Voucher Management System

(VMS)

USER MANUAL

April 2011

A program of
State of California – Health and Human Services Agency
DEPARTMENT OF ALCOHOL AND DRUG PROGRAMS

Prepared by:
MAXIMUS, Inc.

The following instructions are organized to represent a normal episode progression from creating/enrolling a client in the VMS to closing the treatment episode.

VMS User Manual

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Section I

Overview

This manual covers only VMS related topics and **all ATR policy requirements precede these instructions.**

Order of VMS Requirements:

1. A Client must be assigned a *Client ID* before an *Episode* or voucher can be requested.
2. Once a *Client ID* is assigned, an *Episode* and an *Assessment* voucher may be requested.
3. Once an *Episode* and an *Assessment* voucher have been opened (approved), the Case Manager then makes a request for the *Case Management* voucher.
4. Once the *Case Management* voucher is approved, an *Intake GPRA* may be entered.
5. A provider may not bill until an *Intake GPRA* has been completed in the VMS.
6. Treatment and/or RSS vouchers may not be requested until an *Intake GPRA* is entered and a *Case Management* voucher is assigned to the client.
7. Voucher changes/extensions may not be requested once a *Discharge GPRA* has been entered.
8. The VMS requires at least one service be billed before a *Discharge GPRA* can be completed.
9. The *Discharge GPRA* and *6-month Follow-up GPRA* can be completed in either order.

Section II

How to Assign a Client ID

(Completed by the assessor only)

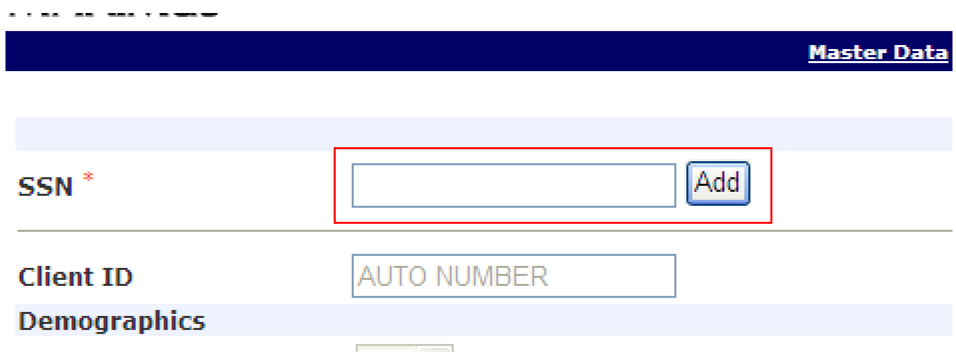
A Client ID is what identifies an individual in the VMS.

- *A client may have already been enrolled with the same SSN. If this occurs, the VMS will provide the user with the Client ID already assigned.*
- *If two providers enroll the same client with different SSN numbers, the VMS will issue them both a Client ID. This duplication will not be recognized until a voucher or Episode request has been made. The Call Center will deem the first requested Client ID usable and the second will be flagged "DO NOT USE, DUPLICATE, SEE XXXXXXXX". (X will be replaced with the usable Client ID)*
- *If the individual cannot or will not produce his/her SSN, the assessor must use the following formula as a substitute (in this exact order): last two digits of the year of birth, two digit day of birth, two digit month of birth (YYDDMM); first letter of first name, and first two letters of last name. (Example: John Smith, born 07/05/1988 would be 880507JSM.)*

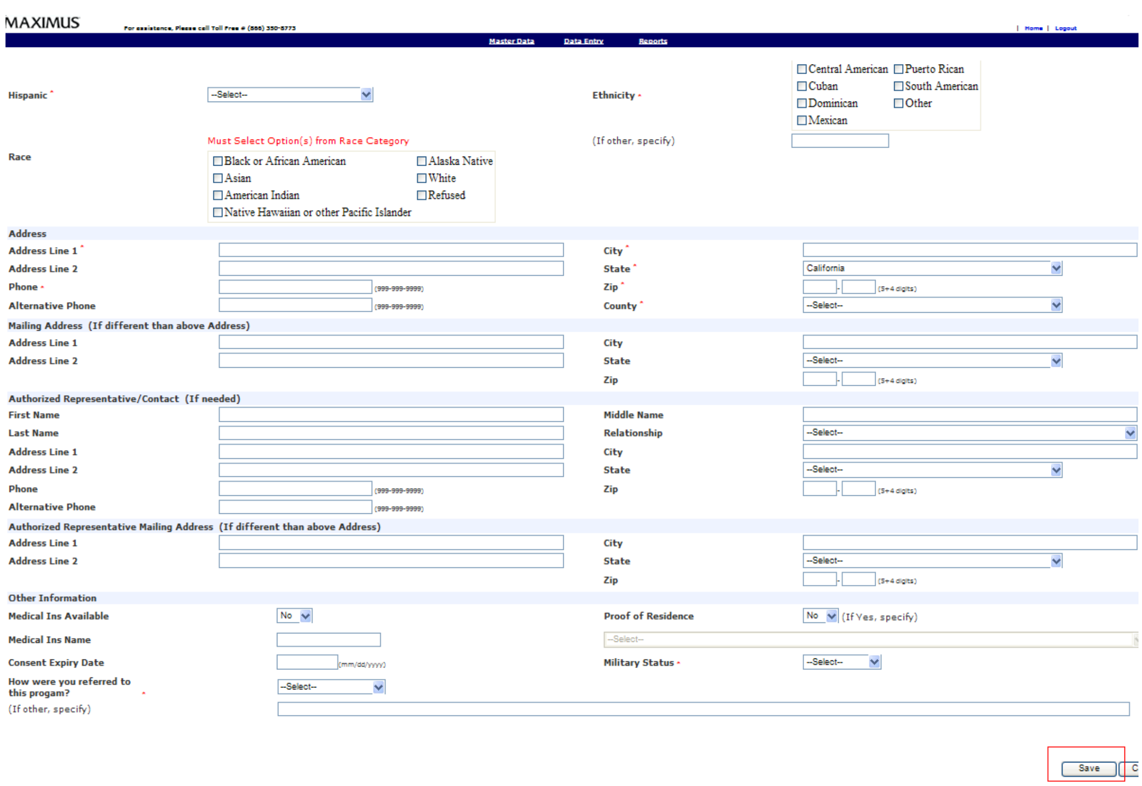
<u>Instructions</u>

1. **Hover the cursor over Master Data and choose Create Client from the dropdown menu.**

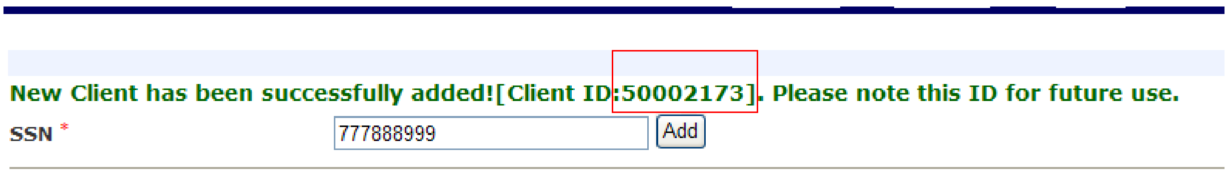
2. Enter the client's SSN in the text box and select the Add button.



3. Fill out (at least) all required details (marked with *) and select the Save button.



4. Record the Client ID number in your files!



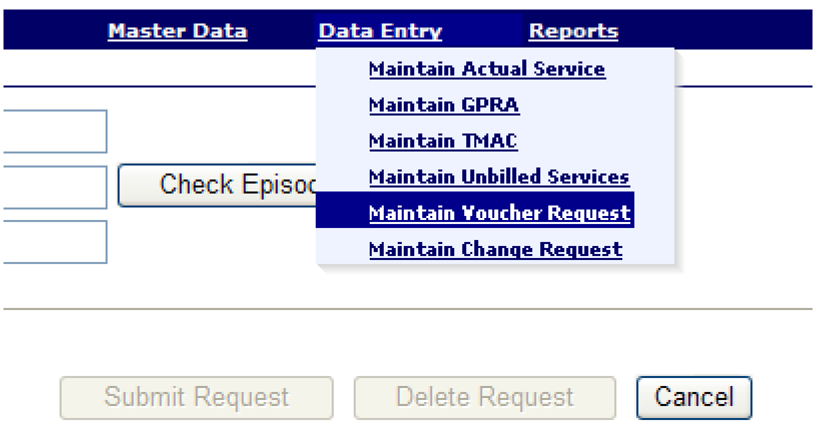
How to Request an Episode and an Assessment Voucher

(Completed by the assessor only)

- *If there is already an open episode for a client, the user will be presented with: "**An episode is already requested for the selected client. Please enter Voucher Request Details**."*

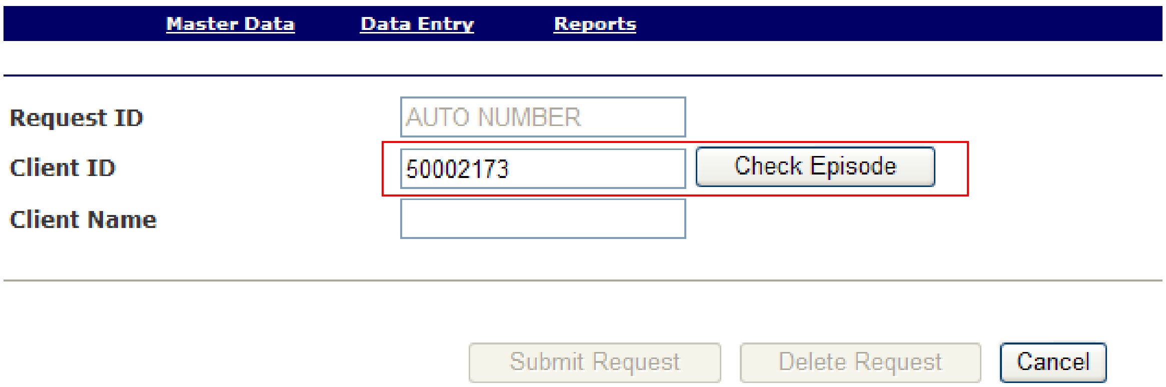
Instructions

1. **Hover the cursor over Data Entry and choose Maintain Voucher Request from the dropdown menu.**

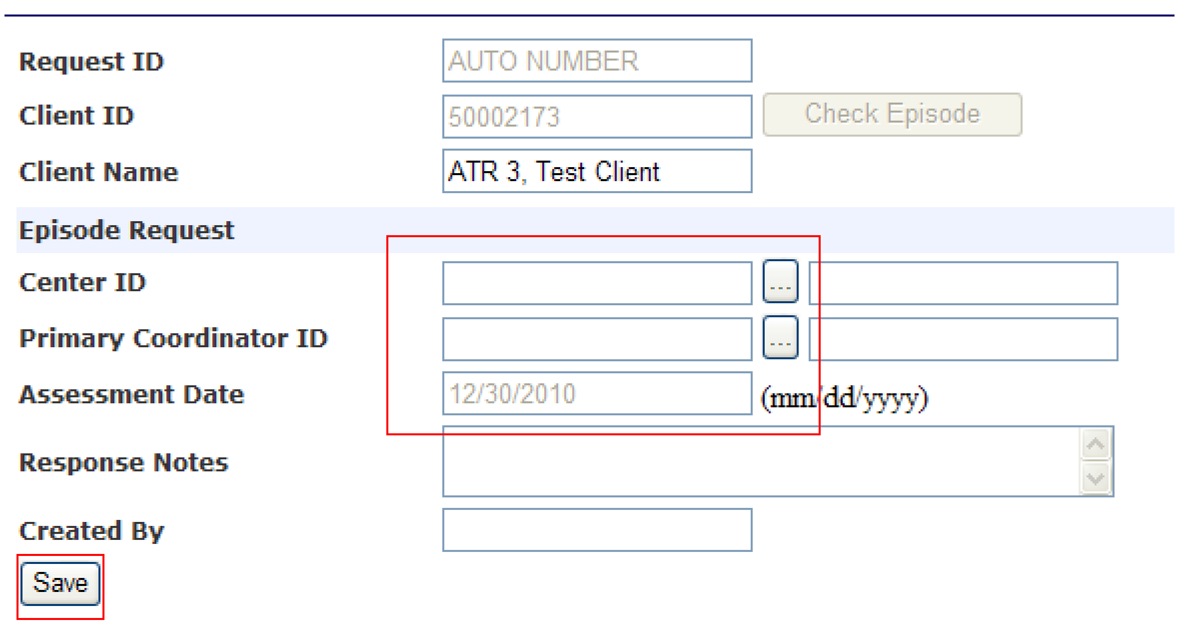


Section III Cont…

2. Enter the client's ID in the Client ID field and select the Check Episode button.

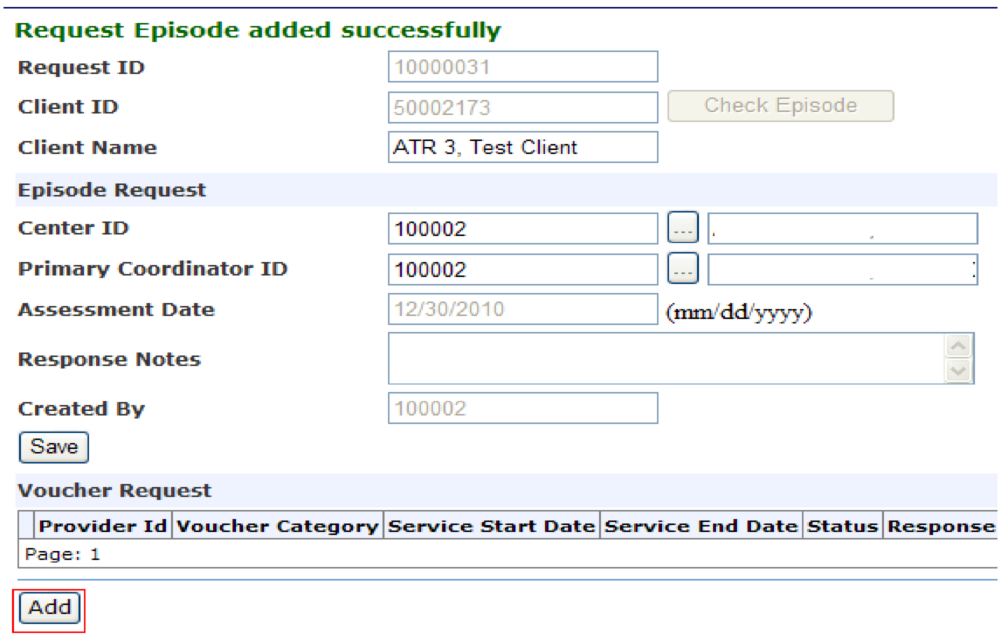


3. Complete the 3 required fields and select the Save button.
(Center ID and Primary Coordinator ID should both be the assessor's Provider ID.)



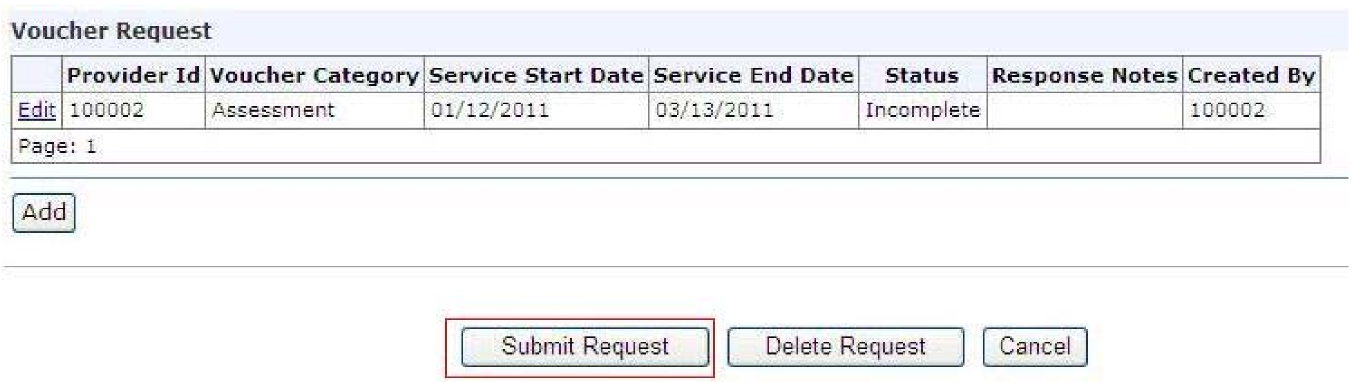
Section III Cont…

4. Select the Add **button .**



5. Use the dropdown menu to choose the correct assessment type and select the Save **button .**

6. Once the assessment voucher has been saved on the episode, click on the
Submit Request button.
Please verify you receive the message Request submitted successfully!! at the very top of the screen.


Voucher Request

	Provider Id	Voucher Category	Service Start Date	Service End Date	Status	Response Notes	Created By
Edit	100002	Assessment	01/12/2011	03/13/2011	Incomplete		100002
Page: 1							

Add

Submit Request Delete Request Cancel

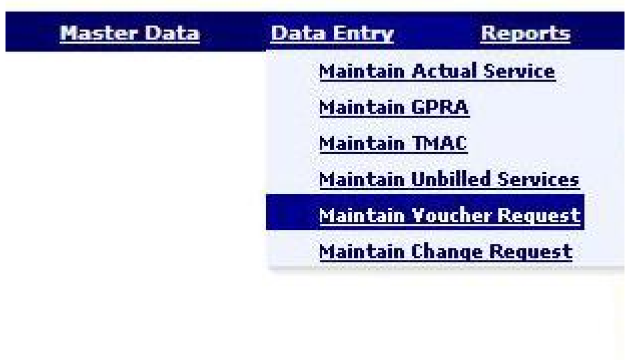
Section IV

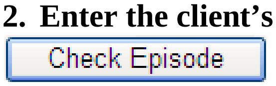
How to Request a Case Management Voucher

(Completed by the Case Manager only)

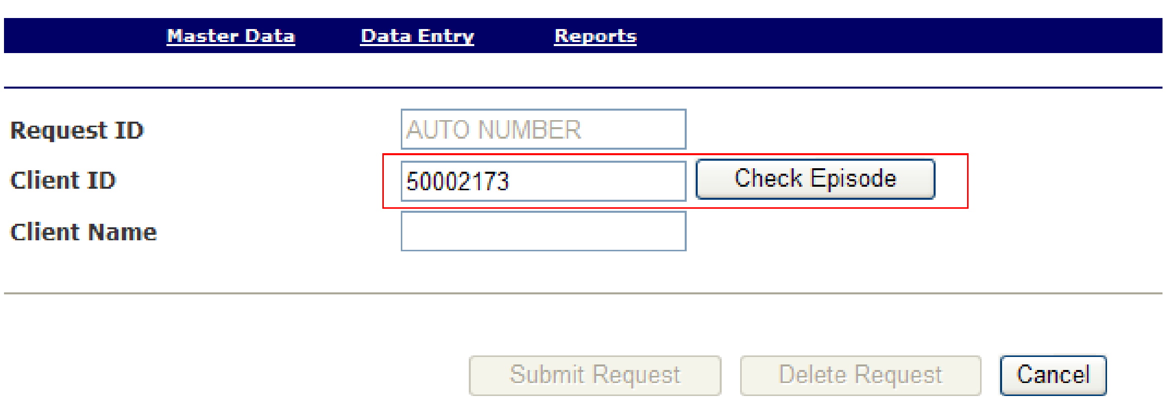
Instructions

1. Hover the cursor over Data Entry and choose Maintain Voucher Request from the dropdown menu.



2. Enter the client's ID in the Client ID field and select the 

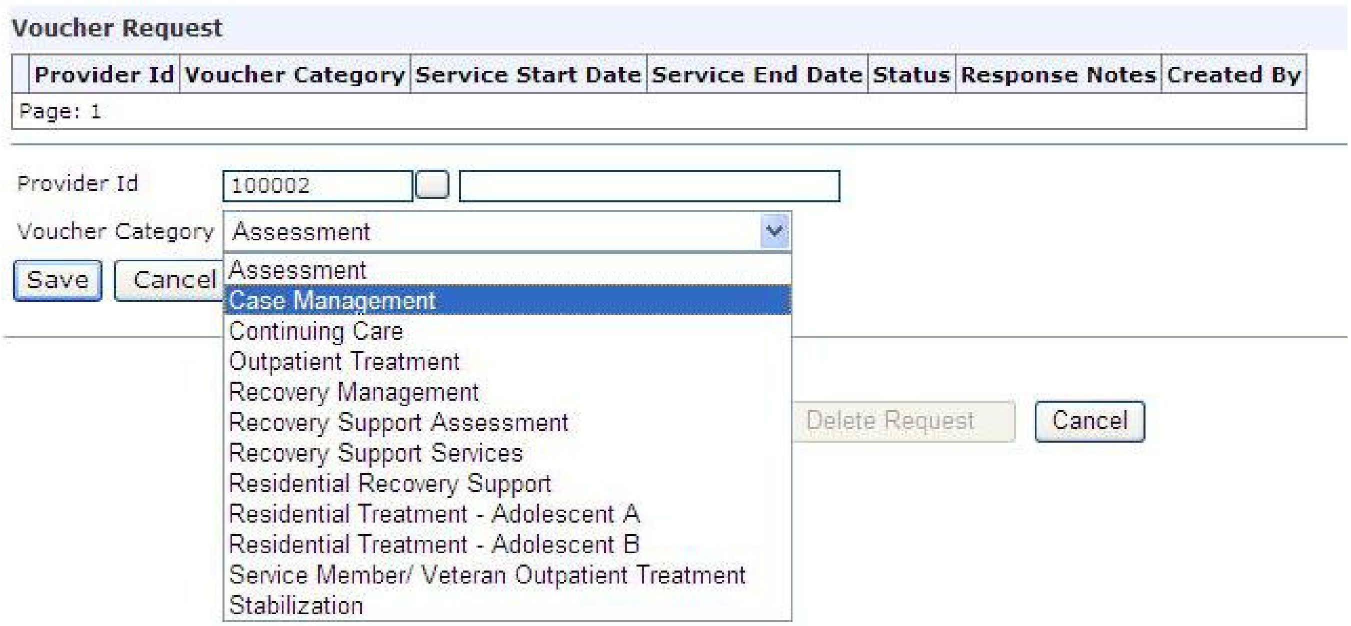
button.



3. **A red message will appear at the top that says *"An episode is already requested for the selected client. Please enter Voucher Request Details."***

4. **Click on the** Add **button.**

5. Select the Case Management Voucher from the menu.



6. Select the Save **button, then press the** Submit Request **button. Please verify you receive the message "Request submitted successfully!! at the very top of the screen.**

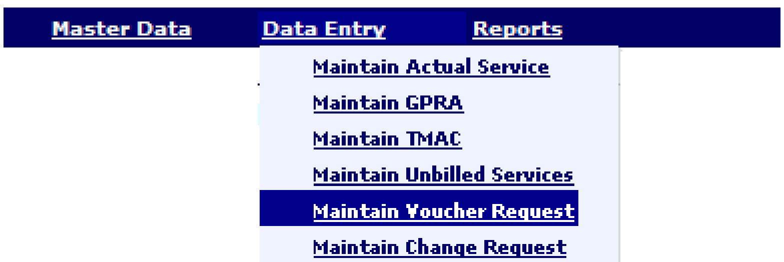
Section V

How to Check Voucher/Episode Request Status

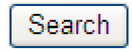
Only the provider ID that submitted a request will be able to view the client's status.

Instructions

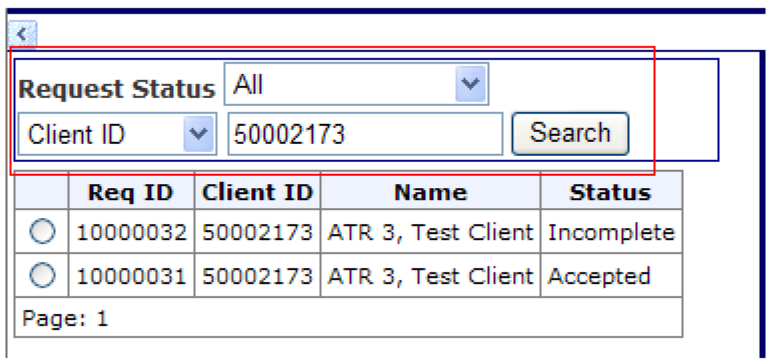
1. Hover the cursor over Data Entry and choose Maintain Voucher Request from the dropdown menu.



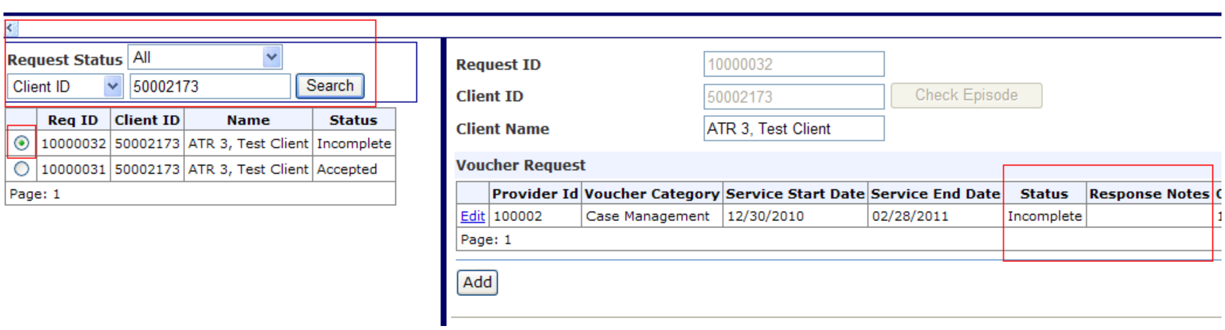
2 . On the left side of the screen, change the drop down menus to *All* and *Client ID*.

Type the client's ID in the provided text box and select the 

button.
(Only the requested client should be listed.)



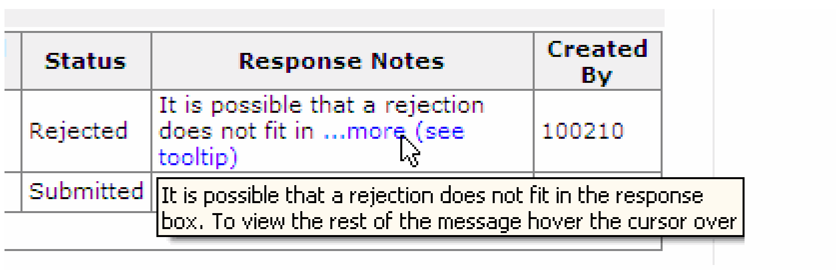
3. Select the radial button for the Req ID for the client to review the Status and Response Notes on the right side of the screen.



Status Definitions

Incomplete: The request has not yet been submitted. This can usually be remedied by selecting the **Submit** button.
Submitted: A request has been submitted by the provider but has not yet been reviewed by the Call Center for approval.
Accepted: A request has been accepted by the Call Center.
Partially Accepted: A part of the request has been accepted and a part has been rejected. Each rejection will need to be resubmitted by the provider after corrections have been made.
Rejected: A request has been rejected by the Call Center. (Review the **Response Notes** for further instructions.)

If a ***Response Note*** *does not fit in the provided box, the message "…more (see tooltip)" will display. To view the entire response, hover the cursor over this message until it appears.*



Section VI

How to Enter a GPRA

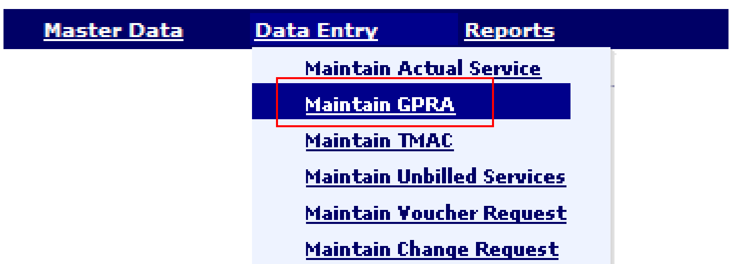
(Completed by the case manager)

An Intake GPRA must be entered before treatment and/or RSS Voucher(s) may be requested.

- *The intake GPRA can only be entered after the Case Management voucher is approved.*
- *If a user clicks **Save and Continue** instead of the **Complete** button on the last page, the GPRA will remain incomplete for further editing or corrections.*

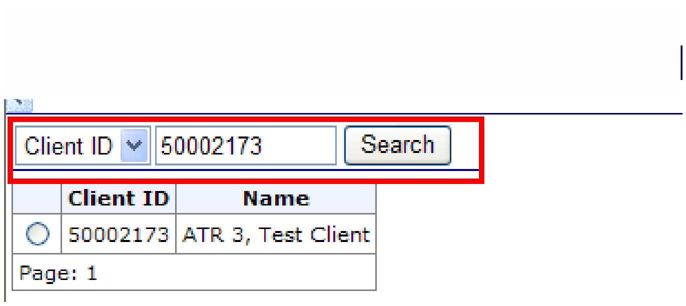
Instructions

1. Hover the cursor over Data Entry and choose Maintain GPRA from the dropdown menu.

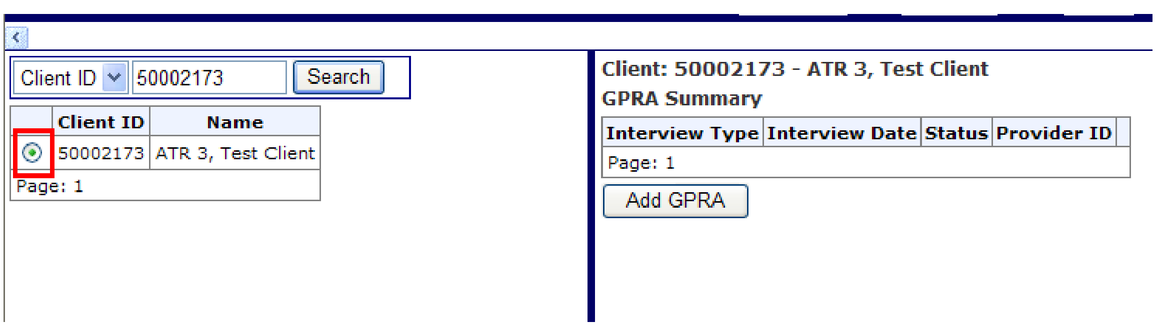


Section VI Cont…

2. On the left side of the screen, change the dropdown menu to *Client ID* and enter the client's ID in the provided text box. Select the Search button.

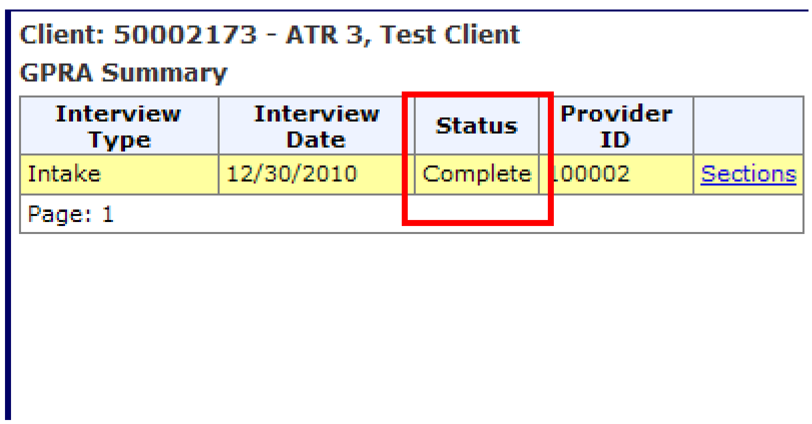


3. Select the radial button for the requested client to display their GPRA information on the right side of the screen.



4. **Select the** Add GPRA **button, pick the correct GPRA Interview Type and fill out all the required information. Be sure to use the** Complete **button on the last page to finish and return to the main GPRA screen.**

5. **Verify that the Status is Complete.**



Client: 50002173 - ATR 3, Test Client

GPRA Summary

Interview Type	Interview Date	Status	Provider ID	
Intake	12/30/2010	Complete	100002	Sections
Page: 1				

Note: *All subsequent GPRAs will be entered the same way.*

Section VII

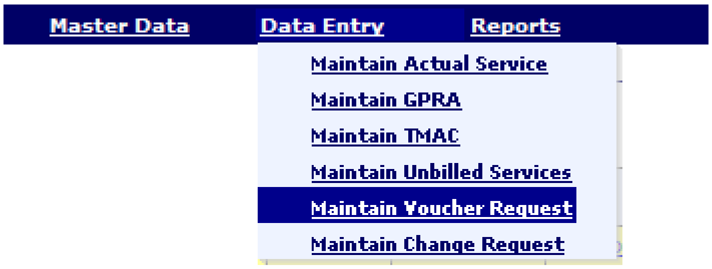
How to Request Treatment and Recovery Support Services (RSS) Vouchers

This section describes how to request vouchers on an existing episode.

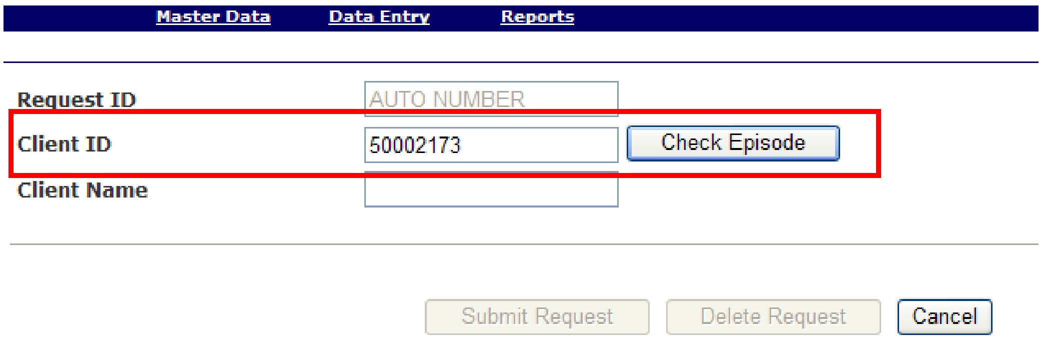
- *Treatment Vouchers will be rejected by the Call Center until a client has all of the following:*
  - *Open Episode*
  - *Corresponding Assessment and Case Management vouchers approved*
  - *Completed Intake GPRA*

Instructions

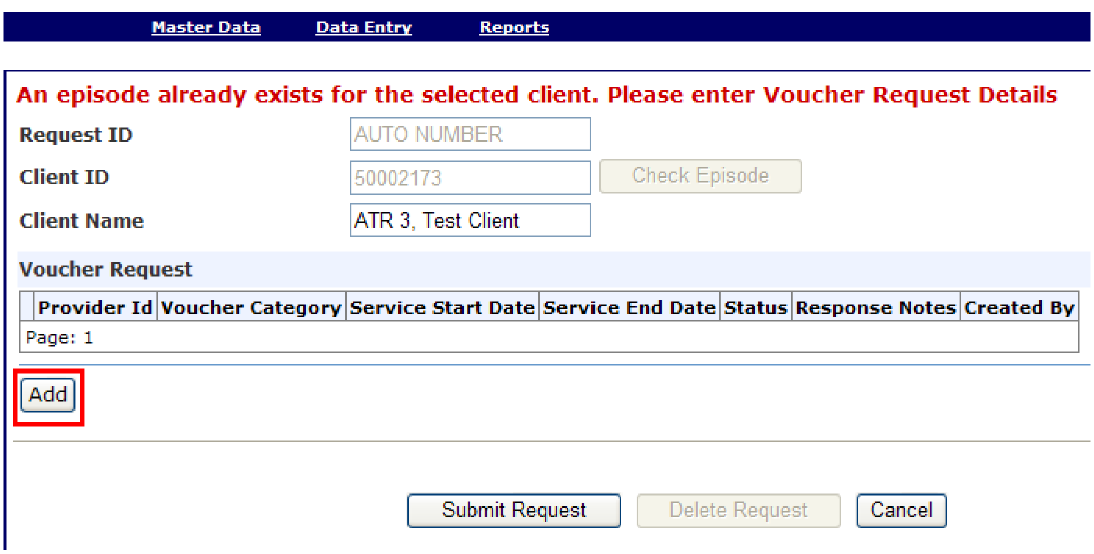
1. Hover the cursor over Data Entry and choose Maintain Voucher Request from the dropdown menu.



2. Enter the client's ID in the Client ID field and select the Check Episode button.



3. You should receive the message: "An episode is already requested for the selected client. Please enter Voucher Request Details". Select the Add button to create and submit vouchers.



4. Select the Treatment / RSS voucher you wish to request, then enter in the provider ID number of the facility the client will be receiving services at. Once you are completed, click on the Save **button, then click on the** Submit Request **button.**

5. Please verify you receive the message Request submitted successfully!! at the very top of the screen.

Section VIII

How to Verify Voucher Possession

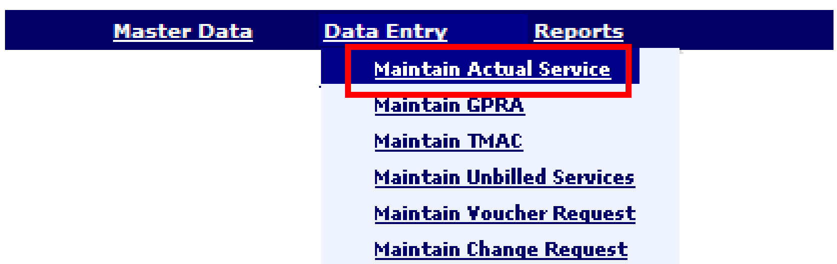
(Completed by any facility that will be billing on a voucher)

This is the only screen that provides verification that a facility has an approved voucher.

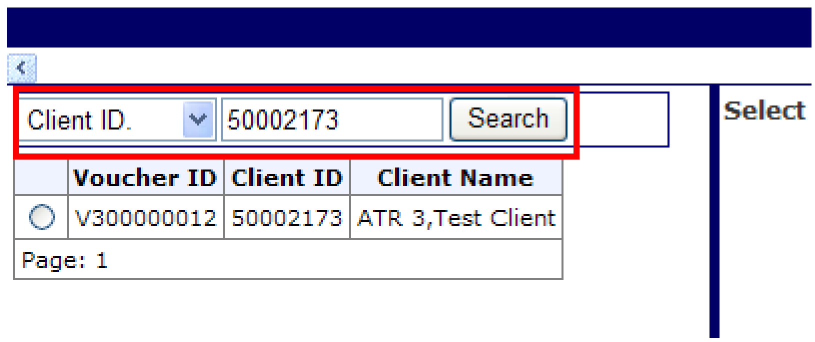
- Only the Provider ID that has been assigned a voucher will be able to view it. If a program has multiple locations, be sure to use the correct Provider ID.

Instructions

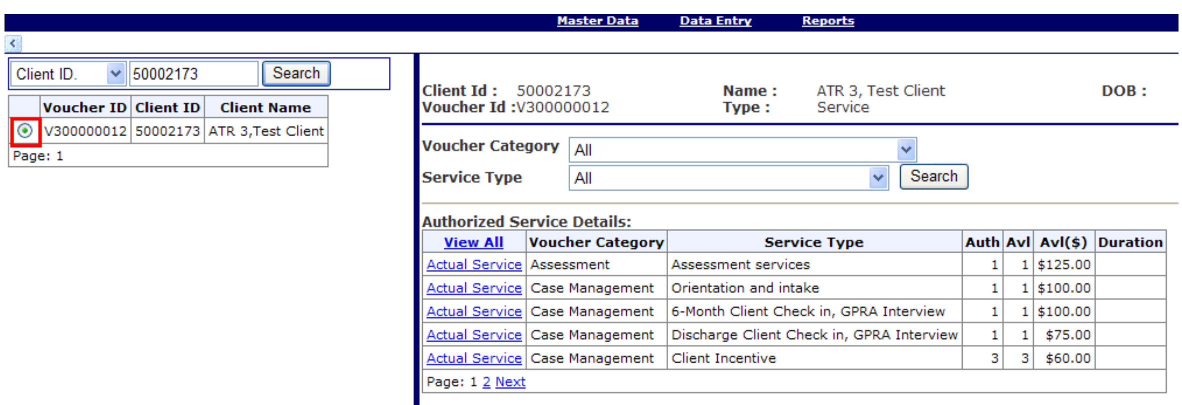
1. Hover the cursor over Data Entry and choose Maintain Actual Service from the dropdown menu.



3. **On the left side of the screen, change the dropdown menu to *Client ID* and enter the client's ID in the provided text box. Select the Search button.**



4. **Select the radial button for the requested client to display their billing information on the right side of the screen.**



5. **Verify the correct Voucher Categories are present.**

NOTE: If the voucher category is not listed on the page, check additional pages.

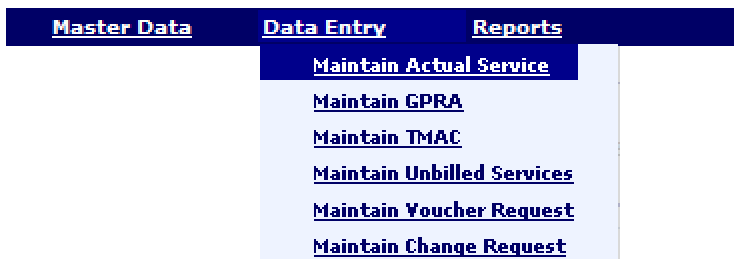
How to Bill for Services

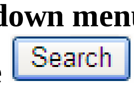
(Completed by any facility with an assigned voucher)

Only the provider ID that has assigned vouchers will be able to bill on them.

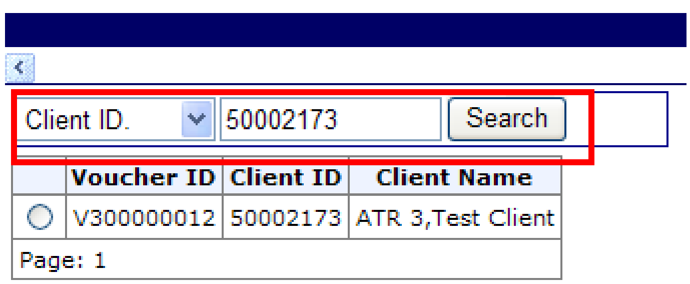
<u>Instructions</u>

1. Hover the cursor over Data Entry and select Maintain Actual Service from the dropdown menu.

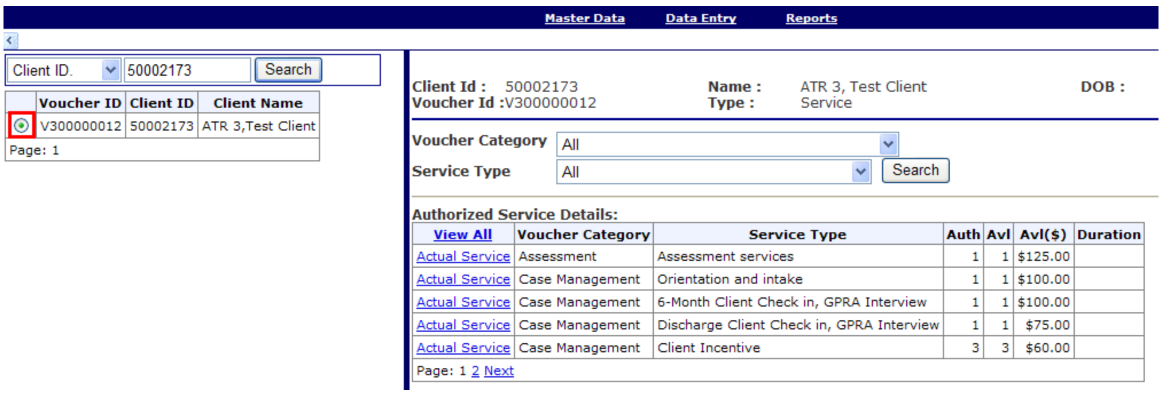


2. On the left side of the screen, change the dropdown menu to *Client ID* and enter the client's ID in the provided text box. Select the 

button.
(Only the requested client should be listed.)



3. Select the radial button for the requested client to display their billing information on the right side of the screen.



Master Data Data Entry Reports

Client ID. 50002173 Search

	Voucher ID	Client ID	Client Name
	V300000012	50002173	ATR 3,Test Client

Page: 1

Client Id : 50002173 **Name :** ATR 3, Test Client **DOB :**
Voucher Id :V300000012 **Type :** Service

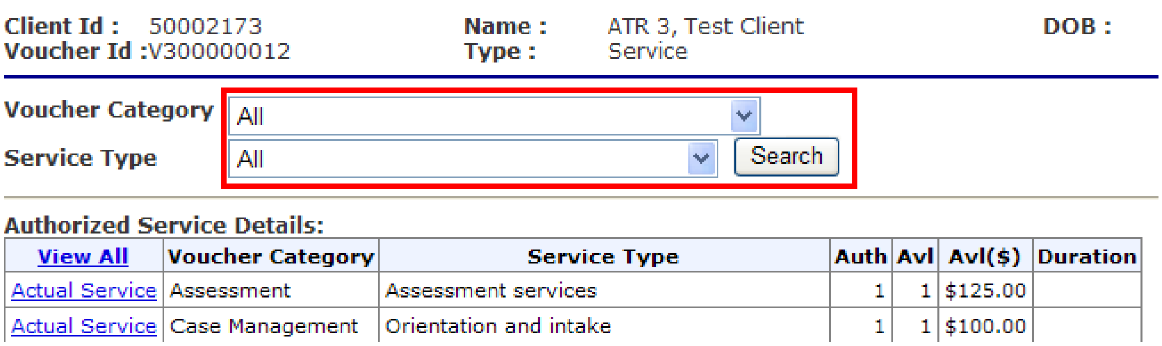
Voucher Category All
Service Type All Search

Authorized Service Details:

View All	Voucher Category	Service Type	Auth	Avl	Avl($)	Duration
Actual Service	Assessment	Assessment services	1	1	$125.00	
Actual Service	Case Management	Orientation and intake	1	1	$100.00	
Actual Service	Case Management	6-Month Client Check in, GPRA Interview	1	1	$100.00	
Actual Service	Case Management	Discharge Client Check in, GPRA Interview	1	1	$75.00	
Actual Service	Case Management	Client Incentive	3	3	$60.00	

Page: 1 2 Next

4. Use the dropdown menus to search for a specific Service Type or Voucher Category. (Reset menus to *All* to view all Categories.)



Client Id : 50002173 **Name :** ATR 3, Test Client **DOB :**
Voucher Id :V300000012 **Type :** Service

Voucher Category All
Service Type All Search

Authorized Service Details:

View All	Voucher Category	Service Type	Auth	Avl	Avl($)	Duration
Actual Service	Assessment	Assessment services	1	1	$125.00	
Actual Service	Case Management	Orientation and intake	1	1	$100.00	

5. Select the Actual Service link for the Service Type to be billed. (The row will highlight in yellow and all previous billings for this service type will be displayed below.)

Authorized Service Details:

View All	Voucher Category	Service Type	Auth	Avl	Avl($)	Duration
Actual Service	Assessment	Assessment services	1	1	$125.00	
Actual Service	Case Management	Orientation and intake	1	1	$100.00	
Actual Service	Case Management	6-Month Client Check in, GPRA Interview	1	1	$100.00	
Actual Service	Case Management	Discharge Client Check in, GPRA Interview	1	1	$75.00	
Actual Service	Case Management	Client Incentive	3	3	$60.00	

Page: 1 2 Next

Actual Service Details:

	Voucher Category	Service Type	Service Date	Units	Amt($)	Status	Deleted	Hold	Provider ID

Page: 1

6. Scroll to the bottom and select the Add button.

Authorized Service Details:

View All	Voucher Category	Service Type	Aut
Actual Service	Assessment	Assessment services	
Actual Service	Case Management	Orientation and intake	
Actual Service	Case Management	6-Month Client Check in, GPRA Interview	
Actual Service	Case Management	Discharge Client Check in, GPRA Interview	
Actual Service	Case Management	Client Incentive	

Page: 1 2 Next

Actual Service Details:

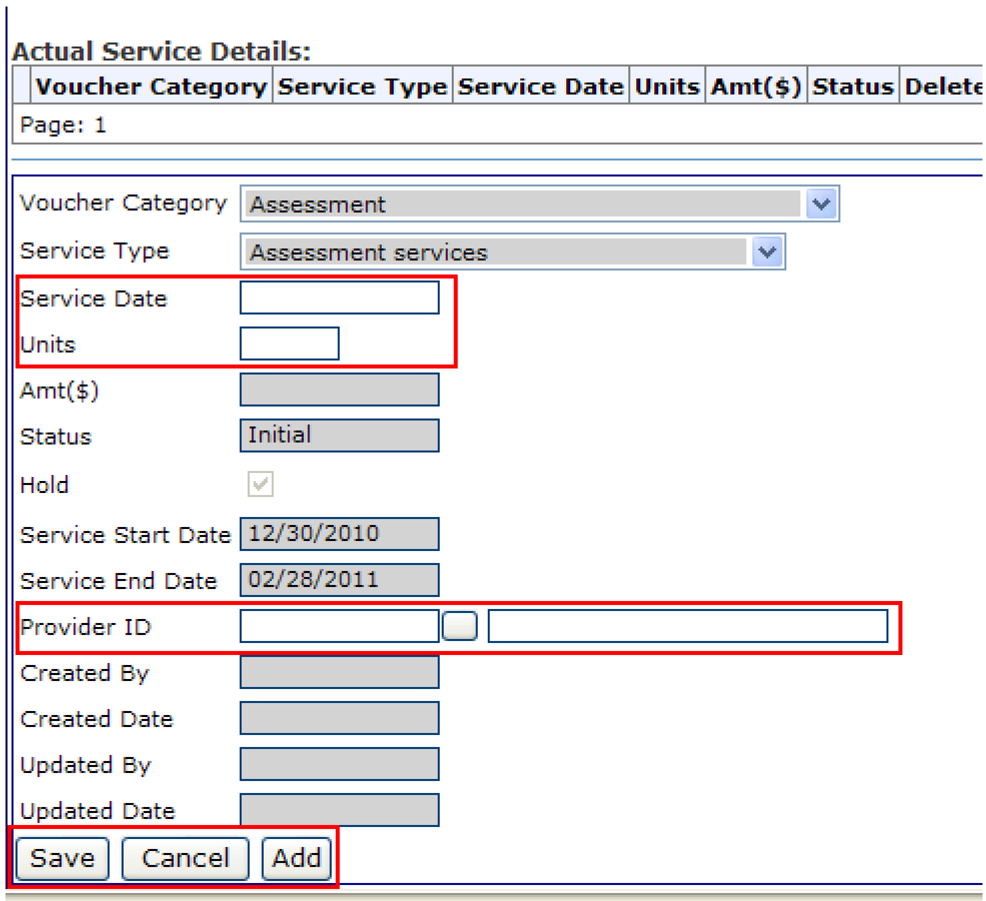
	Voucher Category	Service Type	Service Date	Units	Amt($)	Status	Delete

Page: 1

Add

Section IX Cont…

7. Fill out all required information and select the Save button following the same guidelines as voucher requests.



The billings have now been entered and saved. However, there is a final approval process (Section X) that MUST be completed only by an authorized representative of your organization/entity.

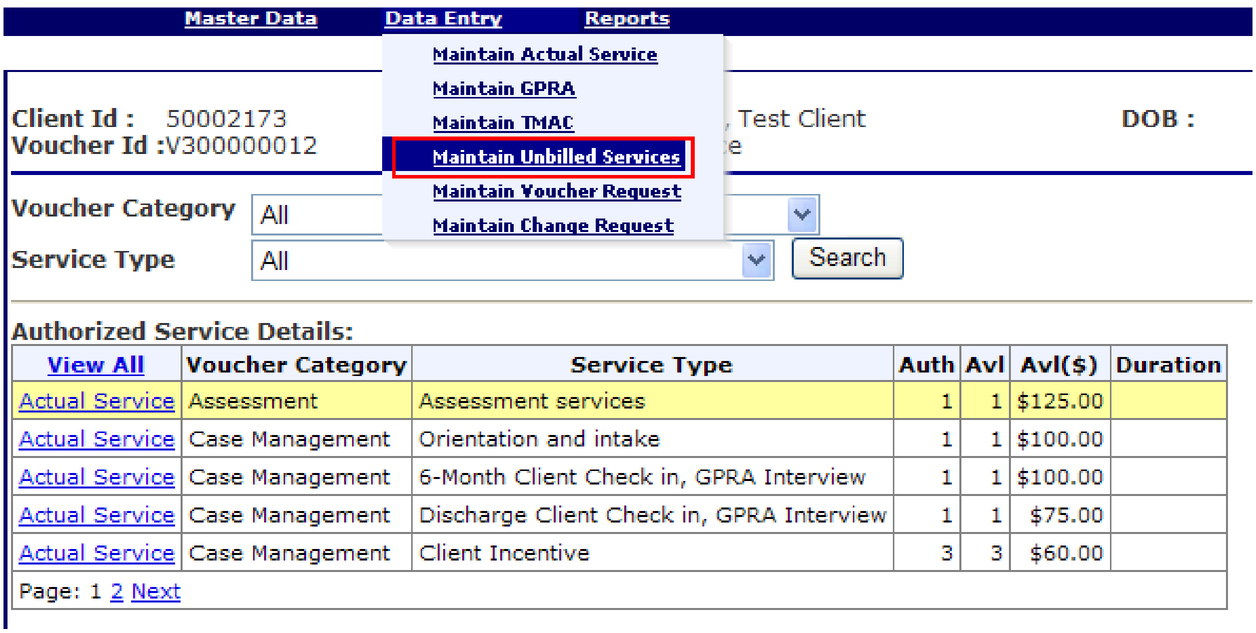
Section X

How to Approve and Release Billing

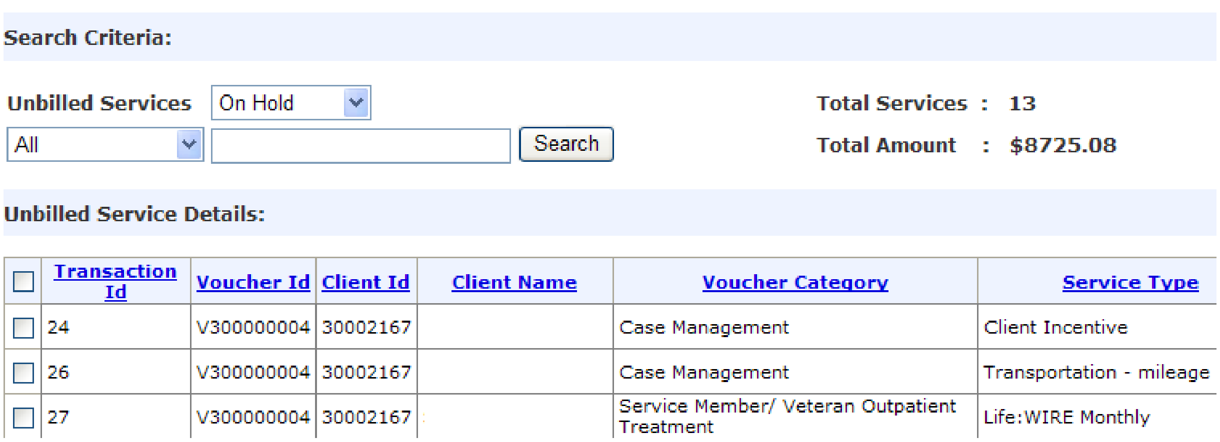
(Completed by any facility with an assigned voucher)

Instructions

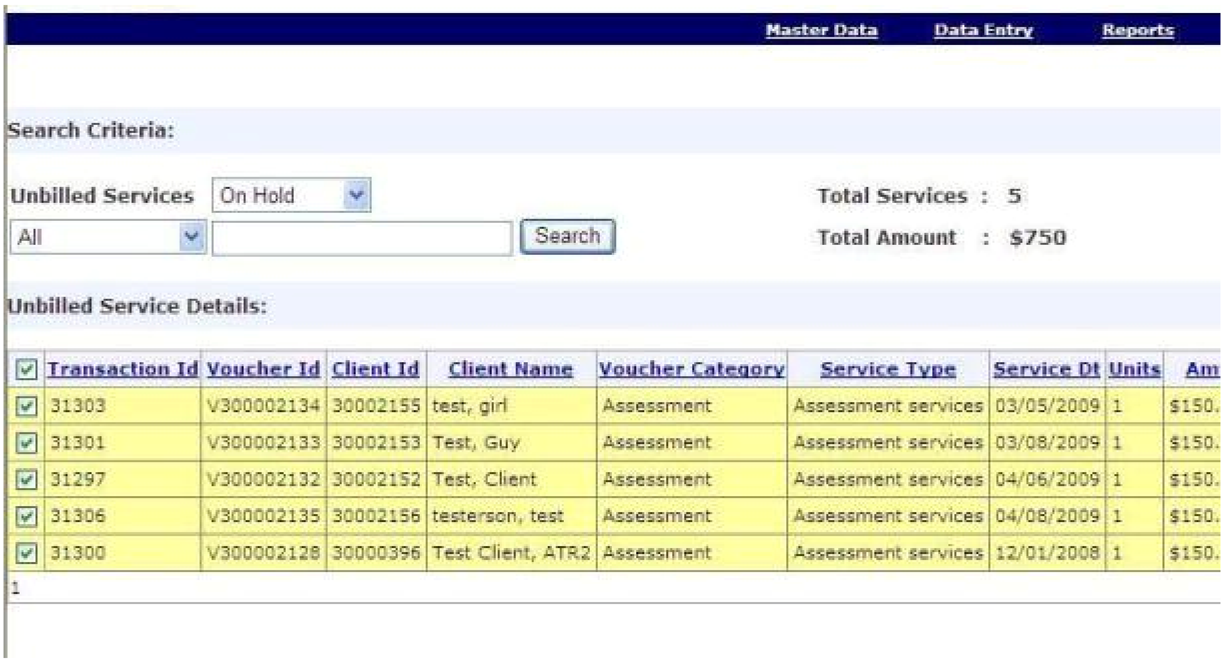
1. **Hover the cursor over Data Entry and select Maintain Unbilled Services from the dropdown menu.**



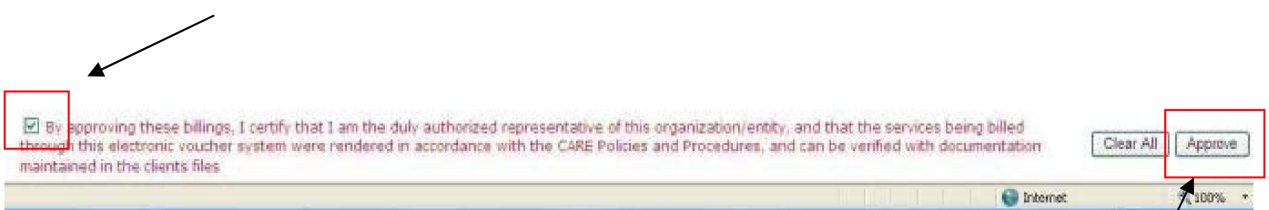
2. **The following screen will display a summary of the services billed for, as well as the total amount of all billings. These are On Hold until approved (STEP 3).**



3. **To authorize each service, select the checkbox next to each line. It will then highlight that line in yellow. Or, you may SELECT ALL by selecting the top checkbox (shown in red box below).**



4. **Once all the charges have been selected and approved, you must then confirm you are an authorized representative of the organization/entity, and the services being billed through the VMS were rendered in accordance with the CARE Policies and Procedures, and can be verified with documentation maintained in the client's file. This is done by selecting the check box at the bottom of the page.**



5. **Once the authorization box is checked, the final step is to select Approve.**

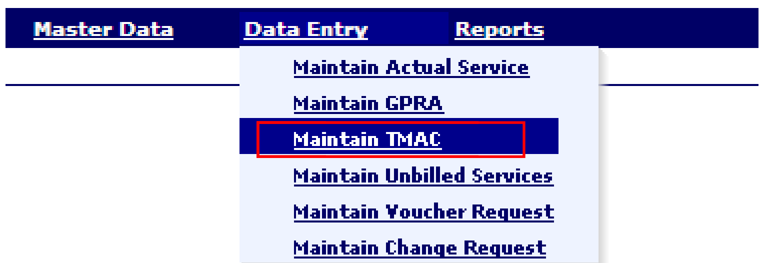
Section XI

How to Enter a TMAC Session

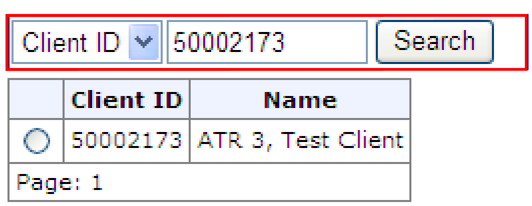
(Completed by the outpatient facility)

<u>Instructions</u>

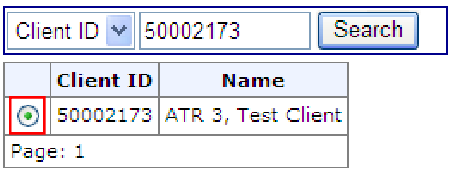
1. **Hover the cursor over Data Entry and choose Maintain TMAC from the dropdown menu.**

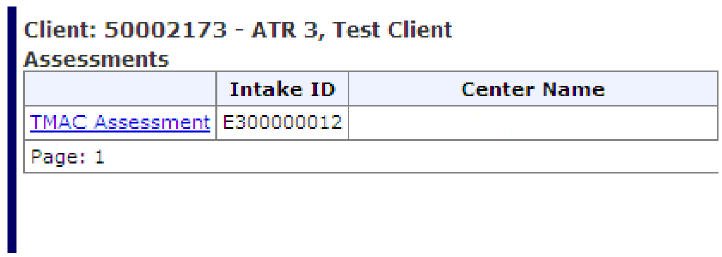


2. **On the left side of the screen, change the drop down menu to *Client ID* and enter the client's ID in the provided text box. Select the Search button.**

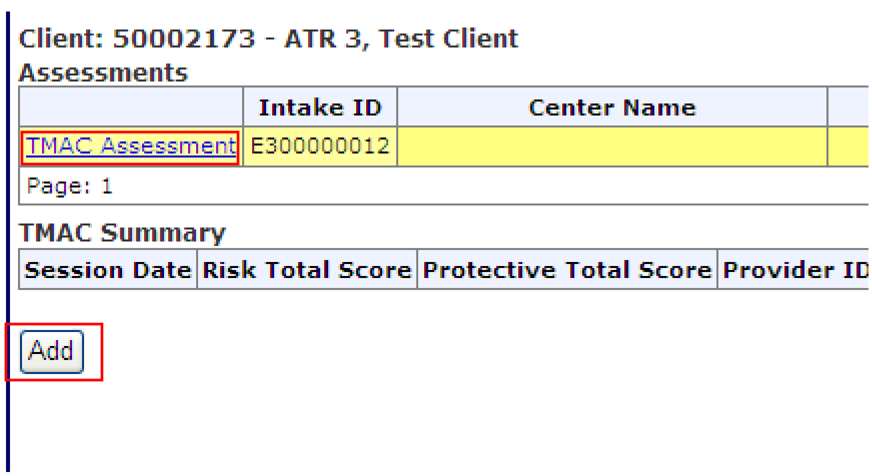


3. **Select the radial button for the requested client to display their TMAC information on the right side of the screen.**



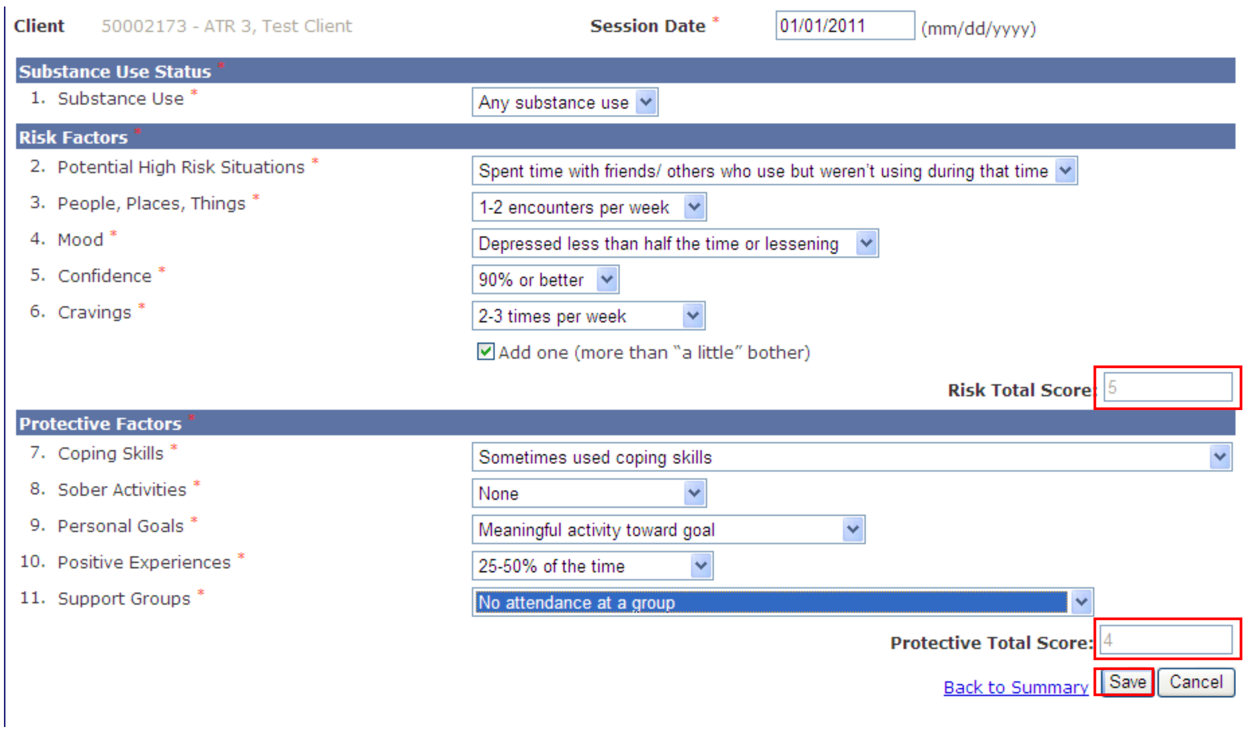


4. **Select the TMAC Assessment link, and then click on the Add button for the TMAC session to be entered.**

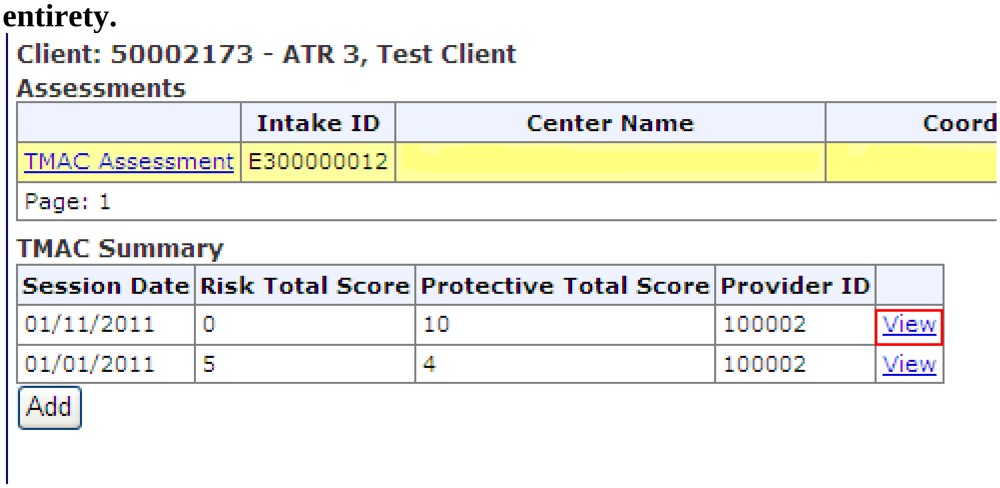


Section XI Cont…

5. **Once the TMAC Session screen appears, answer each question. The Risk Total Score and the Protective Total Score for the client are calculated automatically as the questions are answered. When completed, click on the Save button.**



6. **After saving a TMAC session, the main client screen will display a summary of TMAC entries. Selecting the View link will allow you to see the TMAC session in its entirety.**



Client: 50002173 - ATR 3, Test Client

Assessments

	Intake ID	Center Name	Coord
TMAC Assessment	E300000012		
Page: 1			

TMAC Summary

Session Date	Risk Total Score	Protective Total Score	Provider ID	
01/11/2011	0	10	100002	View
01/01/2011	5	4	100002	View

Add

Section XII

Instructions for "Case Manager Activity List" Report

There is a new report in the VMS designed for Case Managers. This report gives Case Managers access to detailed information on each client's treatment / recovery progress.

<u>Instructions</u>

1. **Login to the VMS, then go to "Reports", then "Provider Reports."**

2. **On the left side, click on "Case Manager Activity List"**

3. **Once the screen loads, click on "View Report" to view the entire report. This will load a PDF version of the report for each of your clients. Please note you may also type in a clients ID number before clicking on "View Report" if you would like only view one client at a time.**

Section XII Cont…

MAXIMUS

California Access to Recovery Effort (CARE)

Case Manager Activity List

Case Manager : 100002 -

Client : 50000029 -

Voucher ID : V50000002

Service Category : Assessment | **Voucher Date :** 12/28/2010 - 01/28/2011 | **Auth Amt :** 125.00 | **Avl Amt :** 0.00

Service Type	Auth/Avl Units	Avl Amt	Service Date	Units	Provider
Assessment services	1/0	0.00	12/28/2010	1	100002 -

Service Category : Case Management | **Voucher Date :** 12/28/2010 - 08/28/2011 | **Auth Amt :** 700.00 | **Avl Amt :** 530.00

Service Type	Auth/Avl Units	Avl Amt	Service Date	Units	Provider
Orientation and intake	1/0	0.00	12/28/2010	1	100002 -
6-Month Client Check in, GPRA Interview	1/1	100.00			
Discharge Client Check in, GPRA Interview	1/1	75.00			
Client Incentive	3/3	60.00			
Case Management	70/63	530.00	02/07/2011	2	100002 -
		530.00	02/08/2011	2	100002 -
		530.00	02/17/2011	2	100002 -
		530.00	02/28/2011	1	100002 -
Transportation - Public	50/50	150.00			
Transportation - mileage only		530.00			
Life:WIRE Orientation	1/1	25.00			
Life:WIRE Monthly		530.00			

Service Category : Outpatient Treatment | **Voucher Date :** 01/03/2011 - 04/03/2011 | **Auth Amt :** 2000.00 | **Avl Amt :** 1245.00

Service Type	Auth/Avl Units	Avl Amt	Service Date	Units	Provider
Life:WIRE Orientation	1/1	25.00			
Life:WIRE Monthly		1245.00			
Coordination	12/12	60.00			
Alcohol/Drug tests	12/12	240.00			

This is a sample of the report that will load. It is broken out by voucher type, and shows each service and amount billed by the treatment provider.

Definitions of the report sections:

Service Category: Voucher Type

Voucher Date: Date the voucher is valid for

Auth Amt: Maximum amount the voucher is valid for

Avl Amt: Amount left on the voucher that is eligible to be billed on

Auth/Avl Units: Maximum amount of units and available units that can be billed on

Service Date: Last date the client received the service

Units: Number of times the service was billed for

Provider: ID number and name of the provider providing the service