# SOURCE Search and File Attachment

## Purpose

SOURCE providers have access to a comprehensive search functionality in order to find and view Level of Care and Placement information for previously submitted requests associated with their provider ID.   Providers may also attach documents to SOURCE Level of Care and Placement requests that have a status of *Pending.*
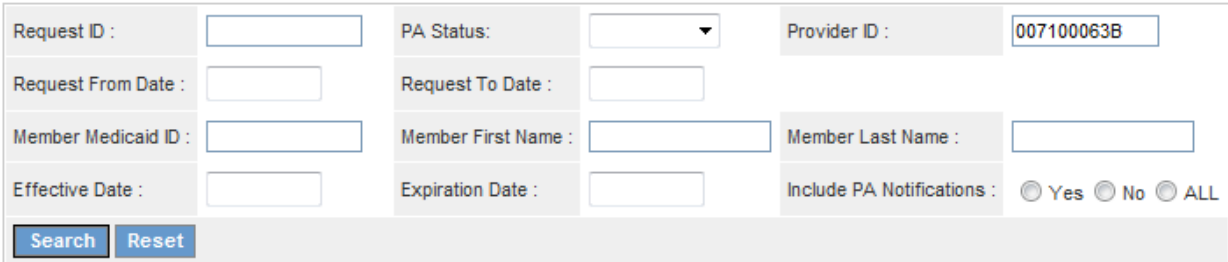
Providers may search using any of the following parameters.

- **Request ID:**  The unique 12 digit number assigned by the system to every request entered in the Prior Authorization (PA) system.

- **PA Status**:  The overall status of the request, which may be Pending, Approved, or Denied.

- **Provider ID**:  The Provider ID populated by the system based on web portal login credentials; or based on the Provider ID 'switched to' after the provider logs into the portal.

- **Request 'From' Date and Request 'To' Date**:  Request Date is the date that the PA was entered into the PA system.  Search by these date parameters to find PAs entered within a specified time period.

- **Member Medicaid ID**:  The Member's Medicaid ID number.

- **Member First Name and Last Name**:  The Medicaid recipient's first name and last name.

- **Effective Date:**  The Effective Date is the date that the authorization period begins.

- **Expiration Date**:  The Expiration Date is the date that the authorization period ends.

- **PA Notifications:**  Notifications regarding PA status posted to the Level of Care/Placement Review Request page.  Yes = request with a notification; No = no notification; All = all requests with and without a notification.

# Search Instructions

1. Open the *Provider Workspace*.

2. Click **Search, Edit or Attach Documentation to Requests.**

3. The *Prior Authorization Request Search* page opens. The Provider ID is populated by the system based on the provider's portal login.

   **Note:** Be sure the provider ID that the system inserts matches the provider ID on the LOC and Placement that is the subject of the search. If it doesn't match, the search will not return any results.
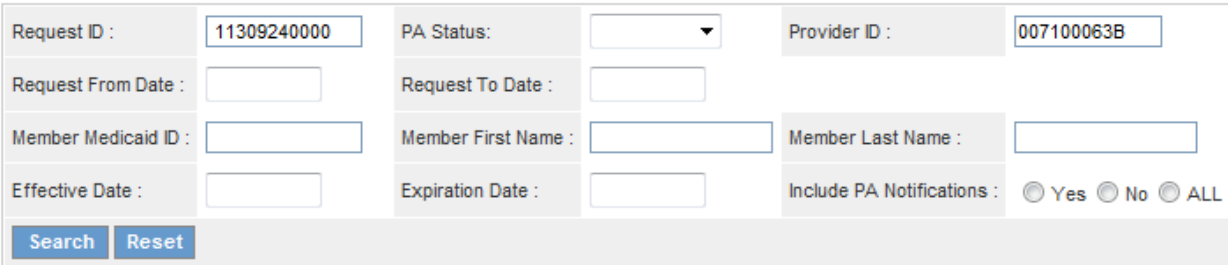


**Figure 1**

4. Enter the 12 digit system assigned request number in the 'Request ID' box. This is the quickest way to search and the preferred method.

5. Don't enter any other data.



**Figure 2**

6.  Click **Search** to activate the search.  The Level of Care and Placement will display below the search fields.



**Figure 3**

**Note:**  If for some reason, the 'Request ID' is not available, a search may be conducted using other parameters but the search may return multiple results depending on the search parameters used (refer to the search parameter definitions).  For example, a search may be conducted using the 'Provider ID' and 'Request From Date'.  Since the request date is the date the level of care/placement was entered via the portal; the search will return all cases entered on the request from date and forward that are associated with the specific provider ID.  To limit the results, add the member's Medicaid ID as a search parameter.

7.  To access the Level of Care and Placement listed in the search results, click the **Request ID**, underlined and in blue font.  This action opens the Level of Care and Placement *Review Request* page.

## Attach File Instructions

Files may be attached from the *SOURCE Level of Care and Placement Review Reques*t page.  Some general attachment guidelines apply:

- Individual records/files up to 20 MB may be attached.  Large files may need to be divided into two or three files and attached separately.
- Multiple files may be attached but each file must be attached separately.
- The following file types may be attached:  TXT, DOC, DOCX, PDF, TIF, TIFF, EXCEL, JPG, JPEG, and JPE.
- Do not include the following symbols in the file name:  / \ # < > ' "
- Do not include periods in the file name, except before the file type (as in .PDF).
- If more than one file is attached for the same member, the file names must be different.

1.  To attach a document, click the **Attach File** button.

**Figure 4**

2. On the page that opens, go to the **Create an Attachment** section. This section includes checkboxes that correspond to required documents. The purpose of the checkboxes is to associate the actual file attached with a specific document type. One file may be attached for all the document types or separate files may be attached for each document type.

**Figure 5**

3. Select the checkboxes applicable to the file to be attached; or check all the boxes if one file is to be attached for all the document types.

   **Note:** It is not necessary to check a box in order to attach a file but a checkbox or boxes should be selected when attaching the specific required documents.



**Figure 6**

4. Click **Browse** to open the file directory.

5. Find the file that is to be attached.  Select the file by double clicking the file, or highlight the file and then click **Open**.



**Figure 7**

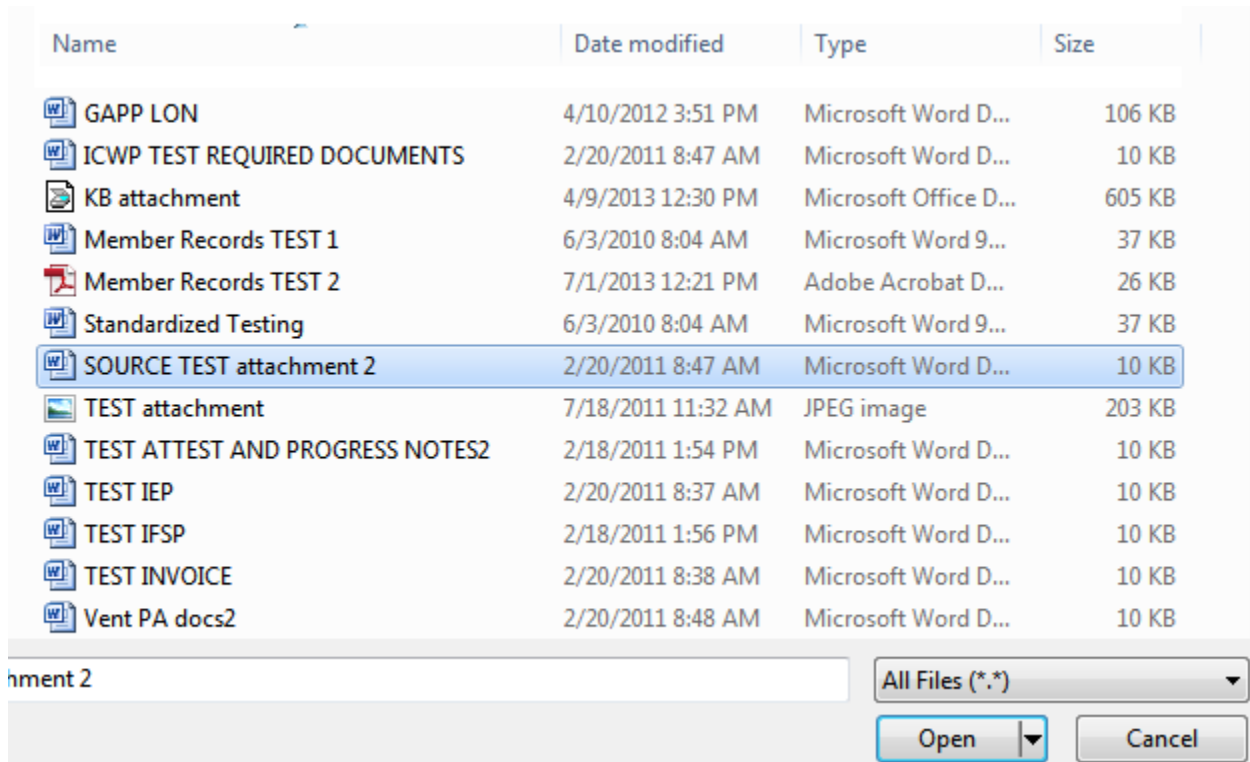6. Once the file is selected, the file name/path displays in the box next to browse.
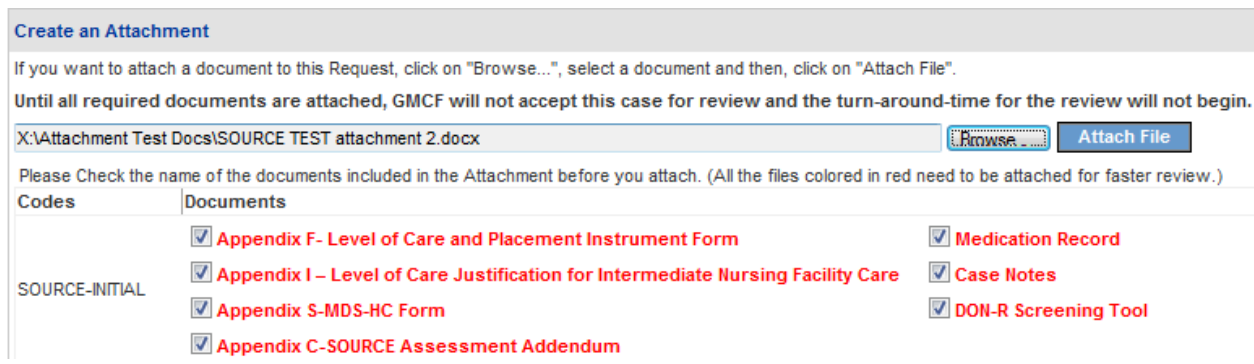


**Figure 8**

7. Click the **Attach File** button.  If the file is uploaded, the 'File uploaded successfully' message displays; and the attached document displays in the **Attached Files** table and is associated with the document checkbox selected.

**File uploaded successfully.**
Please Check the name of the documents included in the Attachment before you attach. (All the files colored in red need to be attached for faster review.)

| Codes | Documents | |
|-------|-----------|--|
| SOURCE-INITIAL | ☐ Appendix F- Level of Care and Placement Instrument Form | ☐ Medication Record |
| | ☐ Appendix I – Level of Care Justification for Intermediate Nursing Facility Care | ☐ Case Notes |
| | ☐ Appendix S-MDS-HC Form | ☐ DON-R Screening Tool |
| | ☐ Appendix C-SOURCE Assessment Addendum | |

**Attached Files**

| File | Type | Code | Document Name | Size | User | Date | |
|------|------|------|---------------|------|------|------|--|
| SOURCE TEST attachment 2.docx | Web Upload | SOURCE-INITIAL | Appendix C-SOURCE Assessment Addendum | 10 KB | LUMA1 | 9/24/2013 9:34:51 AM | DELETE |
| SOURCE TEST attachment 2.docx | Web Upload | SOURCE-INITIAL | Appendix F- Level of Care and Placement Instrument Form | 10 KB | LUMA1 | 9/24/2013 9:34:51 AM | DELETE |
| SOURCE TEST attachment 2.docx | Web Upload | SOURCE-INITIAL | Appendix I – Level of Care Justification for Intermediate Nursing Facility Care | 10 KB | LUMA1 | 9/24/2013 9:34:51 AM | DELETE |
| SOURCE TEST attachment 2.docx | Web Upload | SOURCE-INITIAL | Appendix S-MDS-HC Form | 10 KB | LUMA1 | 9/24/2013 9:34:51 AM | DELETE |
| SOURCE TEST attachment 2.docx | Web Upload | SOURCE-INITIAL | Case Notes | 10 KB | LUMA1 | 9/24/2013 9:34:51 AM | DELETE |
| SOURCE TEST attachment 2.docx | Web Upload | SOURCE-INITIAL | DON-R Screening Tool | 10 KB | LUMA1 | 9/24/2013 9:34:51 AM | DELETE |
| SOURCE TEST attachment 2.docx | Web Upload | SOURCE-INITIAL | Medication Record | 10 KB | LUMA1 | 9/24/2013 9:34:51 AM | DELETE |

**Figure 9**

8. To attach other files, repeat the same attachment procedure.

9. To return to the main Review Request page, click **Back** at the bottom of the page.