



EIHub

First Steps Early Intervention
Case Management System



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Guide to Creating Evaluation and Assessment Authorizations

Creating an Evaluation/Assessment Authorization

1. Navigate to the “Assessment” tab
2. Select the “Evaluation Information” panel
3. Click “Add”

The screenshot displays a software interface for managing child and family outcomes. The top navigation bar includes tabs for 'Child at a Glance', 'Child Info', 'Family Info', 'Insurance Info', 'Assessment', 'Services', 'Transfer, Transition, Exit, Close and Re-Open', and 'Documents'. The 'Assessment' tab is selected, indicated by a blue arrow labeled 'Step 1'. Below the navigation bar, a sidebar on the left contains a list of panels: 'Evaluation Information', 'Child and Family History', 'Birth History', 'Autism Rating', 'COSF', and 'Level of Development'. The 'Evaluation Information' panel is selected, indicated by a blue arrow labeled 'Step 2'. The main content area shows a search bar, a table with columns for 'Request Received Date', 'EVAL Meeting Date', 'Service Type', 'Authorization Information', and 'Evaluator', and an 'Add' button. A blue arrow labeled 'Step 3' points to the 'Add' button. The table currently displays 'No data available in table' and 'Showing 0 to 0 of 0 entries'. There are 'Prev' and 'Next' buttons at the bottom right of the table area.

Creating an Evaluation/Assessment Authorization

Completing Evaluation/Assessment Information

The system will automatically open to the "Evaluation Information" panel

4. Select "State" as the "Pay Source"
5. Click the "binoculars" icon in the "Program" field
6. Select the most appropriate evaluation/assessment activity from the "Program" pop-up dropdown list
7. Click "Save"

The screenshot shows a web form with the following fields and callouts:

- *Pay Source:** A dropdown menu with "State" selected. A blue arrow labeled "Step 4" points to this field.
- *Program:** A dropdown menu with "Assessment/Evaluation" selected. A blue binoculars icon is to the right of the dropdown. A blue arrow labeled "Step 5" points to the binoculars icon.
- *Service Type:** A dropdown menu (partially visible).
- Select Program:** A pop-up window with a close button (X) in the top right corner. It contains:
 - Program:** A dropdown menu with "Assessment/Evaluation" selected. A blue arrow labeled "Step 6" points to this dropdown.
 - Buttons:** A blue "Save" button and a grey "Cancel" button. A blue arrow labeled "Step 7" points to the "Save" button.

Creating an Evaluation/Assessment Authorization

Completing Evaluation/Assessment Information

8. Select the type of service being authorized as the “Service Type” (e.g., Physical Therapy)
9. Select “Inactive” as the “Authorization Status”

*Pay Source

State

*Program

Assessment/Evaluation



*Service Type

Physical Therapy

Step 8

*Authorization Status

Inactive

Step 9

Creating an Evaluation/Assessment Authorization

Completing Evaluation/Assessment Information

10. Enter the start date of the activity as “Dates of Evaluation From”
11. Enter the end date of the activity as “Dates of Evaluation To”
12. Select the agency/independent provider that provided the service as “Agency”
13. Select the “Location Type” where the activity occurred
14. Click “Submit”



The screenshot shows a web form with four input fields and a submit button. Each field is annotated with a blue arrow pointing to it, labeled with a step number. The fields are: 'Dates of Evaluation From' (03/03/2021), 'Dates of Evaluation To' (03/03/2021), '*Agency' (Thrive Alliance), and 'Location Type' (Home). The 'Submit' button is at the bottom right.

Dates of Evaluation From	03/03/2021	Step 10
Dates of Evaluation To	03/03/2021	Step 11
*Agency	Thrive Alliance	Step 12
Location Type	Home	Step 13
		Step 14

Creating an Evaluation/Assessment Authorization

Automatic Generation of Authorization Number

Once "Submit" is clicked, the system will automatically generate the authorization number

*Pay Source
State

*Program
Assessment/Evaluation

*Service Type
Physical Therapy

*Authorization Status
Inactive

Authorization Number
A18392641956894

Dates of Evaluation From
03/03/2021

Dates of Evaluation To
03/03/2021

*Agency
ABC Agency

Location Type
Home

Submit



Creating an Evaluation/Assessment Authorization

Adding a Diagnosis Code to an Evaluation/Assessment

15. Navigate to the “ICD-10 Diagnoses for Evaluation” panel
16. Click “Add”

The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar has a menu with the following items: Evaluation Information, Meeting Schedule, ICD-10 Diagnoses for Evaluation (highlighted), Screening Results, Agency Assignment, and Evaluator Assignment. The main content area has a tab labeled 'Screening' and a search bar. Below the search bar is a table with two columns: 'ICD10 Code' and 'Diagnosis'. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'. A yellow 'Add' button is located to the right of the table. A blue arrow labeled 'Step 15' points to the 'ICD-10 Diagnoses for Evaluation' menu item, and another blue arrow labeled 'Step 16' points to the 'Add' button.

Creating an Evaluation/Assessment Authorization

Adding a Diagnosis Code to an Evaluation/Assessment

17. Select the most appropriate evaluation/assessment ICD10 code from the “ICD10” pop-up dropdown list

18. Click “Submit”

Add ICD10 Code

ICD10 Code

Q90

*ICD10 Code

Down syndrome

Submit

Step 17

Step 18

Creating an Evaluation/Assessment Authorization

Assigning Providers to an Evaluation/Assessment

19. Navigate to the “Evaluator Assignment” panel
20. Click the “binoculars” icon in the “Primary Evaluator” field

Evaluation | Screening

Evaluation Information

Meeting Schedule

ICD-10 Diagnoses for Evaluation

Screening Results

Agency Assignment

Evaluator Assignment ← Step 19

Primary Evaluator

PrimaryTherapistName → Step 20

Secondary Evaluator

SecondaryTherapistName

Authorization Number

A18392521956877

Submit

Creating an Evaluation/Assessment Authorization

Assigning Providers to an Evaluation/Assessment

21. Select the appropriate provider's name in the "Therapist" field from the "Primary Evaluator" pop-up
22. Click "Save"

Select Primary Evaluator

Therapist

Step 21

Step 22

Save Cancel

Creating an Evaluation/Assessment Authorization

Assigning Providers to an Evaluation/Assessment

23. If needed, click the “binoculars” icon in the “Secondary Evaluator” field

Evaluation | Screening

Evaluation Information
Meeting Schedule
ICD-10 Diagnoses for Evaluation
Screening Results
Agency Assignment
Evaluator Assignment

Primary Evaluator
PrimaryTherapistName

Secondary Evaluator
SecondaryTherapistName

Authorization Number
A18392521956877

Submit

Step 23

Creating an Evaluation/Assessment Authorization

Assigning Providers to an Evaluation/Assessment

24. Select the appropriate provider's name in the "Therapist" field from the "Secondary Evaluator" pop-up
25. Click "Save"

Select Secondary Evaluator

Therapist

Step 24

Step 25

Save Cancel

Creating an Evaluation/Assessment Authorization

Activating the Evaluation/Assessment Authorization

26. Navigate to the “Evaluation information” panel

27. Select “Active” as the “Authorization Status”

28. Click “Submit”

The screenshot shows a web application interface for creating an evaluation/assessment authorization. The interface is divided into two main sections: a left-hand navigation menu and a main form area. The navigation menu includes options like 'Meeting Schedule', 'ICD-10 Diagnoses for Evaluation', 'Screening Results', 'Agency Assignment', and 'Evaluator Assignment'. The 'Evaluation Information' panel is selected, highlighted with a blue arrow labeled 'Step 26'. The main form area contains several fields: 'State' (dropdown), '*Program' (text input), 'Assessment/Evaluation' (text input with a magnifying glass icon), '*Service Type' (dropdown), 'Physical Therapy' (dropdown), '*Authorization Status' (dropdown with 'Active' selected, highlighted with a blue arrow labeled 'Step 27'), 'Authorization Number' (text input with value 'A18392641956894'), 'Dates of Evaluation From' (text input with value '03/03/2021'), 'Dates of Evaluation To' (text input with value '03/03/2021'), '*Agency' (dropdown), 'Location Type' (text input with value 'Home'), and a 'Submit' button (highlighted with a blue arrow labeled 'Step 28').

Viewing the Authorized Evaluation/Assessment Activity

- 29. Navigate to the "Assessment" tab
- 30. View the newly authorized evaluation/assessment activity in the grid

The screenshot shows a software interface with a top navigation bar containing tabs: "Child at a Glance", "Child Info", "Family Info", "Insurance Info", "Assessment", "Services", "Transfer, Transition, Exit, Close and Re-Open", and "Child/Family Outcomes Tab". A blue arrow labeled "Step 29" points to the "Assessment" tab. On the left, a sidebar menu lists: "Evaluation Information", "Child and Family History", "Birth History", "Autism Rating", "COSF", and "Level of Development". A blue arrow labeled "Step 30" points to the "Evaluation Information" section. The main area features a search bar and a table with the following columns: "Request Received Date", "EVAL Meeting Date", "Service Type", "Authorization Information", "Evaluator", and "Evaluation Type". A single row of data is visible: "3/4/2021", an empty cell, "Physical Therapy", "A18392641956894", an empty cell, and "Assessment/Evaluation". To the right of the table are "Add", "Edit", and "Delete" buttons. Below the table, it says "Showing 1 to 1 of 1 entries" and includes "Prev", "1", and "Next" navigation buttons.

Request Received Date	EVAL Meeting Date	Service Type	Authorization Information	Evaluator	Evaluation Type	
3/4/2021		Physical Therapy	A18392641956894		Assessment/Evaluation	Add Edit Delete





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For assistance, contact
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