEDIARY. PLEASE CONTACT THE LOCAL CCS OFFICE FOR QUESTIONS OR ASSISTANCE.

Attachments

Other Details

Last Update Date	Last Update By
03/02/2020	[redacted]

Figure 6-2, View SAR Details

6.4 How to Physically Print a Service Authorization Request (SAR)

Every web browser function differently for printing. Below is just one common method to print when using Chrome web browser when clicking on the Print icon.

SAR Number	Associated SAR	Case Nr/Caseload	Case Status	Client Name	Provider Name	Provider ID	Provider Type	Status	Review Status	SAR County	Service Begin Date	Service End Date	Last Updated Date
[redacted]		[redacted]	Active	[redacted]	[redacted]	[redacted]	HOME HEALTH AGENCY	Authorized		San Diego	10/11/2023	12/31/2023	11/03/2023 10:13 AM

Figure 6-3, SAR – Print Icon

Chrome: How to Physically Print a 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.

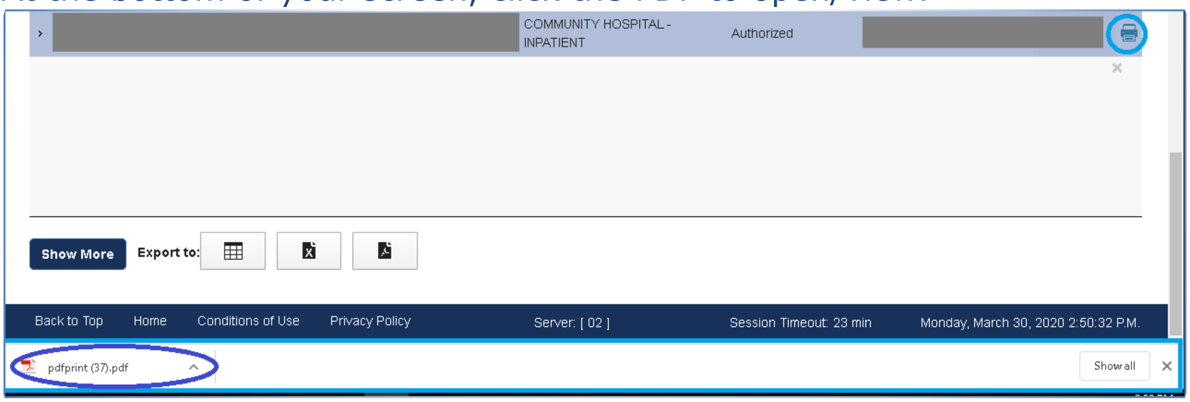


Figure 6-4, SAR – Print Icon on Chrome

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

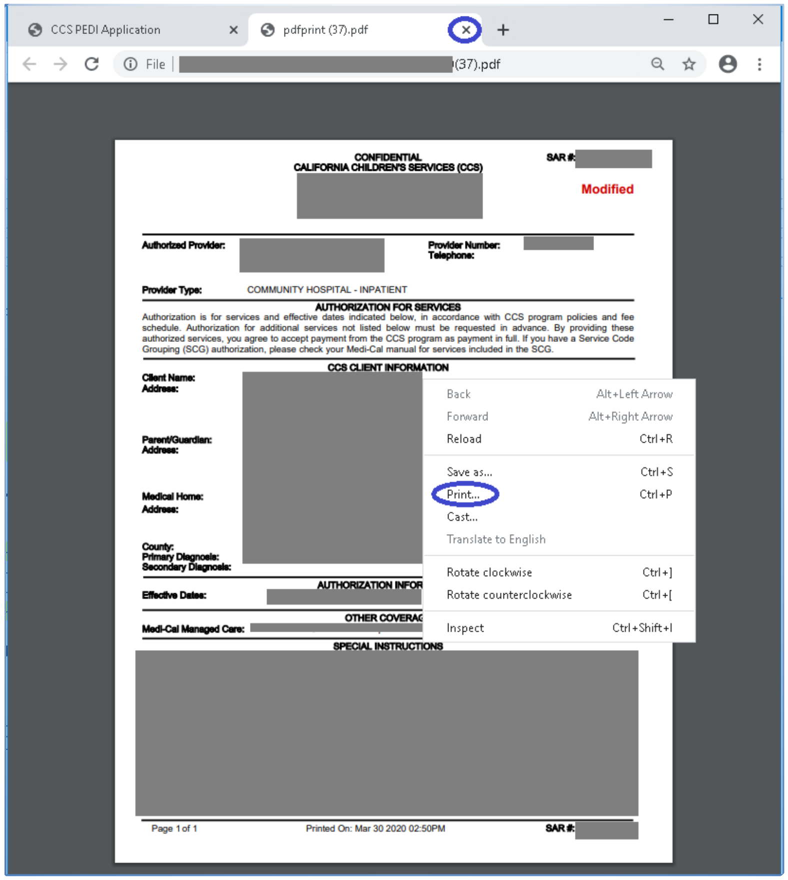


Figure 6-5, SAR – Print PDF Chrome

When done, close down the PDF so you don't have too many tab open.

6.5 SAR Denial Letter – How to View/Print

User may print SAR Denial Letter directly from Search Results – List of SARs:

The Print icon is enable for Denied SAR NOA and SAR deferral/cancellation letter from the Search Results – List of SARs by clicking on the Print icon on the SAR denial.

SAR Number	Associated SAR	Case Nr/Caseload	Case Status	Client Name	Provider Name	Provider ID	Provider Type	Status	Review Status	SAR County	Service Begin Date	Service End Date	Last Updated Date
[redacted]			Active	[redacted]			PHYSICIAN	Denied		San Diego	10/27/2023	10/26/2024	11/07/2023 9:19 AM

Figure 6-6, SAR – Print Icon

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)

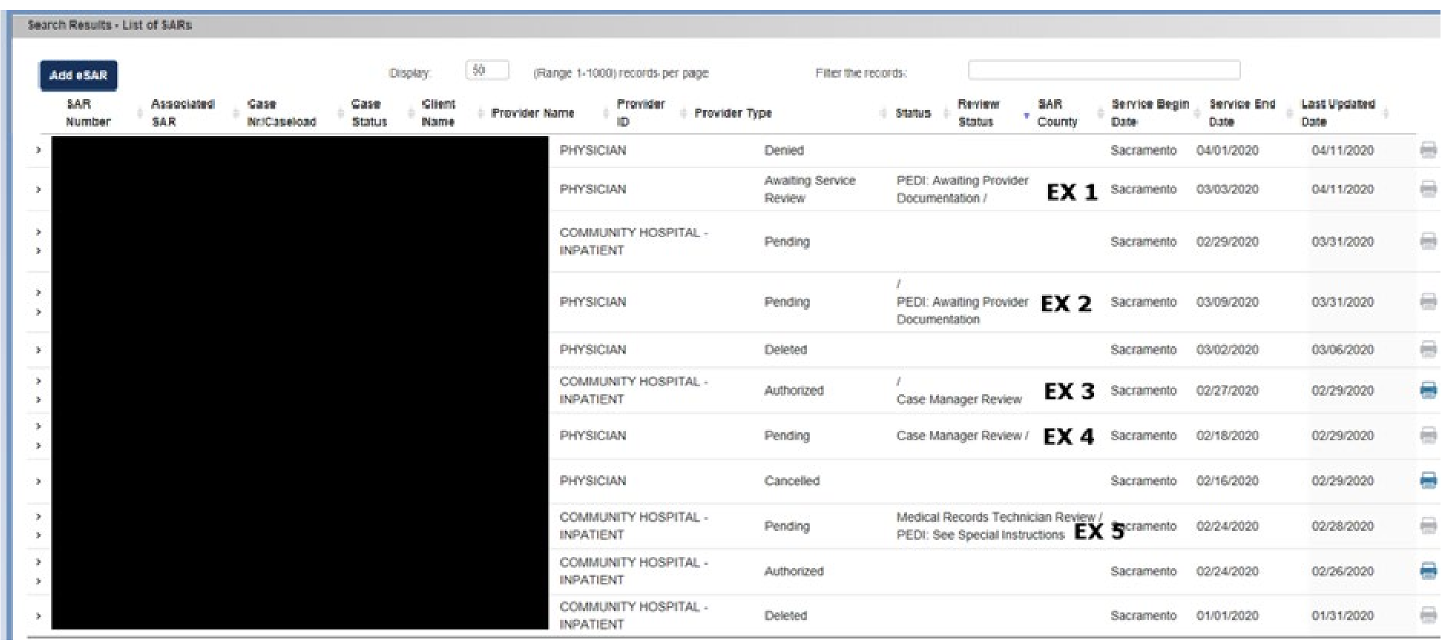
  - Note that there are more than a dozen review statuses that CMS Net user uses set on SAR for their own internal SAR routing and the review status is viewable in PEDI.
  - There are some review reasons that CMS Net user may use to communicate to PEDI user.

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


Search Results - List of SARs

Add eSAR

Display: 50 (Range 1-1000) records per page

Filter the records:

SAR Number	Associated SAR	Case Nr/Caseload	Case Status	Client Name	Provider Name	Provider ID	Provider Type	Status	Review Status	SAR County	Service Begin Date	Service End Date	Last Updated Date
[redacted]							PHYSICIAN	Denied		Sacramento	04/01/2020	04/11/2020	
							PHYSICIAN	Awaiting Service Review	PEDI: Awaiting Provider Documentation / EX 1	Sacramento	03/03/2020	04/11/2020	
							COMMUNITY HOSPITAL - INPATIENT	Pending		Sacramento	02/29/2020	03/31/2020	
							PHYSICIAN	Pending	/ PEDI: Awaiting Provider Documentation EX 2	Sacramento	03/09/2020	03/31/2020	
							PHYSICIAN	Deleted		Sacramento	03/02/2020	03/06/2020	
							COMMUNITY HOSPITAL - INPATIENT	Authorized	/ Case Manager Review EX 3	Sacramento	02/27/2020	02/29/2020	
							PHYSICIAN	Pending	Case Manager Review / EX 4	Sacramento	02/18/2020	02/29/2020	
							PHYSICIAN	Cancelled		Sacramento	02/16/2020	02/29/2020	
							COMMUNITY HOSPITAL - INPATIENT	Pending	Medical Records Technician Review / PEDI: See Special Instructions EX 5	Sacramento	02/24/2020	02/28/2020	
							COMMUNITY HOSPITAL - INPATIENT	Authorized		Sacramento	02/24/2020	02/26/2020	
							COMMUNITY HOSPITAL - INPATIENT	Deleted		Sacramento	01/01/2020	01/31/2020	

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.

7 CLIENT - SEARCH CLIENT

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.

Once you search and selects a client, the system displays the following list for the client:

- Search Results - List of SARs
- Search Results - List of Referrals
- Search Results - List of Correspondence.

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.

Figure 7-1, Client Menu

2) On the Search Client page, to search for client, enter one of the identifiers.

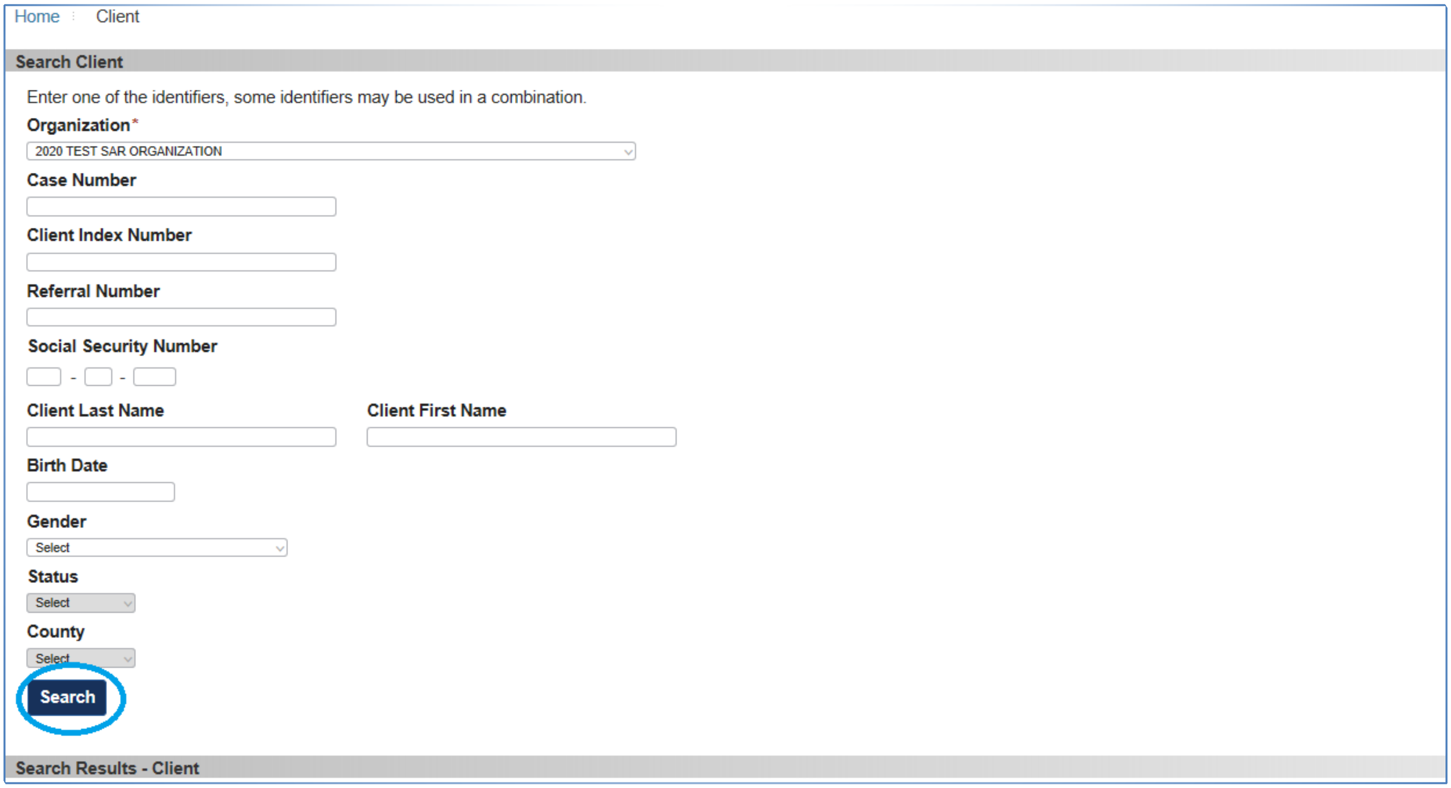


Figure 7-2, Search Client

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 <u>not</u> 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.

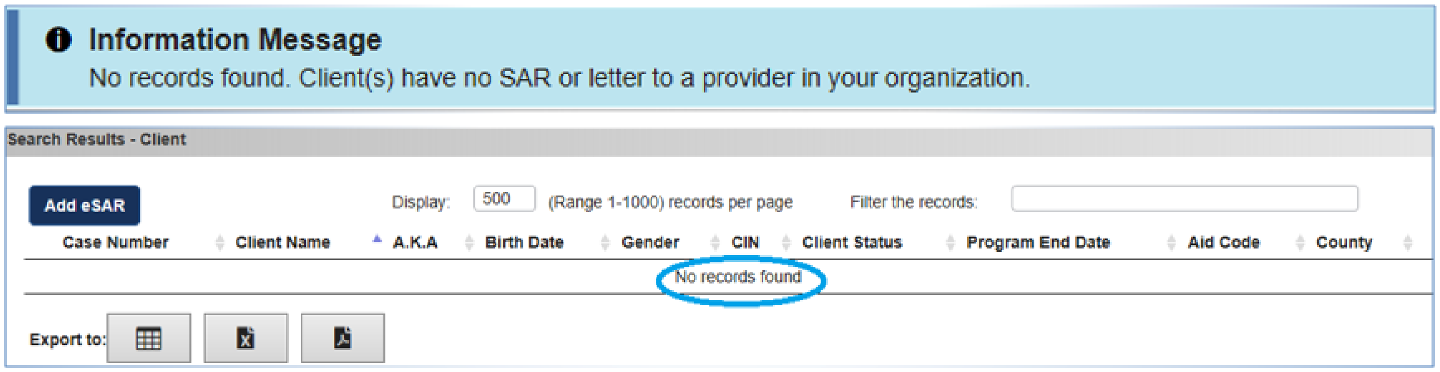


Figure 7-3, Search Result – No records Found

Important notes:

For provider organization, when searching for client known to CCS or GHPP, the search result displays client on the search result only if the client is already associated with your organization; meaning, as at least 1 SAR exist to your provider.

Note that even if CCS county user provide the CIN, Case Number, SAR, etc., if the client doesn't have at least 1 SAR issued to your provider, client will not be found on search result.

eSAR: If you need to create an authorization to a known to CCS or GHPP client but the client is not found.

- **Click on the "Add eSAR" button and complete a new eSAR fillable form.**
- **Once you submit your request, if your client info matches the CCS/GHPP client, system links to that client.**
- **Hints: If County user provides CIN or Case Number, when completing the eSAR fillable form, ensure to enter the CIN or Case Number to ensure your request links to the client on CMSNet.**

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.

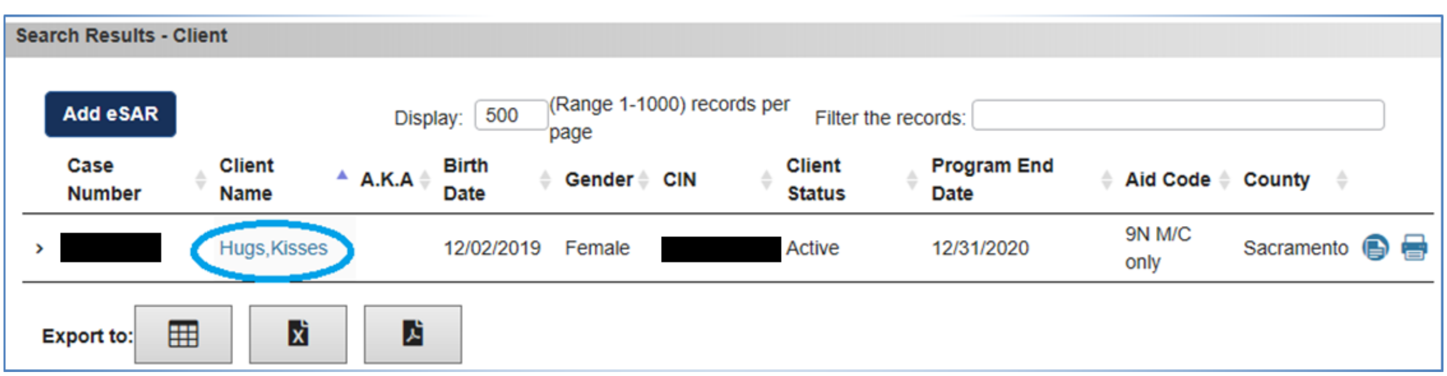


Figure 7-4, Search Result – Client

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.

8 SEARCH RESULTS FOR THE SELECTED CLIENT

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.

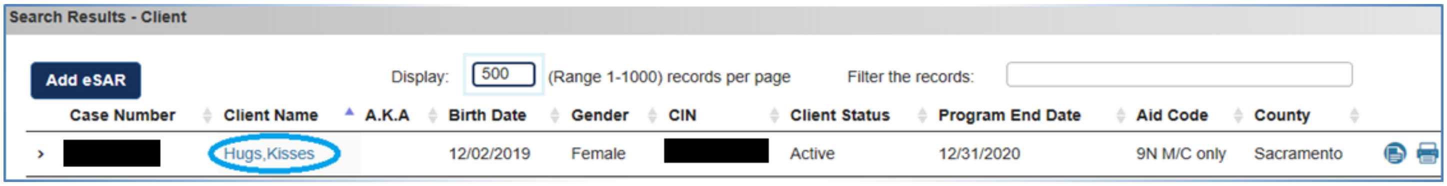


Figure 8-1, Search Result – Client

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

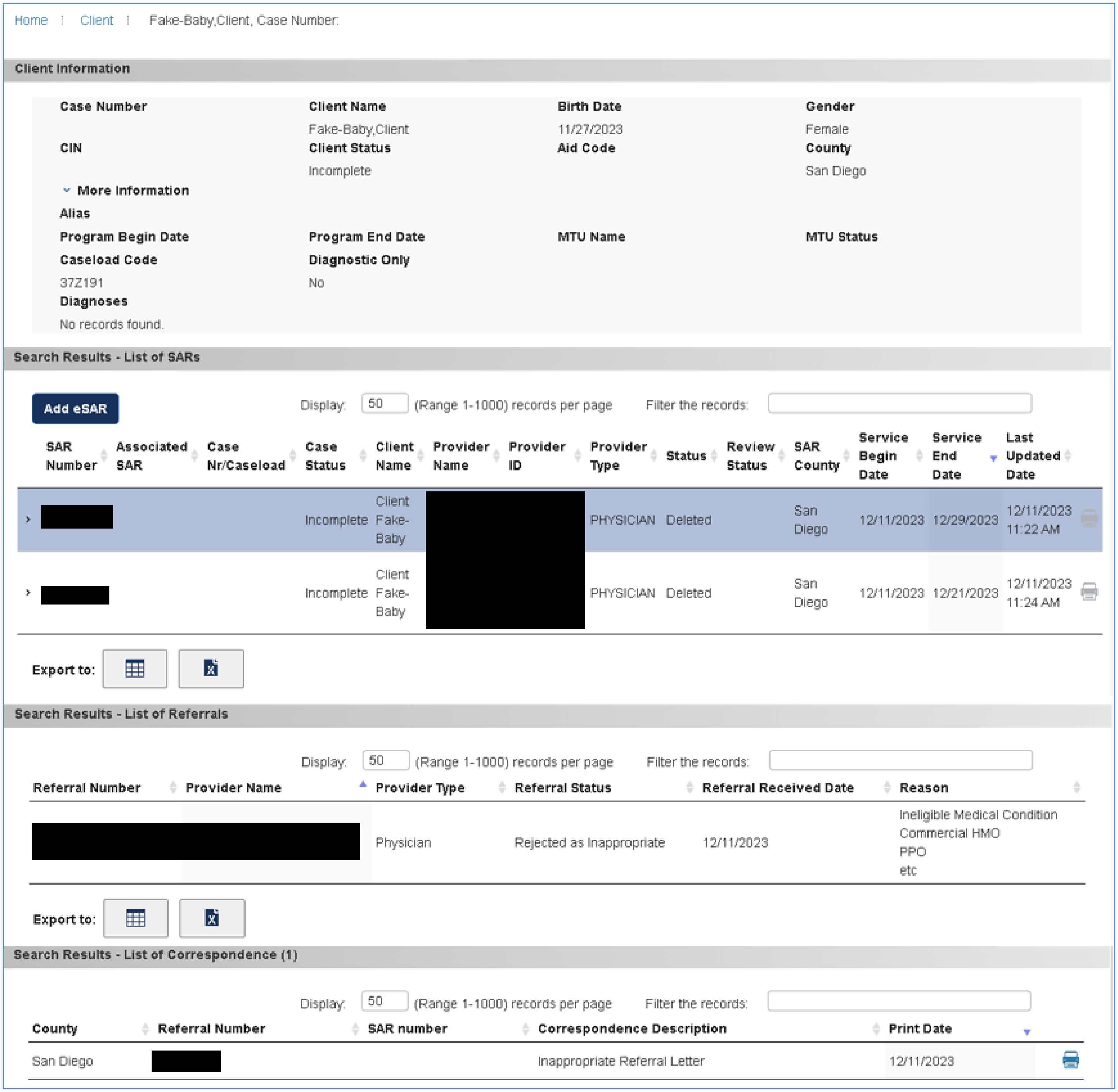


Figure 8-2, Search Results- Client

8.1 Client Information Section

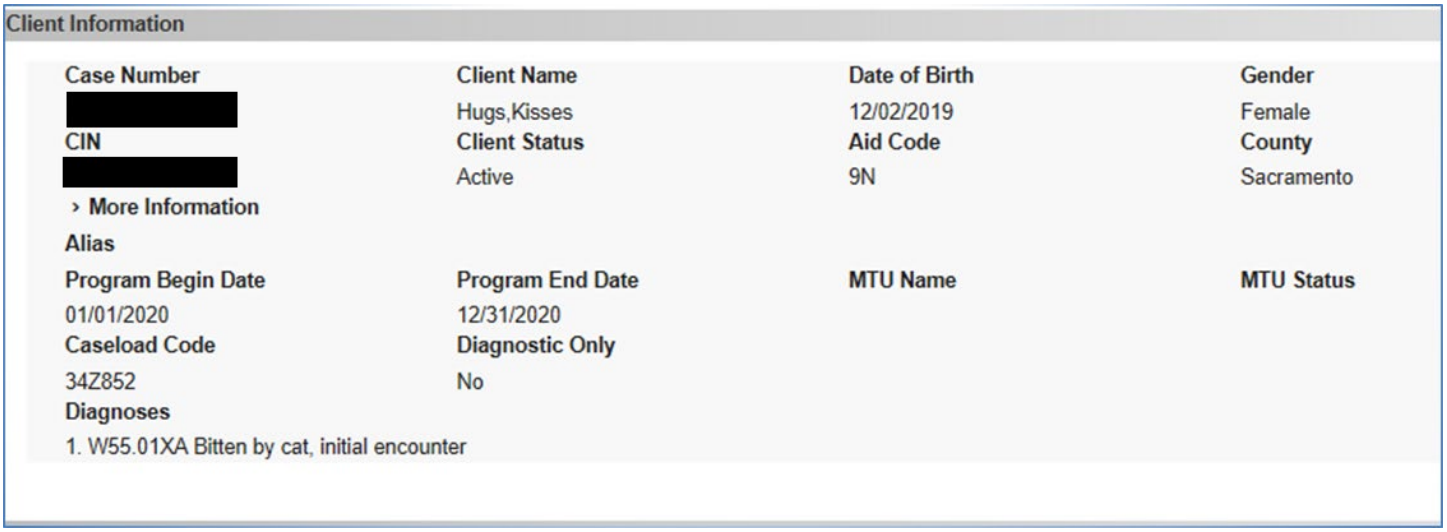


Figure 8-3, Client Information section

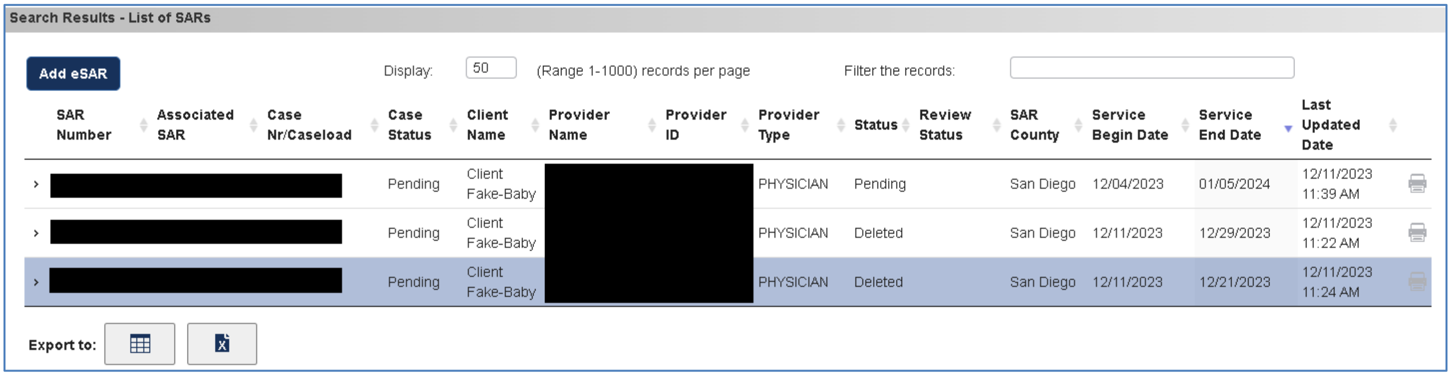
Client Information section is consistent on all client related screen/sections.

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

Below the Client Information section is the **Search Results - List of SARs** section.



Search Results - List of SARs

Add eSAR

Display: 50 (Range 1-1000) records per page

Filter the records:

SAR Number	Associated SAR	Case Nr/Caseload	Case Status	Client Name	Provider Name	Provider ID	Provider Type	Status	Review Status	SAR County	Service Begin Date	Service End Date	Last Updated Date
› [redacted]			Pending	Client Fake-Baby	[redacted]		PHYSICIAN	Pending		San Diego	12/04/2023	01/05/2024	12/11/2023 11:39 AM
› [redacted]			Pending	Client Fake-Baby	[redacted]		PHYSICIAN	Deleted		San Diego	12/11/2023	12/29/2023	12/11/2023 11:22 AM
› [redacted]			Pending	Client Fake-Baby	[redacted]		PHYSICIAN	Deleted		San Diego	12/11/2023	12/21/2023	12/11/2023 11:24 AM

Export to:

Figure 8-4, Search Results – List of SARs

The Search Results - List of SARs section has the following:

Add eSAR button: Click button to add a new eSAR request for the selected client. Takes user to the SAR Fillable Form for the selected client.

- Add eSAR button is enabled/disabled depending upon user's eSAR privileges.

Search Results - List of SARs table has the following columns:

- (>) Expand/collapse icon: Displays the SAR information.
  - Click **(>)** icon to view the SAR details. **If the SAR is deleted, expanding the detail allows you to view the Rejection Details and Return Request Reason details.**
- SAR Number: SAR Number hyperlink takes user to next screen to modify the SAR.
  - Link is enabled for user with eSAR roles and if SAR is not deleted, denied, or cancelled.
- Associated SAR: displays associated SARs. These are the deleted or processed SARs. User can expand/collapse (>) to view SAR details.
- Case number/ Caseload
- Case Status
- Client Name
- Provider Name
- Provider ID
- Provider Type
- Status
- SAR County
- Service Begin Date
- Service End Date
- Last Updated Date
- Print icon: Opens PDF of SAR for Authorized and Cancelled status.
  - Icon is disabled for Denied, Deleted, Awaiting Service Review, Pending, and Request Approval Y/N.

How to View Rejection Details on SAR

When eSAR is deleted. The SAR detail displays the "**Rejection Details**" section that explains the reason why it's been deleted.

Step 1. From the List of SARs, click on the > icon to expand the SAR details.

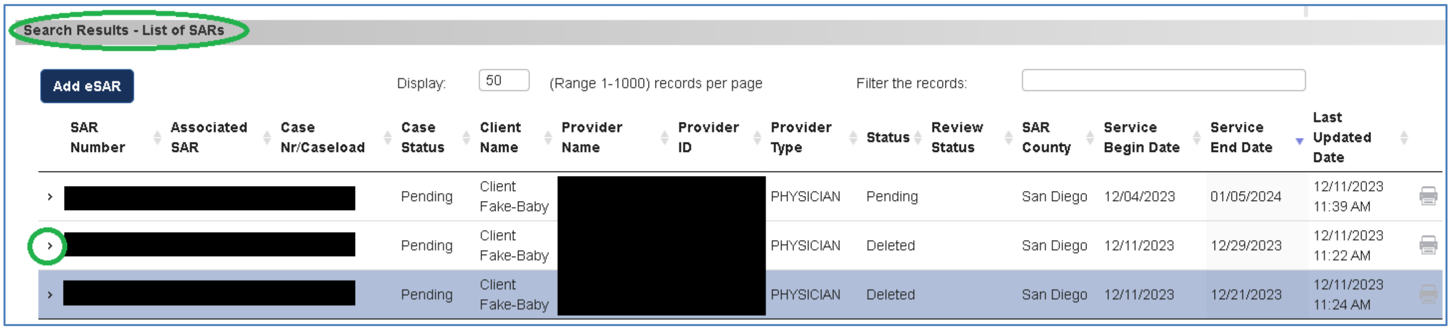


Figure 8-1, Search Results

Step 2. Once the SAR detail is expanded, scroll down to the "Rejection Details" section.

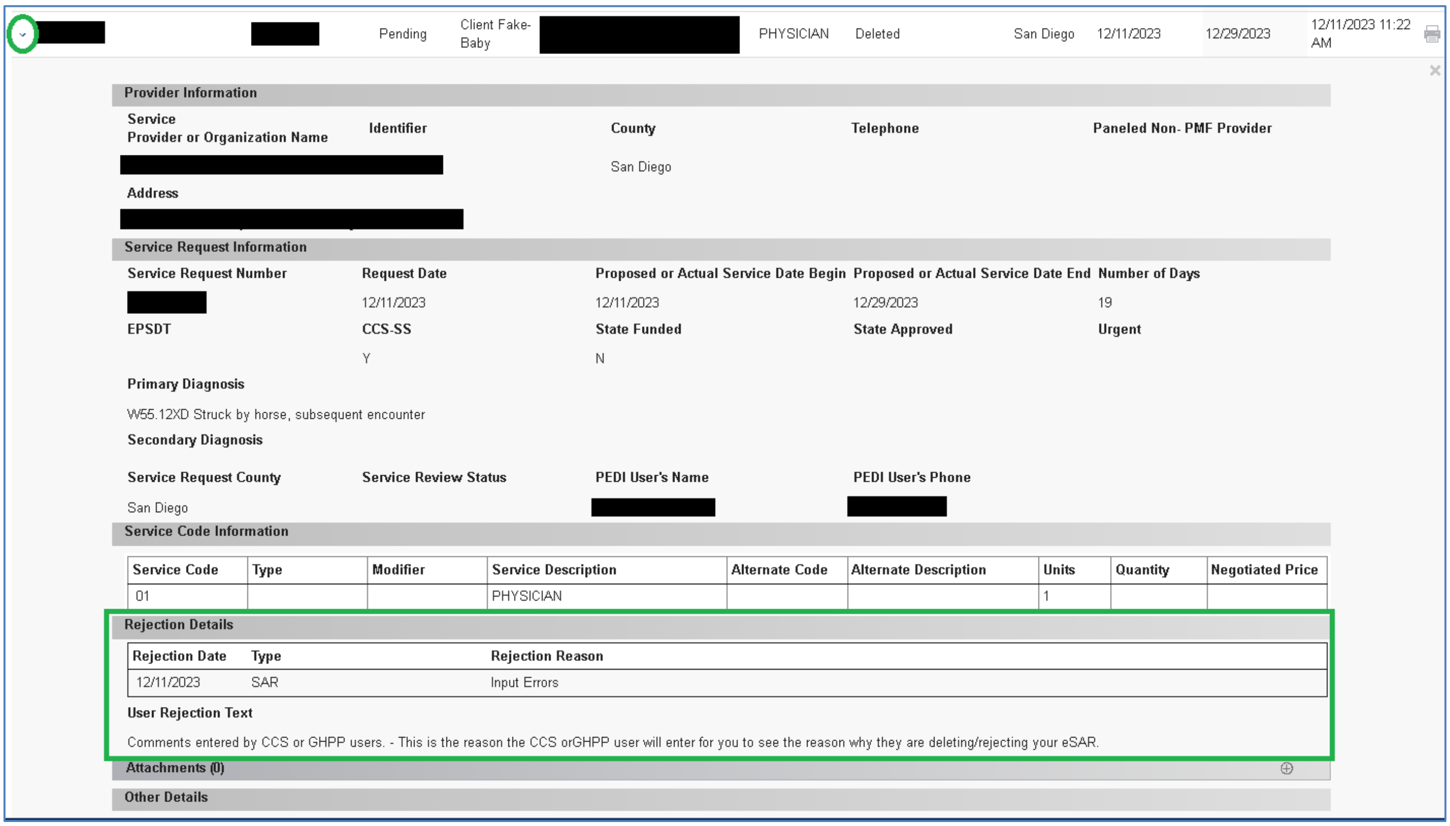


Figure 8-2, SAR View Detail

- The "Rejection Details" section displays the Rejection Date, Type, and Rejection Reason.
- In addition, there will be a "User Rejection Text" where they CCS/GHPP user entered the manual comments.

How to View Return Request Reason on SAR and View Referral Letter

Some eSAR have a referral linked to it.

- For example, a new client SAR auto creates a referral along with the SAR.

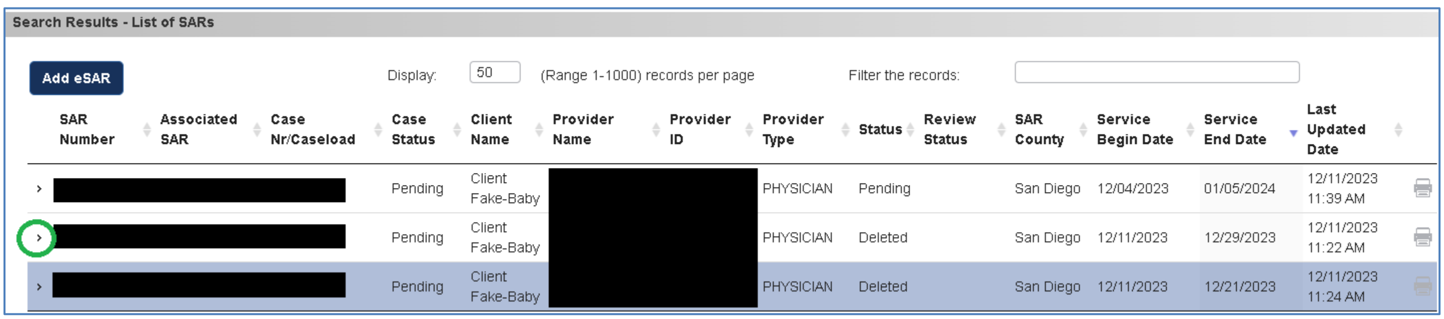
- Or if the case status is “Closed, Not Open, Denied, or Incomplete”, system creates a referral on behalf of provider if the “CMS Net” application does not have a referral in (Awaiting Case Review).

When an eSAR has a linked referral, the CCS or GHPP user has the option to delete/reject eSAR via Authorization module or to reject/delete the referral from the Referral module.

When the CCS or GHPP user reject/delete the referral from the Referral module, the system will do the following:

1) Generates the Inappropriate Referral Letter.
2) Auto deletes the associated eSAR. The associated eSAR will display two sections:
    - Rejection Details section
    - Return Request Reason section

Step 1. From the List of SARs, click on the > icon to expand the SAR details.



Search Results - List of SARs

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

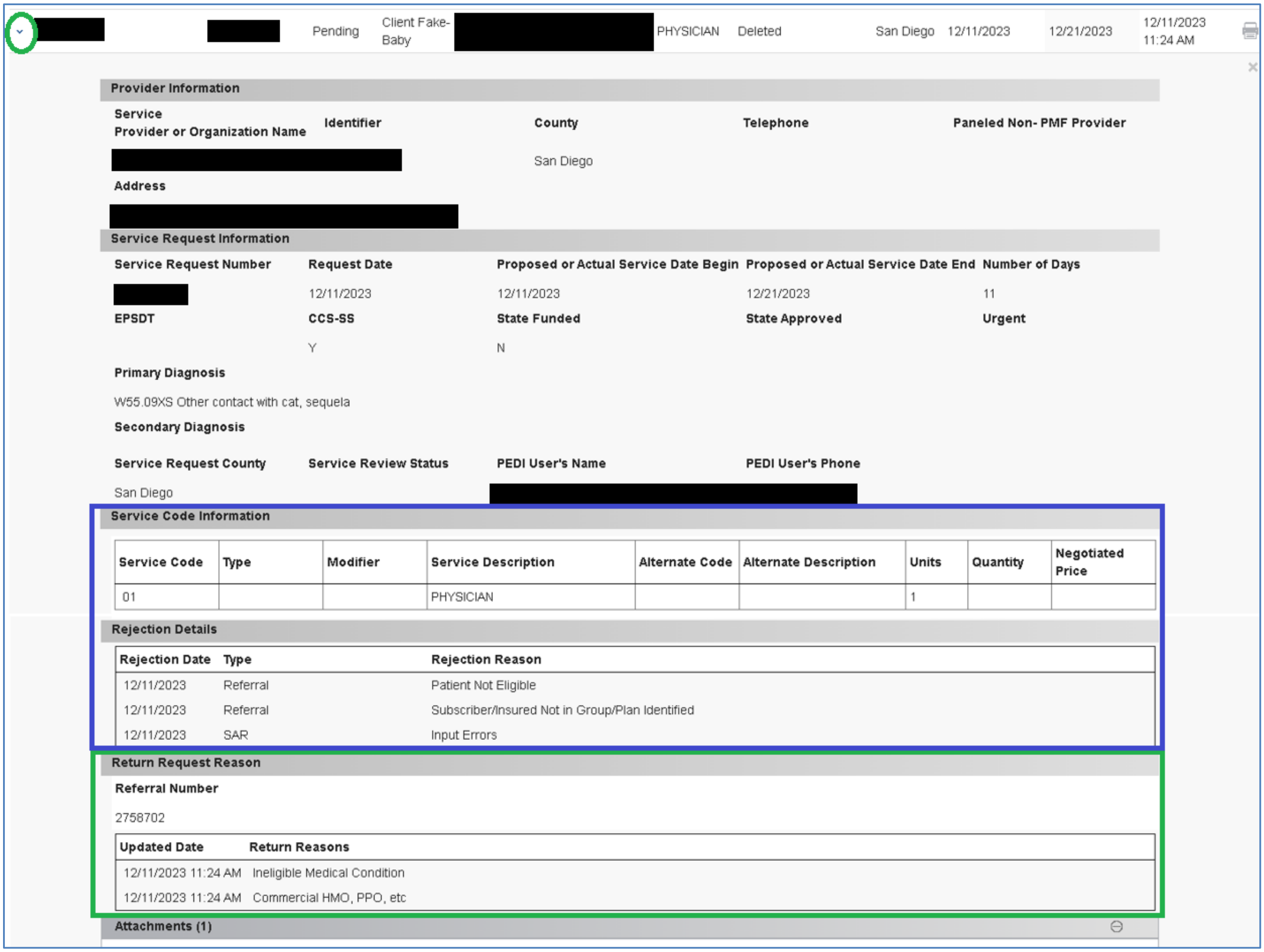
SAR Number	Associated SAR	Case Nr/Caseload	Case Status	Client Name	Provider Name	Provider ID	Provider Type	Status	Review Status	SAR County	Service Begin Date	Service End Date	Last Updated Date
[redacted]			Pending	Client Fake-Baby	[redacted]		PHYSICIAN	Pending		San Diego	12/04/2023	01/05/2024	12/11/2023 11:39 AM
[redacted]			Pending	Client Fake-Baby	[redacted]		PHYSICIAN	Deleted		San Diego	12/11/2023	12/29/2023	12/11/2023 11:22 AM
[redacted]			Pending	Client Fake-Baby	[redacted]		PHYSICIAN	Deleted		San Diego	12/11/2023	12/21/2023	12/11/2023 11:24 AM

Figure 8-3, Search Results

Step 2. Once the SAR detail is expanded, scroll down to the “Rejection Details” and “Return Request Reason” sections.

- The **Rejection Details section** displays the 278 transaction mapped reasons.

- The **Return Request Reason section** displays the associated Referral Number and the reason the user selected when they rejected the referral as inappropriate.



[redacted] [redacted] Pending Client Fake-Baby [redacted] PHYSICIAN Deleted San Diego 12/11/2023 12/21/2023 12/11/2023 11:24 AM

Provider Information

Service Provider or Organization Name	Identifier	County	Telephone	Paneled Non- PMF Provider
[redacted]		San Diego		

Address

[redacted]

Service Request Information

Service Request Number	Request Date	Proposed or Actual Service Date Begin	Proposed or Actual Service Date End	Number of Days
[redacted]	12/11/2023	12/11/2023	12/21/2023	11

EPSDT	CCS-SS	State Funded	State Approved	Urgent
	Y	N		

Primary Diagnosis

W55.09XS Other contact with cat, sequela

Secondary Diagnosis

Service Request County	Service Review Status	PEDI User's Name	PEDI User's Phone
San Diego		[redacted]	

Service Code Information

Service Code	Type	Modifier	Service Description	Alternate Code	Alternate Description	Units	Quantity	Negotiated Price
01			PHYSICIAN			1		

Rejection Details

Rejection Date	Type	Rejection Reason
12/11/2023	Referral	Patient Not Eligible
12/11/2023	Referral	Subscriber/Insured Not in Group/Plan Identified
12/11/2023	SAR	Input Errors

Return Request Reason

Referral Number

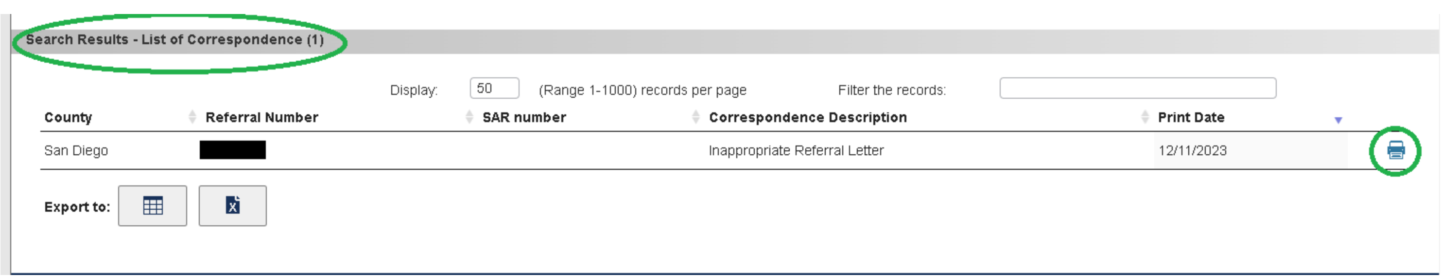
2758702

Updated Date	Return Reasons
12/11/2023 11:24 AM	Ineligible Medical Condition
12/11/2023 11:24 AM	Commercial HMO, PPO, etc

Attachments (1)

Figure 8-4, SAR Details

You may take the referral number from the “Return Request Reason” section and go to the “Search Results – List of Correspondence” section to view/print the Inappropriate Referral Letter as seen below.



Search Results - List of Correspondence (1)

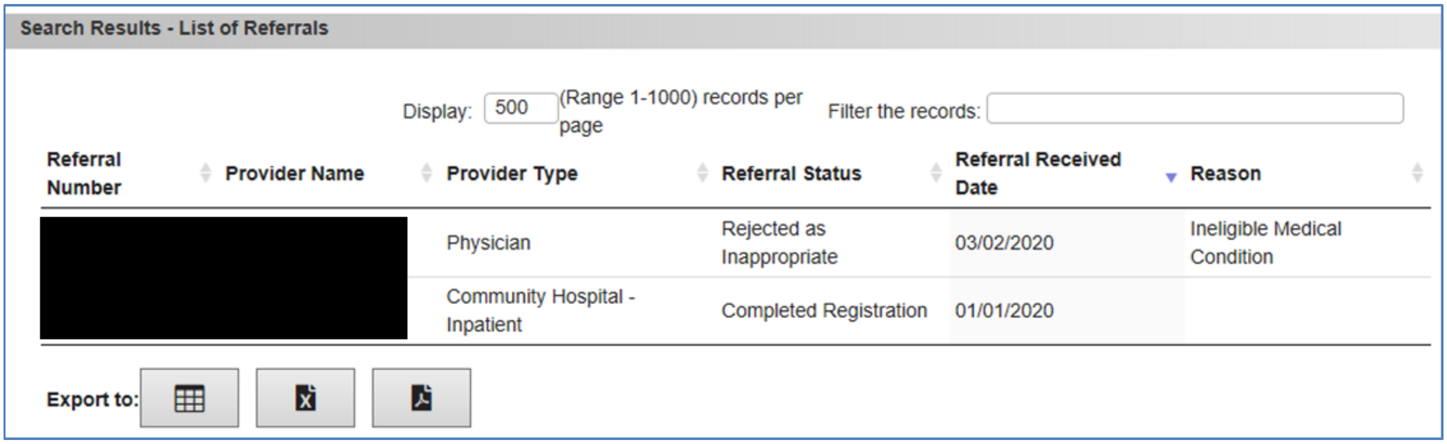
Display: 50 (Range 1-1000) records per page Filter the records:

County	Referral Number	SAR number	Correspondence Description	Print Date
San Diego	[redacted]		Inappropriate Referral Letter	12/11/2023

Export to:

Figure 8-5, List of Correspondence

8.3 Search Results – List of Referrals


Search Results - List of Referrals

Display: 500 (Range 1-1000) records per page Filter the records:

Referral Number	Provider Name	Provider Type	Referral Status	Referral Received Date	Reason
[redacted]		Physician	Rejected as Inappropriate	03/02/2020	Ineligible Medical Condition
		Community Hospital - Inpatient	Completed Registration	01/01/2020	

Export to:

Figure 8-5, Search Results – List of Referrals

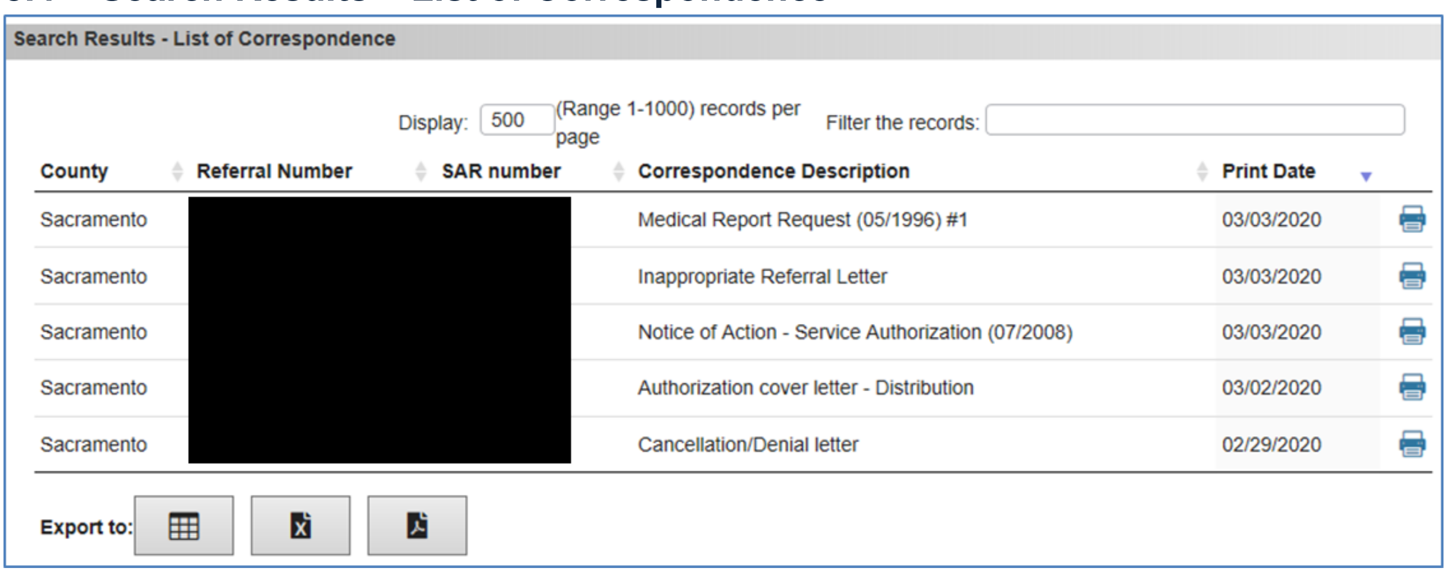
Provider organization: System displays the list of active case referrals that were submitted by the active NPI's in that organization and for the selected client.

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

8.4 Search Results – List of Correspondence


Search Results - List of Correspondence

Display: 500 (Range 1-1000) records per page Filter the records:

County	Referral Number	SAR number	Correspondence Description	Print Date	
Sacramento	[redacted]		Medical Report Request (05/1996) #1	03/03/2020	
Sacramento			Inappropriate Referral Letter	03/03/2020	
Sacramento			Notice of Action - Service Authorization (07/2008)	03/03/2020	
Sacramento			Authorization cover letter - Distribution	03/02/2020	
Sacramento			Cancellation/Denial letter	02/29/2020	

Export to:

Figure 8-6, 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

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

9 ESAR: SAR FILLABLE FORM

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.

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

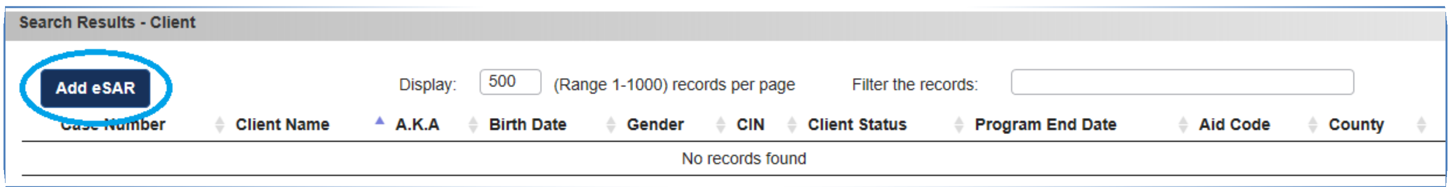


Figure 9-2, Add SAR

3) System navigates user to the **SAR Fillable Form** page.

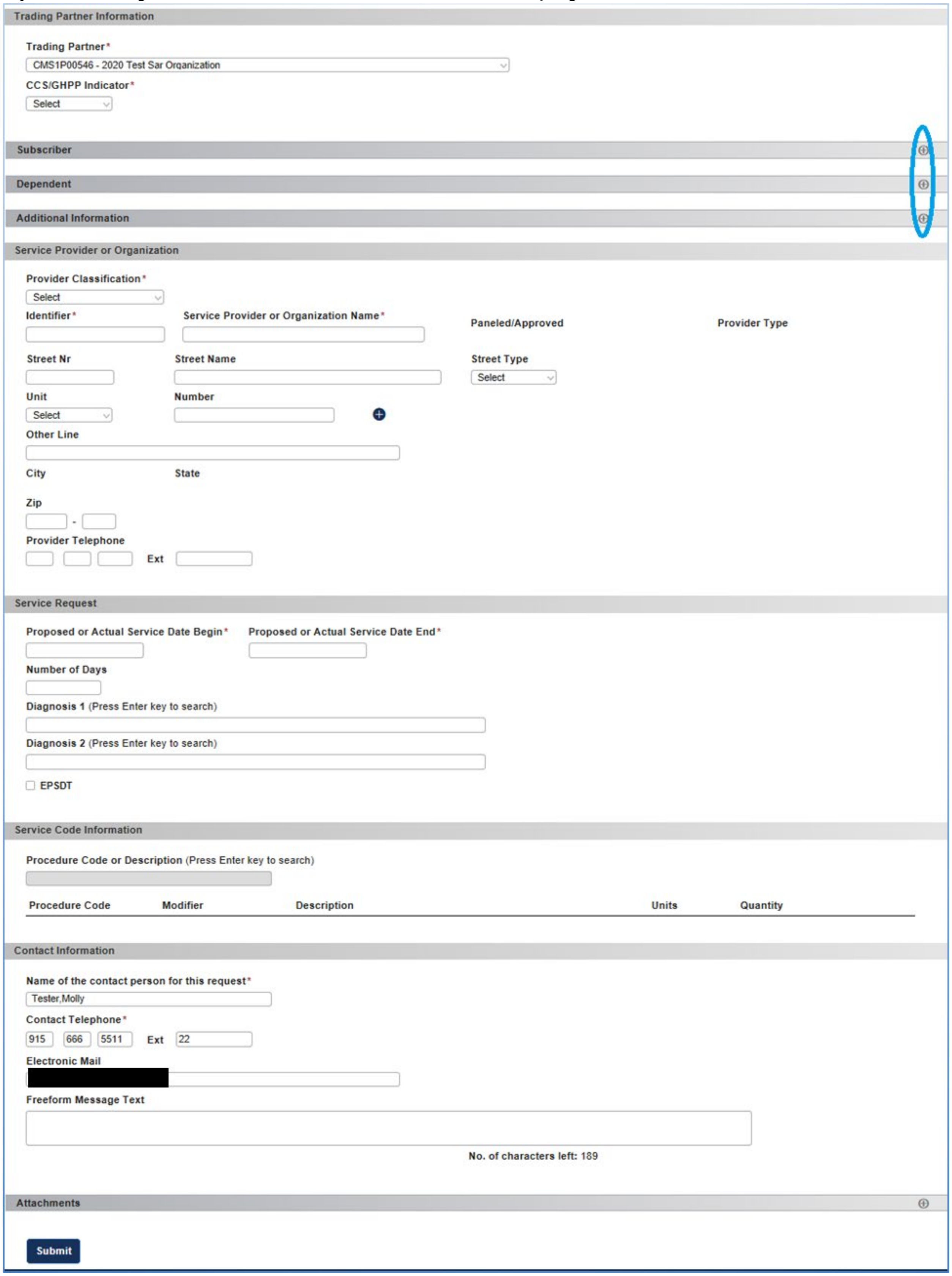


Figure 9-3, SAR Fillable Form

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

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

Select from the drop down.

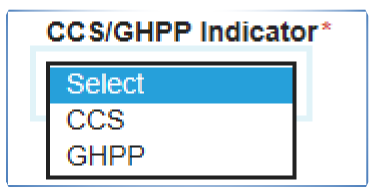


Figure 9-5, CCS/GHPP Indicator

Subscriber

5) Complete the Subscriber section.

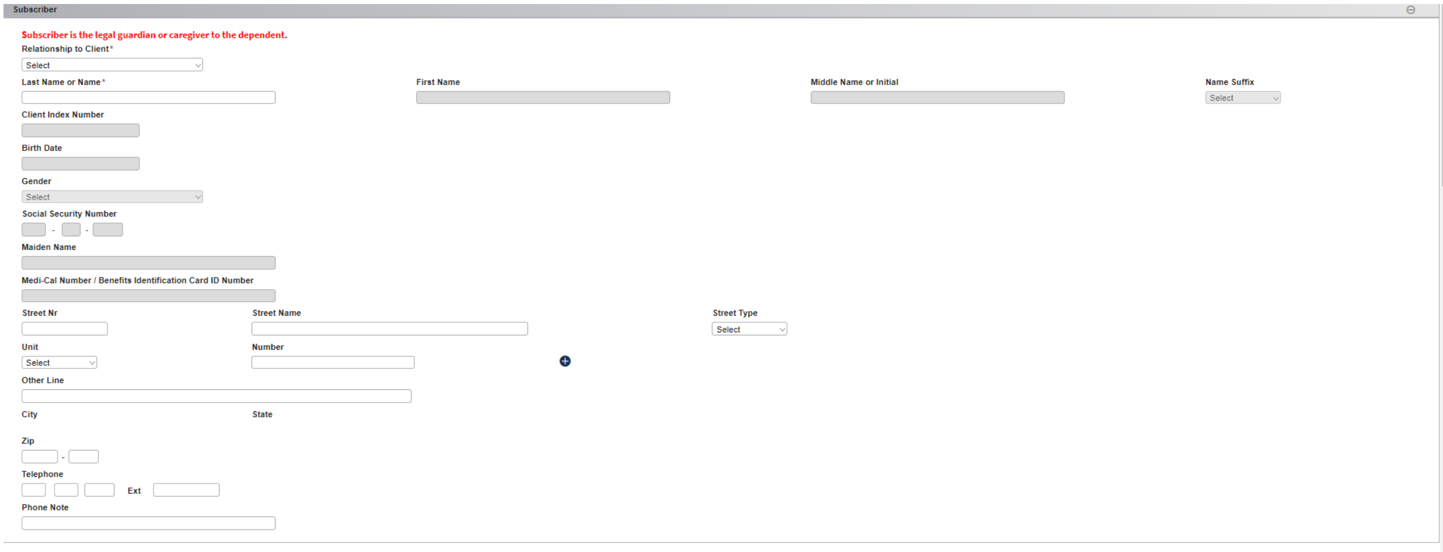


Figure 9-6, Subscriber

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 / Benefits Identification Card ID 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.

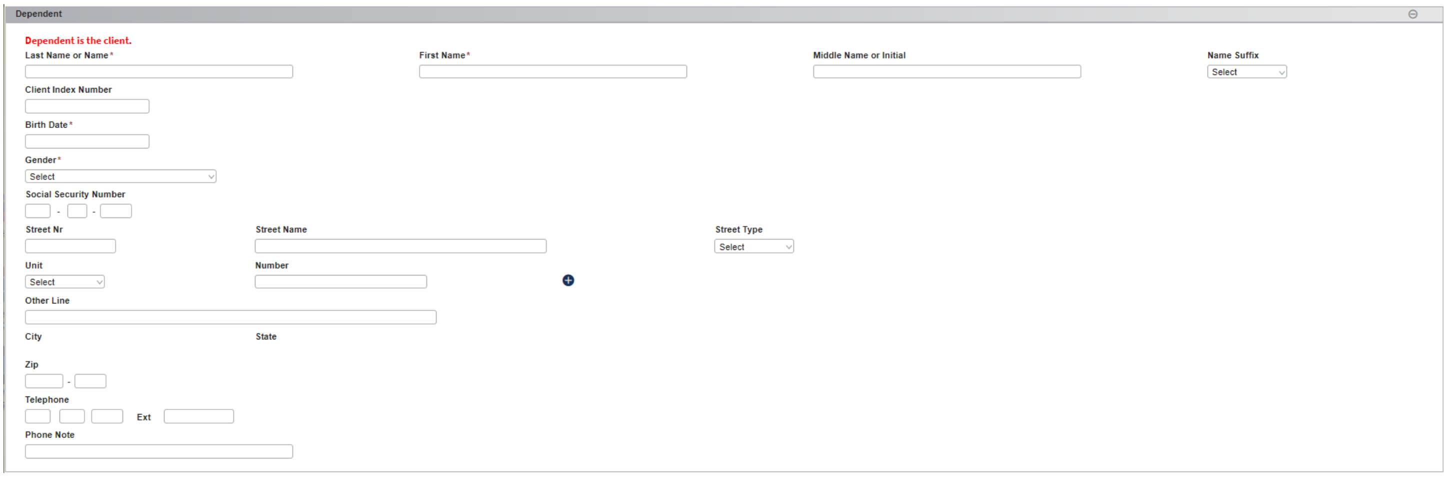


Figure 9-7, Dependent

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.

- Effective June 12, 2020, an enhancement was added to auto input the 00 for CIN if user forgets.

Additional Information

7) Complete the Additional Information section.

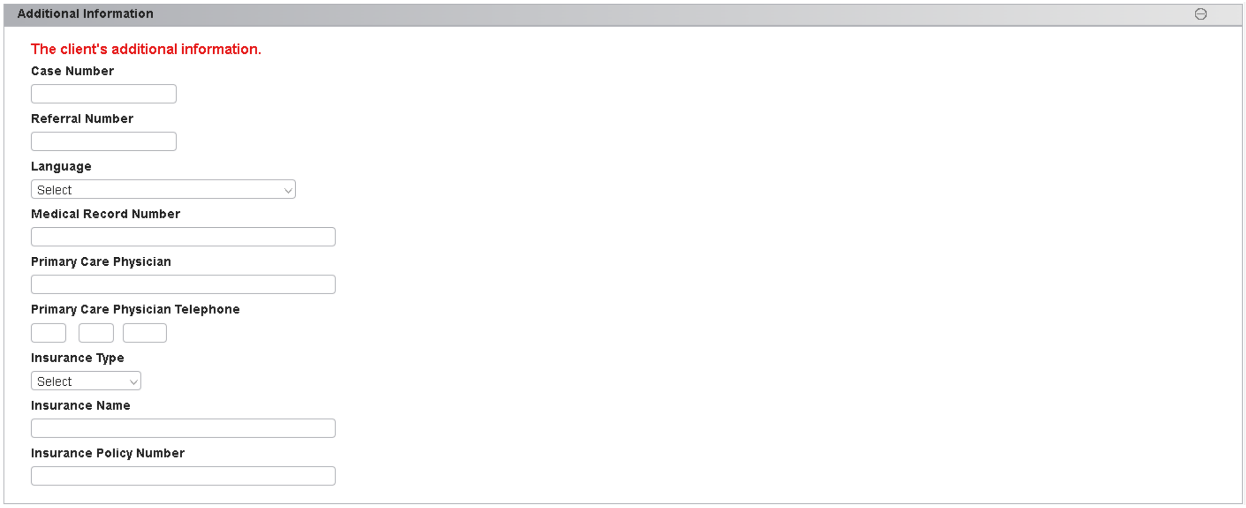


Figure 9-8, Additional Information

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.

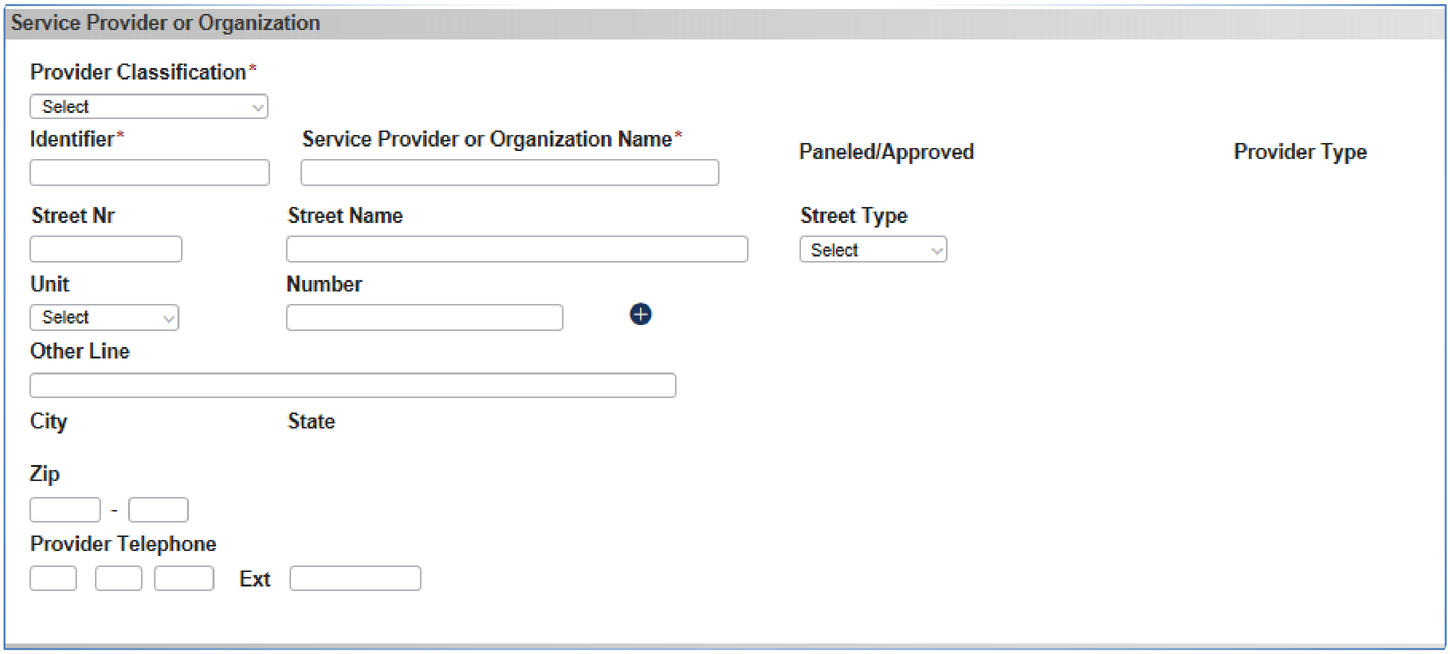


Figure 9-9, Service Provider or Organization

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.

Service Request

9) Complete the **Service Request** section.

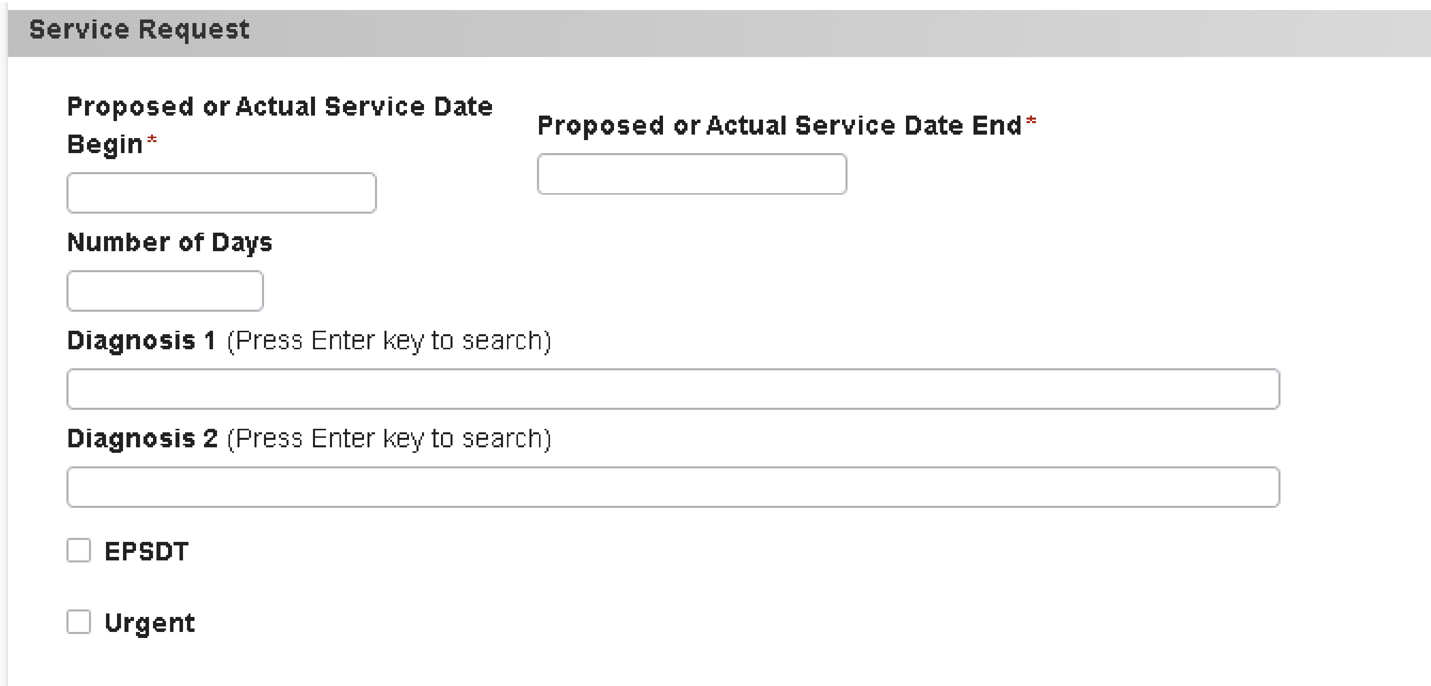


Figure 9-10, Service Request

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.

Urgent: This is an optional checkbox field. This field flags the SAR as an authorization for urgent review.

Service Code Information

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

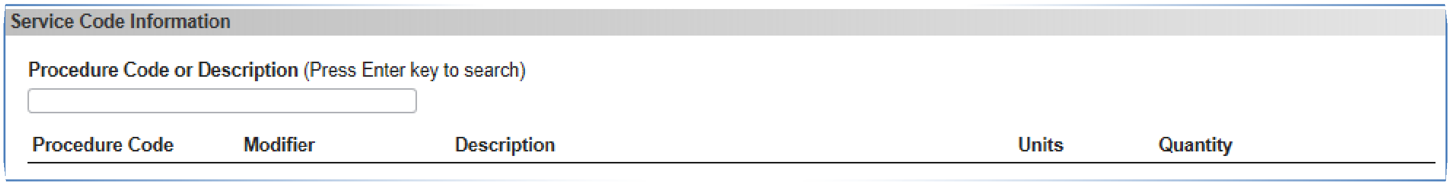


Figure 9-11, Service Code Information

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.

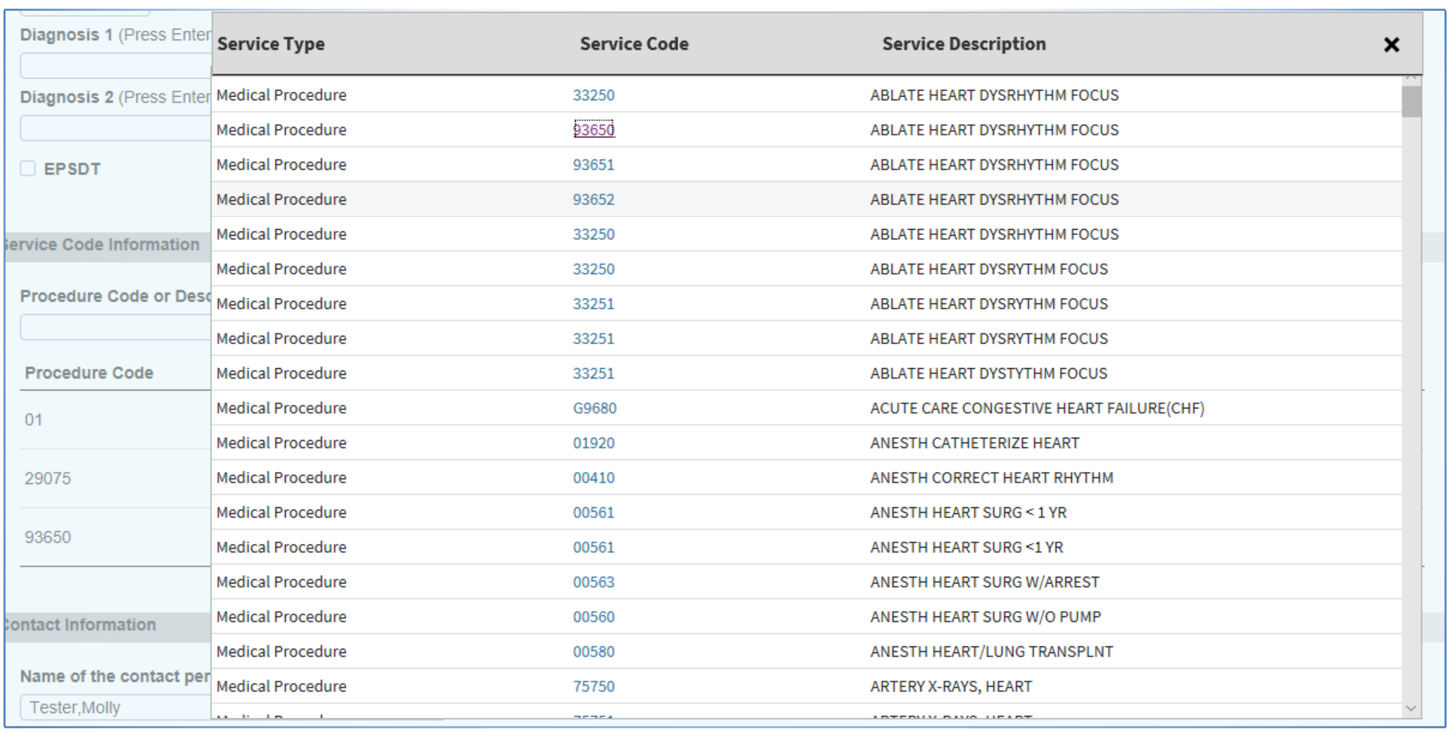


Figure 9-12, Service Code Overlay

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.

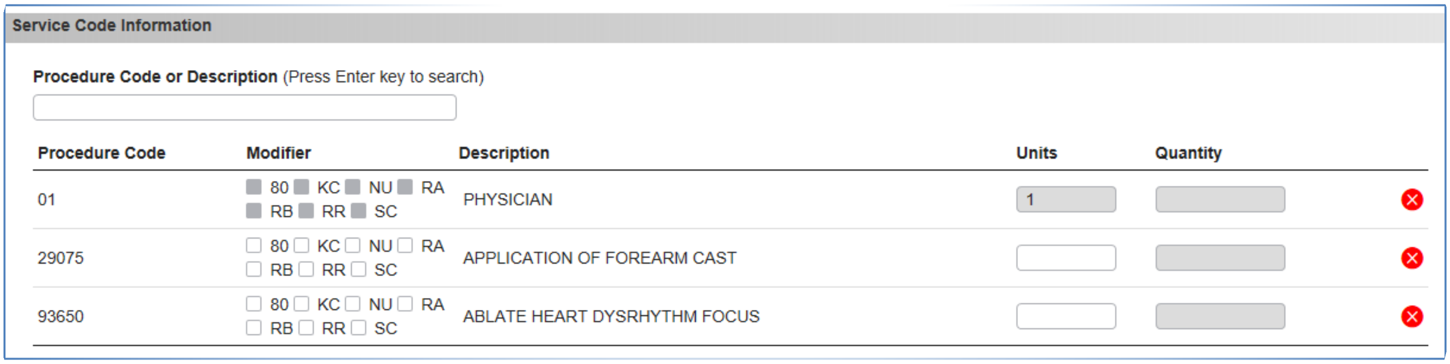


Figure 9-13, Service Code Displays

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.

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

Contact Information

11)Complete the **Contact Information** section.

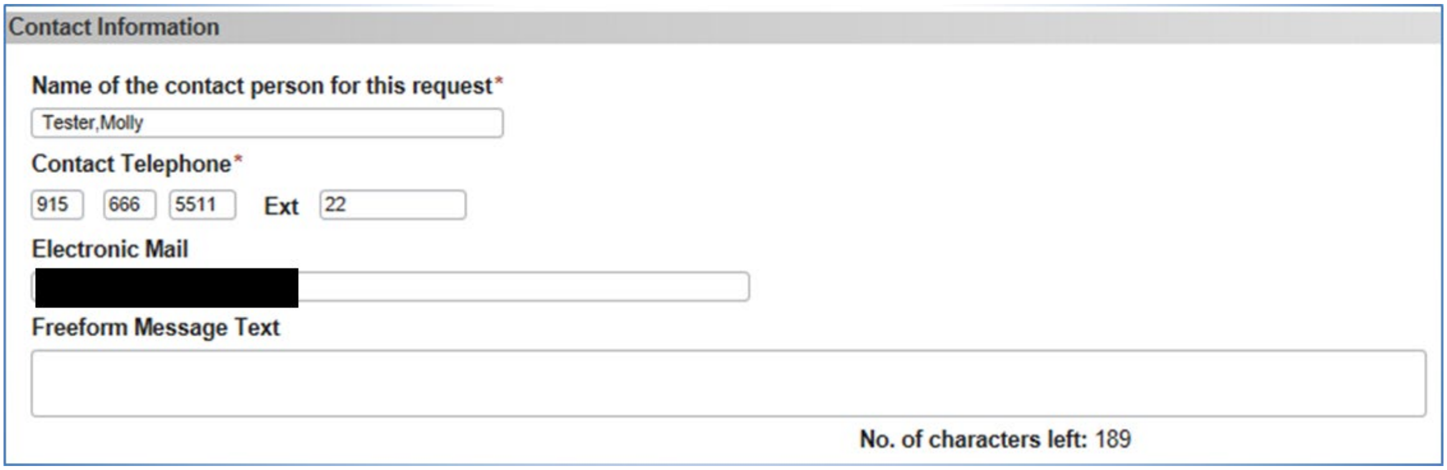


Figure 9-14, Contact Information

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 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.

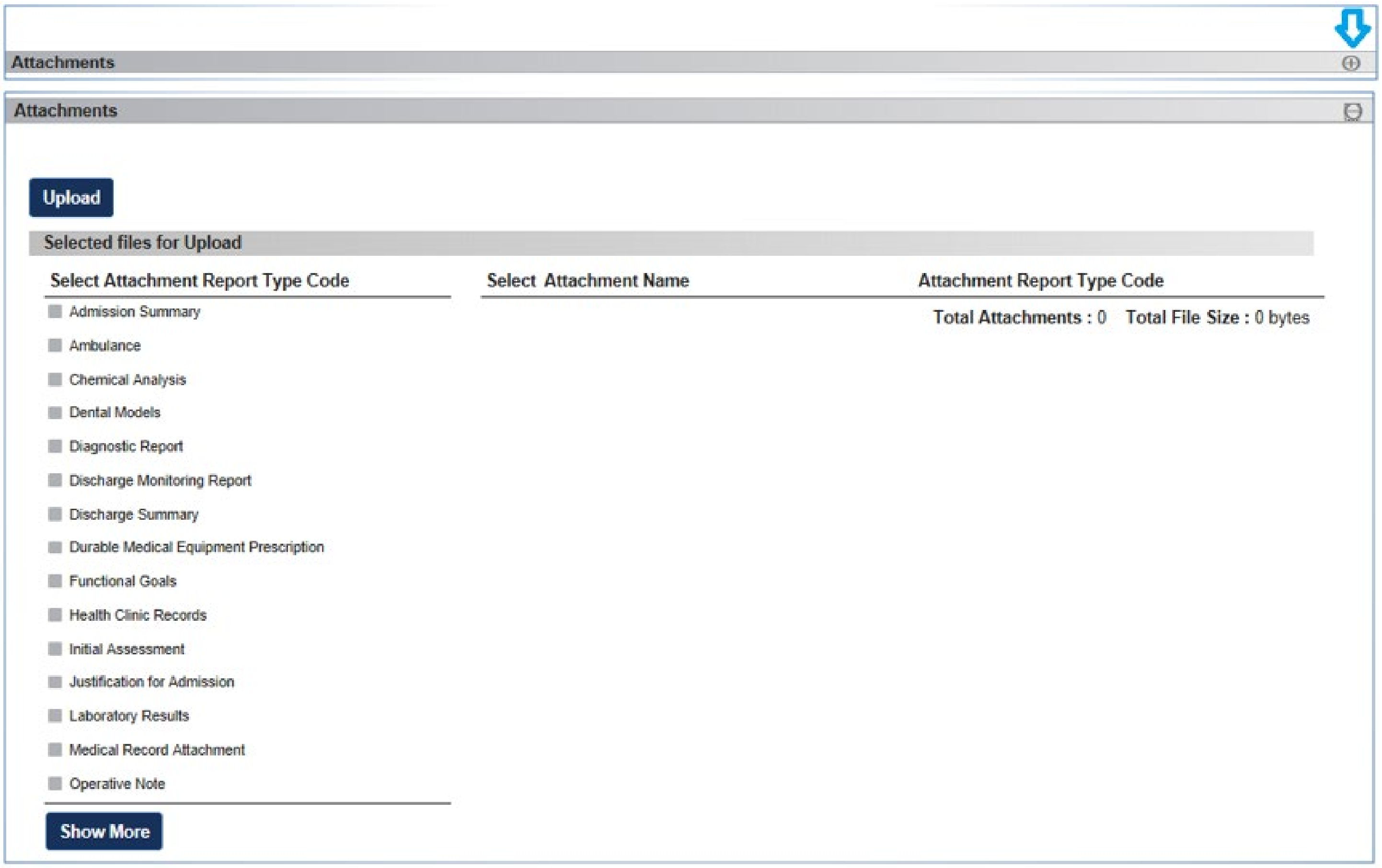


Figure 9-15, Attachments

Click *Upload* button to select an attachment.

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

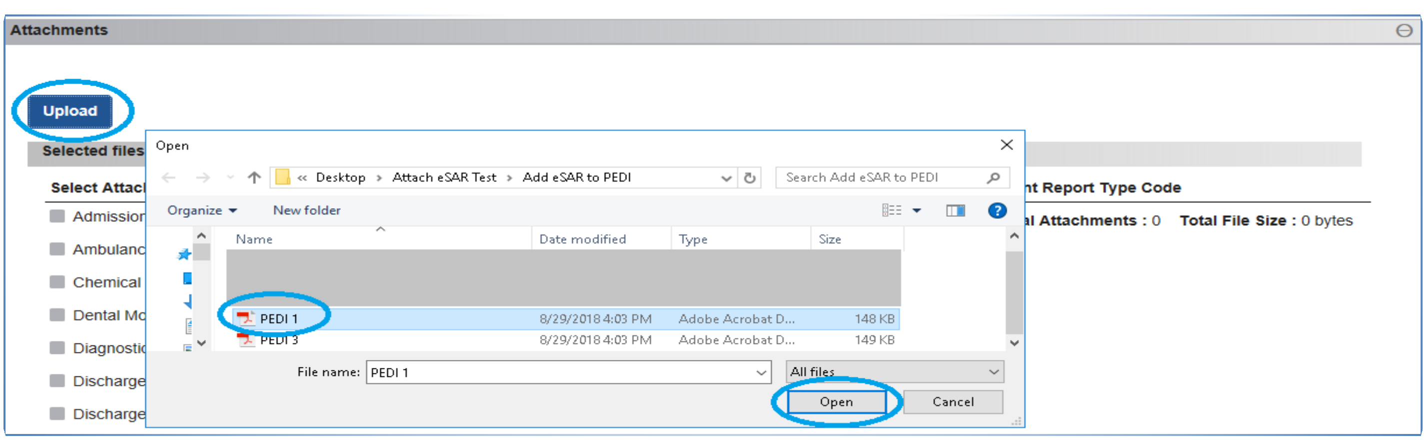


Figure 9-16, Upload Attachments

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.

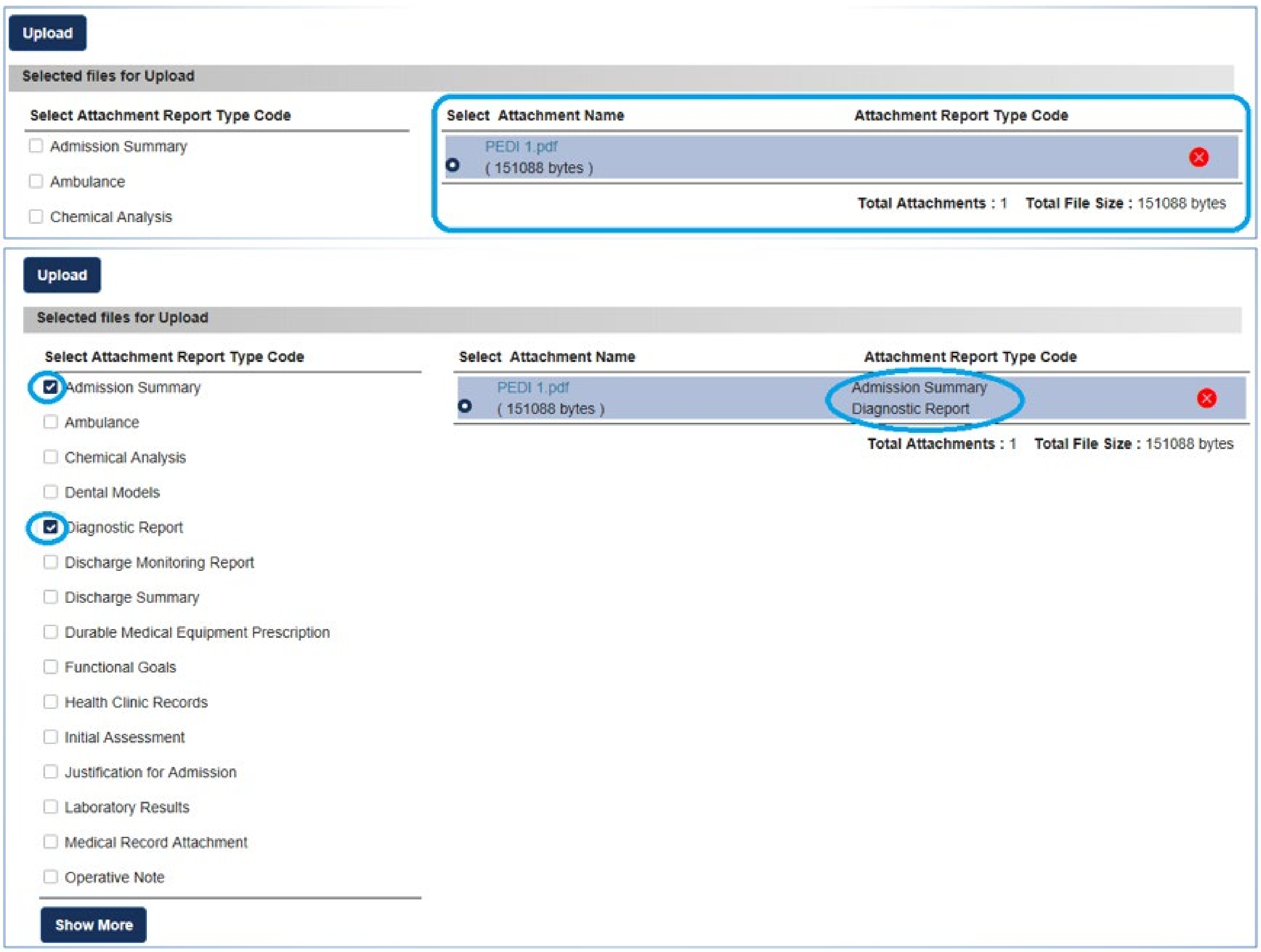


Figure 9-17, Attachment Report Type

When you are finished with the SAR Fillable Form, click **Submit** button to submit the service request.

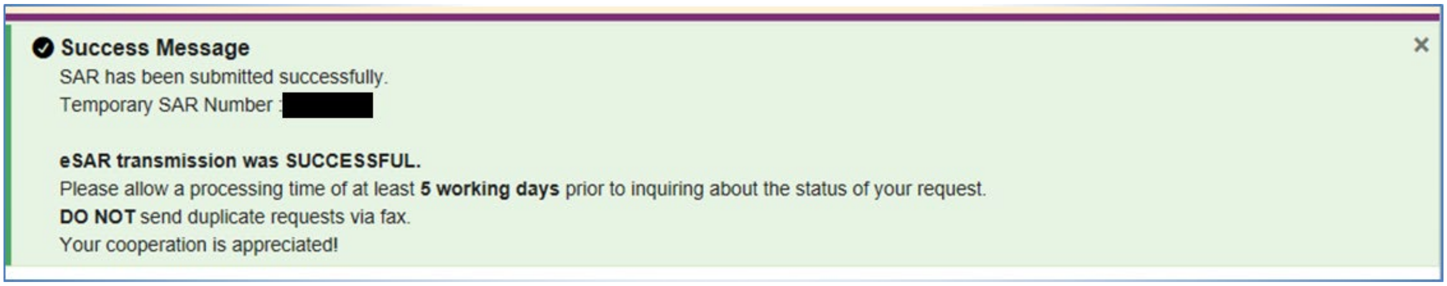


Figure 9-18, Success Message

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.

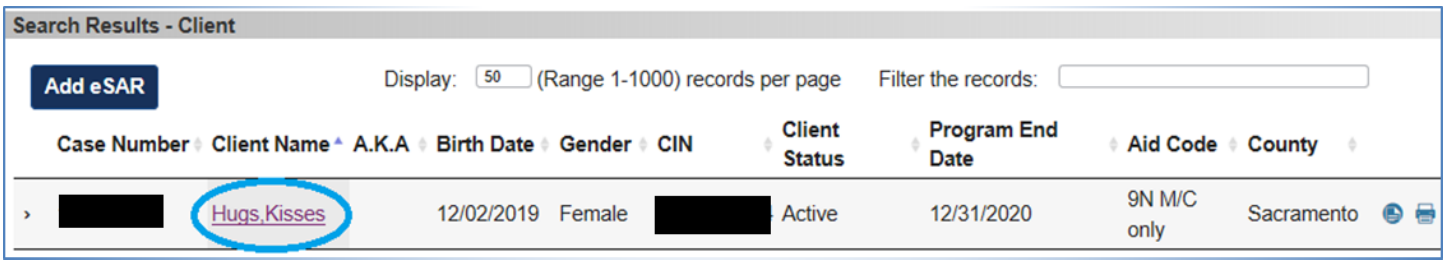


Figure 9-19, Search Results - Client

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.

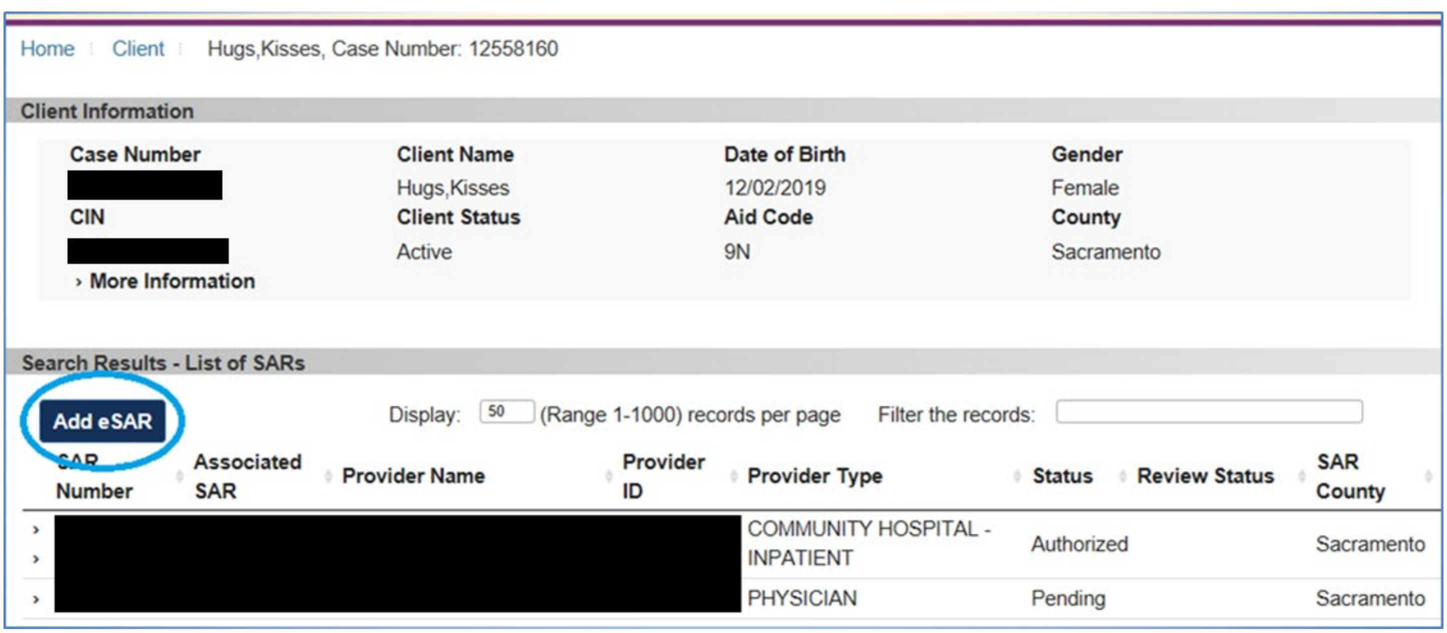
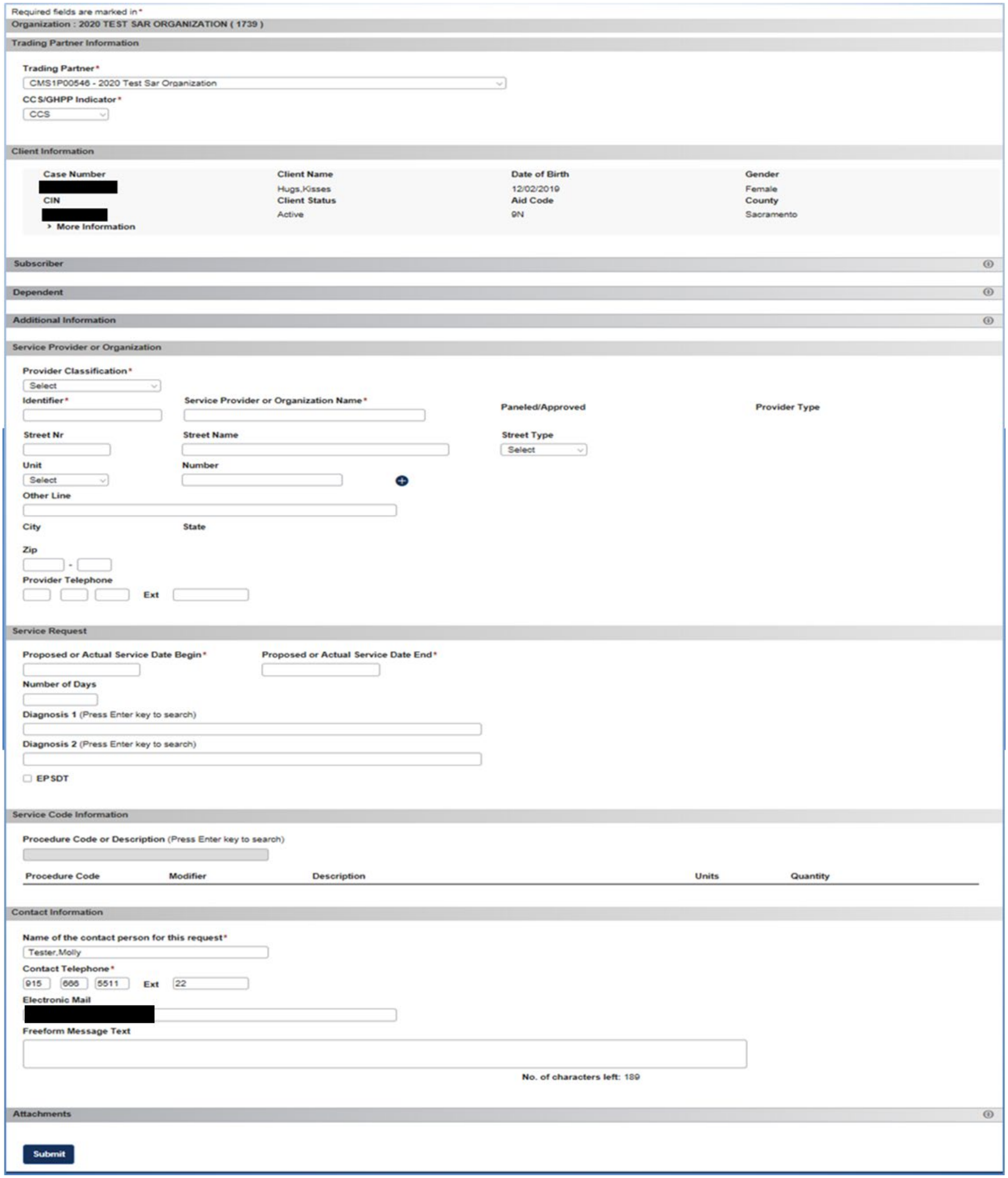


Figure 9-20, Add eSAR

SAR Fillable Form: Trading Partner & Client Information

The system navigates user to the SAR Fillable Form.

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



Required fields are marked in *

Organization : 2020 TEST SAR ORGANIZATION (1739)

Trading Partner Information

Trading Partner *

CMS1P00546 - 2020 Test Sar Organization

CCS/GHPP Indicator *

CCS

Client Information

Case Number	Client Name	Date of Birth	Gender
[redacted]	Hugs,Kisses	12/02/2019	Female
CIN	Client Status	Aid Code	County
[redacted]	Active	9N	Sacramento

› More Information

Subscriber

Dependent

Additional Information

Service Provider or Organization

Provider Classification *

Select

Identifier *

Service Provider or Organization Name *

Paneled/Approved

Provider Type

Street Nr

Street Name

Street Type

Select

Unit

Select

Number

Other Line

City

State

Zip

Provider Telephone

Ext

Service Request

Proposed or Actual Service Date Begin *

Proposed or Actual Service Date End *

Number of Days

Diagnosis 1 (Press Enter key to search)

Diagnosis 2 (Press Enter key to search)

EPSDT

Service Code Information

Procedure Code or Description (Press Enter key to search)

Procedure Code	Modifier	Description	Units	Quantity

Contact Information

Name of the contact person for this request *

Tester,Molly

Contact Telephone *

915 666 5511 Ext 22

Electronic Mail

[redacted]

Freeform Message Text

No. of characters left: 189

Attachments

Submit

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.

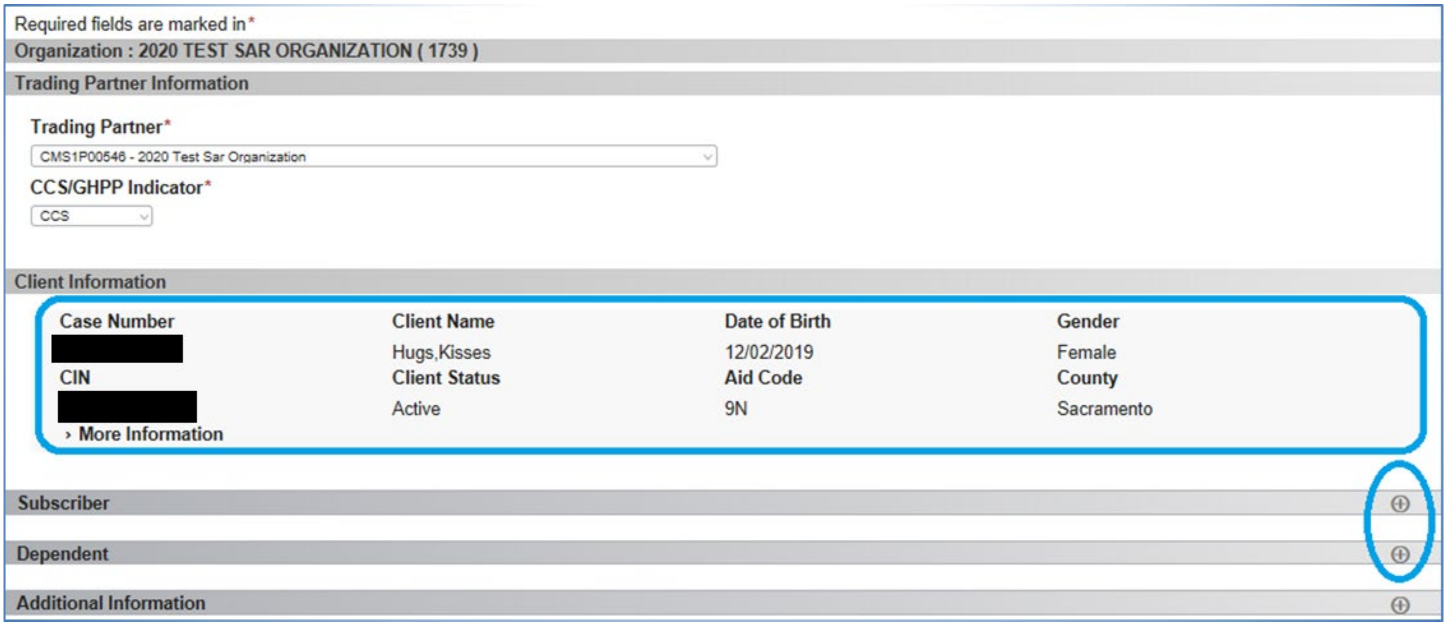


Figure 9-22, Client Information

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.

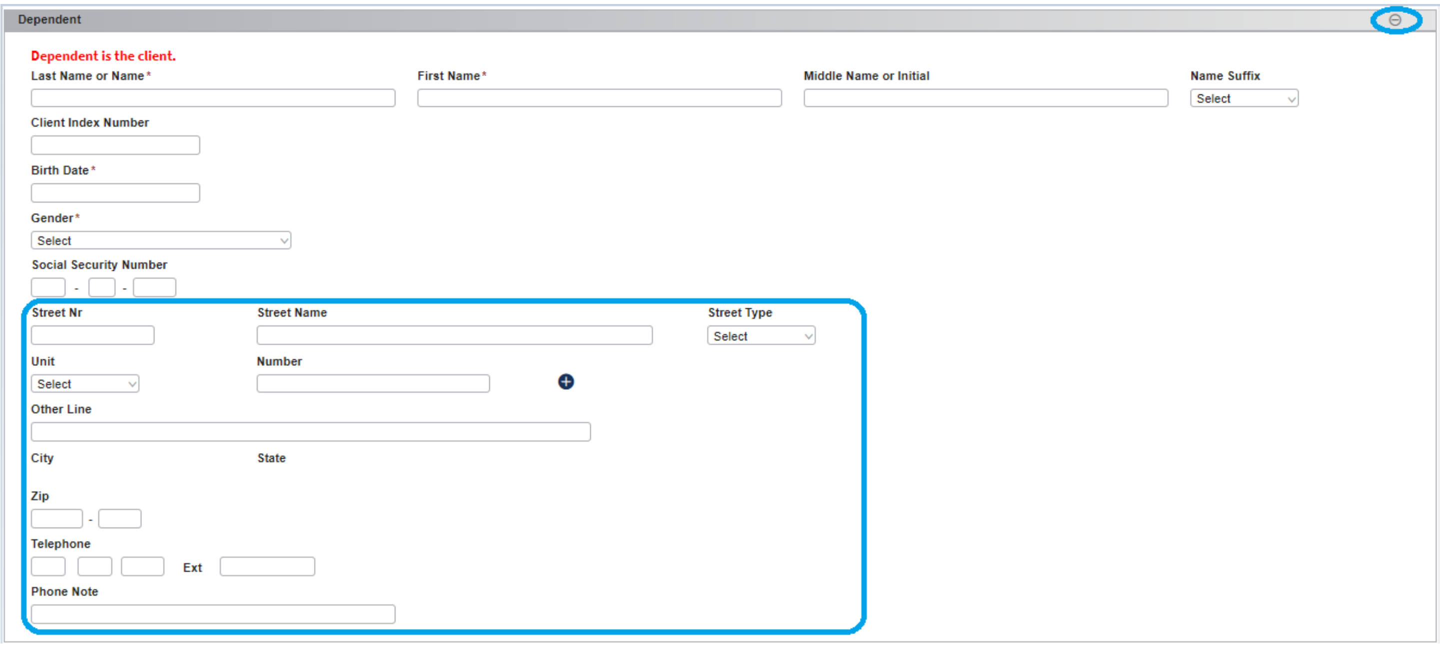


Figure 9-23, Dependent

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.

Service Provider or Organization

5) Complete the **Service Provider or Organization** section.

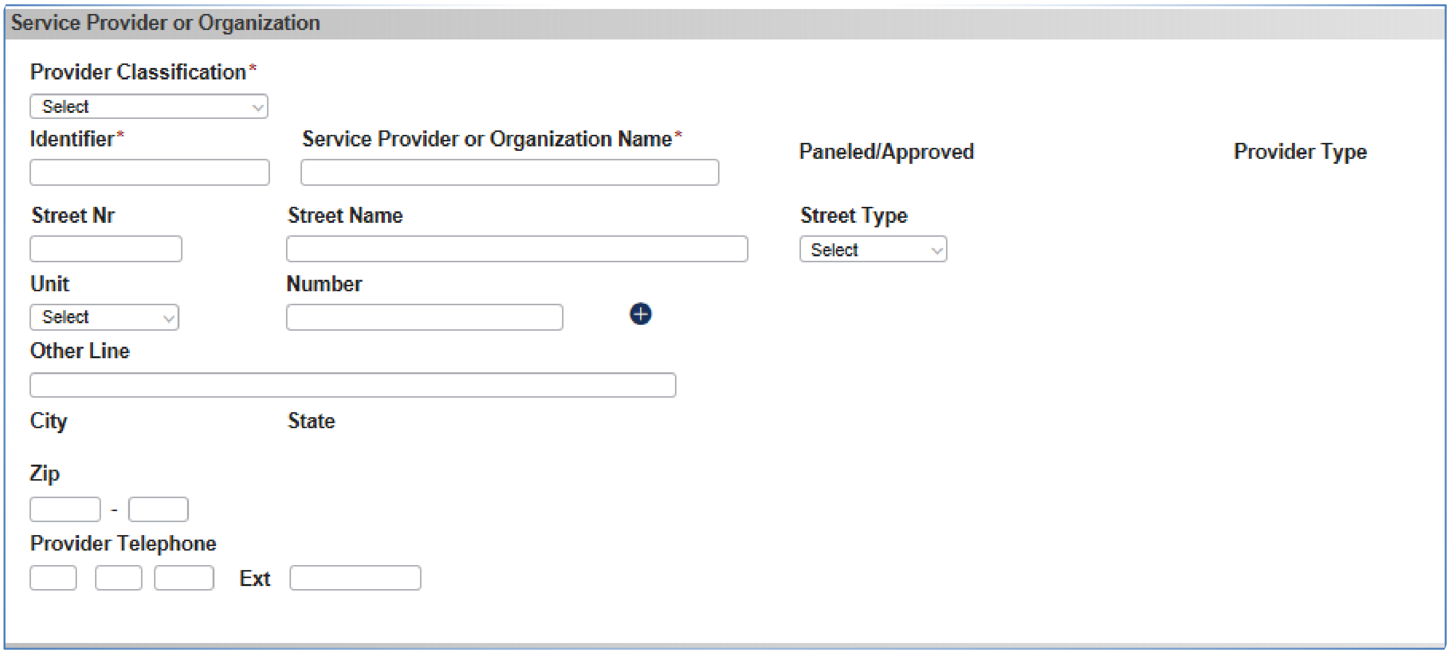


Figure 9-24, Service Provider or Organization

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.

Service Request

6) Complete the **Service Request** section.

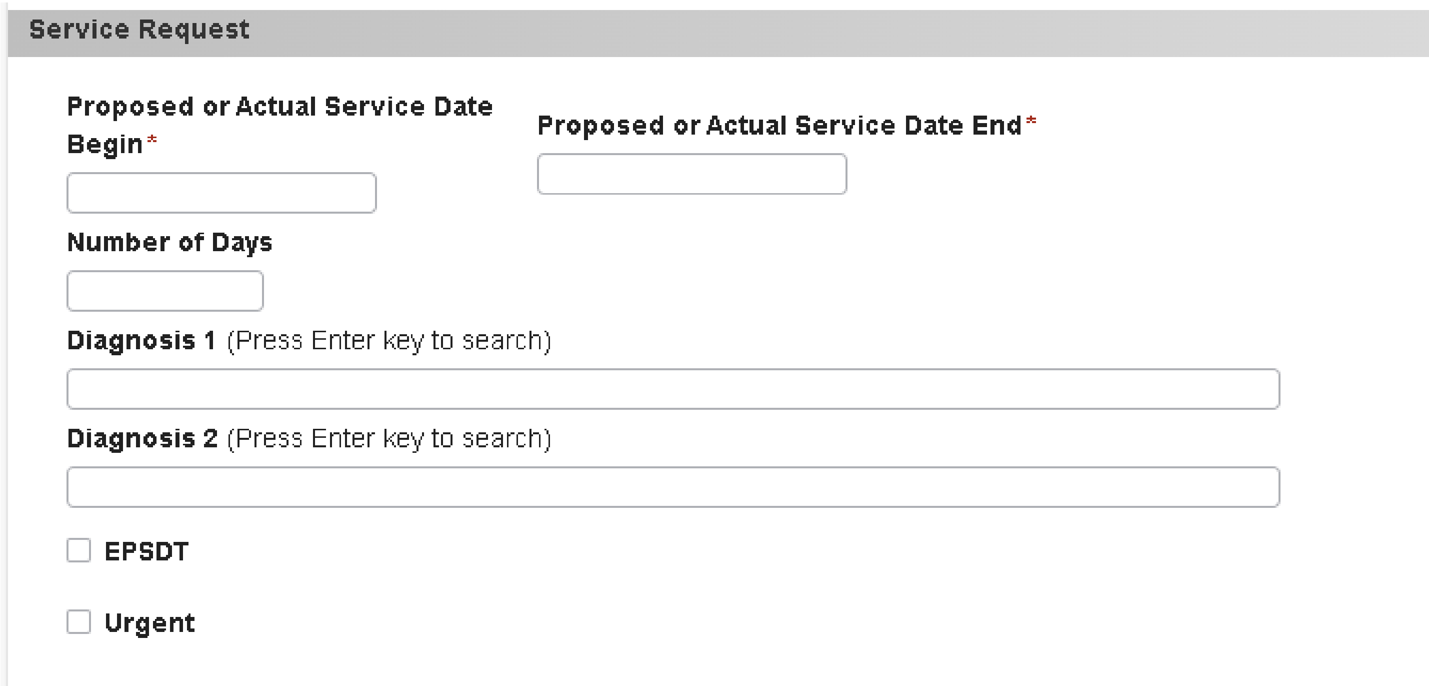


Figure 9-25, Service Request

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.

Urgent: This is an optional checkbox field. This field flags the SAR as an authorization for urgent review.

Service Code Information

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

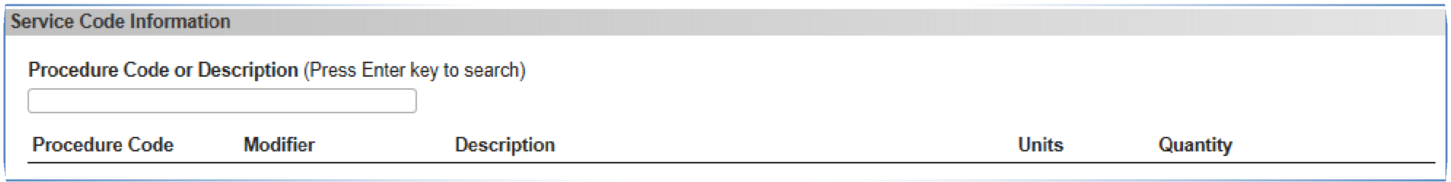
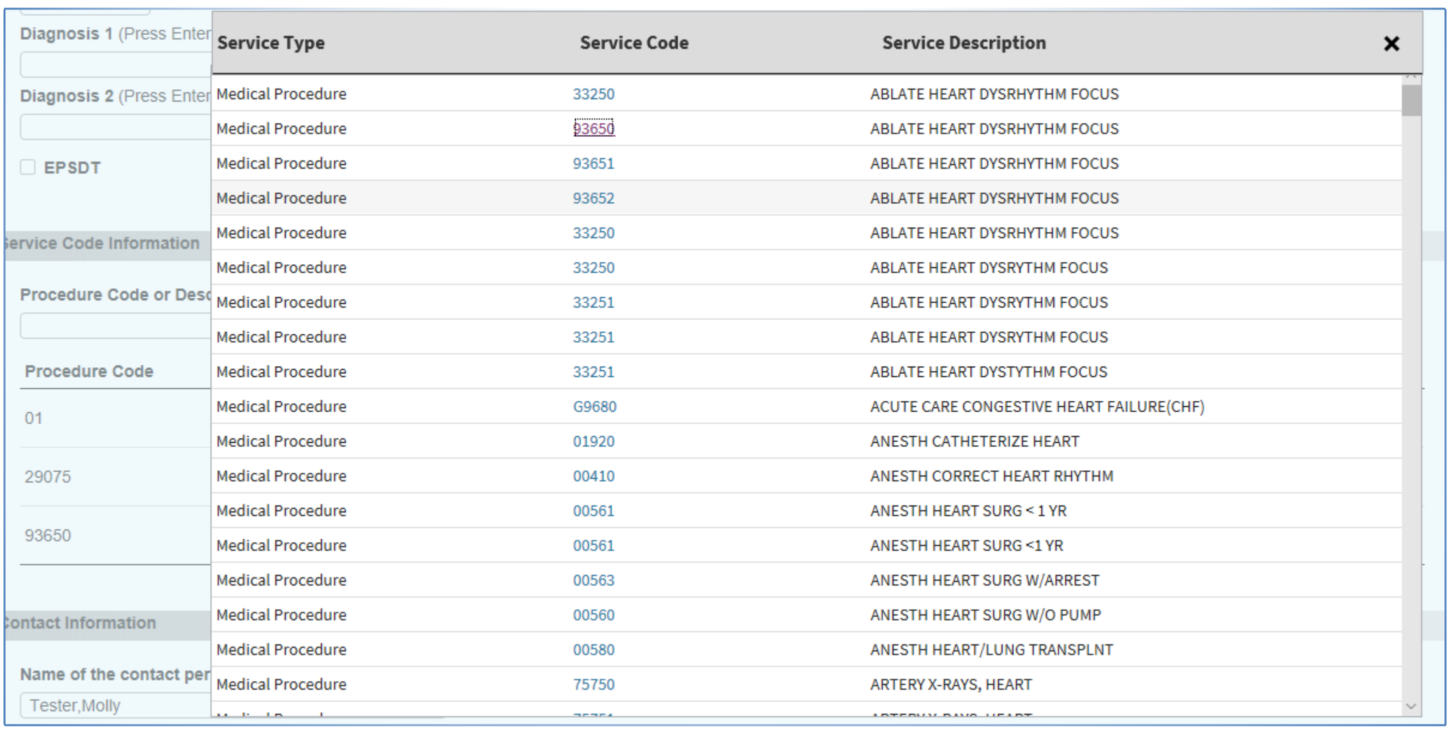


Figure 9-26, Service Code Information

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.

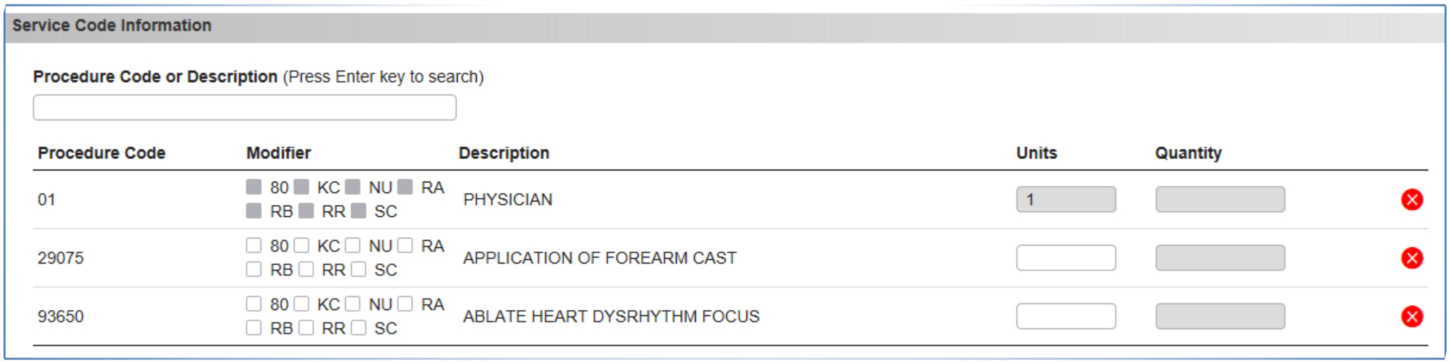


Service Type	Service Code	Service Description
Medical Procedure	33250	ABLATE HEART DYSRHYTHM FOCUS
Medical Procedure	93650	ABLATE HEART DYSRHYTHM FOCUS
Medical Procedure	93651	ABLATE HEART DYSRHYTHM FOCUS
Medical Procedure	93652	ABLATE HEART DYSRHYTHM FOCUS
Medical Procedure	33250	ABLATE HEART DYSRHYTHM FOCUS
Medical Procedure	33250	ABLATE HEART DYSRYTHM FOCUS
Medical Procedure	33251	ABLATE HEART DYSRYTHM FOCUS
Medical Procedure	33251	ABLATE HEART DYSRYTHM FOCUS
Medical Procedure	33251	ABLATE HEART DYSTYTHM FOCUS
Medical Procedure	G9680	ACUTE CARE CONGESTIVE HEART FAILURE(CHF)
Medical Procedure	01920	ANESTH CATHETERIZE HEART
Medical Procedure	00410	ANESTH CORRECT HEART RHYTHM
Medical Procedure	00561	ANESTH HEART SURG < 1 YR
Medical Procedure	00561	ANESTH HEART SURG <1 YR
Medical Procedure	00563	ANESTH HEART SURG W/ARREST
Medical Procedure	00560	ANESTH HEART SURG W/O PUMP
Medical Procedure	00580	ANESTH HEART/LUNG TRANSPLNT
Medical Procedure	75750	ARTERY X-RAYS, HEART

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.


Service Code Information

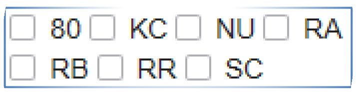
Procedure Code or Description (Press Enter key to search)

Procedure Code	Modifier	Description	Units	Quantity
01	80 KC NU RA RB RR SC	PHYSICIAN	1	
29075	80 KC NU RA RB RR SC	APPLICATION OF FOREARM CAST		
93650	80 KC NU RA RB RR SC	ABLATE HEART DYSRHYTHM FOCUS		

Figure 9-28, Service Code Displays

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

Contact Information

8) Complete the **Contact Information** section.

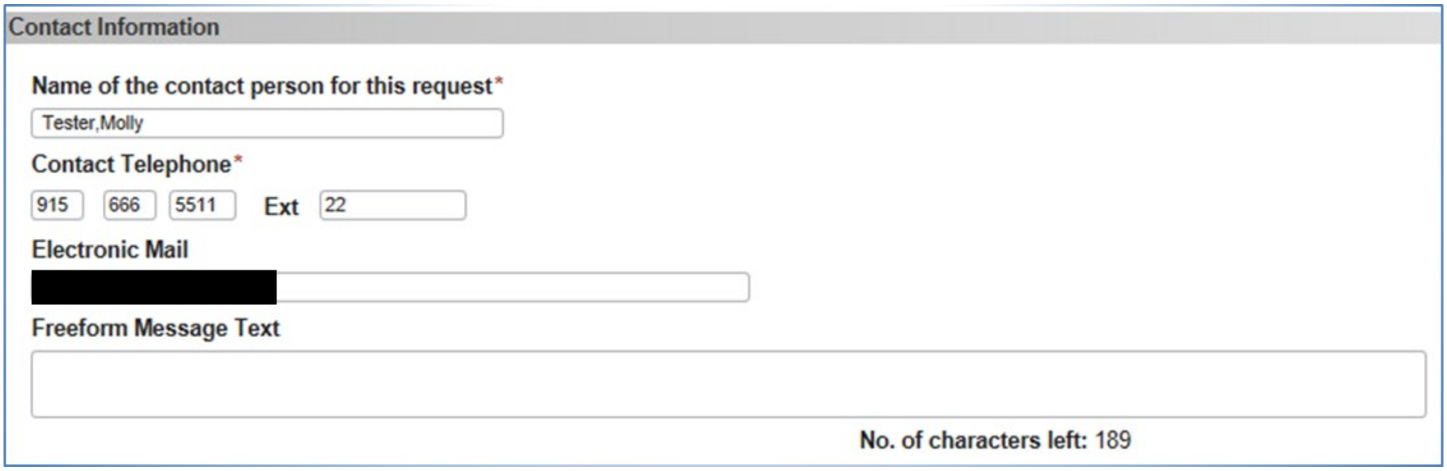


Figure 9-29, Contact Information

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.

Attachments

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

Click the + to expand/open the Attachments sections.

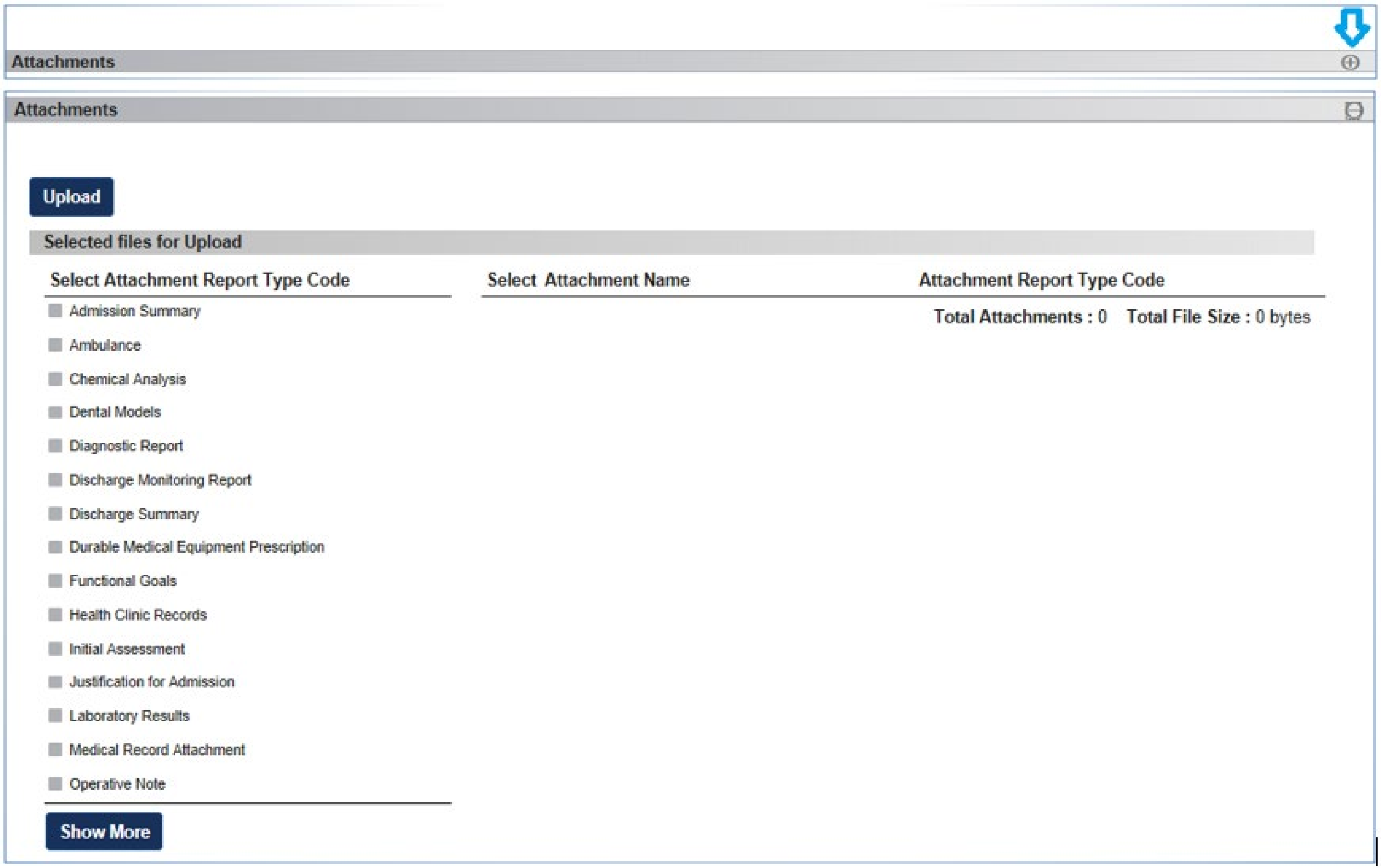


Figure 9-30, Attachments

Click *Upload* button to select an attachment.

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

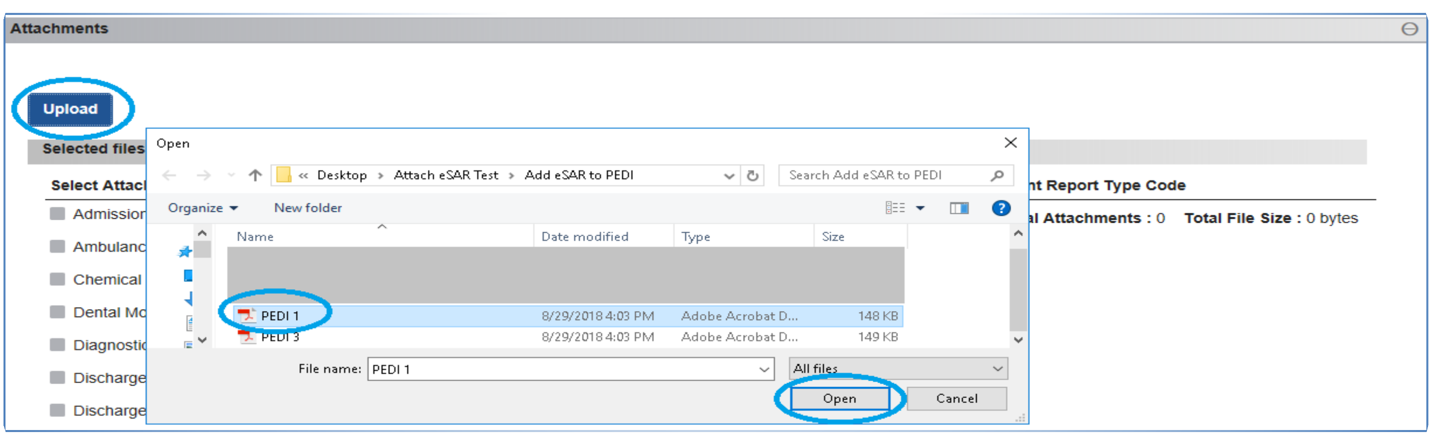


Figure 9-31, Upload Attachment

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.

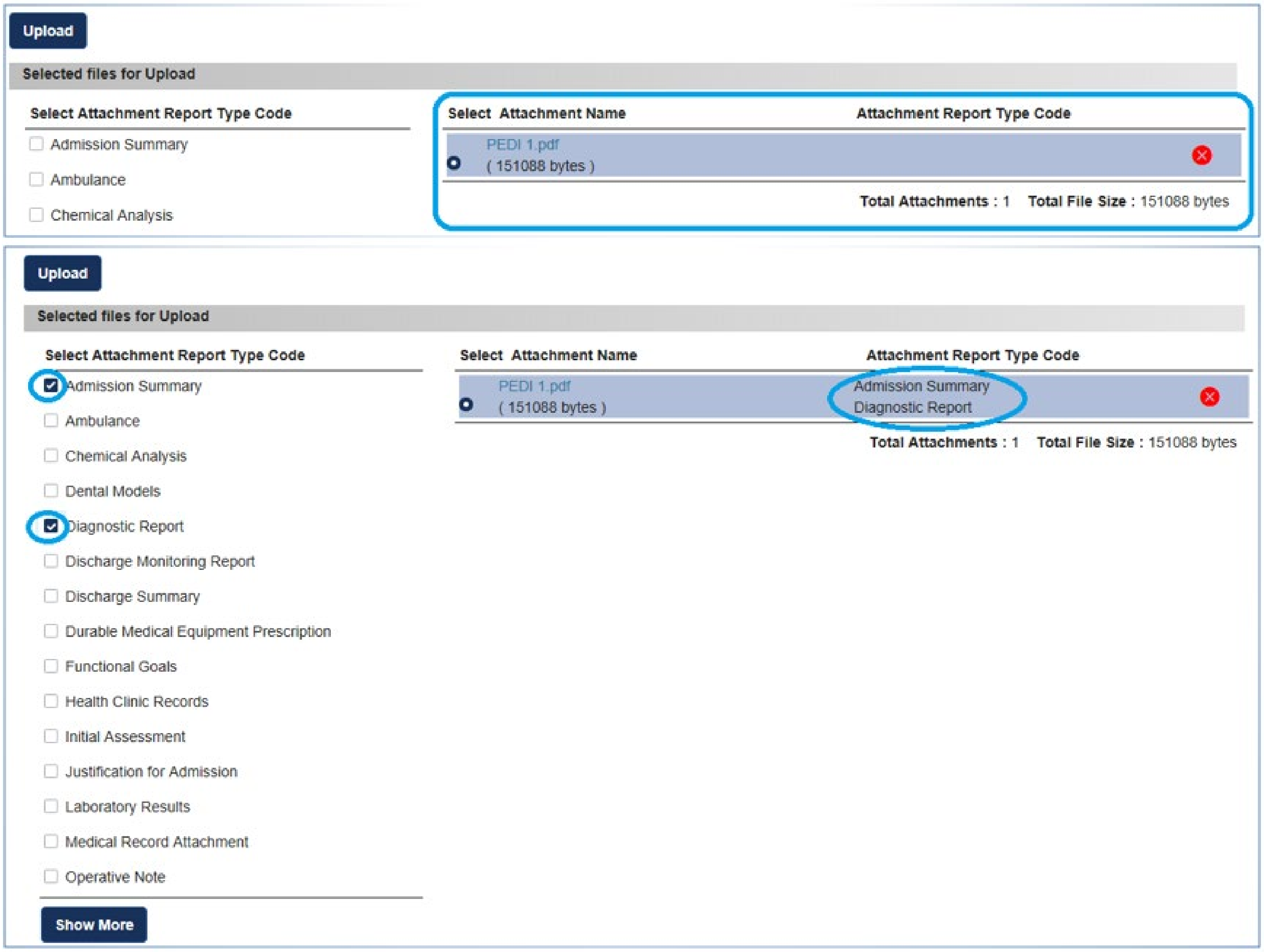


Figure 9-32, Upload Attachment

When you are finished with the SAR Fillable Form, click **Submit** button to submit service request.

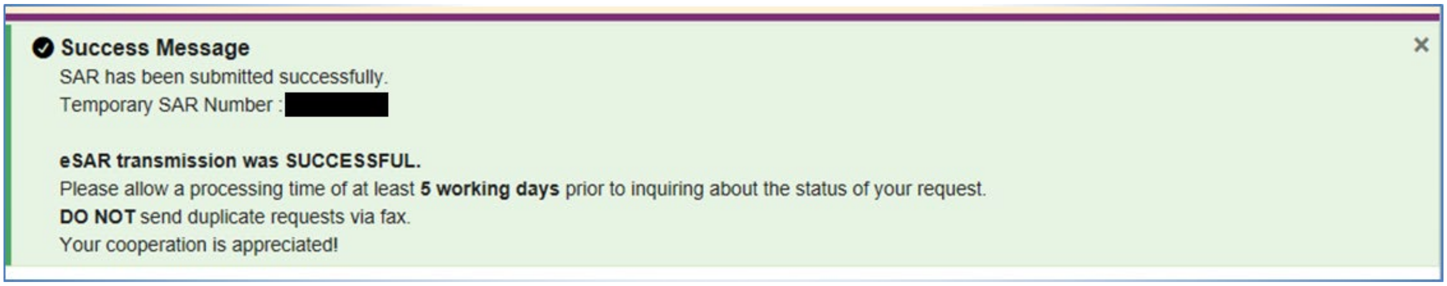


Figure 9-33, Success Message

9.3 SAR Modification Request

This section shows you how to a 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.

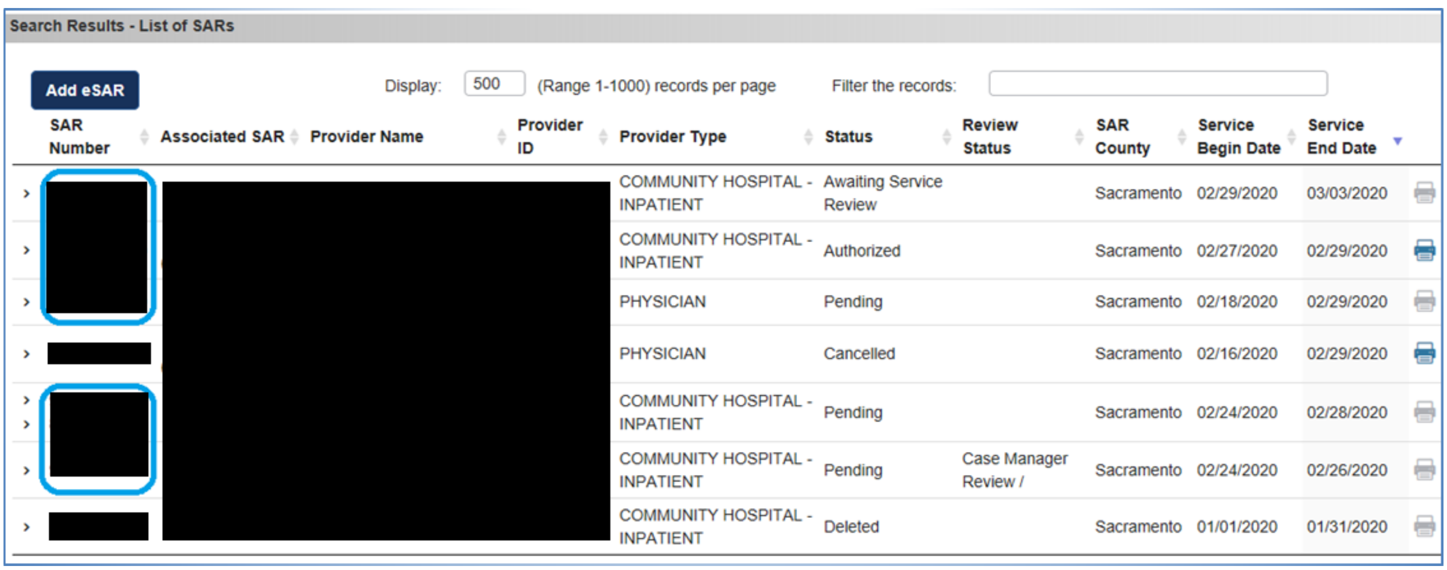
Users may request for a SAR modification to an existing request with an eSAR temporary number (ex: 7793645) in Awaiting Service Request or to an 11 digit SAR in Pending status or Authorized status.

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.



Search Results - List of SARs

Add eSAR

Display: 500 (Range 1-1000) records per page

Filter the records:

SAR Number	Associated SAR	Provider Name	Provider ID	Provider Type	Status	Review Status	SAR County	Service Begin Date	Service End Date
[redacted]	[redacted]	[redacted]	[redacted]	COMMUNITY HOSPITAL - INPATIENT	Awaiting Service Review		Sacramento	02/29/2020	03/03/2020
[redacted]	[redacted]	[redacted]	[redacted]	COMMUNITY HOSPITAL - INPATIENT	Authorized		Sacramento	02/27/2020	02/29/2020
[redacted]	[redacted]	[redacted]	[redacted]	PHYSICIAN	Pending		Sacramento	02/18/2020	02/29/2020
[redacted]	[redacted]	[redacted]	[redacted]	PHYSICIAN	Cancelled		Sacramento	02/16/2020	02/29/2020
[redacted]	[redacted]	[redacted]	[redacted]	COMMUNITY HOSPITAL - INPATIENT	Pending		Sacramento	02/24/2020	02/28/2020
[redacted]	[redacted]	[redacted]	[redacted]	COMMUNITY HOSPITAL - INPATIENT	Pending	Case Manager Review /	Sacramento	02/24/2020	02/26/2020
[redacted]	[redacted]	[redacted]	[redacted]	COMMUNITY HOSPITAL - INPATIENT	Deleted		Sacramento	01/01/2020	01/31/2020

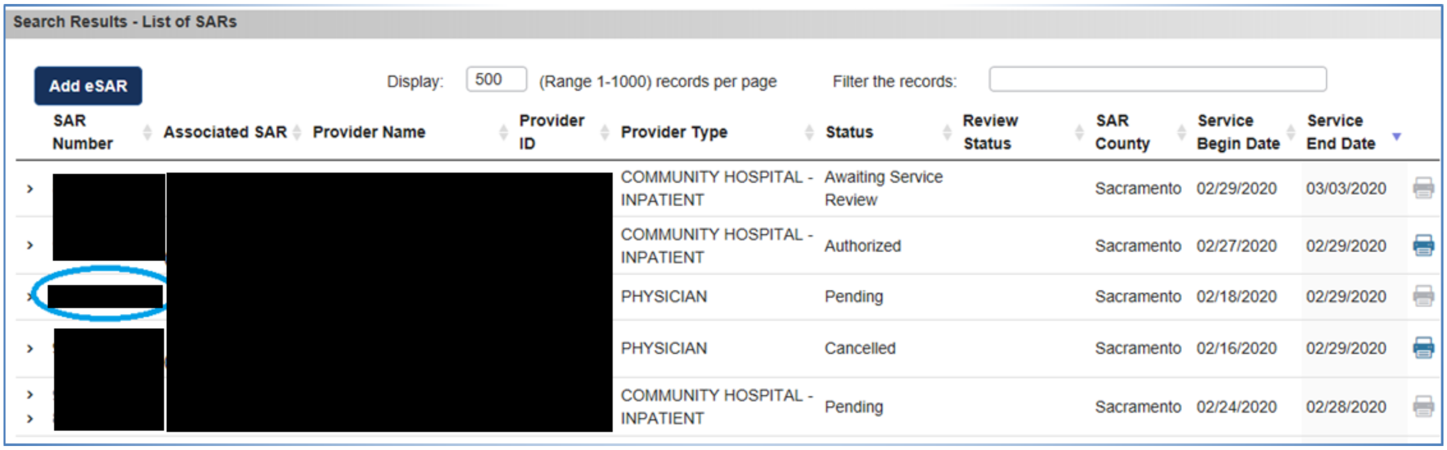
Figure 9-34, SAR Number Column

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.

Select SAR

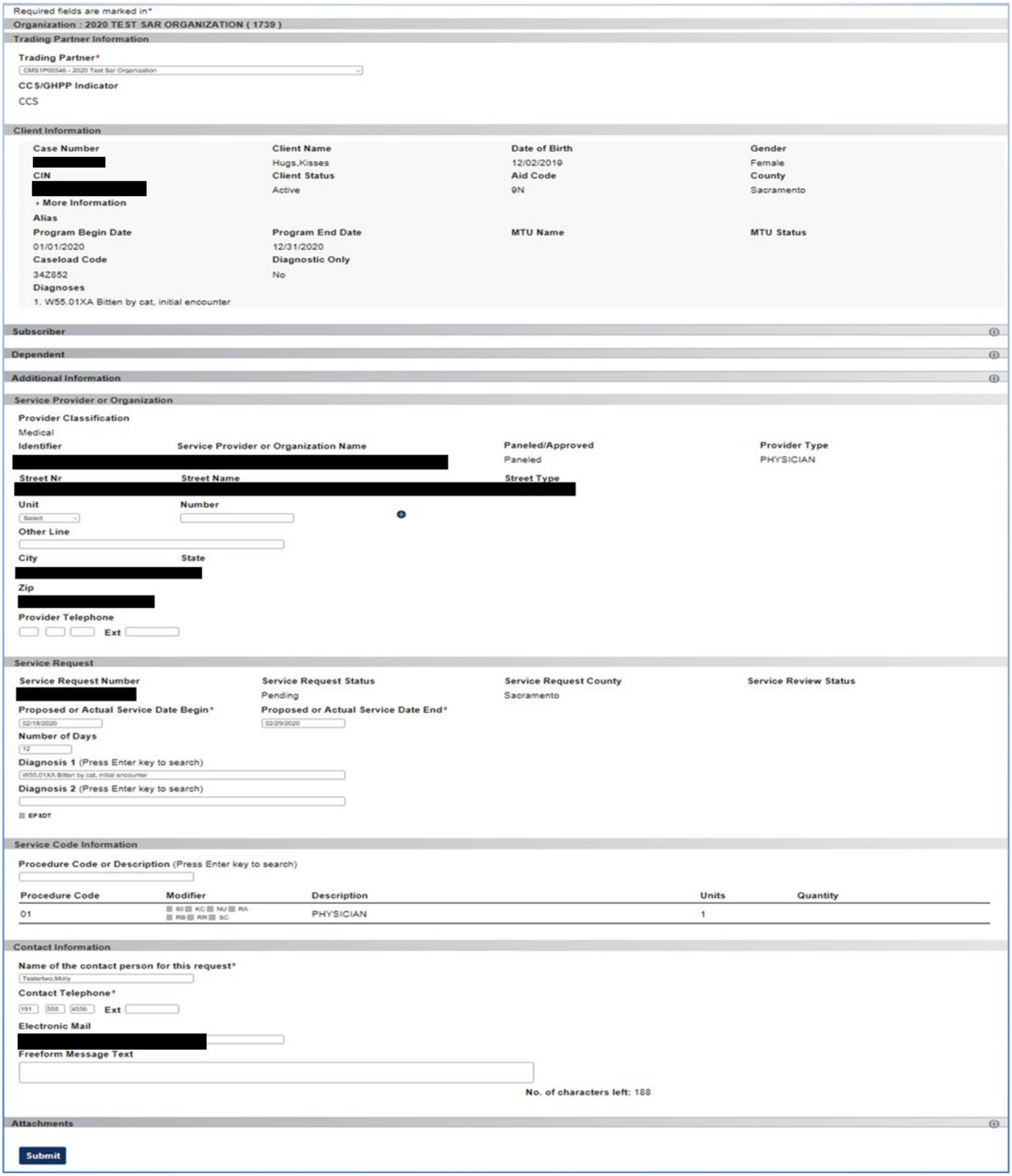
2) To modify a SAR, click on the SAR number hyperlink of the SAR you want to modify.



SAR Number	Associated SAR	Provider Name	Provider ID	Provider Type	Status	Review Status	SAR County	Service Begin Date	Service End Date
[redacted]				COMMUNITY HOSPITAL - INPATIENT	Awaiting Service Review		Sacramento	02/29/2020	03/03/2020
				COMMUNITY HOSPITAL - INPATIENT	Authorized		Sacramento	02/27/2020	02/29/2020
				PHYSICIAN	Pending		Sacramento	02/18/2020	02/29/2020
				PHYSICIAN	Cancelled		Sacramento	02/16/2020	02/29/2020
				COMMUNITY HOSPITAL - INPATIENT	Pending		Sacramento	02/24/2020	02/28/2020

Figure 9-35, SAR Number - Hyperlink

3) System will take you to the selected SAR. Enter your modification request on the fillable form.



Required fields are marked in*

Organization : 2020 TEST SAR ORGANIZATION (1739)

Trading Partner Information

Trading Partner*

CMS1P00546 - 2020 Test Sar Organization

CCS/GHPP Indicator

CCS

Client Information

Case Number	Client Name	Date of Birth	Gender
[redacted]	Hugs,Kisses	12/02/2019	Female
CIN	Client Status	Aid Code	County
[redacted]	Active	9N	Sacramento

› More Information

Alias

Program Begin Date	Program End Date	MTU Name	MTU Status
01/01/2020	12/31/2020		
Caseload Code	Diagnostic Only		
34Z852	No		

Diagnoses

1. W55.01XA Bitten by cat, initial encounter

Subscriber

Dependent

Additional Information

Service Provider or Organization

Provider Classification

Medical

Identifier	Service Provider or Organization Name	Paneled/Approved	Provider Type
[redacted]		Paneled	PHYSICIAN

Street Nr | Street Name | Street Type

[redacted]

Unit: Select | Number

Other Line

City | State

[redacted]

Zip

[redacted]

Provider Telephone

Ext

Service Request

Service Request Number	Service Request Status	Service Request County	Service Review Status
[redacted]	Pending	Sacramento	

Proposed or Actual Service Date Begin*: 02/18/2020

Proposed or Actual Service Date End*: 02/29/2020

Number of Days: 12

Diagnosis 1 (Press Enter key to search): W55.01XA Bitten by cat, initial encounter

Diagnosis 2 (Press Enter key to search)

EPSDT

Service Code Information

Procedure Code or Description (Press Enter key to search)

Procedure Code	Modifier	Description	Units	Quantity
01	80 KC NU RA RB RR SC	PHYSICIAN	1	

Contact Information

Name of the contact person for this request*: Testertwo,Molly

Contact Telephone*: 191 555 4556 Ext

Electronic Mail

[redacted]

Freeform Message Text

No. of characters left: 188

Attachments

Submit

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.

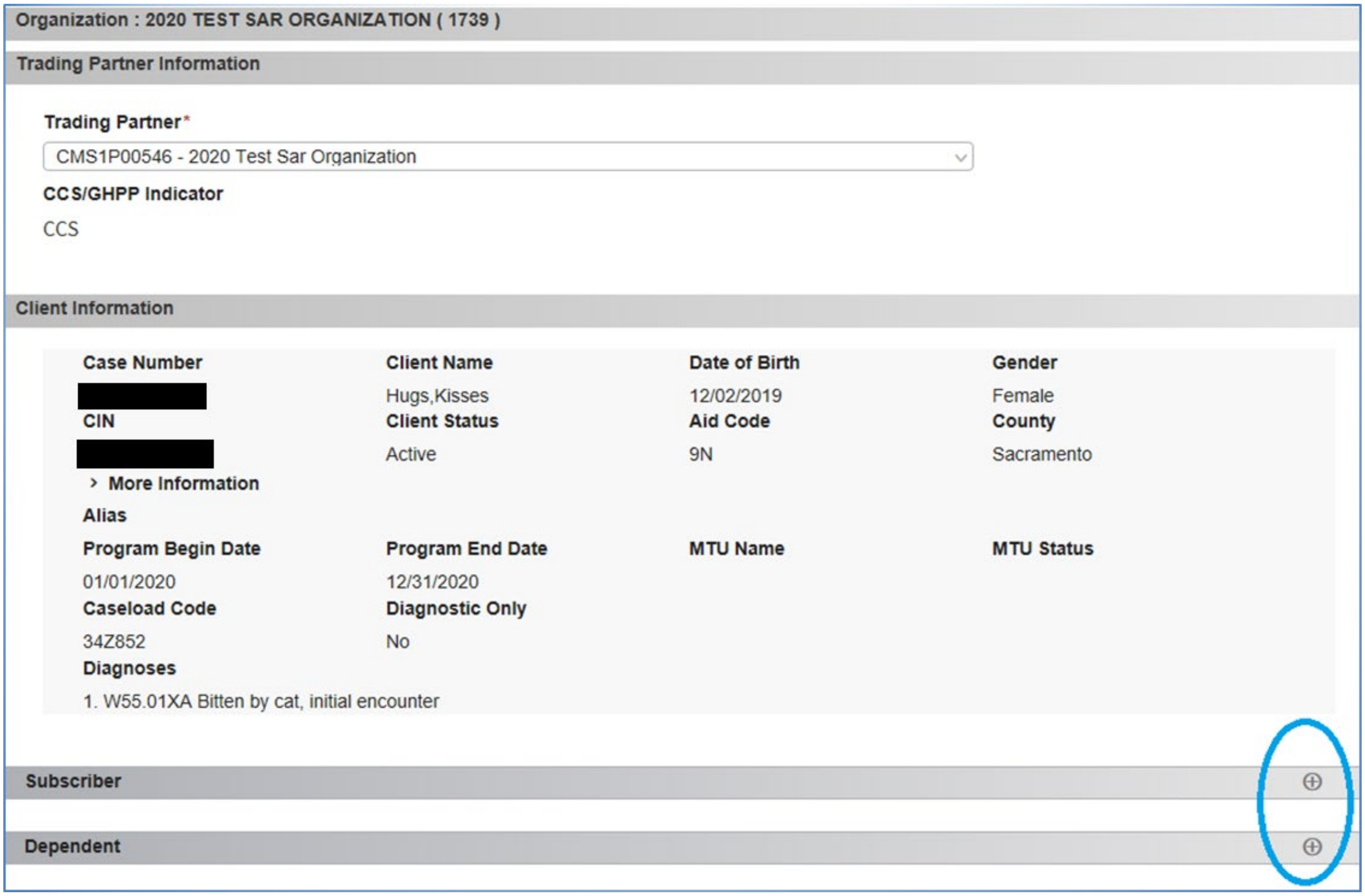
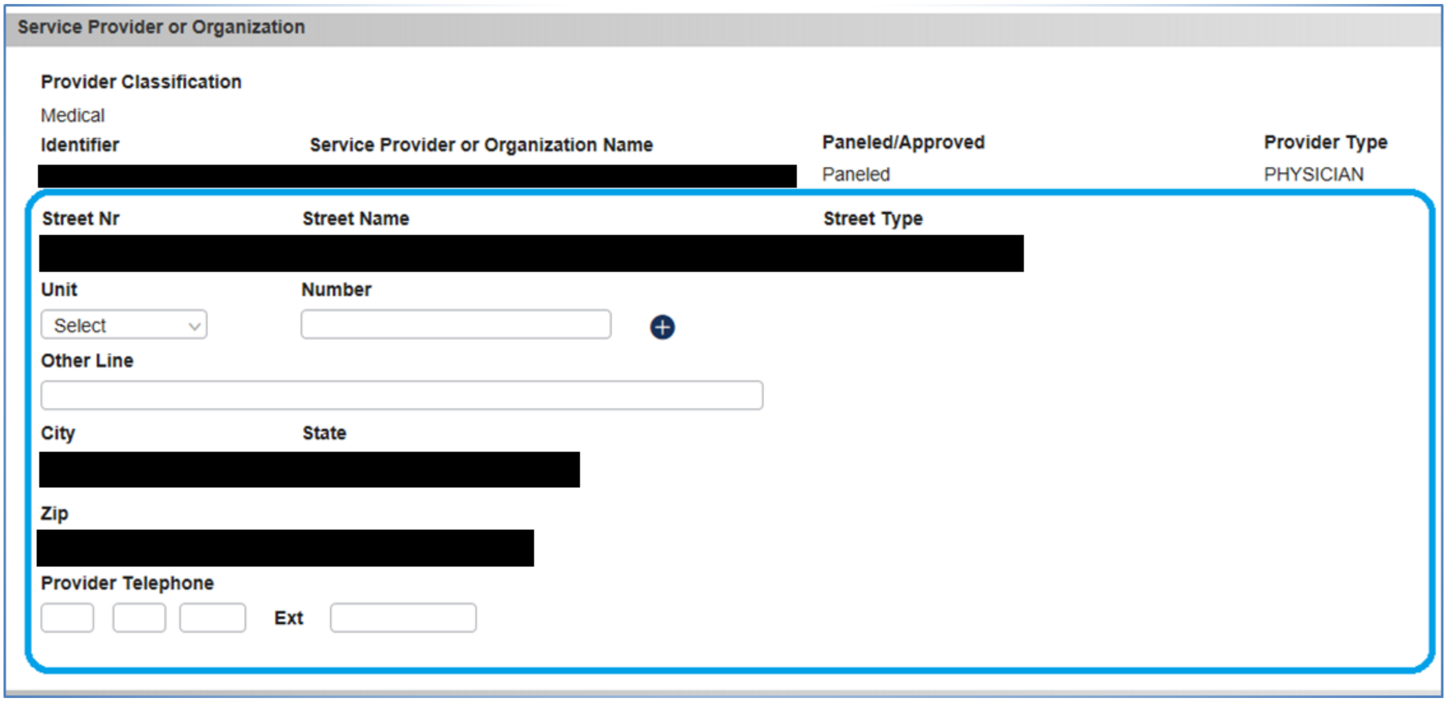


Figure 9-37, Subscriber or Dependent

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.



Service Provider or Organization

Provider Classification

Medical

Identifier | Service Provider or Organization Name | Paneled/Approved | Provider Type

[redacted] Paneled PHYSICIAN

Street Nr | Street Name | Street Type

[redacted]

Unit | Number

Select

Other Line

City | State

[redacted]

Zip

[redacted]

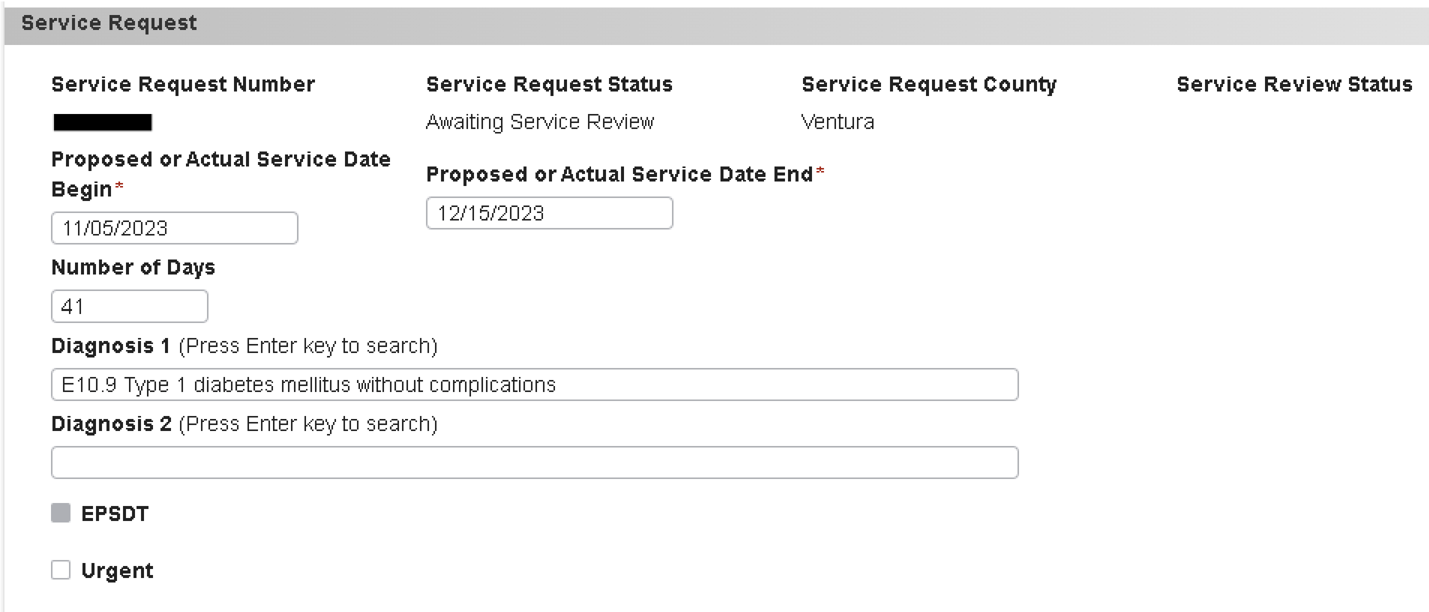
Provider Telephone

Ext

Figure 9-38, Service Provider or Organization

Service Request

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 *Urgent* checkbox can be checked or unchecked.



Service Request

Service Request Number	Service Request Status	Service Request County	Service Review Status
[redacted]	Awaiting Service Review	Ventura	

Proposed or Actual Service Date Begin*
11/05/2023

Proposed or Actual Service Date End*
12/15/2023

Number of Days
41

Diagnosis 1 (Press Enter key to search)
E10.9 Type 1 diabetes mellitus without complications

Diagnosis 2 (Press Enter key to search)

EPSDT

Urgent

Figure 9-39, Service Request

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.

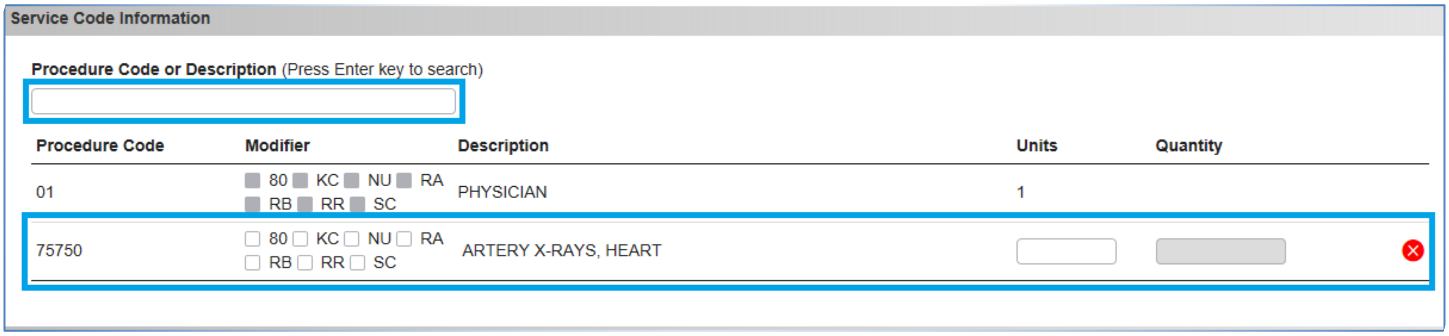
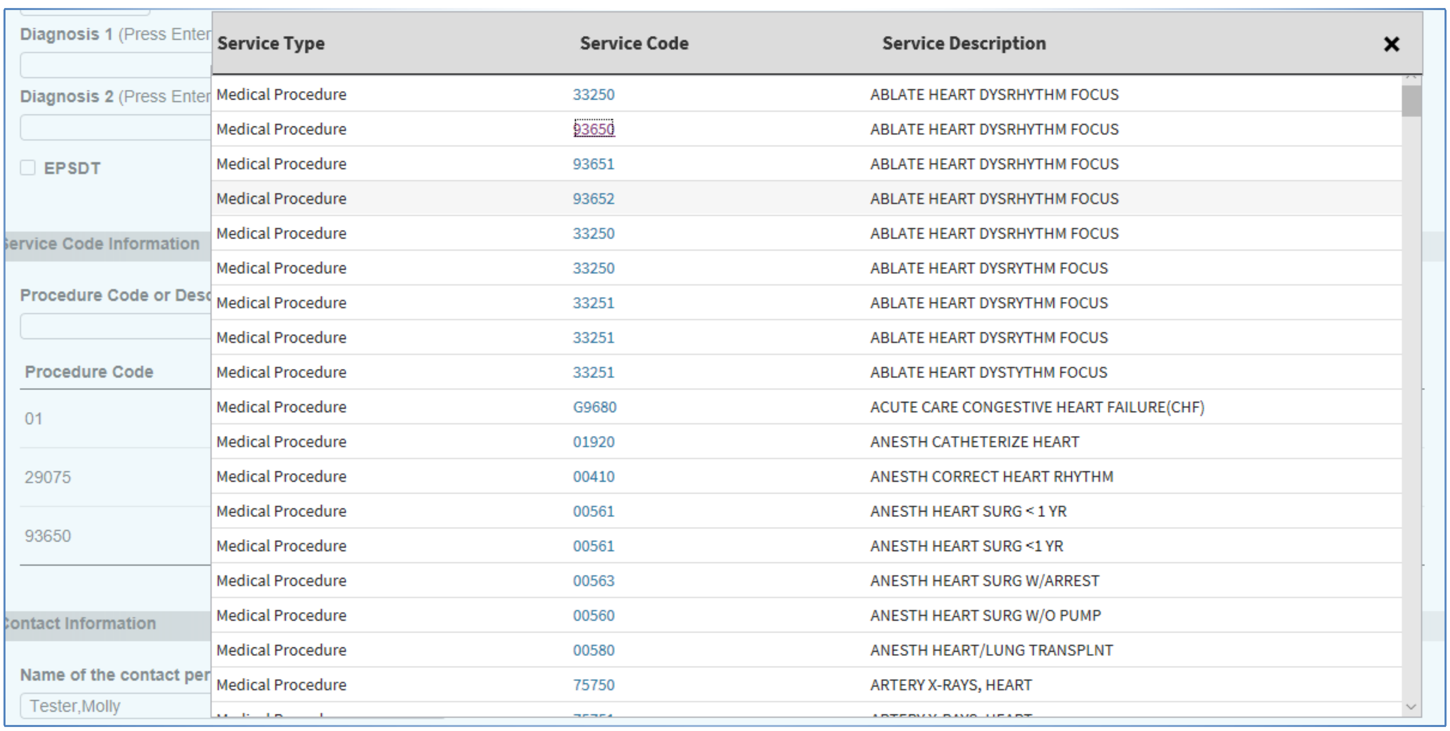


Figure 9-40, Service Code Information

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 Type	Service Code	Service Description
Medical Procedure	33250	ABLATE HEART DYSRHYTHM FOCUS
Medical Procedure	93650	ABLATE HEART DYSRHYTHM FOCUS
Medical Procedure	93651	ABLATE HEART DYSRHYTHM FOCUS
Medical Procedure	93652	ABLATE HEART DYSRHYTHM FOCUS
Medical Procedure	33250	ABLATE HEART DYSRHYTHM FOCUS
Medical Procedure	33250	ABLATE HEART DYSRYTHM FOCUS
Medical Procedure	33251	ABLATE HEART DYSRYTHM FOCUS
Medical Procedure	33251	ABLATE HEART DYSRYTHM FOCUS
Medical Procedure	33251	ABLATE HEART DYSTYTHM FOCUS
Medical Procedure	G9680	ACUTE CARE CONGESTIVE HEART FAILURE(CHF)
Medical Procedure	01920	ANESTH CATHETERIZE HEART
Medical Procedure	00410	ANESTH CORRECT HEART RHYTHM
Medical Procedure	00561	ANESTH HEART SURG < 1 YR
Medical Procedure	00561	ANESTH HEART SURG <1 YR
Medical Procedure	00563	ANESTH HEART SURG W/ARREST
Medical Procedure	00560	ANESTH HEART SURG W/O PUMP
Medical Procedure	00580	ANESTH HEART/LUNG TRANSPLNT
Medical Procedure	75750	ARTERY X-RAYS, HEART

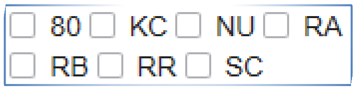
Figure 9-27, Service Code Overlay

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  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

Contact Information

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.

Figure 9-41, Contact Information

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 to remove the attachment.

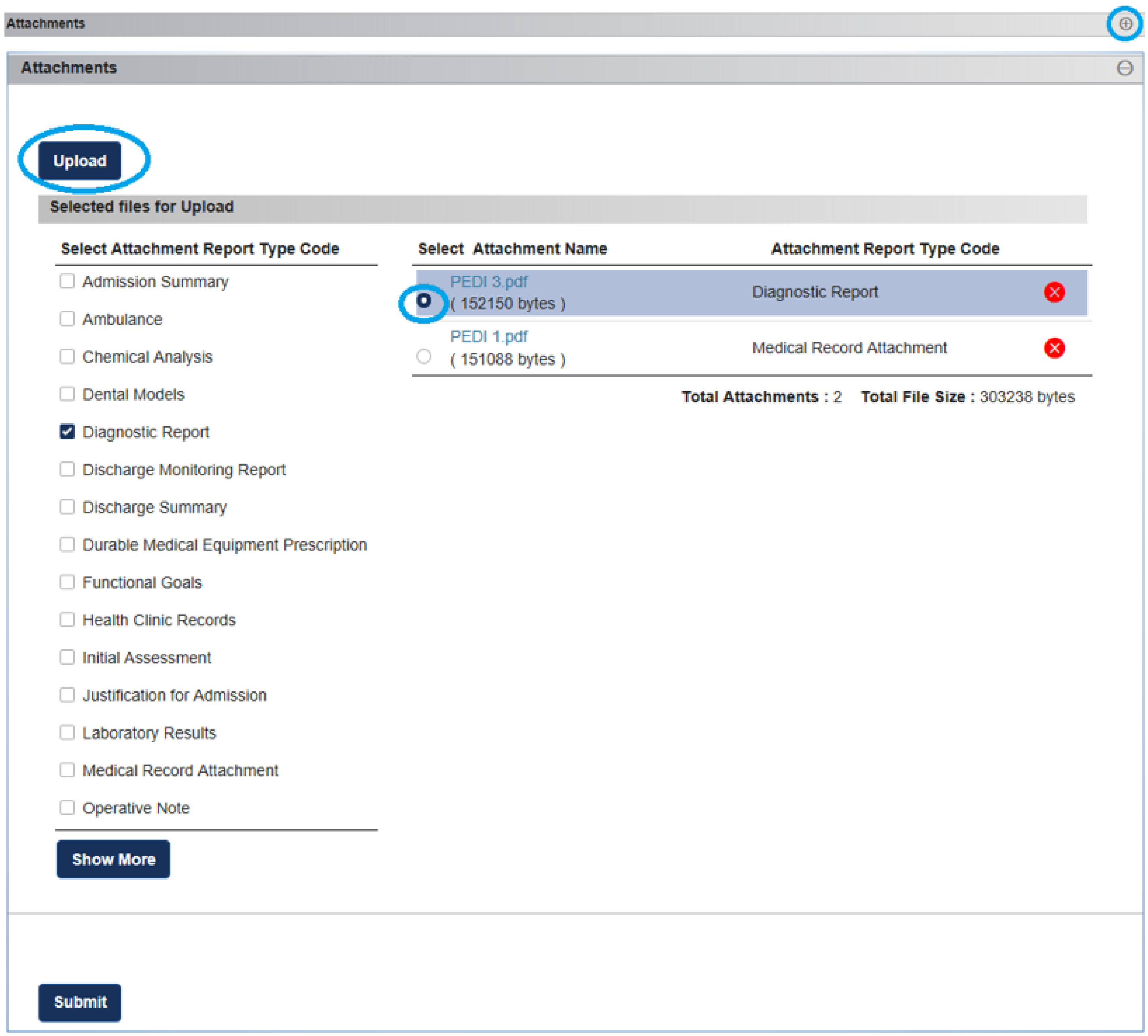


Figure 9-42, Attachments

Submit

10)Click the **Submit** button to save and submit your request.

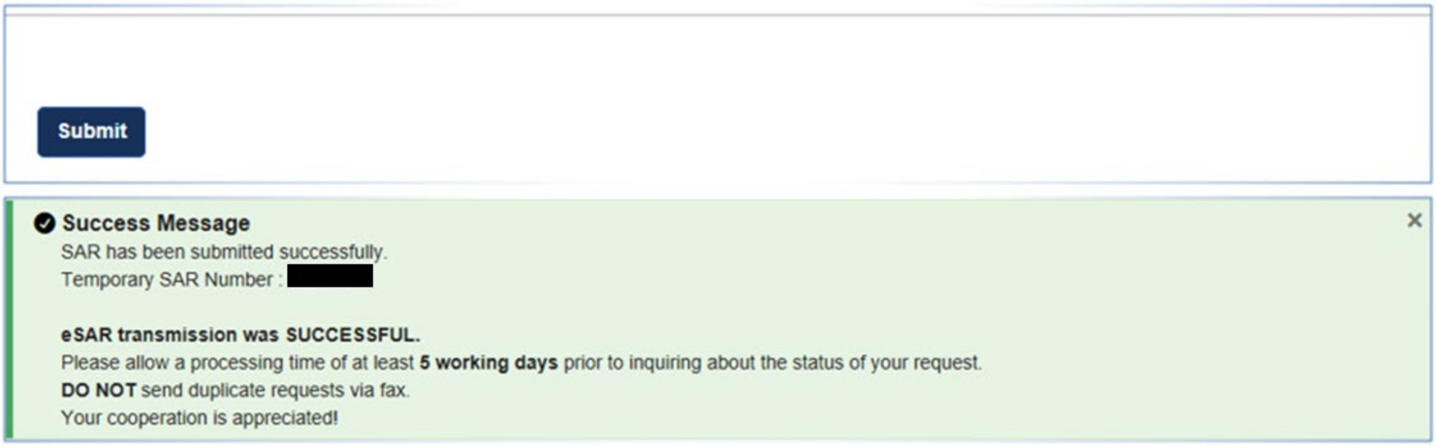


Figure 9-43, Submit – Success Message

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).

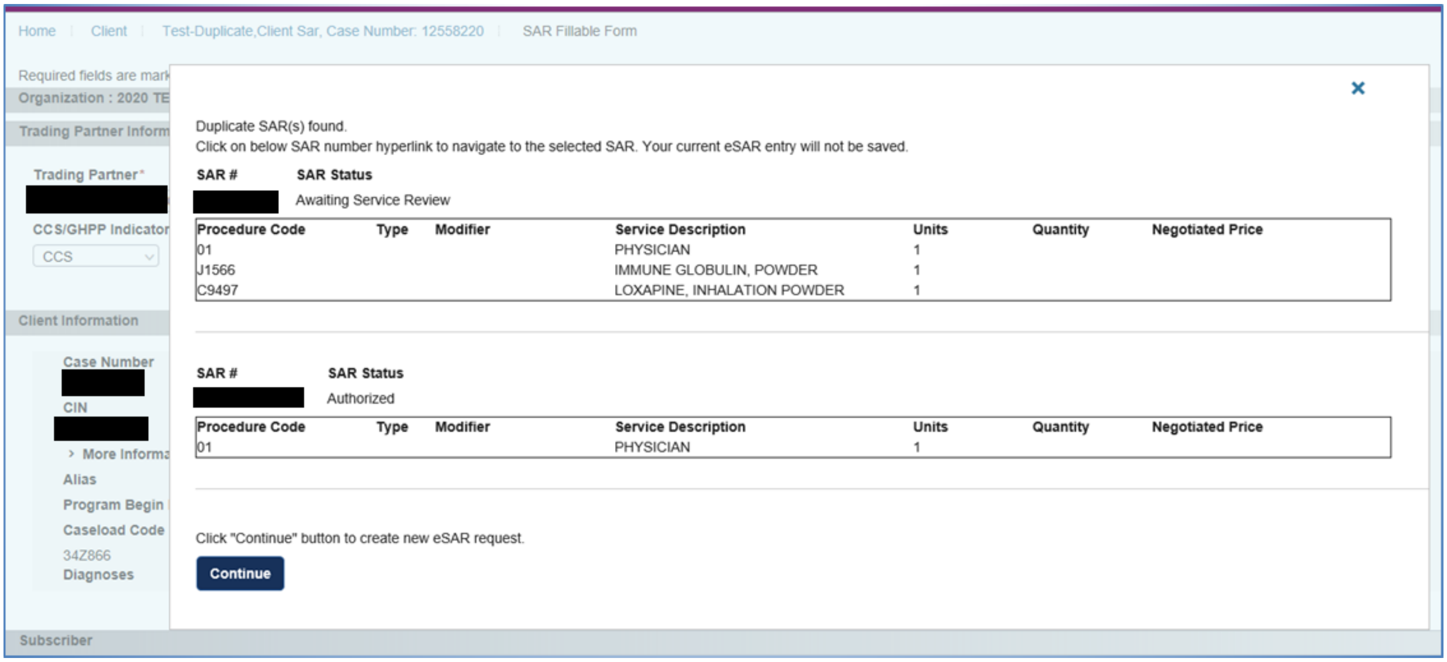


Figure 9-44, Duplicate Check Overlay

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.

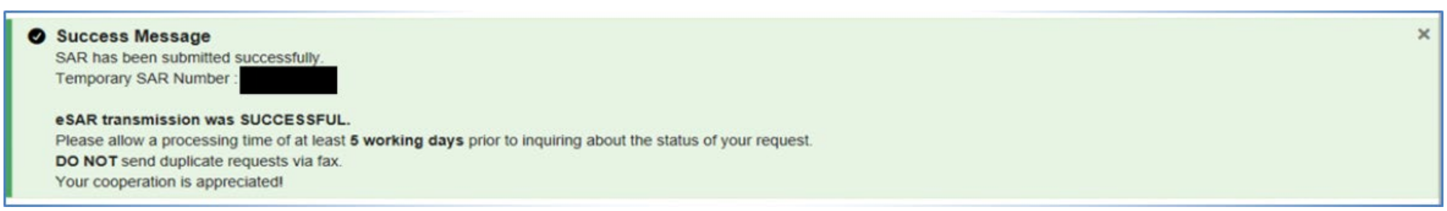


Figure 9-45, Success Message

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.**

SAR Fillable Form Page:

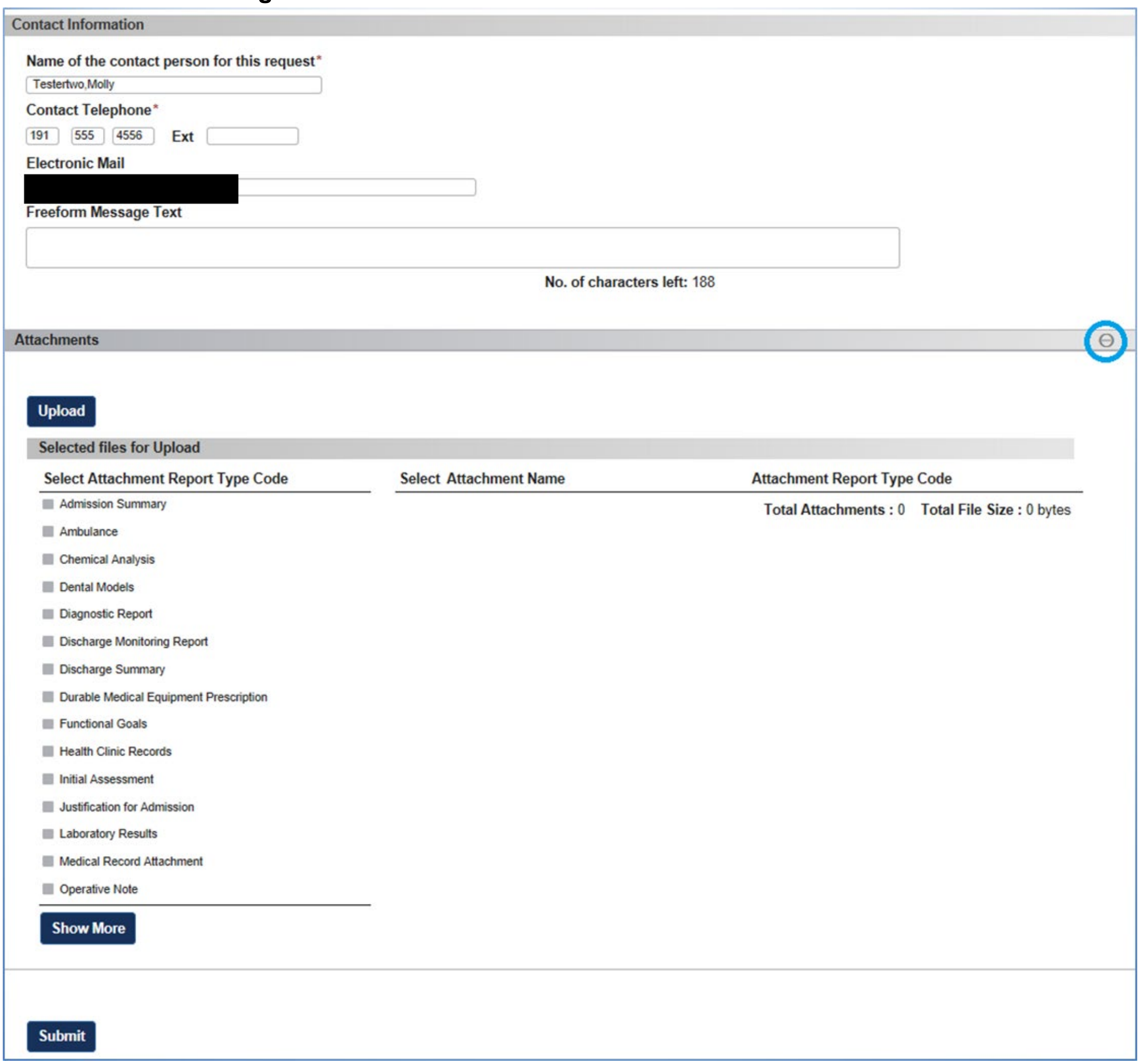
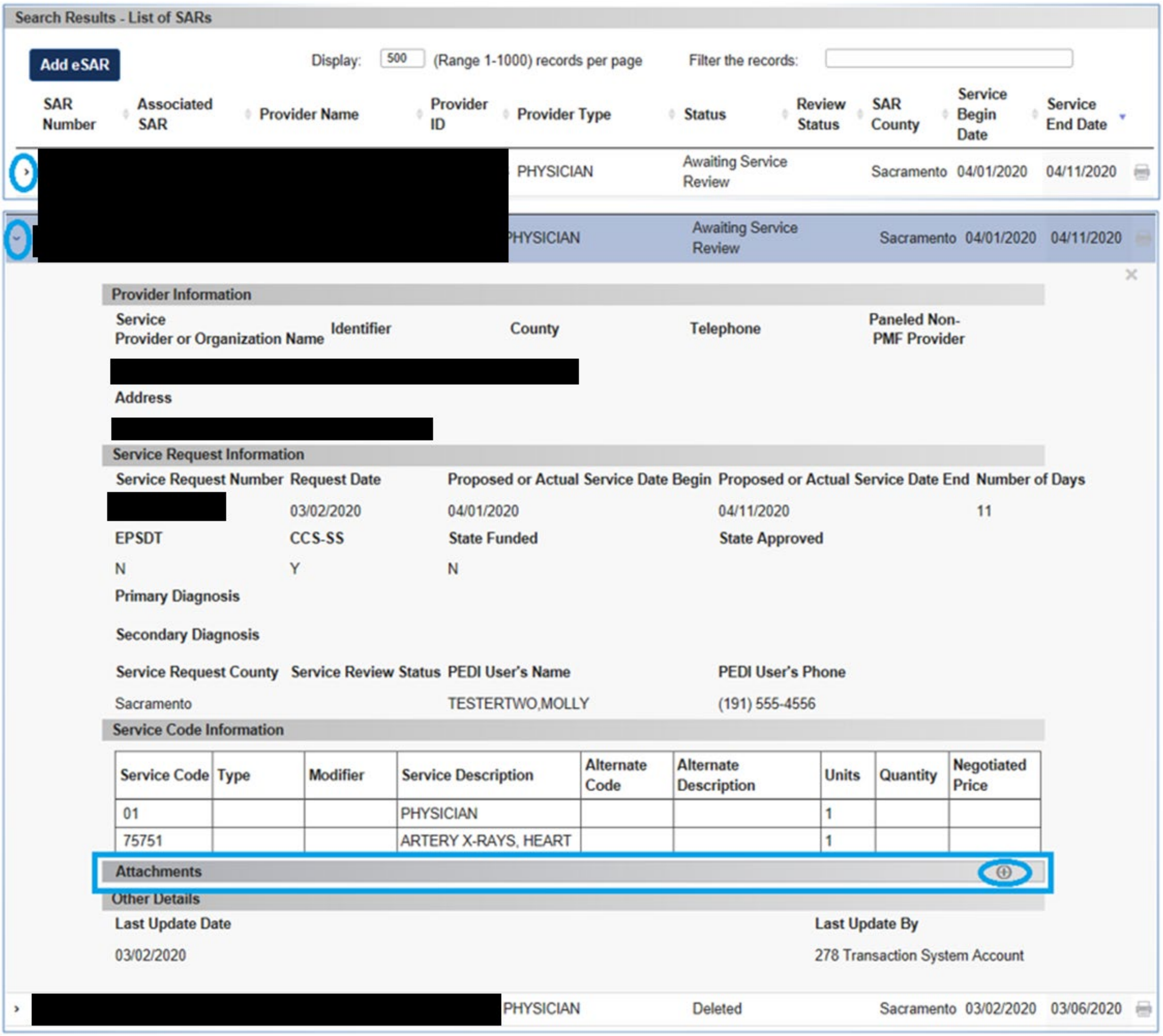


Figure 9-46, SAR Fillable Form - Attachments

Search Results: List of SARs (Click >) SAR Number:


Search Results - List of SARs

Add eSAR

Display: 500 (Range 1-1000) records per page

Filter the records:

SAR Number	Associated SAR	Provider Name	Provider ID	Provider Type	Status	Review Status	SAR County	Service Begin Date	Service End Date
[redacted]				PHYSICIAN	Awaiting Service Review		Sacramento	04/01/2020	04/11/2020
[redacted]				PHYSICIAN	Awaiting Service Review		Sacramento	04/01/2020	04/11/2020

Provider Information

Service Provider or Organization Name	Identifier	County	Telephone	Paneled Non-PMF Provider
[redacted]				

Address

[redacted]

Service Request Information

Service Request Number	Request Date	Proposed or Actual Service Date Begin	Proposed or Actual Service Date End	Number of Days
[redacted]	03/02/2020	04/01/2020	04/11/2020	11

EPSDT	CCS-SS	State Funded	State Approved
N	Y	N	

Primary Diagnosis

Secondary Diagnosis

Service Request County	Service Review Status	PEDI User's Name	PEDI User's Phone
Sacramento		TESTERTWO,MOLLY	(191) 555-4556

Service Code Information

Service Code	Type	Modifier	Service Description	Alternate Code	Alternate Description	Units	Quantity	Negotiated Price
01			PHYSICIAN			1		
75751			ARTERY X-RAYS, HEART			1		

Attachments

Other Details

Last Update Date	Last Update By
03/02/2020	278 Transaction System Account

SAR Number	Associated SAR	Provider Name	Provider ID	Provider Type	Status	Review Status	SAR County	Service Begin Date	Service End Date
[redacted]				PHYSICIAN	Deleted		Sacramento	03/02/2020	03/06/2020

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.

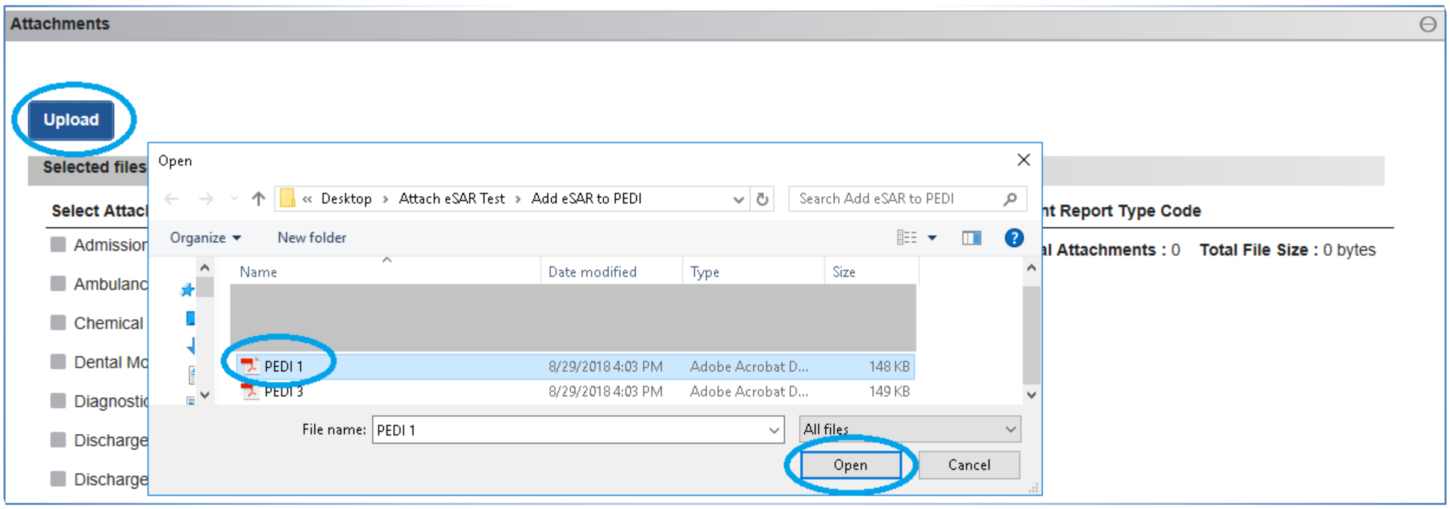


Figure 9-49, Attachments - Upload

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.

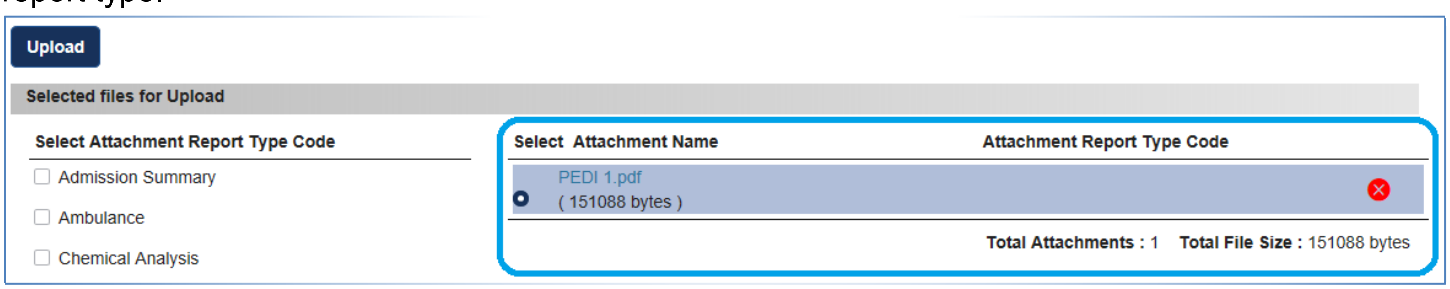


Figure 9-50, Attachments – Add Attachment Report Type

5) Select the attachment report type(s) that applies to the attachment under the Select Attachment Report Type Code section.

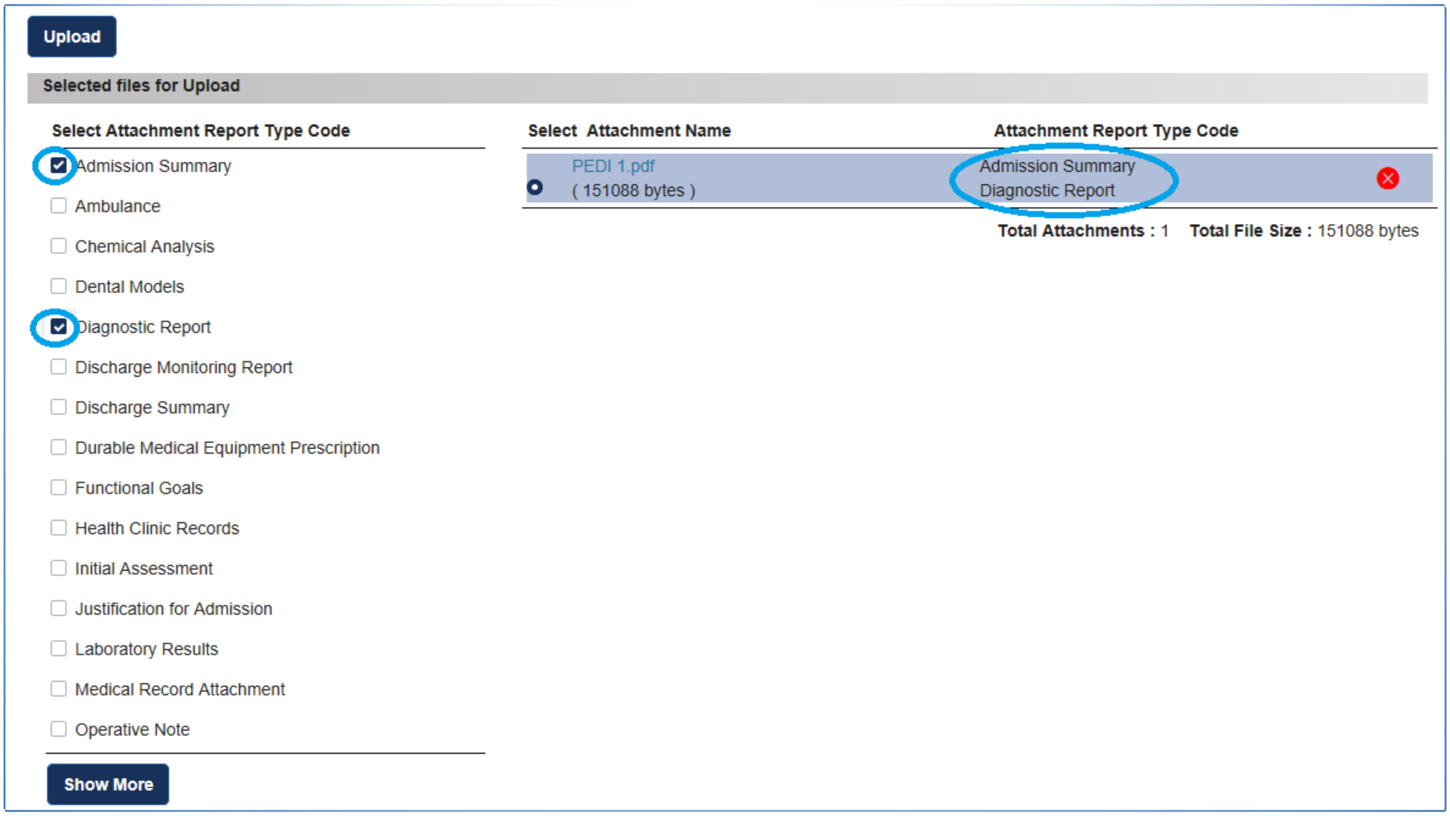


Figure 9-51, Attachments – Attachment Report Type Check Box

6. Click Show More button to see all attachment report types.

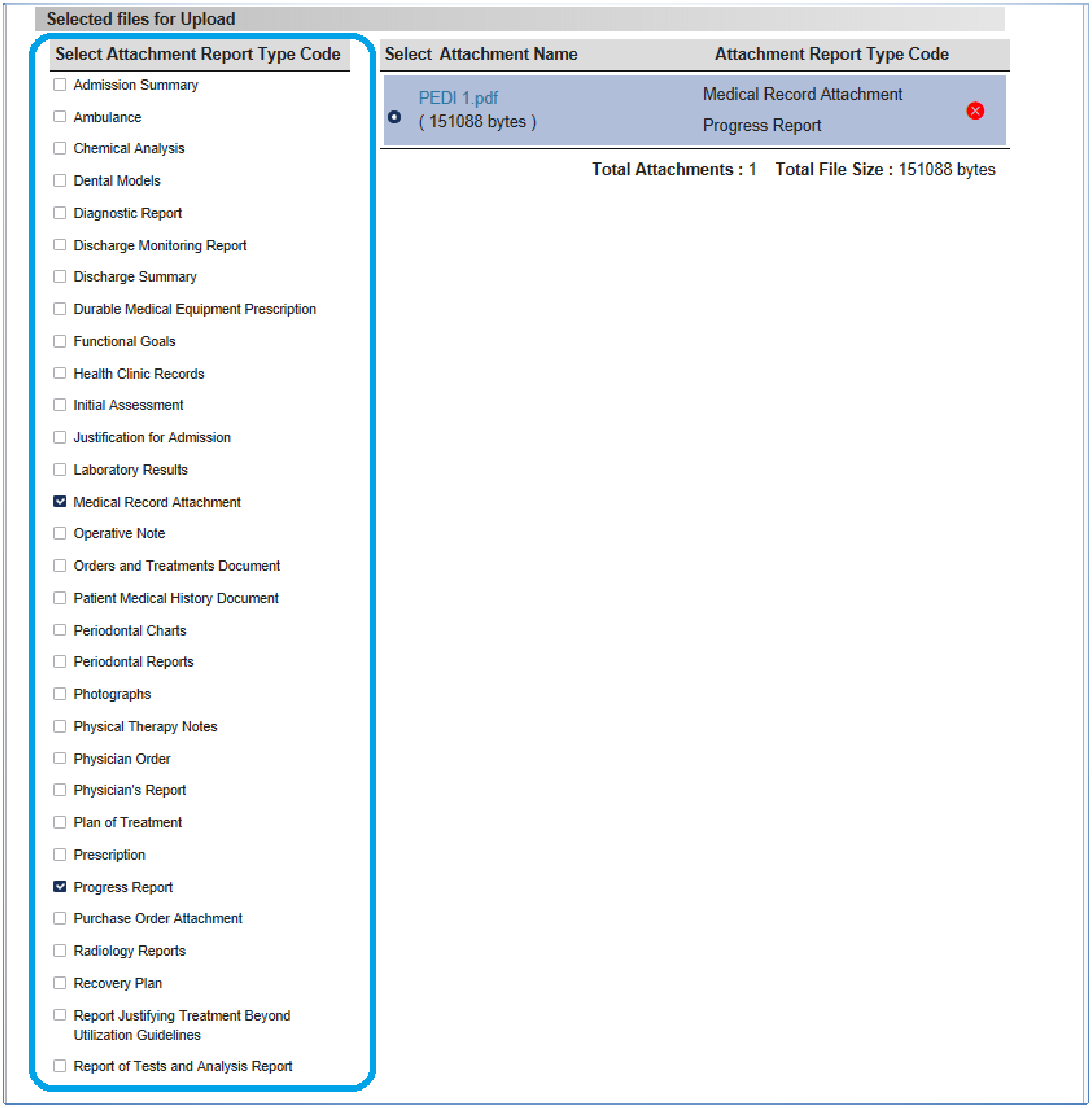


Figure 9-52, Attachment Report Type – Show More

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.

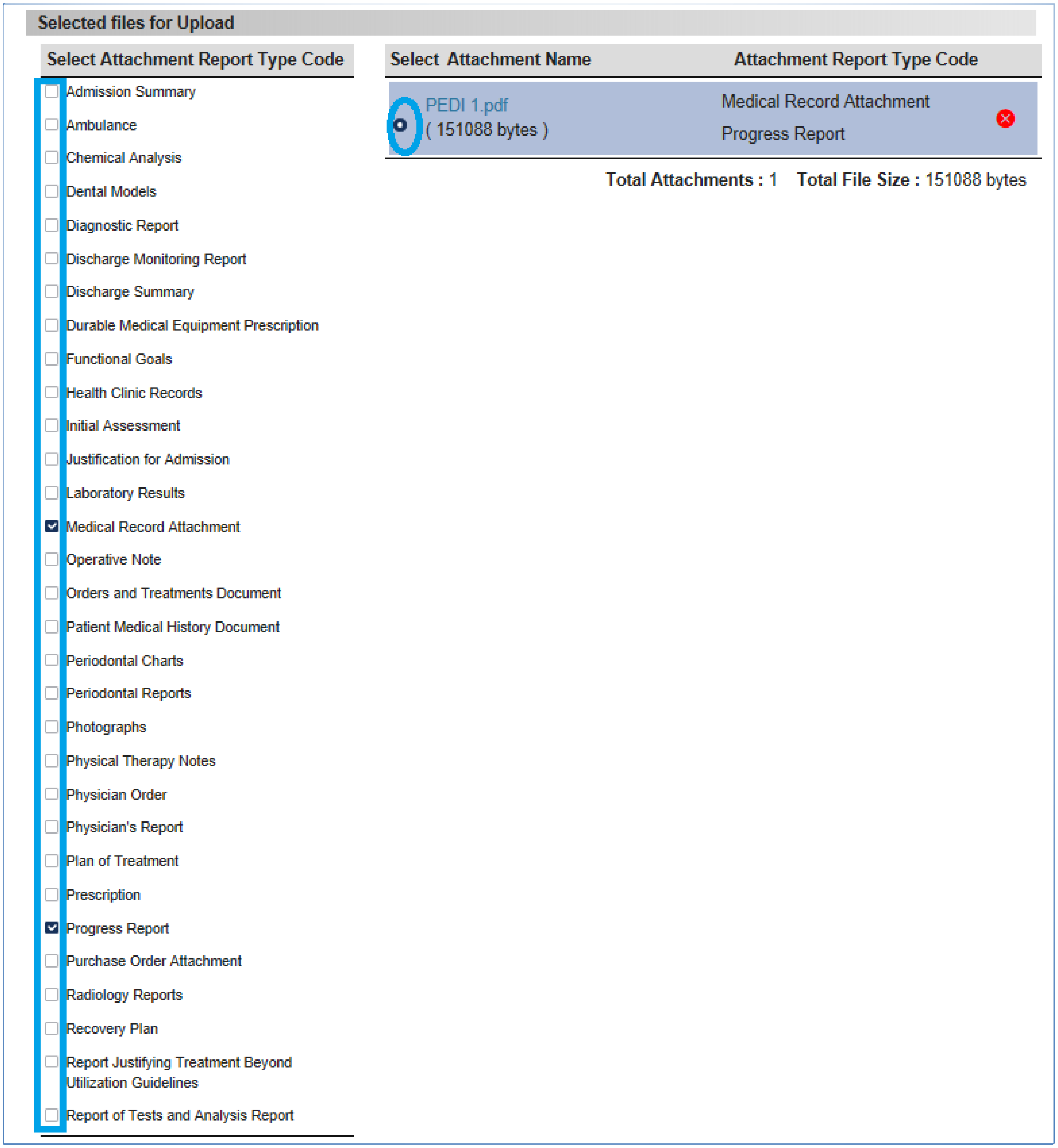


Figure 9-53, Modify Attachments

Remove Attachment

9. To remove an attachment, simple click on the to remove the attachment.

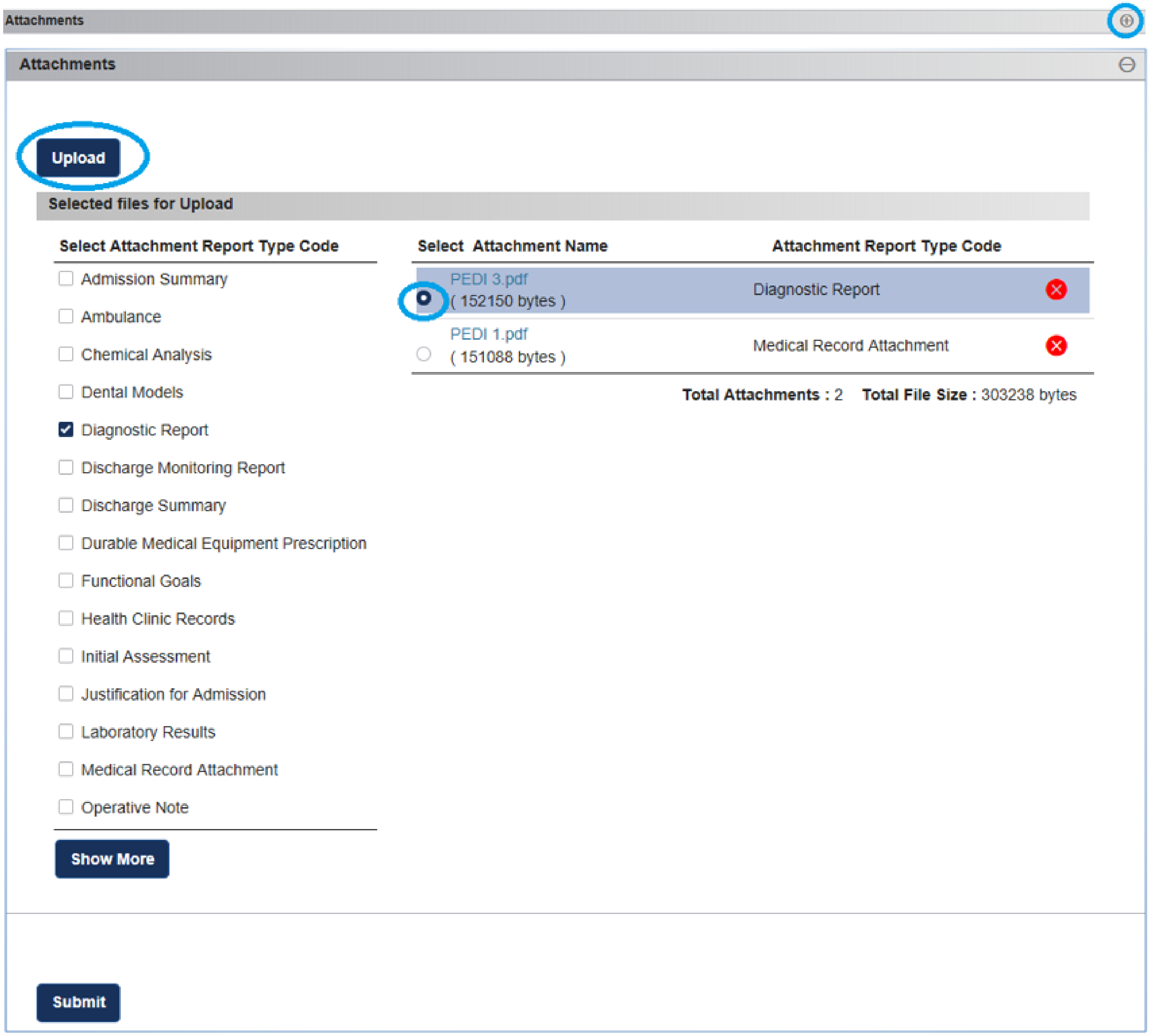


Figure 9-54, Remove Attachments

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.

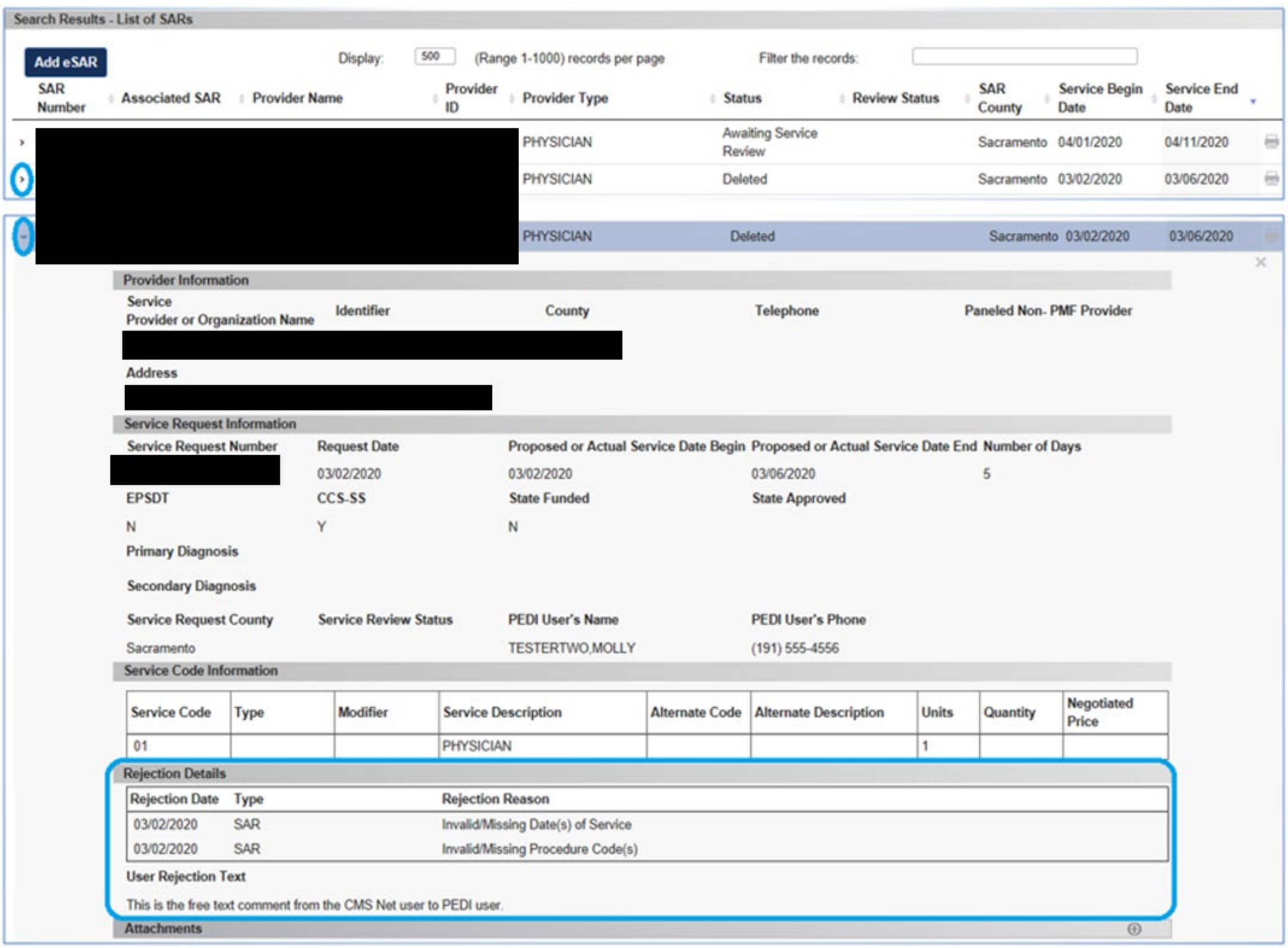


Figure 9-55, eSAR Rejection Details

10 eSAR County Assignment

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) **HAS** 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.

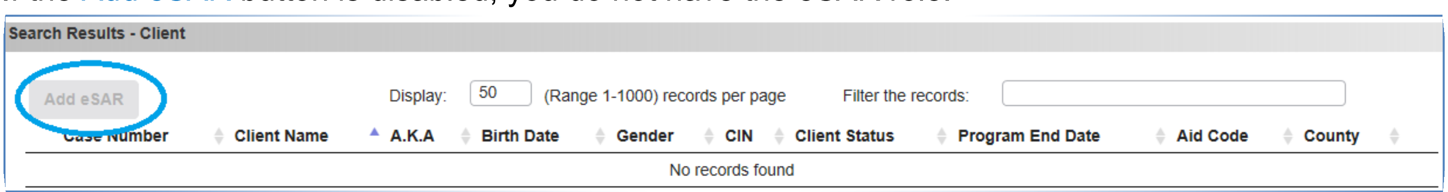


Figure 11-1, Add eSAR - Disabled

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.

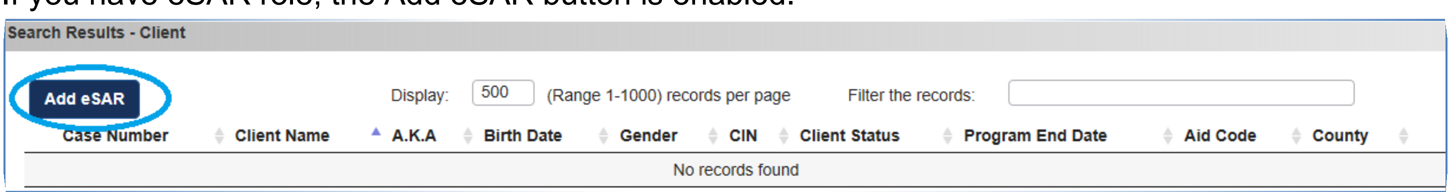


Figure 11-2, Add eSAR - Enabled