

Creating New UM Cases

Job Aid Title: Creating a New UM Case	Job Aid Number: ANGJA.008
Date Published: 10/16/2020	Approved by: Daniyel Bezaury, Director Atrezzo Implementation Training & Support
References: UM User Guide	
Purpose To identify the steps to create a new case for UM. Drop down options will vary based on contractual requirements and vary by assigned user role.	

Procedure :

Click CREATE CASE from the top navigation index.	
Select the appropriate CASE TYPE: UM . Search for a Consumer by selecting the contract and entering consumer information, then click SEARCH.	

Once the appropriate Consumer is selected, enter Provider Information including PROVIDER TYPE (Facility or Provider) and available information then click SEARCH.

NOTE: Contract will default based on selected Consumer

CASE TYPE *
 UM

Consumer Information

CONSUMER NAME	DATE OF BIRTH	SSN	CONSUMER MEMBER ID	CITY	STATE	COUNTRY	COUNTY

CHANGE CONSUMER

Provider Information

SEARCH PROVIDER

CONTRACT * PROVIDER TYPE * FIRST NAME LAST NAME NPI COUNTRY

A B Select One

MORE FILTERS SEARCH

PREVIOUS NEXT

Once the appropriate Provider is selected, enter Case Parameters, then click CREATE CASE.

NOTE: options will vary by contract.

Consumer Information

CONSUMER NAME	DATE OF BIRTH	SSN	CONSUMER MEMBER ID	CITY	STATE	COUNTRY	COUNTY

Case Parameters

CASE CONTRACT * REASON FOR REFERRAL * REFERRAL SOURCE * PROGRAM *

A B C D Select One

NOTE

GO BACK CREATE CASE E

NOTE: Until all required fields are completed, the Create Case button will remain inactive (grayed out). Once all required fields are completed, this button will activate and the case can be created.

Once the case has been created, the case page will display. The case will default to "Un-Submitted" until all required UM information is added to officially submit the request.

CONSUMER NAME	GENDER	DATE OF BIRTH	MEMBER ID	CONTRACT	
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	
UN-SUBMITTED	CASE ID	CATEGORY	CASE CONTRACT	CASE SUBMIT DATE	SRV AUTH
		Outpatient	Cerner		
UM-OUTPATIENT EXPAND ALL ▾					
Consumer Details				Location: [REDACTED]	▾
Provider/Facility			Request Servicing: [REDACTED]		▾
Clinical			Service Type: [REDACTED]	Notification Date : 09/21/2020	▾
			Request Type: [REDACTED]	Notification Time : 04:57 PM	
Questionnaires					▾
Attachments	Document-0			Letters- 0	▾
Communications	Most Recent Interaction date:			Most Recent Note date:	▾
← CANCEL REQUEST			VALIDATE REQUEST SUBMIT REQUEST		

Complete all required information based on contractual requirement and workflow. Some information will populate based on the case creation, including Consumer Details and provider/Facility.

Version	Comments	Update by	Date Updated
1	Job Aid created	DBezaury	10/16/2020