

Adding Client to Rural Remote/ Capitated Rates

Situation: This Documentation Demonstrates how to Add a New Client to the New Contract

Note: ADAD will Require Client to be Placed in Correct Acuity Level for Clinical and billing Purposes

1. Under Client List on the Menu pick Click Add New Client Link

The screenshot shows the HI-WITS Training web application interface. The top navigation bar includes the WITS logo, the text 'HI-WITS Training 18.25.2', the user role 'TEST PROVIDER, Main Office', the user name 'Afsharzadeh, Yoseb, BS', and a 'Logout' button. Below the navigation bar is a sidebar menu with options: Home Page, Agency, Group List, Clinical Dashboard, Client List (selected), Client Profile, Linked Consents, Payor Group Enrollment, Non-Episode Contact, Activity List, Episode List, System Administration, Reports, and Support Ticket. The main content area is titled 'Client Search' and contains several input fields: Agency (TEST PROVIDER), Facility (Main Office), First Name, Last Name, SSN, and DOB. There are also dropdown menus for 'Primary Care Staff' and 'Intake Staff', and a 'Number Type' dropdown. A 'Clear' button and a 'Go' button are located below the search fields. Below the search area is a 'Client List' table with columns for 'Actions', 'Unique Client #', 'Full Name', 'DOB', 'SSN', and 'Gender'. An 'Add Client' link is located in the top right corner of the table. Two red callout boxes are present: one pointing to the 'Client List' menu item with the text '1. Select Client List', and another pointing to the 'Add Client' link with the text '2. Click Add New Client Link'.

2. Fill Out All Yellow Required Fields, Then Click Activity List From the Left Menu Pick

The screenshot shows the 'Client Profile' form in the WITS system. The form contains various fields, some of which are highlighted in yellow to indicate they are required. Red dashed arrows point from numbered callout boxes to these fields. The callouts are:

- 1. Add First and Last Name**: Points to the 'First Name' (Eric) and 'Last Name' (Cartman) fields.
- 2. Add Gender and Date of Birth**: Points to the 'Biological Gender' (1-Male) and 'DOB' (12/20/1974) fields.
- 3. Select Race and Ethnicity**: Points to the 'Ethnicity/Hispanic Origin' (Not Hispanic), 'Selected Races' (05-White), and 'Selected Detailed Ethnicities' (05-Caucasian) dropdown menus.
- 4. Veteran Status**: Points to the 'Veteran Status' (2-No) dropdown menu.
- 5. Click Save**: Points to the green 'Save' button at the bottom of the form.
- 6. Activity List**: Points to the 'Activity List' link in the left-hand navigation menu.

At the bottom of the form, there are buttons for 'Cancel', 'Save', and 'Finish'. The 'Administrative Actions' section is also visible.

3. Click Start New Episode Link

The screenshot shows the 'Episode List' page in the WITS system. A message at the top says 'Please select a case, or click Start New Episode.' Below this is a table with columns: 'Actions', 'Case #', 'Status', 'Facility', 'Intake By', 'Intake Date', 'Closed Date', 'Latest PE', and 'Domains'. A red dashed arrow points from a callout box to the 'Start New Episode' link in the top right corner of the table area.

1. click Start New episode Link

4. Fill Out Required Fields on Intake Case Information Screen, Click “Save”

The screenshot shows the 'Intake Case Information' form in the HI-WITS Training system. The interface includes a top navigation bar with the user's name 'Cartman, Eric' and the case ID 'EXCA1220741 | 1'. A left sidebar contains a menu with options like 'Home Page', 'Agency', 'Group List', 'Clinical Dashboard', and 'Client List'. The main form area is titled 'Intake Case Information' and contains several fields:

- 1. Initial contact:** A dropdown menu set to 'Walk-in'.
- 2. Source of Referral:** A dropdown menu set to '01-Individual (self)'.
- 3. Intake date:** A date field set to '9/1/2017'.
- 4. Injection Drug Indicator:** A dropdown menu set to 'No'.
- 5. Set Client Population:** A dropdown menu set to 'Adult'.
- 6. Click "Save":** A callout pointing to the 'Save' button at the bottom of the form.

Other visible fields include 'Intake Facility' (Main Office), 'Intake Staff' (Afsharzadeh, Yoseb, BS), 'Case # 1', 'Case Status' (Open Active), 'Initial Contact Date', 'Pregnant at Admission' (2-No), 'Due Date', 'Referral Contact', 'Veteran Returned from Deployment on', 'Presenting Problem', 'Population Selected', 'Selected Domains', and 'Date Closed'. At the bottom, there are 'Cancel', 'Save', and 'Finish' buttons.

5. Under Client Profile Select Program Enrollment Link from Left Menu Pick

The screenshot shows the HI-WITS Training interface. The left sidebar menu is expanded to 'Client List', and 'Program Enroll' is selected, indicated by a red arrow and a callout box: "1. Select Program Enrollment". The main content area is titled 'Program Enrollment' and contains search filters for Program Name, Facility, and Modality, along with date range selection (From: 9/18/2016, To: 9/18/2017). Below these filters is a table for the 'Program Enrollment List' with columns for Actions, Program Name, Start Date, End Date, Facility, and Notes. An 'Add Enrollment' button is located at the top right of the table area, highlighted with a red arrow and a callout box: "2. Click Add Enrollment Link". Other buttons like 'Clear', 'Go', and 'Finish' are also visible.

6. For Rural Remote Choose Care Coordination Program as well as intended Level of Care

The screenshot shows the HI-WITS Training interface for the 'Program Enrollment Profile' page. The left sidebar menu is expanded to 'Client List', and 'Program Enroll' is selected. The main content area shows the profile details for a program. The 'Program Name' dropdown is set to 'Care Coordination', highlighted with a red arrow and a callout box: "Care Coordination". Other dropdowns include 'Facility' (Lanai Office) and 'Program Staff' (Afsharzadeh, Yoseb, BS). There is a 'Termination Reason' dropdown and a 'Notes' text area. At the bottom, there is an 'Actions' section with a link 'Enroll in Concurrent Program' and buttons for 'Cancel', 'Save', and 'Finish'.

7. Add the Correct Program to Match the Level of Care Needed

HI-WITS Training | TEST PROVIDER, Main Office | Afsharzadeh, Yoseb, BS | Logout

Cartman, Eric | EXCA1220741 | 1 | SSRS Reports | Snapshot

Home Page

- Agency
- Group List
- Clinical Dashboard
- Client List
 - Client Profile
 - Linked Consents
 - Payor Group Enrollment
 - Non-Episode Contact
 - Activity List
 - Intake
 - Drug Testing
 - Wait List
 - Tx Team
 - Screening
 - Assessments
 - Admission
 - ASAM
 - Program Enroll
 - Diagnosis List
 - Encounters
 - Notes
 - Treatment Plan
 - Treatment
 - Outcomes
 - Follow-up
 - Discharge
 - Recovery Plan
 - Recovery Plan Rvw
 - Consent
 - Referrals
 - Payments
 - Episode List
 - System Administration
 - Reports
 - Support Ticket

Program Enrollment Profile

Facility: Main Office | Days on Wait List: | Start Date: 9/1 | End Date: |

Program Name: Pre-Treatment

Program Staff: Afsharzadeh, Yoseb, BS

Termination Reason: | Notes: |

Actions: Enroll in Concurrent Program

Buttons: Cancel, Save, Finish

1. Select Correct Program "Level of Care"

2. Click Save / Finish

8. Under Client Profile select Payor Group Enrollment, then Select Add New Government Contract enrollment

HI-WITS Training | TEST PROVIDER, Main Office | Afsharzadeh, Yoseb, BS | Logout

Ant, Adam | AXAN1220741 | 1 | SSRS Reports | Snapshot

Home Page

- Agency
- Group List
- Clinical Dashboard
- Client List
 - Client Profile
 - Linked Consents
 - Payor Group Enrollment
 - Non-Episode Contact
 - Activity List
 - Episode List
 - System Administration
 - Reports
 - Support Ticket

Payor List

Actions: Add Benefit Plan Enrollment | Add Government Contract Enrollment

Actions	Priority	Plan Type	Plan	Group	Contract	Member ID	Start Date	End Date
	1	Government Contract	ADAD Federal-State Funds	ADAD Adults-Oahu	Test Provider Adult, Dual and ICM	AXAN1220741	6/2/2017	

1. Click Payor Group Enrollment

2. Click Link to Add Government Contract Enrollment

9. For Rural Remote Choose

Home Page
Agency
Group List
Clinical Dashboard
Client List
Client Profile
Linked Consents
Payor Group Enrollment
Non-Episode Contact
Activity List
Episode List
System Administration
Reports
Support Ticket

Actions	Priority	Plan Type	Plan	Group	Contract	Member ID	Start Date	End Date
	1	Government Contract	ADAD Rural Remote	ADAD IACC SABG 1	ADAD 18-XXX Test Provider	JXPE1220741	9/1/2017	

New Contract 18-XXX

Rural Remote and Funding Source

10. Set Parameters for Payor Group Enrollment

Home Page
Agency
Group List
Clinical Dashboard
Client List
Client Profile
Linked Consents
Payor Group Enrollment
Non-Episode Contact
Activity List
Episode List
System Administration
Reports
Support Ticket

Actions	Priority	Plan Type	Plan	Group	Contract	Member ID	Start Date	End Date
	1	Government Contract	ADAD Federal-State Funds	ADAD Adults-Oahu	Test Provider Adult, Dual and ICM	AXAN1220741	6/2/2017	

1. Select Current ADAD Contract

2. Select ADAD Approved Funding Source

3. Select Start Date

4. Click "Save"

11. Rural Remote and Capitated Clients will not Require an Authorization Record

12. Create Encounter to Track Clinical Services

Encounter

Note Type: Progress Notes
ENC ID: 5726
Created Date: 10/11/2017 10:32 AM

Program Name: 17-Lanai Office/Outpatient Services : 10/1/2017 - **Clinical Level of Care**
Billable: No **Set to No**

Service: Individual Counseling (H0004)
Start Date: 10/2/2017
Start Time: 9:00 AM
End Time: 10:00 AM
Duration: 60 Min
of Service Units/Sessions: 1

Service Location: Special Facility Other

Diagnoses for this Service

Primary	F10.20-Alcohol dependence, uncomplicated(ICD)	x
Secondary	F12.20-Cannabis dependence, uncomplicated(ICD)	x
Tertiary	Select an option	

Rendering Staff: Afsharzadeh, Yoseb, BS
Supervising Staff:
Attending Physician:

Unsigned Notes: [Empty text area]
Signed Notes: Signed by Afsharzadeh, Yoseb, BS, 10/11/2017 4:32:33 PM: DAP / SOAP Note
Sign Note

13. Create Billing Encounter

Encounter

Note Type: **Progress Notes** **Care Coordination**

ENC ID: 5726 ADAD IACC SABG 1[ADAD]

Program Name: Lanai Office/Care Coordination : 9/1/2017 - Billable: Yes

Service: **Rural Adult Services HC/R0 (H0047/HC/R0)** **Rural Sub-Category Code**

Service Location: Special Facility Other

Start Date: 10/2/2017

Start Time: 9:00 AM End Time: 10:00 AM

Duration: 60 Min # of Service Units/Sessions: 1

Diagnoses for this Service

Primary	F10.20-Alcohol dependence, uncomplicated(ICD)	x	v
Secondary	F12.20-Cannabis dependence, uncomplicated(ICD)	x	v
Tertiary	Select an option		v

Rendering Staff: Afsharzadeh, Yoseb, BS

Supervising Staff:

Attending Physician:

Unsigned Notes

Signed Notes

Signed by Afsharzadeh, Yoseb, BS, 10/11/2017 4:32:33 PM:
DAP / SOAP Note

Sign Note

Allow Disclosure? No

14. Release to Billing

Diagnoses for this Service

Primary	F10.20-Alcohol dependence, uncomplicated(ICD)	x	v
Secondary	F12.20-Cannabis dependence, uncomplicated(ICD)	x	v
Tertiary	Select an option		v

Rendering Staff: Afsharzadeh, Yoseb, BS

Supervising Staff:

Attending Physician:

Unsigned Notes

Signed Notes

Signed by Afsharzadeh, Yoseb, BS, 10/11/2017 4:41:57 PM:
DAP / SOAP Note

Sign Note

Allow Disclosure? No

Administrative Actions

Release to Billing Delete

Click Release to Billing then Finish

Cancel Save Finish

15. Notice Status is set to Released

The screenshot shows the HI-WITS Training interface. At the top, the user is logged in as Afsharzadeh, Yoseb, BS. The main navigation menu on the left includes options like Home Page, Agency, Group List, Clinical Dashboard, Client List, Client Profile, Linked Consents, Payor Group Enrollment, Non-Episode Contact, Activity List, Intake, Drug Testing, Wait List, Tx Team, Screening, and Assessments. The main content area is titled 'Encounter Search' and contains search filters for Start Date (10/11/2016), End Date (10/11/2017), Rendering Staff, Service, Encounter Status, and Program. Below the search filters is an 'Encounter List' table with columns for Actions, Svc Date, Service, ENC ID, Rendering Staff, Program Name, and Status. The table contains two rows of data, both with a 'Released' status. A red arrow points from a red-bordered box labeled 'Released Status' to the 'Released' status cell in the second row of the table.

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Status
	10/2/2017	Rural IACC Services H9/R0 (H0047/H9/R0)	5726	Afsharzadeh, Yoseb, BS	Care Coordination	Released
	9/1/2017	Rural IACC Services H9/R0 (H0047/H9/R0)	5702	Afsharzadeh, Yoseb, BS	Care Coordination	Released

If you have any questions, please call the WITS Staff or email WITSHelp@doh.hawaii.gov.