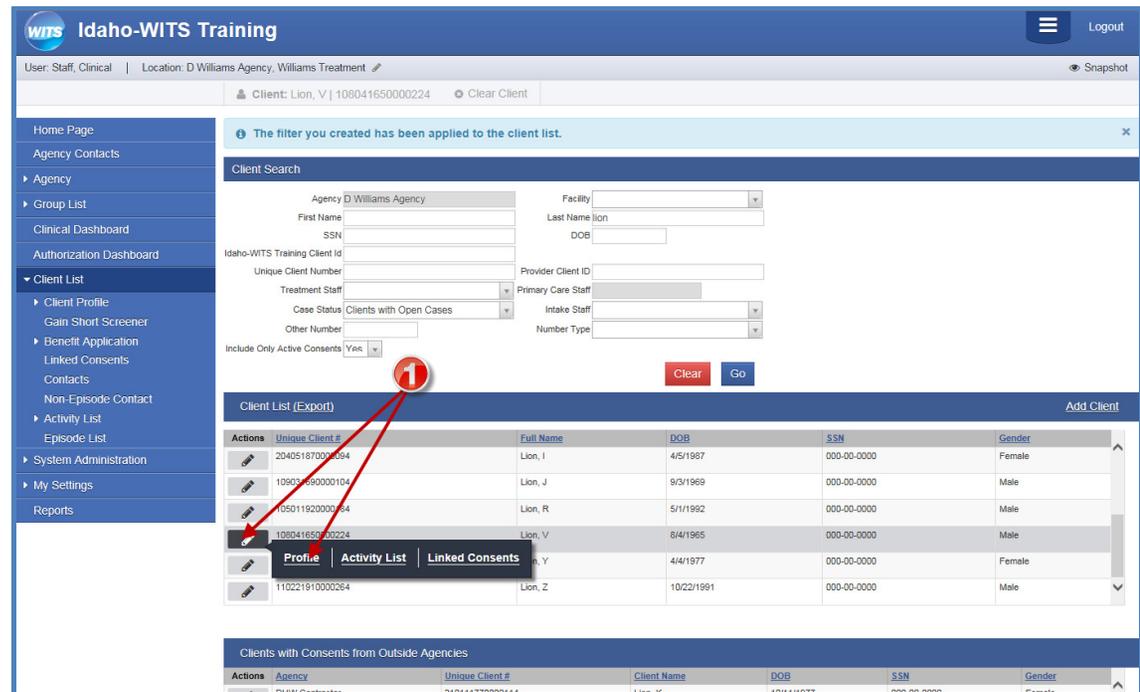


Authorization Change Request – Note to Authorizer for ATR 4 Clients who are Transferring to another Facility at my Agency

These instructions are to be used in the following Situations.

- Transfer an ATR 4 client from Assessment to a treatment Level of Care (LOC) at a different 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 shows the Idaho-WITS Training interface. The top navigation bar includes the WITS logo, user information (User: Staff, Clinical), location (Location: D Williams Agency, Williams Treatment), and a Logout button. Below the navigation bar, there is a search bar with 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, Idaho-WITS Training Client Id, Unique Client Number, Provider Client ID, Treatment Staff, Primary Care Staff, Case Status, Clients with Open Cases, Intake Staff, Other Number, and Number Type. There are "Clear" and "Go" buttons at the bottom of the search filters. The "Client List (Export)" section displays 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 in the Actions column for the client with Unique Client # 10804165000224. A tooltip menu is visible over this row, showing options for Profile, Activity List, and Linked Consents. Below the main table, there is a section for "Clients with Consents from Outside Agencies" with a similar table structure.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	204051870001394	Lion, I	4/5/1987	000-00-0000	Female
	108031990000104	Lion, J	9/3/1969	000-00-0000	Male
	05011920000104	Lion, R	5/1/1992	000-00-0000	Male
	10804165000224	Lion, V	8/4/1965	000-00-0000	Male
	Y	Y	4/4/1977	000-00-0000	Female
	110221910000264	Lion, Z	10/22/1991	000-00-0000	Male

Actions	Agency	Unique Agency #	Client Name	DOB	SSN	Gender
	D Williams Agency	210544372000144	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 'Client Profile', and 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 'Client Profile', and 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 'Profile' button is visible next to it. A red circle with the number '3' is placed over the 'Profile' button, with a red arrow pointing to it.

Auth #	Payer	Status	Effective Date	End Date	Authorized	Encumbered	Expended	Available	Last Activity Date
3389	ATR4 [ATR4, 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 named 'Lion, V'. The page includes a sidebar with navigation options like 'Home Page', 'Agency Contacts', 'Group List', and 'Client Profile'. The main content area displays authorization details such as 'Group Enrollment', 'Plan', 'Authorization #', 'Effective Date', and 'End Date'. A table titled 'Authorized Services List' shows services like 'Outpatient' and 'Drug/Alcohol Testing' with columns for 'Authorized Units', 'Authorization Amt', 'Encumbered', 'Expended', and 'Available Units'. At the bottom, there is an 'Actions' box with a 'Requests' button highlighted by a red arrow and a circled '4'. Other buttons include 'Close' and 'Finish'.

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

The screenshot shows the 'Provider Authorization Change Request' page. It features a sidebar with navigation options similar to the previous page. The main content area displays details for a 'Provider Authorization Change Request', including 'Group Enrollment', 'Plan', 'Authorization #', 'Effective Date', and 'End Date'. A table titled 'Authorization Change Request List' is shown with columns for 'Actions', 'Date', 'Type', 'Service', 'Units', 'End Date', 'Status', and 'Justification'. The 'Add New' button is highlighted by a red arrow and a circled '5'. A 'Finish' button is located at the bottom right.

6. The Authorization Change Request List displays. Select **Note to Authorizer**.

7. Enter **Comments**.

- **Transfer an ATR 4 client from Assessment to a treatment LOC at a different facility at my agency:** document the date the GRRS is consented to DHW Contractor, and include the recommended LOC.

8. Click **Save** and **Finish**.

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

Client: Lion, V | 108041650000224 | 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

Authorization Change Request Profile

Type: [Dropdown menu highlighted in yellow]

Service: [Text field]

Units: [Text field]

End Date: [Text field]

Justification: [Text field]

Requestor Comments: [Text area]

Approver's Comments: [Text area]

Deny Reason: [Text field] Other Description: [Text field]

Actions: [Text field]

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Cancel Save Finish

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

Client: Lion, V | 108041650000224 | 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

Authorization Change Request Profile

Type: Note to Authorizer

Service: [Text field]

Units: [Text field]

End Date: [Text field]

Justification: [Text field]

Requestor Comments: [Text area highlighted in yellow]

Approver's Comments: [Text area]

Deny Reason: [Text field] Other Description: [Text field]

Actions: [Text field]

[Add ASAM Concurrent Review](#)

Cancel Save Finish