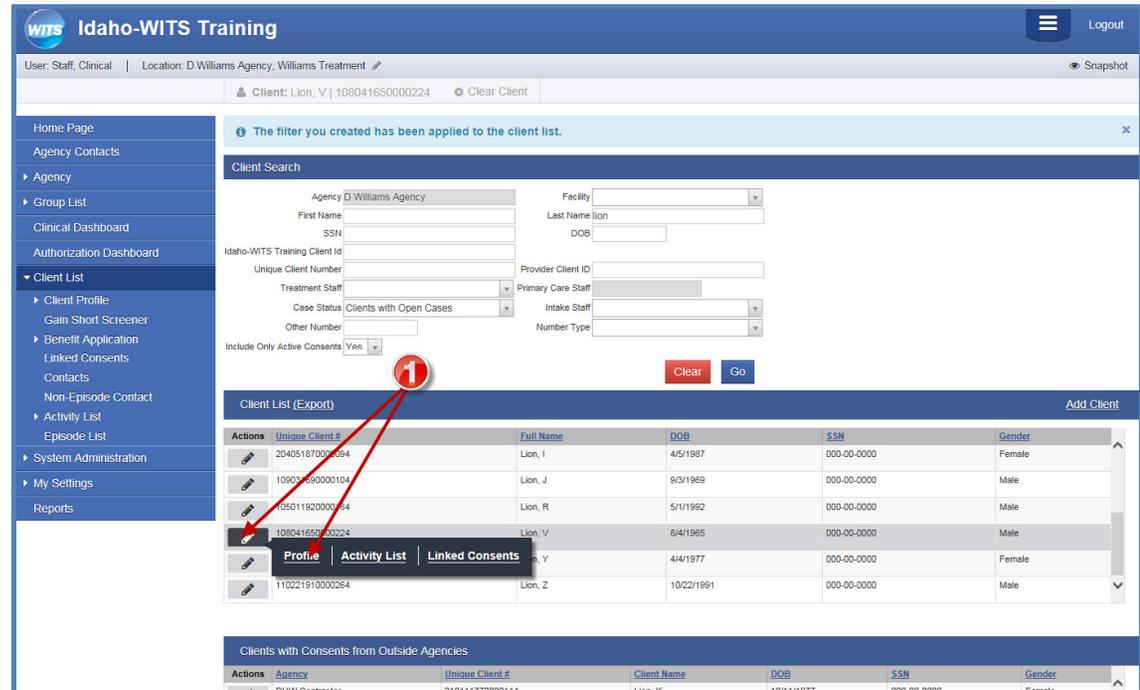


Authorization Change Request – Change to Service for ATR 4 Clients who are not changing facilities or agencies

These instructions are to be used in the following situations.

- Request additional treatment units for the ATR 4 client at the current treatment Level of Care (LOC) at the current facility at my agency.

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



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 current location is shown as "D Williams Agency, Williams Treatment". A search bar at the top right contains the text "Client: Lion, V | 10804165000224" and a "Clear Client" button. A notification banner states "The filter you created has been applied to the client list." The main content area is divided into two sections: "Client Search" and "Client List (Export)". The "Client Search" section contains various filters for Agency, Facility, First Name, Last Name, SSN, DOB, Unique Client Number, Provider Client ID, Treatment Staff, Primary Care Staff, Case Status, Intake Staff, and Other Number. The "Client List (Export)" section is a table with columns for Actions, Unique Client #, Full Name, DOB, SSN, and Gender. A red circle with the number 1 highlights the pencil icon next to the client entry for Lion, V. A tooltip menu is visible over the pencil icon, showing options for "Profile", "Activity List", and "Linked Consents".

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	204051870000394	Lion, I	4/5/1987	000-00-0000	Female
	10803690000104	Lion, J	9/3/1969	000-00-0000	Male
	0501192000004	Lion, R	5/1/1992	000-00-0000	Male
	10804165000224	Lion, V	8/4/1965	000-00-0000	Male
	Y	4/4/1977	000-00-0000	Female	
	110221910000264	Lion, Z	10/22/1991	000-00-0000	Male

Actions	Agency	Unique Client #	Client Name	DOB	SSN	Gender
	D Williams Agency	21044372000144	Lion, K	10/14/1977	000-00-0000	Female

2. Select the **Authorization** on the Navigation Pane

The screenshot shows the 'Client Profile' page for a client named 'Lion, V'. The left-hand navigation pane is expanded to show the 'Client Profile' section, where the 'Authorization' option is highlighted with a red circle and a red arrow pointing to it. The main content area displays the client's profile information, including first name, middle name, last name, gender, date of birth, and social security number. Below the profile information, there are sections for 'Administrative Actions', 'Alternate Names', and 'Addresses'. The 'Administrative Actions' section has buttons for 'Cancel', 'Save', and 'Finish'. The 'Alternate Names' and 'Addresses' sections have 'Add' buttons and tables for listing names and addresses.

3. Click  and select **Profile** to review the active Authorization.

The screenshot shows the 'Authorization List' page for the same client. The left-hand navigation pane is expanded to show the 'Client Profile' section, where the 'Authorization' option is highlighted with a red circle and a red arrow pointing to it. The main content area displays a table of authorization records. The table has columns for 'Auth #', 'Payer', 'Status', 'Effective Date', 'End Date', 'Authorized', 'Encumbered', 'Expended', 'Available', and 'Last Activity Date'. The first row is highlighted, and a red circle with the number '3' is placed over the 'Profile' button in the 'Actions' column for that row.

Actions	Auth #	Payer	Status	Effective Date	End Date	Authorized	Encumbered	Expended	Available	Last Activity Date
	3389	ATRA [ATRA, 7918BPA]	Active	4/17/2015	4/30/2015	\$961.80	\$0.00	\$0.00	\$961.80	4/17/2015
	2036	CHW Adult [State General, 1]	Closed	7/1/2014	3/18/2015	\$0.00	\$0.00	\$0.00	\$0.00	3/18/2015
	2036	CHW Adult [State General, 1]	Closed	7/1/2014	4/17/2015	\$0.00	\$0.00	\$0.00	\$0.00	4/17/2015

4. Click **Requests** under the Actions box.

The screenshot shows the 'Authorization' page for a client. The left sidebar contains a navigation menu with 'Client List' expanded to show 'Client Profile'. The main content area displays authorization details for 'Lion, V | 108041650000224'. A red circle with the number '4' and an arrow points to the 'Requests' button in the 'Actions' section at the bottom left. The 'Authorized Services List' table is visible below the details.

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
Outpatient	25	\$231.00	\$0.00	\$0.00	25.00
Drug/Alcohol Testing	25	\$337.50	\$0.00	\$0.00	25.00

5. The Authorization Change Request List displays. Click **Add New**.

The screenshot shows the 'Provider Authorization Change Request' page. A red circle with the number '5' and an arrow points to the 'Add New' button in the 'Authorization Change Request List' section at the bottom right. The page displays details for a change request, including group enrollment, plan, and dates.

6. The Authorization Change Request List displays. Select **Change to Service**.

The screenshot shows the 'Authorization Change Request Profile' page. A red circle with the number '6' and an arrow points to the 'Type' dropdown menu in the form. A text box next to the arrow says 'Select the Type of Change to Service'. The 'Actions' section at the bottom includes 'Add ASAM Concurrent Review', 'Cancel', 'Save', and 'Finish' buttons.

7. Select the **Service** (the current treatment LOC), enter the **Number of Requested Units**, and select the **Justification Reason**.

8. **Comments.**

- **Request additional treatment units for the ATR 4 client at the current treatment Level of Care (LOC) at the current facility at my agency.** Enter justification for additional units. If new or additional RSS services are requested, include the name of the service, number of units, and justification for each RSS service. Include the name of the Stand Alone RSS provider if applicable (create a provisional voucher for the provider after the authorization change request is complete).

9. Click **Add ASAM Concurrent Review**.

The screenshot shows the 'Authorization Change Request Profile' form for a client named 'Lion, V | 108041650000224'. The form includes a left-hand navigation menu with options like 'Home Page', 'Agency Contacts', 'Agency', 'Group List', 'Clinical Dashboard', 'Authorization Dashboard', and 'Client List'. The main form area contains the following fields:

- Type:** Change to Service
- Service:** Outpatient
- Additional Units:** 240
- End Date:** (empty)
- Justification:** Client will continue treatment p...
- Requestor Comments:** Enter justification for additional units. If new or additional RSS services are requested, include the name of the service, number of units, and justification for each RSS service. Include the name of the Stand Alone RSS provider if applicable.
- Approver's Comments:** (empty)
- Deny Reason:** (empty)
- Other Description:** (empty)
- Actions:** Add ASAM Concurrent Review

Red callout boxes with numbers 7, 8, and 9 point to the 'Service' field, the 'Justification' field, and the 'Add ASAM Concurrent Review' button, respectively. At the bottom right, there are 'Cancel', 'Save', and 'Finish' buttons.

10. Update the **Level of Care** for each Dimension.

11. Update **Comments** for each Dimension.
Enter the updated information at the top of each Comment field and document it as: Update (date). **DO NOT DELETE ANY PREVIOUS COMMENTS.**

12. Select the **Requested Level of Care** and the **Current Level of Care**.

13. Click **Sign ASAM**.

Client: Lion, V | 108041650000224 | 1 Clear Client

ASAM — PPC2R

Dimension 1 - Acute Intoxication and/or Withdrawal Potential

Update the LOC. Level of Care: 1.0 Outpatient

Update 4/2/15 Enter new ASAM comments for the dimension or indicate No Change. Admission ASAM Comments for Dimension 1.

Enter information at the top of the Comment field with the date.

Dimension 2 - Biomedical Conditions and Complications

Update the LOC. Level of Care: 1.0 Outpatient

Update 4/2/15 Enter new ASAM comments for the dimension or indicate No Change. Admission ASAM Comments for Dimension 2.

Enter information at the top of the Comment field with the date.

Dimension 3 - Emotional, Behavioral, or Cognitive Conditions and Complications

Update the LOC. Level of Care: 1.0 Outpatient

Update 4/2/15 Enter new ASAM comments for the dimension or indicate No Change. Admission ASAM Comments for Dimension 3.

Enter information at the top of the Comment field with the date.

Dimension 4 - Readiness to Change

Update the LOC. Level of Care: 1.0 Outpatient

Update 4/2/15 Enter new ASAM comments for the dimension or indicate No Change. Admission ASAM Comments for Dimension 4.

Enter information at the top of the Comment field with the date.

Dimension 5 - Relapse, Continued Use, or Continued Problem Potential

Update the LOC. Level of Care: 1.0 Outpatient

Update 4/2/15 Enter new ASAM comments for the dimension or indicate No Change. Admission ASAM Comments for Dimension 5.

Enter information at the top of the Comment field with the date.

Dimension 6 - Recovery / Living Environment

Update the LOC. Level of Care: 1.0 Outpatient

Update 4/2/15 Enter new ASAM comments for the dimension or indicate No Change. Admission ASAM Comments for Dimension 6.

Enter information at the top of the Comment field with the date.

Requested Level of Care: 1.0 Outpatient Clinical Override: [dropdown]

Current Level of Care: 1.0 Outpatient

Comments: [text area]

Review Date: 04/02/2015 Program: Williams Treatment/Adult Outpatient : 4/2/201...

Administrative Actions

Sign ASAM

ASAM Notes

Cancel Save Finish

14. Click **Finish**.

Client: Lion, V | 10804165000224 | 1 Clear Client

ASAM — PPC2R

Dimension	Level of Risk	Level of Care	Comments
1 - Acute Intoxication and/or Withdrawal Potential	<input type="text"/>	1.0 Outpatient	Update 4/2/15 Enter new ASAM comments for the dimension or indicate No Change. Admission ASAM Comments for Dimension 1.
2 - Biomedical Conditions and Complications	<input type="text"/>	1.0 Outpatient	Update 4/2/15 Enter new ASAM comments for the dimension or indicate No Change. Admission ASAM Comments for Dimension 2.
3 - Emotional, Behavioral, or Cognitive Conditions and Complications	<input type="text"/>	1.0 Outpatient	Update 4/2/15 Enter new ASAM comments for the dimension or indicate No Change. Admission ASAM Comments for Dimension 3.
4 - Readiness to Change	<input type="text"/>	1.0 Outpatient	Update 4/2/15 Enter new ASAM comments for the dimension or indicate No Change. Admission ASAM Comments for Dimension 4.
5 - Relapse, Continued Use, or Continued Problem Potential	<input type="text"/>	1.0 Outpatient	Update 4/2/15 Enter new ASAM comments for the dimension or indicate No Change. Admission ASAM Comments for Dimension 5.
6 - Recovery / Living Environment	<input type="text"/>	1.0 Outpatient	Update 4/2/15 Enter new ASAM comments for the dimension or indicate No Change. Admission ASAM Comments for Dimension 6.

Requested Level of Care: 1.0 Outpatient Clinical Override:

Current Level of Care: 1.0 Outpatient

Review Date: 4/2/2015 Program: Williams Treatment/Adult Outpatient : 4/2/2015

Administrative Actions

Signed by: Staff, Clinical Signed on: 3/24/2015

ASAM Notes

15. Click **Finish**.

User: Staff, Clinical | Location: D Williams Agency, Williams Treatment

Client: Lion, V | 10804165000224 Clear Client

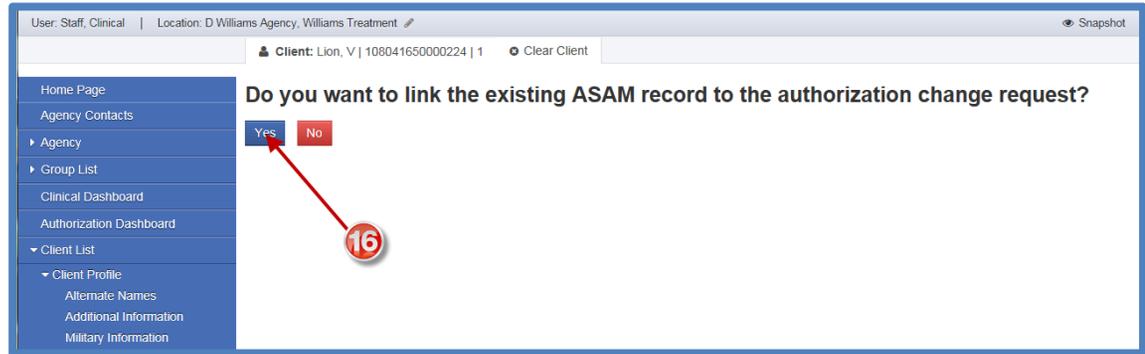
Authorization Change Request Profile

Type	Change to Service
Service	Outpatient (ATR)
Additional Units	30
End Date	
Justification	Client will continue treatment p...
Requestor Comments	Client will be transferring to the Another Treatment Provider. LOC change from IOP to OP. New RSS Services requested. Case Management 30 units for the RSS Stand Alone Provider. Client needs case management while in treatment.
Approver's Comments	
Deny Reason	
Other Description	

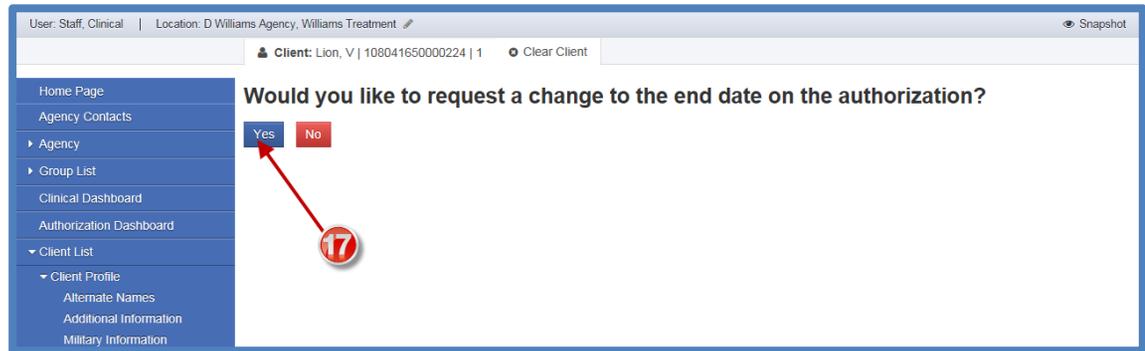
Actions

[Add ASAM Concurrent Review](#)

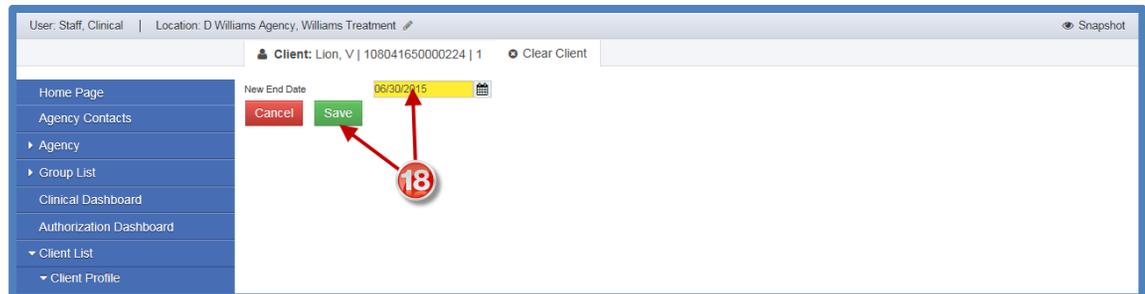
16. Select **Yes** to link the ASAM record with the Authorization Change Request.



17. Select **Yes** to request a change to the end date Authorization if appropriate.



18. Enter the **New End Date** and click **Save**.



19. Click **Finish**.

User: Staff, Clinical | Location: D Williams Agency, Williams Treatment | Snapshot

Client: Lion, V | 108041650000224 | 1 Clear Client

Home Page

Agency Contacts

Agency

Group List

Clinical Dashboard

Authorization Dashboard

Client List

Client Profile

- Alternate Names
- Additional Information
- Military Information
- Contact Info
- Collateral/Cust. Contacts
- Other Numbers
- History
- Client Group Enrollment
- Authorization
- Employment
- Allergies
- Gain Short Screener

Provider Authorization Change Request

Group Enrollment: ATR4 | Status: Active | Contract: 7919BPBA - DHW-D Williams (ATR4) / 12/1/2014 - 9/29/2

Plan: ATR4 | Authorization #: 3389 | Date Approved: 4/17/2015

Effective Date: 4/17/2015 | End Date: 4/30/2015 | Updated Date: 4/17/2015 | Updated By: Buskey, Michelle | ATR Intake: 4/17/2015-Williams Tre

Comments

Authorization Change Request List [Add New](#)

Actions	Date	Type	Service	Units	End Date	Status	Justification
	4/17/2015	Add New Service	Intensive Outpatient (ATR)	240		Pending	See comments.
	4/17/2015	Change Voucher End Date			6/30/2015	Pending	See comments.

19 → [Finish](#)