Eligibility Verification and TARS Submissions

Part 1: Eligibility Verification

The process of submitting a Treatment Authorization Request (TAR) starts with verifying eligibility in the Partnership Health Plan Online Services Portal.

Information needed before starting

- Full Legal Name of Client
- Date Of Birth

Steps to Verify Eligibility

1. Navigate to the Partnership Healthplan of California Online Services Portal located here: https://provider.partnershiphp.org/UI/Login.aspx and log in

2. Choose Eligibilty Module:
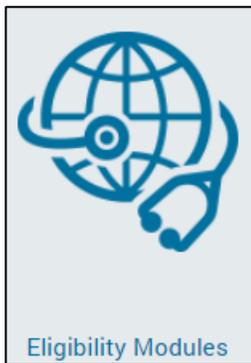
3. Next choose eEligibility

4. Enter the following information in the portal:

> **Date of Service:** Date that the service begins (or if processing retroactively, enter the date the service began
>
> **Last Name:** Client's legal last name
>
> **First Name:** Client's legal first name
>
> **Date of Birth:** Client's date of birth

Then select **Search Member**

5. A list of potential matches will populate, select the client with data that matches our records

6. The Member's Partnership records will be displayed on the screen. Look in the Eligibility Details Section below the Member's Demographics to see if the client is eligible to receive services

At the bottom section of the screen you can see if there is an expiration date of client's coverage coming up as well as details about which county they receive services from

7. If the member **is not eligible**, stop here and document in the client's case notes that they are not eligible for CalAIM services.

   If the member **is eligible**, the next step is to submit a Treatment Authorization Request (TAR)

Part 2: Treatment Authorization Request (TARS) Process

Now that it has been verified that the client is eligible for services, the TAR Submission process can take place.

Required documents for submitting TARS for each CalAIM program:

Community Supports- Recuperative Care

- CS Referral Form- document medical necessity for services in the additional notes section such as homeless and need to recuperate in a clean environment to reduce risk of complications from healing after hospitalization- state reason for hospitalization, procedures, medical diagnoses etc to support stay.

Community Supports- Housing Navigation/Transition Services

- CS Referral Form- document client's homeless status and health issues that would better be addressed if housed.

Community Supports- Housing Deposits

- CS Referral Form- be sure to note an itemized list of the cost what is requested and the total
- Supporting documents such as a lease agreement, past due utilities, letter from utility provider, etc.

Community Supports- Housing Sustaining/Tenancy

Note: An active TAR for Housing Navigation/Transition Services must be in place <u>before</u> submitting a Housing Deposits TAR

- CS Referral Form- document client's challenges with maintaining housing in additional notes section

Enhanced Care Management

- ECM Referral Form
- Individual Care Plan
- Signed ROI

Starting a TAR in the Partnership Online Services Portal

1. Verify that the member is eligible for services through the eEligibility process documented in Part One.
2. While still on the eEligibility screen, begin entering a Treatment Authorization Request (TAR) for the client by selecting <u>Enter a new eTAR – Outpatient</u> on the bottom right of the screen.

Tips for Completing a TAR

Member Details

Patient Ph#
Update the client's phone number if the one in their records isn't current.

TAR Start and End Dates

The **Start Date** will automatically be prepopulated with the Eligibility date that was entered on the prior screen. If that date is not correct, then return to the beginning of the eligibility module and enter the first date of service.

The **End Date** should be 180 days (90 for RC) after the Start Date- unless a retroactive TAR is being submitted. In that case, enter the exact days that the client was in the program.

Select Provider

Choose the first provider at the top of the drop down selection as shown in the screenshot. COTS information should automatically populate after making a selection.

TAR Type

Choose Community Supports or ECM from the dropdown list according to the service that is being requested for the client.

Patient Current Location

Choose Homeless if the client is living on the streets or in a shelter

Choose Home if the client is currently housed but is at risk of losing housing and needs new housing.

Is Urgent?

Choose this if the client needs Housing Deposit assistance within the next business day, or as soon as possible so that the client can take advantage of a housing opportunity. Describe why there is a sense of urgency to processing the TAR in the "Reason for the Urgent TAR" field.

Diagnosis Details and Medical Justification

Primary Diagnosis: Choose from the following:

> **Z5901-** Sheltered Homeless
> **Z5902-** Unsheltered Homeless
> **Z59811-** Housing instability, housed, with the risk of homelessness
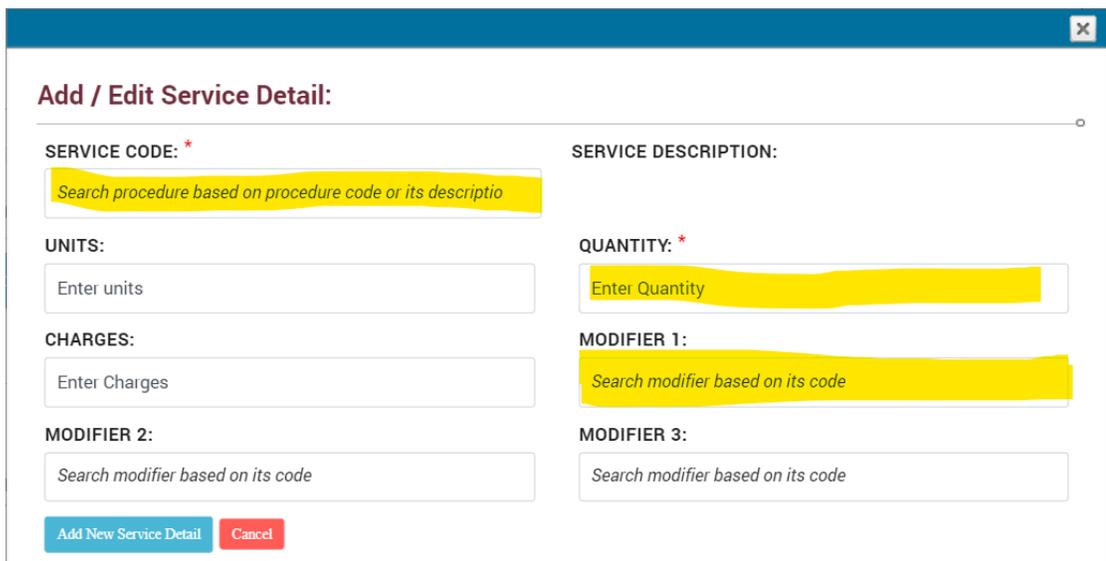
Secondary Diagnosis
Not required

Medical Justification

Document medical necessity for services such as homeless and need to recuperate in a clean environment to reduce risk of complications from healing after hospitalization- state reason for hospitalization, procedures, medical diagnoses etc. to support stay.

Service Details & Additional Notes

Choose [Add New Service Code] and complete the highlighted fields of the Add/Edit Service Detail form that pops up:

Add / Edit Service Detail:

SERVICE CODE: *
Search procedure based on procedure code or its descriptio

SERVICE DESCRIPTION:

UNITS:
Enter units

QUANTITY: *
Enter Quantity

CHARGES:
Enter Charges

MODIFIER 1:
Search modifier based on its code

MODIFIER 2:
Search modifier based on its code

MODIFIER 3:
Search modifier based on its code

[Add New Service Detail] [Cancel]

Service Codes

Please refer to the chart below when entering Service Codes, Quantities and Modifiers

Service	Code	Quantity	Modifier
Recuperative Care	T2033	90 (Days)	U6
Housing Transition / Navigation Services	H0043	6 (Months)	U6
Housing Deposits	H0044	1 time only	U2
Housing Tenancy and Sustaining Services	T2041	6 (Months)	U6
Enhanced Care Management Services	G9012	6 (Months)	U2
ECM Successful Outreach	G9012	1	--

Additional Notes

Give details about client's circumstances related to their medical condition that could be improved by the services being requested.

Attachments

Located in the top right corner of the form, choose the **Attachments: 0** button then choose the appropriate files to upload

Double Checking the TAR before submitting may save time in getting it processed. TAR errors need to be corrected and keeps the client waiting for services longer.

Before Submitting the TAR:

- Are the Start and End dates correct?
- Does the date range span 6 months for ECM or CSHN? 90 days/3 months or less for Recuperative Care?
- For ECM: Are both Enhanced Case Management and ECM Successful Outreach services requested?
- Does the quantity match the date range?
- Are the appropriate documents attached?
- Are there additional notes that could be added to the TAR to explain the client's needs?

After reviewing the TAR and making any necessary updates, submit it by pressing the **Submit eTAR** button located in the upper right corner of the screen.

After submitting the TAR, email the Program Manager, Data Manager and CalAIM Admin to let them know that a TAR has been submitted for the client.

Questions? Please reach out to the CalAIM Administrator

Part 3: Checking the Status of Submitted TARS

Once a TAR has been submitted, it typically will not show up in the system until the next day.

1. Log in to the Partnership Online Services Portal and then choose eTar Status Checking
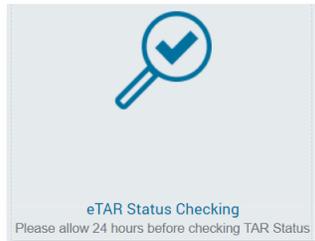

2. In the TAR Search Criteria form choose **Out Patient** from the drop-down list and press **Search**

3. TAR Search Results will populate with all active TARS within the past year. Find the line with the TAR that was submitted and look in the 3rd column for the latest status.

TAR Search Results

TAR #	Start & End Dates	TAR Status	Member Name	Service Provider Details	Submitted By	Attachments	Letters	View
PF2212040012	05/25/2022 - 07/06/2022	In Progress	CIN:	THE SHELTERLES COMMITTEE ON 900 HOPPER STREET PETALUMA , CA 94952 **Phone:** (707) 765-6530	COTSJGaines	*View Attachments*		*View TAR*
PF2212040011	04/21/2022 - 06/22/2022	In Progress	CIN:	THE SHELTERLES COMMITTEE ON 900 HOPPER STREET PETALUMA , CA 94952 **Phone:** (707) 765-6530	COTSJGaines	*View Attachments*		*View TAR*
PF2212040010	03/18/2022 - 03/21/2022	In Progress	CIN:	THE SHELTERLES COMMITTEE ON 900 HOPPER STREET PETALUMA , CA 94952 **Phone:** (707) 765-6530	COTSJGaines	*View Attachments*		*View TAR*
PF2211270003	11/27/2022 - 01/27/2023	Denied [Duplicate Authorization]	CIN:	THE SHELTERLES COMMITTEE ON 900 HOPPER STREET PETALUMA , CA 94952 **Phone:** (707) 765-6530	SWisemanCOTS	*View Attachments*		*View TAR*
PF2211300012	12/01/2022 - 02/28/2023	Approved	CIN:	THE SHELTERLES COMMITTEE ON 900 HOPPER STREET PETALUMA , CA 94952 **Phone:** (707) 765-6530	COTSEMorris	*View Attachments*	*View Letters*	*View TAR*

4. On this screen, the TAR and it's attachments can also be viewed. If the TAR has been **Approved**, choose View TAR and download a PDF of the file.
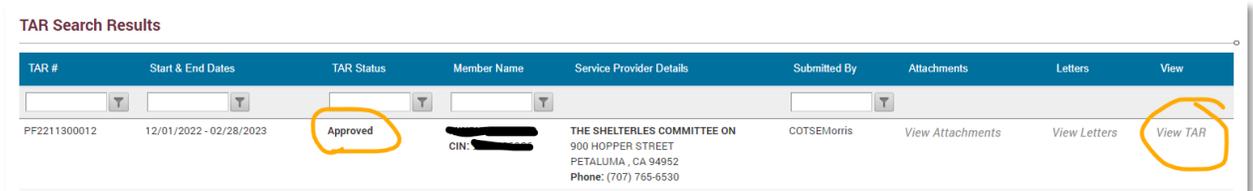
- Save in the **Approved TARs** folder located in the CalAIM folder on the S Drive. Be sure to follow the naming convention already in use there.
- Email the Program Manager and CalAIM Admin to let them know that the client's TAR has been approved

5. If the TAR has been **Denied**, please download the TAR to view the explanation, and reach out to the CalAIM Administrator for assistance with correcting the TAR and resubmitting it.

Best Practices for TAR Submissions

TAR Start Date

Please refer to the CalAIM program below to determine what Start Date should be used

CS Housing Navigation	Date should match the date the Housing Support Plan (HSP) was developed
CS Housing Deposit	Date should occur within the span of the CS Housing Navigation TAR, and cover 2 months, in case the move-in date gets pushed out
CS Tenancy/Sustaining	Date should occur after the client has moved in. If client received Housing Navigation services, then use the date the HSP was updated after move in.
CS Recuperative Care	Date should be the day they enroll in RC
Enhanced Care Mgmt	Date should match the date the ICP and ROI were signed

TAR Renewals

- Submit TAR renewals as soon as the current TAR ends to ensure continuity of service.
- Renewal date should be the day after the prior TAR ends.

Questions? Please reach out to the CalAIM Administrator