



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

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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.)*

Instructions

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

California Access to Recovery Effort (CARE)


Home



Section II Cont...

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

Master Data

SSN * 


Client ID

Demographics

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

MAXIMUS Home | Logout

<p>Hispanic * <input type="text" value="--Select--"/></p> <p>Race Must Select Option(s) from Race Category</p> <div style="display: flex; justify-content: space-between; font-size: x-small;"> <div> <input type="checkbox"/> Black or African American <input type="checkbox"/> Asian <input type="checkbox"/> American Indian <input type="checkbox"/> Native Hawaiian or other Pacific Islander </div> <div> <input type="checkbox"/> Alaska Native <input type="checkbox"/> White <input type="checkbox"/> Refused </div> </div>	<p>Ethnicity * <input type="text" value="--Select--"/></p> <div style="border: 1px solid #ccc; padding: 2px; font-size: x-small;"> <input type="checkbox"/> Central American <input type="checkbox"/> Puerto Rican <input type="checkbox"/> Cuban <input type="checkbox"/> South American <input type="checkbox"/> Dominican <input type="checkbox"/> Other <input type="checkbox"/> Mexican </div> <p>(If other, specify) <input type="text"/></p>	
<p>Address</p> <p>Address Line 1 * <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Phone * <input type="text" value="(999-999-9999)"/> (999-999-9999)</p> <p>Alternative Phone <input type="text" value="(999-999-9999)"/> (999-999-9999)</p>		
<p>Mailing Address (If different than above Address)</p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p>		
<p>Authorized Representative/Contact (If needed)</p> <p>First Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Phone <input type="text" value="(999-999-9999)"/> (999-999-9999)</p> <p>Alternative Phone <input type="text" value="(999-999-9999)"/> (999-999-9999)</p>		
<p>Authorized Representative Mailing Address (If different than above Address)</p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p>		
<p>Other Information</p> <p>Medical Ins Available <input type="text" value="No"/></p> <p>Medical Ins Name <input type="text"/></p> <p>Consent Expiry Date <input type="text" value="(mm/dd/yyyy)"/> (mm/dd/yyyy)</p> <p>How were you referred to this program? <input type="text" value="--Select--"/></p> <p>(If other, specify) <input type="text"/></p>		
<p>Proof of Residence <input type="text" value="No"/> (If Yes, specify) <input type="text" value="--Select--"/></p> <p>Military Status * <input type="text" value="--Select--"/></p>		



Section II Cont...

4. Record the Client ID number in your files!

New Client has been successfully added! [Client ID: 50002173]. Please note this ID for future use.

SSN *

777888999

Add

Section III

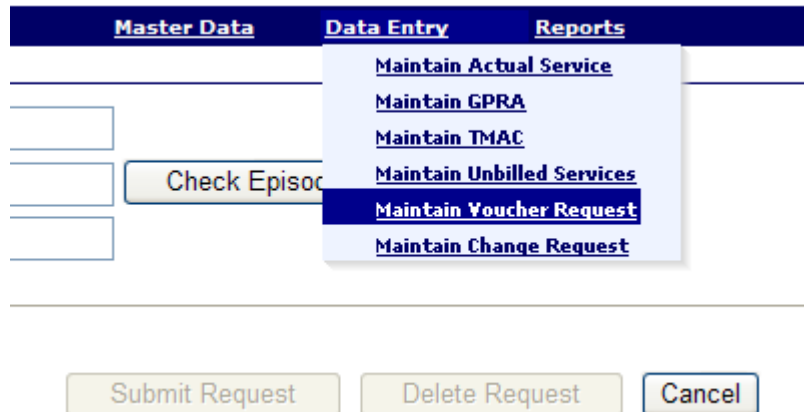
How to Request an Episode and an Assessment Voucher

(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

button.

Master Data	Data Entry	Reports
Request ID	<input type="text" value="AUTO NUMBER"/>	
Client ID	<input type="text" value="50002173"/>	<input type="button" value="Check Episode"/>
Client Name	<input type="text"/>	

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

Request ID	<input type="text" value="AUTO NUMBER"/>	
Client ID	<input type="text" value="50002173"/>	<input type="button" value="Check Episode"/>
Client Name	<input type="text" value="ATR 3, Test Client"/>	
Episode Request		
Center ID	<input type="text"/>	<input type="text"/>
Primary Coordinator ID	<input type="text"/>	<input type="text"/>
Assessment Date	<input type="text" value="12/30/2010"/>	(mm/dd/yyyy)
Response Notes	<input type="text"/>	
Created By	<input type="text"/>	

Section III Cont...

4. Select the **Add** button .

Request Episode added successfully

Request ID
Client ID
Client Name

Episode Request

Center ID ...
Primary Coordinator ID ...
Assessment Date (mm/dd/yyyy)
Response Notes
Created By

Voucher Request

Provider Id	Voucher Category	Service Start Date	Service End Date	Status	Response
Page: 1					

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

Voucher Request

Provider Id	Voucher Category	Service Start Date	Service End Date	Status	Response Notes
Page: 1					

Provider Id

Voucher Category

Section III Cont...

6. Once the assessment voucher has been saved on the episode, click on the

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

Section IV

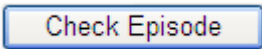
How to Request a Case Management Voucher

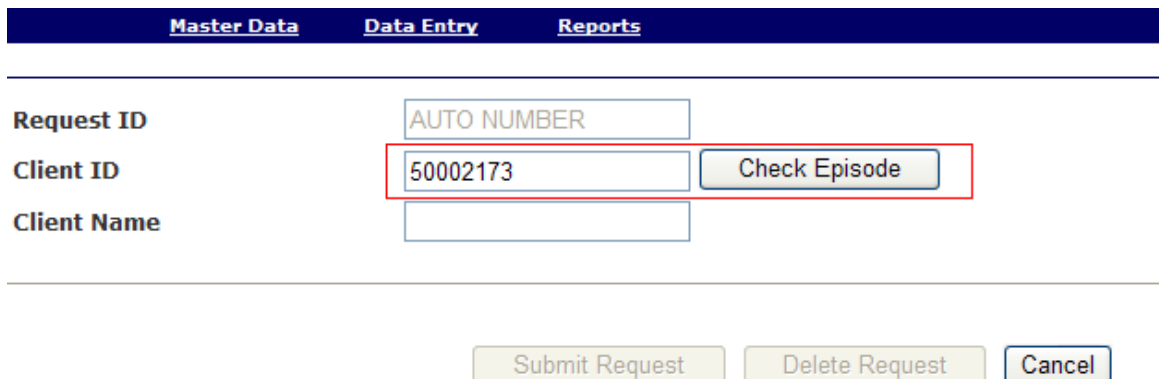
(Completed by the Case Manager only)

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.

A screenshot of a web application form. At the top, there is a dark blue navigation bar with 'Master Data', 'Data Entry', and 'Reports' tabs. Below the navigation bar, there are three input fields: 'Request ID' with the value 'AUTO NUMBER', 'Client ID' with the value '50002173', and 'Client Name' which is empty. To the right of the 'Client ID' field is a button labeled 'Check Episode'. Below the input fields, there are three buttons: 'Submit Request', 'Delete Request', and 'Cancel'. The 'Client ID' field and the 'Check Episode' button are highlighted with a red border.

Section IV Cont...

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 button.

An episode already exists for the selected client. Please enter Voucher Request Details

Request ID	<input type="text" value="AUTO NUMBER"/>	
Client ID	<input type="text" value="50002173"/>	<input type="button" value="Check Episode"/>
Client Name	<input type="text" value="ATR 3, Test Client"/>	

Voucher Request

Provider Id	Voucher Category	Service Start Date	Service End Date	Status	Response Notes	Created By
Page: 1						

Section IV Cont...

5. Select the Case Management Voucher from the menu.

Voucher Request

Provider Id	Voucher Category	Service Start Date	Service End Date	Status	Response Notes	Created By
Page: 1						

Provider Id

Voucher Category

- Assessment
- Case Management**
- Continuing Care
- Outpatient Treatment
- Recovery Management
- Recovery Support Assessment
- Recovery Support Services
- Residential Recovery Support
- Residential Treatment - Adolescent A
- Residential Treatment - Adolescent B
- Service Member/ Veteran Outpatient Treatment
- Stabilization

6. Select the button, then press the 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
Page: 1						

Provider Id

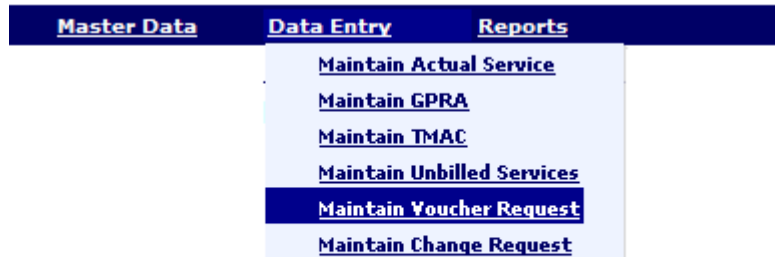
Voucher Category

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.



Section V Cont...

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.)

The screenshot shows a search interface with the following elements:

- Request Status:** A dropdown menu set to "All".
- Client ID:** A text input field containing "50002173" and a "Search" button.
- Table:** A table with columns: Req ID, Client ID, Name, and Status.

	Req ID	Client ID	Name	Status
<input type="radio"/>	10000032	50002173	ATR 3, Test Client	Incomplete
<input type="radio"/>	10000031	50002173	ATR 3, Test Client	Accepted
- Page:** 1

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.

The screenshot shows the detailed view for Request ID 10000032. The left sidebar shows the search filters and the table from the previous step, with the first row selected. The main content area displays:

- Request ID:** 10000032
- Client ID:** 50002173 (with a "Check Episode" button)
- Client Name:** ATR 3, Test Client
- Voucher Request Table:**

	Provider Id	Voucher Category	Service Start Date	Service End Date	Status	Response Notes
Edit	100002	Case Management	12/30/2010	02/28/2011	Incomplete	
- Page:** 1
- Add** button

Section V Cont...

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.*

Status	Response Notes	Created By
Rejected	It is possible that a rejection does not fit in ...more (see tooltip)	100210
Submitted	It is possible that a rejection does not fit in the response box. To view the rest of the message hover the cursor over	

Section VI

How to Enter a GPRA

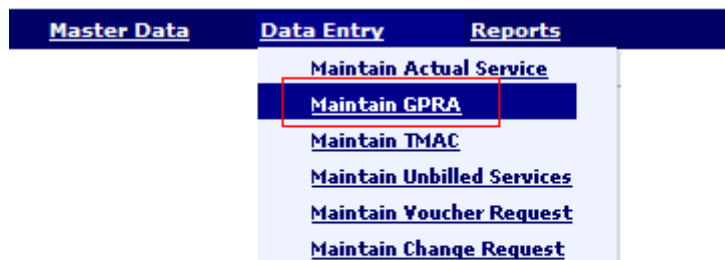
(Completed by the case manager)

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 button.

The screenshot shows a search interface with a dropdown menu labeled "Client ID" containing the value "50002173" and a "Search" button. Below this is a table with two columns: "Client ID" and "Name". The table contains one row with the client ID "50002173" and the name "ATR 3, Test Client". A red box highlights the search controls. Below the table, it says "Page: 1".

Client ID	Name
<input type="radio"/> 50002173	ATR 3, Test Client

Page: 1

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

The screenshot shows the same search interface as above, but now the radial button for the client "50002173" is selected (indicated by a green dot and a red box). To the right of the table, the client's name "Client: 50002173 - ATR 3, Test Client" is displayed. Below this is a "GPRA Summary" table with columns: "Interview Type", "Interview Date", "Status", and "Provider ID". Below the table, it says "Page: 1" and there is an "Add GPRA" button.

Client ID	Name
<input checked="" type="radio"/> 50002173	ATR 3, Test Client

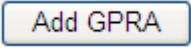
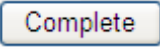
Page: 1

Client: 50002173 - ATR 3, Test Client
GPRA Summary

Interview Type	Interview Date	Status	Provider ID
----------------	----------------	--------	-------------

Page: 1

Section VI Cont...

4. Select the  button, pick the correct GPRA Interview Type and fill out all the required information. Be sure to use the  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	00002	Sections

Page: 1

Note: All subsequent GPRA's will be entered the same way.

Section VII

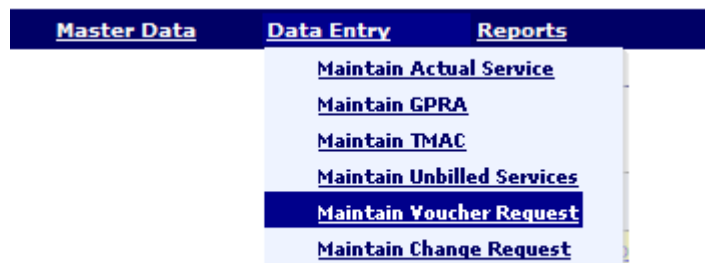
How to Request Treatment and Recovery Support Services (RSS) Vouchers

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.



Section VII Cont...

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

button.

Master Data Data Entry Reports

Request ID

Client ID

Client Name

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

Master Data Data Entry Reports

An episode already exists for the selected client. Please enter Voucher Request Details

Request ID

Client ID

Client Name

Voucher Request

Provider Id	Voucher Category	Service Start Date	Service End Date	Status	Response Notes	Created By
Page: 1						

Section VII Cont...

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.

Voucher Request

Provider Id	Voucher Category	Service Start Date	Service End Date	Status	Response Notes	Created By
Page: 1						

Provider Id

Voucher Category

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

Section VIII

How to Verify Voucher Possession

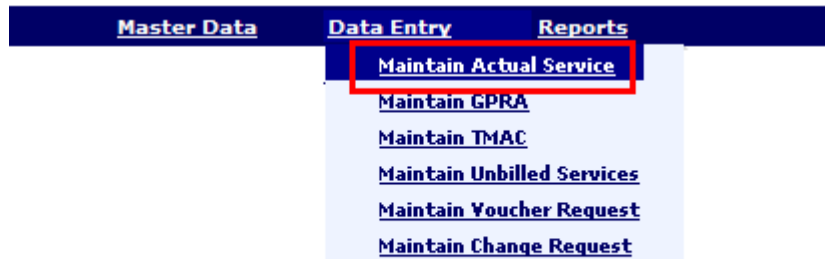
(Completed by any facility that will be billing on a voucher)

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.



Section VIII Cont...

- 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.

Client ID.	50002173	Search	
<input type="radio"/>	V300000012	50002173	ATR 3, Test Client
Page: 1			

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

Voucher ID	Client ID	Client Name
<input checked="" type="radio"/> 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

- Verify the correct Voucher Categories are present.

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

Section IX

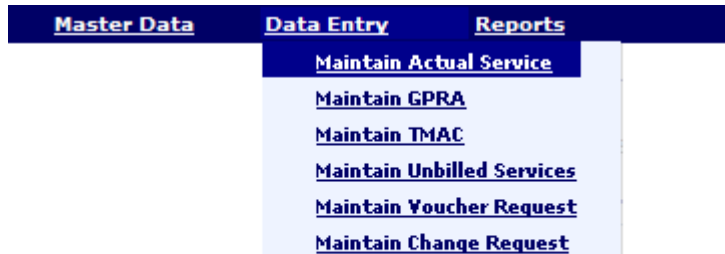
How to Bill for Services

(Completed by any facility with an assigned voucher)

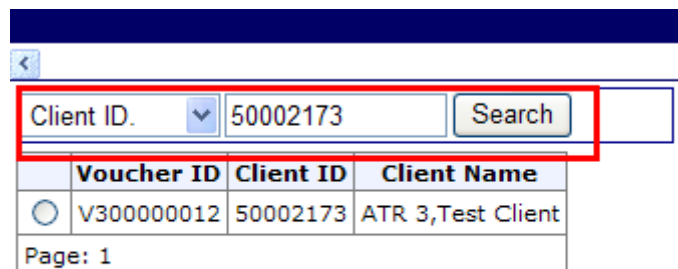
Only the provider ID that has assigned vouchers will be able to bill on them.

Instructions

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.)



The image shows a search interface. At the top, there is a dropdown menu with a left arrow icon. Below it, there is a search form with a dropdown menu labeled 'Client ID.' and a text box containing '50002173'. To the right of the text box is a 'Search' button. Below the search form is a table with the following data:

	Voucher ID	Client ID	Client Name
<input type="radio"/>	V300000012	50002173	ATR 3,Test Client

Page: 1

Section IX Cont...

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. <input type="text" value="50002173"/>	<input type="button" value="Search"/>					
<input checked="" type="radio"/>	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 <input type="text" value="All"/>						
Service Type <input type="text" value="All"/> <input type="button" value="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					
<hr/>						
Voucher Category	<input type="text" value="All"/>					
Service Type	<input type="text" value="All"/> <input type="button" value="Search"/>					
<hr/>						
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	

Section IX Cont...

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	Auth
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	Deleted
Page: 1						

[Add](#)

Section IX Cont...

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

Actual Service Details:

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

Page: 1

Voucher Category

Service Type

Service Date

Units

Amt(\$)

Status

Hold

Service Start Date

Service End Date

Provider ID

Created By

Created Date

Updated By

Updated Date

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.

The screenshot shows a software interface with a navigation bar at the top containing 'Master Data', 'Data Entry', and 'Reports'. The 'Data Entry' menu is open, showing options: 'Maintain Actual Service', 'Maintain GPRA', 'Maintain TMAC', 'Maintain Unbilled Services' (highlighted with a red box), 'Maintain Voucher Request', and 'Maintain Change Request'. Below the menu, there are input fields for 'Client Id : 50002173', 'Voucher Id : V300000012', 'Voucher Category' (set to 'All'), and 'Service Type' (set to 'All'). A 'Search' button is visible. Below these fields is a section titled 'Authorized Service Details:' containing a table with columns: 'View All', 'Voucher Category', 'Service Type', 'Auth', 'Avl', 'Avl(\$)', and 'Duration'. The table lists several services with their respective categories and costs. At the bottom of the table area, it says 'Page: 1 2 Next'.

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	

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).

The screenshot shows a search criteria section with a dropdown menu for 'Unbilled Services' set to 'On Hold'. There is a search button and a text input field. To the right, summary statistics are displayed: 'Total Services : 13' and 'Total Amount : \$8725.08'. Below this is a section titled 'Unbilled Service Details:' containing a table with columns: 'Transaction Id', 'Voucher Id', 'Client Id', 'Client Name', 'Voucher Category', and 'Service Type'. The table lists three transactions with their respective details.

<input type="checkbox"/>	Transaction Id	Voucher Id	Client Id	Client Name	Voucher Category	Service Type
<input type="checkbox"/>	24	V300000004	30002167		Case Management	Client Incentive
<input type="checkbox"/>	26	V300000004	30002167		Case Management	Transportation - mileage
<input type="checkbox"/>	27	V300000004	30002167		Service Member/ Veteran Outpatient Treatment	Life:WIRE Monthly

Section X Cont...

- 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).

Master Data Data Entry Reports

Search Criteria:

Unbilled Services On Hold Total Services : 5

All Search Total Amount : \$750

Unbilled Service Details:

<input checked="" type="checkbox"/>	Transaction Id	Voucher Id	Client Id	Client Name	Voucher Category	Service Type	Service Dt	Units	Am
<input checked="" type="checkbox"/>	31303	V300002134	30002155	test, girl	Assessment	Assessment services	03/05/2009	1	\$150.
<input checked="" type="checkbox"/>	31301	V300002133	30002153	Test, Guy	Assessment	Assessment services	03/08/2009	1	\$150.
<input checked="" type="checkbox"/>	31297	V300002132	30002152	Test, Client	Assessment	Assessment services	04/06/2009	1	\$150.
<input checked="" type="checkbox"/>	31306	V300002135	30002156	testerson, test	Assessment	Assessment services	04/08/2009	1	\$150.
<input checked="" type="checkbox"/>	31300	V300002128	30000396	Test Client, ATR2	Assessment	Assessment services	12/01/2008	1	\$150.

1

- 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.

By approving these billings, I certify that I am the duly authorized representative of this organization/entity, and that the services being billed through this electronic voucher system were rendered in accordance with the CARE Policies and Procedures, and can be verified with documentation maintained in the clients files

Clear All Approve

Internet 100%

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

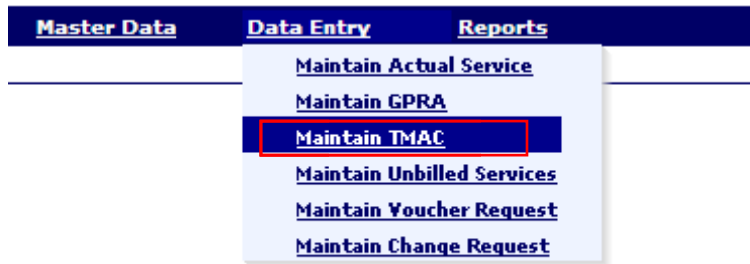
Section XI

How to Enter a TMAC Session

(Completed by the outpatient facility)

Instructions

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 button.

Client ID	▼	50002173	<input type="button" value="Search"/>
Client ID	Name		
<input type="radio"/>	50002173	ATR 3, Test Client	
Page: 1			

Section XI Cont...

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

Client ID

	Client ID	Name
<input checked="" type="radio"/>	50002173	ATR 3, Test Client

Page: 1

Client: 50002173 - ATR 3, Test Client

Assessments

	Intake ID	Center Name
TMAC Assessment	E300000012	

Page: 1

4. Select the [TMAC Assessment](#) link, and then click on the button for the TMAC session to be entered.

Client: 50002173 - ATR 3, Test Client

Assessments

	Intake ID	Center Name
TMAC Assessment	E300000012	

Page: 1

TMAC Summary

Session Date	Risk Total Score	Protective Total Score	Provider ID
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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.

Client 50002173 - ATR 3, Test Client Session Date * 01/01/2011 (mm/dd/yyyy)

Substance Use Status *

1. Substance Use * Any substance use ▾

Risk Factors *

2. Potential High Risk Situations * Spent time with friends/ others who use but weren't using during that time ▾

3. People, Places, Things * 1-2 encounters per week ▾

4. Mood * Depressed less than half the time or lessening ▾

5. Confidence * 90% or better ▾

6. Cravings * 2-3 times per week ▾

Add one (more than "a little" bother)

Risk Total Score: 5

Protective Factors *

7. Coping Skills * Sometimes used coping skills ▾

8. Sober Activities * None ▾

9. Personal Goals * Meaningful activity toward goal ▾

10. Positive Experiences * 25-50% of the time ▾

11. Support Groups * No attendance at a group ▾

Protective Total Score: 4

[Back to Summary](#) **Save** **Cancel**

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

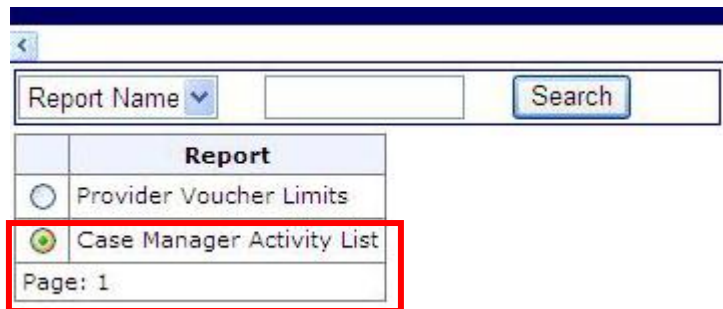
There is a new report in the VMS designed for Case Managers. This report gives Case Managers access to detailed information on each client’s treatment / recovery progress.

Instructions

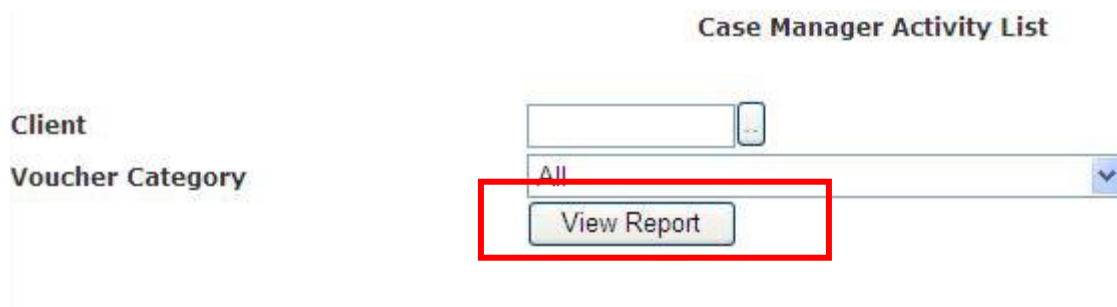
1. Login to the VMS, then go to “Reports”, then “Provider Reports.”



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...



California Access to Recovery Effort (CARE)

Case Manager Activity List

Case Manager : 100002 -						Voucher ID : V50000002
Client : 50000029 -						
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