



ATR
Iowa

Web Infrastructure for Treatment Services

Access to Recovery Voucher Management System

USER GUIDE Recovery Support



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

17.1.0

WITS ATR Iowa Training Logout

User: Jones, Julie | Location: Iowa Department of Public Health, IDPH Snapshot

- Home Page
- Agency
- Client List
- System Administration
- My Settings
- Reports
- Support Ticket

Home

Announcements				
Actions	Summary	Posted Date	Start Date	Priority

Alert List							Search in Agency
Actions	Alert Type	Client Name: ID	Applies To Staff	Message	Facility	Date Due	

Schedule for: Start Date: 8/21/2014 End Date: Refresh Search Calendar Edit/Add Schedule

Actions	Start	End	Summary	Status

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

Agency: Administrative Agency | Facility: [Dropdown]

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

SSN: [Text] | DOB: [Text]

ATR Iowa Client Id: [Text]

Unique Client Number: [Text] | Provider Client ID: [Text]

Treatment Staff: [Dropdown] | Primary Care Staff: [Text]

Case Status: All Clients [Dropdown] | Intake Staff: [Dropdown]

Other Number: [Text] | Number Type: [Dropdown]

Include Only Active Consents: Yes [Dropdown]

[Clear](#) [Go](#)

Client List (Export) [Add Client](#)

Actions	Unique Client #	Full Name	DOB	SSN	Gender

Clients with Consents from Outside Agencies

Actions	Agency	Unique Client #	Client Name	DOB	SSN	Gender

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

Client History <i>(Export)</i>			
	Date Changed	Staff Person	Description of Changes
Client Profile	1/11/2011 2:12 PM	Preuss, Eric	• Accessed Client Profile Screen
Client Profile	1/11/2011 2:12 PM	Preuss, Eric	• Accessed Client Record: "Alcohol, John, Client ID: M239724LA317121"
Client Profile	1/11/2011 1:20 PM	Preuss, Eric	• Accessed Intake Screen for Case: 1
Client Profile	1/11/2011 12:59 PM	Preuss, Eric	• Accessed Client Profile Screen
Client Profile	1/11/2011 12:59 PM	Preuss, Eric	• Accessed Client Record: "Alcohol, John, Client ID: M239724LA317121"
Client Profile	12/18/2010 3:25 PM	Jones, Julie	• Veteran Status changed from "Never in Military"
Client Profile	12/18/2010 3:24 PM	Jones, Julie	• Accessed Client Profile Screen
Client Profile	12/18/2010 3:24 PM	Jones, Julie	• Accessed Client Record: "Alcohol, John, Client ID: M239724LA317121"
Client Profile	12/14/2010 4:51 PM	Preuss, Eric	• Accessed Intake Screen for Case: 1
Client Profile	12/14/2010 4:49 PM	Preuss, Eric	• Accessed Client Profile Screen
Client Profile	12/14/2010 4:49 PM	Preuss, Eric	• Accessed Client Record: "Alcohol, John, Client ID: M239724LA317121"
Client Profile	12/3/2010 2:13 PM	Preuss, Eric	• Accessed Client Profile Screen
Client Profile	12/3/2010 2:12 PM	Preuss, Eric	• Accessed Client Record: "Alcohol, John, Client ID: M239724LA317121"
Client Profile	2/23/2010 10:36 AM	Preuss, Eric	• Accessed Referral Screen for Case: 1

Activity List

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

The screenshot shows the WITS ATR Iowa Training interface. The user is logged in as Julie Jones at the Alcohol & Drug Dependency Services, ADDS. The client profile is for Jerry Stark (ID: M859488TS889100). The 'Client Activity List' table displays the following data:

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	3/11/2014	3/11/2014	Completed
	Intake Transaction	3/11/2014	3/11/2014	Completed
	GPRA Interview (Intake)	3/11/2014	3/11/2014	Completed
	GAIN-SS	3/11/2014	3/11/2014	Completed
	Consent (Beacon of Life)	6/1/2014	7/3/2014	Completed
	Referral (Beacon of Life)	7/3/2014	7/3/2014	Completed
	Consent (YMCA - DSM)	8/4/2014	8/4/2014	Completed
	Referral (YMCA - DSM)	8/4/2014	8/4/2014	Completed

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

The screenshot shows the WITS ATR Iowa Training interface for the 'ATR 3 Intake Case Information' form. The user is logged in as Julie Jones at the Alcohol & Drug Dependency Services, ADDS. The client profile is for Travis Tart (ID: M819378AT879120). The form contains the following information:

- Intake Facility: ADDS
- Intake Staff: Jones, Julie
- Initial Contact: [Redacted]
- Residence: [Redacted]
- Case #: 1
- Client ATR Funds Remaining: \$2,000.00
- Case Status: Open Active
- Initial Contact Date: [Redacted]
- Intake Date: 8/21/2014
- Problem Area: [Redacted]
- Special Initiative: Acquired Brain Disorders, Active Military/National Guard, Adult with Organic Disorder w/o SED, Child Welfare
- Special Initiative Selected: [Redacted]
- Date Closed: [Redacted]

Buttons: Cancel, Save, Finish

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. The client then selects the services and providers they feel will most benefit their recovery 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.

The screenshot shows the ATR Iowa Training homepage. At the top, there is a notification: "There are currently 5 people that have been referred in." Below this, there are three main sections: "Announcements", "Alert List", and "Schedule for:". Each section contains a table with columns for actions, dates, and other relevant information.

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**

The screenshot shows the "Referrals for Beacon of Life" search results page. It includes a search criteria section with a dropdown menu set to "Referral Created/Pending" and a search button. Below the search criteria is a table with the following data:

Actions	Unique Client #	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref To Facility	Referral Comments
	F559086AM857110	Mac, Freddie	5/15/1970	7/3/2014	Alcohol & Drug Dependency Services/ADD5	Recovery Support Services	Referral Created/Pending	Beacon of Life	
	M859077C5780110	Scarlett, Pat	8/15/1990	7/3/2014	Alcohol & Drug Dependency Services/ADD5	Recovery Support Services	Referral Created/Pending	Beacon of Life	
	M519557M5847100	Smalls, Jerry	5/1/1975	7/3/2014	Alcohol & Drug Dependency Services/ADD5	Recovery Support Services	Referral Created/Pending	Beacon of Life	
	M859488T5880100	Stark, Jerry	8/5/1994	7/3/2014	Alcohol & Drug Dependency Services/ADD5	Recovery Support Services	Referral Created/Pending	Beacon of Life	
	F589777H777100	Thomas, Jenny	5/8/1977	7/3/2014	Alcohol & Drug Dependency Services/ADD5	Recovery Support Services	Referral Created/Pending	Beacon of Life	
	M819378AT870120	Tart, Travis	8/21/1993	8/22/2014	Alcohol & Drug Dependency Services/ADD5	Recovery Support Services	Referral Created/Pending	Beacon of Life	

- Click on [Review](#) next to the selected referral
- View the referral profile

The screenshot shows the 'Referral' profile for Client: Tart, Travis. The 'Referred By' section includes details like Agency (Alcohol & Drug Dependency Services), Facility (ADDS), Staff Member (Jones, Julie), and Program (ADDS/ATR 3). The 'Referred To' section includes Signed Consents (Beacon of Life), Agency (Beacon of Life), and Program (ATR 3). A dropdown menu is open over the 'Referral Status' field, which is currently set to 'Referral Created/Pending'. The dropdown options include 'Placed/Accepted', 'Referral Created/Pending', 'Referred Terminated', 'Refused Treatment', 'Rejected by Program', and 'Wait List'. Buttons for 'Cancel' and 'Finish' are located at the bottom right of the form.

- Change the Referral Status to Placed/Accepted
- Click **Finish**

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

The screenshot shows the 'Profile' page for Client: Thomas, Jenny. The 'Profile' section includes fields for First Name (Jenny), Middle Name, Last Name (Thomas), Mother's Maiden Name, Gender (Female), DOB (5/8/1977), SSN, and Driver's License. It also shows Provider Client ID, Unique Client Number, State Client ID, Record Created By (Jones, Julie), Last Updated By (Jones, Julie), Created Date (8/22/2014 2:48 PM), and Last Updated Date (8/22/2014 2:48 PM). Below the profile is an 'Administrative Actions' section with 'Cancel', 'Save', and 'Finish' buttons. At the bottom, there are tables for 'Alternate Names' and 'Addresses'.

- When the Client Profile screen appears, you may review the client information
- 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.

Actions	Voucher #	Payer	Status	Effective Date	End Date	Vouched Amount	Encumbered	Expended	Available	Last Activity Date
	1485	ATR3 [ATR3, ATR3-421253088]	Pending	7/3/2014	9/29/2014	\$200.00	\$0.00	\$0.00	\$200.00	8/22/2014

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)

ATR Iowa Training
Logout

User: Jones, Julie | Location: Beacon of Life, Beacon of Life

Client: Thomas, Jenny | F589777HT777100 | 1 Clear Client

- Home Page
- Agency
- Client List
- Client Profile
 - Alternate Names
 - Additional Information
 - Contact Info
 - Collateral Contacts
 - Other Numbers
 - History
 - Voucher
 - Allergies
- Gain Short Screener
- Linked Consents
- Activity List
- Episode List
- System Administration
- My Settings
- Reports
- Support Ticket

Voucher

Group Enrollment	ATR3	Status	Pending
Plan	ATR3	Agreement	ATR3-421253088 - Beacon of Life / 12/1/2010 - 9/30/2014 - ATR3-ATR3
Voucher #	1485	Date Approved	7/3/2014
Administering Agency	Alcohol & Drug Dependency Services	Updated Date	8/22/2014 2:48 PM
Effective Date	7/3/2014	Updated By	Jones, Julie
End Date	9/29/2014	ATR Intake	7/3/2014-Beacon of Life

Service	Vouched Units	Vouched Amount	Encumbered	Expended	Available Amount	Available Units
Housing Assistance	200	\$200.00	\$0.00	\$0.00	\$200.00	200.00

Actions

Total Vouched: \$200.00

Total Encumbered: \$0.00

Total Expended: \$0.00

Total Available: \$200.00

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)

Home Page	Voucher List										
Agency	Actions	Voucher #	Payor	Status	Effective Date	End Date	Vouchered Amount	Encumbered	Expended	Available	Last Activity Date
Client List		1485	ATR3 [ATR3, ATR3-421253088]	Active	7/3/2014	9/29/2014	\$200.00	\$0.00	\$0.00	\$200.00	8/22/2014
Client Profile											
Alternate Names											
Additional Information											
Contact Info											
Collateral Contacts											
Other Numbers											
History											
Voucher											

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](#)

Actions	Close	Total Vouched:	\$80.00
		Total Encumbered:	0.00
		Total Expended:	0.00
		Total Available:	\$80.00
		Finish	

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 screenshot shows the 'ATR Iowa Training' software interface. The top navigation bar includes the WITS logo, the text 'ATR Iowa Training', and a 'Logout' button. Below the navigation bar, the user's name 'User: Jones, Julie' and the location 'Location: Alcohol & Drug Dependency Services, ADDS' are displayed. The main content area is titled 'Encounter' and contains several input fields. The 'Service' field is highlighted in yellow. Other fields include 'ENC ID', 'Created Date', 'Program Name' (set to 'ADD5/ATR 3 - 12/1/2010 -'), 'Start Date', 'End Date', 'Start Time', 'End Time', 'Duration', and '# of Service Units/Sessions' (highlighted in yellow). The 'Rendering Staff' field is set to 'Jones, Julie'. There are two text areas for 'Unsigned Notes' and 'Signed Notes'. A 'Sign Note' button and an 'Allow Disclosure?' dropdown menu are also present. At the bottom, there are 'Administrative Actions' including 'Release to Billing' and three buttons: 'Cancel', 'Save', and 'Finish'.

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.

The screenshot displays the 'Encounter Search' and 'Encounter List' sections of a software interface. On the left is a navigation menu with options like Agency, Client List, Client Profile, Gain Short Screener, Linked Consents, Activity List, Intake, GPRA, Service Summary, Consent, Referrals, Encounters, Profile, and Notes. The main area shows search filters for Start Date (8/22/2013), End Date (8/22/2014), Rendering Staff, Service, and Encounter Status. Below the search filters is a table titled 'Encounter List' with columns: Actions, Svc Date, Service, ENC ID, Rendering Staff, Program Name, and Status. One record is visible with Svc Date 8/22/2014, Service Housing Assistance, ENC ID 1057, Rendering Staff Jones, Julie, Program Name ATR 3, and Status Released. There are 'Clear' and 'Go' buttons next to the search filters, and an 'Add Encounter Record' link at the top right of the table.

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**.

The screenshot displays the ATR Iowa Training web application interface. The top navigation bar includes the WITS logo, the text "ATR Iowa Training", and a "Logout" button. Below the navigation bar, the user's name "User: Jones, Julie" and location "Location: Alcohol & Drug Dependency Services, ADDS" are shown. The main content area is divided into a left sidebar and a main panel. The sidebar contains a "Home Page" link and a "Billing" section with sub-links: "Claim Item List", "Claim Batch List", "Encounter List", "EOB Transaction List", "Payment List", "Billing Transaction List", "Client Balance", "Payor Plan List", "Voucher List", "Agreement Management", "Client List", "System Administration", "My Settings", and "Reports". The main panel is titled "Claim Item Search" and contains several search criteria fields: "Plan", "Client First Name", "Subscriber/Resp Party First Name", "Subscriber/Resp Party Account #", "Voucher #", "Item Status", "Add-On Level", "Group Enrollment", "Client Last Name", "S/R Party Last Name", "Rendering Staff", "ENC ID", "Charge", "Service", "Service Date", and "Facility". There are "Clear" and "Go" buttons. Below the search fields is a "Claim Item List (Export)" button and a table with columns: "Actions", "Item #", "Level", "Service Date", "Service", "Duration", "Status", "Release Date", and "Charge". A dropdown menu is open over the "Item Status" field, showing options: "All Awaiting Review", "Awaiting Review", "Awaiting Review-Possible", "Duplicate", "Awaiting Review-Insufficient Funds", "Hold", "Released", and "Batched".

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.

Profile for Claim Item # 824 for Jones, Katie

ENC ID: 829	Delivered Service: 3040
Program: ATR 3	Service Start: 1/11/2011 12:00 AM
Diagnoses: / /	Service End: 1/11/2011 12:00 AM
Pregnant:	Duration:
Status: Batched	# Sessions/Units: 1
	Rendering Staff: Preuss, Eric

Service Fee		Cost Center
Billing Units	1.00 X Rate / Unit \$8.00 = \$8.00	Billing Note
Group Enrollment	ATR3 [ATR3, ATR3 - 420938934]	Encounter Post Date 1/11/2011
Plan	ATR3	Created Date 1/11/2011 3:50 PM
Payor Billing Service	Care Coordination: 3040	
Service Location		
Unit Desc	1 unit =	
Authorization	1148-3040	Available 48.00
Available to pay this claim item:	48.0000	
Administrative Actions		
Reverse Adjust		
Claim # 752	Claim Batch # 344	Claim Batch Created Date 1/11/2011 4:15 PM
Finish		

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

The screenshot shows the ATR Iowa Training web application interface. At the top, there is a navigation bar with the WITS logo, the text "ATR Iowa Training", and a "Logout" button. Below the navigation bar, the user information "User: Jones, Julie" and "Location: Alcohol & Drug Dependency Services, ADDS" is displayed. The main content area is divided into a left sidebar and a main panel. The sidebar contains a "Home Page" link and a "Billing" section with various sub-links including "Agency List", "Staff List", "System Usage", "Client Survey", "Claim Item List", "Claim Batch List", "Encounter List", "EOB Transaction List", "Payment List", "Payment Profile", "Billing Transaction List", "Client Balance", "Payor Plan List", "Voucher List", "Agreement Management", "Alerts Configuration", "Client List", "System Administration", "My Settings", "Reports", and "Support Ticket". The main panel is titled "Payment Search" and contains several input fields: "Payor Plan" (dropdown), "Pmt #", "Payment Amount", "Contractor" (dropdown), "First Name", "Last Name", "Posted Date" (with a date picker showing 8/1/14-8/31/14), and "Reference". There are "Clear" and "Go" buttons. Below the search fields is a "Payment List (Export)" table with columns for "Actions", "Pmt #", "Payor Name", "Posted", "Payment Amount", "Unapplied Amount", "Intended For", and "Created By". The table is currently empty. At the bottom of the main panel, there is a "Total Payment" field showing "\$0.00".

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

17.1.0

 **ATR Iowa Training** ☰ Logout

User: Jones, Julie | Location: Alcohol & Drug Dependency Services, ADDS 📷 Snapshot

Home Page | **Claims Reconciliation**

▸ Agency | Agency: Alcohol & Drug Dependency Services

▸ Client List | Action:

▸ System Administration | Payor:

▸ My Settings | Adjudication:

Reports | Batch Id:

Support Ticket | Invoice File:

Id:

Claim Item #:

Client First Name:

Client Last Name:

Last 4 digits of Client Identification:

Start Date: 📅

End Date: 📅

Adjudicated Date: From 08/01/2014 📅 To 08/31/2014 📅

Payor Plan Name: