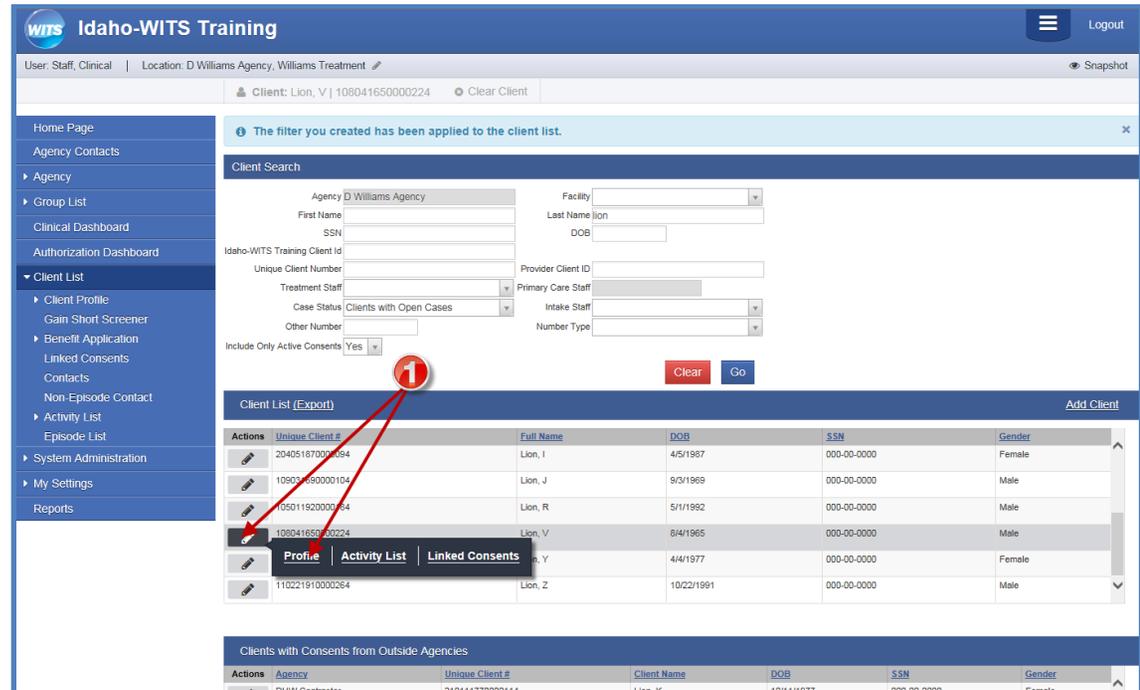


Authorization Change Request – Add New Service for IDHW (non-ATR 4) Clients who are transferring to another facility at my agency

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 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 displays 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, Intake Staff, Other Number, and Number Type. The "Client List (Export)" section is a table with columns for Actions, Unique Client #, Full Name, DOB, SSN, and Gender. The table contains several rows of client data. A red circle with the number 1 is placed over the pencil icon in the Actions column for the client with Unique Client # 10804165000224. A red arrow points from this icon to the "Profile" link in the dropdown menu that appears when the icon is clicked.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	204051870001094	Lion, I	4/5/1987	000-00-0000	Female
	109081960000104	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
	441977	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
	DWILLIAMS	210544372000144	Lion, K	10/14/1977	000-00-0000	Female

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

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

Benefit Application

Linked Consents

Contacts

Non-Episode Contact

Activity List

Episode List

Profile

First Name: [Field]

Middle Name: [Field]

Last Name: Lion

Suffix: [Field]

Gender: Male

DOB: 8/4/1965

SSN: 000-00-0000

Provider Client ID: [Field]

Unique Client Number: 108041650000224

State Client ID: [Field]

Record Created By: Buskey, Michelle

List Updated By: Buskey, Michelle

Created Date: 3/4/2015 1:20 PM

Last Updated Date: 3/4/2015 1:20 PM

Drivers License: [Field]

Acc. Category: [Field]

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

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Episode List

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
Profile		DHW Adult [State General, 1]	Closed	7/1/2014	3/18/2015	\$0.00	\$0.00	\$0.00	\$0.00	3/18/2015

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 'Client List' expanded to show 'Client Profile' and 'Authorization'. The main content area displays authorization details: Group Enrollment (DHW Adult), Plan (State General), Authorization # (2036), Effective Date (7/1/2014), End Date (6/30/2015), Status (Active), Contract 1 (DHW-D Williams SUD / 7/1/2014 - 6/30/2015 - State General-DHW Adult), Date Approved (7/1/2014), Administering Agency (DHW Contractor), Updated Date (3/4/2015 1:21 PM), and Updated By (Buskey, Michelle). Below this is a table of 'Authorized Services List' with columns for Service, Authorized Units, Authorization Amt, Encumbered, Expended, and Available Units. The table shows two rows: 'Outpatient' (25 units, \$231.00) and 'Drug/Alcohol Testing' (25 units, \$337.50). A summary table on the right shows 'Total Authorized: \$568.50', 'Total Encumbered: \$0.00', 'Total Expended: \$0.00', and 'Total Available: \$568.50'. At the bottom, an 'Actions' box contains 'Close' and 'Requests' links, with a red arrow and a circled '4' pointing to 'Requests'. A 'Finish' button is also present.

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

The screenshot shows the 'Provider Authorization Change Request' page for the same client. The left sidebar is identical to the previous screenshot. The main content area displays the same authorization details as above. Below the details is a table titled 'Authorization Change Request List' with columns for Actions, Date, Type, Service, Units, End Date, Status, and Justification. The table is currently empty. A red arrow and a circled '5' point to the 'Add New' link in the top right corner of the table area. A 'Finish' button is located at the bottom right.

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

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 a different facility at my agency:** Specify the new 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.

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.**

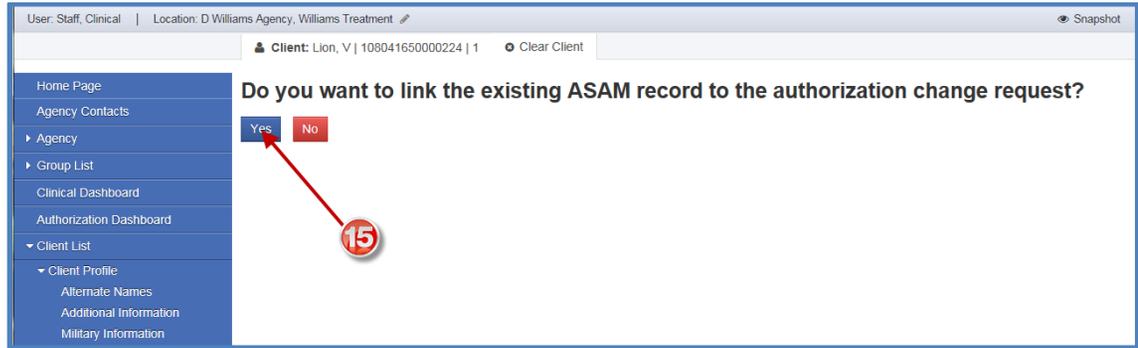
13. Click **Save** and **Finish.**

14. Click **Finish.**

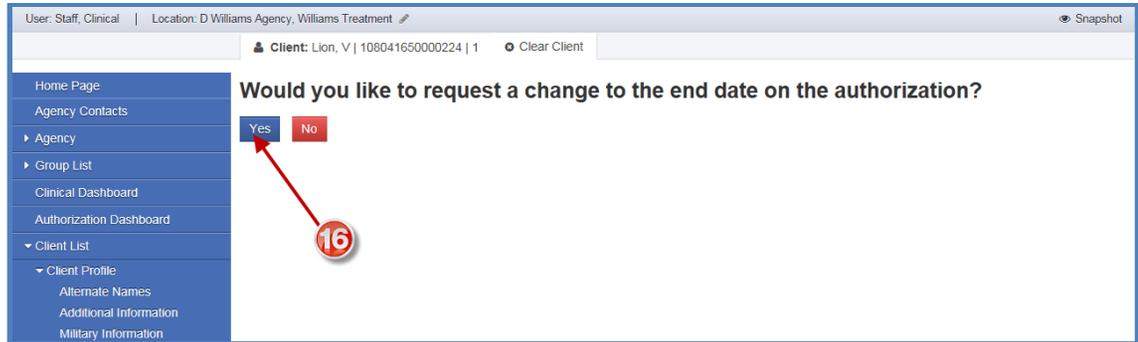
The screenshot shows the ASAM PPC2R form for Client: Lion, V | 10804165000224 | 1. The form is divided into six dimensions, each with a dropdown for 'Level of Care' and a text field for 'Comments'. Red circles with numbers 10 through 13 point to specific fields: 10 points to the 'Update the LOC.' dropdown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

The screenshot shows the Authorization Change Request Profile form for Client: Lion, V | 10804165000224. 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 Requestor Comments (Client will be transferring to the Boise facility for my agency. 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, Deny Reason, and Other Description. A red circle with the number 14 points to the 'Finish' button. At the bottom, there are 'Cancel', 'Save', and 'Finish' buttons.

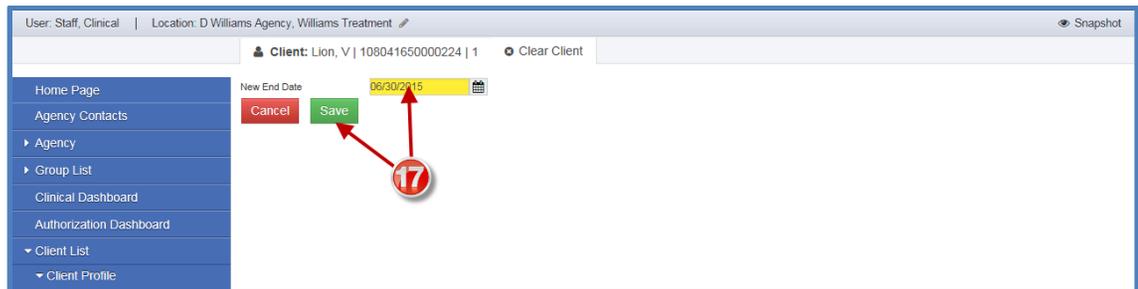
15. Select **Yes** to link the ASAM record with the Authorization Change Request.



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

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Client Group Enrollment
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Allergies
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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](#)