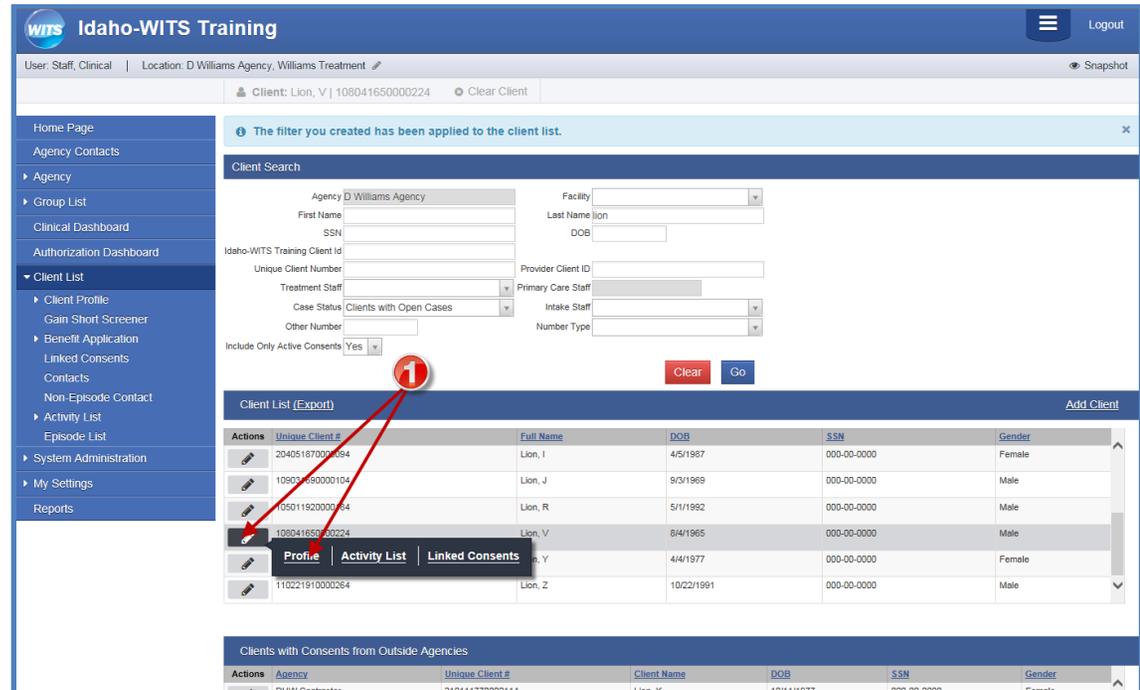


# Authorization Change Request – Change to Service for IDHW (non-ATR 4) & IDOC Clients who are not changing facilities or agencies

These instructions are to be used in the following Situations.

- Request additional treatment units for the **IDHW** client at the current treatment Level of Care (LOC) at the current facility at my agency.
- Transfer an **IDOC** client from one Stage (including Assessment or Pretreatment) to another Stage 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 shows the Idaho-WITS Training interface. 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". The client being viewed is "Lion, V | 10804165000224".

The left navigation pane is expanded to "Client List", which includes sub-items like "Client Profile", "Gain Short Screener", "Benefit Application", "Linked Consents", "Contacts", "Non-Episode Contact", "Activity List", "Episode List", "System Administration", and "My Settings".

The main content area shows a "Client Search" form with various filters. A message at the top states: "The filter you created has been applied to the client list." Below the search form is a table titled "Client List (Export)" 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 tooltip is visible over this row, showing options: "Profile", "Activity List", and "Linked Consents".

Below the main table is a section titled "Clients with Consents from Outside Agencies" with a similar table structure.

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

The screenshot shows the 'Client Profile' page for a client named 'Lion, V'. The left navigation pane has 'Authorization' highlighted with a red circle and a red arrow pointing to it. A red circle with the number '2' is also placed over the 'Authorization' link in the navigation pane. The main content area shows the client's profile information, including first name, middle name, last name, gender, DOB, SSN, and driver's license. Below the profile information is an 'Administrative Actions' section with 'Cancel', 'Save', and 'Finish' buttons. At the bottom, there are sections for 'Alternate Names' and 'Addresses'.

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

The screenshot shows the 'Authorization List' page. The left navigation pane has 'Authorization' highlighted with a red circle and a red arrow pointing to it. A red circle with the number '3' is placed over the 'Profile' button in the 'Actions' column of the first row of the table. The table has columns for 'Auth #', 'Payor', 'Status', 'Effective Date', 'End Date', 'Authorized', 'Encumbered', 'Expended', 'Available', and 'Last Activity Date'. The first row shows an active authorization for 'DHW Adult [State General, 1]' with an authorized amount of \$568.50.

| Actions  | Auth # | Payor                        | Status | Effective Date | End Date  | Authorized | Encumbered | Expended | Available | Last Activity Date |
|--|--------|------------------------------|--------|----------------|-----------|------------|------------|----------|-----------|--------------------|
|  Profile  | 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 Client Lion, V. The left sidebar contains navigation options like 'Home Page', 'Agency Contacts', 'Agency', 'Group List', 'Clinical Dashboard', 'Authorization Dashboard', 'Client List', and 'Client Profile'. The main content area displays authorization details for 'Group Enrollment DHW Adult' and 'Plan State General'. Below this is a table for 'Authorized Services List' with columns for Service, Authorized Units, Authorization Amt, Encumbered, Expended, and Available Units. At the bottom, there is an 'Actions' section with a 'Requests' button highlighted by a red circle with the number 4.

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

The screenshot shows the 'Provider Authorization Change Request' page. It features a sidebar similar to the previous page. The main content area displays details for a 'Provider Authorization Change Request' for Client Lion, V. Below the details is an 'Authorization Change Request List' table with columns for Actions, Date, Type, Service, Units, End Date, Status, and Justification. A red circle with the number 5 points to the 'Add New' button located at the top right of this table.

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

The screenshot shows the 'Authorization Change Request Profile' page. The sidebar is consistent with the previous pages. The main content area contains a form for the request profile, including fields for Type, Service, Units, End Date, Justification, Requestor Comments, Approver's Comments, and Deny Reason. A red circle with the number 6 points to the 'Type' dropdown menu, which has 'Change to Service' selected. Below the form is an 'Actions' section with a button labeled 'Add ASAM Consent Review'. At the bottom right, there are 'Cancel', 'Save', and 'Finish' buttons.

7. Select the **Service** (the current treatment LOC), enter the **Number of Requested Units**, and select the **Justification Reason**.
  - Enter Zero units for an IDOC client who is changing stages.
  
8. **Comments.**
  - Request additional treatment units for the **IDHW** 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
  - Transfer an **IDOC** client from one Stage (including Assessment or Pretreatment) to another Stage at the current facility at my agency. Indicate the new treatment LOC and the name of the Stage.
  
9. Click **Add ASAM Concurrent Review**.

The screenshot shows a web application interface for an "Authorization Change Request Profile". The top navigation bar includes "User: Staff, Clinical" and "Location: D Williams Agency, Williams Treatment". Below this, the client information is "Client: Lion, V | 10804165000224" with a "Clear Client" button. A left-hand navigation menu lists various options like "Home Page", "Agency Contacts", "Client Profile", etc. The main form area contains the following fields:

- Type:** A dropdown menu set to "Change to Service".
- Service:** A dropdown menu set to "Outpatient".
- Additional Units:** A text input field containing "240".
- End Date:** A date selection field.
- Justification:** A text area containing "Client will continue treatment p...".
- Requestor Comments:** A text area with a placeholder: "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." This field is highlighted with a yellow background and a red callout circle labeled "8".
- Approver's Comments:** A text area.
- Deny Reason:** A text area.
- Other Description:** A text area.
- Actions:** A section containing a button labeled "Add ASAM Concurrent Review", which is highlighted with a red callout circle labeled "9".

At the bottom right of the form are three buttons: "Cancel" (red), "Save" (green), and "Finish" (blue). A red callout circle labeled "7" points to the "Service" dropdown menu.

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.**

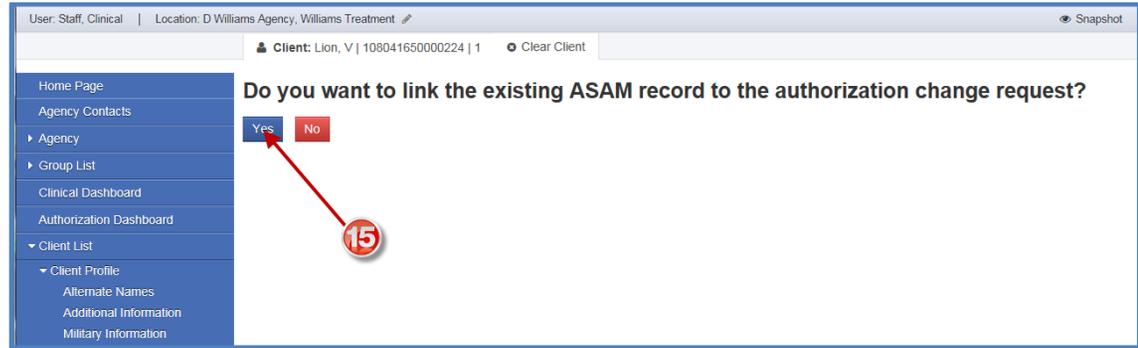
13. Click **Save** and **Finish.**

14. Click **Finish.**

This 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' (set to '1.0 Outpatient') and a 'Comments' field. Annotations 10-13 point to the 'Update the LOC.' dropdowns, the 'Update 4/2/15. Enter new ASAM comments for this dimension or indicate No Change.' text, and the 'Comments' fields respectively. At the bottom, there are fields for 'Requested Level of Care' and 'Current Level of Care' (both set to '1.0 Outpatient'), a 'Critical Override' dropdown, and 'Cancel', 'Save', and 'Finish' buttons. A 'Review Date' of 4/2/2015 is also visible.

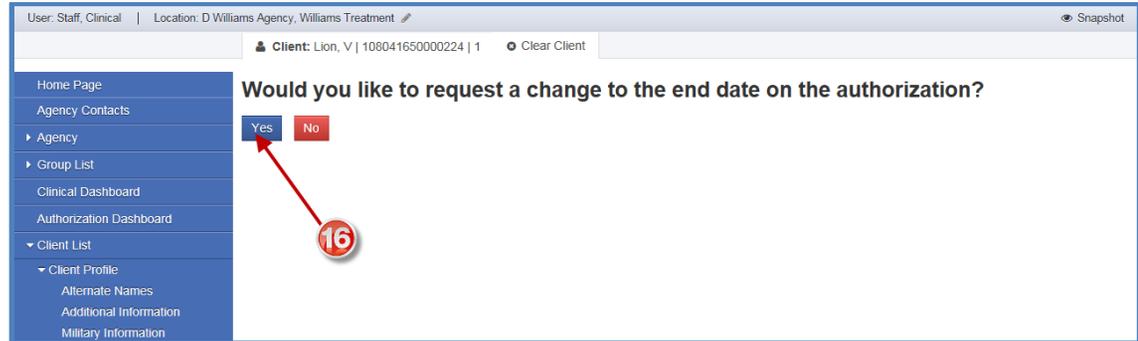
This screenshot shows the 'Authorization Change Request Profile' form for Client: Lion, V | 10804165000224. The form includes fields for 'Type' (Change to Service), 'Service' (Outpatient), 'Additional Units' (240), and 'End Date'. The 'Justification' field contains the text 'Client will continue treatment p...'. The 'Requestor Comments' field contains the text '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'. There are also fields for 'Approver's Comments' and 'Deny Reason'. At the bottom, there is an 'Actions' section with a link 'Add ASAM Concurrent Review' and 'Cancel', 'Save', and 'Finish' buttons. Annotation 14 points to the 'Finish' button.

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

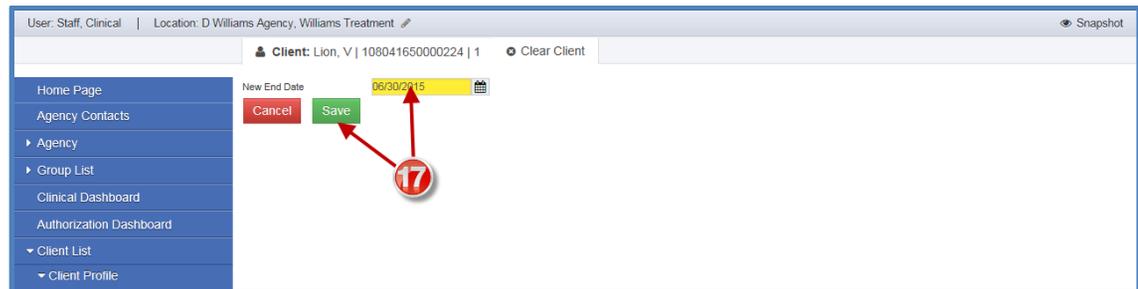


16. Select **Yes** to request a change to the end date Authorization.

- **For an IDOC client, select NO.** IDOC authorization date spans are specific in each stage. A Change to Voucher End Date request that accompanies an Authorization Change Request for an IDOC client will be denied and the allowed authorization date span will be used.



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 | 10804165000224 | 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  |
|---------|-----------|-------------------------|------------|-------|-----------|----------|--|
|         | 2/12/2015 | Change to Service       | Outpatient | 0     |           | Approved | See comments.  |
|         | 2/17/2015 | Change to Service       | Outpatient | 1     |           | Denied   | See comments.  |
|         | 2/17/2015 | Change to Service       | Outpatient | 0     |           | Approved | See comments.  |
|         | 4/2/2015  | Change to Service       | Outpatient | 240   |           | Pending  | Client will continue treatment past authorization close date |
|         | 4/2/2015  | Change Voucher End Date |            |       | 5/01/2015 | Pending  | Client will continue treatment past authorization close date |

18

Finish