

ATR 4 - Creating the Consent, Referral, and Initial Provisional Voucher

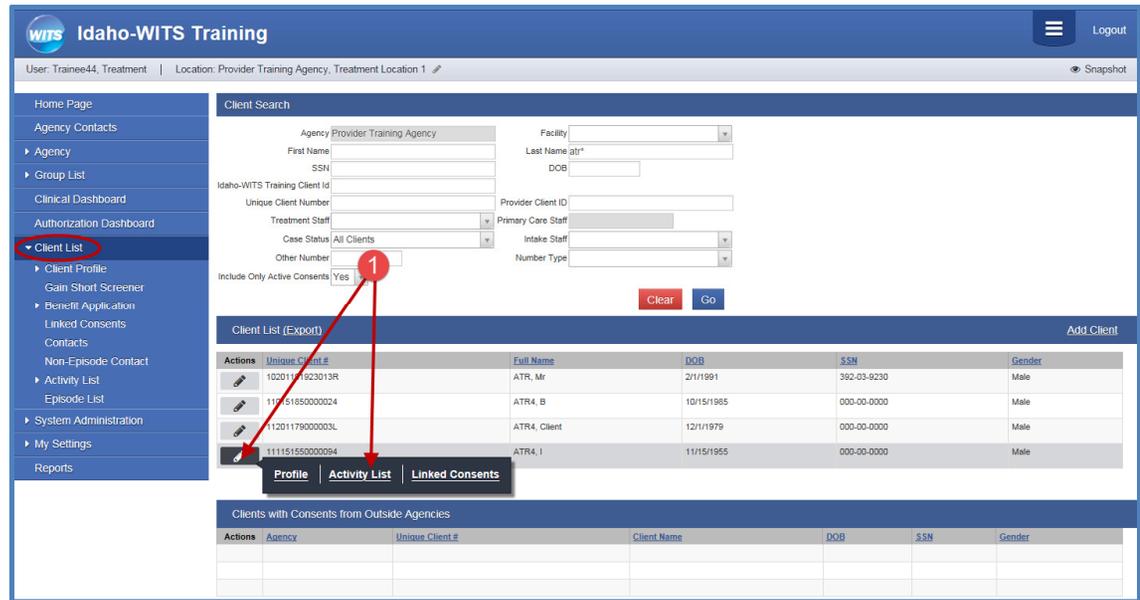
Create the Consent

Utilize these instructions for **ONLY ATR4** clients to create the initial Provisional Voucher for another agency.

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**.

NOTE: The Intake Activity Date will be used as the Earliest Date of Consented Activities on the Consent.

2. The Activity List Displays. **Note the Intake Date.**



Idaho-WITS Training

User: Trainee44, Treatment | Location: Provider Training Agency, Treatment Location 1

Client Search

Agency: Provider Training Agency | Facility: [Dropdown]

First Name: [Text] | Last Name (alt*): [Text]

SSN: [Text] | DOB: [Text]

Idaho-WITS Training Client Id: [Text]

Unique Client Number: [Text] | Provider Client ID: [Text]

Treatment Staff: [Dropdown] | Primary Care Staff: [Text]

Case Status: All Clients | Intake Staff: [Dropdown]

Other Number: [Text] | Number Type: [Dropdown]

Include Only Active Consents: Yes

Clear Go

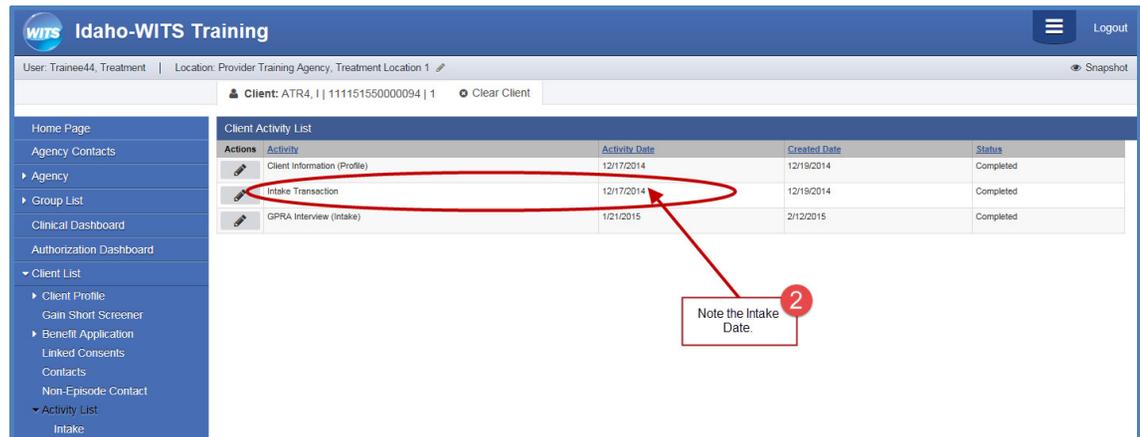
Client List (Export) Add Client

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	1020111823013R	ATR, Mr	2/1/1991	392-03-9230	Male
	11115185000024	ATR4, B	10/15/1965	000-00-0000	Male
	11201179000003L	ATR4, Client	12/1/1979	000-00-0000	Male
	11115155000094	ATR4, I	11/15/1955	000-00-0000	Male

Profile Activity List Linked Consents

Clients with Consents from Outside Agencies

Actions	Agency	Unique Client #	Client Name	DOB	SSN	Gender
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Idaho-WITS Training

User: Trainee44, Treatment | Location: Provider Training Agency, Treatment Location 1

Client: ATR4, I | 11115155000094 | 1 Clear Client

Client Activity List

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	12/17/2014	12/19/2014	Completed
	Intake Transaction	12/17/2014	12/19/2014	Completed
	GPRA Interview (Intake)	1/21/2015	2/12/2015	Completed

Note the Intake Date. 2

3. Select **Consent** on the Navigation Pane.

The screenshot shows a software interface with a navigation pane on the left and a main content area. The navigation pane is expanded to show the 'Client List' section, with 'Consent' highlighted at the bottom. A red arrow with the number '3' points to the 'Consent' item. The main content area displays a 'Client Activity List' table with the following data:

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	12/17/2014	12/19/2014	Completed
	Intake Transaction	12/17/2014	12/19/2014	Completed
	GPRA Interview (Intake)	1/21/2015	2/12/2015	Completed

4. Click **Add New Client Consent Record**.

The screenshot shows the same software interface, but the main content area now displays a 'Client Consent List' table. The table is currently empty. A red arrow with the number '4' points to the 'Add New Client Consent Record' button located at the top right of the table. The table has the following columns:

Actions	Start Date	Disclosed To	Status	Signed?	Created Date	Revocation Date

5. Select the **Disclosed to Agency** and enter the **Purpose for disclosure**.

6. Enter the **Intake Date as the Earliest date of services to be consented**.

7. Click **Save**.

The screenshot shows a web application window titled "Provider Training Agency, Treatment Location 1" with a "Snapshot" icon in the top right. The main content area is titled "Client Disclosure Agreement" and contains the following information:

- Note:** Consented information may not be redisclosed.
- Client Name:** ATR4, I
- Unique Client Number:** 111151550000094
- Disclosed From Agency:** Provider Training Agency

Below this information are several form fields:

- Entities with Disclosure Agreements:** A dropdown menu set to "All Other Agencies".
- System Agency:** A dropdown menu set to "Yes".
- Disclosed To Agency:** A dropdown menu set to "D Williams Agency".
- Disclosed To Entity (Non System Agency):** A dropdown menu.
- Purpose for disclosure:** A dropdown menu set to "Provisional Voucher".
- Earliest date of services to be consented:** A date field set to "12/17/2014".
- Has the client signed the paper agreement form:** A dropdown menu set to "No".

At the bottom of the form are three sections:

- Client Information Options:** A list of checkboxes for various services like Admission, ASAM, CAFAS® Assessment, etc.
- Consent Expires Upon:** Radio buttons for "Discharge(UD)", "Date Signed(DS)", and "Other Event(OE)", each with a "+Days" field and a calendar icon.
- Disclosure Selection:** A list of checkboxes for "Client Information (Profile) (UD, +365)", "Consent (UD, +365)", and "Intake Transaction (UD, +365)".

At the bottom right of the form are three buttons: "Cancel" (red), "Save" (green), and "Finish" (blue).

Red arrows and numbers point to specific fields:

- Arrow 5 points to the "Disclosed To Agency" dropdown.
- Arrow 6 points to the "Earliest date of services to be consented" date field.
- Arrow 7 points to the "Save" button.

NOTE: Click Print General Consent if you want to use the Release of Information generated from WITS

8. Select **Yes** after the client has signed the Release of Information.

9. The Date client signed consent will default to today's date. Update as necessary.

10. Click **Save**.

Provider Training Agency, Treatment Location 1 Snapshot

Client: ATR4, I | 11115155000094 | 1 Clear Client

Client Disclosure Agreement

Note: Consented information may not be redisclosed.

Client Name: ATR4, I
Unique Client Number: 11115155000094
Disclosed From Agency: Provider Training Agency

Entities with Disclosure Agreements: All Other Agencies
System Agency: Yes
Disclosed To Agency: D Williams Agency
Disclosed To Entity (Non System Agency):
Purpose for disclosure: Provisional Voucher
Earliest date of services to be consented: 12/17/2014
Has the client signed the paper agreement form: Yes 8 Date client signed consent: 2/12/2015 9

Client Information Options
CALOCUS Assessment
Client Eligibility
Court Admission
Court Case Management
Court Charge Received
Court Client Eligibility
Court Community Service
Court Criminal Justice
Court Current Situation
Court Discharge
Court Monitoring Form

Consent Expires Upon
 Discharge(UD) +Days:
 Date Signed(DS) +Days:
 Other Event(OE) Exp:
 Crim Just Cond (CJC) Exp:

Disclosure Selection
Client Information (Profile) (UD, +365)
Consent (UD, +365)
Intake Transaction (UD, +365)

Comments:
Other Disclosures:

Administrative Actions
[Print General Consent](#) [Print Criminal Justice Consent](#)

Cancel Save Finish 10

Create the Referral

11. Click **Create Referrals Using this Disclosure Agreement**.

User: Trainee44, Treatment | Location: Provider Training Agency, Treatment Location 1 | Snapshot

Client: ATR4, I | 11115155000094 | 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
Encounters
Notes
ASAM
Treatment
Continuing Care

Client Disclosure Agreement [Create Referral Using this Disclosure Agreement](#)

Note: Consented information may not be redisclosed.

Client Name: ATR4, I
Unique Client Number: 11115155000094
Disclosed From Agency: Provider Training Agency

Entities with Disclosure Agreements: All Other Agencies
System Agency: Yes
Disclosed To Agency: D Williams Agency
Disclosed To Entity (Non System Agency):
Purpose for disclosure: Provisional Voucher
Earliest date of services to be consented: 12/17/2014
Has the client signed the paper agreement form: Yes | Date client signed consent: 2/12/2015

Client Information Options
ASAM
CAFAS® Assessment
CALOCUS Assessment
Client Eligibility
Court Admission
Court Case Management
Court Charge Received
Court Client Eligibility
Court Community Service
Court Criminal Justice

Consent Expires Upon
 Discharge(UD) +Days
 Date Signed(DS) +Days
 Other Event(OE) Exp
 Crim Just Cond (CJC) Exp

Disclosure Selection
Client Information (Profile) (UD, +365)
Consent (UD, +365)
Intake Transaction (UD, +365)

Administrative Actions
[Print General Consent](#) [Print Criminal Justice Consent](#)

Finish Revoke

12. Select the **Reason**, for the Referral.

13. Select **Yes for Is Consent Verification Required**, select **Yes for Is Consent Verified**, and select **No for Continue this Episode of Care**.

14. Select the **Facility**.

15. Select **ATR4** as the Program.

16. Click **Save**.

Provider Training Agency, Treatment Location 1 | Snapshot

Client: ATR4, I | 11115155000094 | 1 | Clear Client

Referral

Referred By
Agency: Provider Training Agency
Facility: Treatment Location 1
Staff Member: Trainee44, Treatment
Program: Treatment Location 1/ATR 4 : 11/17/2014 -
State Reporting Category:
Reason: Client requested referral
If Other:
Is Consent Verification Required?: Yes
Is Consent Verified?: Yes
Continue This Episode of Care?: No

Referred To
Signed Consents: D Williams Agency
Agency: D Williams Agency
Facility: Williams Treatment
Staff Member:
Program: ATR 4
State Reporting Category:
Non-System Agency:
Non-System Modality:
Non-System Specifier:
Appt Date: Undetermined

Consents Granted
Consent Date: 12/17/2014
Disclosure Domains:
Client Information (Profile) (UD, +365)
Consent (UD, +365)
Intake Transaction (UD, +365)

Referral Status: Referral Created/Pending
Referral Date: 2/12/2015
Projected End Date:
Created Date: 2/12/2015 1:31 PM

Cancel Save Finish

Create the Provisional Voucher

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

Client: ATR4, | 111151550000094 | 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

Encounters

Notes

ASAM

Treatment

Continuing Care

Discharge

Recovery Plan

Recovery Plan Rvw

Service Summary

Consent

GPRA

Referrals

Authorizations

Referral

Referred By

Agency: Provider Training Agency

Facility: Treatment Location 1

Staff Member: Trainee4, Treatment

Program: Treatment Location 1/ATR 4 - 11/17/2014 -

State Reporting Category

Reason: Client requested referral

If Other

Is Consent Verification Required? Yes

Is Consent Verified? Yes

Continue This Episode of Care? No

Comments

Referral Status: Referral Created/Pending

Referral Date: 2/2/2015

Projected End Date

Created Date: 2/12/2015 1:52 PM

Referred To

Signed Consent: D Williams Agency

Agency: D Williams Agency

Facility: Williams Treatment

Staff Member: Williams Treatment

Program: ATR 4

State Reporting Category

Non-System Agency

Non-System Modality

Non-System Specifier

Appt Date: Undetermined

Consents Granted

Consent Date: 12/17/2014

Disclosure Domain:

Client Information (Profile) (UD, +365)

Consent (UD, +365)

Intake Transaction (UD, +365)

Cancel Save Finish

18. Click **Add New Authorization Record**.

Client: ATR4, | 111151550000094 | 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

Encounters

Notes

ASAM

Treatment

Continuing Care

Discharge

Recovery Plan

Recovery Plan Rvw

Service Summary

Consent

GPRA

Referrals

Authorizations

Authorization List

Add New Authorization Record

Actions	Auth.#	Pavec	Status	Effective Date	End Date	Encumbered	Expended	Available	Last Activity Date

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

20. Click Save.

Provider Training Agency, Treatment Location 1 Snapshot

Client: ATR4, I | 11115155000094 | 1 Clear Client

Authorization

Group Enrollment: Status: Pending

Plan: ATR4 Contract: 7919BPA - DHW-D Williams (ATR4) / 12/1/2014 - 9/29/2017

Authorization #: Date Approved: 2/12/2015

Administering Agency: Provider Training Agency Updated Date: Updated By:

Effective Date: 2/12/2015

End Date:

Comments:

Authorized Services List Add Service

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

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

Cancel Save Finish

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

21. Click Add Service.

Provider Training Agency, Treatment Location 1 Snapshot

Client: ATR4, I | 11115155000094 | 1 Clear Client

Authorization

Group Enrollment: Status: Provisional

Plan: ATR4 Contract: 7919BPA - DHW-D Williams (ATR4) / 12/1/2014 - 9/29/2017

Authorization #: 3303 Date Approved: 2/12/2015

Administering Agency: Provider Training Agency Updated Date: 2/12/2015 3:09 PM Updated By: Trainee44, Treatment

Effective Date: 2/12/2015

End Date:

Comments:

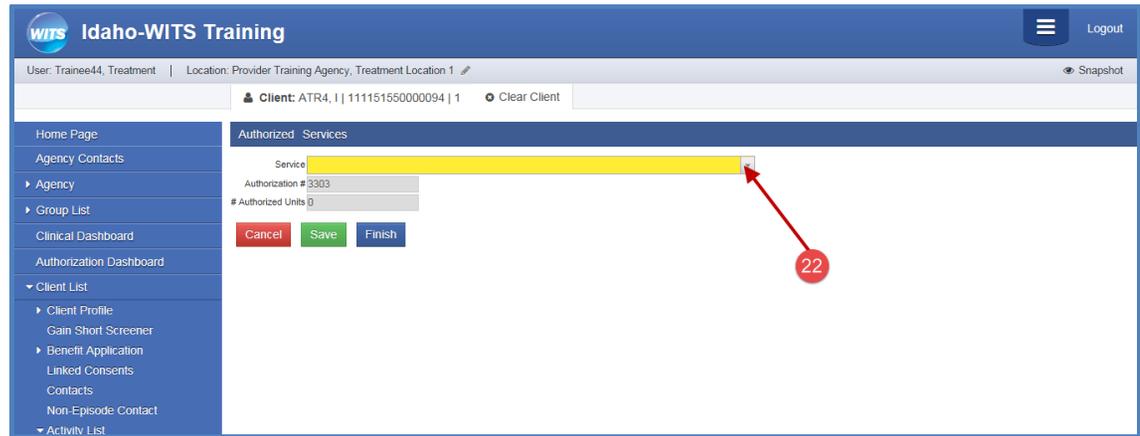
Authorized Services List Add Service

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

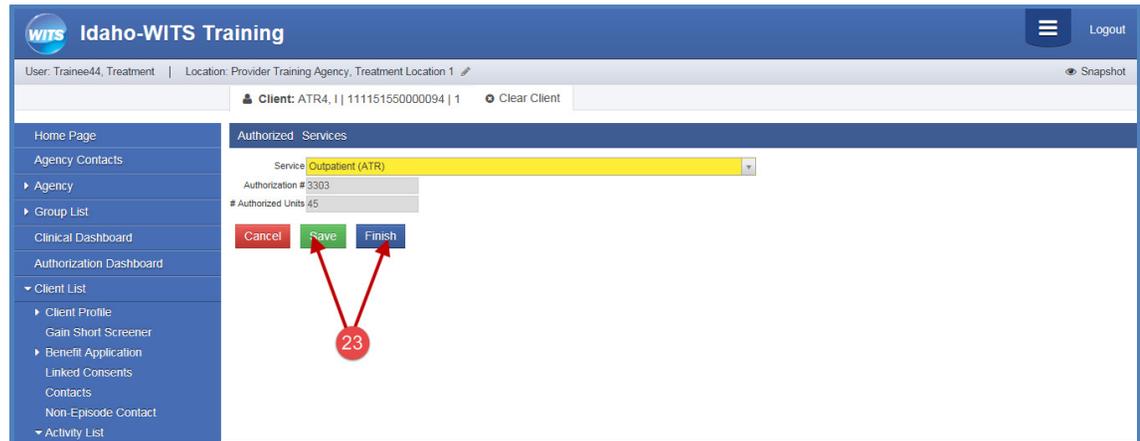
Total Authorized: \$0.00
Total Encumbered: \$0.00
Total Expended: \$0.00
Total Available: \$0.00

Cancel Save Finish

22. Select the Service.



23. Click Save and Finish.



24. Add Additional Services if needed.

25. Click Save and Finish.

The screenshot displays the 'Idaho-WITS Training' interface. The top navigation bar includes the WITS logo, the title 'Idaho-WITS Training', and a 'Logout' link. Below the navigation bar, the user is identified as 'Traine44, Treatment' and the location as 'Provider Training Agency, Treatment Location 1'. A 'Client' dropdown shows 'Client: ATR4, I | 11115155000094 | 1' with a 'Clear Client' button. A 'Snapshot' icon is also present.

The main content area is divided into a left sidebar and a main panel. The sidebar contains a menu with the following items: 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, and Notes.

The main panel is titled 'Authorization' and contains the following information:

- Group Enrollment: [Redacted]
- Status: Provisional
- Plan: ATR4
- Contract: 7919BPBA - DHW-D Williams (ATR4) / 12/1/2014 - 9/29/2017
- Authorization #: 3303
- Date Approved: 2/12/2015
- Administering Agency: Provider Training Agency
- Updated Date: 2/12/2015 3:09 PM
- Effective Date: 2/12/2015
- Updated By: Traine44, Treatment
- End Date: [Redacted]

Below this information is a 'Comments' text area. The 'Authorized Services List' section contains a table with the following data:

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Amount	Available Units
	Outpatient (ATR)	45	\$415.80	\$0.00	\$0.00	\$415.80	45.00

At the bottom right of the main panel, there is a summary of totals:

- Total Authorized: \$415.80
- Total Encumbered: \$0.00
- Total Expended: \$0.00
- Total Available: \$415.80

Below the totals are three buttons: 'Cancel', 'Save', and 'Finish'. Two red annotations are present: '24' with a red box around the text 'Add additional Services if needed.' and an arrow pointing to the 'Add Service' link in the table; and '25' with an arrow pointing to the 'Save' and 'Finish' buttons.