

Processing Parent Portal Tasks in the EBT CSAW Dashboard
Summary Handout

Processing New Authorization Requests:

1. Click on the *Task Description* link
 - ✓ Review request information
 - ✓ All sections must be reviewed

2. Review *Requested Parent Activity Schedule*
 - ✓ Check CWW for approved activities
 - ✓ Review/edit information
 - ✓ Accept

3. Enter Child Copay/Special Need

4. Review *Requested Authorizations*
 - ✓ Complete authorization assessment
 - ✓ Accept

5. Click **Process**.

6. Complete regular process to finish authorization:
 - ✓ Derive hours
 - ✓ Select provider price type
 - ✓ Change status to Completed

7. Calculate benefits.

If the CC AG Status is Pend:

1. Change task status to **Processed**.

2. Send parent a message. They must contact the agency or resubmit their request when eligibility is confirmed.

Processing Authorization Change Requests:

1. Click on the *Task Description* link
 - ✓ Review request information
 - ✓ All sections must be reviewed
- If the request is to end a current authorization or delete a future authorization without requesting a new authorization:
 2. **Delete** the parent's approved activity schedule
 3. Process the end authorization request
- If the request is for a new provider or a change in schedule at the current provider:
 2. Process the end authorization request
 3. Review the *Requested Parent Activity Schedule*
 - ✓ Check CWW for approved activities
 - ✓ Review/edit information
 - ✓ Accept
 4. Update Copay/Special Need if necessary.
 5. Review *Requested Authorizations*
 - ✓ Complete authorization assessment
 - ✓ Accept
 6. Click **Process**.
 7. Complete regular process to complete authorization:
 - ✓ Derive hours
 - ✓ Select provider price type
 - ✓ Change status to Completed
 8. Calculate benefits.
- If the request is to extend the current authorization, follow steps 3-8 above.

If any request information is incomplete or inaccurate:

1. Call the parent. State what is missing/inaccurate.
2. If the parent is not reachable at initial contact, the worker may send the parent a message in the Parent Portal. Include:
 - ✓ Request tracking number
 - ✓ What information is missing/inaccurate
 - ✓ How to contact the agency (the parent cannot reply to the message in the portal)
3. Change status to **In Progress**.
4. Enter a comment. Include:
 - ✓ What request information was accepted (if any)
 - ✓ What information is missing/inaccurate
 - ✓ How the parent was contacted