



Page 1: High level - recommended for staff members with some proficiency using WaMS

Page 2: Recommended for everyone

Step #	Action	Who?	How
1	Create Profile	CSB	People tab -> Search -> OK to Set Up New Person <u>OR</u> Add Person-> Complete Screens
2	Assign CSB	WaMS	<i>Systematically identified by WaMS when the authorized user belongs to a CSB Organization Unit</i>
3	Assign SC <i>Important: No reminder message. CSB does not receive Alerts, individual does not show in My List.</i>	CSB	Assignments tab -> SC Assignment -> Filter -> Check Individual's Name, Primary Staff Assignment, Click Assign
4	VIDES	CSB	People tab -> Search -> Summary -> Screening & Assessment -> VIDES -> Create New -> Start -> Complete Questions -> Submit
5	Add to (Program) Waitlist	CSB	Search -> Summary -> Bottom of Summary OR Search -> Add to Waitlist
6	Make Slot Available	DBHDS	N/A
7	Create Wave	DBHDS	N/A
8	Add Slot	DBHDS	N/A
9-11 (can be done in any order, multiple times)	Complete Enrollment Status	CSB	Search -> Summary -> Programs -> Enrollment Status -> Create New -> Select Waiver -> ID Enrollment Status -> Save
	Create Individual Support Plan (ISP)	CSB	Search -> Summary -> Individual Support Plan -> Create New -> ID Waiver -> Enter Information -> Save <i>(As Applicable: Add Proposed Providers, Upload Attachments and/or Create Notes)</i> Click Complete_
	Create New Service Authorization (SA)	CSB	Search -> Summary -> Service Authorization -> Create New -> Create Service Authorization -> Add Note if applicable
	<i>Add Service Detail(s)</i>	<i>Provider</i>	N/A
	View Alert	CSB	Alerts tab -> search for alert if necessary (Provider has submitted service authorization for review.)-> click Go
	Review the Service Detail(s)	CSB	Click Review -> Complete all required fields -> Adjust if necessary -> Save
	<u>Optional -</u>	CSB	1. Add -> Complete required fields -> Click Save

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	<u>Add additional Service Line Item</u>		
	<i>Optional</i> Add Proposed Provider, Attachments or Notes	CSB	Click on desired action -> follow directions on each screen -> Save
	<u>Submit SA for PA Review</u> <i>(Essential Step)</i>		Click on Submit for Review button -> Click Confirm

*Note: An enrollment status for the person must be Active before creating an SA.

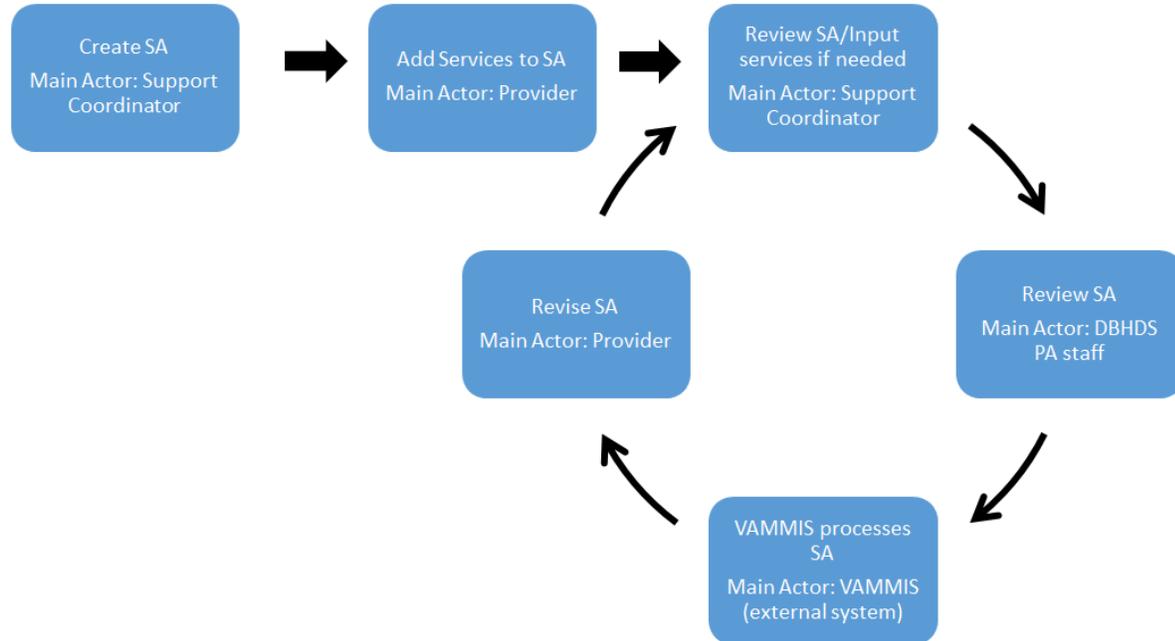
Add additional Phone Numbers, Email Addresses and Addresses

Search -> Overview -> Phone #, Email or Address -> Click Details -> Click Add Person's (make selection) NOTE: Only the Primary Phone, Email and Address shows in the Overview
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Page 1: Recommended for those with an understanding of how WaMS works

Page 2: Recommended for everyone

Service Authorization – Overview of Process



Add Additional Service Lines Before Submission for PA Review

Search -> Summary -> Programs -> Service Authorization -> Service Authorization – List -> View -> Click Add -> Complete Required Fields -> Save -> Click Submit for Review once all items added

NOTE:

- A Service Authorization can only have 18 service lines. After 18 lines, the system will automatically create a new Service Authorization
- Submit for Review must be clicked to send the SA to the PA Staff for review

View, Edit or Delete Specific Service Lines Before Submission for PA Review

Search -> Summary -> Programs -> Service Authorization -> Service Authorization – List -> Click View, Edit or Delete (next to line item) -> Complete Required Fields -> Save -> Click Submit for Review

NOTE:

- A Service Authorization can only have 18 service lines. After 18 lines, the system will automatically create a new Service Authorization
- Submit for Review must be clicked to send the SA to the PA Staff for review
- SAs submitted for review cannot be deleted