WITS ATR Iowa Web Infrastructure for Treatment Services

Access to Recovery
Voucher Management System

USER GUIDE
Recovery Support

IDPH
Iowa Department of Public Health

October 2015

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Introduction

The Access to Recovery – Iowa (ATR) Voucher Management System (VMS) is a Web-based Infrastructure Treatment System (WITS) developed by FEI and purchased by the Iowa Department of Public Health (IDPH) in order to manage client involvement in ATR.

The VMS is used by:

1. Care coordination providers
2. Recovery support service (RSS) providers
3. Iowa Department of Public Health staff
4. FEI

The VMS is used for the following activities:

1. Record client profile information (name, address, contacts)
2. Input GPRA interview data to submit to the Substance Abuse and Mental Health Services Administration (SAMHSA)
3. Input client voucher information
4. Send referrals from care coordination to recovery support service providers
5. Enter encounters when client services are provided
6. Manage grant funds available for client vouchers
7. View reports to determine what services are used

The VMS consists of two separate Web sites:

1. Training Site: used by all providers of ATR to learn the VMS. The training site should not contain actual/real client information
2. Production Site: after organization staff has been trained and have learned to navigate the ATR VMS training site, and the organization is ready to begin providing ATR covered services, an account is created for each trained staff member on the production site. The production site is the "live" ATR VMS site that actual client information is entered

Technical Assistance:	
ATR Training Site:	https://iaatr-training.witsweb.org/
ATR Production Site:	https://iaatr.witsweb.org/p/#stay
For technical assistance:	1-866-923-1085 1-515-242-5934 julie.jones@idph.iowa.gov
ATR General Information:	http://idph.iowa.gov/atr

Getting Started

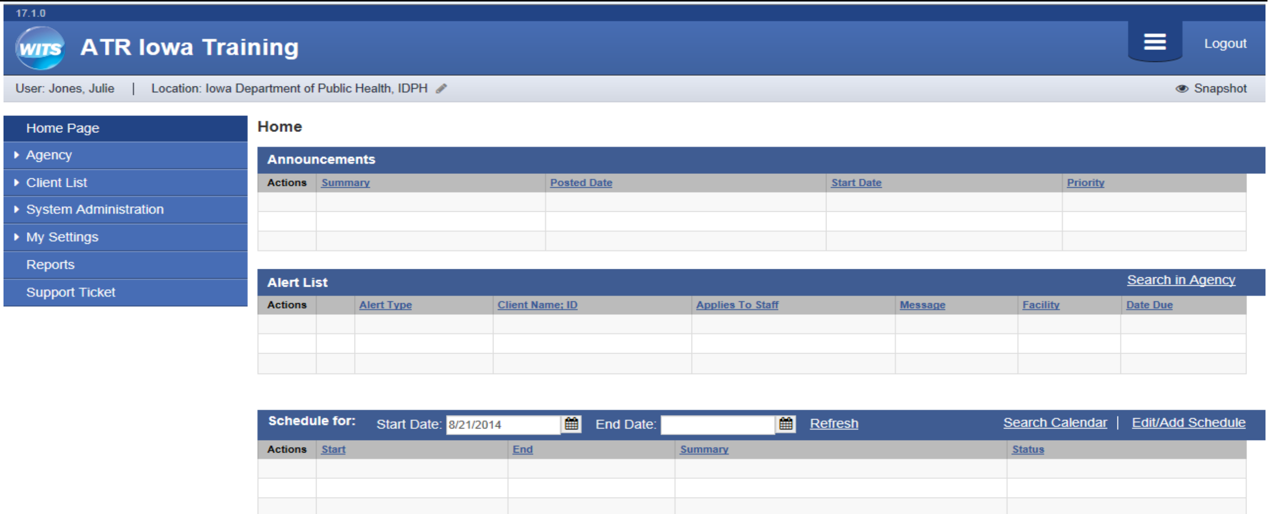
1. Contact ATR staff to set up an ATR training (**training must be done prior to providing ATR covered services!**).
2. Provide ATR staff with the following:
    i. First and Last Name of each staff member that will provide ATR covered services
    ii. E-mail address of each staff member that will provide ATR covered services
3. ATR staff will establish an account for each individual providing ATR services
4. Provider staff members will receive the following:
    i. E-mail from the ATR - VMS with Username, Password and Pin
    ii. Welcome e-mail from IDPH with an attached ATR Provider Manual
5. Provider staff should login to the Training Site with the username, password and PIN that was sent to them
6. At the first login, users will be prompted to change their password and PIN. (**Please remember to write down and keep your username, password and PIN!)**
7. Be sure to bring your login, password and PIN to any ATR VMS training

NOTE: Throughout the ATR VMS, you will see the following buttons:

	Clears all information entered and returns to the previous screen
	Takes you to the previous screen
	Takes you to the next the screen
	Saves the information on the current screen
	Saves the information on the current screen and returns you to the most recent screen/list
	Allows for the export of the corresponding information as a .CSV file that can be opened in Excel.

***Export* Note:** *you may need to enable "pop-ups" on your computer from this website (see your IT administrator). You can also hold the Ctrl key while you click "Export" and click "Open" on the prompt to export files from the ATR VMS.*

Home Page



User, Loc and Client:

User: indicates what user is logged in

Loc: indicates agency and facility

Client: indicates which client file you are currently working in (any action that you take may reflect on the client that appears here)

Menu List (navigation pane on left side of ATR VMS window)**:**

- **Home Page:** allows you to return to the home page
- **Agency:** contains information about billing and agency profile
- **Client List:** access to client files
- **System Administration:** provides system information
- **My Settings:** allows user to change facility and password
- **Reports:** provides billing and other various reports

Announcements:

- The Announcement field will contain contact information for technical assistance

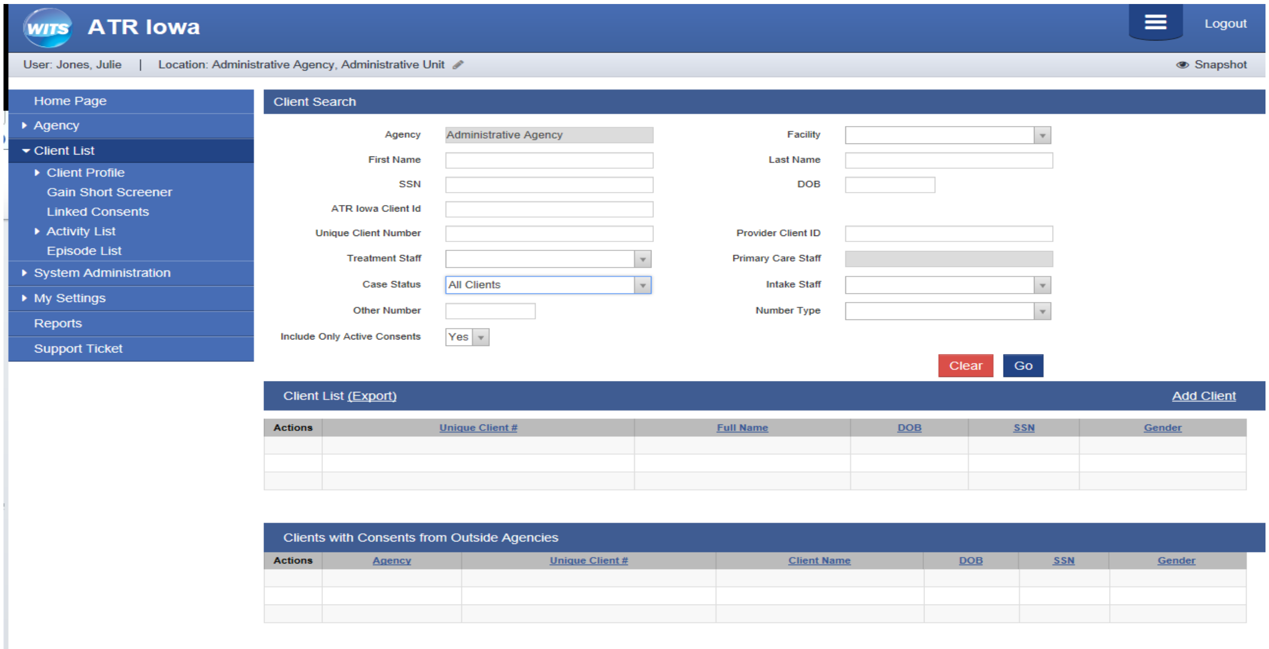
Alert List:

- The Alert List field will contain provider specific alerts. (see Appendix A for creating an Alert)

Schedule:

- Providers have the ability of maintaining an ATR-specific schedule in order to track client appointments, follow up interviews, etc. (see Appendix A for creating an appointment)

Client List



Client Search:

1. Search criteria include Name, Social Security Number, Client ID, etc. Choose any search criteria and click **Go**
2. To search ALL clients, do not select any search criteria and click **Go**

Client List:

1. Review the Client List (the Client List is automatically alphabetized by the last name of the client; you may change the sort order by clicking on the column title: Client ID, Full Name, DOB, SSN, Gender)
2. Under the Actions column, click on **Profile** or **Activity List** (depending on what actions you wish to make)

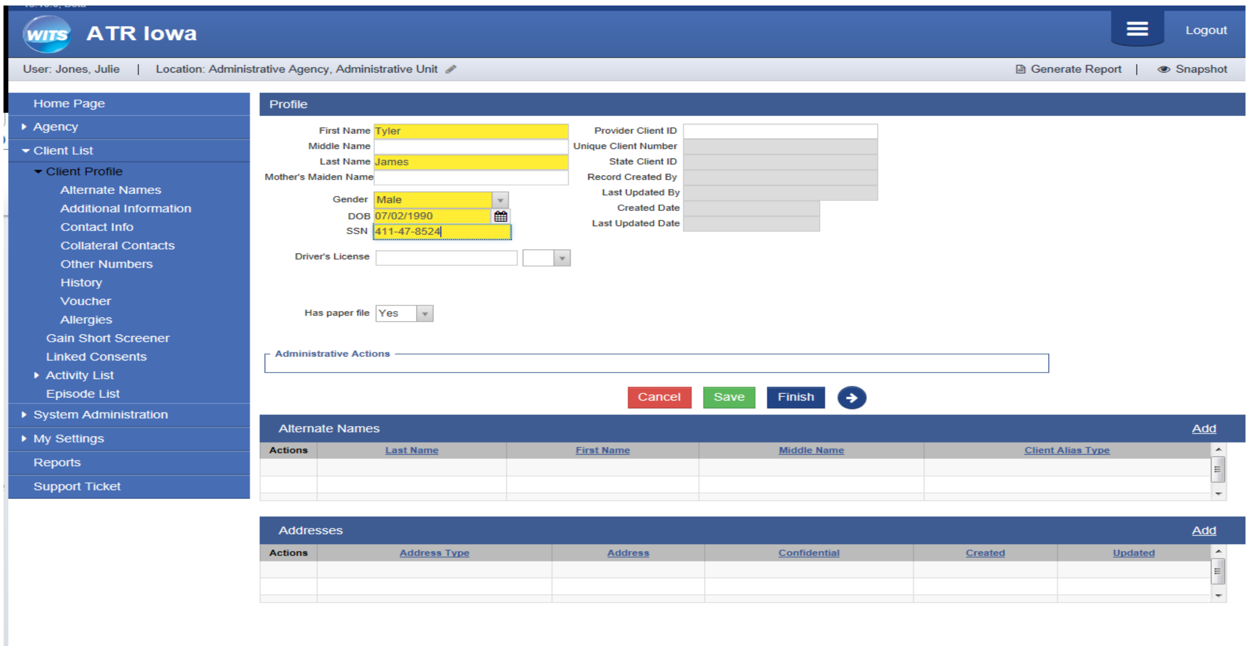
Clients with Consents from Outside Agencies:

1. Clients that have signed consents from ATR Care Coordination providers will appear in this list

Client Profile

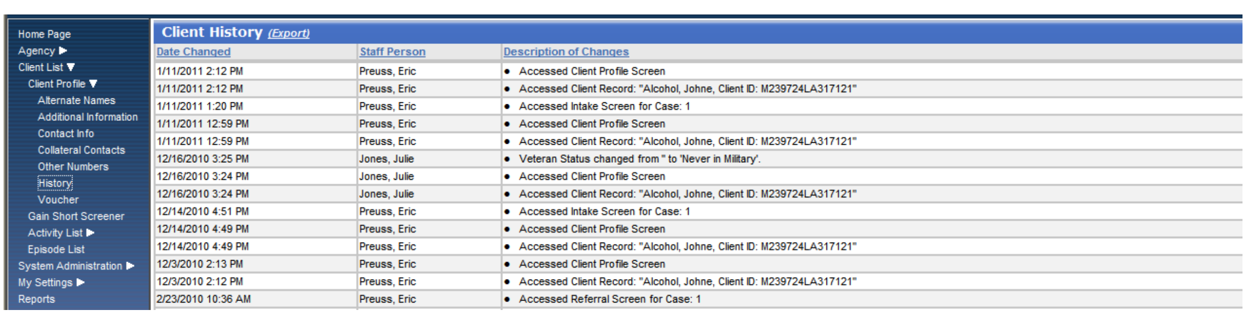
Client Profile:

1. View the client profile information on the following pages (either by using the link on the navigation bar on the left side of the window or using the arrows):
    a. Client Profile
    b. Alternate Names
    c. Additional Information
    d. Contact Info
    e. Collateral Contacts
    f. Other Numbers



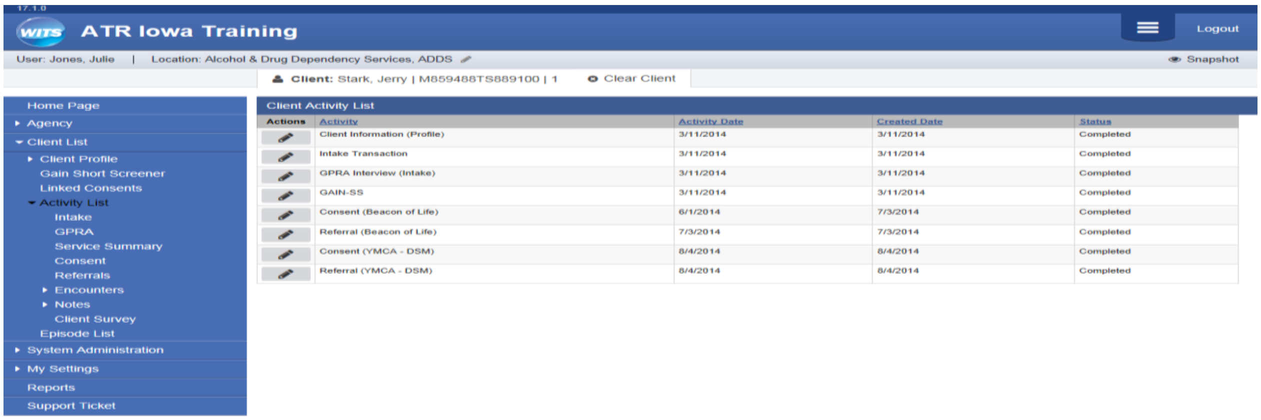
History:

1. By selecting ***History*** under Client Profile, all the actions taken in this client file are shown on one screen
2. Date, Staff Person and Description are shown



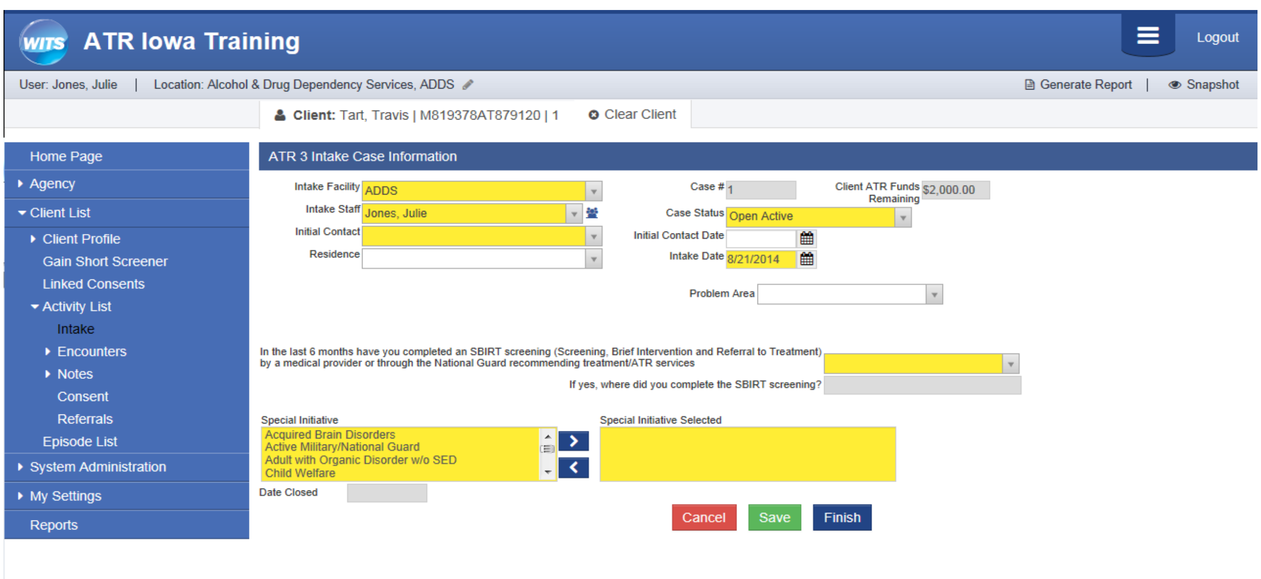
Activity List

The Activity List will show all the activities that have completed for a client—with the exception of vouchers



Intake:

1. The client must be enrolled in the ATR program
2. In order to view the Intake, click on **Activity List**
3. Click on **Review** next to Intake Transaction

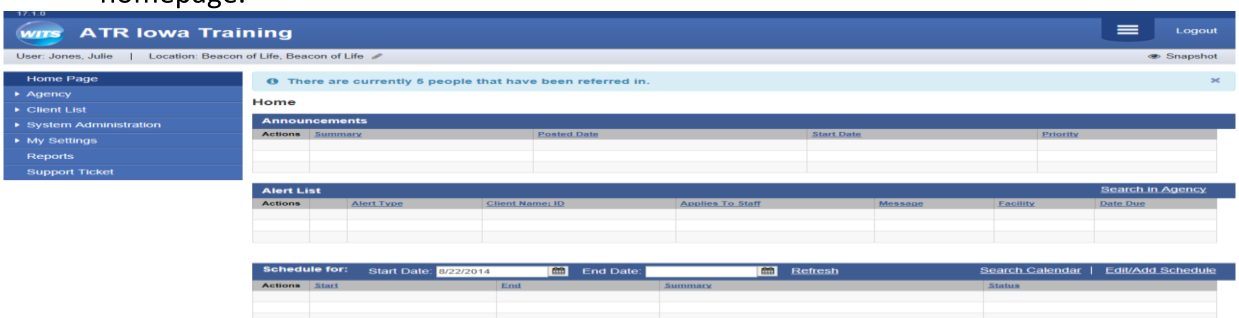


Referrals and Vouchers

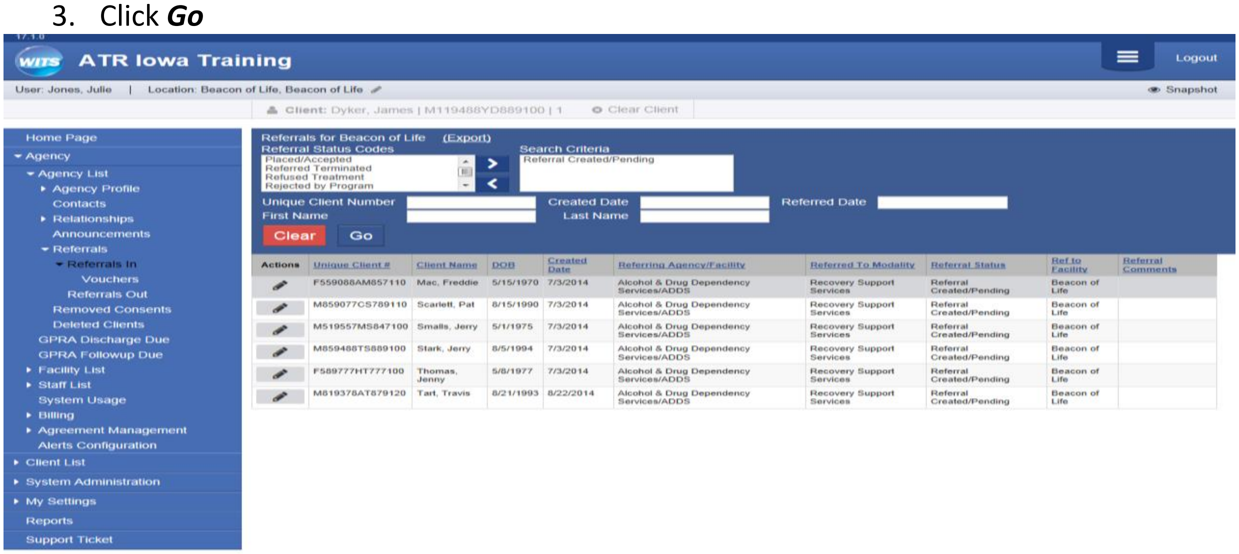
Referral vouchers are created by Care Coordinators for clients to receive services at Recovery Support Providers. During the ATR Assessment, the Care Coordinator reviews the available ATR services and providers with the client. Generally, a client is to have at least TWO service providers from which to select. <u>The client then selects the services and providers they feel will most benefit their recovery</u> and the Care Coordinator will complete a **Consent** (Release of Information), **Referral**, and **Voucher** for each agency the client selected.

Viewing referrals:

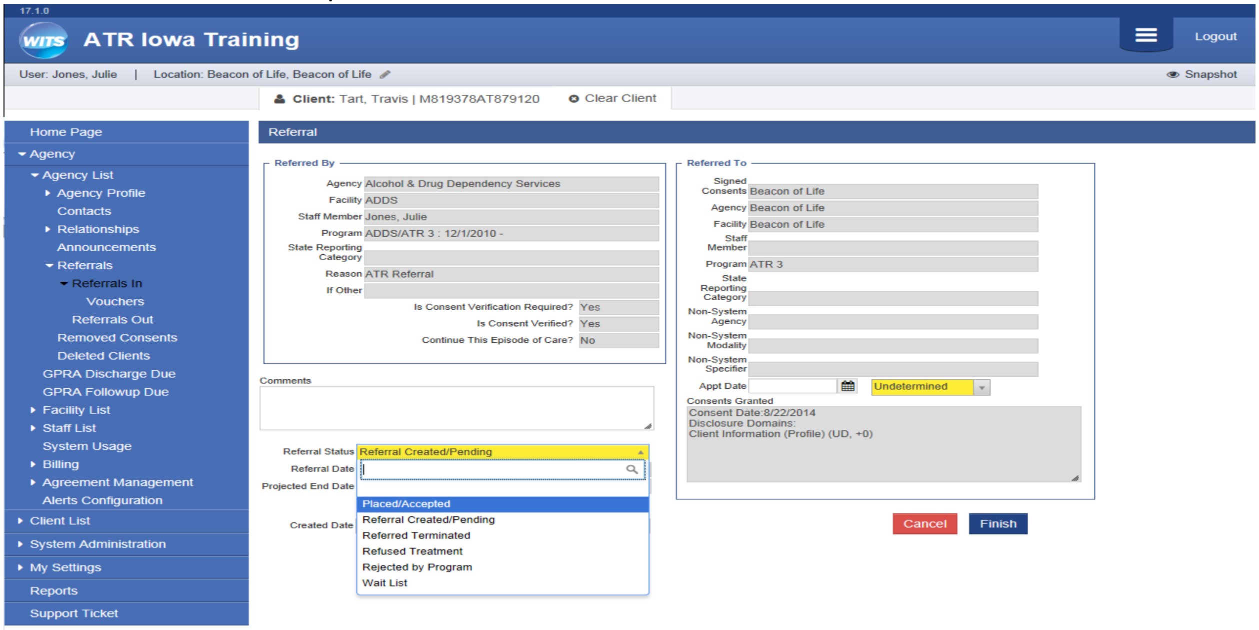
1. An indication that a referral has been made to your organization will appear on your homepage.



2. To view referrals received by your organization, click:
    a. **Agency**
    b. **Referrals**
    c. **Referrals In**
    d. Change search criteria (by selecting the criteria and clicking the right arrow) or leave blank
3. Click ***Go***

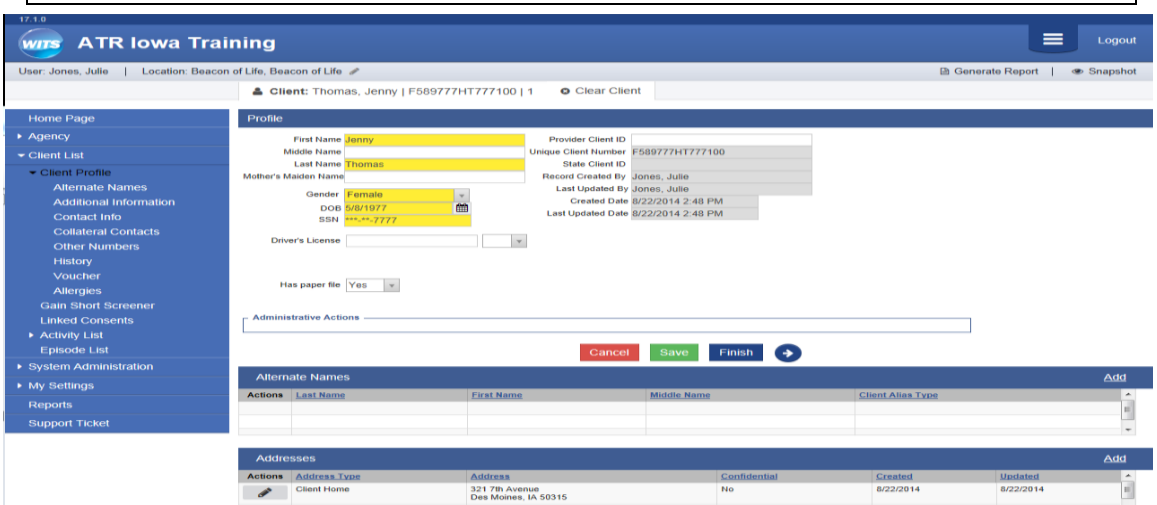


4. Click on **[Review]** next to the selected referral
5. View the referral profile

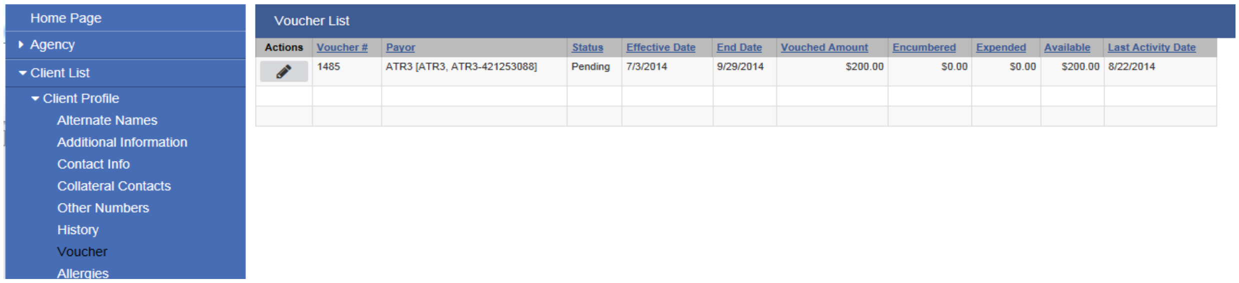


6. Change the Referral Status to Placed/Accepted
7. Click ***Finish***

Note: *by clicking Finish, you'll be re-directed to the client profile.*

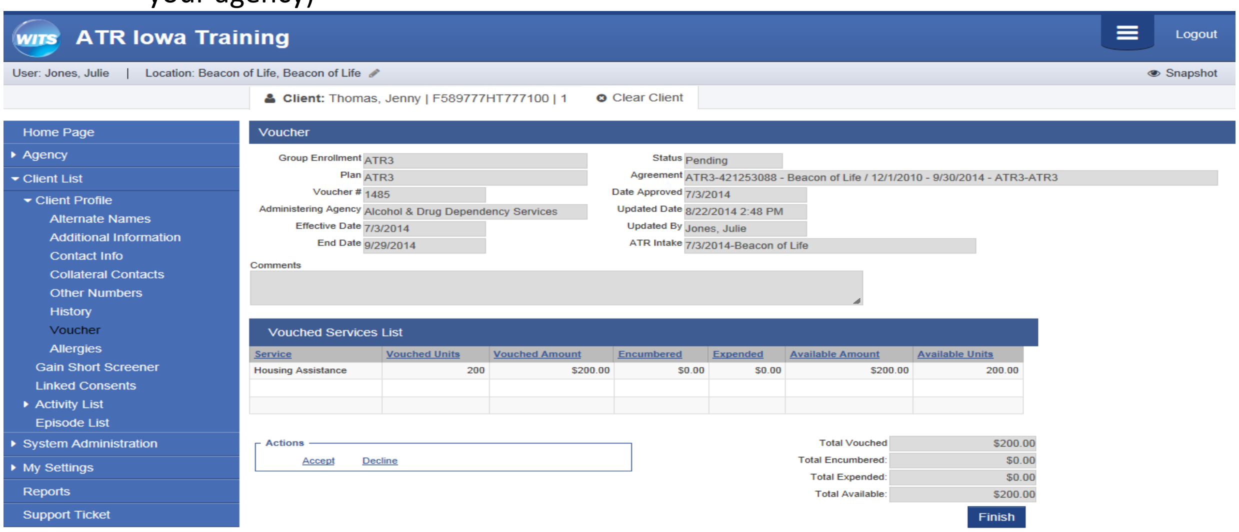


1. When the Client Profile screen appears, you may review the client information
2. On the menu bar, click **Voucher** and the **Voucher List** window will open and list the vouchers created by the Care Provider for the Recovery Support services from your organization.



Accepting / Declining a Voucher:

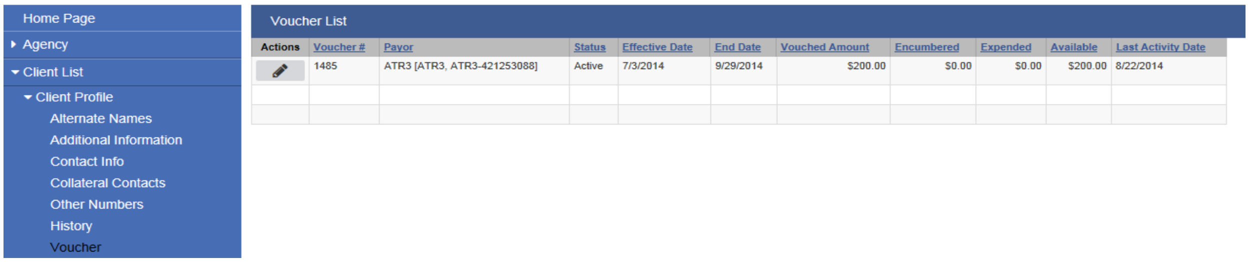
1. Click **Profile** to view the specific voucher information
2. To accept or decline this voucher, click:
    a. ***Accept***: accepts the voucher and voucher amount (this will activate the voucher for your agency)
    b. ***Decline***: declines the voucher and voucher amount (this will close the voucher for your agency)



> ***Note:*** *you may decline the voucher for many different reasons, including:*
> 1. *no capacity to serve this client*
> 2. *client has been denied services previously at your agency*
> 3. *amount may not be sufficient to serve the client based on ATR service rates*
>
> ***If declining the voucher, please contact the care coordinator directly at the referring agency to inform them of the reason for the denial.***

Viewing an existing voucher:

1. To access an existing client voucher, click:
   a. **Client Profile**
   b. **Voucher**
   c. **Profile** (located on the right side of the screen)



Closing a voucher:

*This should be done ONLY if a client will no longer receive services at your agency.

1. To access an existing client voucher, click:
   a. **Client Profile**
   b. **Voucher**
   c. **Profile** (located on the right side of the screen)
2. Under Actions, click **Close**

Re-Opening a voucher:

- There will be times when a voucher will close (no services entered in the last 30 days). Please contact the client's ATR Care Coordinator to have the voucher re-opened.

Viewing all vouchers for a client:

1. To view the vouchers that have been created for a client, click:
   a. **Agency**
   b. **Billing**
   c. **Voucher List**
2. Leave the fields blank to search all clients for your organization and click ***Go***
3. To search a specific client, enter any of the search criteria (First Name, Last Name, Client ID, etc) and press ***Go***
4. Click **View** for the selected voucher

Encounters

An Encounter is entered each time an ATR service is provided to a client. Encounters indicate what service was provided, the service date, service units provided, and a progress note documenting the service provided.

An Encounter must be entered within 7 calendar days of the date the service was provided.

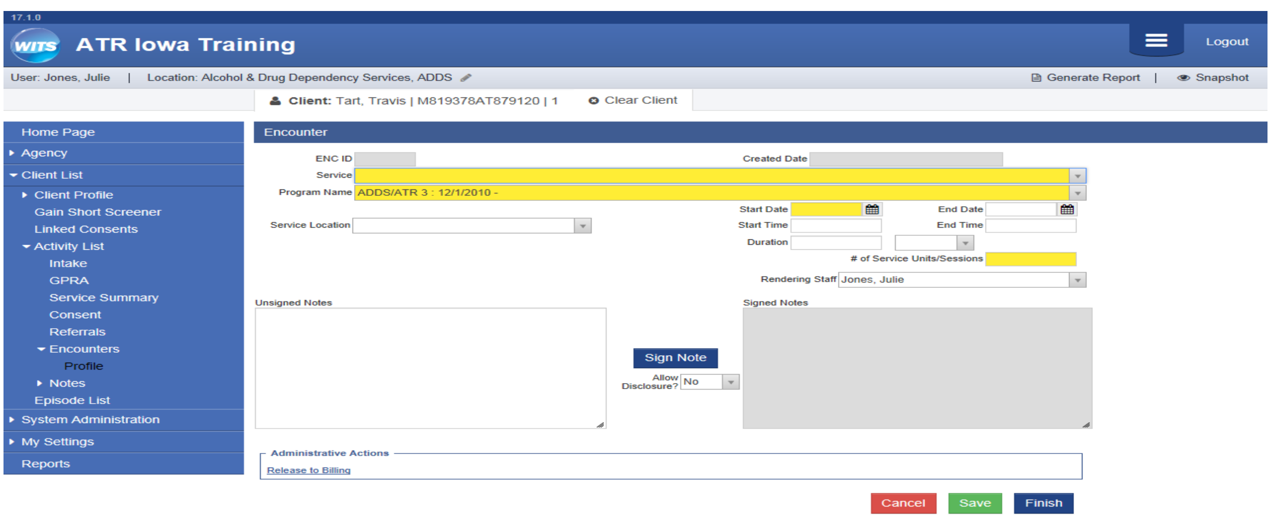
(Providers of **Housing Assistance** should enter an Encounter at the end of each month for the amount of services provided to the client.)

On the Encounter Record, the yellow fields are required. White fields may also be completed. IDPH requires documentation be kept for each service provided to the client, including the required fields on the Encounter (service, start date, units provided) and a progress note that show services were provided in accordance with the ATR Provider Manual. Progress Notes are to be recorded directly on the Encounter Record under "Notes."

Adding an encounter:

To enter an encounter when a service was provided, click:

1. **Activity List**
2. **Encounters**
3. ***Add Encounter Record***



The following fields must be completed:

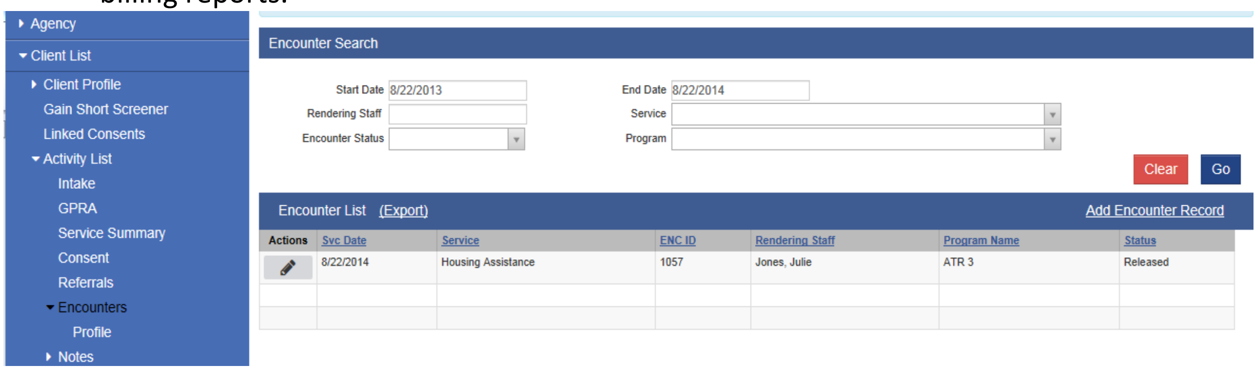
- **Service**: select the service that the client has available on the voucher
- **Start Date**: enter the date the service was provided
- **# of Service Units/Sessions**: enter the number of units provided (refer to the ATR Provider Manual for unit specifications)

- **Unsigned Notes**: must be filled out to enter case / progress notes and then click on **Sign Note**

Fields that may be completed, but are not required:

- **End Date**: record if the encounter covers more than one day (e.g., housing assistance)
- **Start Time / End Time**: record these times for documentation-purposes
- **Duration**: record duration of service

4. Click **Save**
5. Click **Release to Billing** (this must be done in order for the Encounter to be sent for payment (as a claim item) and appear on the Payment List and/or Claims Reconciliation billing reports.



Reviewing encounters:

> ***Note:*** *the Start Date of the Encounter MUST be within the date range of the active voucher. If the date range of the active voucher does not encompass the Start Date of the Encounter, contact the Care Coordinator for the client.*

1. To review entered encounters, click:
   a. **Activity List**
   b. **Encounters**
   c. ***Review*** next to the selected encounter

> ***Note:*** *the Status of the Encounter is viewable from the Encounter List screen.* ***Released*** *means the Encounter has been sent to IDPH;* ***Not Released*** *means that* ***Release to Billing*** *was not clicked on the encounter profile screen.*

Adjusting / Deleting Claim Items (Encounters that have been released to billing):

A Claim Item may be adjusted or reversed after it has been saved and released to billing. To ensure accuracy in the information that is maintained in the ATR VMS and uploaded to SAMHSA, errors in billing must be adjusted to accurately reflect services that were provided.

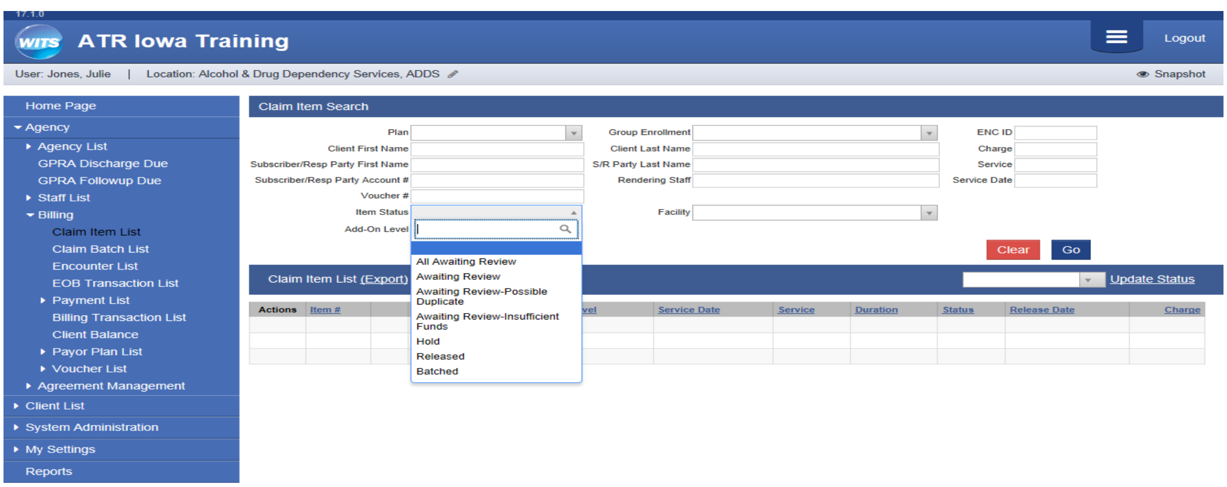
Once the Encounter's claim item is adjusted or reversed, it will not appear on the Claims Reconciliation Report as adjusted or reversed until the following day (the data is processed and updated nightly).

If your agency has received payment for an Encounter that you are adjusting or reversing, increase or decrease the billing amount on the next General Accounting Expenditure (GAX) form. Make a note on that GAX indicating that an adjustment was made and for which month.

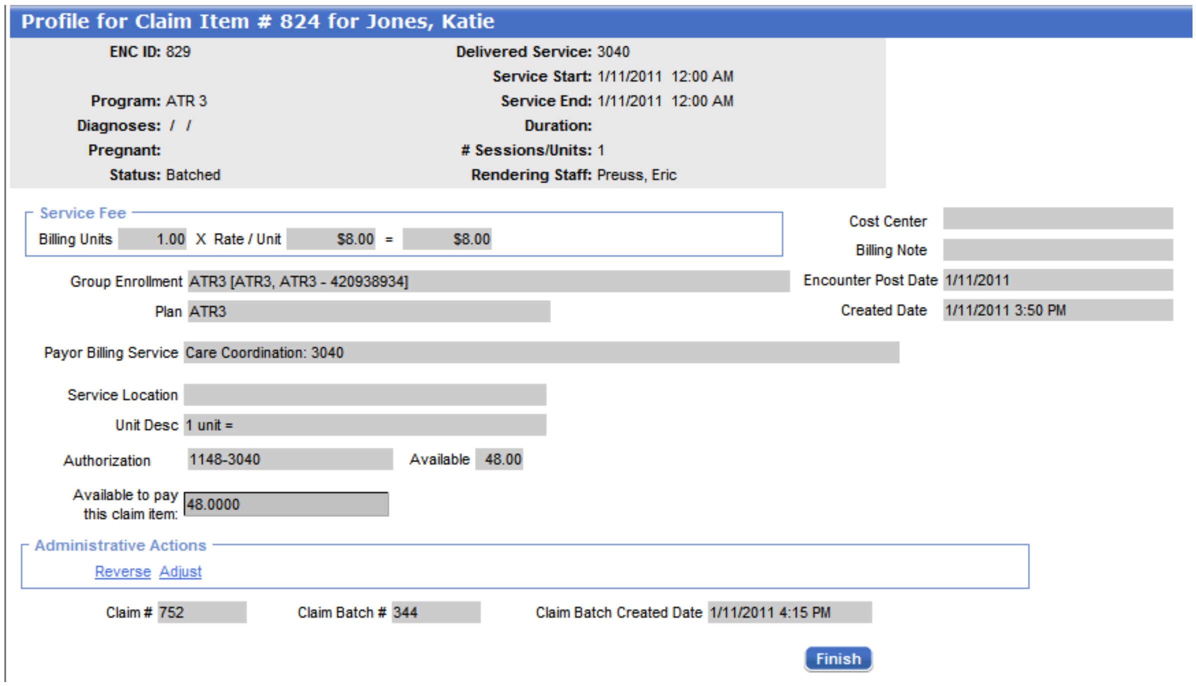
To adjust or reverse Claim Item click:

1. **Agency**
2. **Billing**
3. **Claim Item List**
4. Change **Item Status** from "All Awaiting Review" to BLANK
5. **Go**

   ***NOTE:** Claims can also be "searched" by entering Client Last Name and/or, First Name, and/or ENC ID (Encounter ID) and then clicking **Go**.*



6. Once the claim is found, select the claim to modify by clicking on **Profile** next to the selected Claim Item and the Profile for the Claim Item selected will open.



Under Administrative Actions, choose one of the following:

1. **Reverse**: select if the encounter was mistakenly entered
    a. Click **Yes** when prompted
2. **Adjust**: select in order to increase or decrease the number of units entered
3. Click **Yes** when prompted
4. Enter the correct number of units
5. **Reject (Back Out)**: select to delete the claim item (this option will only appear on the same day an Encounter was entered)
    a. Click **Yes** when prompted

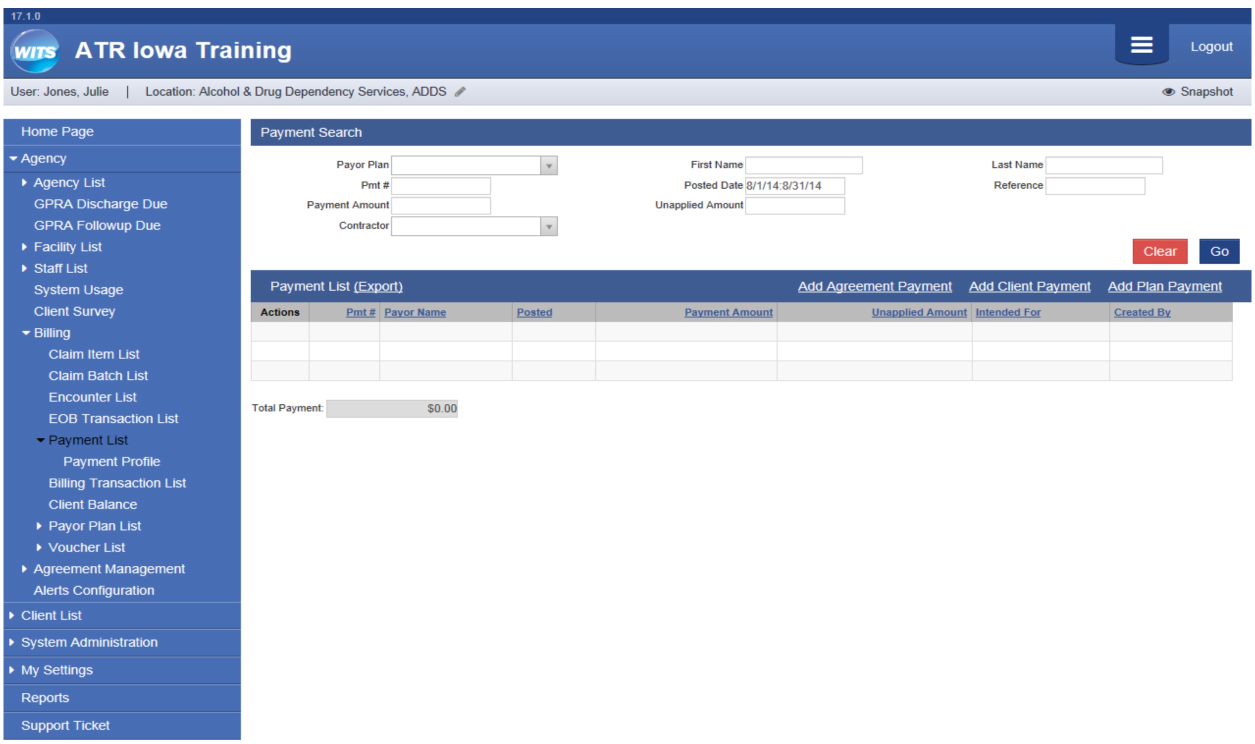
NOTE: *If no options appear under Administrative Actions, the Voucher has been closed. Re-open the Voucher in order to adjust / reverse the Encounter.*

Billing/Payment Report

At the end of each month use the **Payment List** to have the ATR VMS generate the total amount of services provided. This total is entered on the General Accounting Expenditure (GAX) form and submitted to IDPH for payment.

To use the **Payment List** click:

- **Agency**
- **Billing**
- **Payment List**
    1. Enter "month-date-year:month-date-year" (e.g., 12-1-10:12-31-10) in the **Posted Date** field
    2. Click **Go**
    3. All claim items and reversals will be listed and the **Total Payment** field at the bottom of the screen will contain the claim total for the month.
    4. The **Payment List** can be exported in an Excel format.
- Enter the **Total Payment** amount on the GAX



Claims Reconciliation Report

The **Claims Reconciliation Report** can be used to search for claim items (encounters released to billing). This report can also be used to track client services.

To run the Claims Reconciliation to search for client information, click:

1. **Reports**
2. **Claims Reconciliation**
3. If searching by client, enter the **Clients First Name** and/or **Last Name;** If searching for the **Adjudicated Date** enter **From:** first date of the month and **To:** last date of the month
4. **Go**
5. **Export** the file into an Excel spreadsheet