

Creating a Provisional Voucher

These instructions are to be used when a consent and referral has already been created for the 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, select **Activity List**.
2. **Review** the Referral of the agency you are creating a provisional voucher for.

Idaho-WITS Training

User: Buskay, Michelle
Loc: D Williams Agency, Williams Treatment
Client: Morning, Thursday | 21010187389320H | Case #: 1

October 2013, Rev 3

Printable View

Logout

Home Page
Agency
Group List
Clinical Dashboard
Client List
Client Profile
Gain Short Screener
Eligibility Screener
Benefit Application
Linked Consents
Non-Episode Contact
Activity List
Episode List
System Administration
My Settings
Reports
Support Ticket

Client Search

Agency: D Williams Agency

Facility: [Dropdown]

First Name: [Text] Last Name: [Text]

SSN: [Text] DOB: [Text]

Idaho-WITS Training Client Id: [Text]

Unique Client Number: [Text]

Treatment Staff: [Dropdown]

Case Status: All Clients

Other Number: [Text]

Provider Client ID: [Text]

Primary Care Staff: [Text]

Intake Staff: [Dropdown]

Number Type: [Dropdown]

Include Only Active Consents: Yes

Clear Go

Client List (Export) Add Client

Unique Client #	Full Name	DOB	SSN	Gender	Actions
21010187389320H	Morning, Thursday	10/10/1987	389-92-3893	Female	Profile Activity List Delete Record Linked Consents

Clients with Consents from Outside Agencies

Agency	Unique Client #	Client Name	DOB	SSN	Gender	Actions
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Idaho-WITS Training

User: Station, Crystal
Loc: D Williams Agency, Williams Treatment
Client: Morning, Thursday | 21010187389320H | Case #: 1

October 2013, Rev 3

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Activity List
Intake
Vital Signs
Fax Determination
Drug Testing
Wait List

Client Activity List

Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	11/7/2013	11/7/2013	Completed	Review
Intake Transaction	11/7/2013	11/7/2013	Completed	Review
CPRA Interview (Intake)	11/7/2013	11/7/2013	Completed	Review
Consent (RSS Stand Alone)	11/7/2013	11/22/2013	Completed	Review
Consent (RSS Stand Alone)	11/7/2013	3/13/2014	Completed	Review
Referral (RSS Stand Alone)	11/22/2013	11/25/2013	Completed	Review

3. Select **Authorizations** on the Navigation Pane under Referral.

4. Select **Add New Authorization Record**.

WITS Idaho-WITS Training

User: Bastin, Crystal
 Loc: D Williams Agency, Williams Treatment
 Client: Morning, Thursday | 21010167389320H | Case #: 1

Printable View

Client Referral for Morning, Thursday

Referred By

Agency: D Williams Agency
 Facility: Williams Treatment
 Staff Member: Buskey, Michelle
 Program: Williams Treatment/ATR 3 : 1/11/2011 -
 State Reporting Category:
 Reason: Service not available at this facility
 If Other:
 Is Consent Verification Required? Yes
 Is Consent Verified? Yes
 Continue This Episode of Care? No

Referred To

Signed Consents: RSS Stand Alone
 Agency: RSS Stand Alone
 Facility: RSS Stand Alone - Boise
 Staff Member:
 Program: ATR 3
 State Reporting Category:
 Non-System Agency:
 Non-System Modality:
 Non-System Specifier:
 Appt Date: Undetermined

Consents Granted
 Consent Date: 11/7/2013
 Disclosure Domains:
 Client Information (Profile) (UD, +365)
 Consent (UD, +365)
 Intake Transaction (UD, +365)

Comments

Referral Status: Referral Created/Pending
 Referral Date: 11/22/2013
 Projected End Date:
 Created Date: 11/25/2013 10:00 PM

Buttons: Cancel Save Finish

Auth #	Payor	Status	Effective Date	End Date	Encumbered	Expended	Available	Last Activity Date	Actions
1678		Provisional	11/22/2013	1/15/2014		0.00	0.00	0.00 11/25/2013	Profile
1690		Provisional	12/9/2013	1/28/2014		0.00	0.00	50.00 12/6/2013	Profile

Buttons: Add New Authorization Record

5. Update the Date Approved and the Effective Date if necessary. **These dates MUST NOT predate the Referral Date.**

6. Enter the End Date.

7. Select Save.

8. Select Add Service.

Authorization for Morning, Thursday

Group Enrollment: [text] Status: Pending
Plan: ATR 3 Contract: 1 - DHW-RSS Stand Alone (ATR) / 7/1/2012 - 6/30/2014
Authorization #: [text] Date Approved: 11/22/13
Administering Agency: D Williams Agency Updated Date: [text]
Effective Date: 11/22/2013 Updated By: [text]
End Date: 1/15/14

Comments: [text area]

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Amount	Available Units	Actions

Actions: [text box]

7

Total Authorized: 0.0
Total Encumbered: 0.0
Total Expended: 0.0
Total Available: 0.0

Cancel Save Finish

Authorization for Morning, Thursday

Group Enrollment: [text] Status: Pending
Plan: ATR 3 Contract: 1 - DHW-RSS Stand Alone (ATR) / 7/1/2012 - 6/30/2014
Authorization #: [text] Date Approved: 11/22/13
Administering Agency: D Williams Agency Updated Date: [text]
Effective Date: 11/22/2013 Updated By: [text]
End Date: 1/15/14

Comments: [text area]

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Amount	Available Units	Actions

Actions: [text box]

8

Total Authorized: 0.0
Total Encumbered: 0.0
Total Expended: 0.0
Total Available: 0.0

Cancel Save Finish

9. Select the **Service** (the # of Authorized Units will populate based on the service that is selected.)

10. Select **Finish**.

11. Repeat steps 7 and 8 for any additional services that are needed.

12. Select **Finish**.

Authorized Services for Morning, Thursday

Service: 

Authorization #:

Authorized Units: 



Authorization for Morning, Thursday

Group Enrollment: Status:

Plan: Contract:

Authorization #: Date Approved: 

Administering Agency: Updated Date:

Effective Date: Updated By:

End Date:

Comments:

Authorized Services List [Add Service](#)

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Amount	Available Units	Actions
Case Management (basic and intensive)	1	\$12.40	\$0.00	\$0.00	\$12.40	1.00	Edit Delete

Total Authorized: 

Total Encumbered:

Total Expended:

Total Available: