

Process for Active CMH Clients who need Respite Services

Purpose: Respite services are for all children with a SED diagnosis, regardless of CMH program status. These services are intended to support families with SED children through preventing the need for hospitalization or higher level of care.

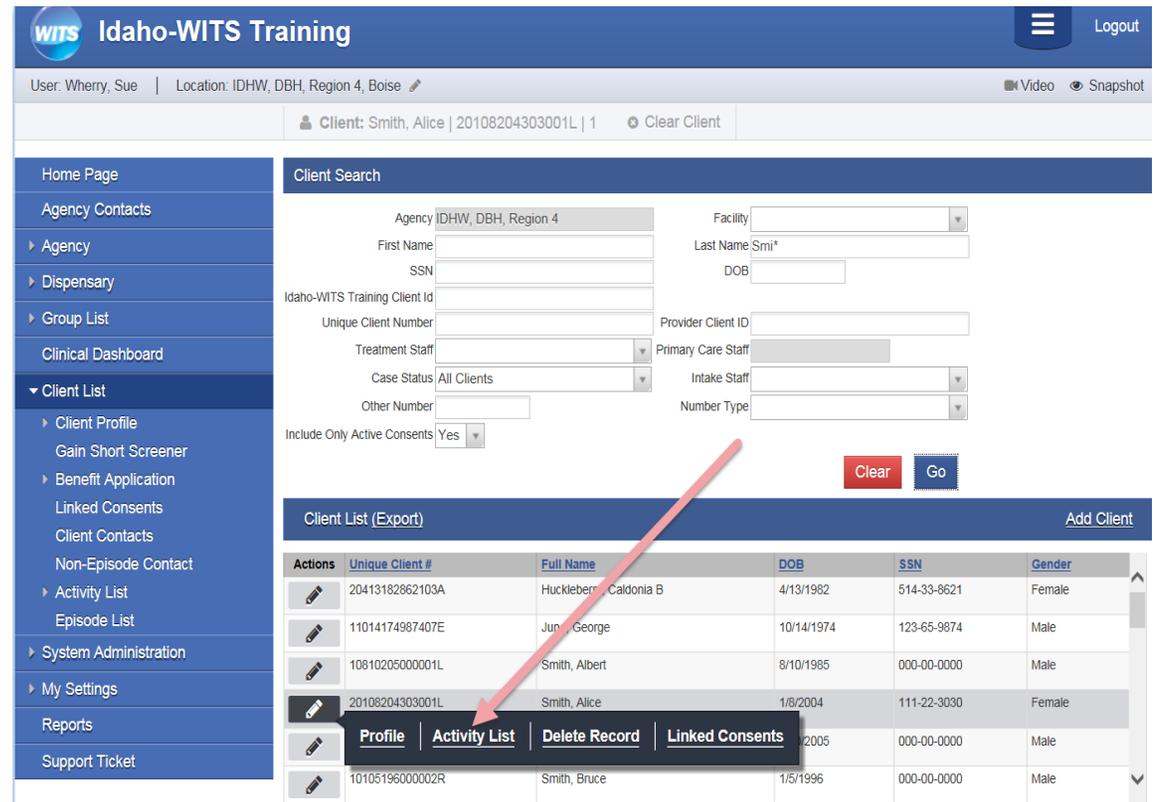
Clinicians will:

- Create the Respite Program Enrollment
- Create Non-Billable Encounter Note and document the child's SED status and justification for services.
- Create the Voucher and give the family the Voucher and Introduction Letter for IFF.
- Close Respite Program Enrollment when services are no longer needed.

Locate Client in the Client list

1. **Getting here:** Login, select the **Facility**, select **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen. **Search for an existing record by entering the first 3 letters of the last name followed by an ***. If the client already exists in WITS, proceed to step 5.

2. Hover over the  and click Activity List.



The screenshot displays the Idaho-WITS Training web application. The top navigation bar includes the WITS logo, the text "Idaho-WITS Training", and a "Logout" button. Below the navigation bar, the user's name "User: Wherry, Sue" and location "Location: IDHW, DBH, Region 4, Boise" are shown. A search bar indicates the current client: "Client: Smith, Alice | 20108204303001L | 1".

The main content area is divided into two sections. The top section is "Client Search", which contains various input fields for filtering results, including Agency (IDHW, DBH, Region 4), Facility, First Name, Last Name (Smi*), SSN, DOB, Idaho-WITS Training Client Id, Unique Client Number, Provider Client ID, Treatment Staff, Primary Care Staff, Case Status (All Clients), Intake Staff, Other Number, and Number Type. There is also a checkbox for "Include Only Active Consents" (Yes) and "Clear" and "Go" buttons.

The bottom section is "Client List (Export)", which displays a table of client records. A red arrow points to the "Activity List" button in the actions column for the client with Unique Client # 20108204303001L.

Actions	Unique Client #	Full Name	DOB	SSN	Gender	
	20413182862103A	Huckleberry, Caidonia B	4/13/1982	514-33-8621	Female	
	11014174987407E	Jun, George	10/14/1974	123-65-9874	Male	
	10810205000001L	Smith, Albert	8/10/1985	000-00-0000	Male	
	20108204303001L	Smith, Alice	1/8/2004	111-22-3030	Female	
				2005	000-00-0000	Male
	10105196000002R	Smith, Bruce	1/5/1996	000-00-0000	Male	

Create the Respite Program Enrollment

NOTES:

- Active CMH Clients may have an open Program Enrollment for Respite in addition to other Program Enrollments.

3. Click **Program Enroll** on the Navigation Pane.

4. Click **Add Enrollment** on the right side of the blue bar.

The screenshot shows a navigation pane on the left with a blue background. The 'Program Enroll' option at the bottom is highlighted with a red box and a red arrow pointing to it. To the right, the 'Client Activity List' section is visible, showing a table with columns for 'Actions' and 'Activity'. The 'Activity' column contains 'Client Information (Profile)' and 'Intake Transaction'.

The screenshot shows the 'Program Enrollment' form and list. The form includes fields for 'Program Name', 'Modality', 'Facility', 'From', and 'To'. Below the form is a table titled 'Program Enrollment List' with columns for 'Actions', 'Program Name', 'Start Date', 'End Date', 'Facility', and 'Notes'. A red arrow points to the 'Add Enrollment' button on the right side of the blue bar. The 'Clear' and 'Go' buttons are also visible.

User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise

Client: Smith, Alice | 20108204303001L | 1

Active Program Enrollments During Date Range 1/7/2015 - 1/7/2016

Actions	Program Name	Start Date	End Date	Facility	Notes

5. Select **Respite Care** as the Program Name.
Edit the Start Date as necessary.

6. Click **Finish**.

Client: Smith, Alice | 20108204303001L | 1 Clear Client

Program Enrollment Profile

Facility: Boise

Program Name: Respite Care

Program Staff: Wherry, Sue

Termination Reason:

Notes:

Days on Wait List: Start Date: 12/28/2015

End Date:

Cancel Save Finish



Create an Non-Billable Encounter Note

7. Click **Encounters** on the Navigation Pane.

Home Page
Agency Contacts
▶ Agency
▶ Dispensary
▶ Group List
Clinical Dashboard
▼ Client List
▶ Client Profile
Gain Short Screener
▶ Benefit Application
Linked Consents
Client Contacts
Non-Episode Contact
▼ Activity List
Intake
Client Eligibility
Fee Determination
Court Monitoring
▶ Drug Testing
Wait List
▶ Assessments
Diagnosis List
▶ Admission
Program Enroll
▶ ECourt
▶ Encounters

Client Activity List

Actions	Activity
	Client Informa
	Intake Transa
	Client Prograr
	Miscellaneous
	Client Eligibili

8. Click **Add New** on the right side of the blue bar.

Client: Smith, Alice | 20108204303001L | 1 Clear Client

No results match your search criteria.

Encounter Search

Start Date: 1/8/2015 End Date: 1/8/2016
Rendering Staff: [] Service: []
Encounter Status: [] Program: []
Allow Disclosure of Note: []

Clear Go

Encounter List (Export) Add Encounter

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Status

9. Complete all **yellow fields**.

Click on the 

Enter a note in the Unsigned Notes box documenting the child's SED status and justification for services

10. Click **Sign Note**.

NOTE: Selecting Sign Note will move the Unsigned Note to the Signed Notes box and will include the electronic signature of the person, and the date and time the note was signed. The Note is no longer editable.

Client: Smith, Alice | 20108204303001L | 1 Clear Client

Encounter

Note Type: Case Management Note
ENC ID: _____ Created Date: _____
Service: Respite Care
Parent Service: _____
Program Name: Boise/Respite Care : 12/28/2015 - 1/7/2016
Start Date: 12/29/2015 End Date: _____
Start Time: _____ End Time: _____
Duration: _____
Service Location: Office
Emergency: No
Homeless: No
Interactive: No
of Service Units/Sessions: 1
Client Attended: Yes
Pregnant: _____ Service Category: OP-Outpatient

Diagnoses for this Service

Primary: _____
Secondary: _____
Tertiary: _____

Rendering Staff: Wherry, Sue
Supervising Staff: _____
Referring Phys: _____

Administrative Actions

[Release to Billing](#)

Cancel Save Finish 

Encounter Notes

Goal Progress: _____

Add Goals Add Goals

Actions	Goal #	Goal	Description

Add Objectives Add Objectives

Actions	Obj.#	Objective	Description

Add Interventions Add Interventions

Actions	#	Intervention	Status

Signed Notes

Signed by Wherry, Sue, 1/8/2016 3:23:51 PM:
note documenting the child's SED status and justification for services. Enter

Allow Disclosure: Yes Cancel Save Finish  

Unsigned Notes

11. In administrative actions box click **Release to Billing.**

The screenshot displays a software interface with a blue sidebar on the left containing a menu of options. The main content area includes several sections:

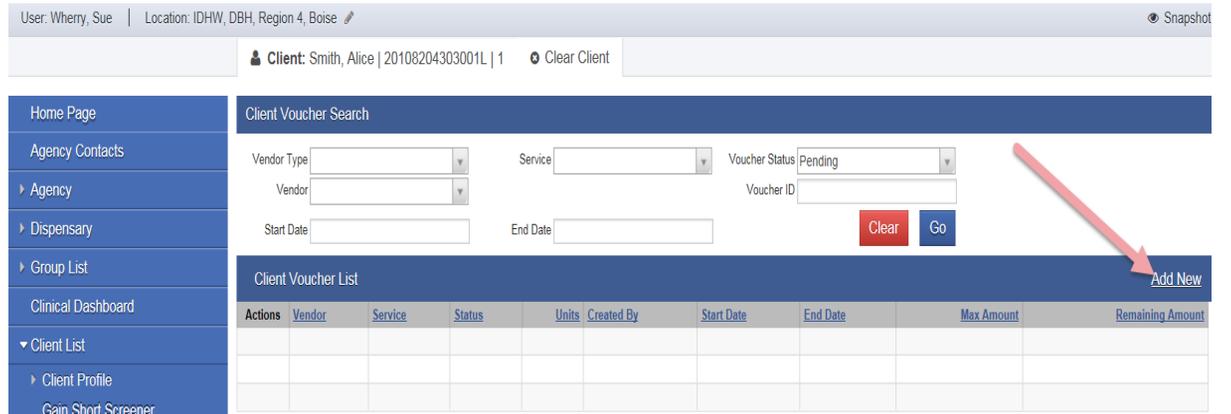
- Add Objectives:** A table with columns for 'Actions', 'Obj #', 'Objective', and 'Description'.
- Add Interventions:** A table with columns for 'Actions', '#', 'Intervention', and 'Status'.
- Signed Notes:** A text area containing a note signed by 'Wherry, Sue' on 1/8/2016 at 3:23:51 PM, with the content 'note documenting the child's SED status and justification for services.Enter'. Below this are buttons for 'Allow Disclosure' (set to 'Yes'), 'Cancel', 'Save', 'Finish', and navigation arrows.
- Unsigned Notes:** An empty text area for adding new notes.
- Administrative Actions:** A box containing a link for 'Release to Billing', which is highlighted by a red arrow.

Create Voucher for Respite Services

12. Click **Treatment** and **Client Voucher** on the Navigation Pane



13. Click **Add New** on the right side of the blue bar.



14. **Complete all yellow fields** on the Voucher Profile.

15. Click **Save** and **Finish**.

NOTE: The Voucher must be approved by a staff person with the Voucher Sign-Off permission. The staff person who created the Voucher cannot Sign the Voucher.

16. **Provide the family with the Voucher and Introduction Letter for IFF.**

User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise | Generate Report Snapshot

Client: Smith, Alice | 20108204303001L | 1 Clear Client

Client Voucher Profile

Agency	IDHW, DBH, Region 4	Facility	Boise	Voucher #	
Client First	Alice	Client Last	Smith	Status	
Unique Client Number	20108204303001L				
Service	Respite Care				
Vendor	Idaho Federation of Families				
Units	10	Amount(Max)			
Start Date	12/28/2015	End Date	01/25/2016		
For use by	<input type="text"/>				
NOTES	<input type="text"/>				
Created By	<input type="text"/>	Created On	<input type="text"/>		
Updated By	<input type="text"/>	Updated On	<input type="text"/>		
Duration	<input type="text"/>	Duration Type	<input type="text"/>		
Dollar for Dollar	Yes				
Rate	\$0.01				

Cancel Save Finish



Closing the Program Enrollment when the client no longer needs Respite Services.

17. At the completion of Respite Care Services, on the Client Activity List, hover over the  and click **Review** under the actions column for the Program Enrollment .

User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise

Client: Smith, Alice | 20108204303001L | 1 Clear Client

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	12/28/2015	1/7/2016	Completed
	Intake Transaction	12/28/2015	1/7/2016	Completed
	Client Program Enrollment (Respite Care)	12/28/2015	1/7/2016	Completed
Review	Note Summary	12/28/2015	12/28/2015	Not Applicable
	Client Eligibility	1/7/2016	1/7/2016	Withdrawn

18. Enter the **End Date**, select the **Termination Reason**, and enter **Notes** as clinically appropriate.

19. Click **Finish**.

User: Wherry, Sue | Location: IDHW, DBH, Region 4, Boise

Client: Smith, Alice | 20108204303001L | 1 Clear Client

Program Enrollment Profile

Facility Boise

Program Name Respite Care

Program Staff Wherry, Sue

Days on Wait List Start Date 12/28/2015 End Date 1/7/2016

Termination Reason Admin termination

Notes Respite Care has ended

Cancel Save Finish