

Accepting Referrals, Linking Consents, & Accepting the Initial Authorization

Reviewing the Referral

Only designated staff should accept Referrals and Authorizations from other agencies.

1. **Getting here:** Login, select **Facility 1**, select **Agency**, **Referrals**, and **Referrals In** on the left menu.
2. Move the Referral Status Code of **Referral Created/Pending** to the Search Criteria box.
3. The list of Pending Referrals displays.
4. Verify the client does not already exist in your agency. Click **Client List**.

Idaho-WITS Training

Referrals for Treatment Location 1 (Export)

Referral Status Codes: Placed/Accepted, Referred Terminated, Refused Treatment, Rejected by Program

Search Criteria: Referral Created/Pending

Client Id: [] Created Date: [] Referred Date: []

First Name: [] Last Name: []

Clear Go

Actions	Client ID	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments

Referrals for Treatment Location 1 (Export)

Referral Status Codes: Placed/Accepted, Referred Terminated, Refused Treatment, Rejected by Program

Search Criteria: Referral Created/Pending

Client Id: [] Created Date: [] Referred Date: []

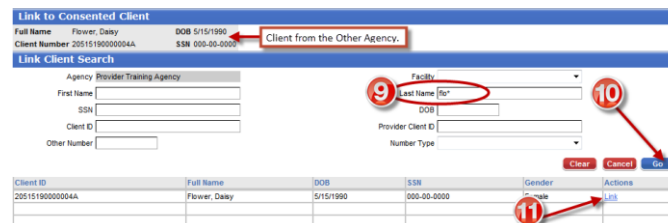
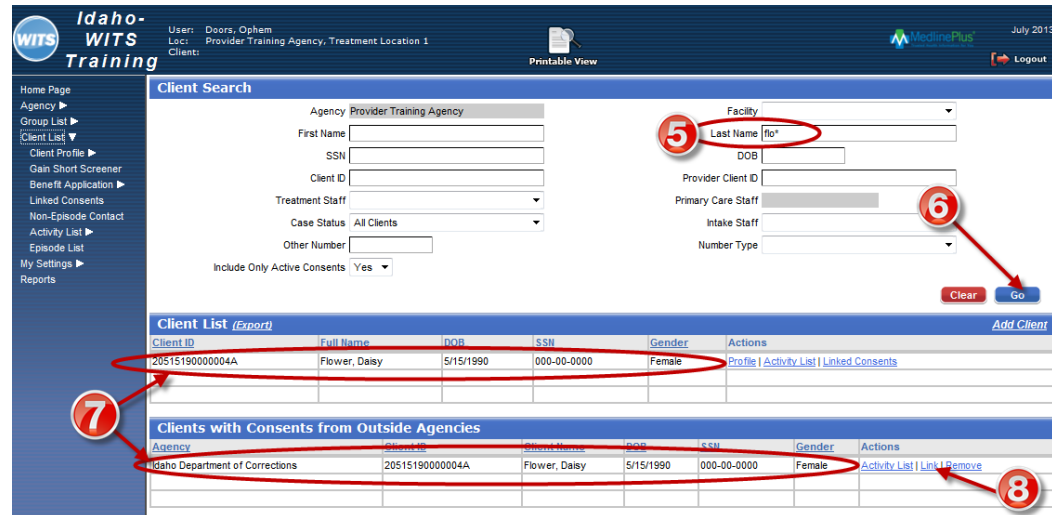
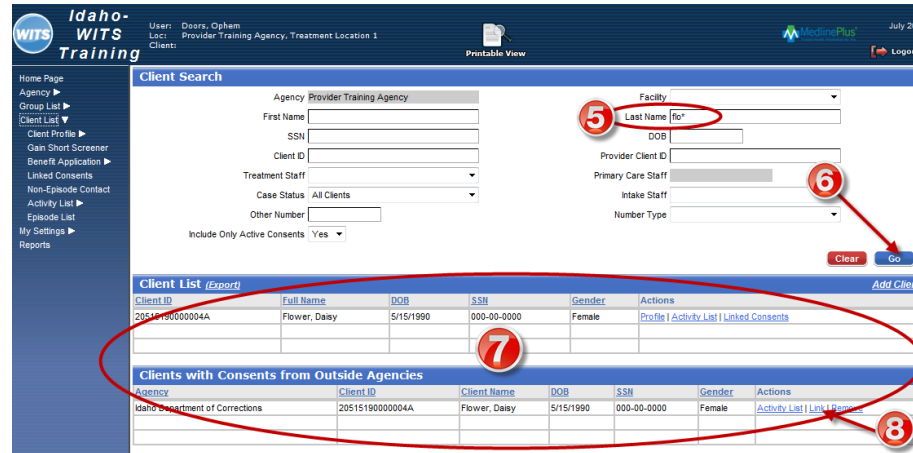
First Name: [] Last Name: []

Clear Go

Actions	Client ID	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
Review	208151950000014	Guava, A	8/15/1995	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	208151950000024	Guava, B	8/15/1995	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	108011000000134	M	8/11/1988	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	208151950000034	C	8/15/1995	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	1080318300000144	Mango, N	8/3/1983	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	1081016900000154	Mango, O	8/10/1969	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	1080517700000164	Mango, P	8/5/1977	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	1081118200000174	Mango, Q	8/11/1982	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	1080918900000184	Mango, R	8/9/1989	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	1081219200000194	Mango, S	8/12/1992	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	1081316400000204	Mango, T	8/13/1964	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	1081816800000214	Mango, U	8/18/1968	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	1081517000000224	Mango, V	8/15/1970	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	
Review	20515190000041	Flower, Daisy	5/15/1990	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	

Searching for the Client and Linking the Consent

5. **Enter the search criteria** for the client in your agency. The example uses the first three letters of the client last name with an asterisk.
6. Click **Go**. Using the asterisk in the Last name field will display all clients with the last name starting with the letters of flo.
7. Clients in your agency will display in the Client List section of the screen. Clients with consents from another agency will display in the Clients with Consents from Outside Agencies section of the screen. **Verify the clients are the same.**
8. Click **Link**.
9. **Enter the search criteria** for the client in your agency.
10. Click **Go**.
11. Click **Link**.



12. Click **Yes**.

13. The consented information from the outside agency is linked to the existing client in your agency. Click **Agency** on the left menu to accept the Referral.

Are you sure you want to link current consented client Flower, Daisy's consent to client Flower, Daisy?

Yes No

12

The screenshot shows the 'Idaho WITS Training' interface. At the top, the user is identified as 'User: Davis, Opnem' with location 'Provider Training Agency, Treatment Location 1' and client 'Flower, Daisy | 20515190000004A'. The main heading is 'Linked Client Consents in Other Agencies'. Below this is a 'Consenting Agency' dropdown menu. A table titled 'Linked Consent List' contains one entry for 'Idaho Department of Corrections' for client 'Flower, Daisy'. The table columns are Agency, Client Name, Client ID, DOB, SSN, Min Act. Date, Max Act. Date, and Actions. A red circle with the number '13' is placed over the 'Agency' column of the table. On the left, a navigation menu includes 'Agency', 'Group List', 'Client List', 'Client Profile', 'Gain Short Screener', 'Benefit Application', 'Linked Consents', 'Non-Episode Contact', 'Activity List', 'Episode List', 'My Settings', and 'Reports'. A red arrow points from the 'Agency' menu item to the 'Agency' column of the table.

Agency	Client Name	Client ID	DOB	SSN	Min Act. Date	Max Act. Date	Actions
Idaho Department of Corrections	Flower, Daisy	20515190000004A	5/15/1990	000-00-0000	8/1/2013	8/1/2013	Consented Activity List Unlink

13

Accepting the Referral

14. Select **Referrals** and **Referrals In** on the left menu.

15. Move the Referral Status Code of **Referral Created/Pending** to the Search Criteria box and enter any additional search criteria.

16. Click **Go**.

17. Click **Review** for the selected Referral.

18. Select **Placed/Accepted** as the Referral Status.

19. Click **Finish**.

WITS Idaho-WITS Training

User: Doors, Ophem
Loc: Provider Training Agency, Treatment Location 1
Client: Flower, Daisy | 2051519000004A

Printable View

July 2013

Referrals for Treatment Location 1

Referral Status Codes: Placed/Accepted, Referred Terminated, Refused Treatment, Rejected by Program

Search Criteria: Referral Created/Pending

Client ID: _____ Created Date: _____ Referred Date: _____

First Name: _____ Last Name: _____

Clear Go

Actions	Client ID	Client	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
Rev	2051519000004A	Flower, Daisy	5/15/1990	8/15/2013	Idaho Department of Corrections/Central Office	Substance Abuse Outpatient (Non Intensive)	Referral Created/Pending	Treatment Location 1	

Client Referral for Flower, Daisy

Referred By:

Agency: Idaho Department of Corrections
Facility: Central Office
Staff Member: Buskey, Michelle
Program: _____
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: Provider Training Agency
Agency: Provider Training Agency
Facility: Treatment Location 1
Staff Member: _____
Program: Adult Outpatient (I)
State Reporting Category: Adult Outpatient
Non-System Agency: _____
Non-System Modality: _____
Non-System Specifier: _____
Appt Date: _____ Undetermined

Consents Granted
Consent Date: 8/1/2013
Disclosure Domains:
Client Information (Profile) (UD, +365)
GAIN-SS (UD, +365)
Intake Transaction (UD, +365)

Comments

Referral Status: Placed/Accepted
Referral Date: 8/1/2013
Projected End Date: _____
Created Date: 8/15/2013 10:09 PM

Cancel Finish

Accept the Authorization

20. The Client Profile displays. Click **Authorization** on the left menu.

21. Click **Profile**.

Idaho-WITS Training | User: Provider Training Agency, Treatment Location 1 | Client: Flower, Daisy | 2051519000004A | Case #: 1

Client Profile for Flower, Daisy

First Name: Daisy | Middle Name: | Last Name: Flower | Gender: Female | DOB: 8/15/1990 | SSN: 000-00-0000

Provider Client ID: | Client ID: 2051519000004A | State Client ID: | Record Created By: Buskey, Michelle | Last Updated By: Buskey, Michelle | Created Date: 8/15/2013 9:59 PM | Last Updated Date: 8/15/2013 10:11 PM

Driver's License: | Access Category: | Has paper file: Yes

Administrative Actions: [Cancel](#) [Save](#) [Finish](#)

Alternate Names

Last Name	First Name	Middle Name	Client Alias Type	Actions

Addresses

Address Type	Address	Confidential	Created	Updated	Actions
Client Home	123 B street meridian, ID 83642	No	8/15/2013	8/15/2013	Review Delete

Authorization List [Add New Authorization Record](#)

Auth #	Pavor	Status	Effective Date	End Date	Authorized	Encumbered	Expended	Available	Last Activity Date	Actions
1331		Pending	8/1/2013	6/30/2014	\$355.00	\$0.00	\$0.00	\$355.00	8/15/2013	Profile

22. Click Accept.

23. Click Yes.

Authorization for Flower, Daisy

Group Enrollment		Status	Pending
Plan	IDOC - SUD Provider	Contract	4 - IDOC-Provider Training Agency / 7/1/2013 - 6/30/2014 - IDOC - SUD Provider-IDOC Group
Authorization #	1331	Date Approved	8/1/2013
Administering Agency	Idaho Department of Corrections	Updated Date	8/15/2013 10:09 PM
Effective Date	8/1/2013	Updated By	Buskey, Michelle
End Date	6/30/2014	Stage	

Comments

Authorized Services List

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
Outpatient	25	\$355.00	\$0.00	\$0.00	25.00

22

Actions - [Accept](#) [Decline](#)

Total Authorized:	\$355.00
Total Encumbered:	\$0.00
Total Expended:	\$0.00
Total Available:	\$355.00

[Finish](#)

Are you sure you want to Accept this Authorization?

[Yes](#) [No](#)

23

24. The Authorization is Active. Click **Finish**.

Authorization for Flower, Daisy

Group Enrollment	IDOC Group	Status	Active
Plan	IDOC - SUD Provider	Contract	4 - IDOC-Provider Training Agency / 7/1/2013 - 6/30/2014 - IDOC - SUD Provider-IDOC Group
Authorization #	1331	Date Approved	8/1/2013
Administering Agency	Idaho Department of Corrections	Updated Date	8/15/2013 11:48 PM
Effective Date	8/1/2013	Updated By	Doors, Ophem
End Date	6/30/2014	Stage	

Comments

Authorized Services List

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
Outpatient	25	\$355.00	\$0.00	\$0.00	25.00

Actions [Close](#) [Requests](#)

Total Authorized: \$355.00
Total Encumbered: \$0.00
Total Expended: \$0.00
Total Available: \$355.00

24

Finish