

Tracking Benefit Caps

Using Authorizations

Create the Authorization

The purpose of this instruction is to provide a method to track benefit caps per client.

1. **Getting here:** Login, select the **Facility**, select **Client List** on the Navigation Pane (left menu), and search for your client. Select **Client Profile**.

NOTE: This instruction assumes the client record already exists and a Client Group Enrollment for private or self-pay already exists.

2. Select **Authorization** on the Navigation Pane (left menu).
3. Click **Add New Authorization Record**.

17.7.2 Idaho-WITS Training

User: Trainee8, Treatment | Location: Provider Training Agency, Treatment Location 1 | Generate Report | Snapshot

Client: Pay, Private | 10901186000016R | 1 | Clear Client

Profile

First Name: Poude | Middle Name: | Last Name: Pay | Gender: Male | DOB: 5/1/1995 | SSN: 000-00-0000

Provider Client ID: | Unique Client Number: 10901186000016R | State Client ID: | Record Created By: Williams, Denise | Last Updated By: Williams, Denise | Created Date: 11/12/2014 2:49 PM | Last Updated Date: 11/12/2014 2:52 PM

Driver's License: | Access Category: | 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	123	No	11/12/2014	11/12/2014

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Authorization List

Actions	Auth #	Payer	Status	Effective Date	End Date	Authorized	Encumbered	Expended	Available	Last Activity Date
	2194	DHW Adult [State General, 5]	Active	11/12/2014	6/30/2015	\$4,620.00	\$0.00	\$0.00	\$4,620.00	11/12/2014

Add New Authorization Record

4. Enter Authorization # and End Date.

5. Click Save.

6. Click Add Service.

7. Choose Service and # Authorized Units.

NOTE: The Authorization will not stop your agency from billing over the authorization amount but it allows an agency to track how much is billed against a benefit cap to avoid exceeding the cap.

The screenshot shows the 'Authorization' form. At the top, there are dropdown menus for 'Group Enrollment' and 'Plan', both set to 'Blue Shield of ID (Regence), PO Bo...'. The 'Status' is 'Active'. The 'Authorization #' is '1'. The 'Date Approved' is '10/28/2014'. The 'End Date' is '06/30/2015'. A red circle with the number '4' has arrows pointing to the 'Authorization #' and 'End Date' fields. Below the form is an 'Authorized Services List' table with columns: Actions, Service, Authorized Units, Encumbered, Expended, Available Units. A red circle with the number '5' has an arrow pointing to the 'Add Service' button. A red circle with the number '6' has an arrow pointing to the 'Add Service' button. At the bottom right, there are buttons for 'Cancel', 'Save', and 'Finish'.

The screenshot shows the 'Authorized Services' form. The 'Service' dropdown is set to '(H0004) Individual Counseling - Substance Abuse'. The 'Authorization #' is '1'. The '# Authorized Units' is '450'. The '# Used Units' is '0'. A red circle with the number '7' has arrows pointing to the '# Authorized Units' and 'Service' fields. At the bottom, there are buttons for 'Cancel', 'Save', and 'Finish'.

