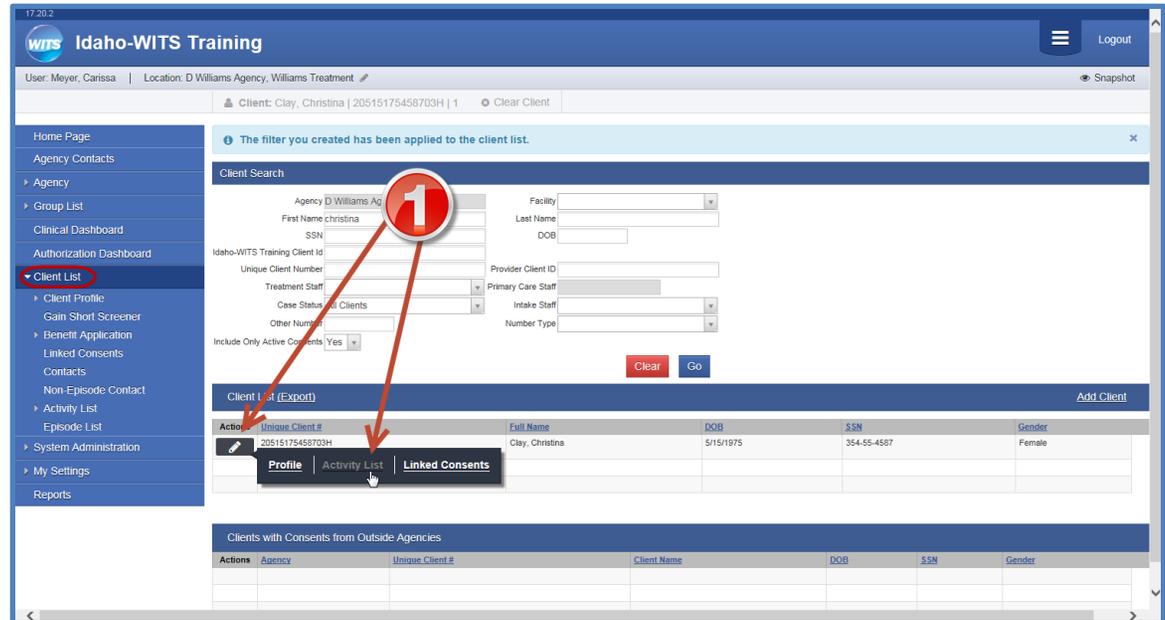


# ATR 4 - Creating Provisional Vouchers for a client with a Completed Consent and Referral

Utilize these instructions for **ONLY ATR4** clients who already have a completed Consent and Referral to the appropriate provider.

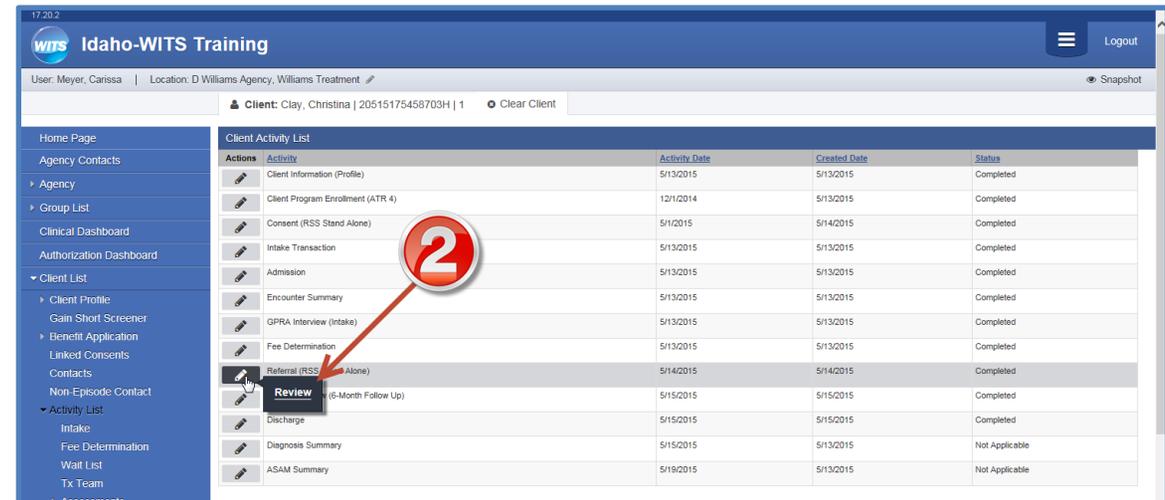
1. **Getting here:** Login, select the **Facility**, select **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen, find the client, click , and select **Activity List**.

2. Click  and select **Review** for the Referral for the appropriate provider on the Client Activity List.



The screenshot shows the 'Client Search' interface in the Idaho-WITS Training system. A red circle with the number '1' is placed over the pencil icon in the 'Actions' column of the client search table. The client's name is Clay, Christina.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
 Profile  Activity List  Linked Consents	20515175458703H	Clay, Christina	5/15/1975	354-55-4587	Female



The screenshot shows the 'Client Activity List' interface in the Idaho-WITS Training system. A red circle with the number '2' is placed over the 'Review' button in the 'Actions' column of the activity list table. The activity is 'Referral (RSS) (6-Month Follow Up)'.

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	5/13/2015	5/13/2015	Completed
	Client Program Enrollment (ATR 4)	12/1/2014	5/13/2015	Completed
	Consent (RSS Stand Alone)	5/1/2015	5/14/2015	Completed
	Intake Transaction	5/13/2015	5/13/2015	Completed
	Admission	5/13/2015	5/13/2015	Completed
	Encounter Summary	5/13/2015	5/13/2015	Completed
	GPRA Interview (Intake)	5/13/2015	5/13/2015	Completed
	Fee Determination	5/13/2015	5/13/2015	Completed
	Referral (RSS) (6-Month Follow Up)	5/14/2015	5/14/2015	Completed
 Review	Discharge	5/15/2015	5/15/2015	Completed
	Diagnosis Summary	5/15/2015	5/13/2015	Not Applicable
	ASAM Summary	5/16/2015	5/13/2015	Not Applicable

3. Select **Authorizations** on the Navigation Pane under Referral.

Home Page  
Agency Contacts  
Agency  
Group List  
Clinical Dashboard  
Authorization Dashboard  
Client List  
Client Profile  
Gain Short Screener  
Benefit Application  
Linked Consents  
Contacts  
Non-Episode Contact  
Activity List  
Intake  
Fee Determination  
Wait List  
Tx Team  
Assessments  
Diagnosis List  
Admission  
Encounters  
Notes  
ASAM  
Treatment  
Continuing Care  
Discharge  
Recovery Plan  
Recovery Plan Rvw  
Service Summary  
Consent  
GPRA  
Referrals  
**Authorizations**  
Payments

Referral

Referred By  
Agency D Williams Agency  
Facility Williams Treatment  
Staff Member Meyer, Carissa  
Program Williams Treatment(ATR 4 - 12/1/2014 - 5/15/2015)  
State Reporting Category  
Reason Service not available at this facility  
If Other  
Is Consent Verification Required? Yes  
Is Consent Verified? Yes  
Continue This Episode of Care? No

Comments

Referred To  
Signed Consents RSS Stand Alone  
Agency RSS Stand Alone  
Facility RSS Stand Alone - Boise  
Staff Member  
Program ATR 4  
State Reporting Category  
Non-System Agency  
Non-System Modality  
Non-System Specifier  
Appt Date  
Undetermined

Consents Granted  
Consent Date: 5/1/2015  
Disclosure Domains:  
Client Information (Profile) (UD, +365)  
Consent (UD, +365)  
Intake Transaction (UD, +365)

Cancel Save Finish

Referral Status Placed/Accepted  
Referral Date 5/14/2015  
Projected End Date  
Created Date 5/14/2015 5:29 PM

4. Click **Add New Authorization Record**.

17.20.2

WITS Idaho-WITS Training Logout

User: Meyer, Carissa | Location: D Williams Agency, Williams Treatment | Snapshot

Client: Clay, Christina | 20515175458703H | 1 | Clear Client

Home Page  
Agency Contacts  
Agency  
Group List  
Clinical Dashboard  
Authorization Dashboard  
Client List  
Client Profile  
Gain Short Screener  
Benefit Application  
Linked Consents  
Contacts  
Non-Episode Contact  
Activity List  
Intake  
Fee Determination  
Wait List  
Tx Team  
Assessments  
Diagnosis List  
Admission

Authorization List

Actions	Auth #	Payor	Status	Effective Date	End Date	Encumbered	Expended	Available	Last Activity Date
	4426	ATRA [ATRA, ATRA]	Provisional	5/14/2015	5/31/2015	0.00	0.00	0.00	5/14/2015

Add New Authorization Record

5. Update the Date Approved and the Effective Date if necessary. *These dates MUST NOT predate the Referral Date.*

6. Click Save.

7. Click Add Service.

Idaho-WITS Training

User: Meyer, Carissa | Location: D Williams Agency, Williams Treatment

Client: Clay, Christina | 20515175458703H | 1

Authorization

Group Enrollment: ATR4 | Status: Pending

Plan: ATR4 | Contract: ATR4 - RSS Provider (ATR4) / 12/1/2014 - 9/29/2017

Authorization #: [redacted] | Date Approved: 5/20/2015

Administering Agency: D Williams Agency | Updated Date: [redacted]

Effective Date: 5/20/2015 | End Date: [redacted]

Authorized Services List

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Amount	Available Units

Total Authorized: 0.0  
Total Encumbered: 0.0  
Total Expended: 0.0  
Total Available: 0.0

Buttons: Cancel, Save, Finish

Idaho-WITS Training

User: Meyer, Carissa | Location: D Williams Agency, Williams Treatment

Client: Clay, Christina | 20515175458703H | 1

Authorization

Group Enrollment: ATR4 | Status: Pending

Plan: ATR4 | Contract: ATR4 - RSS Provider (ATR4) / 12/1/2014 - 9/29/2017

Authorization #: [redacted] | Date Approved: 5/20/2015

Administering Agency: D Williams Agency | Updated Date: [redacted]

Effective Date: 5/20/2015 | End Date: [redacted]

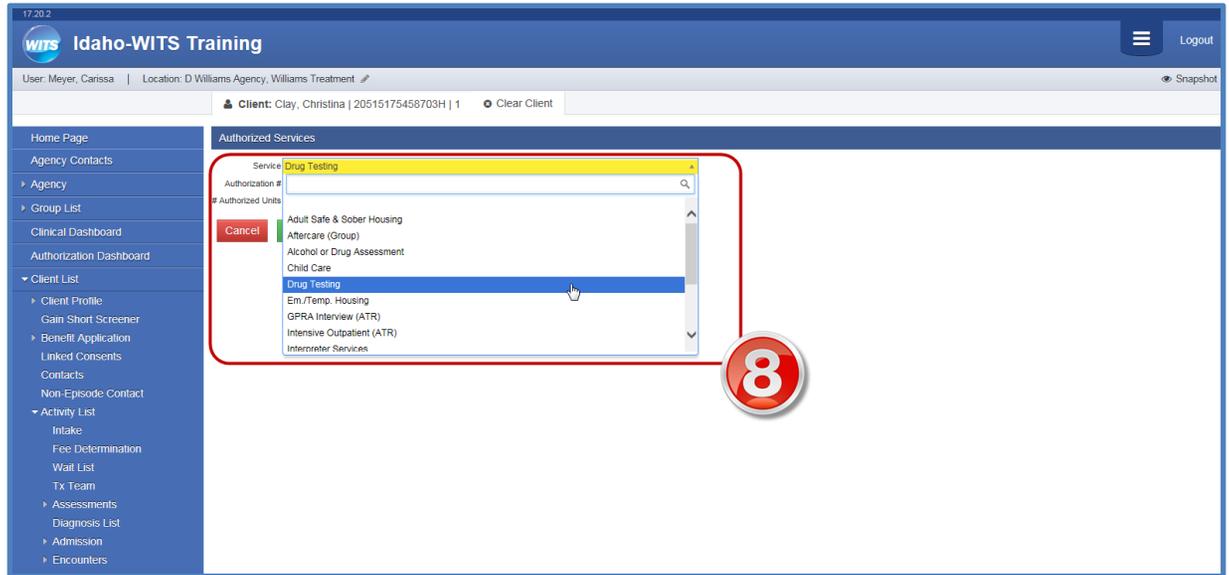
Authorized Services List

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Amount	Available Units

Total Authorized: 0.0  
Total Encumbered: 0.0  
Total Expended: 0.0  
Total Available: 0.0

Buttons: Cancel, Save, Finish

8. Select the **Service**.



9. Click **Save** and **Finish**.



10. Add Additional Services if needed.

17.20.2  
WITS Idaho-WITS Training  
User: Meyer, Carissa | Location: D Williams Agency, Williams Treatment | Snapshot  
Client: Clay, Christina | 20515175458703H | 1 | Clear Client

Authorization  
Group Enrollment: ATR4 | Status: Provisional  
Plan: ATR4 | Contract: ATR4 - RSS Provider (ATR4) / 12/1/2014 - 9/29/2017  
Authorization #: 5433 | Date Approved: 5/20/2015  
Administering Agency: D Williams Agency | Updated Date: 5/20/2015 4:12 PM  
Effective Date: 5/20/2015 | Updated By: Meyer, Carissa  
End Date: [ ]

Comments

Authorized Services List

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Amount	Available Units
	Drug Testing	0	\$0.00	\$0.00	\$0.00	\$0.00	0.00

Actions: [ ]

Total Authorized: \$0.00  
Total Encumbered: \$0.00  
Total Expended: \$0.00  
Total Available: \$0.00

Buttons: Cancel Save Finish

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11. Click Save and Finish.

17.20.2  
WITS Idaho-WITS Training  
User: Meyer, Carissa | Location: D Williams Agency, Williams Treatment | Snapshot  
Client: Clay, Christina | 20515175458703H | 1 | Clear Client

Authorization  
Group Enrollment: ATR4 | Status: Provisional  
Plan: ATR4 | Contract: ATR4 - RSS Provider (ATR4) / 12/1/2014 - 9/29/2017  
Authorization #: 5433 | Date Approved: 5/20/2015  
Administering Agency: D Williams Agency | Updated Date: 5/20/2015 4:12 PM  
Effective Date: 5/20/2015 | Updated By: Meyer, Carissa  
End Date: [ ]

Comments

Authorized Services List

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Amount	Available Units
	Drug Testing	0	\$0.00	\$0.00	\$0.00	\$0.00	0.00

Actions: [ ]

Total Authorized: \$0.00  
Total Encumbered: \$0.00  
Total Expended: \$0.00  
Total Available: \$0.00

Buttons: Cancel Save Finish

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