

KS WORK UnitedHealthcare: Guide to Creating Carryover Authorizations in the Web Portal

The purpose of this guide is to walk you through the process of creating authorizations in a participant's carryover budget. If you have any questions about when it is appropriate to create a carryover authorization, please view the Carryover Authorizations Frequently Asked Questions located at publicpartnerships.com.

1. The first thing to do is type in the web address provided below into your browser (it is recommended that you "favorite" this address in your web browser): <http://fms.publicpartnerships.com>
2. Use this screen to log into the BetterOnline™ Web Portal.

PPL Login

User Name:

Password:

Save Your User Name On This Computer

[Online User Registration](#)
[Forgot Username or Password](#)
[Download Adobe Acrobat Reader](#)

PPL Overview

Public Partnerships, LLC (PPL) was established in 1999 as an affiliate of Public Consulting Group (PCG), a management consulting firm. PCG has been consulting to the public sector since 1986 and focuses on improving financial management and operations of publicly-funded health care, education, and human service programs. PCG employs 950 staff members in 31 offices across the U.S., in Montreal, Canada, and in Lodz, Poland, with experience in all 50 states. PPL was initially formed to provide assistance to the Robert Wood Johnson Foundation's national pilot demonstrations in Self-Determination. PPL offers a rich array of financial management and related administrative services to public agencies and participants seeking to develop consumer-directed services and supports. Currently, PPL serves more than 35,000 consumers in 20 states and the District of Columbia.

3. Select your program and role.

Program and Role Selector

You have access to more than one program. Please select a program and role you want to use.

Program:

Role:

4. Once in the Portal, you will default to the "Participant Search Page". To find a participant's profile, enter any identifying search criteria to find the participant for whom you plan to create the authorization.

Participant Search

Participant Last Name:

Participant First Name:

Participant PPL ID:

Medicaid ID:

SSN:

EIN Number:

Employer First and Last Name:

ILC Last Name:

Participant	Participant PPL ID	Medicaid ID	Birth Date	Good To Serve	Employer of Record Name	Employer IIC	Independent Living Counselor	Service Coordinator	Phone	Participant Profile	Authorization
TESTCONSUMERH, GA	C000291	3333333333	12/14/1982	Yes	GA TESTCONSUMERH	012345678	TESTILC_QATESTLC2		123-123-1234	Participant Profile	Authorization

5. Once the results of your search return, you will see a link to Authorization. Click on this link.

Participant Profile	Authorization
Participant Profile	Authorization

6. Here you will see the Budget Summary page for the participant you selected.

Budget Summary for QA TESTCONSUMEREH (ID#987654123)

Budget Period: 11/1/2013 - 3/30/2014

Monthly Budgets:

Id	Creation Date	Start	End	Amount	Allocated	Total Swept	Spent	Balance	Detail	Action
4950000	9/30/2013	11/1/2013	11/30/2013	\$1,000.00	\$900.00	\$0.00	\$0.00	\$900.00	Budget Detail	
4960000	9/30/2013	12/1/2013	12/31/2013	\$1,000.00	\$900.00	\$0.00	\$0.00	\$900.00	Budget Detail	
4970000	9/30/2013	1/1/2014	1/31/2014	\$1,000.00	\$925.00	\$0.00	\$0.00	\$925.00	Budget Detail	
4980000	9/30/2013	2/1/2014	2/28/2014	\$1,000.00	\$700.00	\$0.00	\$0.00	\$700.00	Budget Detail	
4990000	9/30/2013	3/1/2014	3/30/2014	\$967.74	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	
Total Budget				\$4,967.74	\$3,425.00	\$0.00	\$0.00	\$3,425.00		

7. Scroll to the bottom of the page to view the carryover budget. Here you will see the funds that have accumulated.

Carryover Budget:

Id	Total Carryover	Authorizations	Approved Authorizations	Spent	Detail
550000	\$724.00	\$0.00	\$0.00	\$0.00	Budget Detail

8. To create an authorization, click on the link in the Detail column that reads “Budget Detail”. It will take you to the budget detail page. Click on the “Create New Authorization” button.

Budget Detail For QA TESTCONSUMEREH (ID#987654123)

[Show/ Hide filter](#)

Service Type: Status:

Creation Date Between: And

There are no authorizations for this participant.

1-0 Show records at a time.

9. A pop-up screen will appear to create the Authorization.

Create New Authorization (* required)

Please enter the following information to request a new Authorization

* Service Category:

* Service Type:

Notes/Comments:

* Start Date: * Dollars:

* End Date:

10. The first drop down is the Service Category. There are four different service categories that may be authorized for carryover funds: Alternative Services, Personal Assistant Services, Background, and Carryover Funds (For more information on these service categories and when they can be used, please refer to the “A UHC Admin’s Guide to Service Authorization Codes” guide on publicpartnerships.com). Select the Service Category for the authorization.

The screenshot shows the 'Create New Authorization (* required)' form. The title bar is blue with the text 'Create New Authorization (* required)'. Below the title bar, it says 'Please enter the following information to request a new Authorization'. The form contains the following fields:

- * Service Category: Carry Over Funds (dropdown menu)
- * Service Type: - Select - (dropdown menu)
- Notes/Comments: (text area)
- * Start Date: 1/1/1900 (text input)
- * End Date: 12/31/2900 (text input)
- * Dollars: (text input)

 At the bottom, there are 'Create' and 'Cancel' buttons.

11. Once you select the Service Category, you must select the Service Type.

The screenshot shows the 'Create New Authorization (* required)' form. The title bar is blue with the text 'Create New Authorization (* required)'. Below the title bar, it says 'Please enter the following information to request a new Authorization'. The form contains the following fields:

- * Service Category: Carry Over Funds (dropdown menu)
- * Service Type: - Select - (dropdown menu, currently open showing options: COAD: Advertising, COINS: Health insurance, COLEAVE: Sick or vacation leave)
- Notes/Comments: (text area)
- * Start Date: 1/1/1900 (text input)
- * End Date: 12/31/2900 (text input)
- * Dollars: (text input)

 At the bottom, there are 'Create' and 'Cancel' buttons.

12. After you choose the Service Category and Service Type, you have the option of entering any notes about the Authorization. Please note that any comments that you write are purely for your benefit but are visible to other Web Portal users who can see the participant’s budget. The KS WORK program, through PPL does not read or take into consideration the notes when processing timesheets or invoices.

The screenshot shows the 'Create New Authorization (* required)' form. The title bar is blue with the text 'Create New Authorization (* required)'. Below the title bar, it says 'Please enter the following information to request a new Authorization'. The form contains the following fields:

- * Service Category: Carry Over Funds (dropdown menu)
- * Service Type: COAD: Advertising (dropdown menu)
- Notes/Comments: Advertising for new provider (text area)
- * Start Date: 1/1/1900 (text input)
- * End Date: 12/31/2900 (text input)
- * Dollars: (text input)
- Available Funds: \$724.00 (text label)

 At the bottom, there are 'Create' and 'Cancel' buttons.



13. Finally, enter a dollar amount for the authorization. Above the dollar amount, you will see the amount of available funds. You may not enter a dollar amount that is higher than the available funds.

The screenshot shows the 'Create New Authorization (* required)' form. The title bar is blue with the text 'Create New Authorization (* required)'. Below the title bar, it says 'Please enter the following information to request a new Authorization'. The form contains the following fields:

- * Service Category: Carry Over Funds (dropdown menu)
- * Service Type: COAD: Advertising (dropdown menu)
- Notes/Comments: Advertising for new provider (text area)
- * Start Date: 1/1/1900 (text input)
- * End Date: 12/31/2900 (text input)
- * Dollars: 40 (text input)
- Available Funds: \$724.00 (text label)




 At the bottom, there are 'Create' and 'Cancel' buttons.

14. The Start and End date of the authorization will automatically pre-populate to 1/1/1900 and 12/31/2900 respectively. Please change this date range to be the start/end date of the specific month the service is to be provided. This will control that the funds are only spent for services provided during that time period. If you are not sure yet which month(s) the participant will purchase the service in, you can leave the dates as they pre-populate and edit and update them later.
15. Click “Create”. The authorization line for a portion of the budget has been created. Please note that the authorization is in submitted status; you will need to have the participant’s UHC Care Coordinator approve the authorization before the KS WORK program, through PPL can use the funds to pay out timesheets and invoices.

Service	Authorization ID	Start Date	End Date	Authorization Amount	Paid Dollars	Invoiced Dollars	Swept Dollars	Balance	Note	Status	Actions
COAD: Advertising	AUL0005609	1/1/1900	12/31/2900	\$40.00	\$0.00	\$0.00	\$0.00	\$40.00	Advertising for new provider	Submitted	  
Total				\$40.00	\$0.00	\$0.00	\$0.00	\$40.00			

16. If you need to continue creating carryover authorizations, click on “Create New Authorization” and repeat the above steps.
17. On the Budget Detail page for the participant, there are also options under the Action column for each line to:
 - Display Detail
 - Edit this line
 - Delete this line

18. Once the line’s status is “Approved” by the participant’s Care Coordinator, invoices and timesheets that correspond to those authorizations lines can be paid.

Service	Authorization ID	Start Date	End Date	Authorization Amount	Paid Dollars	Invoiced Dollars	Swept Dollars	Balance	Note	Status	Actions
COAD: Advertising	AUL0005609	1/1/1900	12/31/2900	\$40.00	\$0.00	\$0.00	\$0.00	\$40.00	Advertising for new provider	Approved	  
Total				\$40.00	\$0.00	\$0.00	\$0.00	\$40.00			

Thank you for using this guide to successfully create carryover authorizations for WORK participants whom you work with! If you have any questions, please contact us a 1-877-908-1747 or at pplks-unitedhealthcare@pcgus.com.