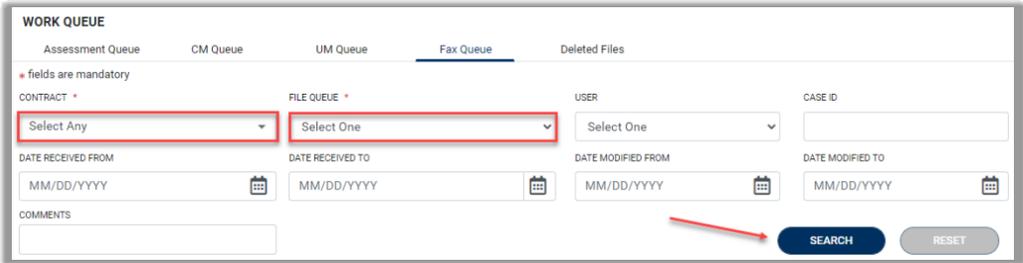


Job Aid Title: Creating a New UM Case	Job Aid Number: AC.ANG.JA.008
Date Published: 4/5/2024	Approved by: Daniyel Bezaury
References: Atrezzo Next Generation (ANG) User Manual	
Purpose: The purpose of this job aid is to provide step-by-step instructions to create a new UM case in ANG using either the Fax Queue or Consumer Search.	

Contents

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Populate Fax Queue

<p>Click on Fax Queue</p>	
<p>Select appropriate Contract and the appropriate File Queue</p> <p>Click Search</p>	



The selected queue will populate.

Open the document to find consumer's name

FAX QUEUE							
SELECT	FLAG	FILE NAME	RECEIVED ON	ENTER COMMENTS	FILE SIZE	MODIFIED ON	MODIFIED BY
<input type="checkbox"/>		Test_Copy_Copy_Copy.tiff	3/7/2022 11:04:17 AM	<input type="text" value="Copy"/>	34.01 KB	3/7/2022 11:04:17 AM	dbezaury
<input type="checkbox"/>		Test_Copy_Copy_Copy.tiff	3/7/2022 11:04:15 AM	Copy	34.01 KB	3/7/2022 11:04:15 AM	dbezaury
<input type="checkbox"/>		Test_Copy_Copy_Copy.tiff	3/7/2022 11:04:14 AM	Copy	34.01 KB	3/7/2022 11:04:14 AM	dbezaury

Hover over document row and click the **Associate/Create Case** icon

FAX QUEUE							
SELECT	FLAG	FILE NAME	RECEIVED ON	ENTER COMMENTS	FILE SIZE	MODIFIED ON	MODIFIED BY
<input type="checkbox"/>		Test_Copy_Copy_Copy.tiff	3/7/2022 11:04:17 AM	<input type="text" value="Copy"/>	34.01 KB	3/7/2022 11:04:17 AM	dbezaury

Create a Case from Fax Queue

Select **UM** in **Case Type** dropdown

CREATE CASE / SELECT CASE TYPE

NEW CASE REQUEST EXPAND ALL ▾

Case Type ▾

CASE TYPE *

▾

Case Parameters ▾

Consumer Information ▾

Provider Information ▾

CREATE CASE >

Select the appropriate **Case Contract** and **Request Type**

Case Parameters ▾

CASE CONTRACT *

▾

REQUEST TYPE *

▾

Enter at least one search field to locate your consumer

Click **Search**

Consumer Information ▾

SEARCH CONSUMER

FIRST NAME LAST NAME DATE OF BIRTH SSN (XXX-XX-XXXX)

CONTRACT MEMBER ID SUBSCRIBER ID/ MEDICAID ID EXCLUDE DECEASED MEMBERS

SEARCH

NEXT >



Select the radio button next to the consumer's name.

SELECT CONSUMER	FIRST NAME	LAST NAME	DATE OF BIRTH	CONTRACT CONSUMER ID	CONTRACT NAME	STATE	CREATED BY
<input checked="" type="radio"/>	Aisha				The Funds 92	TN	File

Note: If you select the wrong consumer, you can click **Change Consumer** to select another.

Consumer Information

CONSUMER NAME	DATE OF BIRTH	CONSUMER MEMBER ID	STATE	COUNTRY
Aisha			TN	US

[CHANGE CONSUMER](#)

Select **Provider Type** and enter at least one other search field.

Click **Search**

Provider Information

SEARCH PROVIDER

PROVIDER TYPE * Select One FIRST NAME LAST NAME NPI COUNTRY

SEARCH PREVIOUS

CREATE CASE

Select the radio button next to the provider's name.

SELECT PROVIDER	FIRST NAME	LAST NAME	NPI	MEDICAID ID	ADDRESS	CITY	STATE	COUNTRY
<input checked="" type="radio"/>	Temporary UMWA	Provider	999999999	DM3949192	123 Temporary Road	Temp City	WV	United States

Displaying records 1 to 1 of 1 records

[PREVIOUS](#)

Enter **FAX** number.

Provider Information Temporary UMWA Provider / 8469154 / 9999999999 / WV

Provider ID / NPI	Address	COUNTY	PHONE	FAX *
8469154 / 9999999999	123 Temporary Road, Temp City, WV US 99999		(999) 999-9999	

Click **Create Case** once all information is entered and all sections have green checks marking them as complete

NEW CASE REQUEST [EXPAND ALL](#)

- ✔ Case Type UM
- ✔ Case Parameters ^
- ✔ Consumer Information ^
- ✔ Provider Information Temporary UMWA Provider / 8469154 / 9999999999 / WV

CREATE CASE



Select appropriate **Document Type** in pop up window.

Click **Yes**

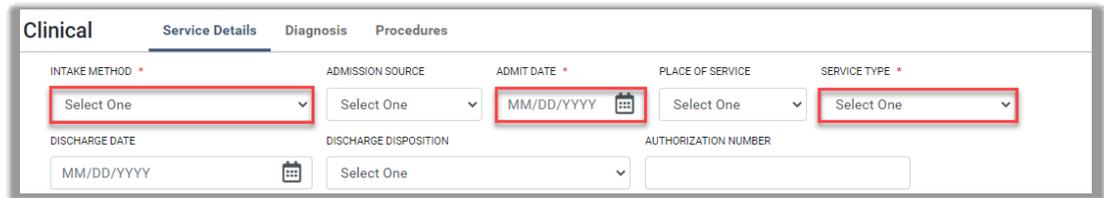


Enter Clinical Data and Submit Case

Once a case has been created, it will default to an unsubmitted status and require information in the **Clinical** sections: **Service Details**, **Diagnosis**, and **Procedures**



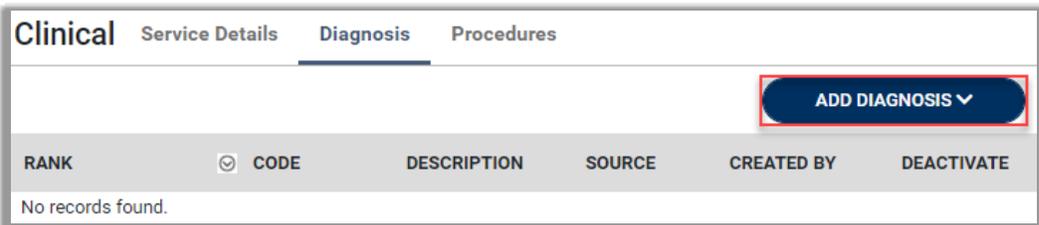
The case will default to Service Details. Select **Intake Method**, **Admit Date**, and **Service Type** from drop downs



Click **Diagnosis**



Click **Add Diagnosis**





Code Type will default to ICD10. Enter at least one other search field.

Click **Search**

Select the check box next to the appropriate code

SELECT	CODE TYPE	CODE	DESCRIPTION
<input type="checkbox"/>	ICD10	S32.89XA	FX OTH PARTS PELVIS INITIAL CLOS FX

Continue this process until all Diagnosis codes have been added.

Each selected diagnosis will be listed in **Selected Records**

SELECT	CODE TYPE	CODE	DESCRIPTION
<input checked="" type="checkbox"/>	ICD10	R26.0	ATAXIC GAIT

Displaying records 1 to 1 of 1 records

SELECTED RECORDS	CODE TYPE	CODE	DESCRIPTION
<input checked="" type="checkbox"/>	ICD10	R26.0	ATAXIC GAIT
<input checked="" type="checkbox"/>	ICD10	S32.89XA	FX OTH PARTS PELVIS INITIAL CLOS FX

Displaying records 1 to 2 of 2 records

Once all codes have been added click **Add Diagnosis**

SELECTED RECORDS	CODE TYPE	CODE	DESCRIPTION
<input checked="" type="checkbox"/>	ICD10	R26.0	ATAXIC GAIT
<input checked="" type="checkbox"/>	ICD10	S32.89XA	FX OTH PARTS PELVIS INITIAL CLOS FX

Displaying records 1 to 2 of 2 records

CANCEL **ADD DIAGNOSIS**

Note: Click and drag to set appropriate primary diagnosis. Select the deactivate button to delete

RANK	CODE	DESCRIPTION	SOURCE	CREATED BY	DEACTIVATE
1	R26.0	ATAXIC GAIT	Manual	ahadlock	<input type="checkbox"/>
2	S32.89XA	FX OTH PARTS PELVIS INITIAL CLOS FX	Manual	ahadlock	<input type="checkbox"/>



Click **Procedures**

The page defaults to **Request Info**

Select appropriate **Request Type** and confirm **Notification Date** and **Notification Time**

Click **Add Procedure**

Select **Code Type** and enter at least one other search field.

Click **Search**

Select the check box next to the appropriate code.

Complete these steps until all procedure codes are added.

SELECT	CODE TYPE	CODE	DESCRIPTION
<input type="checkbox"/>	CPT	E0260	Hosp bed semi-electr w/ matt

Each selected procedure will be listed in **Selected Records**

SELECT	CODE TYPE	CODE	DESCRIPTION
<input checked="" type="checkbox"/>	CPT	E0260	Hosp bed semi-electr w/ matt



Once all procedure codes have been added, click **Add Procedures**

SELECTED RECORDS

SELECT	CODE TYPE	CODE	DESCRIPTION
<input checked="" type="checkbox"/>	CPT	E0260	Hosp bed semi-electr w/ matt

Displaying records 1 to 1 of 1 records Previous **1** Next Show 10 Entries

ADD PROCEDURES

All added procedures populate under the request.

Click on a procedure code to complete detailed information

Clinical

Request 01
Un-Submitted 2/0

LOS Un-Submitted
N/A - N/A

E0260 Un-Submitted
N/A - N/A 0 / 0

Add Procedure

Select appropriate **Requested Start Date, Requested End Date, Requested Duration, and Requested Quantity**

Clinical Service Details Diagnosis Procedures

Request 01
Un-Submitted 2/0

LOS Un-Submitted
N/A - N/A

E0260 Un-Submitted
N/A - N/A 0 / 0

Add Procedure

E0260 Hosp bed semi-electr w/ matt

UNIT QUALIFIER
Select One

REQUESTED START DATE * REQUESTED END DATE * REQUESTED DURATION * REQUESTED QUANTITY *

MM/DD/YYYY MM/DD/YYYY

REQUESTED FREQUENCY REQUESTED RATE DISCOUNTED RATE STANDARD RATE

Select One \$ \$ \$

Note: The **Requested Duration** will change the end date based on input

REQUESTED START DATE * REQUESTED END DATE * REQUESTED DURATION *

REQUESTED FREQUENCY REQUESTED RATE DISCOUNTED RATE

Select One \$ \$



Note: Start and end dates populate under procedure once added

Repeat these steps for all procedure codes.

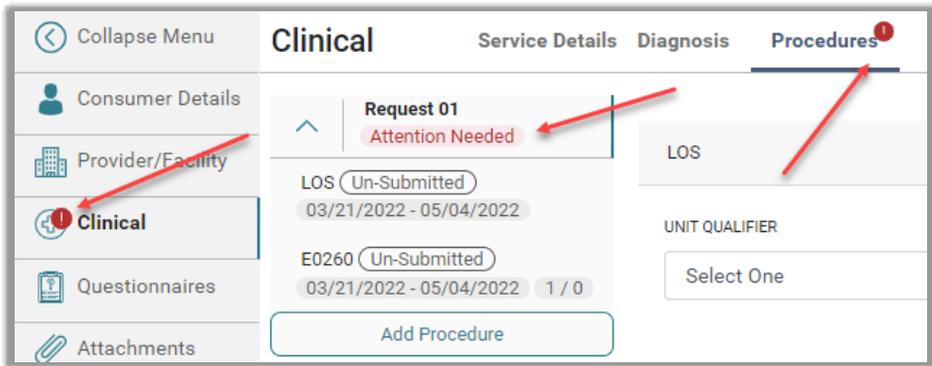
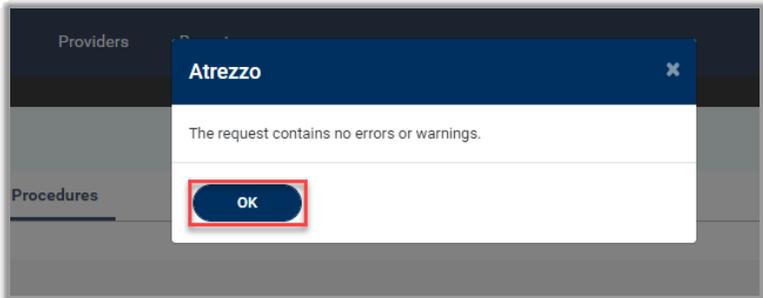
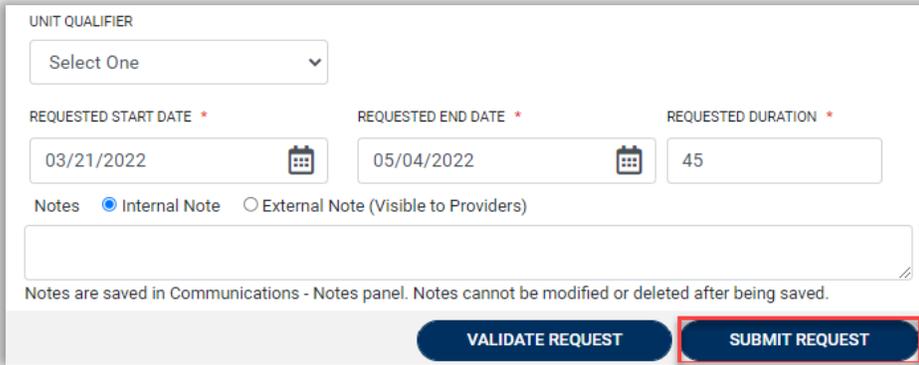
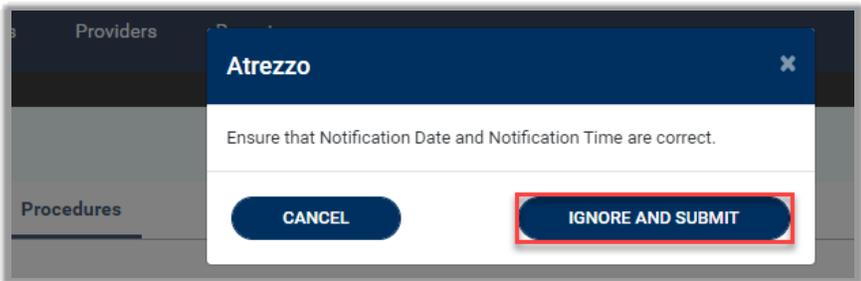
Click on **Validate Request** to confirm all required fields are complete

Review pop up window missing information.

All missing information listed in the warning message will also be marked by a warning icon.

Add any missing information and



<p>validate request again.</p>	
<p>Click OK once you receive a message that states, “The Request contains no errors or warnings.”</p>	
<p>Click Submit Request</p>	
<p>Review reminder. If Notification Date and Time are correct, click Ignore and Submit.</p> <p>If they are not correct, click Cancel to make correction and resubmit</p>	



The case is now **submitted**.

Reference **Case ID** and submitted status.

Consumer Search

Click **Consumers**

Select appropriate **Contract** and enter at least one other demographics field.

Click **Search**

Click on the consumer's name – blue hyperlink

FIRST NAME	LAST NAME	DATE OF BIRTH	CONTRACT CONSUMER ID	CONTRACT NAME	STATE	CREATED BY
Aisha				The Funds 92	TN	File

Displaying records 1 to 1 of 1 records

Review consumer details



Create Case from Consumer Profile

On consumer's page, click **Create Case**

CONSUMER / Aisha

CONSUMER NAME	GENDER	DATE OF BIRTH	CONSUMER ID	LOCATION	CONSUMER CONTRACT
Aisha					The Funds 92

[Consumer Summary](#)
[Consumer Timeline](#)

CREATE CASE >

Select UM in **Case Type** dropdown

CREATE CASE / SELECT CASE TYPE

NEW CASE REQUEST **EXPAND ALL** ▾

Case Type ▾

CASE TYPE *

Select One ▾

Case Parameters ▾

Consumer Information Aisha ▾

Provider Information ▾

CREATE CASE >

The **Case Contract** will autofill based on consumer selected.

Select appropriate **Request Type**

Case Parameters ▾

CASE CONTRACT * The Funds 92 ▾

REQUEST TYPE * Select One ▾

Confirm **Consumer Information** is correct.

NOTE: If the consumer is incorrect, you can click **Change Consumer** to select another.

Consumer Information ▾

CONSUMER NAME	DATE OF BIRTH	CONSUMER MEMBER ID	STATE	COUNTRY
Aisha			TN	US

CHANGE CONSUMER ▾

Select **Provider Type** and enter at least one other search field.

Click **Search**

Provider Information ▾

SEARCH PROVIDER

PROVIDER TYPE * 1 Select One ▾

FIRST NAME LAST NAME NPI COUNTRY Select One ▾

MORE FILTERS ▾ **SEARCH** 2

PREVIOUS <

CREATE CASE >



Select the radio button next to the provider's name.

SELECT PROVIDER	FIRST NAME	LAST NAME	NPI	MEDICAID ID	ADDRESS	CITY	STATE	COUNTRY
<input checked="" type="radio"/>	Temporary UMWA	Provider	9999999999	DM3949192	123 Temporary Road	Temp City	WV	United States

Displaying records 1 to 1 of 1 records

Previous 1 Next Show 10 Entries

PREVIOUS

Enter **FAX** Number

Provider Information					Temporary UMWA Provider / 8469154 / 9999999999 / WV
Provider ID / NPI	Address	COUNTY	PHONE	FAX *	
8469154 / 9999999999	123 Temporary Road, Temp City, WV US 99999		(999) 999-9999	<input type="text"/>	<input checked="" type="checkbox"/>

Click **Create Case** once all information is entered and all sections have green checks marking them complete

NEW CASE REQUEST

EXPAND ALL

- Case Type UM
- Case Parameters
- Consumer Information
- Provider Information Temporary UMWA Provider / 8469154 / 9999999999 / WV

CREATE CASE

Continue to [Enter Clinical Data and Submit Case](#) sections for remaining steps.



Version	Comments	Update by	Date Updated
1	Job Aid created	DBezaury	10/16/2020
2	Job Aid Updated	DBezaury	5/3/2022
3	Job Aid Updated	AHadlock	3/23/2023
4	Job Aid Updated	JMulbah	3/19/2024