

# Creating a Consent, Referral, and Provisional Voucher

These instructions will be used by treatment providers for ONLY ATR clients to create a Provisional Voucher for another agency.

Prior to starting this process, please review the **Authorization Change Requests & Provisional Vouchers - Overview** to determine if you need to complete an Authorization Change Request in addition to the Provisional Voucher.

## Create the Consent

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**.

**NOTE: The Intake Activity Date will be used as the Earliest Date of Consented Activities on the Consent.**

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

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

Agency	Unique Client #	Client Name	DOB	SSN	Gender	Actions
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Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	11/7/2013	11/7/2013	Completed	<a href="#">Review</a>
Intake Transaction	11/7/2013	11/7/2013	Completed	<a href="#">Review</a>
GPRA Interview (Intake)	11/7/2013	11/7/2013	Completed	<a href="#">Review</a>

3. Click **Add New Client Consent Record**.

4. Select the **Disclosed to Agency** and enter the **Purpose for disclosure**.

5. Enter the **Intake Date as the Earliest date of services to be consented**.

6. Click **Save**.

**NOTE: Click Print General Consent if you want to use the Release of Information generated from WITS.**

Client Consent List							<a href="#">Add New Client Consent Record</a>
Start Date	Disclosed To	Status	Signed?	Created Date	Revocation Date	Actions	

**Client Disclosure Agreement**

Note: Consented information may not be redisclosed.

Client Name: Morning, Thursday  
Unique Client Number: 21010187389320H  
Disclosed From Agency: D Williams Agency

Entities with Disclosure Agreements: All Other Agencies

System Agency: Yes

Disclosed To Agency: RSS Stand Alone

Disclosed To Entity (Non System Agency):

Purpose for disclosure: Provisional Voucher

Earliest date of services to be consented: 11/7/2013

Has the client signed the paper agreement form: No

Client Information Options:

- Admission
- CAFAS® Assessment
- CALOCUS Assessment
- Client Eligibility
- Court Monitoring Form
- Discharge
- Discharge/Continuing Care Planni
- Dispensary Order Detail
- Drug Test Results
- ECourt Admission
- ECourt Case Management

Consent Expires Upon:

- Discharge(UD) +Days
- Date Signed(DS) +Days
- Other Event(OE) Exp
- Crim Just Cond (CJC) Exp

Disclosure Selection:

- Client Information (Profile) (UD, +365)
- Consent (UD, +365)
- Intake Transaction (UD, +365)

Comments:

Other Disclosures:

Buttons: Cancel Save Finish

7. Select **Yes** after the client has signed the Release of Information.
  
8. The Date client signed consent will default to today's date. Update as necessary.
  
9. Click **Save**.

### Client Disclosure Agreement

**Note: Consented information may not be redisclosed.**

Client Name: Morning, Thursday  
 Unique Client Number: 21010187389320H  
 Disclosed From Agency: D Williams Agency

Entities with Disclosure Agreements: [Dropdown] **7**

System Agency: Yes

Disclosed To Agency: RSS Stand Alone

Disclosed To Entity (Non System Agency): [Dropdown]

Purpose for disclosure: Provisional Voucher

Earliest date of services to be consented: 11/7/2013

Has the client signed the paper agreement form: Yes **8**

Date client signed consent: 11/22/2013

Client Information Options: [List of options]

Consent Expires Upon: [Options]

Disclosure Selection: [List of selections]

Comments: [Text area]

Other Disclosures: [Text area]

**Administrative Actions**

[Print General Consent](#) [Print Criminal Justice Consent](#) **9**

Cancel Save Finish

*NOTE: Clicking Print General Consent will generate a Release of Information for the client to sign.*

# Create the Referral

10. Click Create Referrals Using this Disclosure Agreement.

11. Select the Reason, select Yes for Is Consent Verification Required, select Yes for Is Consent Verified, and select No for Continue this Episode of Care.

12. Select the Facility.

13. Select ATR3 as the Program.

14. Click Save.

**Client Disclosure Agreement** Create Referral Using this Disclosure Agreement

**Note: Consented information may not be redisclosed.**  
Client Name: Morning, Thursday  
Unique Client Number: 21010187389320H  
Discovered From Agency: D Williams Agency

Entities with Disclosure Agreements  
System Agency: Yes  
Disclosed To Agency: RSS Stand Alone  
Disclosed To Entity (Non System Agency):  
Purpose for disclosure: Provisional Voucher

Earliest date of services to be consented: 11/7/2013  
Has the client signed the paper agreement form: Yes Date client signed consent: 11/22/2013

Client Information Options: Admission, CAFAS® Assessment, CALOCUS Assessment, Client Eligibility, Court Monitoring Form, Discharge, Discharge/Continuing Care Planni, Dispensary Order Detail, Drug Test Results, ECourt Admission, ECourt Case Management

Consent Expires Upon: Discharge(UD) +Days, Date Signed(DS) +Days, Other Event(OE) Exp, Crim Just Cond (CJC) Exp

Disclosure Selection: Client Information (Profile) (UD, +365), Consent (UD, +365), Intake Transaction (UD, +365)

Comments: Other Disclosures

Administrative Actions: [Print General Consent](#) [Print Criminal Justice Consent](#)

Finish Revoke

**Client Referral for Morning, Thursday**

Referred By: Agency D Williams Agency, Facility Williams Treatment, Staff Member Buskey, Michelle, Program Williams Treatment/ATR 3 : 1/1/2011 -

Referred To: Signed Consents RSS Stand Alone, Agency RSS Stand Alone, Facility RSS Stand Alone - Boise, Staff Member, Program ATR 3

Reason: Service not available at this facility

If Other:

Is Consent Verification Required? Yes  
Is Consent Verified? Yes  
Continue This Episode of Care? No

Comments:

Referral Status: Referral Created/Pending  
Referral Date: 11/22/2013  
Projected End Date:   
Created Date: 11/22/2013 2:27 PM

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

Cancel Save Finish

# Create the Provisional Voucher

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

16. Click **Add New Authorization Record**.

**NOTE: DO NOT** include GPRA Interview Services on the same authorization as Treatment/RSS services. **Always create a separate Provisional Authorization for GPRA Interview Services.**

Idaho-WITS Training  
 User: Buskey, Michelle  
 Loc: D Williams Agency, Williams Treatment  
 Client: Morning, Thursday | 21010187389320H | Case #: 1  
 October 2013 Rev 3  
 Printable View Logout

**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

Cancel Save Finish

**Authorization List** [Add New Authorization Record](#)

Auth #	Payor	Status	Effective Date	End Date	Encumbered	Expended	Available	Last Activity Date	Actions

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17. Enter the Referral Date as the Date Approved if necessary. *This date MUST NOT predate the Referral Date.*

18. Enter the **Effective Date** (date the client will be starting with the new agency).

19. Enter the **End Date**.

- If the Provisional Voucher is for Treatment or RSS Services, then enter End Date listed on your current Authorization for treatment services.
- If the Provisional Voucher is for GPRA Interview Services, then enter 9/29/14 as the End Date.

20. Click **Save**.

21. Click **Add Service**.

**Authorization for Morning, Thursday**

Group Enrollment: [Redacted] Status: Pending  
 Plan: ATR 3 Contract: 1 - DHW-RSS Stand Alone (ATR) / 7/1/2012 - 6/30/2014  
 Authorization #: [Redacted] Date Approved: 11/22/2013  
 Administering Agency: D Williams Agency Updated Date: [Redacted]  
 Effective Date: 12/29/2013 Updated By: [Redacted]  
 End Date: 1/28/14

Comments: [Redacted]

**Authorized Services List**

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Amount	Available Units	Actions
<ul style="list-style-type: none"> <li>• If the Provisional Voucher is for Treatment or RSS Services, then enter End Date listed on your current Authorization for treatment services.</li> <li>• If the Provisional Voucher is for GPRA Interview Services, then enter 9/29/14 as the End Date.</li> </ul>							

Actions: [Redacted]

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

Buttons: Cancel Save Finish

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**Authorization for Morning, Thursday**

Group Enrollment: [Redacted] Status: Provisional  
 Plan: ATR 3 Contract: 1 - DHW-RSS Stand Alone (ATR) / 7/1/2012 - 6/30/2014  
 Authorization #: 1890 Date Approved: 12/6/2013  
 Administering Agency: D Williams Agency Updated Date: 12/6/2013 12:54 PM  
 Effective Date: 12/9/2013 Updated By: Buskey, Michelle  
 End Date: 1/28/2014

Comments: [Redacted]

**Authorized Services List**

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Amount	Available Units	Actions
<p>Buttons: Cancel Save Finish</p>							

22. Select the **Service** and the **# of Authorized Units** (using the BPA Provider Guide for Provisional Vouchers dated 12/6/13).

23. Click **Save** and **Finish**.

24. **Add Additional Services if needed.** Click **Save** and **Finish**.

**NOTE: DO NOT include GPRA Interview Services on the same authorization as Treatment/RSS services. Always create a separate Provisional Authorization for GPRA Interview Services.**

Authorized Services for Morning, Thursday

Service: Case Management

Authorization #: 1678

# Authorized Units: 1

Cancel Save Finish

Select the Service and the # of Authorized Units.

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Authorization for Morning, Thursday

Group Enrollment: [Redacted] Status: Provisional

Plan: ATR 3 Contract: 1 - DHW-RSS Stand Alone (ATR) / 7/1/2012 - 6/30/2014

Authorization #: 1690 Date Approved: 12/6/2013

Administering Agency: Williams Agency Updated Date: 12/6/2013 12:54 PM

Effective Date: 12/9/2013 Updated By: Buskey, Michelle

End Date: 1/28/2014

Comments:

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Amount	Available Units	Actions
Case Management	1	\$50.00	\$0.00	\$0.00	\$50.00	1.00	Edit   Delete

Add Additional Services if needed.

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Total Authorized: \$50.00

Total Encumbered: \$0.00

Total Expended: \$0.00

Total Available: \$50.00

Cancel Save Finish