SANDIS Manual AARP (Automated Authorization Reassignment Program)

The AARP program can be used to create new authorizations based on current authorizations when a vendor number, Service Code, or sub code needs to be changed. In the example below, these instructions demonstrate how to create new authorizations for a vendor that will provide Alternative Service.

> ➢ It is important to confirm that the new rate and service code have been added to the vendor file. The program will ask you to select the appropriate rate for these authorizations directly from the Rate Table.
> ➢ The program will create a file of records to bridge based on your selection of current authorizations. Once selected it will use the SANDIS POS Bridge Program to generate the new authorizations.
> ➢ Note that this program is available and will work for All regional centers.

Step 1: Select the Vendor and Clients
1. To begin the process, start at the menu MNPOSUPM

```
9/28/20                        MENU: MNPOSUPM
                            Manual Auth Creation


                3. Select Clients for AARP Based on Current Auths

                5. Run AARP Bridge/Create Auths

                7. Clear Work File from Last Run



            90. Sign Off




    F1=Help  F12=Previous Menu


Selection or Command
===> _
```

2. Select **Option 3**. Select Clients for the AARP Based on Current Auths.
   A screen will display where you'll enter the
   - **Vendor #**;
   - **Date** for Active Authorizations you want included;
   - **Service Code** (optional)
   - **SubCode** (optional).

   This allows you to select only the records that should be authorized or changed.

```
QPADEV00BW                      SANDIS - Vendor
RC033MN1                   Authorization ReAssignment


 Vendor....: HQ0067






     Select Authorizations active as of: 09012020


     Service Code: 510_   (Optional)
     SubCode:      01UN_   (Optional)




  F3=Exit
```

Note: For alternative services monthly flat rate, you will want to input both the service code and subcode so you only capture a specific set of authorizations to the relevant monthly flat rate.

3. **Press Enter,** you'll see a list previewing your record selection.

```
QPADEV00BW                      SANDIS - Vendor
RC033MN1                   Authorization ReAssignment

 Vendor...:  HQ0.        STEIN-KEARNY MESA CBP
 Number of Authorizations to be processed:   14   Cut-Off-Date: 09/01/2020
 Opt. 4=Delete from Processing             Selected
      Auth#    Consumer           Service Code: 510  SubCode: 01UN       Rate
 Opt Start Date End Date   Service-Subcode   G/L#                        Units

 _   21559311   6282211                              2021           70.8600
     07/01/2020 06/30/2021  510-01UN         0100004302000          23.0000
     DAY PROGRAM
 _   21451181   6292704                              2021           70.8600
     07/01/2020 06/30/2021  510-01UN         0100004302000          23.0000

 _   21167867   6214322                              2021           70.8600
     07/01/2020 06/30/2021  510-01UN         0100004302000          23.0000

 _   21613465   6241366                              2021           70.8600
     07/01/2020 06/30/2021  510-01UN         0100004302000          23.0000
     DAY PROGRAM 23 DAYS PER MONTH
                                                                    More...
              F3=Exit     F5=Print/Create/Update File
```

4. Review the list of Authorizations
   a. If there are clients that you do not want to process, you have the option to remove them from the list.
      i. Enter a **4** in front of any authorization on the list that you want to remove before processing.
   b. If the data is correct **press F5** to create the file of records that will be used to bridge and create the new authorizations. This will return you to the menu.

   Note: Placing the 4 in front of the authorization will trigger the authorization to be excluded when you select Option 5. The authorizations will not be removed from the list you are viewing if you enter on the screen.

Step 2: Process the client records that were selected and create the new authorizations.

5. From the menu, select option **#5 Run AARP Bridge/Create Authorizations**.
6. On the screen that appears, enter the criteria to be used for the new authorizations.
   a. Vendor #;
   b. Monthly Units:
   c. Service Dates.
   d. The Comment Lines are optional if you want to add additional information about these authorizations.

EXAMPLE:

```
QPADEV00BW              SANDIS - Purchase of Service
RC033M                  Request/Authorization Change

 # of Clients to process     14

Vendor#.?  HQ0067   Vendor Name:   STEIN-KEARNY MESA CBP

Service Code..:     SERVICE CODES            Subcode:

Monthly units: _____1.00

Service Dates:   From 11/01/2020  To _1/31/2021

Comments..:
   _____
   _____




F3=Exit   F5=Reset        F8=Create Bridge transactions
```

7. After you complete filling in the information, **Press ENTER**

This will take you to the Rate Table selection for this vendor.

8. Enter "1" in front of the correct rate that will be used for the new authorizations.
9. **Press Enter** to continue.

```
                    SANDIS - Purchase of Service
  RU033C            Request/Authorization Change

  Resource: HQOO    STEIN-KEARNY MESA

  Options: 1=Select

OptSrvc Sub          Description                      Cost      Typ
 1 510 01    AVG 5 D/W:  BILL ACTUAL DAYS                     70.860  M
          STEIN ADULT DEV CTR      Effective from: 05/01/2020 To 06/30/2021
```

```
  QPADEV0002          SANDIS - Purchase of Service
  RC033M              Request/Authorization Change

   # of Clients to process      14

  Vendor#.?  HQ0067  Vendor Name:  STEIN-KEARNY MESA CBP

  Service Code..: 510 ADULT DEVELOPMENT CT       Subcode: 01UN

  Monthly units: _____1.00

  Service Dates:   From 11/01/2020  To  1/30/2021

  Comments..:
  _____
  _____




  F3=Exit    F5=Reset      F8=Create Bridge transactions
```

10. Confirm that the Service Codes, # of Units, and Dates are correct.
11. **Press F8** to Create the Bridge Transactions. This will create the file of records to Bridge.
12. A Pop-Up window will display asking you to confirm the number of records that you will bridge.

```
  QPADEV00BW          SANDIS - Purchase of Service
  RC033M              Request/Authorization Change

   # of Clients to process     14

  Vendor#.?  HQ0067  Vendor Name:  STEIN-KEARNY MESA CBP

  Service Code..:     SERVICE CODES          Subcode:

  Monthly units: _____
                   _              AARP Bridge UPDATE Warning
  Service Dates:    From
                          You are about to Bridge AARP transactions
  Comments..:                   14          Will be bridged
  _____     With the above information
  _____
                               Press F5 to confirm Bridge
                               F3=Exit

  F3=Exit   F5=Reset       F8=Create Bridge transactions
```

13. **Press F5** to confirm your selection, which will take you to the POS Bridge Preview Screen.

Step 3: This is the SANDIS POS Bridge Screen and this is where you will run the Bridge to Create Authorizations.

```
                              SANDIS - Purchase of Services                              SDR400
RC033SEL   -2                   Preview of Services to Bridge                    9/28/20 22:43:27
                            Authorization Records Would be Created For:
Sorted by: Vendor
Selected By.......:      Caseload.: ALL And Service Code ALL And Consumer Last Name.: ALL        Or UCI#: ALL
Type option, press Enter.     And Vendor Name.: ALL                 Or Vendor#: ALL      And Beginning date.: ALL
 1=Select 5=Display Multiples 7=Hold
Opt Consumer   Name               Mgr Vendor Name            Service   Begin    End          Units       Rate      Monthl
 _  6282604                       SDK HQ0067 STEIN-KEARNY MESA CB 510 01'   20201101 20210130    1.00      70.86        70.86
 _  6290822                       SDM HQ0067 STEIN-KEARNY MESA CB 510 01    20201101 20210130    1.00      70.86        70.86
 _  6296613                       NAA HQ0067 STEIN-KEARNY MESA CB 510 01    20201101 20210130    1.00      70.86        70.86
 _  6213035                       SHA HQ0067 STEIN-KEARNY MESA CB 510 01.   20201101 20210130    1.00      70.86        70.86
 _  623981o                       PLK HQ0067 STEIN-KEARNY MESA CB 510 01    20201101 20210130    1.00      70.86        70.86
 _  6282211                       SHI HQ0067 STEIN-KEARNY MESA CB 510 01.   20201101 20210130    1.00      70.86        70.86
 _  6285301                       PIE HQ0067 STEIN-KEARNY MESA CB 510 01'   20201101 20210130    1.00      70.86        70.86
 _  6219224                       SHM HQ0067 STEIN-KEARNY MESA CB 510 01.   20201101 20210130    1.00      70.86        70.86
 _  6292704                       33A HQ0067 STEIN-KEARNY MESA CB 510 01    20201101 20210130    1.00      70.86        70.86
 _  6236046                       SHA HQ0067 STEIN-KEARNY MESA CB 510 01    20201101 20210130    1.00      70.86        70.86
 _  6214322                       SHA HQ0067 STEIN-KEARNY MESA CB 510 01    20201101 20210130    1.00      70.86        70.86
 _  6289525                       ~HA HQ0067 STEIN-KEARNY MESA CB 510 01    20201101 20210130    1.00      70.86        70.86
                                                                                                               More...
   F3=Exit        F5=Create Authorizations         F8=Print only, No Auths Created
```

Other options available if you do not want to create the authorizations are:
- **F8** to get a printed preview list without creating authorizations.
- **F3 to Exit** without making any changes.

14. **Select F5 to Create Authorizations**. (Note: this will produce two reports, check your printer or your spoolfile.)

```
        ENTER YOUR INITIALS - 2 CHARS   ENTER XX
        ENTER REQUIRED PARAMETER

   Enter Reply   _____
```

15. Enter your 2-character Initials and Enter to complete the Bridge process.

    Note: If you do not select the option "Create Authorizations" you can restart the process, but you will want to start over from Step 1 after you clear the previous work file using option #7 from the menu.

16. Complete process authorizations normally by navigating to UFS Menu PSME22 A/P Service Authorizations and run Option 2 Edit Authorizations using the 2 character initials completed in #15. Review the Edit and then complete the process with option 3 Post Authorizations.

Note: An important fact to remember is that these new Authorizations were selected from the vendors current UFS Authorizations. The AARP program can be used to create new authorizations whenever a change is made to a vendor record that will require creating new authorizations. It can be used for small groups or large groups of records to update.