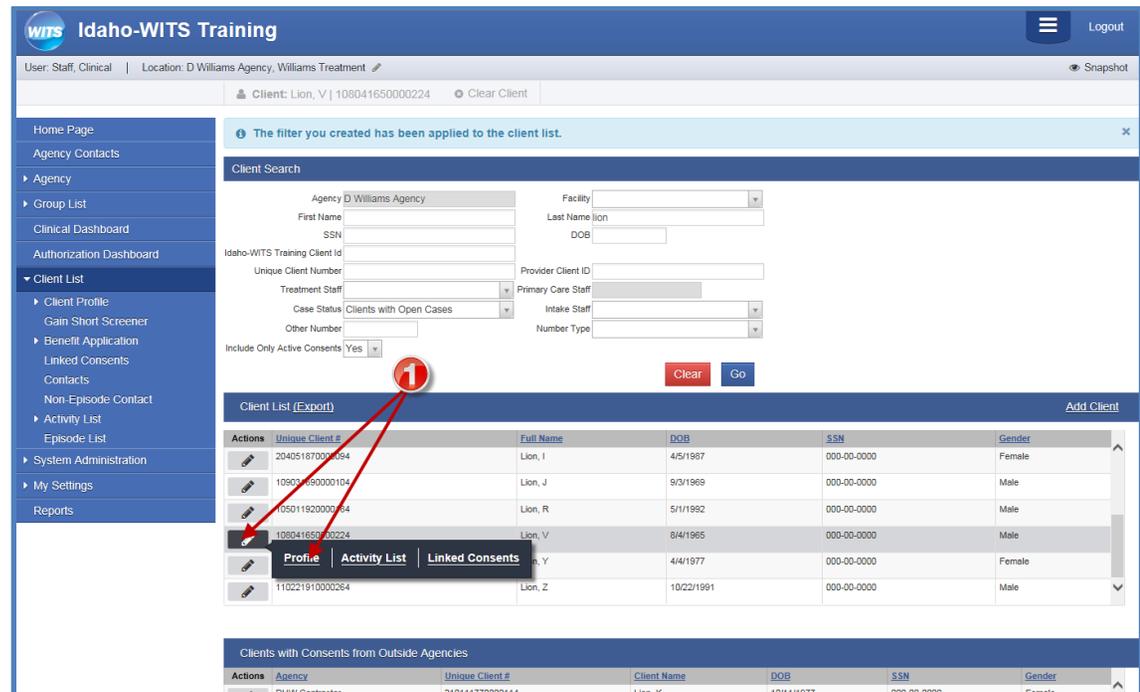


# Authorization Change Request – Add New Service for IDHW (non-ATR 4) Clients who are not changing facilities or agencies

These instructions are to be used in the following Situations.

- Transfer an IDHW client from one treatment Level of Care (LOC) to a different LOC at the current facility.

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 is logged in as "User: Staff, Clinical" and the location is "D Williams Agency, Williams Treatment". A search bar shows the current client: "Client: Lion, V | 10804165000224".

The main content area is divided into two sections. The top section is "Client Search", which contains various filters and search criteria. The bottom section is "Client List (Export)", which displays a table of clients. A red circle with the number 1 highlights the pencil icon in the "Actions" column of the table, indicating the action to be taken to view the client profile.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	204051870001094	Lion, I	4/5/1987	000-00-0000	Female
	109031990000104	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
	10804165000224	Lion, V	8/4/1965	000-00-0000	Male
	4441977	Y	4/4/1977	000-00-0000	Female
	110221910000264	Lion, Z	10/22/1991	000-00-0000	Male

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

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

Client: Lion, V | 108041650000224 | Clear Client

### Profile

First Name	V	Provider Client ID	
Middle Name		Unique Client Number	108041650000224
Last Name	Lion	State Client ID	
Suffix		Record Created By	Buskey, Michelle
Gender	Male	Last Updated By	Buskey, Michelle
DOB	8/4/1965	Created Date	3/4/2015 1:20 PM
SSN	000-00-0000	Last Updated Date	3/4/2015 1:20 PM

Driver's License:

Acc. Category:

Has paper file: Yes

Administrative Actions:

Cancel Save Finish →

### Alternate Names

Actions	Last Name	First Name	Middle Name	Client Alias Type

### Addresses

Actions	Address Type	Address	Confidential	Created	Updated
	Client Home	1255 Venus Circle Nez Perce, ID 87956	No	3/4/2015	3/4/2015

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

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

Client: Lion, V | 108041650000224 | Clear Client

### Authorization List

Actions	Auth #	Payor	Status	Effective Date	End Date	Authorized	Encumbered	Expended	Available	Last Activity Date
	2036	DHW Adult [State General, 1]	Active	7/1/2014	6/30/2015	\$568.50	\$0.00	\$0.00	\$568.50	3/4/2015
		DHW Adult [State General, 1]	Closed	7/1/2014	3/18/2015	\$0.00	\$0.00	\$0.00	\$0.00	3/18/2015

Profile

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

The screenshot shows the 'Authorization' page for a client named 'Lion, V'. The left sidebar contains a navigation menu with options like 'Home Page', 'Agency Contacts', 'Group List', and 'Client Profile'. The main content area is titled 'Authorization' and displays details for a specific authorization, including 'Group Enrollment', 'Plan', 'Status', 'Contract', 'Authorization #', 'Date Approved', 'Administering Agency', 'Effective Date', 'End Date', 'Updated Date', and 'Updated By'. Below this is a 'Comments' section and an 'Authorized Services List' table.

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

Below the table is an 'Actions' box with 'Close' and 'Requests' links. A red arrow points to the 'Requests' link, which is labeled with a red circle containing the number '4'. To the right of the 'Authorized Services List' table, there are summary statistics: 'Total Authorized: \$568.50', 'Total Encumbered: \$0.00', 'Total Expended: \$0.00', and 'Total Available: \$568.50'. A 'Finish' button is located at the bottom right of the page.

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

The screenshot shows the 'Provider Authorization Change Request' page for the same client. The layout is similar to the previous screenshot, but the main content area is titled 'Provider Authorization Change Request' and displays details for a specific change request, including 'Group Enrollment', 'Plan', 'Status', 'Contract', 'Authorization #', 'Date Approved', 'Effective Date', 'End Date', 'Updated Date', 'Updated By', and 'ATR Intake'. Below this is a 'Comments' section and an 'Authorization Change Request List' table.

Actions	Date	Type	Service	Units	End Date	Status	Justification

At the bottom right of the table, there is an 'Add New' link, which is labeled with a red circle containing the number '5'. A 'Finish' button is also present at the bottom right of the page.

6. The Authorization Change Request List displays. Select **Add New Service**.

User: Staff, Clinical | Location: D Williams Agency, Williams Treatment | Client: Lion, V | 10804165000224 | 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: [Add New Service] (6) Select the Type of Add New Service

Service: [ ]  
Units: [ ]  
End Date: [ ]  
Justification: [ ]  
Requestor Comments: [ ]  
Approver's Comments: [ ]  
Deny Reason: [ ] Other Description: [ ]

Actions: [Add ASAM Concurrent Review]

Cancel Save Finish

7. Select the **Service**, enter the **Number of Requested Units**, and select the **Justification Reason**.

8. **Comments.**

- **Transfer an IDHW client from a treatment LOC to a different treatment LOC at the current facility:** Note the current level of care (LOC) and the requested LOC. 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.

User: Staff, Clinical | Location: D Williams Agency, Williams Treatment | Client: Lion, V | 10804165000224 | 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: Add New Service (7)

Service: Intensive Outpatient (7)

Requested Units: 240 (7)

Justification: Client needs this service as pa... (8)

Requestor Comments: LOC change from OP to IOP. New RSS services requested: Case Management 90 units, Drug Testing, 90 units. Client needs case management and therapeutic drug testing while in treatment. (8)

Approver's Comments: [ ]  
Deny Reason: [ ] Other Description: [ ]

Actions: [Add ASAM Concurrent Review] (9)

Cancel Save Finish

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

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.**

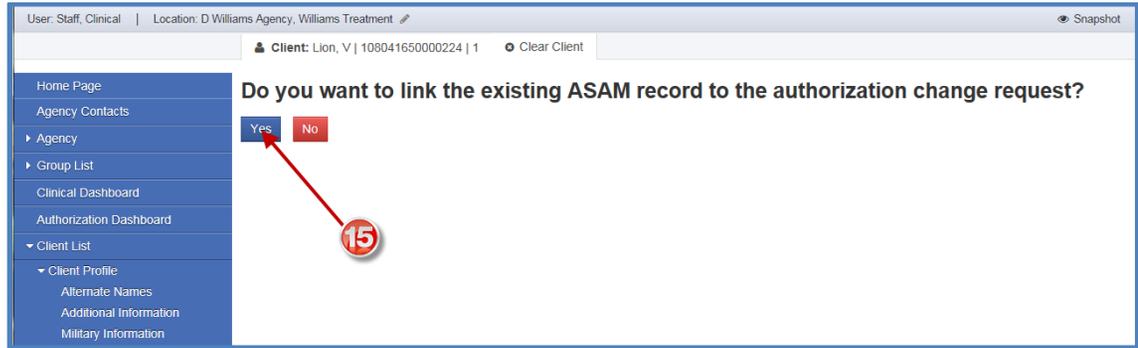
13. Click **Save** and **Finish.**

14. Click **Finish.**

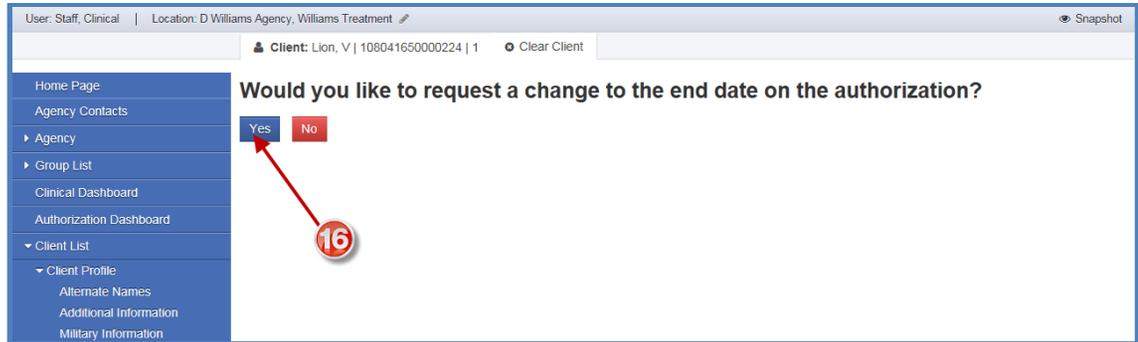
The screenshot shows the ASAM PPC2R form for Client: Lion, V | 10804165000224 | 1. The form is divided into six dimensions, each with a dropdown for 'Level of Care' and a text area for 'Comments'. Red circles with numbers 10 through 13 point to specific fields: 10 points to the 'Update the LOC.' button for Dimension 1; 11 points to the 'Comments' field for Dimension 1; 12 points to the 'Requested Level of Care' and 'Current Level of Care' dropdowns at the bottom; 13 points to the 'Save' and 'Finish' buttons. Red boxes highlight the 'Update the LOC.' buttons and the 'Comments' fields for each dimension, with text boxes next to them containing instructions like 'Update 4/2/15. Enter new ASAM comments for this dimension or indicate No Change.' and 'Enter information at the top of the Comment field with the date.'

The screenshot shows the Authorization Change Request Profile form for Client: Lion, V | 10804165000224 | 1. The form includes fields for Type (Add New Service), Service (Intensive Outpatient), Requested Units (240), End Date, Justification (Client needs this service as pa...), and Requester Comments (LOC change from OP to IOP. New RSS services requested: Case Management 90 units, Drug Testing, 90 units. Client needs case management and therapeutic drug testing while in treatment.). There are also fields for Approver's Comments and Deny Reason. A red circle with the number 14 points to the 'Finish' button. At the bottom, there are 'Cancel', 'Save', and 'Finish' buttons.

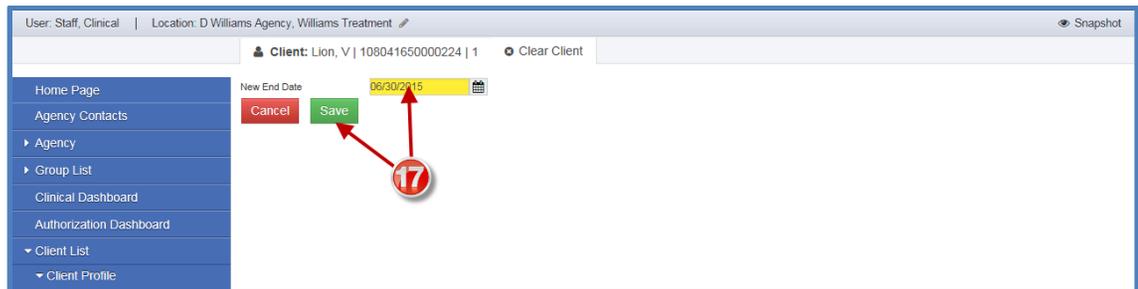
15. Select **Yes** to link the ASAM record with the Authorization Change Request.



16. Select **Yes** to request a change to the end date Authorization.



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



18. 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: DHW Adult | Status: Active  
Plan: State General | Contract: 1 - DHW-D Williams SUD / 7/1/2014 - 6/30/2015 - State  
Authorization #: 2036 | Date Approved: 7/1/2014  
Effective Date: 7/1/2014 | Updated Date: 3/4/2015  
End Date: 6/30/2015 | Updated By: Buskey, Michelle  
ATR Intake: 1/1/0001-

Comments

### Authorization Change Request List

[Add New](#)

Actions	Date	Type	Service	Units	End Date	Status	Justification
	4/2/2015	Add New Service	Intensive Outpatient	240		Pending	Client needs this service as part of the overall treatment plan
	4/2/2015	Change Voucher End Date			6/30/2015	Pending	Client needs this service as part of the overall treatment plan

**18** → [Finish](#)