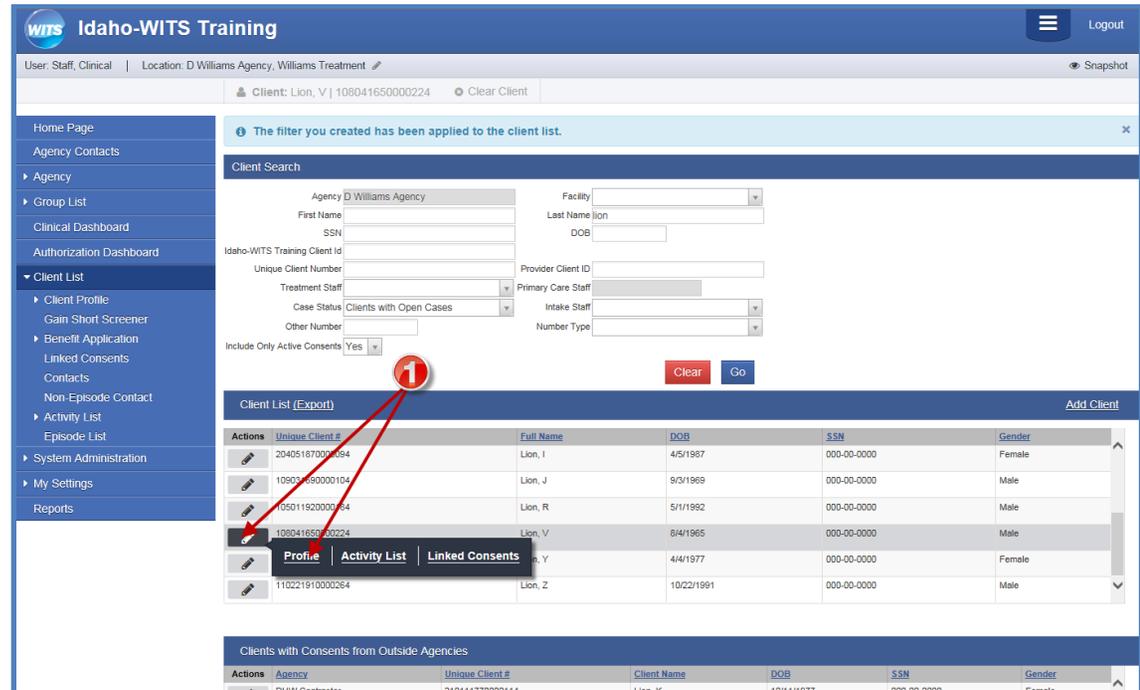


Authorization Change Request – Note to Authorizer for IDHW (non-ATR 4) & IDOC Clients who are transferring to another facility at my agency

These instructions are to be used in the following Situations.

- Transfer an IDHW client from Assessment to a treatment Level of Care (LOC) at different facility at my agency.
- Transfer an ***IDHW*** client to a different facility at my agency at the same Level of Care (LOC) and there are more than two weeks (15+ days) before the treatment authorization expires.
- I am a Stand Alone RSS provider and I want to transfer a client from one facility to another 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 left navigation pane shows 'Client List' selected. The main content area is the 'Client Search' screen, which includes a search form with fields for Agency, Facility, First Name, Last Name, SSN, and DOB. Below the search form is a table titled 'Client List (Export)' with columns for Actions, Unique Client #, Full Name, DOB, SSN, and Gender. A red circle with the number '1' is placed over the 'Profile' button in the table. A tooltip is visible over the 'Profile' button, showing 'Profile', 'Activity List', and 'Linked Consents' options. The table lists several clients, including one 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 |
| | | Lion, 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

List 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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Other Numbers

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Authorization

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Linked Consents

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 |
|---------|--------|------------------------------|--------|----------------|-----------|------------|------------|----------|-----------|--------------------|
| 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 |
| | | 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 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', 'Authorization #', 'Effective Date', 'End Date', 'Status', 'Contract', 'Date Approved', '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 a 'Close' button and a 'Requests' link. A red arrow with the number '4' points to the 'Requests' link. To the right of the 'Authorized Services List' table, there is a summary of totals: 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 this section.

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', 'Authorization #', 'Effective Date', 'End Date', 'Status', 'Contract', 'Date Approved', '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 'Authorization Change Request List' table, there is an 'Add New' link and a 'Finish' button. A red arrow with the number '5' points to the 'Add New' link.

6. The Authorization Change Request List displays. Select **Note to Authorizer**.

7. Enter **Comments**.

- **Transfer an IDHW client from Assessment to a treatment Level of Care (LOC) at different facility at my agency:** specify the new facility, document the date the GRRS is consented to DHW Contractor, and include the recommended LOC.
- **Transfer an IDHW client to a different facility at my agency at the same Level of Care (LOC) and there are more than two weeks (15+ days) before the treatment authorization expires:** specify the new facility, enter justification for additional RSS Services if applicable. Include the name of the Stand Alone RSS provider if applicable.
- **I am a Stand Alone RSS provider and I want to transfer a client from one facility to another facility at my agency:** specify the new facility, enter justification for additional RSS Services if applicable.

8. Click **Save** and **Finish**.

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

Client: Lion, V | 108041650000224 | Clear Client

Home Page
Agency Contacts
Agency
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Authorization Dashboard
Client List
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Additional Information
Military Information
Contact Info
Collateral/Cust. Contacts
Other Numbers
History
Client Group Enrollment
Authorization
Employment
Allergies

Authorization Change Request Profile

Type: [Dropdown menu highlighted in yellow]

Service: [Field]

Units: [Field]

End Date: [Field]

Justification: [Field]

Requestor Comments: [Field]

Approver's Comments: [Field]

Deny Reason: [Field] Other Description: [Field]

Actions: [Field]
[Add ASAM Concurrent Review](#)

Cancel Save Finish

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

Client: Lion, V | 108041650000224 | Clear Client

Home Page
Agency Contacts
Agency
Group List
Clinical Dashboard
Authorization Dashboard
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Client Profile
Alternate Names
Additional Information
Military Information
Contact Info
Collateral/Cust. Contacts
Other Numbers
History
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Authorization
Employment
Allergies

Authorization Change Request Profile

Type: Note to Authorizer

Service: [Field]

Units: [Field]

End Date: [Field]

Justification: [Field]

Requestor Comments: [Field highlighted in yellow]

Approver's Comments: [Field]

Deny Reason: [Field] Other Description: [Field]

Actions: [Field]
[Add ASAM Concurrent Review](#)

Cancel Save Finish