HI-WITS Training: Add A New Client

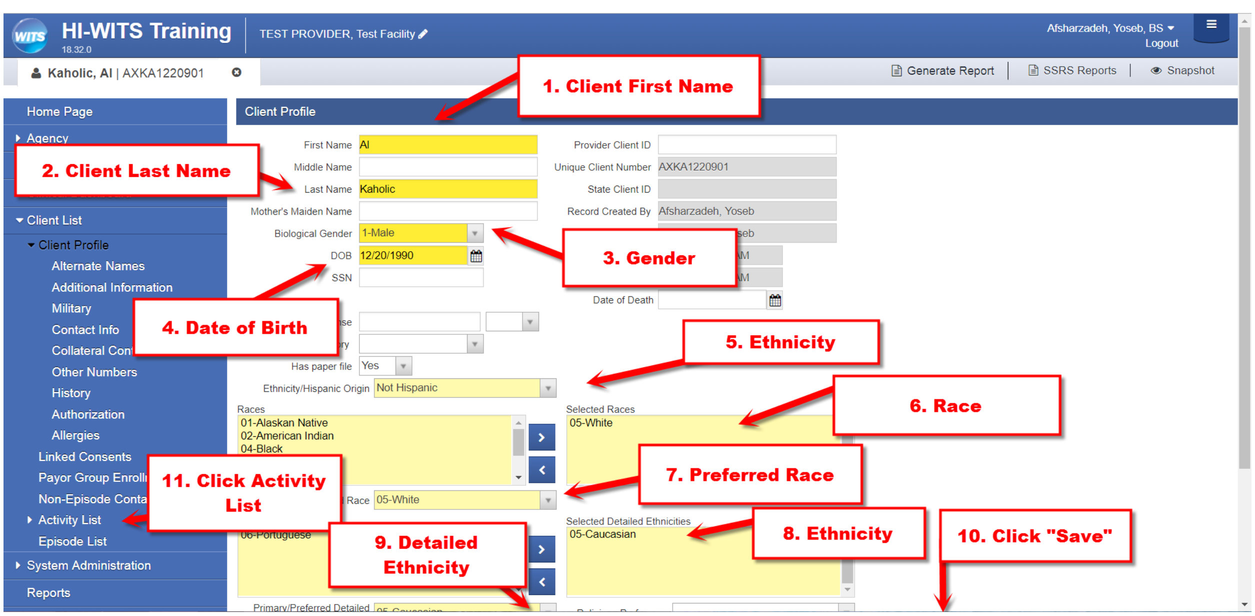
Lesson 1

Situation: In this training Clinical Staff will learn how to Create A New Client, Add Payor Group Enrollment, Add Pre-Treatment Program Enrollment, Add Authorization for Pre-Treatment, Create Encounters for Assessment (H0001/R1), Placement Determination (T1023/R0) and Screening (H0002/R0) and Release to Billing.

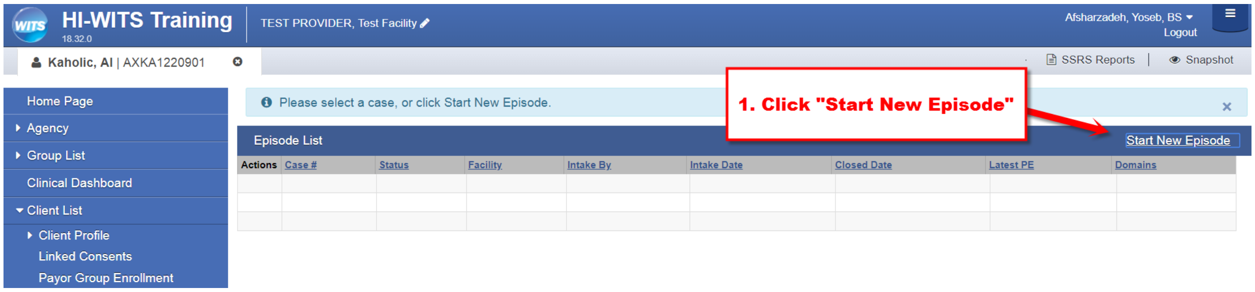
Note: All Clients should be "Adult" and All Payor Group Enrollment is "Click ProfileADAD 18-XXX" ADAD 18-XXX Test Provider Choose Funding Source Adult GEN1 or Adult SABG1.

1. Check Client List to Determine Client is not a Duplicate.

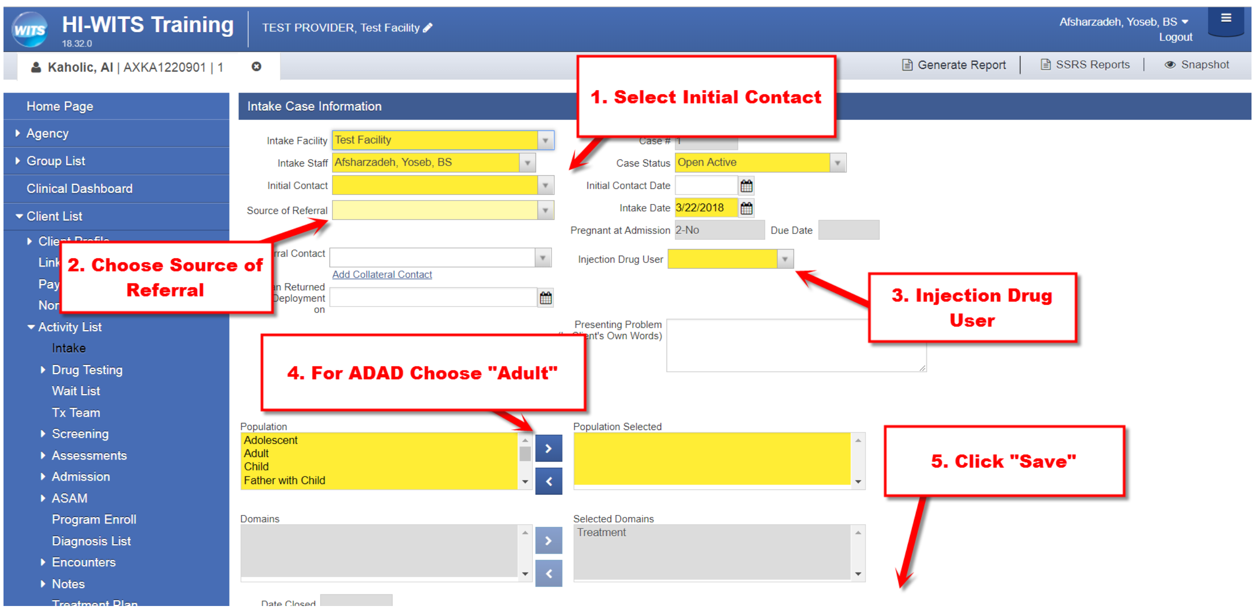
2. Fill in ALL Yellow Fields on Client Profile Screen, Save then Click Activity List



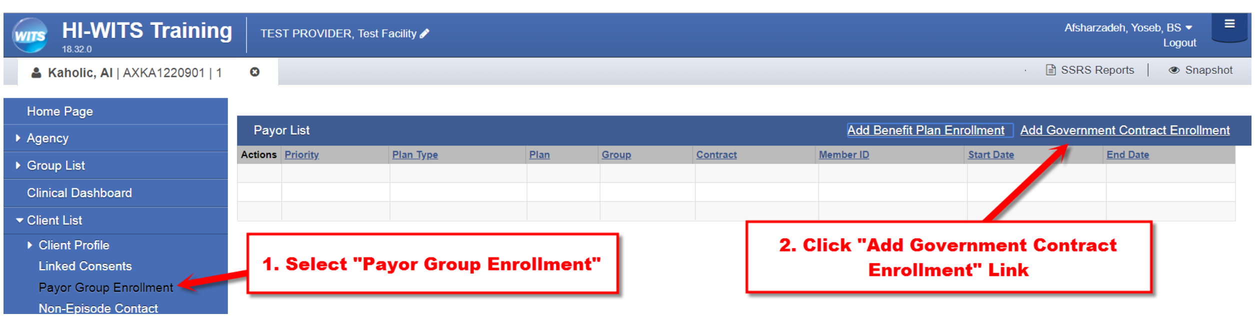
3. Click Start New Episode to Proceed to Intake Screen



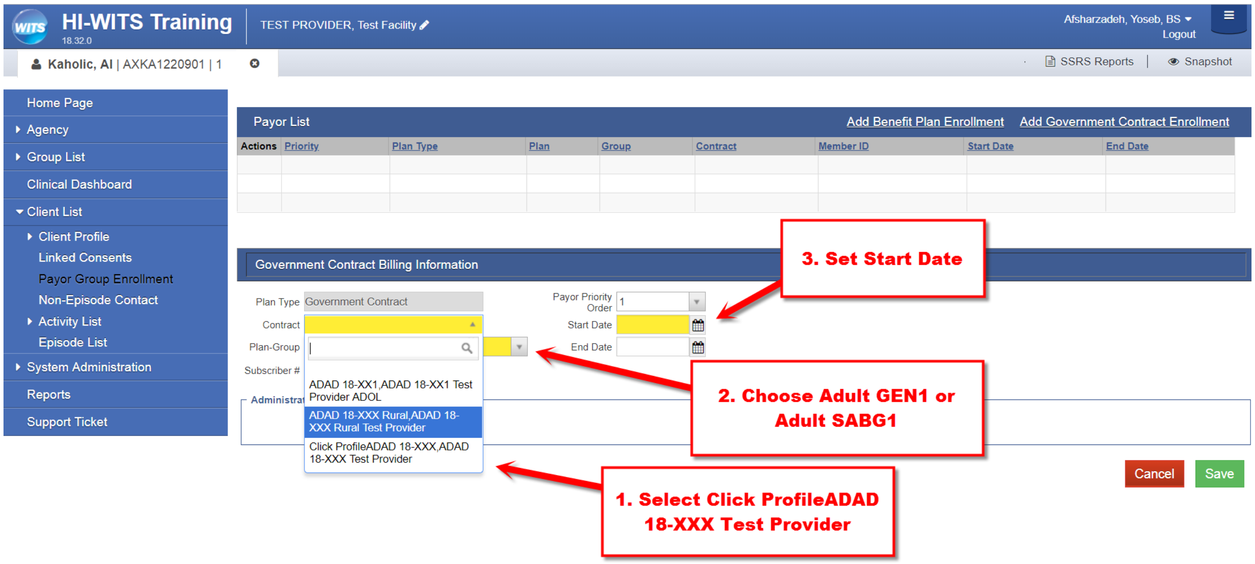
4. Fill in ALL Yellow Fields on Intake Screen



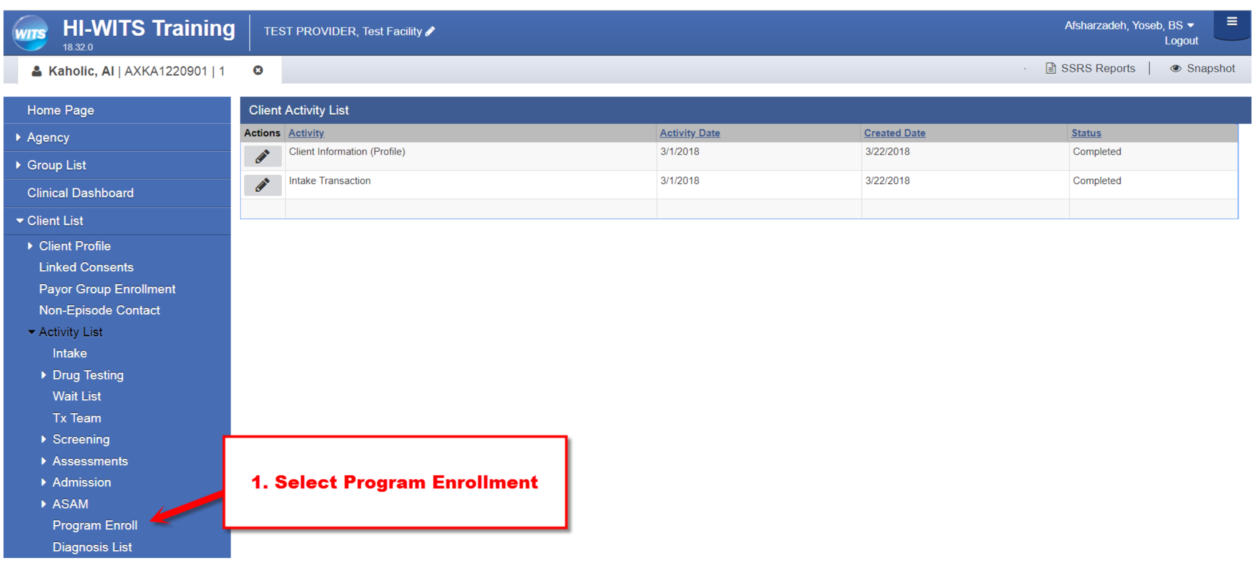
5. Select Payor Group Enrollment from the Left Menu Pick then Click Link to Add Government Contract Enrollment



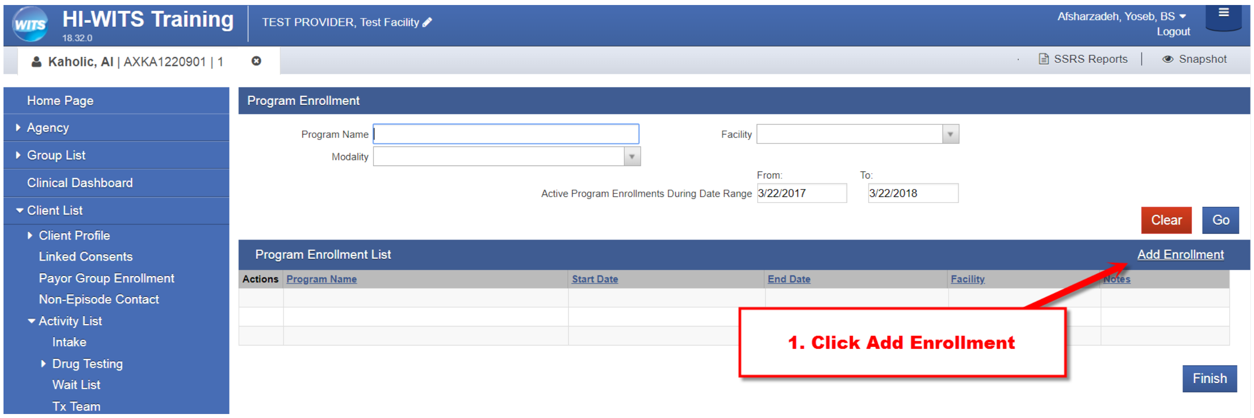
6. Choose “Click ProfileADAD 18-XXX” Contract, Select Adult GEN1 or Adult SABG1 for Plan-Group (Funding Source) ONLY. Then Click “Save”



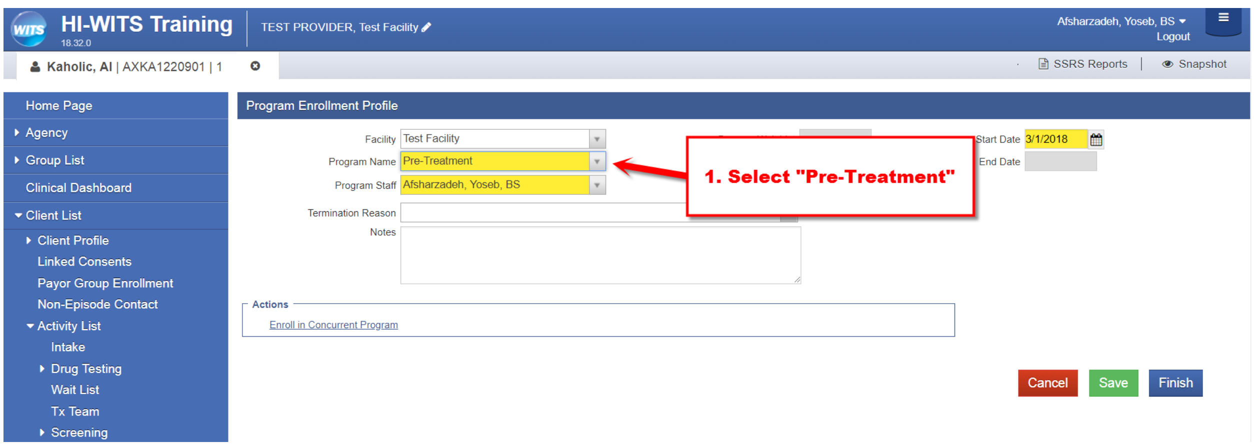
7. Select Program Enrollment from the Left Menu Pick

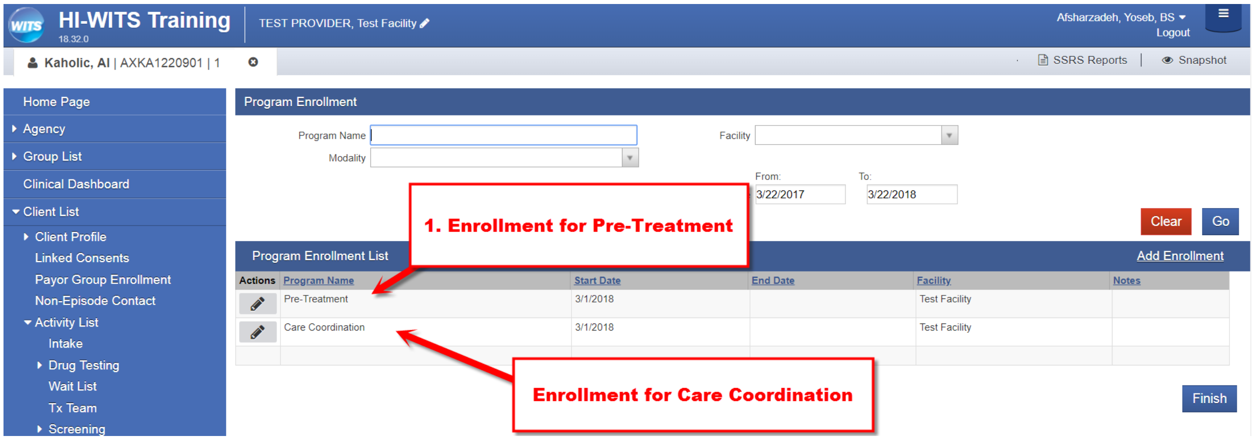


8. Click Add Enrollment Link

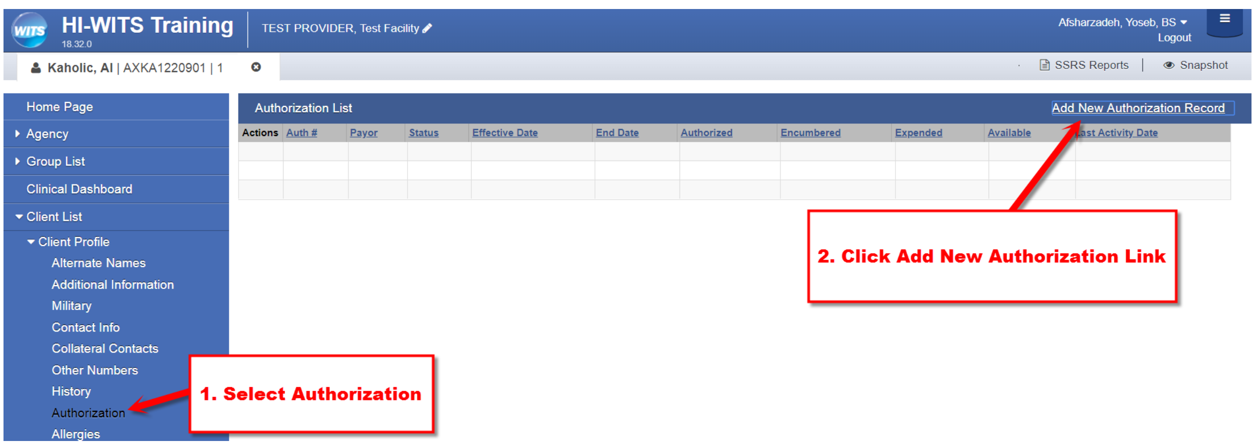


9. Add two New Program Enrollments, one Program for "Pre-Treatment" and another for "Care Coordination"

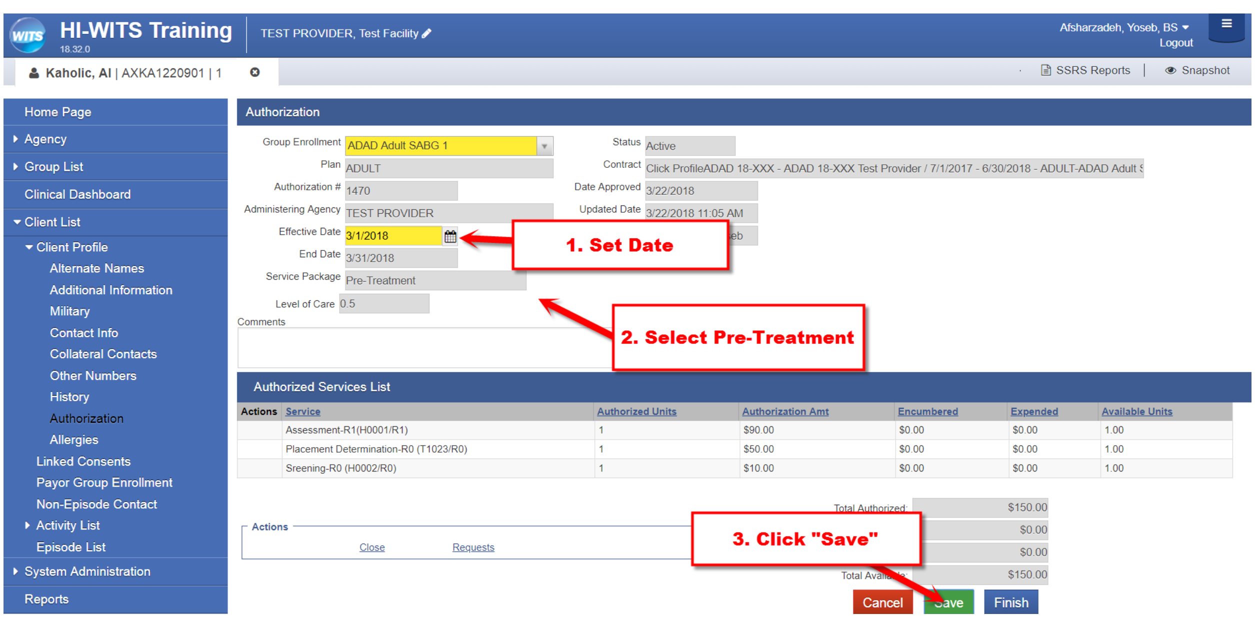




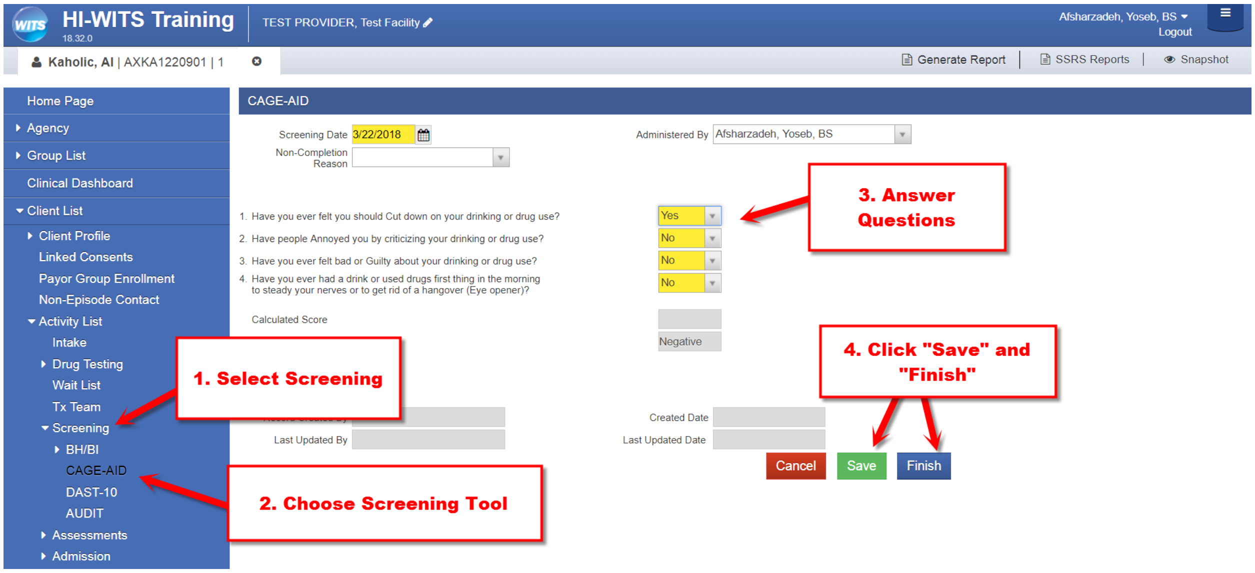
10. Select Authorization Under Client Profile from the Left Menu Pick. Click Add New Authorization Record Link



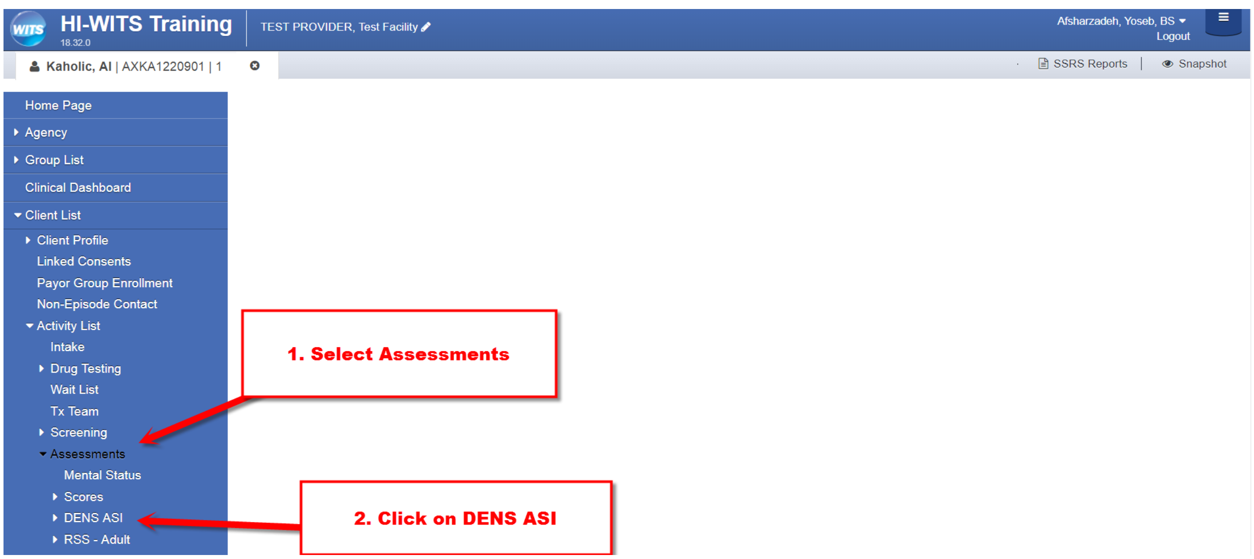
11. Add Authorization for Pre-Treatment

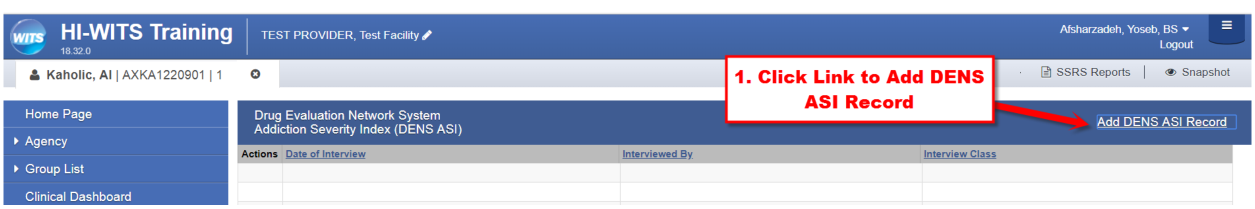


12. Select Screening from the Left Menu Pick. Choose Preferred Screening Tool and Complete.

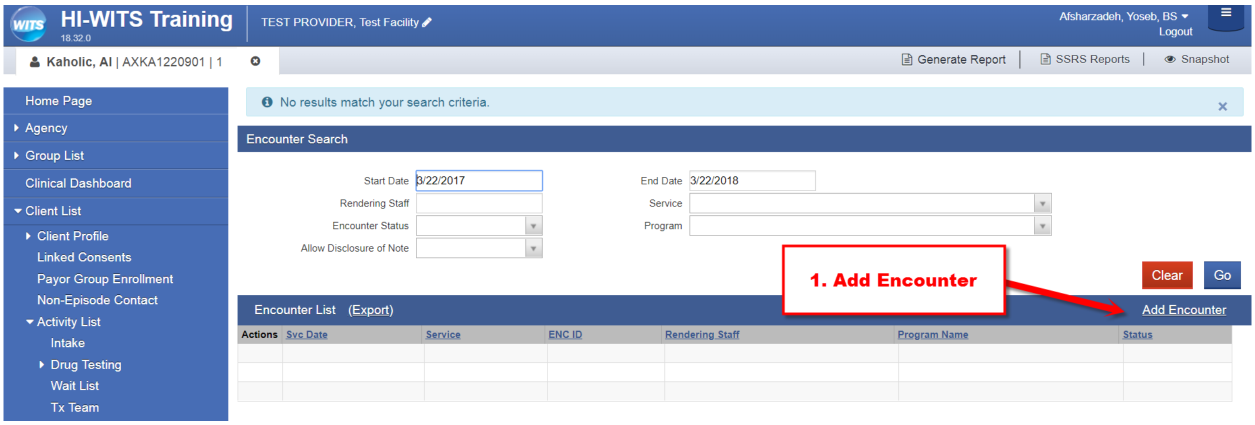


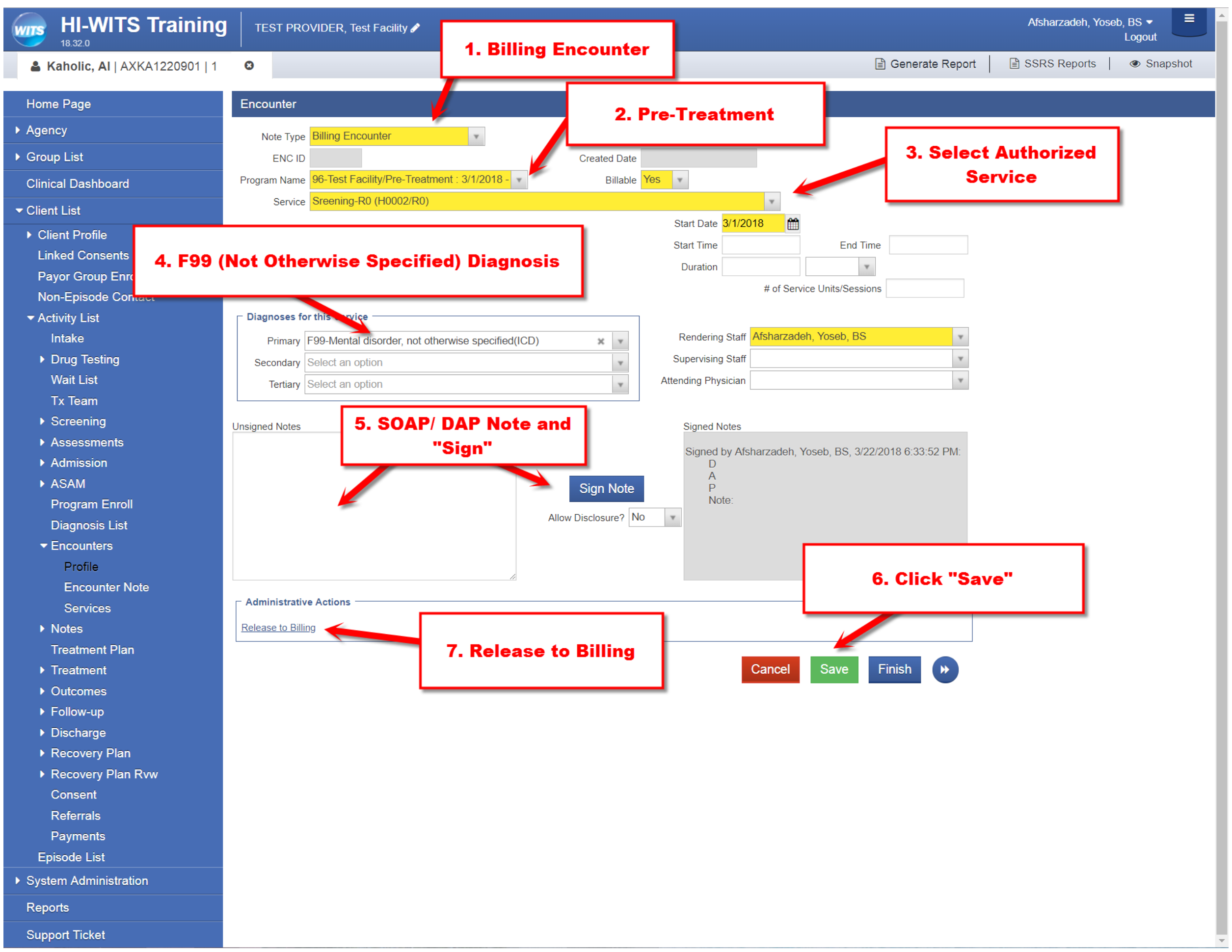
13. Under Assessments on the Left Menu Pick, Choose DENS ASI and Complete





14. Add three (3) Separate Encounters for: Screening (H0002/R0), Assessment (H0001/R1) and Placement Determination (T1023/R0) All Under Pre-Treatment Modality Release to Billing





15. Create All Three (3) Encounters and Release to Billing. Encounter List Should Look Like This Below: