Chapter 53

SED Service Authorization

Table of Contents

Important The required fields referenced in this chapter refer to system-required fields. These fields are required in order for the form to be saved in approved status.

The information that is required due to policy may be different from those that are system required.

Accessing the Service Authorization Through an Assessment Form

Introduction

There are three ways to open the Service Authorization:

- Assessment form
- Person Forms
- SED Workload

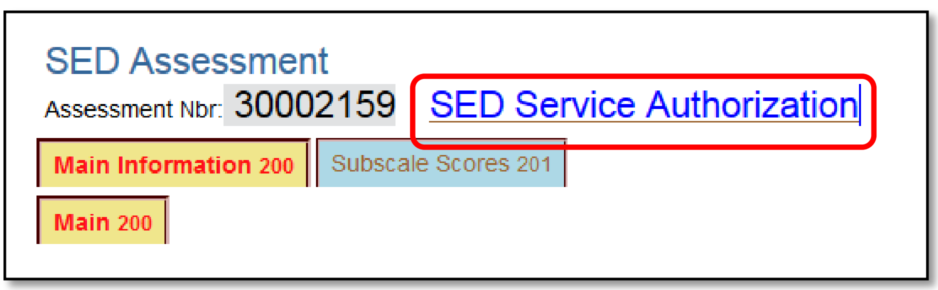
The process of entering the information is the same.

This section explains how to access the Service Authorization through an Assessment Form Window.

How To

Follow the steps in the table below to access the Service Authorization.

Step	Action	Result
1.	Data enter the Assessment information as appropriate.	Customer Assessment form is displayed.
2.	Change form Status to Approve. Click on the **Save** button.	Assessment Form saved.
3.	In the Navigational Panel, click on the **Service Authorization** Link.	Service Authorization will open in a new window.



Accessing the Service Authorization Through Person Forms Listing

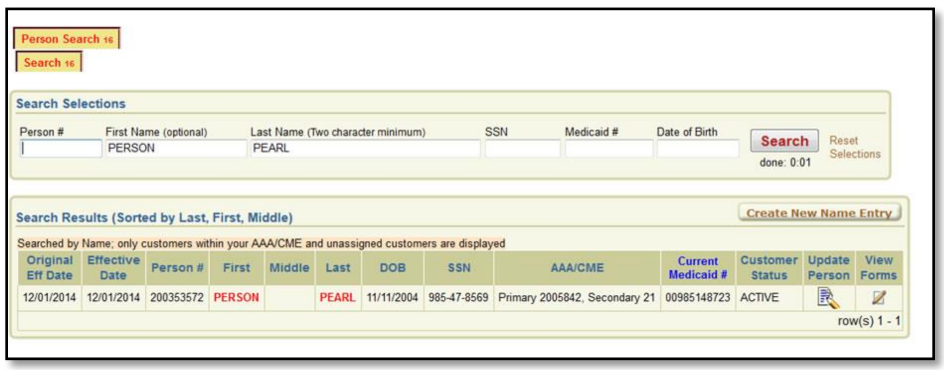
Introduction

This section explains how to access the Service Authorization through the Person Forms page.

How To

Follow the steps in the table below to access the Service Authorization.

Step	Action	Result
1.	Search for Customer in the normal process.	Customer is displayed.



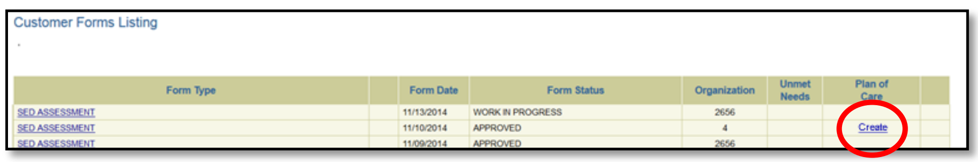
Step	Action	Result
2.	In the Search Results table, in the appropriate customer row, single click on the **View Forms** icon.	List of all forms associated to the customer will be displayed.

Continued on next Page

Accessing the Service Authorization Through Person Forms Listing,
Continued

How To (continued)

Step	Action	Result
3.	In the Forms List table, in the appropriate forms row, single click on the **SA Status Link**. **Status Abbreviations:** <u>CREATE</u> – New <u>INC</u> – Incomplete <u>WIP</u> – Work in Progress <u>SUBMIT</u> – Submitted for Approval (on the MCO's workload) <u>DENIED</u> – MCO Denied <u>APPROVED</u> – MCO Approved	Service Authorization form opens in a new window.



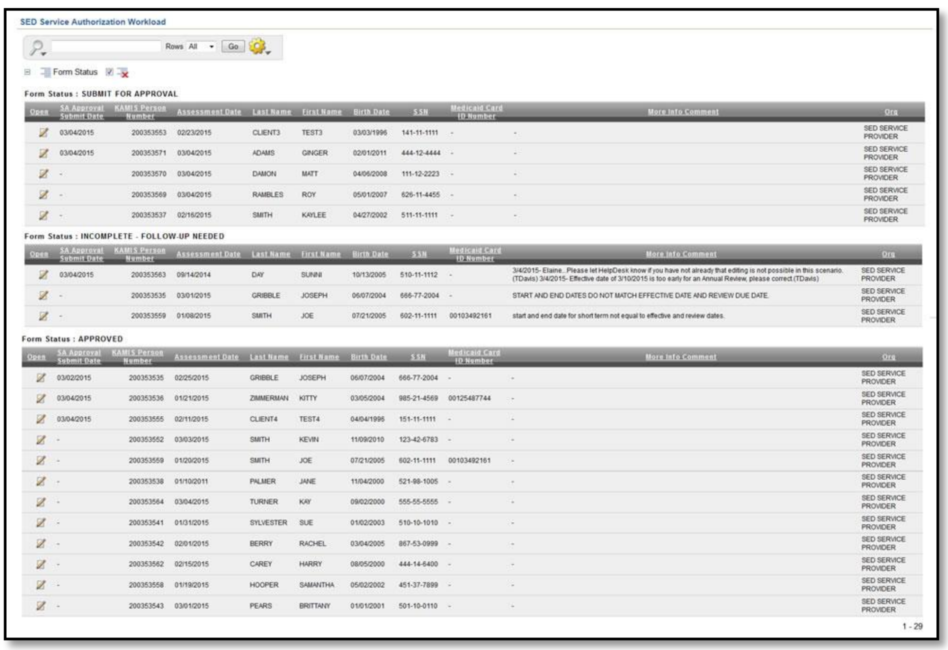
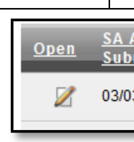
Accessing the Service Authorization Through the SED Workload

Introduction

This section explains how to access the Service Authorization through the SED Workload.

How To

Follow the steps in the table below to access the SED Workload.

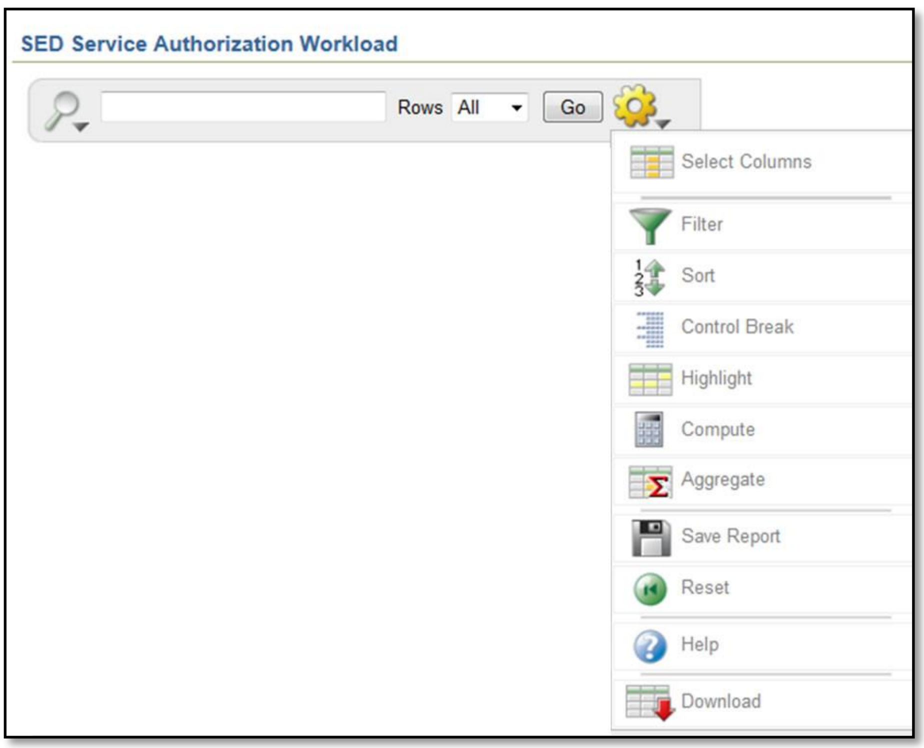
Step	Action	Result
1.	Under the Workloads Region, click on the **SED Service Authorization Workload** button.	Workload displays. Workload is an interactive report. Instructions follow this section.
		
		
2.	Under the "Open" Column click on the pencil icon.	Service Authorization form for the customer displays.
		

Interactive Report Functions

Features Below are the more commonly used reporting tools features offered by interactive reports.

How to

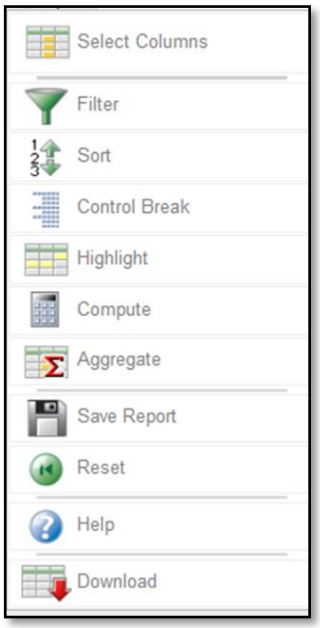
1. Open the Web Application at the Interactive Report view.
2. Click on the gear icon.
3. Report Control List will display.



Functions Covered This instruction section will cover only the most commonly used report functions. Those functions are Filter, Sort, Control Break, Save Report, Reset, and Download.

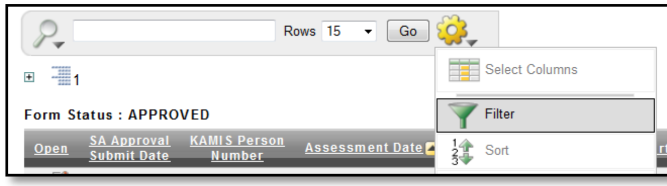
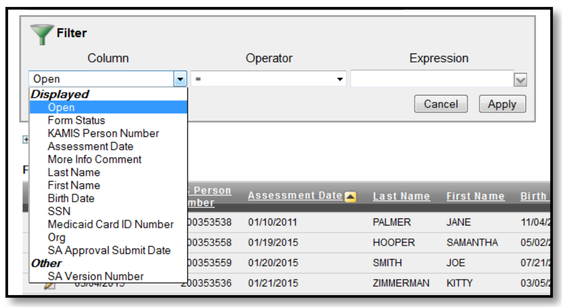
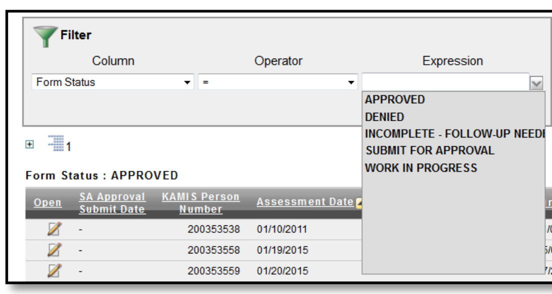
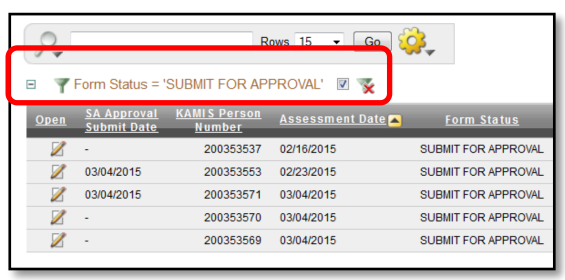
Interactive Report – Descriptions

Functions Below is the descriptions of the functions available in an interactive report.

Reporting Control List	Action
	**Select Columns** – Used to modify the columns displayed. The columns on the right are displayed. The columns on the left are hidden. You can reorder the displayed columns using the arrows on the far right. Computed columns are prefixed with **.
	Filter – Used to filter data for a more detailed view of information.
	Sort – Used to change the column(s) to sort on and whether to sort ascending or descending. You can also specify how to handle nulls (use the default setting, always display them last or always display them first). The resulting sorting is displayed to the right of column headings in the report.
	Control Break – Used to create a break group on one or several columns. This pulls the columns out of the Interactive Report and displays them as a master record.
	Highlight – Highlighting allows you to define a filter. The rows that meet the filter are highlighted using the characteristics associated with the filter.
	Compute – Computations allow you to add computed columns to your report. These can be mathematical.
	Aggregate – Aggregates are mathematical computations performed against a column. Aggregates are displayed after each control break and at the end of the report within the column they are defined. Only numeric columns will be displayed.
	Save Report – Saves the customized report for future use. You provide a name and an optional description. A tab will be displayed for each report saved.
	Reset – Restores report to the default settings.
	Help – On-line Help on report functions.
	Download – Allows the current report to be downloaded. The download formats is CSV which can be opened through Excel.

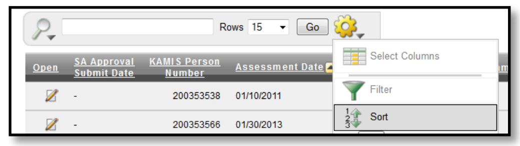
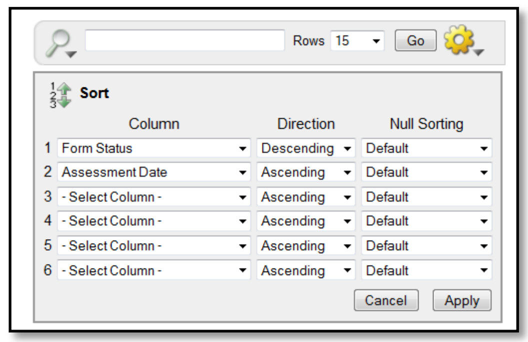
Interactive Report Functions – Filter

How To Follow the steps in the table below to filter a Report.

Step	Action	
1.	Select **Filter** from the Control list.	
2.	Select the **Column** to filter Select the **Operator**	
3.	Select the **Expression**. • By clicking on the drop down arrow at the end of the express field, options will appear if appropriate.	
4.	Click on the "**Go**" button. Report will display. The filter criteria will display at the top of the report.	

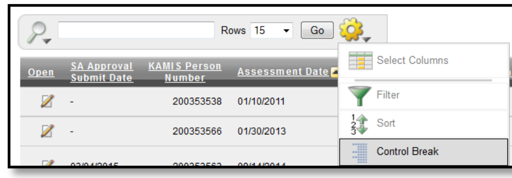
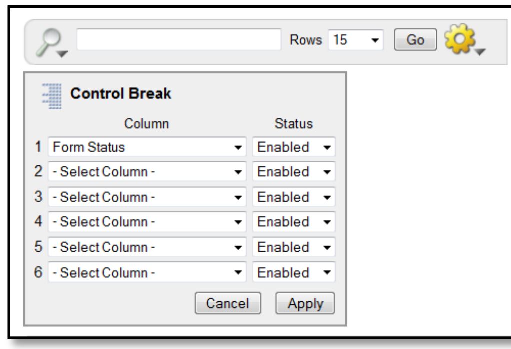
Interactive Report Functions – Sorting

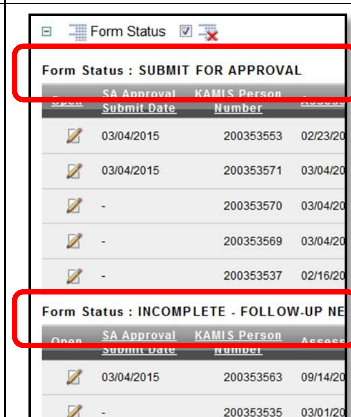
How To Follow the steps in the table below to sort a Report.

Step	Action	
1.	Select **Sort** from the Control list.	
2.	Select the **Column**(s) to be sorted. Select the **Direction** (Ascending or Descending) Select how the **Blank Fields** (nulls)should be displayed.	
3.	Click on **Apply**. Report will display.	

Interactive Report Functions – Control Break on Information

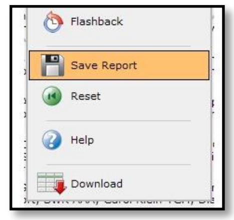
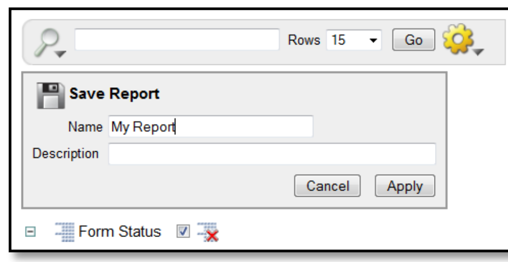
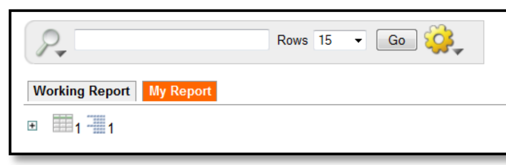
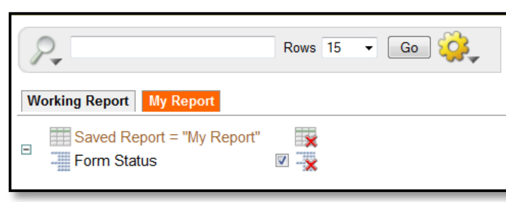
How To Follow the steps in the table below to create breaks on the data information.

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>1.</td><td>Select Control Break from the Control list.</td><td>
</td></tr>
<tr><td>2.</td><td>Select the Column(s) the data will break on.
Select if the Break Status is enable or disenabled.</td><td>
</td></tr>
<tr><td>3.</td><td>Click on Apply. Report will display.

The column selected in Step 2 will become headers.</td><td>
</td></tr>
</table>

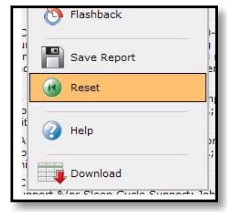
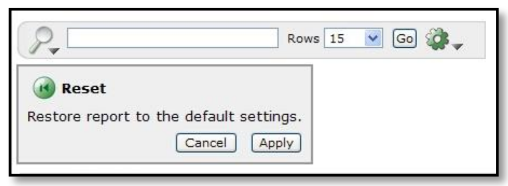
Interactive Report Functions – Saving

How To Follow the steps in the table below to save a specialized Report.

Step	Action	
1.	Select **Save Report** from the Control list.	
2.	Enter the **Name** of the Report to be saved. This will become the Report Tab's name.	
3.	Click on **Apply**. Report will display on a separate tab.	
4.	If the report is no longer needed, it may be deleted. 1. Click on the **delete** icon (icon with red X) 2. Dialog box will display **confirming** deletion of the report. 3. Click on **Apply**.	

Interactive Report Functions – Reset Report

How To Follow the steps in the table below to reset the Report back to default.

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>1.</td><td>Select Reset from the Control list.</td><td>
</td></tr>
<tr><td>2.</td><td></td><td>
</td></tr>
</table>

New Service Authorization Description

Introduction

The Service Authorization form has three regions:

- Service Authorization Status Information
- Create Service Detail or Update Service Detail
- Service Listing

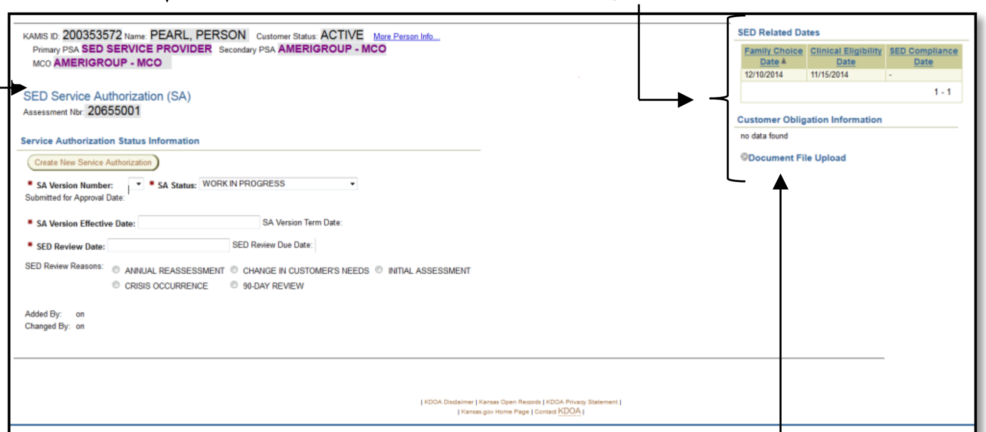
New Service Authorization Page

When accessing a new Service Authorization only the Service Authorization Status Information region is available until the Service Authorization is created. Once create, the Create Service Detail region will display.

Customer Heading. (Indicates the Customer and the Organizations associated with the customer.)

SED Related Dates and Customer Obligation Information Regions

Create New Service Authorization Action Button



File Upload Expandable Region

Continued on next Page

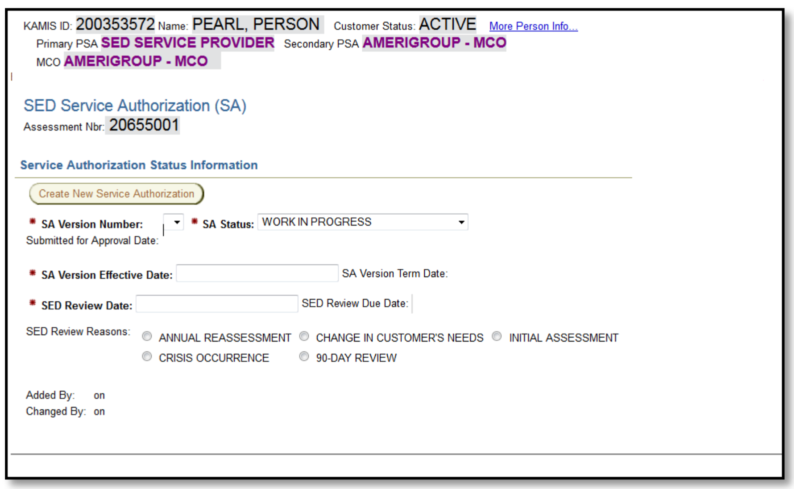
Creating a New Service Authorization

Introduction

The following sections will address creating a new Service Authorization in KAMIS.

How to

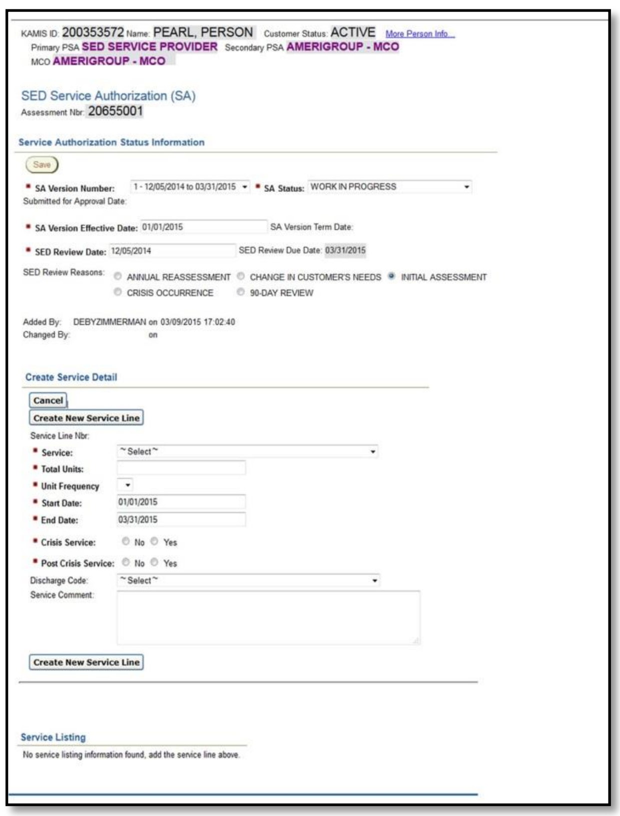
Follow the steps in the table below to create a new Service Authorization.

Step	Action	Result
1.	Open the **Service Authorization**.	SED Service Authorization Page will be displayed.
		
2.	The following fields are required in order to create the Service Authorization: • SA Effective Date • SED Review Date • SED Review Reasons	
3.	Enter data into the required fields.	Note: SA Version Effective Date reflects the date that the services will be placed into effect.
4.	Click on the **Create New Service Authorization** button.	The following will occur:

Continued on next Page

How to (continued)

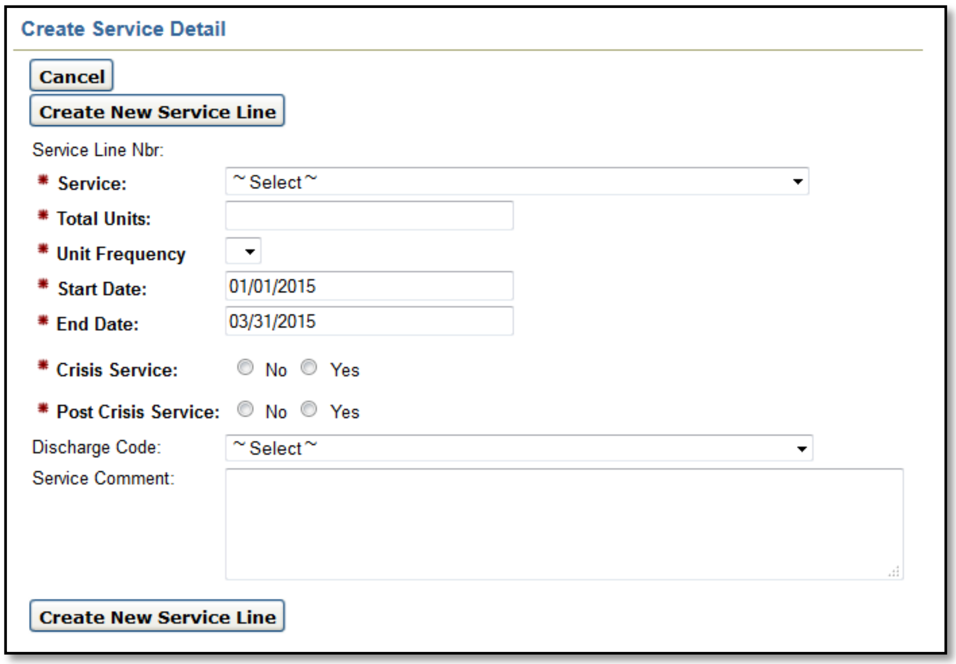
Step	Action	Result
5.	• SA Version will be created. • SA Status will be "Work in Progress" • SED Review Due Date will be calculated (90 days from the effective date) • SA Version Number will display with the dates representing the Review period. • Create Service Detail region will display. • Service Listing region will display	



Entering Service Line Items

Introduction

Once the Service Authorization is created, the Create Service Detail region will display. This region is where the new service information will be entered.



Continued on next Page

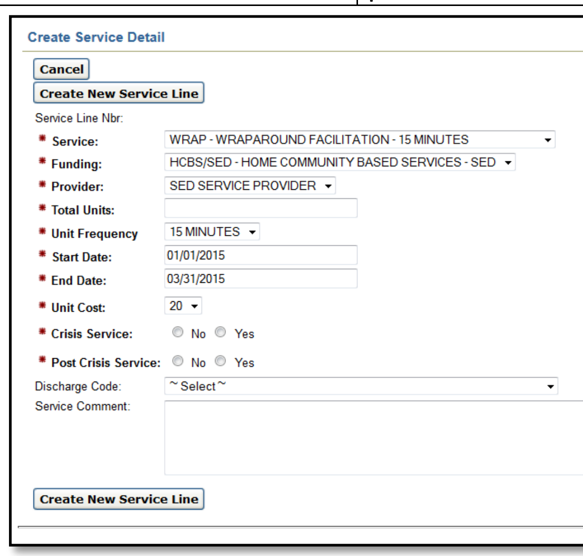
Note

The Service Provider process needs to be completed in order for the services, funding and unit pricing to display. See KAMIS Chapter 24 - Provider Service for detailed instructions.

How To

Follow the steps in the table below to enter data into Create Service Detail region.

Step	Action	Result
1.	**Service** – Select the appropriate service from the drop down dialog box.	The complete service title and unit standards are displayed. Funding field will display after the service is selected.
2.	**Funding** – Select the appropriate funding from the drop down dialog box.	Only the sources associated with the service will be displayed. Provider field will display after the service is selected.
3.	**Provider** – Select the appropriate Provider from the drop down dialog box.	Only the providers that have been associated with the service/funding combination within the Service Provided process will be displayed.



Continued on next Page

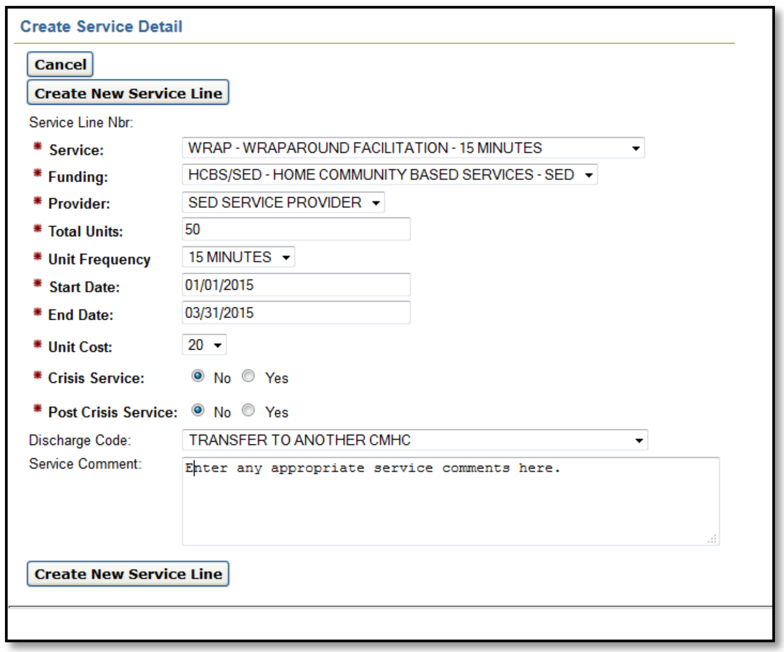
How To (continued)

Step	Action	Result
4.	**Total Units** – Enter the number of total units to be provided.	Required
5.	**Unit Frequency** – Frequency of the Service defaults as appropriate to the service.	Defaults
6.	**Start Date** – Defaults to the Review Start Date. However, this can be changed as needed.	Required
7.	**End Date** – Defaults to the Review End Date. However, this can be changed as needed.	Required
8.	**Unit Cost** – Populates with the cost entered in the Service Provider process.	Defaults
9.	**Crisis Service** – Select either "Yes" or "No". **	Required
10.	**Post Crisis Service** – Select either "Yes" or "No". **	Required
	**** NOTE**: One line can be entered for the Crisis Service and Post Crisis Service with the units combined. However, a comment must be entered as to how many units will be used for each category. (Example: 20 units for Crisis and 10 units for Post Crisis)	
11.	**Discharge Code** – Enter if appropriate.	Required if the Service is ending.

Continued on next Page

How To (continued)

Step	Action	Result
12.	**Service Comment** – Enter any special notes that pertain to the service line that may be useful to the approver or other users.	


Create Service Detail

Cancel

Create New Service Line

Service Line Nbr:

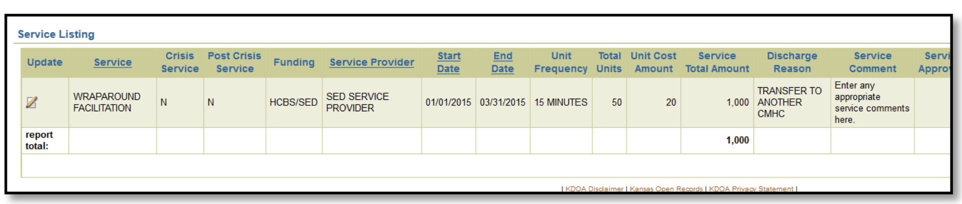
* Service: WRAP - WRAPAROUND FACILITATION - 15 MINUTES
* Funding: HCBS/SED - HOME COMMUNITY BASED SERVICES - SED
* Provider: SED SERVICE PROVIDER
* Total Units: 50
* Unit Frequency: 15 MINUTES
* Start Date: 01/01/2015
* End Date: 03/31/2015
* Unit Cost: 20
* Crisis Service: No Yes
* Post Crisis Service: No Yes

Discharge Code: TRANSFER TO ANOTHER CMHC

Service Comment: Enter any appropriate service comments here.

Create New Service Line

Step	Action	Result
13.	Click on the **Create New Service Line** button.	The entry will be saved and added to the Service Listing region.


Service Listing

Update	Service	Crisis Service	Post Crisis Service	Funding	Service Provider	Start Date	End Date	Unit Frequency	Total Units	Unit Cost Amount	Service Total Amount	Discharge Reason	Service Comment	Servi Appro
	WRAPAROUND FACILITATION	N	N	HCBS/SED	SED SERVICE PROVIDER	01/01/2015	03/31/2015	15 MINUTES	50	20	1,000	TRANSFER TO ANOTHER CMHC	Enter any appropriate service comments here.	
report total:											1,000			

| KDOA Disclaimer | Kansas Open Records | KDOA Privacy Statement |

Modifying a Service Authorization – Work In Progress Status

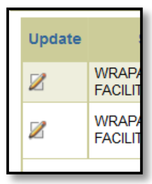
Introduction

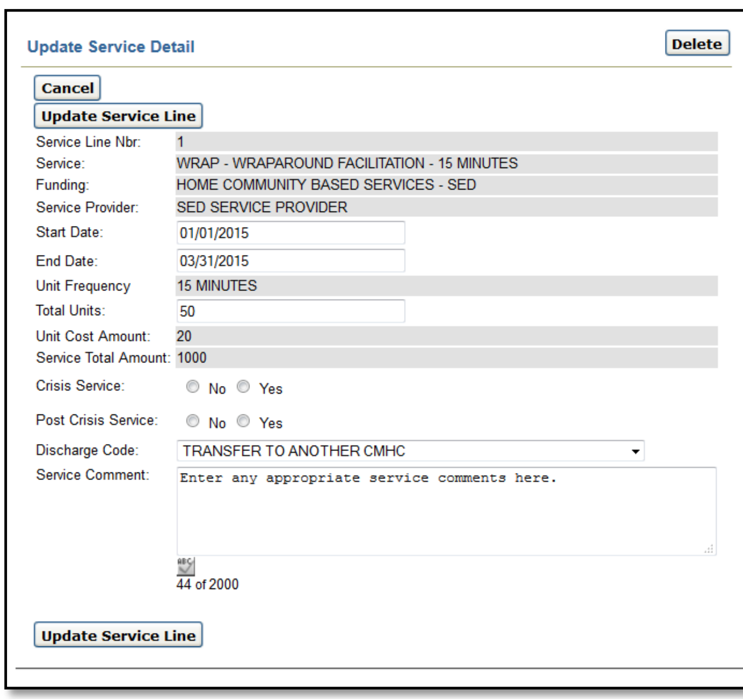
Service information can be changed without creating a new version of the Service Authorization as long as the status is “Work In Progress”.

How To

Follow the steps in the table below to modify a service line item.

Step	Action	Result
1.	Open existing Service Authorization.	Page will display.
2.	In the Service Table locate the service line that will be modified.	
3.	Select the line for modification by clicking on the **pencil icon** under the **Update** column.	Line will display in the Update Service Detail region.





Continued on next Page

Modifying a Service Authorization – Work In Progress Status, Continued

How To (continued)

Step	Action	Result
4.	Only certain fields are editable	Fields editable: • Start Date • End Date • Total Units • Crisis Service Indicator • Post Crisis Service Indication • Discharge Code • Service Comment
5.	Modify the information as appropriate.	
6.	Click on **Update Service Line** button when the changes are complete.	The modified information will be saved and the line item in the table will be updated.
7.	Change **SA Status** to **Submit for Approval**.	
8.	Press the **Save** button.	Will save the status change of the Service Authorization.

Deleting a Service Authorization – Work In Progress Status

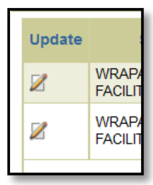
Introduction

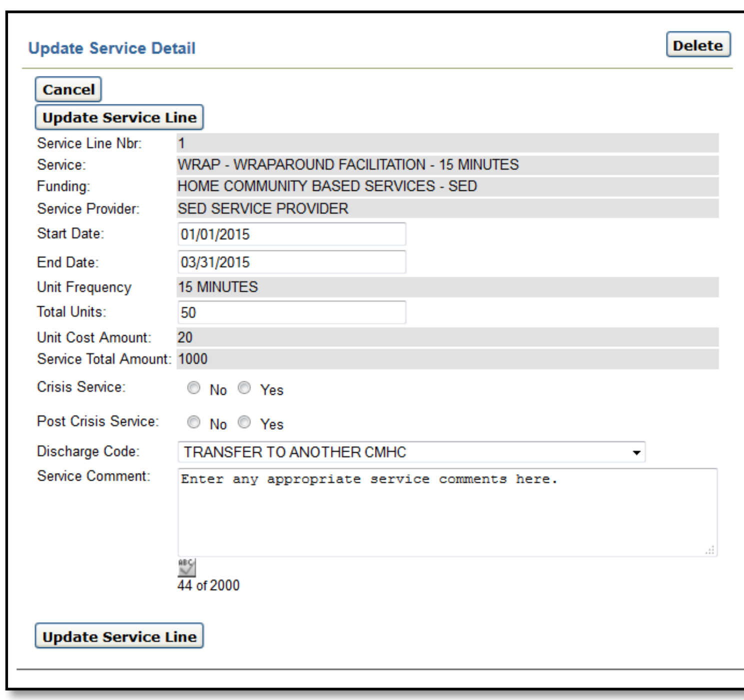
Service information can be deleted without creating a new version of the Service Authorization as long as the status is "Work In Progress".

How To

Follow the steps in the table below to delete a service line item.

Step	Action	Result
9.	Open existing Service Authorization.	Page will display.
10.	In the Service Table locate the service line that will be deleted.	
11.	Select the line for deletion by clicking on the **pencil icon** under the **Update** column.	Line will display in the Update Service Detail region.

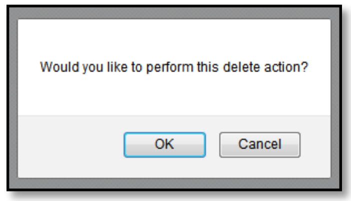




Continued on next Page

Deleting a Service Authorization – Work In Progress Status, Continued

How To (continued)

Step	Action	Result
12.	Click on **Delete** button.	A delete confirmation notice will display.
		
13.	Click on **OK** to proceed with the line deletion.	The line item in the table will be removed.
14.	Change **SA Status** to **Submit for Approval**.	
15.	Press the **Save** button.	Will save the status change of the Service Authorization.

Submitting a Service Authorization for MCO Approval

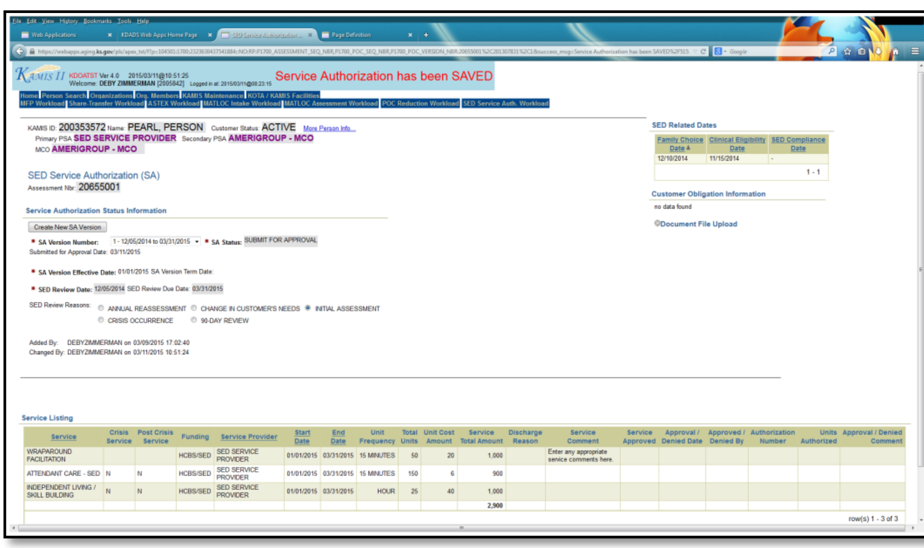
Introduction

In KAMIS the Service Authorization must be in a KAMIS “Submit for Approval” Status for the Service Authorization to appear on the MCO Workload.

How To

Follow the steps in the table below to change the status of the Service Authorization.

Step	Action	Result
1.	Change **SA Status** to **Submit for Approval**.	
2.	Press the **Save** button.	The Service Authorization will save. The following will occur: • All fields will be disabled and turn gray in color. • The Submitted for Approval Date will be calculated. • The Service Listing line items will no longer be editable. • A successful save message displayed in the heading area.



Creating a New Version of a Service Authorization

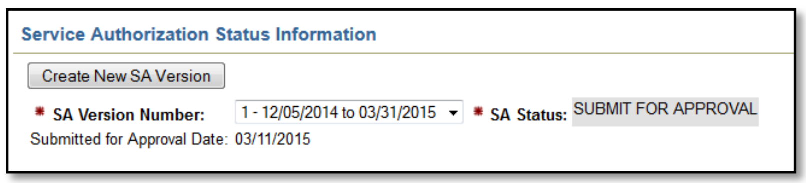
Introduction

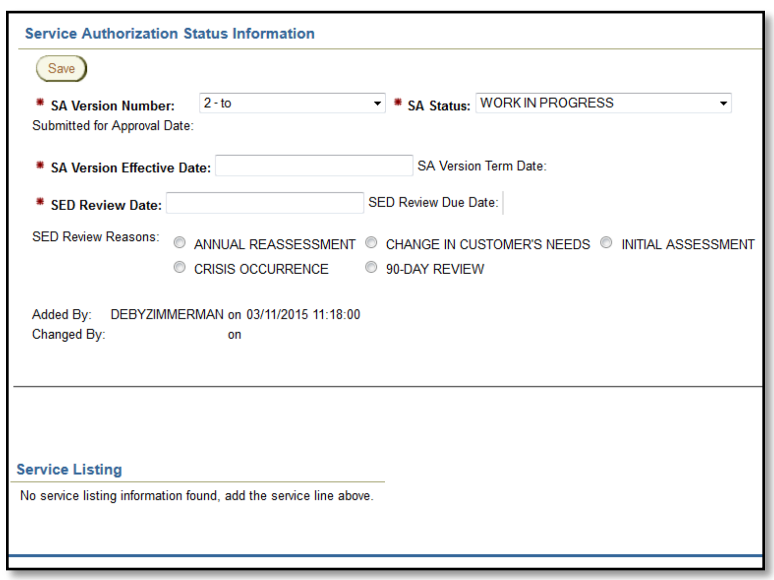
Once services are entered into the Service Authorization and saved as Submit for Approval, Approved or Denied, modifications can only be made by creating a new version of the existing Service Authorization.

How To

Follow the steps in the table below to create a new version of the Service Authorization in order to modify a service line item.

Step	Action	Result
1.	Open existing Service Authorization.	Page will display.
2.	Click on the **Create New SA Version** button.	New version will be created with all Service Authorization Status Information cleared and no services listed.





Step	Action	Result
3.	Enter in the appropriate required information.	

Continued on next Page

Creating a New Version of a Service Authorization, Continued

How To (continued)

Step	Action	Result
4.	Click on the **Save** button.	SA is created and the following occurs:

- Copy Existing Service Lines To This Version button is displayed.
- Create Service Detail region is displayed.
- No services have been copied from the previous version.

Copying Services to a New Version of a Service Authorization

Introduction

Once the new version of the Service Authorization is created, there are two options of how services can be entered.

- Enter services within in the Create Service Detail region.
- Copy the existing service(s) from the previous version of the Service Authorization.

Entering Services Option

Once a new service line item is created manually, the option to copy the existing service(s) from the previous version is removed. Therefore, if appropriate, copy the existing service(s), modify or delete services that are no longer applicable, and then add additional services.

Copy Services Options

When copying services to the new version certain fields are modified or cleared depending upon the Effective Date and Review Date for each version.

If the Effective Date and Review Date are the same as the previous version the following occurs:

- Service Line Item Start Date remains
- Service Line Item End Date remains
- All MCO Approval information is not cleared

If the Effective Date and Review Date are the not the same as the previous version the following occurs:

- Service Line Item Start Date = new SED Review Date
- Service Line Item End Date = new SED Review Due Date
- All MCO Approval information is cleared.

Continued on next Page

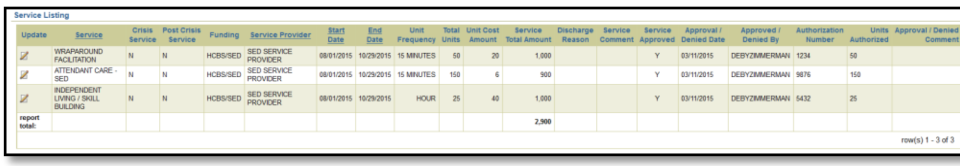
Copying Services to a New Version of a Service Authorization, Continued

How To

Follow the steps in the table below to create a new version of the Service Authorization in order to modify a service line item.

Step	Action	Result
1.	Click on the **Copy Existing Service Lines To This Version** button. 	Service line items are copied over according to the above Copy Services Options.

Same Effective and Review Dates

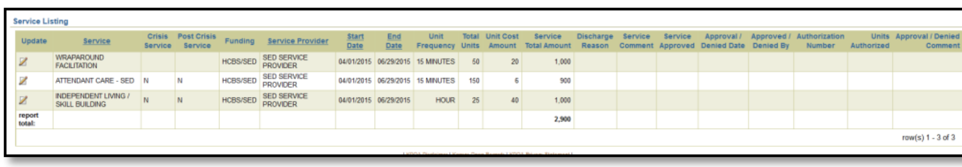


Service Listing

Update	Service	Crisis Service	Post Crisis Service	Funding	Service Provider	Start Date	End Date	Unit Frequency	Total Units	Unit Cost Amount	Service Total Amount	Discharge Reason	Service Comment	Service Approved	Approval / Denied Date	Approved / Denied By	Authorization Number	Units Authorized	Approval / Denied Comment
	WRAPAROUND FACILITATION	N	N	HCBS/SED	SED SERVICE PROVIDER	08/01/2015	10/29/2015	15 MINUTES	50	20	1,000			Y	03/11/2015	DEBYZIMMERMAN	1234	50	
	ATTENDANT CARE - SED	N	N	HCBS/SED	SED SERVICE PROVIDER	08/01/2015	10/29/2015	15 MINUTES	150	6	900			Y	03/11/2015	DEBYZIMMERMAN	9876	150	
	INDEPENDENT LIVING / SKILL BUILDING	N	N	HCBS/SED	SED SERVICE PROVIDER	08/01/2015	10/29/2015	HOUR	25	40	1,000			Y	03/11/2015	DEBYZIMMERMAN	5432	25	
report total:											2,900								

row(s) 1 - 3 of 3

Different Effective and Review Dates



Service Listing

Update	Service	Crisis Service	Post Crisis Service	Funding	Service Provider	Start Date	End Date	Unit Frequency	Total Units	Unit Cost Amount	Service Total Amount	Discharge Reason	Service Comment	Service Approved	Approval / Denied Date	Approved / Denied By	Authorization Number	Units Authorized	Approval / Denied Comment
	WRAPAROUND FACILITATION			HCBS/SED	SED SERVICE PROVIDER	04/01/2015	06/29/2015	15 MINUTES	50	20	1,000								
	ATTENDANT CARE - SED	N	N	HCBS/SED	SED SERVICE PROVIDER	04/01/2015	06/29/2015	15 MINUTES	150	6	900								
	INDEPENDENT LIVING / SKILL BUILDING	N	N	HCBS/SED	SED SERVICE PROVIDER	04/01/2015	06/29/2015	HOUR	25	40	1,000								
report total:											2,900								

row(s) 1 - 3 of 3

Step	Action	Result
2.	Add, Delete or Modify the Service Line Items as appropriate.	

Modifying a Service Authorization – Other Statuses

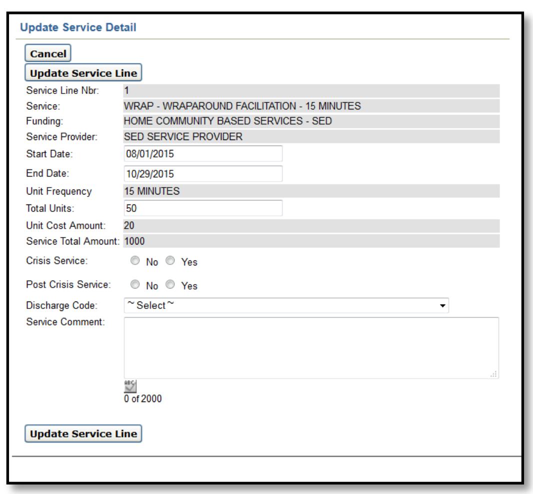
Introduction

Service information can only be changed by creating a new version of the Service Authorization once the Service Authorization is no longer in the “Work In Progress” status.

How To

Follow the steps in the table below to modify a service line item.

Step	Action	Result
1.	Open existing Service Authorization.	Page will display.
2.	Create a new Service Authorization Version.	Version is created.
3.	Copy Service Line Items to the current version if appropriate.	Service Line Items are copied.
4.	In the Service Table locate the service line that will be modified.	
5.	Select the line for modification by clicking on the **pencil icon** under the **Update** column.	Line will display in the Update Service Detail region.



Continued on next Page

Modifying a Service Authorization – Other Statuses, Continued

How To (continued)

Step	Action	Result
6.	Only certain fields are editable	Fields editable: • Start Date • End Date • Total Units • Crisis Service Indicator • Post Crisis Service Indication • Discharge Code • Service Comment
7.	Modify the information as appropriate.	
8.	Click on **Update Service Line** button when the changes are complete.	The modified information will be saved and the line item in the table will be updated. See Note below.
• If the service line item has the MCO Approval Information displayed, once the line is updated, the approval information will be cleared. This is an indication to the MCO that the service information has been changed.		
9.	Change **SA Status** to **Submit for Approval**.	
10.	Press the **Save** button.	Will save the status change of the Service Authorization.

Deleting a Service Authorization – Other Statuses

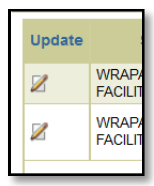
Introduction

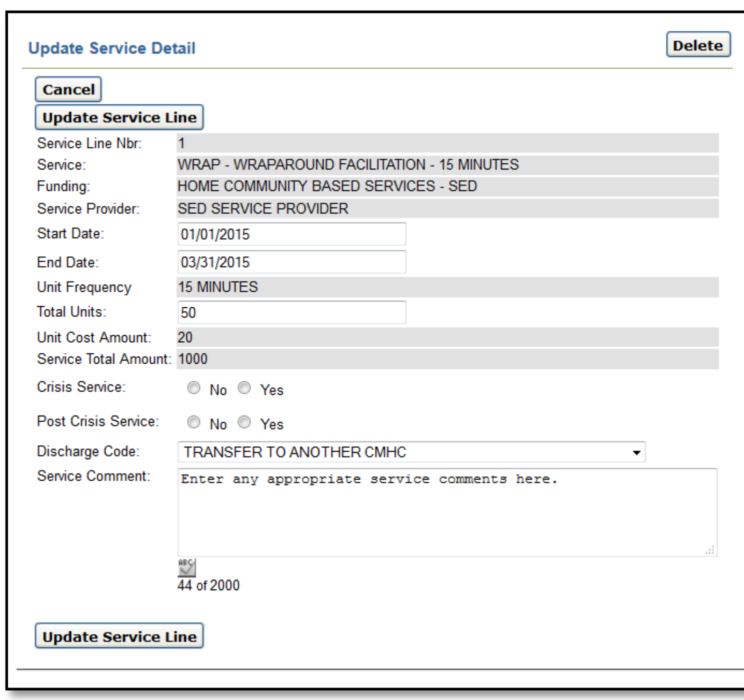
Service information can be deleted without creating a new version of the Service Authorization as long as the status is “Work In Progress”.

How To

Follow the steps in the table below to delete a service line item.

Step	Action	Result
1.	Open existing Service Authorization.	Page will display.
2.	In the Service Table locate the service line that will be deleted.	
3.	Select the line for deletion by clicking on the **pencil icon** under the **Update** column.	Line will display in the Update Service Detail region.

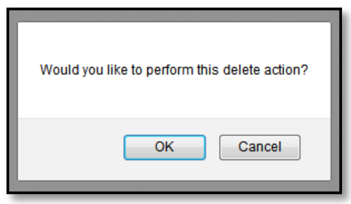




Continued on next Page

Deleting a Service Authorization – Other Statuses, Continued

How To (continued)

Step	Action	Result
	• If the service line item has the MCO Approval Information displayed, the Delete button will not be displayed. This is due to the Effective and Review Date are the same as the previous version. The line will need to be modified (difference end date and/or a discharge code entered) and submitted to the MCO for action.	
4.	Click on **Delete** button.	A delete confirmation notice will display.
		
5.	Click on **OK** to proceed with the line deletion.	The line item in the table will be removed.
6.	Change **SA Status** to **Submit for Approval**.	
7.	Press the **Save** button.	Will save the status change of the Service Authorization.

MCO Process - Returning a Service Authorization Incomplete - More Information Needed

Introduction

Once services are entered into the Service Authorization and saved with a SA Status of Submit for Approval in KAMIS, the Service Authorization is placed on the MCO Workload.

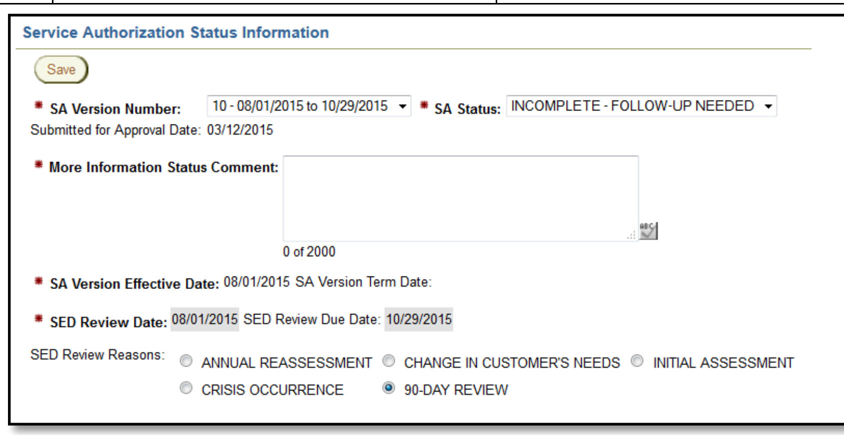
At times, more information may be required by the MCO prior to them taking action. The MCO will change the SA Status to Incomplete – Follow-Up Needed and enter a comment as to what information is needed.

Once saved, the Service Authorization will remain on the MCO Workload and will display on the CMHC Workload under the Incomplete – Follow-Up Needed section.

How To

Follow the steps in the table below to change the status to Incomplete – Follow-Up Needed for CMHC action.

Step	Action	Result
1.	Open existing Service Authorization.	Page will display.



1.	Change SA Status to **Incomplete – Follow-Up Needed**	
2.	Click on **Save** button.	The **More Information Status Comment** field will display.
3.	Type in a comment regarding what information is required.	
4.	Press the **Save** button.	

CMHC Process - Service Authorization Incomplete - More Information Needed

Introduction

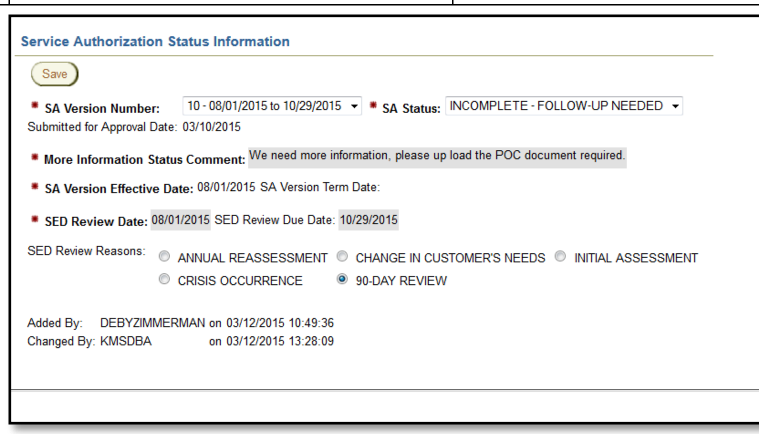
Once services are entered into the Service Authorization and saved with a SA Status of Submit for Approval in KAMIS, the Service Authorization is placed on the MCO Workload.

At times, more information may be required by the MCO prior to them taking action. The MCO will change the SA Status to Incomplete – Follow-Up Needed and enter a comment as to what information is needed.

Once saved, the Service Authorization will remain on the MCO Workload and will display on the CMHC Workload under the Incomplete – Follow-Up Needed section.

How To

Follow the steps in the table below to act upon the information needed request from the MCO.

Step	Action	Result
1.	Open existing Service Authorization.	Page will display.
		
2.	A new SA Version will not need to be created.	Take action to complete the additional information requested.
3.	Change **SA Status** to **Submit for Approval**.	
4.	Press the **Save** button.	Will save the status change of the Service Authorization.

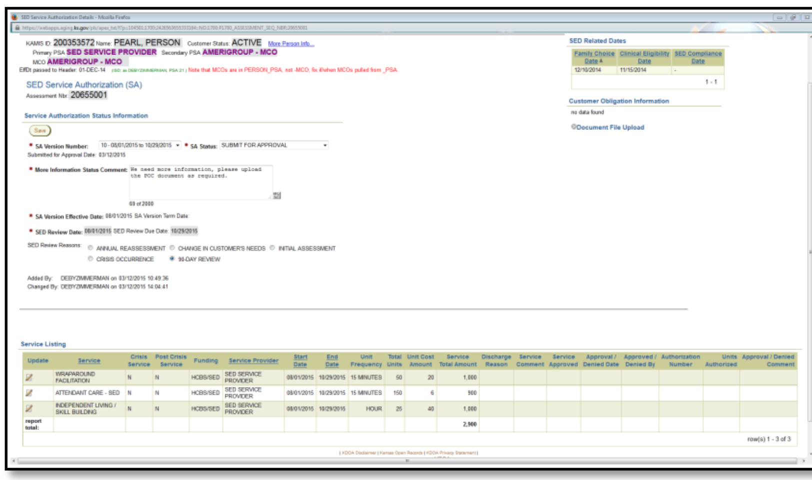
MCO Process – Approving / Denying a Service Authorization

Introduction

Once services are entered into the Service Authorization and saved with a SA Status of Submit for Approval in KAMIS, the Service Authorization is placed on the MCO Workload.

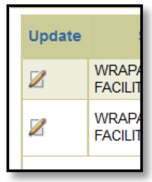
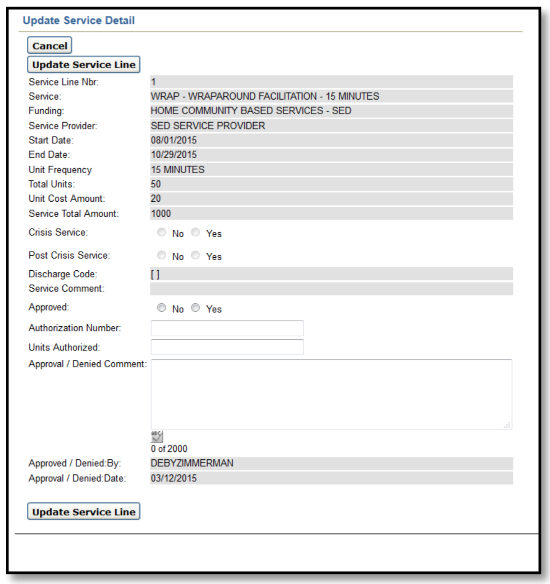
How To

Follow the steps in the table below to approve or deny the individual service line items on the Service Authorization.

Step	Action	Result
1.	Open existing Service Authorization.	Page will display.
		

Continued on next Page

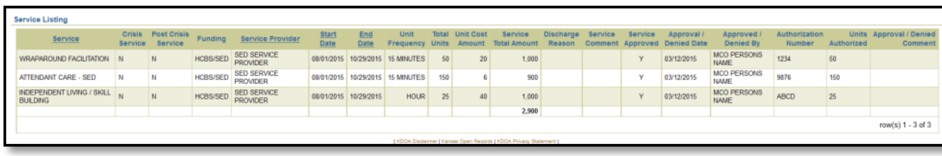
How To (continued)

Step	Action	Result
2.	Select the line for approval/denial by clicking on the **pencil icon** under the **Update** column.	Line will display in the Update Service Detail region.
 		
3.	Only certain fields are editable	Fields editable:
• Approved • Authorization Number • Units Authorized • Approval / Denied Comment		
4.	The following fields information is defaulted as: • The Approved / Denied By = User Name • The Approved / Denied Date = Current Date	

Continued on next Page

How To (continued)

Step	Action	Result
5.	Enter the information as appropriate.	
6.	Click on **Update Service Line** button when the changes are complete.	The modified information will be saved and the line item in the table will be updated.



Service Listing

Service	Crisis Service	Post Crisis Service	Funding	Service Provider	Start Date	End Date	Unit Frequency	Total Units	Unit Cost Amount	Service Total Amount	Discharge Reason	Service Comment	Service Approved	Approval / Denied Date	Approved / Denied By	Authorization Number	Units Authorized	Approval / Denied Comment
WRAPAROUND FACILITATION	N	N	HCBS/SED	SED SERVICE PROVIDER	08/01/2015	10/29/2015	15 MINUTES	50	20	1,000			Y	03/12/2015	MCO PERSONS NAME	1234	50	
ATTENDANT CARE - SED	N	N	HCBS/SED	SED SERVICE PROVIDER	08/01/2015	10/29/2015	15 MINUTES	150	6	900			Y	03/12/2015	MCO PERSONS NAME	9876	150	
INDEPENDENT LIVING / SKILL BUILDING	N	N	HCBS/SED	SED SERVICE PROVIDER	08/01/2015	10/29/2015	HOUR	25	40	1,000			Y	03/12/2015	MCO PERSONS NAME	ABCD	25	
										2,900								

row(s) 1 - 3 of 3

| KDOA Disclaimer | Kansas Open Records | KDOA Privacy Statement |

7.	Change **SA Status** to **Approved** or **Denied**	Only use the Denied status if all service line items have been denied.
8.	Press the **Save** button.	Will save the status change of the Service Authorization. All fields will be disabled for all users.

SA Approval/Denial Reviewed Process

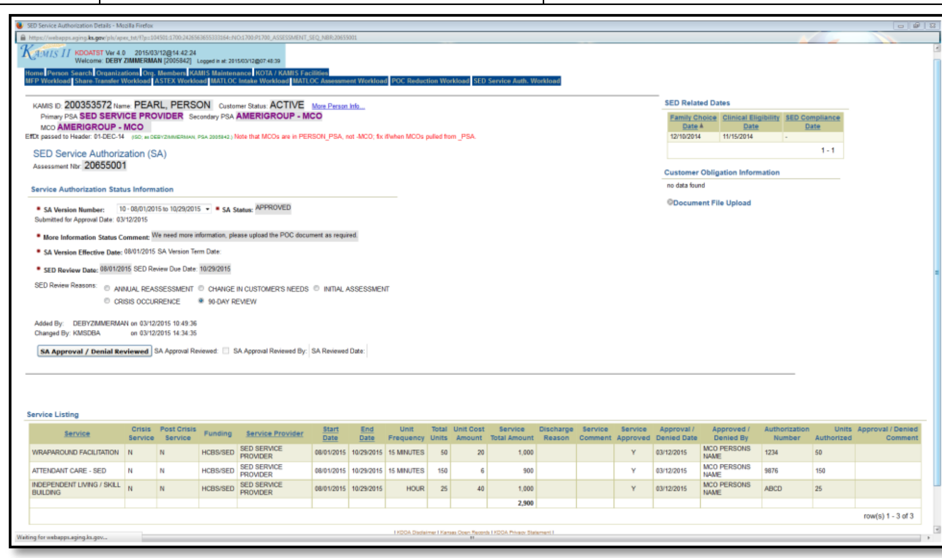
Introduction

Once services are entered into the Service Authorization and saved as Approved or Denied in KAMIS, the CMHC will need to indicate that the Service Authorization has been reviewed. This will remove the Service Authorization from all workloads.

How To

Follow the steps in the table below to mark the Service Authorization as reviewed by the CMHC.

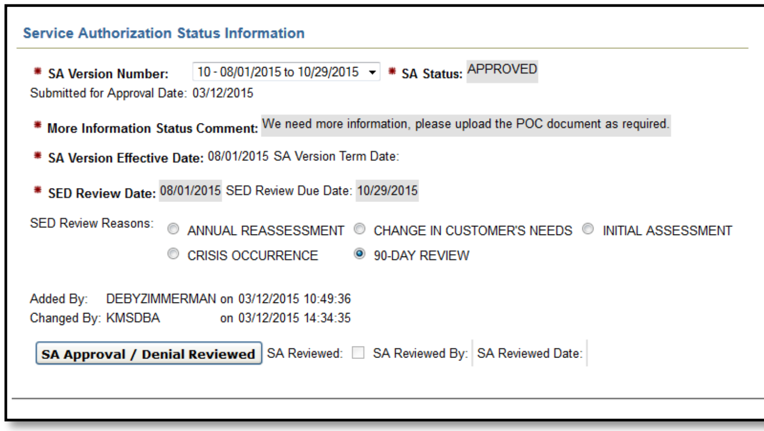
Step	Action	Result
1.	Open existing Service Authorization.	Page will display.



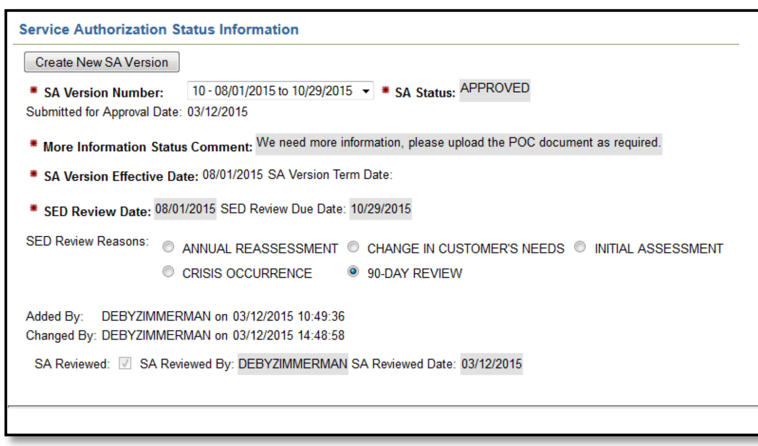
Continued on next Page

How To (continued)

Step	Action	Result
2.	Click on **SA Approval / Denial Reviewed** button.	The following fields will be updated automatically:



Step	Action / Result
3.	• SA Reviewed = Checked • SA Reviewed By = Users Name • SA Reviewed Date = Current Date



Document File Upload

Introduction

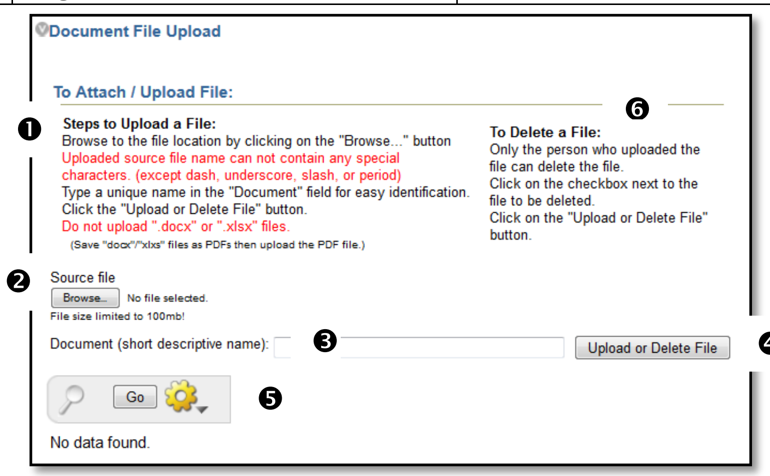
The **Attach/Upload File** utility provides a way to upload supporting documentation to a form associated with the application. Uploading a file using this utility saves a copy of the source file in the application's database.

With the Service Authorization, the documents are associated with the version. This allows different or applicable documents to be uploaded that supports the services listed on that version.

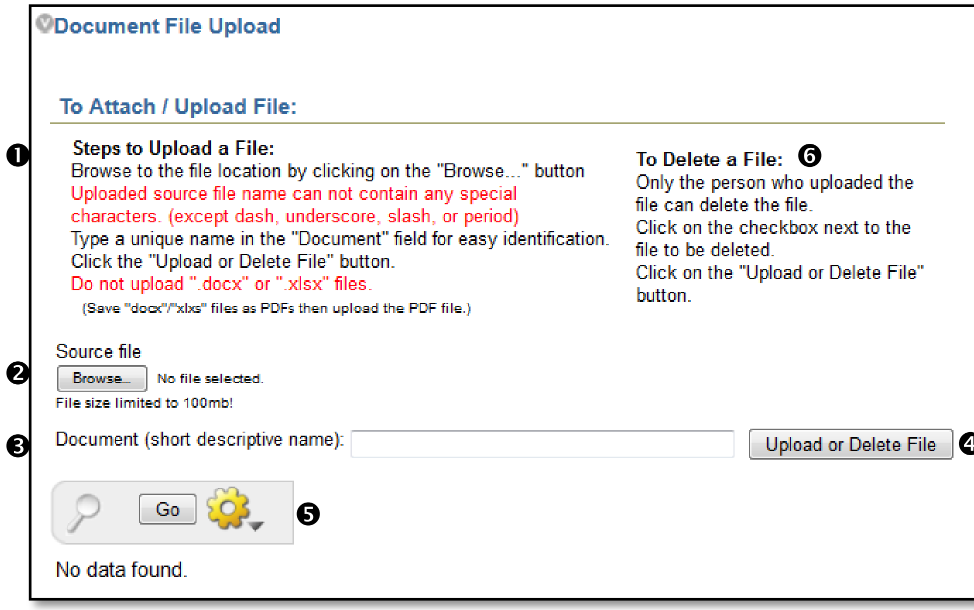
How To

Follow the steps in the table below to access the Attach/Upload File utility.

Step	Action	Result
1.	Click on the Expand Arrow on the Document File Upload Region	Region will expand and Attach / Upload File fields will display.



Sample Form Attach/Upload File page prior to any uploads:



Region	Purpose
❶ Steps to Upload a File:	Instructions for the upload process
❷ Source file / Browse…	The source file path and file name appear here after browsing to/selecting the file
❸ Document (short descriptive name)	A description that provides a simpler name for the file (required)
❹ Upload or Delete File button	Completes the Upload process and makes the uploaded file display in a table list **OR** If an uploaded file is checked in the table list, Deletes the file from the application database it was stored in
❺ Go button/yellow cog wheel	Not used
❻ To Delete a File:	Instructions for Deleting an uploaded file

Continued on next page

Requirements

Source File Name: There are specific rules that must be followed in the naming of the source file that will be uploaded. If necessary, rename the source file before you attempt to upload it.
The source file name can *only* contain the following characters:

- Alpha-numeric characters (A-Z and 0-9)
- The following special characters: dash (-), underscore (_), slash (/), and period (.)

Source File Size: The source file (the file you are uploading) has a maximum file size of 100MB. To conserve KDADS file server space, we request that the source files be saved in a way to reduce the file size as much as possible. For example, if you are scanning a hard copy of a file, make sure your scanner is not using too high of a resolution (200-300 dpi should be sufficient.) Be aware of the size of picture files that are uploaded and resize/compress them if possible. If uploading a PDF file and you have Acrobat Pro, there are optimizing features that can reduce the size of the file.

Source File Type: Most file types are compatible with the Attach/Upload File utility. However, be aware that files that are application-specific may not be accessible if the user opening the file does not have that application installed on their computer. For this reason we recommend the following file types, as they are accessible via multiple image-viewing applications or PDF readers that are common to many business applications:

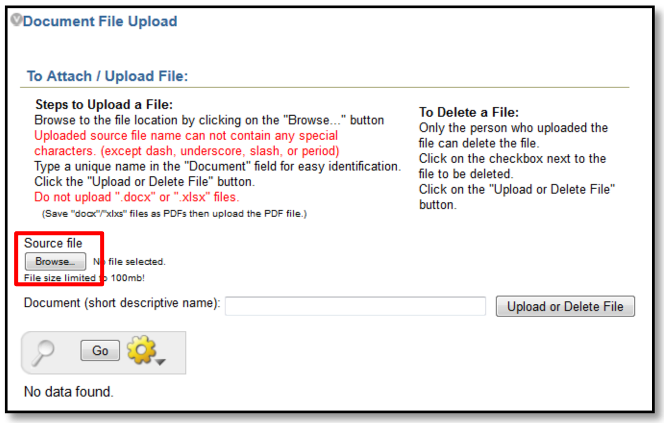
- PDF (current Microsoft Office applications have a built-in 'save as PDF' option now)
- JPG/JPEG (most scanners will scan images to this format)
- BMP (most scanners will scan images to this format. Preferred after JPG/JPEG, as BMP files tend to be larger in size than JPG/JPEG)

Attaching/Uploading Files to a Web Applications Form

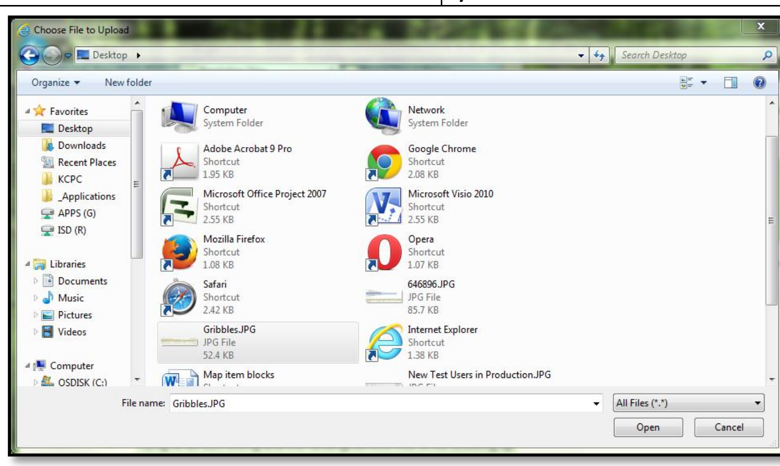
How to Follow the steps in the table below to upload a file using the Attach/Upload File utility.

Prerequisite: You are logged in to Web Applications and have accessed the Attach/Upload File utility in a form/web app page.

Step	Action	Result
1.	Click on the **Browse...** button.	The 'Choose File to Upload' dialog box displays.



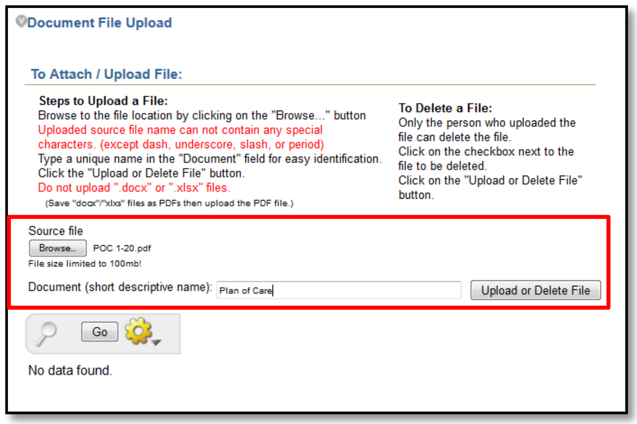
Step	Action	Result
2.	Navigate to the location on your computer or agency network where the file is located.	The desired file name appears in the file list window. Note: Your window may look different based on the file list type you have selected.



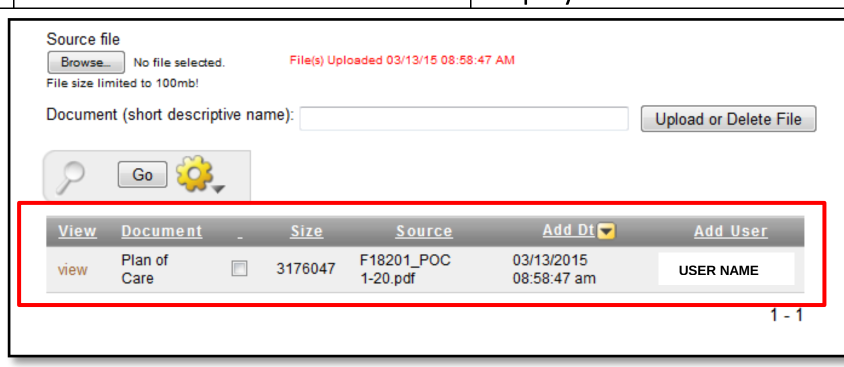
Continued on next page

How to *continued*

Step	Action	Result
3.	Click on the **file** to upload.	The file is highlighted.
4.	Click on the **Open** button	The file name appears in the Source file field.
5.	Enter a short descriptive name in the **Document** field.	There are no character type limitations for this document name.



Step	Action	Result
6.	Click on the **Upload or Delete File** button.	The source file is uploaded to the KDADS file server, and is attached to the application form. A link to the uploaded file, along with other information about the file, displays in an 'attached files' table. Any files that are uploaded to this application form will also display here.

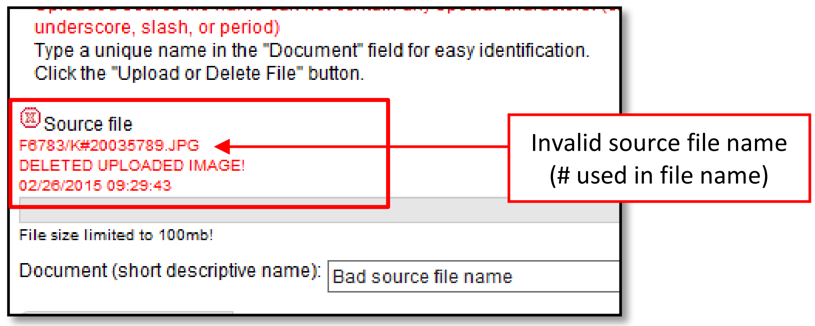


Continued on next page

Attaching/Uploading Files to a Web Applications Form, Continued

Important Note

If the source file you are trying to upload contains invalid characters in the file name, you will receive a message when you attempt to upload the file stating the file has been deleted. The file will not be uploaded and you will need to rename the source file before attempting to upload it again.



Upload Multiple Files

You can upload multiple files to the same form. Repeat the previous steps for each file to be uploaded.

When all files are uploaded, you can continue with the rest of the form, or if the form is complete and saved, you can close the form.

View / Delete Attached Files

View an Attached File

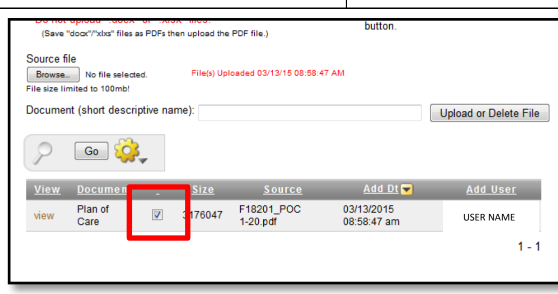
After you have attached a file to a form, you can view it to confirm it uploaded successfully and is accessible.

Step	Action	Result
1.	Click on the file name link in the attached files table.	You may be prompted to either Open *or* Save the file. Choose Open. Depending on your browser settings and the type of file that was uploaded, the file will open in a browser window/tab, or in the application it was created in.
2.	After viewing the attachment, close the window/tab or the appropriate application.	The Attach/Upload Files page redisplays.

Delete an Attached File

If you discover you uploaded the wrong file, or you decide you no longer need the file for the form, you can delete it.

NOTE: Only the user that uploaded the file (the name in the Add User column) can delete the file.

Step	Action	Result
1.	Click on the **check box** under the Delete column in the attached files table.	
		
2.	Click on the **Upload or Delete File** button.	The attached file is deleted from the form and the attached files table.