



## Adding Prescribing Provider NPI and Medicaid Numbers to Service Authorizations

### Step 1: Setting the User Profile of the Prescribing Provider





#### Updating Existing Providers

- If the provider already exists in EasyTrac, search for the provider via the Users tab on the Main Menu then select their name to enter into their profile.

On Behalf Of	Cal	CP	Name	School(s)	Students	Title	User Type	E-mail Address
		<input type="radio"/>	Authorizing Provider 1	-All-	0, 2		Related Service Provider	

- Within the personal information section for the Provider, there are two fields, “NPI Number” and “Medicaid Provider ID”. Complete each field with the appropriate number for the provider and select “Update the Database” at the bottom of the page. **Both fields must be complete and accurate.**

**\*Note:** The User Type for the Provider can be Access Administrator, School System Administrator, or Related Service Provider.

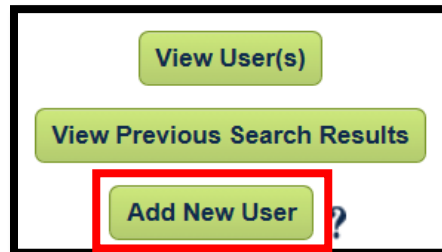
<b>User Type:</b>	Related Service Provider *  
<b>Schools:</b>	Authorizing Provider 1 is associated with all Schools
 <b>NPI Number:</b>	<input type="text" value="1276908404"/>
 <b>Medicaid Provider ID:</b>	<input type="text" value="1040895970002"/>

- The services that the Provider can authorize must also be selected as “Can Provide”. Click the checkbox for each applicable service the Provider can authorize and select “Update the Database” at the bottom of the page. Selection of services the Provider can authorize must be in appropriate accordance with Licensing for that provider.

Related Services					
Services:	Can Provide	Approver/Supervisor	Supervisor	Certified	Certifications
Audiology	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Manage Supervisors</a>		<a href="#">View</a>
EI-Audiology	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Manage Supervisors</a>		<a href="#">View</a>
EI-Nursing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Manage Supervisors</a>		<a href="#">View</a>

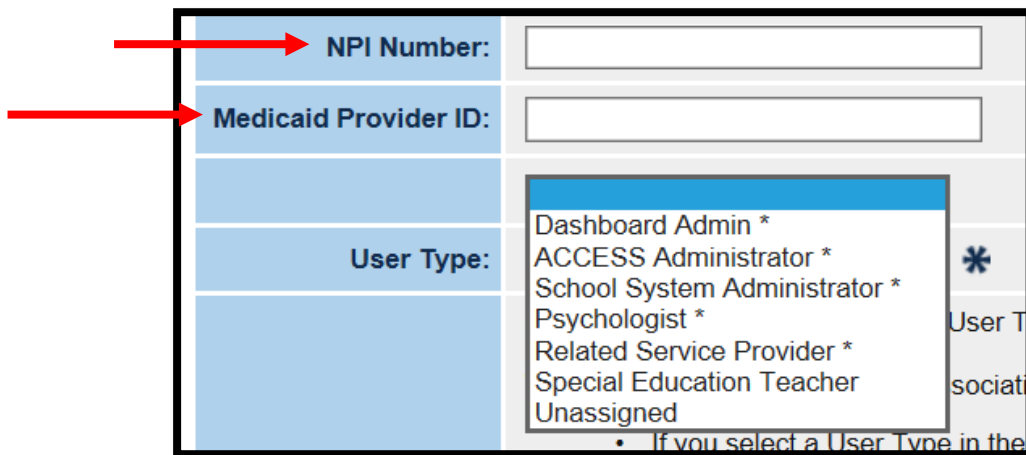
### Adding New Providers

- If the Provider does not currently exist in EasyTrac, you may add a new user by selecting the Users tab on the Main Menu of EasyTrac. Then, select “Add New User” from the bottom of the page.



- Complete the required fields in the Providers Personal Information section. At the bottom of this section are two fields for “NPI Number” and “Medicaid Provider ID”. Complete these fields with the appropriate numbers for the Provider and select “Update the Database” at the bottom of the page. **Both fields must be complete and accurate.**

**\*Note:** The User Type for the Provider can be Access Administrator, School System Administrator, or Related Service Provider.

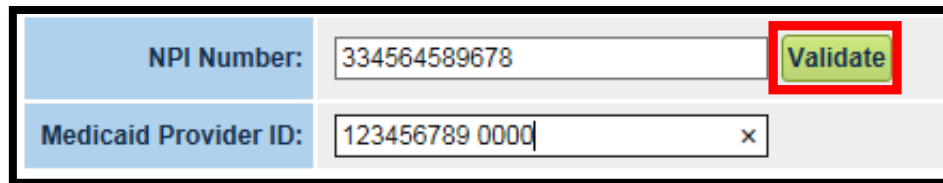

 A screenshot of the 'Providers Personal Information' form. It has several fields: 'NPI Number:', 'Medicaid Provider ID:', and 'User Type:'. Red arrows point to the 'NPI Number:' and 'Medicaid Provider ID:' fields. The 'User Type:' dropdown menu is open, showing options: 'Dashboard Admin \*', 'ACCESS Administrator \*', 'School System Administrator \*', 'Psychologist \*', 'Related Service Provider \*', 'Special Education Teacher', and 'Unassigned'. A note at the bottom says '\* If you select a User Type in the'.

- The services that the Provider can authorize must also be selected as “Can Provide”. Click the checkbox for each applicable service the Provider can authorize and select “Update the Database” at the bottom of the page. Selection of services the Provider can authorize must be in appropriate accordance with Licensing for that provider.

Services:	Can Provide	Approver/Supervisor
Audiology	<input type="checkbox"/>	<input type="checkbox"/>
Audiology Evaluation	<input type="checkbox"/>	<input type="checkbox"/>

**Step 2: Validating NPI Numbers - NEW**

- After the required fields in the Providers Personal Information section of the User's Tab are completed with the "NPI Number" and "Medicaid Provider ID" you will be able to validate the "NPI Number" for accuracy.
- When adding users or editing user information, a "Validate" button now appears adjacent to the NPI field that will verify the value entered in the "NPI Number" field.

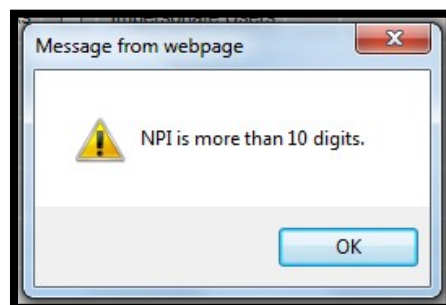
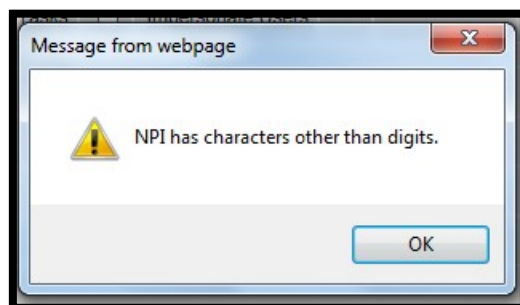
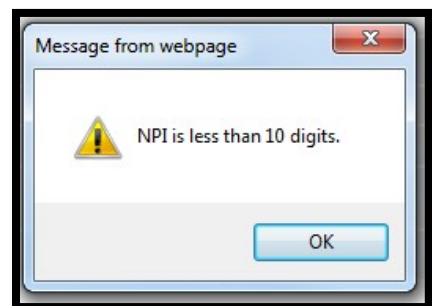
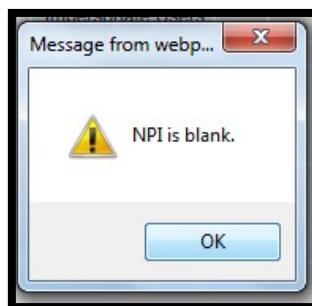
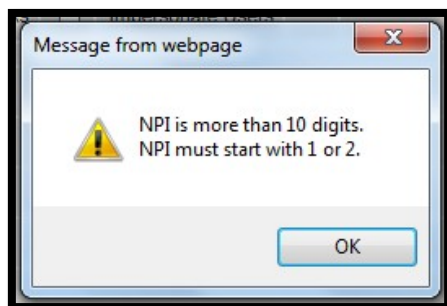


The screenshot shows a form with two input fields. The first field is labeled "NPI Number:" and contains the text "334564589678". To the right of this field is a green button with the text "Validate" in white, which is highlighted with a red rectangular border. The second field is labeled "Medicaid Provider ID:" and contains the text "123456789 0000".

- When selecting the "Validate" button the following verification steps will be used to check the format and content of the NPI Number. When the validation is complete a dialog box appears listing any errors with the NPI number or confirming that it is valid. If applicable, more than one error will be listed in a message.

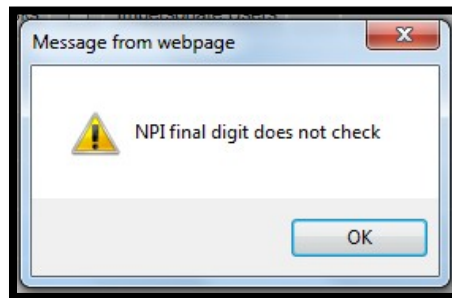
**Format**

- Is the field blank?
- Does the field have more or fewer than 10 digits?
- Does the field contain only numerical digits?
- Does the value start with '1' or '2'?

**Available Error Messages**

**Content** (checked only if format validates):

- Does the final digit check with the first 9 according to CMS regulations?



**Valid**

- If all of the format and content requirements are met a validation message will be displayed.




**\*Note:** The same validations will be performed when User information is imported. If there is a problem with the NPI, a **WARNING** is listed for that row in the import file with the heading: '**NPI check failed**' and listing the verifications that failed. WARNINGS will appear in the following format:


- WARNING: NPI check failed '345678' NPI is less than 10 digits. NPI must start with 1 or 2. User: 'RJONES' (line 2) (ID='RJONES')
- WARNING: NPI check failed '15679SDFG7' NPI has characters other than digits. User: 'JTestUser' (line 3) (ID='JTestUser')
- WARNING: NPI check failed '334564589678' NPI is more than 10 digits. NPI must start with 1 or 2. User: 'KTestUser' (line 4) (ID='KTestUser')

### Step 3: Adding the Service Authorization

- Search for a student via the Student tab on the Main Menu. Select the students name to enter into their profile.

Select a Student											
CP	Last Elig	Last IEP	School	Grade	Name	Student ID	PA Secure ID	Age	Date of Birth	Dis	Case Manager
	09/04/2013	07/18/2016	BCIU Ben	5	Tina Test	0268026802	0268026802	18 Years	01/25/1998	ID	

- From the Student sub-menu, select the “Compliance Data” tab

Main Menu | Students | Wizards | Schools | Reports/School System | Users | My Info | My Calendar |  | BCG | Training Videos

Students | Personal | Parents | Team | Special Education Eligibility | Related Services | Documents | Compliance Data

**Personal Information**  
 View: Workspace

**Tina Test**

- Select “Medical Authorization” from the “Compliance Data” Menu

 **Special Education**

 **Medical Authorization**

 **Parental Consent**

- The students listed Related Services will appear. If a service does not appear, select the “Related Services” tab from the Students sub-menu to add any additional Related Services.

- Authorizations can now be added for more than one (1) service at a time. To add an authorization to multiple services, select the check box next to each service or utilize the “Check All”/”Check None” options. Select “Add Order” to enter the Authorization dates.

Add Medical Authorization for Selected		Related Service	Service Dates Start/End	Group Size	Amount of Service	Doctor Authorization
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Physical Therapy			minutes per Day	07/09/2016 07/10/2016
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Personal Care Assistant			minutes per Day	07/03/2016 07/04/2016
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Audiology - LOG HERE			minutes per Day	08/03/2016 08/04/2016

- Any existing Medical Authorizations listed for the student will appear in the table at the top of the page.

Existing Medical Authorization Records					
Service(s)	Start Date	End Date	Authorized By	NPI	Medicaid ID
Audiology	07/27/2016	07/27/2017			
Audiology	07/28/2016	07/27/2017			

- To add new Authorization Dates, enter the Authorization Begin Date and End Date. Then, select the applicable Authorizing Provider from the “Authorized By” drop down box.

**\*Note:** If the Providers profile does not contain all of the required elements for Authorizing (“NPI Number”, “Medicaid Provider ID”, and “Can Provide” for the applicable services), the providers name will **NOT** appear in the “Authorized By” drop down box. The Providers profile will need to be updated accordingly.

Add a New Medical Authorization Record	
Medical Authorization Signature/Begin Date	Medical Authorization End Date
<input type="text"/>	<input type="text"/>
Authorized By:	<div> <div>Authorizing Provider 1 - Audiology, Personal Care Assistant, Physical Therapy</div> <div>Authorizing Provider 2 - Audiology, Physical Therapy</div> <div>Mark Test2 - Physical Therapy</div> </div>
NPI:	<input type="text"/>
<input type="button" value="Add Order"/>	
<input type="button" value="Back to Menu"/>	

- The “NPI Number” and “Medicaid ID number”, as listed in the Provider profile, will appear automatically in the appropriate fields. These fields can **NOT** be edited and are only for reference when adding authorization dates. If they need to be edited, this can be done by accessing the “Users” tab on the Main Menu and selecting the appropriate providers name.



**\*Note:** The Authorization will only be added for the services the provider is listed as “Can Provide” per their profile. For example, if you selected to add authorizations to Audiology, Personal Care Assistant, and Physical Therapy, but the provider is only listed as “Can Provide” to authorize Physical Therapy then only an authorization for Physical Therapy will be added.

- Select “Add Order” to add the Authorization and all applicable dates to the table. The new Authorization will then be added to the “Existing Medical Authorization Records” Table.

Existing Medical Authorization Records						
Service(s)	Start Date	End Date	Authorized By	NPI	Medicaid ID	
Audiology	07/27/2016	07/27/2017				
Audiology	07/28/2016	07/27/2017				
Audiology, Personal Care Assistant, Physical Therapy	08/01/2016	07/30/2017	Authorizing Provider 1	1276908404	1040895970002	