

Guide to Entering Service Authorizations

As an Independent Living Counselor (ILC) user, you will be able to create service authorization lines for participants after your Service Coordinator creates the participant's monthly allocations. The purpose of this guide is to walk you through the process of creating these service authorizations. It is important that these authorizations be entered accurately, as any errors will result in delays of payment.


1. Open web browser (e.g., Chrome, FireFox, Internet Explorer)
2. Enter the following URL into the web browser:
<http://fms.publicpartnerships.com/PPLPortal/login.aspx>
3. Select the Login button and enter your login credentials.

- **NOTE:** You may be an ILC with access to multiple Kansas Portals. **It is important that you make sure you are in the KS AETNA Portal.** You will not be able to find your participants if you are in the incorrect Portal.

4. Click on the “Participant Search” hyperlink.

5. Enter any identifying search criteria into the “Participant Last Name” box and click the search button. This will allow you to find the participant for whom you plan to create the authorization. In this example, our participant is QA Test.

Participant Search

Participant Last Name: 

Participant First Name:

Participant PPL ID:

Medicaid ID:

SSN:

EIN Number:

Employer First and Last Name:

I,C Last Name:

Participant	Participant PPL ID	Medicaid ID	Birth Date	Good To Serve?	Employer of Record Name	Employer No	Independent Living Counselor	Care Coordinator	Phone	Participant Profile	Authorization
TESTCONSUMEREN, GA	C000291	3333333333	12/14/1982	Yes	QA TESTCONSUMEREN	012345678	JOHNS BARTH	SMITH, JENNIFER		Participant Profile	Authorization
TESTJRS9, GA	C000426			No		Pending		WADMAN		Participant Profile	Authorization
TESTJRS9, GA	C000424			No		Pending				Participant Profile	Authorization
TESTJRI01, GA	C000427			No		Pending				Participant Profile	Authorization
TEST, GA	C000426			No		Pending				Participant Profile	Authorization

6. Once you find the participant that you are searching for, look for a hyperlink titled “Authorization” on the far right of the results page. Click on this link.

Participant Profile	Authorization
Participant Profile	Authorization 

7. This takes you to the Budget Summary page for the participant you selected.

Budget Summary for QA Test (ID#C000426)

Budget Period:

Monthly Budgets:

Id	Creation Date	Start	End	Amount	Allocated	Total Swept	Spent	Balance	Detail	Action
530000	10/23/2013	10/1/2013	10/31/2013	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	
540000	10/23/2013	11/1/2013	11/30/2013	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	
550000	10/23/2013	12/1/2013	12/31/2013	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	
560000	10/23/2013	1/1/2014	1/31/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	
570000	10/23/2013	2/1/2014	2/28/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	
580000	10/23/2013	3/1/2014	3/31/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	
590000	10/23/2013	4/1/2014	4/30/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	
600000	10/23/2013	5/1/2014	5/31/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	

- NOTE: If you see the image below, then your Service Coordinator has not created a budget. Do not enter anything into these boxes; instead, contact your Service Coordinator to have them enter in the Budget Period.

Participant First Name: QA
 Participant Last Name: Test
 Participant ID: C000426

Budget Amount:

Start Date:

























End Date:

8. The **Monthly Budgets** column lists each month covered by this budget. The **Allocated** column will show \$0.00. Authorizations need to be created for services within this monthly budget.

Budget Summary for QA Test (ID#C000426)

Budget Period: 10/1/2013 - 9/30/2014 [Create New Budget Period](#)

Monthly Budgets:

Id	Creation Date	Start	End	Amount	Allocated	Total Swept	Spent	Balance	Detail	Action
530000	10/23/2013	10/1/2013	10/31/2013	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 
540000	10/23/2013	11/1/2013	11/30/2013	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 
550000	10/23/2013	12/1/2013	12/31/2013	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 
560000	10/23/2013	1/1/2014	1/31/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 
570000	10/23/2013	2/1/2014	2/28/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 
580000	10/23/2013	3/1/2014	3/31/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 
590000	10/23/2013	4/1/2014	4/30/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 
600000	10/23/2013	5/1/2014	5/31/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 
610000	10/23/2013	6/1/2014	6/30/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 
620000	10/23/2013	7/1/2014	7/31/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 
630000	10/23/2013	8/1/2014	8/31/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 
640000	10/23/2013	9/1/2014	9/30/2014	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 

9. To do this, click on the link in the Detail column that reads “Budget Detail”.

Id	Creation Date	Start	End	Amount	Allocated	Total Swept	Spent	Balance	Detail	Action
530000	10/23/2013	10/1/2013	10/31/2013	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Budget Detail	 

- This will take you to a screen where you can choose to “Create New Authorization”. Click on the first button to “Create New Authorization”.

Budget Detail For QA Test (ID#C000426)

[Show/ Hide filter](#)

Service Type: Status:

Creation Date Between: And

There are no authorizations for this participant.

1-0 Show records at a time

10. 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:

11. The first dropdown is the Service Category. As you are allocating the regular monthly Budget, and not any carryover funds, you will only see the options for “Alternative Services”, “Background” and “Personal Assistant Services”. In our example, we are going to choose Personal Assistant Services.

The screenshot shows a web form titled "Create New Authorization (* required)". Below the title is the instruction "Please enter the following information to request a new Authorization". The form contains several fields: a dropdown for "Service Category" with a menu open showing "Alternative Services", "Background", and "Personal Assistant Services" (which is highlighted); a dropdown for "Service Type" with a menu open showing "Alternative Services", "Background", and "Personal Assistant Services"; a text field for "Notes/Comments"; a date field for "Start Date" with the value "10/1/2013"; a date field for "End Date" with the value "10/31/2013"; and a text field for "Dollars". At the bottom are "Create" and "Cancel" buttons.

12. Once you select the Service Category, you must select the Service Type. Select PAS: Personal Assistant Services. (NOTE: There are multiple Service Type selections for the three Service Categories. For a guide to what the service type codes represent, please see our “Authorization Codes-Quick Reference” that is located on the program webpage at www.publicpartnerships.com):

This screenshot shows the same form as above, but with "Personal Assistant Services" selected in both the "Service Category" and "Service Type" dropdowns. The "Notes/Comments" field now contains "PAS: Personal Assistant Services". The "Start Date" is "10/1/2013" and the "End Date" is "10/31/2013". A new field, "Available Funds: \$3,000.00", has appeared next to the "Start Date" field. The "Dollars" field is still empty. "Create" and "Cancel" buttons are at the bottom.

This screenshot shows the form with "Alternative Services" selected in the "Service Category" dropdown. The "Service Type" dropdown menu is open, displaying a list of options: "APPLIANCE: Home appliance", "HOUSEKEEP: Housekeeping service", "LAUNDRY: Laundry service", "MEALS: Meal service", "MONITOR: Emergency monitoring", "MONITORINS: Emergency monitoring Installat", "OTHER: Other", "SNOWMOW: Snow removal or mowing Service", "TRANSPORT: Transportation service", and "WORKSPRT: Employment support". The "Start Date" is "10/1/2013" and the "End Date" is "10/31/2013". The "Dollars" field is empty. "Create" and "Cancel" buttons are at the bottom.

13. After you choose the Service Category and Service Type, you have the option of entering any notes about the Authorization. These notes are **not necessary** for processing timesheets, but they are a useful reference for you and your Service Coordinator. Then, you will allocate the amount of the budget that will go towards these services. In the example below, I allocated \$2,700 of the \$3,000 budget toward Personal Assistant Services. NOTE: The service category Personal Assistant Services includes both agency and self-directed PA services.
- **Do not make multiple authorizations for the same service code; this will affect payment of invoices and timesheets.**

Create New Authorization (* required)

Please enter the following information to request a new Authorization

* Service Category:

* Service Type:

Notes/Comments:

* Start Date: Available Funds: **\$3,000.00**

* End Date: * Dollars:

14. Click “Create”. The authorization line for a portion of the budget has been created.

Budget Detail For QA Test (ID#C000426)

[Show/ Hide filter](#)

Service Type: Status:

Creation Date Between: And

Service	Authorization ID	Start Date	End Date	Authorization Amount	Paid Dollars	Invoiced Dollars	Swept Dollars	Balance	Note	Status	Actions
PAS: Personal Assistant Services	AUL0000017	10/1/2013	10/31/2013	\$2,700.00	\$0.00	\$0.00	\$0.00	\$2,700.00	Notes Here.	Submitted	
Total:				\$2,700.00	\$0.00	\$0.00	\$0.00	\$2,700.00			

15. Click on “Create New Authorization” to continue entering authorizations to allocate the remaining funds in the monthly budget.

Budget Detail For QA Test (ID#C000426)

[Show/ Hide filter](#)

Service Type: Status:

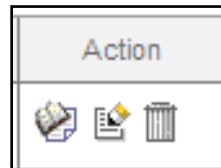
Creation Date Between: And

Service	Authorization ID	Start Date	End Date	Authorization Amount	Paid Dollars	Invoiced Dollars	Swept Dollars	Balance	Note	Status	Actions
MONITOR: Emergency monitoring	AUL0000026	10/1/2013	10/31/2013	\$120.00	\$0.00	\$0.00	\$0.00	\$120.00		Submitted	
TRANSPORT: Transportation service	AUL0000024	10/1/2013	10/31/2013	\$150.00	\$0.00	\$0.00	\$0.00	\$150.00		Submitted	
BACKGROUND: Background Checks	AUL0000022	10/1/2013	10/31/2013	\$30.00	\$0.00	\$0.00	\$0.00	\$30.00		Submitted	
PAS: Personal Assistant Services	AUL0000017	10/1/2013	10/31/2013	\$2,700.00	\$0.00	\$0.00	\$0.00	\$2,700.00	Notes Here.	Submitted	
Total:				\$3,000.00	\$0.00	\$0.00	\$0.00	\$3,000.00			

16. The total line will show the full amount of the monthly budget when you have allocated all of the funds, which is \$3,000 in our example. If you allocate all of the funds in the budget, you will be unable to create any additional authorizations (NOTE: The Service Type box is greyed out and there are no dollars available to allocate).

17. On the Budget Detail page there are options under the Action column for each line, if any changes need to be made.

- Display Detail (book icon)
- Edit this line (pencil icon)
- Delete this line (trashcan icon)



18. Once complete, each line will show in the Status column as “Submitted”. These authorizations need to be approved by your Service Coordinator before payments can be made against them.



19. To view the status of the approvals, you can review the participant’s budget detail. When the authorizations are ready to be spent against, they will show up in Approved status. Once the line’s status is “Approved”, invoices and timesheets that correspond to those authorizations lines can be paid.

Budget Detail For QA Test (ID#C000426)

[Show/ Hide filter](#)




Service Type: Status:

Creation Date Between: And













Service	Authorization ID	Start Date	End Date	Authorization Amount	Paid Dollars	Invoiced Dollars	Swept Dollars	Balance	Note	Status	Actions
MONITOR: Emergency monitoring	AUL0000026	10/1/2013	10/31/2013	\$120.00	\$0.00	\$0.00	\$0.00	\$120.00		Approved	
TRANSPORT: Transportation service	AUL0000024	10/1/2013	10/31/2013	\$150.00	\$0.00	\$0.00	\$0.00	\$150.00		Approved	
BACKGROUND: Background Checks	AUL0000022	10/1/2013	10/31/2013	\$30.00	\$0.00	\$0.00	\$0.00	\$30.00		Approved	
PAS: Personal Assistant Services	AUL0000017	10/1/2013	10/31/2013	\$2,700.00	\$0.00	\$0.00	\$0.00	\$2,700.00	Notes Here.	Approved	
Total				\$3,000.00	\$0.00	\$0.00	\$0.00	\$3,000.00			

Entering Authorizations – Troubleshooting

- If you enter the incorrect service code, you **must** delete the authorization and create a new authorization. **PPL cannot pay out timesheets or invoices if the authorization code does not match the physical code on the submitted timesheet/invoice.** Prompt creation of these revised authorizations will prevent delays in payment to providers.
 - In this example, if you entered the service code MONITOR when you meant to enter SNOWMOW, you would first need to delete the MONITOR authorization by clicking on the delete button (trashcan icon).

Service	Authorization ID	Start Date	End Date	Authorization Amount	Paid Dollars	Invoiced Dollars	Swept Dollars	Balance	Note	Status	Actions
MONITOR: Emergency monitoring	AUL0000026	10/1/2013	10/31/2013	\$120.00	\$0.00	\$0.00	\$0.00	\$120.00		Approved	  

- Click “OK” to delete the line.

Service	Authorization ID	Start Date	End Date	Authorization Amount	Paid Dollars	Invoiced Dollars	Swept Dollars	Balance	Note	Status	Actions
MONITOR: Emergency monitoring	AUL0000026	10/1/2013	10/31/2013	\$120.00	\$0.00	\$0.00	\$0.00	\$120.00		Approved	  
TRANSPORT: Transportation service	AUL0000024									Approved	  
BACKGROUND: Background Checks	AUL0000022									Approved	  
PAS: Personal Assistant Services	AUL0000017								Notes Here.	Approved	  
Total:											

The page at <https://fmsdev.publicpartnerships.com> says:

Are you sure you want to delete this line?

- You will then need to go through the steps above to create an authorization for SNOWMOW. **NOTE:** The authorization will be in “Submitted” status and will need to be approved by your Service Coordinator before it can be used to pay timesheets and invoices.

Service	Authorization ID	Start Date	End Date	Authorization Amount	Paid Dollars	Invoiced Dollars	Swept Dollars	Balance	Note	Status	Actions
SNOWMOW: Snow removal or mowing Service	AUL0000035	10/1/2013	10/31/2013	\$120.00	\$0.00	\$0.00	\$0.00	\$120.00		Submitted	  
TRANSPORT: Transportation service	AUL0000024	10/1/2013	10/31/2013	\$150.00	\$0.00	\$0.00	\$0.00	\$150.00		Approved	  
BACKGROUND: Background Checks	AUL0000022	10/1/2013	10/31/2013	\$30.00	\$0.00	\$0.00	\$0.00	\$30.00		Approved	  
PAS: Personal Assistant Services	AUL0000017	10/1/2013	10/31/2013	\$2,700.00	\$0.00	\$0.00	\$0.00	\$2,700.00	Notes Here.	Approved	  
Total:				\$3,000.00	\$0.00	\$0.00	\$0.00	\$3,000.00			

- If you enter the incorrect date of service, authorization amount, or note, you will be allowed to edit these fields.
 - To edit these fields, click on the edit button (pencil icon)











- The fields will now become editable. In our example, we are going to edit the TRANSPORT authorization to \$100.

TRANSPORT: Transportation service	AUL0000024	10/1/2013	10/31/2013	100	\$0.00	\$0.00	\$0.00			Approved	 
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- After you make your edits, you can click the green checkmark to submit your changes.



- **NOTE:** If you edit an authorization that has already been approved, it will go back to submitted status. Submitted authorizations need to be approved by your Service Coordinator. Additionally, you can only edit dates of service for that specific month. If you try to go outside of the month, you will receive an error message.

Service	Authorization ID	Start Date	End Date	Authorization Amount	Paid Dollars	Invoiced Dollars	Swept Dollars	Balance	Note	Status	Actions
SNOWMOW: Snow removal or mowing Service	AUL0000035	10/1/2013	10/31/2013								 
TRANSPORT: Transportation service	AUL0000024	10/1/2013	11/30/2013								 
BACKGROUND: Background Checks	AUL0000022	10/1/2013	10/31/2013								 
PAS: Personal Assistant Services	AUL0000017	10/1/2013	10/31/2013								 
Total:				\$2,950.00	\$0.00	\$0.00	\$0.00	\$2,950.00			

The page at <https://fmsdev.publicpartnerships.com> says:

The date range you have selected goes beyond the range for this budget.

OK

Thank you for participating in the training and for using this guide to successfully create service authorizations for your WORK participants! If you have any questions, please contact us a 1-833-549-5673 or at pplksaetna@pcgus.com.