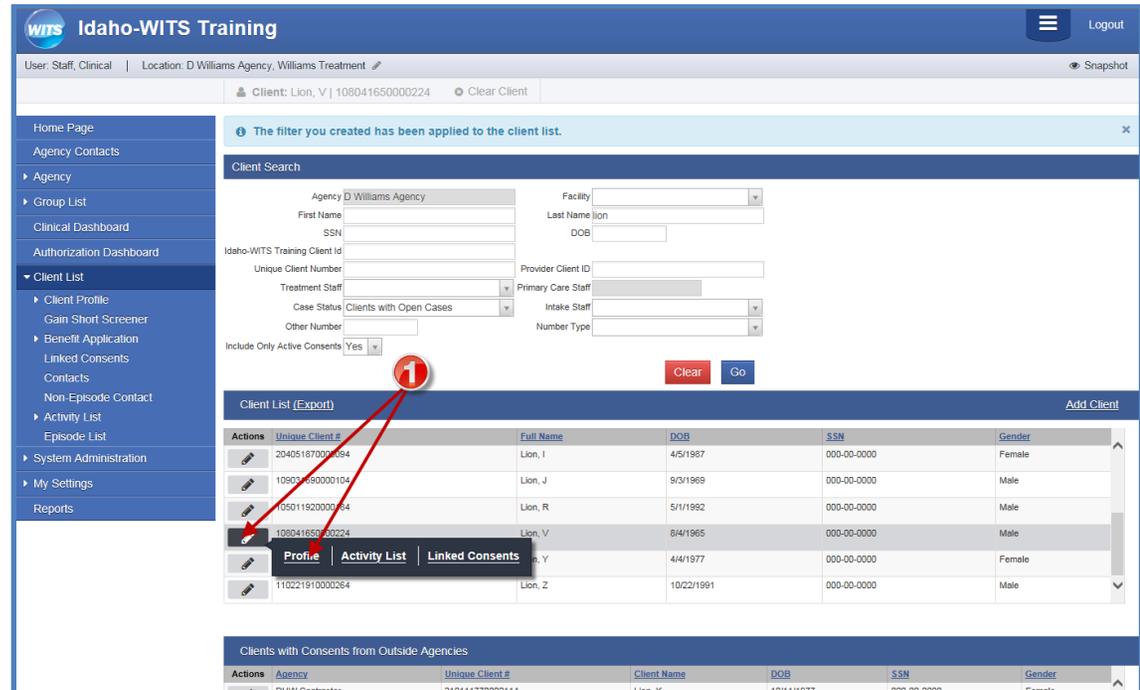


# Authorization Change Request – Change to Service for IDHW (non-ATR 4) & IDOC Clients who are Transferring to Another Agency

These instructions are to be used in the following Situations.

- Transfer a client at the same Level of Care (LOC) or Stage to a different treatment provider and there are two weeks (14 days) or less before the authorization expires.
- Transfer a client to a different treatment provider and from one LOC to a different LOC or from one Stage (including Assessment or Pretreatment) to another Stage.

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 navigation pane on the left includes 'Client List' and 'Client Profile'. The main area displays a 'Client Search' form with various filters and a 'Client List (Export)' table. A red circle with the number '1' is placed over the pencil icon in the 'Actions' column of the table, with a red arrow pointing to the 'Client Profile' link in the dropdown menu for the client with Unique Client # 10804165000224.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	204051870001394	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
		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

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

Last Updated By: Buskey, Michelle

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

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

Driver's License: [Field]

Ac. Category: [Field]

Has paper file: Yes

Administrative Actions: [Field]

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

Home Page

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Agency

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Contacts

Non-Episode Contact

Activity List

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

Add New Authorization Record

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

The screenshot shows the 'Authorization' page for Client Lion, V. The left sidebar contains a navigation menu with 'Client Profile' expanded. The main content area displays authorization details for 'Group Enrollment DHW Adult' and 'Plan State General'. Below this is a table of '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. The left sidebar is the same as in the previous screenshot. The main content area displays details for a 'Provider Authorization Change Request'. Below this is a table titled 'Authorization Change Request List' with columns for Actions, Date, Type, Service, Units, End Date, Status, and Justification. The 'Add New' button at the end of the table is highlighted by a red circle with the number 5.

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

The screenshot shows the 'Authorization Change Request Profile' page. The left sidebar is the same. The main content area displays a form for the 'Authorization Change Request Profile'. The 'Type' field is highlighted in yellow, and a red circle with the number 6 points to it. A text box next to it says 'Select the Type of Change to Service'. At the bottom, there is an 'Actions' section with a dropdown menu showing 'Add ASAM Consent Review' and buttons for 'Cancel', 'Save', and 'Finish'.

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.**

- **Transfer a client at the same Level of Care (LOC) or Stage to a different treatment provider and there are two weeks (14 days) or less before the authorization expires:** Specify the new agency and enter a 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 a client to a different treatment provider and from one LOC to a different LOC or from one Stage (including Assessment or Pretreatment) to another Stage:** Specify the new agency, note the current level of care (LOC) and the requested LOC or Stage. 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**.

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 | 108041650000224". A left-hand menu contains various options like "Home Page", "Agency Contacts", "Agency", "Group List", "Clinical Dashboard", "Authorization Dashboard", and "Client List". The main form area is titled "Authorization Change Request Profile" and contains several fields: "Type" (set to "Change to Service"), "Service" (set to "Outpatient"), "Additional Units" (set to "30"), "End Date", "Justification" (with a dropdown menu), "Requestor Comments" (with a text area containing "Client will be transferring to the Another Treatment Provider. Enter justification for additional units/different LOC. New RSS services requested: Case Management 90 units, Drug Testing 90 units. Client needs case management and therapeutic drug testing while in treatment."), "Approver's Comments", "Deny Reason", and "Other Description". At the bottom, there is an "Actions" section with a button labeled "Add ASAM Concurrent Review". Three red callout boxes with numbers 7, 8, and 9 are overlaid on the form. Callout 7 points to the "Additional Units" field. Callout 8 points to the "Justification" dropdown menu. Callout 9 points to the "Add ASAM Concurrent Review" button. At the bottom right of the form, there are three buttons: "Cancel", "Save", and "Finish".

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**.

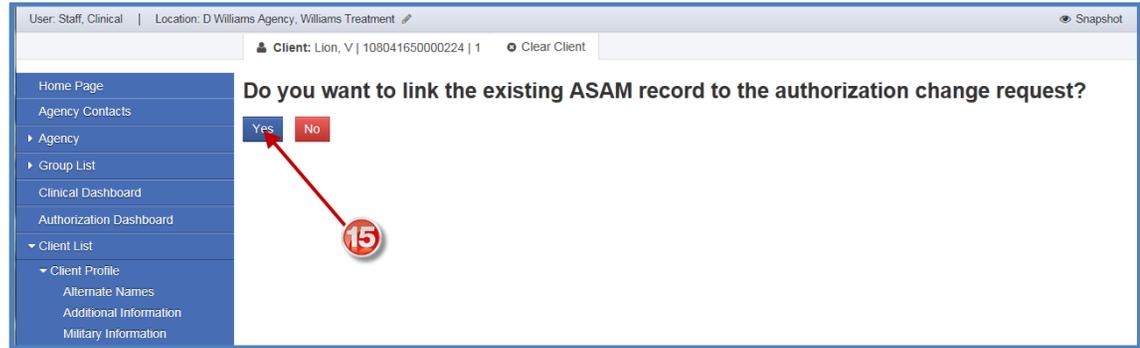
13. Click **Save** and **Finish**.

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' (all set to 'I.0 Outpatient') and a 'Comments' field. Annotations include:  
- Step 10: 'Update the LOC.' pointing to the Level of Care dropdown for Dimension 1.  
- Step 11: 'Update 4/2/15. Enter new ASAM comments for this dimension or indicate No Change.' pointing to the top of the comment field for Dimension 1.  
- Step 12: 'Update 4/2/15. Enter new ASAM comments for this dimension or indicate No Change.' pointing to the top of the comment field for Dimension 2.  
- Step 13: 'Update 4/2/15. Enter new ASAM comments for this dimension or indicate No Change.' pointing to the top of the comment field for Dimension 3.  
- Step 13: 'Update 4/2/15. Enter new ASAM comments for this dimension or indicate No Change.' pointing to the top of the comment field for Dimension 4.  
- Step 13: 'Update 4/2/15. Enter new ASAM comments for this dimension or indicate No Change.' pointing to the top of the comment field for Dimension 5.  
- Step 13: 'Update 4/2/15. Enter new ASAM comments for this dimension or indicate No Change.' pointing to the top of the comment field for Dimension 6.  
At the bottom, there are dropdowns for 'Requested Level of Care' and 'Current Level of Care' (both set to 'I.0 Outpatient'), a 'Critical Override' dropdown, and buttons for 'Cancel', 'Save', and 'Finish'. A 'Review Date' of 4/2/2015 is also visible.

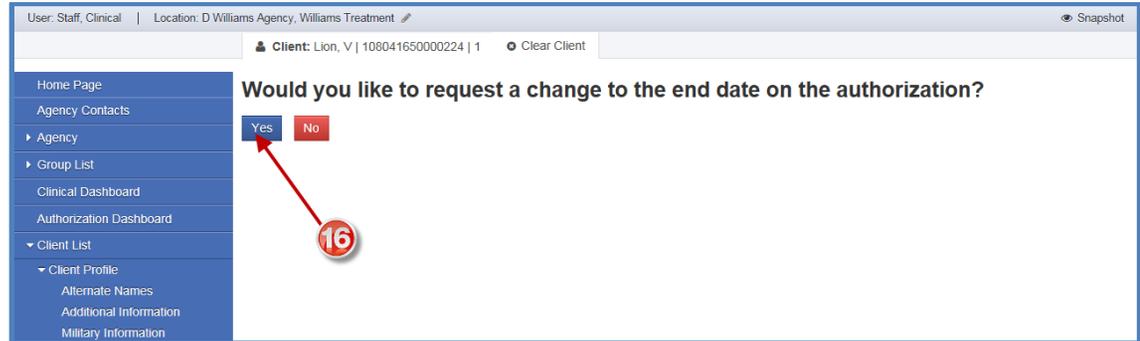
The screenshot shows the Authorization Change Request Profile form for Client: Lion, V | 10804165000224. The form includes fields for:  
- Type: Change to Service  
- Service: Outpatient  
- Additional Units: 30  
- End Date: [blank]  
- Justification: Client will continue treatment p...  
- Requestor Comments: Client will be transferring to the Another Treatment Provider. Enter justification for additional units/different LOC. New RSS services requested: Case Management 90 units, Drug Testing 90 units. Client needs case management and therapeutic drug testing while in treatment.  
- Approver's Comments: [blank]  
- Deny Reason: [blank] Other Description: [blank]  
At the bottom, there is an 'Actions' section with a link 'Add ASAM Concurrent Review' and buttons for 'Cancel', 'Save', and 'Finish'. A red circle with the number 14 points to the 'Finish' button.

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

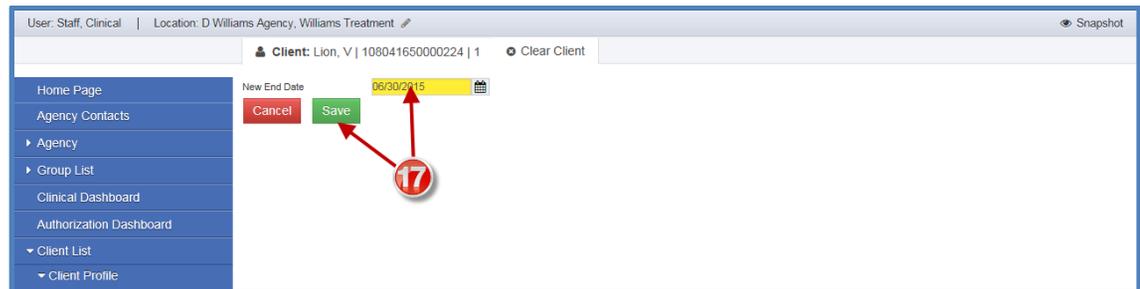


16. Select **Yes** to request a change to the end date Authorization.

- **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 | 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
	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

Finish

19. Close the Program Enrollment and complete the Discharge (select the discharge reason of Transferred).