Department of Behavioral Health and Developmental Services

Virginia

Waiver Management System

Provider Navigation Manual

August 24, 2016

Waiver Management System

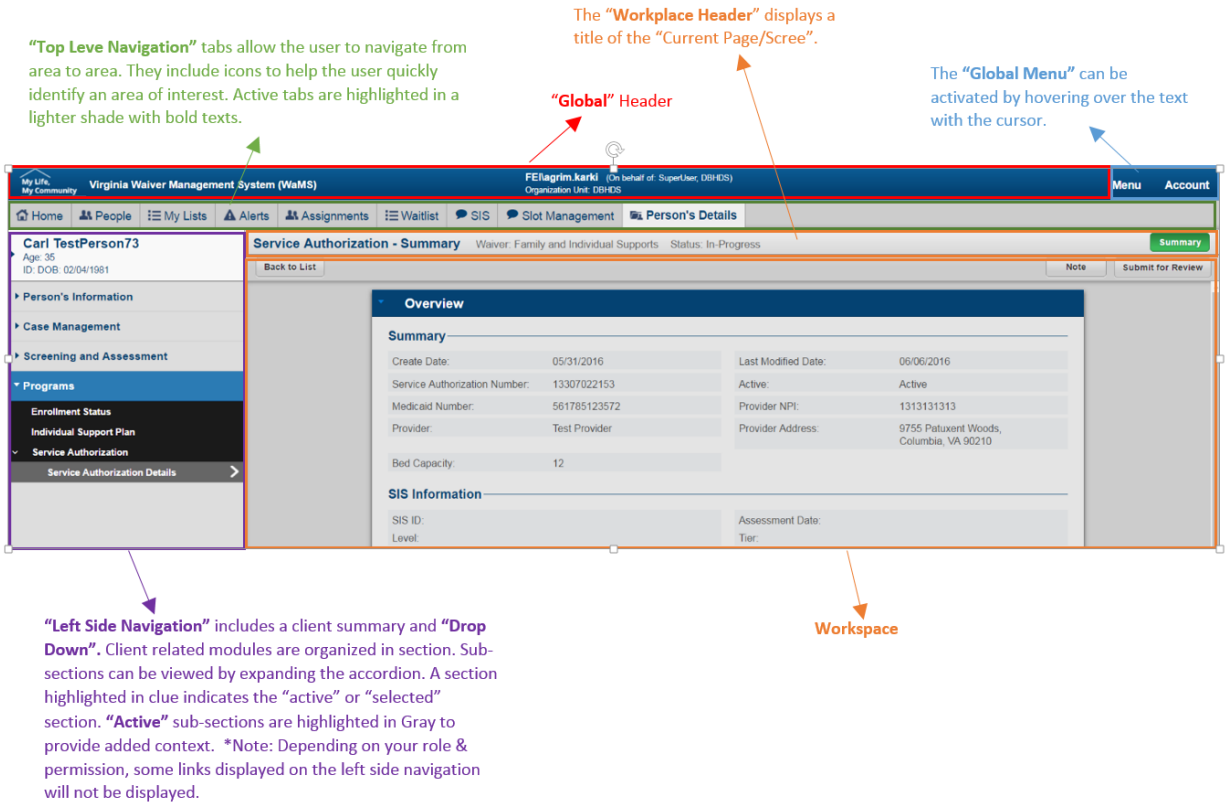
1 WaMS Navigation 1
2 System-wide Controls 1
2.1 Input Fields 1
2.1.1 Text Boxes 1
2.1.2 Drop-down Lists / Combo Boxes 2
2.1.3 Check Boxes 2
2.1.4 Radio Buttons 2
2.2 Messages 3
2.2.1 Success Messages 3
2.2.2 Error Messages 3
2.2.3 Information messages 3
2.3 Buttons and Links 3
2.3.1 Expand All Button 3
2.3.2 Collapse All Button 4
2.3.3 Create New Button 4
2.3.4 Edit Button 4
2.3.5 Search Buttons 4
2.3.6 Filter Buttons 4
2.3.7 Clear Button 5
2.3.8 Save Button 5
2.3.9 Discard Button 5
2.3.10 Submit Button 5
2.4 Links 5
2.4.1 Table Links 5
2.4.2 Back To List/Back to Summary Link 6
2.4.3 Cancel Link 6
3 Login 6
3.1 How to Login 6
3.2 Create New Password/Reset Forgotten Password 9
3.3 Change Password 10

3.4 Forgot Username 12
4 WaMS Top-Level Navigation 12
4.1 WaMS Home 13
4.1.1 Announcements 13
4.1.2 Recent Alerts 13
4.1.3 Recent System Updates 13
4.1.4 Upcoming Events 13
4.1.5 Technical Support 13
4.1.6 Training Manuals, Webinars, and FAQs 13
4.2 My Lists 14
4.3 Alerts 14
5 WaMS Left Side Navigation 15
6 Global Menu 15
6.1 Main 16
6.2 Administration 16
6.3 My Information 16
6.4 Feedback 17
6.5 Print 17
7 User Directory 18
8 My Information 19
8.1 My Profile 19
8.2 My Organization 19
8.3 My Staff 20
8.4 Create Staff 20
8.4.1 Add User Role 21
8.5 Edit Staff 22
8.5.1 Edit General Information: 22
8.5.2 Add/Edit Phone Numbers: 22
8.5.3 Delete Existing Phone Number 23
8.5.4 Add Attachments to Staff Profile 23

8.5.5 Edit User Roles 24
8.5.6 View Delegations 24
9 Global Print 24
10 Person's Details – 26
10.1 Add an Attachment 26
11 Case Management 26
11.1 Add Service Notes 26
11.1.1 View Service Notes 27
11.1.2 Print Service Notes 28
12 Screening and Assessment 28
12.1 Virginia Individual Developmental Disabilities Eligibility Survey (VIDES) 28
12.1.1 VIDES Result (Details) 28
12.2 Support Intensity Scale (SIS) 29
13 Programs 29
13.1 Individual Support Plan 29
13.1.1 Add Notes to an In-Progress ISP 30
13.1.2 Add an Attachment to an in-progress ISP: 30
13.1.3 View an Attachment on a Completed ISP 30
13.2 Service Authorization 31
13.2.1 Add Services to a Service Authorization 32
13.2.2 Revise a Service Authorization with an Service Authorization # 34
14 My Lists 35
14.1 Enrollment 35
14.2 Recertification 35
14.3 Service Authorization 36

1 WaMS Navigation

The image below provides an overview of the standard layout of WaMS VA screens. It provides a quick description of the different elements on the screen and their significance. This can be a guide to navigate quickly through the system. For new WaMS users, it would be helpful to print a copy of this screenshot and place it close to your workstation. *Note: The navigation screen title bar, menu, tabs (both across the top and on the left), fields, information and messages vary according to role and permissions.



2 System-wide Controls

2.1 Input Fields

Entering data in various forms across WaMS uses one of the following mechanisms:

2.1.1 Text Boxes

Text boxes are used whenever free text or values must be entered. To enter text into a text box, click on the text box and begin typing.

Tip:
- Some input fields are required and are highlighted in yellow with one red star by the associated field label.

2.1.2 Drop-down Lists / Combo Boxes

Drop-down lists / Combo boxes are used whenever there is a list of options to choose from. To use a combo box, simply click on the arrow located to the far right of the combo box. A drop-down menu will appear. To select the response, simply click on the item from the listing.

2.1.3 Check Boxes

Check boxes are used to select one or more options from a list of available options. To activate the check box, click on the box next to the desired option or options.

2.1.4 Radio Buttons

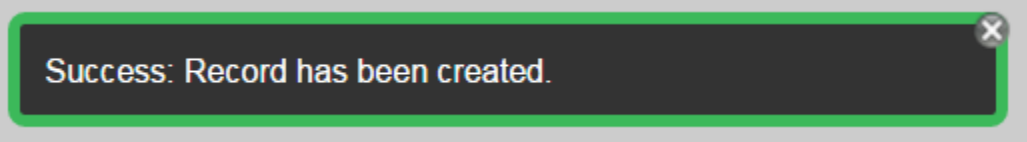
Radio buttons are used to select one option from a list of available options. To activate the radio button, click on the round button next to the desired option.

2.2 Messages

There are several messages notification for the users throughout the WaMS system. The primary purpose of the notification is to let the users know what the system has recorded or if any updates are needed to input any missing information.

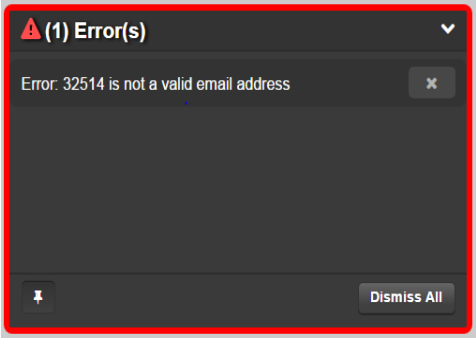
2.2.1 Success Messages

This notification indicates the system successfully processed the information and is outlined in green.



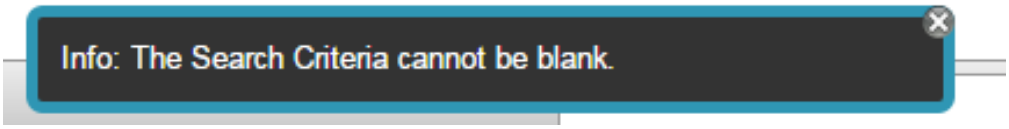
2.2.2 Error Messages

This notification indicates information is missing or more information is needed to proceed to the next task and is outlined in red.



2.2.3 Information messages

This notification provides high level overview information and is outlined in blue.

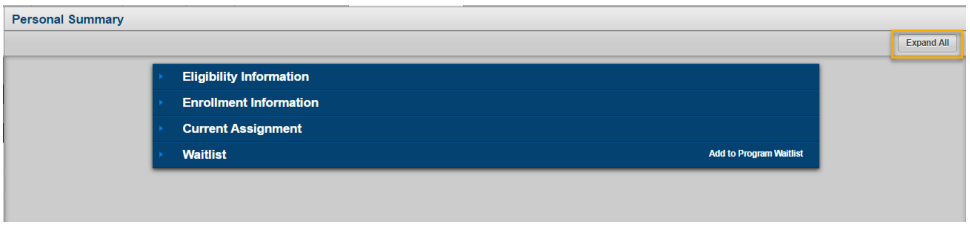


2.3 Buttons and Links

There are several buttons throughout the WaMS system. The buttons or links on the top right of the workspace take the user forward. The action buttons or links that take user back to previous screen are mostly on the top left of the workspace.

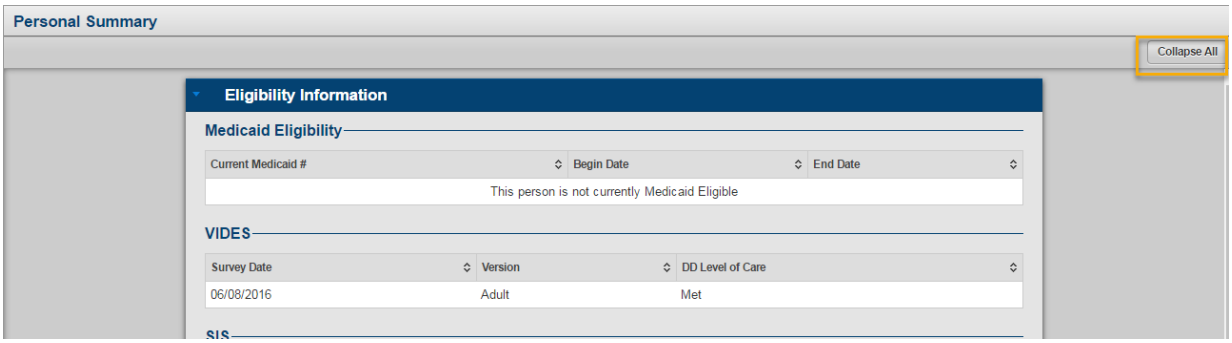
2.3.1 Expand All Button

This button expands all panels displayed on the current form (typically for a long form).



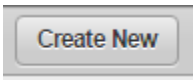
2.3.2 Collapse All Button

This button collapses all panels displayed on the current form or on the task list.



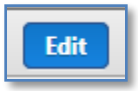
2.3.3 Create New Button

This button allows users to create a new form. There will be times (Enrollment Status, CSB assignment) when the only option will be to create a new form rather than edit the current form.



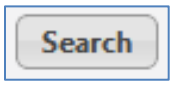
2.3.4 Edit Button

This button allows users to edit the form available in the main workspace. Edit is only available for certain forms.



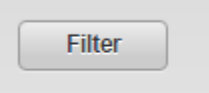
2.3.5 Search Buttons

This button allows users to initiates a search based on the criteria entered.



2.3.6 Filter Buttons

This button allows users to filter search results based on the criteria entered.



2.3.7 Clear Button

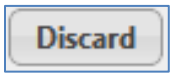
This button allows users to clear the search criteria previously entered.

2.3.8 Save Button

This button allows user to save the information entered and returns to the previous page. In most instances, the form remains editable in a saved state. As mentioned above, all the light-yellow fields (fields with one red star) need to be filled out in order to save a form.

2.3.9 Discard Button

This button allows users to discard a form that was saved or submitted.



2.3.10 Submit Button

This button allows users to submit the information. Once submitted the form will no longer be editable. Alerts to other agencies/users within WaMS may be generated at that time.

2.4 Links

2.4.1 Table Links

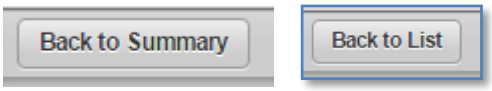
These links allows users to take an action specific to the record displayed on the list. These actions

usually depend on the current workflow status of the record.

Line #	Service	Frequency Code	Requested Units	Authorized Units	Requested Start Date	Requested End Date	Authorized Start Date	Authorized End Date	Status	Actions
1	Community-Based Crisis Supports (H0040)	Hour	5		06/12/2016	06/18/2016				View Edit Delete

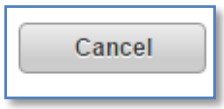
2.4.2 Back To List/Back to Summary Link

This link allows the user to go back to the previous list or summary screen when the current form does not have a cancel action (e.g. Task list)



2.4.3 Cancel Link

This link allows the user to cancel the current data entry and takes the user to the previous page without saving the information entered



3 Login

3.1 How to Login

Purpose of This Function

Users must login to WaMS prior to having access.

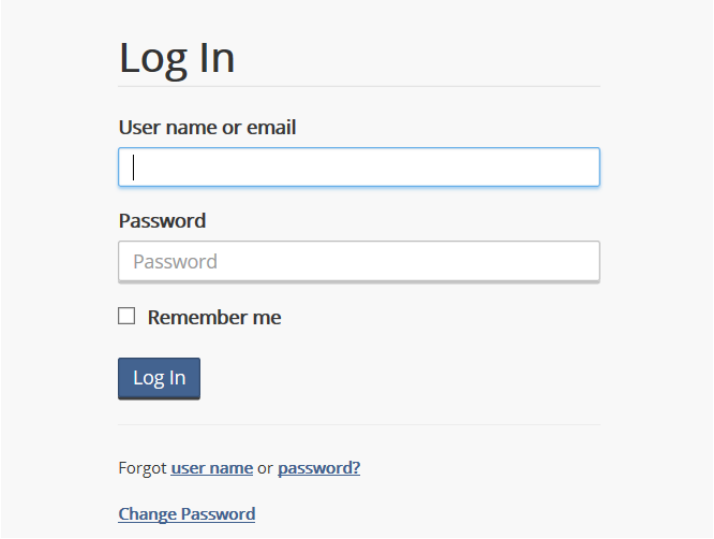
Who Can Use This Function

Any user of WaMS

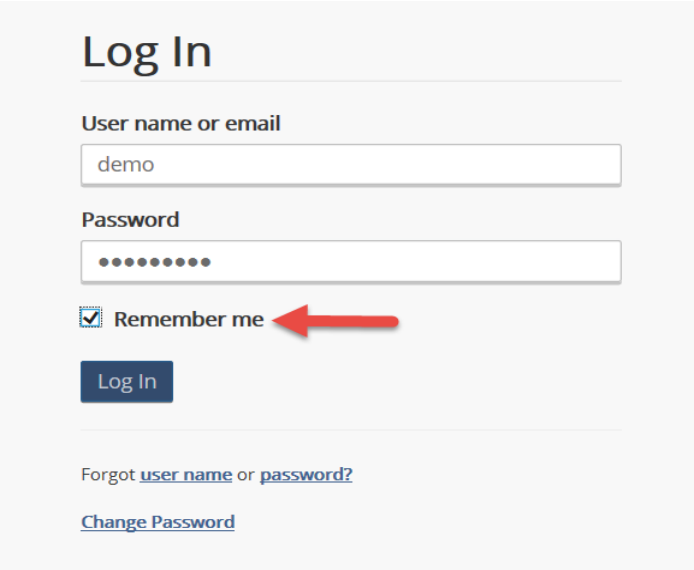
How to Use This Function

1. Go to https://www.wamsvirginia.org

2. Unless the user is already logged in, the user will see the main Login Page that asks for both the Username/Email and the Password



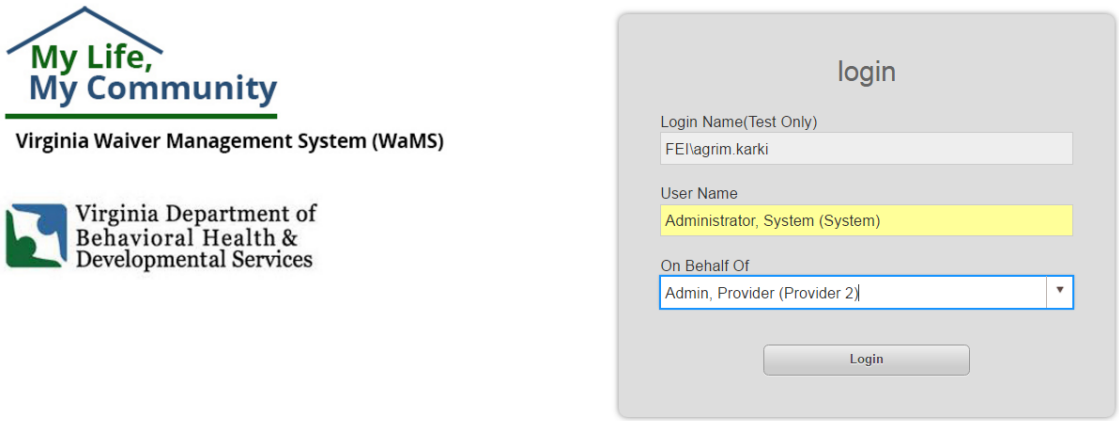
3. Enter the assigned Username or Email Address into the first field labelled 'User name or email'
4. Enter the chosen Password in the password field
5. The option to Remember Me will allow the user's information to be saved on this browser for later use, if desired



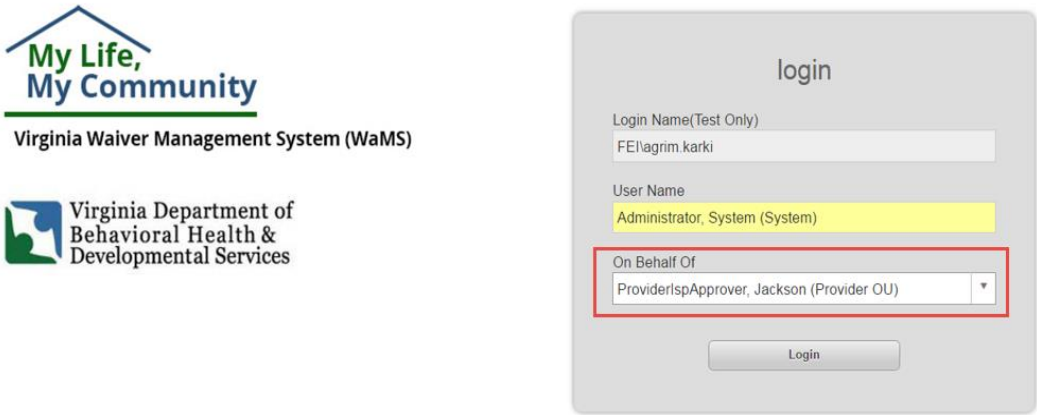
6. Click Log In to proceed

Please Note: If the user only has the power to login with one role, then WaMS will automatically log into the system, and the next steps will not be necessary.

7. User will be taken to the Authorization page.



a. Users who do not have at least one delegation in their Staff Profile:
   i. Enter staff name that the user is delegating in as in On Behalf Of field or leave blank to login as user
   ii. Click Login



Tips:
- If an error is received regarding 'Invalid username or password', verify that the information has been entered correctly.
- When the user logs on for the first time, a password will need to be created. See: Forgot/Create Password instructions.
- To setup delegations, see: Edit Staff Profile instructions.

3.2 Create New Password/Reset Forgotten Password

Purpose of This Function

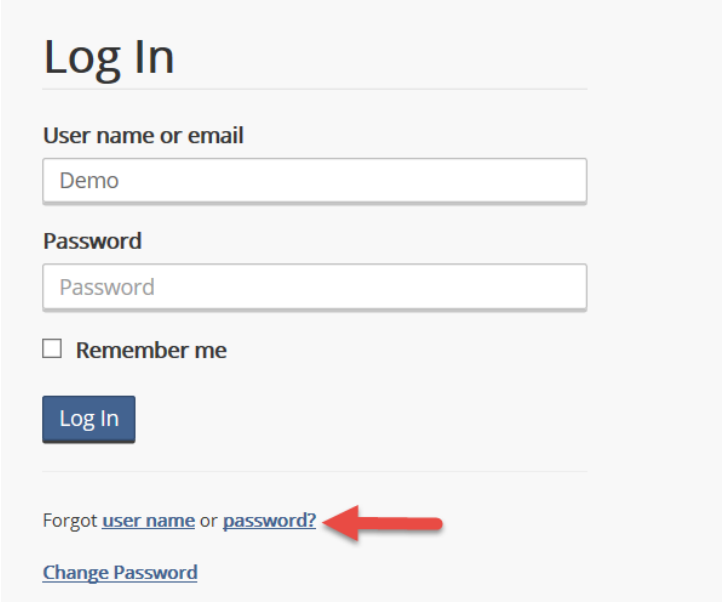
Creating a new password without having to enter the old password.

Who Can Use This Function

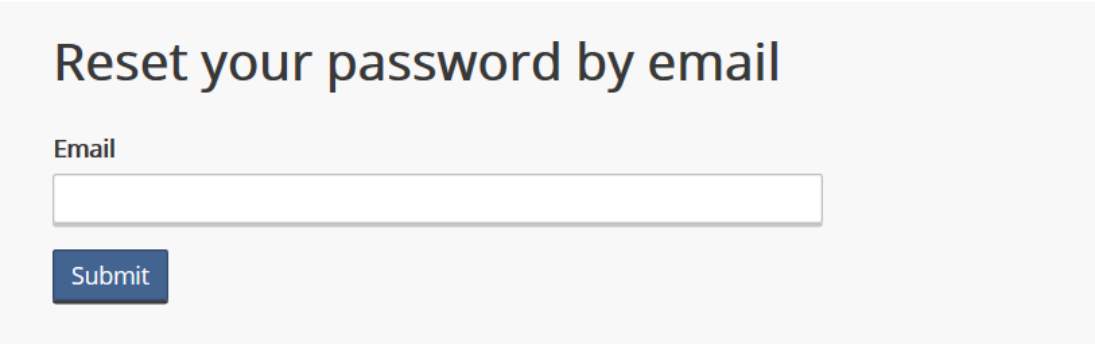
Any user of WaMS

How to Use This Function

1. On the Login screen, under the Login button, click the underlined word Password in the question: Forgot user name or Password?



2. Enter the email address



3. Click Submit

4. After successful submission, a unique link will be sent to the email address entered that will allow the user to create a new password

Tips:

- If the 'Invalid email address!' error is received, verify the email address entered is the one associated with this user's WaMS account.
- The Help Desk is available between 7am – 7pm EST if the user account is locked as it will need to be unlocked.
- Forgot Password Form should only be submitted once, if submitted twice, click the most recent email as the previous email link will no longer be valid.
- If the Reset Password email is not received within 10 minutes, check the spam folder of the email address it was sent to.

3.3 Change Password

Purpose of This Function

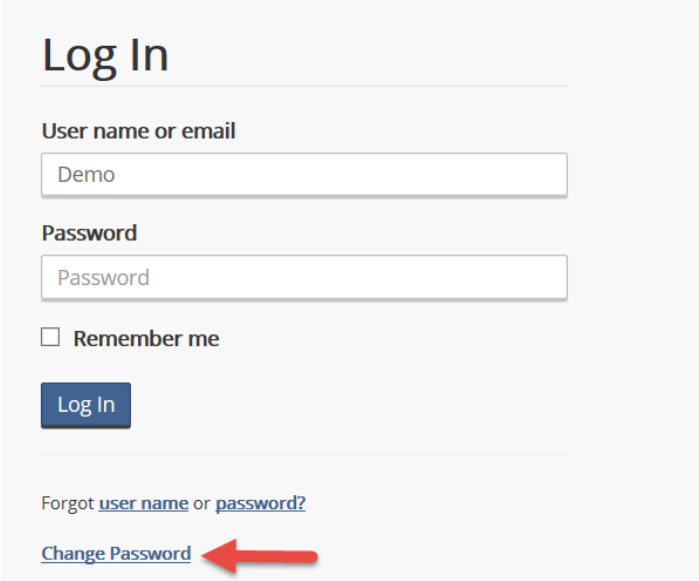
Change the password associated with username from one password to another.

Who Can Use This Function

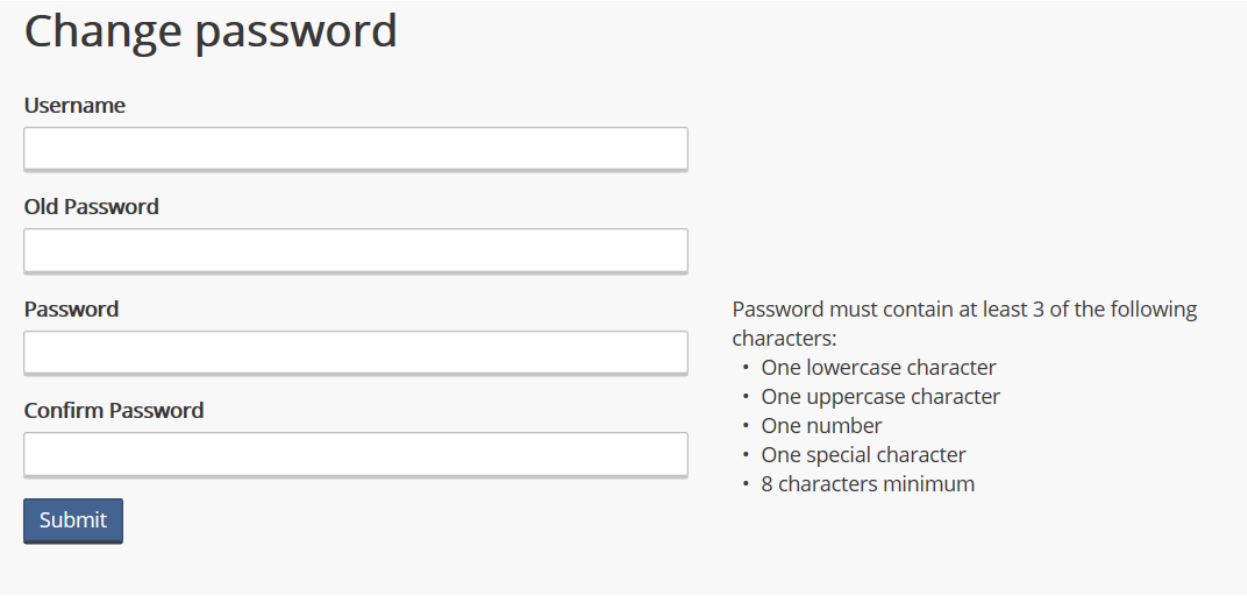
Any user of WaMS

How to Use This Function

1. On the Login screen, click Change Password at the bottom.



2. The user will be taken to a new screen labelled Change Password
3. In appropriate boxes, enter Username, Old Password, Password (new), and Confirm Password.
4. Click Submit



Tip:
- All passwords must be at least 8 characters and include 3 of the following character types: lowercase, uppercase, number, or special character

3.4 Forgot Username

Purpose of This Function

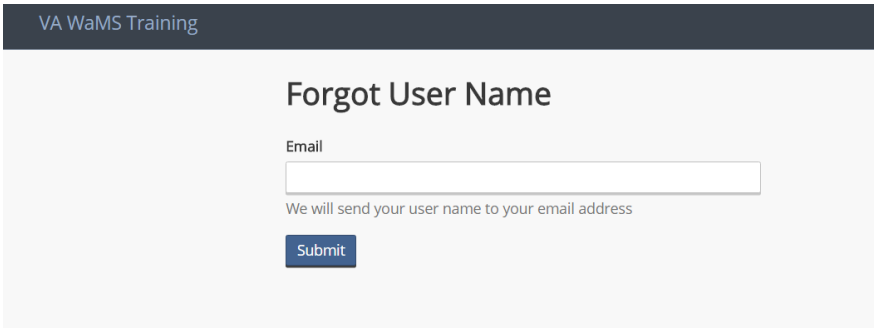
Email a forgotten Username to the user

Who Can Use This Function

Any user of WaMS

How to Use This Function

1. On the Login screen, under the Login button, click the underlined words User name in the question: Forgot user name or Password?
2. User will be directed to a new page labelled Forgot User Name
3. Enter Email Address associated with WaMS login
4. Click Submit



5. After successful submission, the username will be emailed to the email address entered

Tip:
- If an error message appears for 'Invalid email address', verify the email address entered is the one associated with this user's WaMS account

4 WaMS Top-Level Navigation

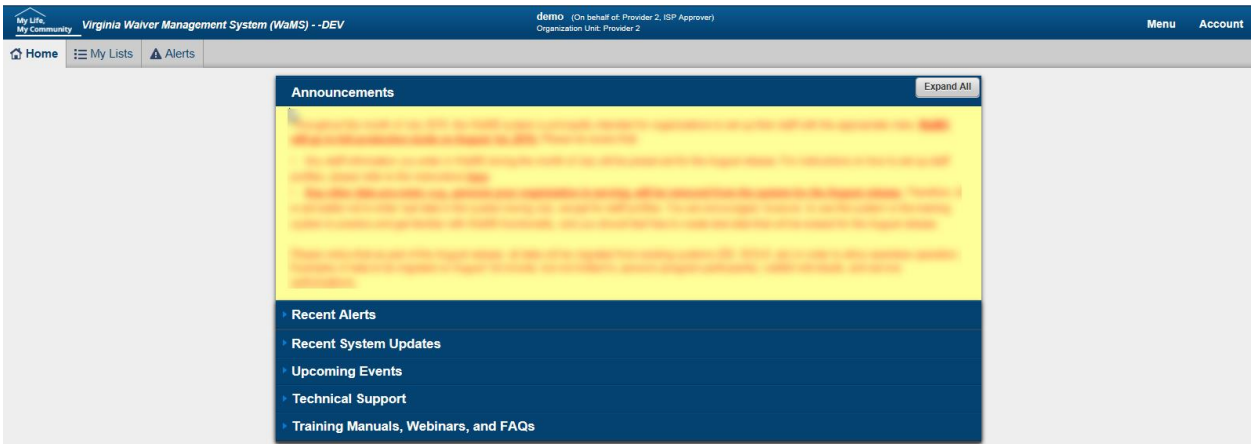
The top-level navigation is useful for high-level navigation through the system. The following tabs are

included in the top-level navigation: Home, My Lists, Alerts and Assignments. Available tabs are based on user role and permissions.

Each of these tabs is described in detail below.

4.1 WaMS Home

The Home page is the landing page when you first login to the WaMS VA system. This page provides all the tools and materials necessary to use the system with ease.



The Home tab consists of the following sections:

4.1.1 Announcements

This section will provide the users important announcements as needed

4.1.2 Recent Alerts

This section describes systems alerts for WaMS

4.1.3 Recent System Updates

This section will display announcements regarding WaMS system enhancement based on user requirements

4.1.4 Upcoming Events

This section will display information about any upcoming events that agencies may want to attend. For example, information about in-person WaMS system trainings or training webinars will appear here

4.1.5 Technical Support

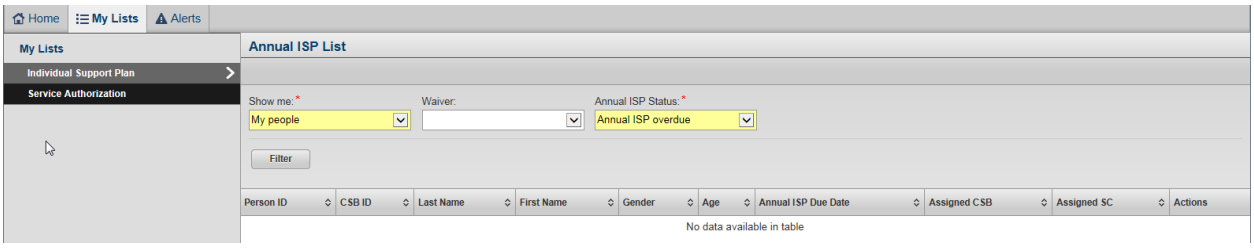
This section will contain contact information, such as the helpline number, for technical support.

4.1.6 Training Manuals, Webinars, and FAQs

This section provides abundant detailed instructional materials, guides, presentations and video recordings on how to use the WaMS system. Materials will include user manuals (as mentioned in the introduction), recordings of webinars provided by topic (if applicable), and detailed additional information about various modules across the systems.

4.2 My Lists

My Lists tab allows users to search for a subset of persons based on a certain criteria or category as defined in the drop-down list. For example, users can view a list of all persons with Individual Support Plan (ISP) and Service Authorization status. The lists are available strictly based on the agency and role of the user logged in.

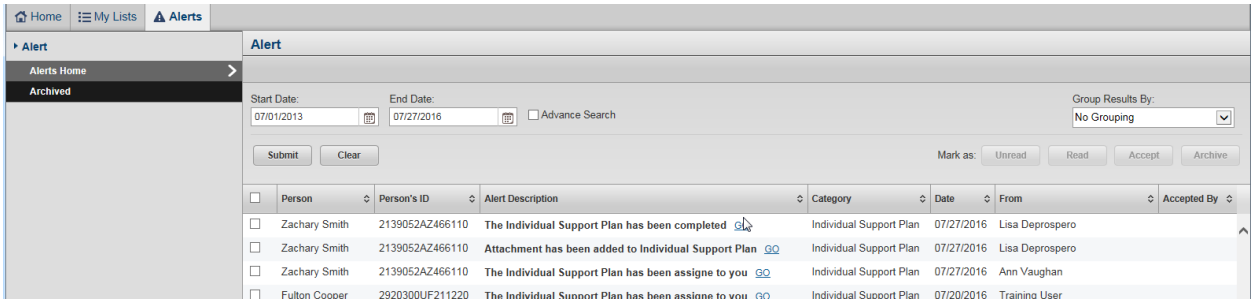


How to Use This Function

1. After clicking on the My Lists tab, select the types of program lists under the My List from the left side navigation
2. After selecting the program, click on the highlighted yellow drop-down menu and select a specific list
3. Then click on the Filter button to display the list

4.3 Alerts

The Alerts tab allows users to view and accept notifications from the different users in the system. Alerts inform the recipient that some type of action is required or has been completed. Alerts are specific to the logged-in user's role and assignments to specific tasks.

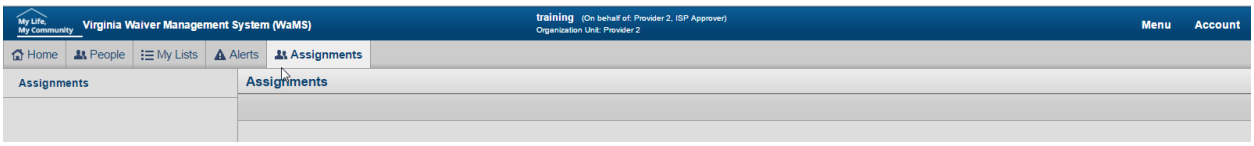


How to Use This Function

1. After clicking on the Alert tab, all alerts will appear chronologically, with the most recent alert appearing first. The user can sort alerts by Person's Name, Alert Description, Category, Date, the alert sender and who it was accepted by.
2. Selecting GO will open a new tab for the user to display the applicable page with more information about the alert

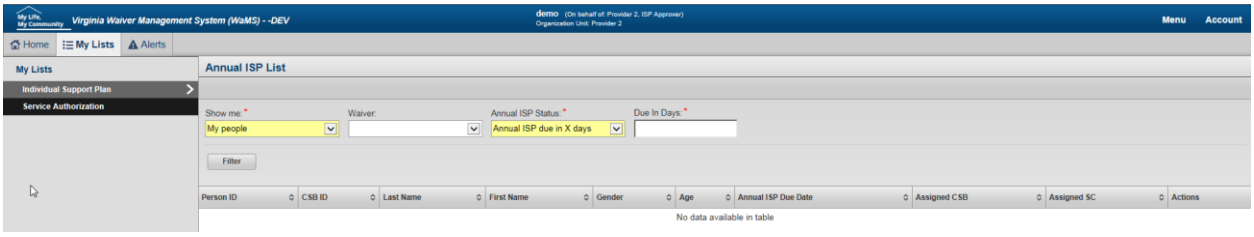
Tip:

- Emails received from Alerts will not contain PHI or PII data



5 WaMS Left Side Navigation

The left side navigation is used most frequently to navigate through various forms, after selecting top level navigation tab. The list of available menu items depends on the logged-in user's role as well as the current module/function being displayed. The menu item currently selected will be highlighted with an arrow displayed on the right.



6 Global Menu

This menu functionality is related more to global system functionality than to individual or program related activities.

Global Menu has the following options. Any of the menu options with a rightward pointing arrow is in turn another menu. The menu options are available strictly based on the agency and role of the user logged in.

- Main
- Administration
- My Information
- Feedback
- Print

Each of these options is explained below in detail.

6.1 Main

Click on Menu, then click on Main to see the Main sub-options. The Main sub-options are the same as the top-level navigation tabs, discussed in the sections above.

6.2 Administration

Click on Menu, then click on Administration to access the User Directory. (See: User Directory)

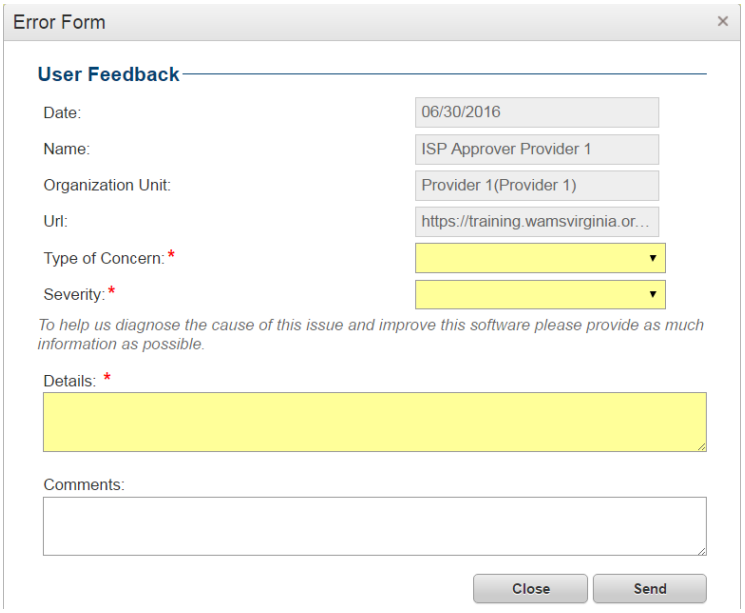
6.3 My Information

Click on Menu, then click on My Information to see the information on the user. (See: My Information)

6.4 Feedback

Click on Menu, then click on Feedback to see the Feedback sub-options. System errors or concerns can be reported and tracked via this Feedback link.

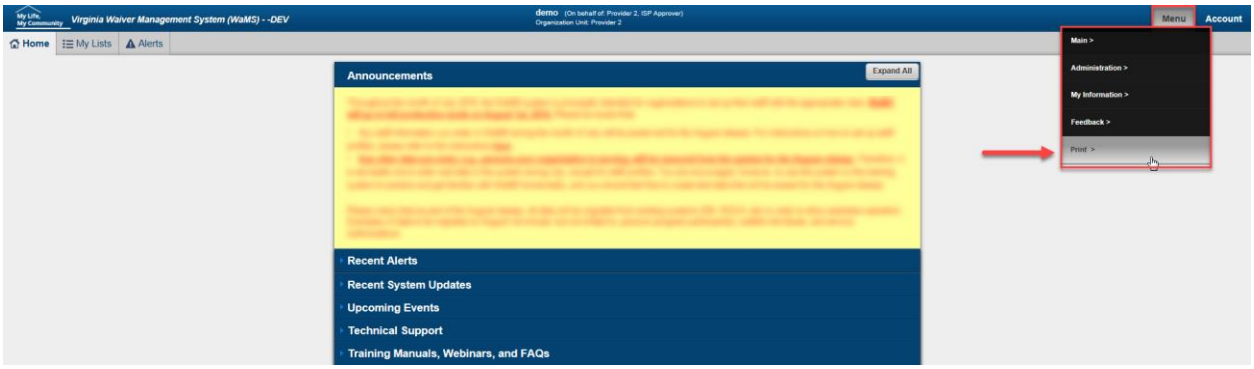
To enter feedback, select Create; the following popup will appear:



The link is automatically populated based on the user's current screen. Filling out the information and then clicking Send will automatically send the issue/concern to the Help Desk

6.5 Print

Click on Menu, then click on Print to print the current form with the standard print output. (See: Global Print)



7 User Directory

Purpose of This Function

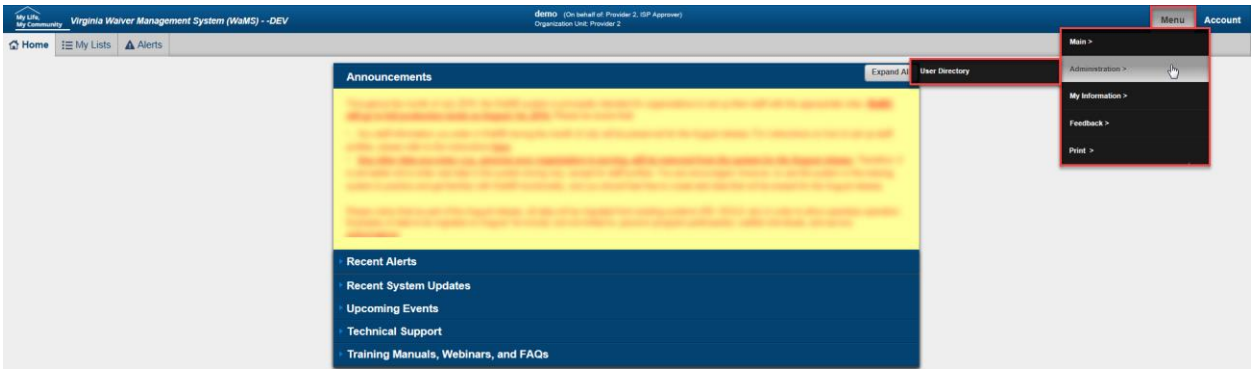
Search for and obtain information on any user in WaMS.

Who Can Use This Function

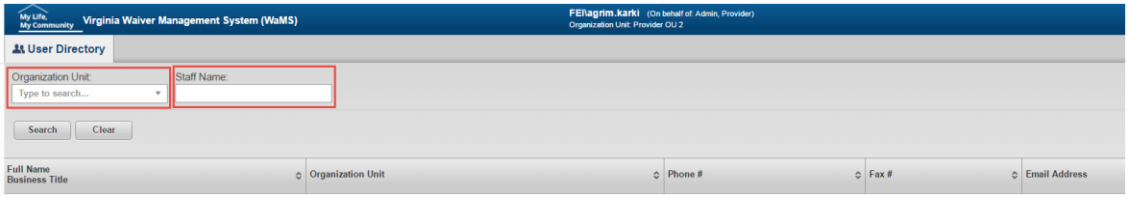
Any WaMS user

How to Use This Function

1. In the Menu file, open the Administration tab and open the User Directory



2. Enter information into the Organization Unit and/or Staff Name fields and click Search



3. Information can be sorted by Full Name, Organization Unit, Phone #, Fax# or Email Address

8 My Information

8.1 My Profile

Purpose of This Function

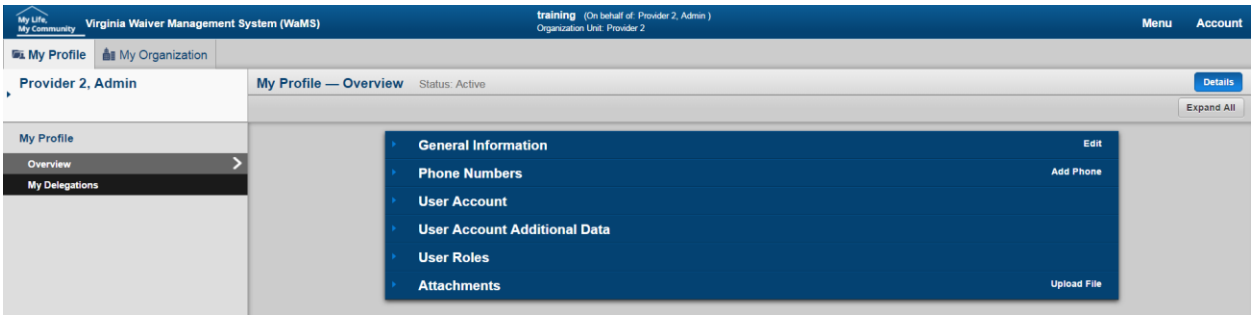
All WaMS user must have a personal profile to enroll individuals into the Virginia Wavier Management System.

Who can Use This Function?

Any WaMS User

How to Use This Function

1. In the Menu click My Information, then My Profile
2. Update the information as needed



8.2 My Organization

Purpose of This Function

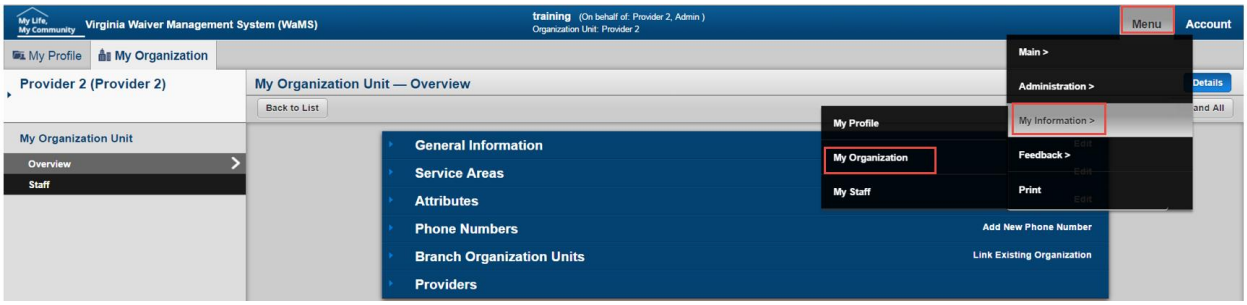
For the user to view the list of service(s) and care their organization provides.

Who can Use This Function?

Any WaMS User

How to Use This Function

1. In the Menu click My Information, then click My Organization



8.3 My Staff

Purpose of This Function

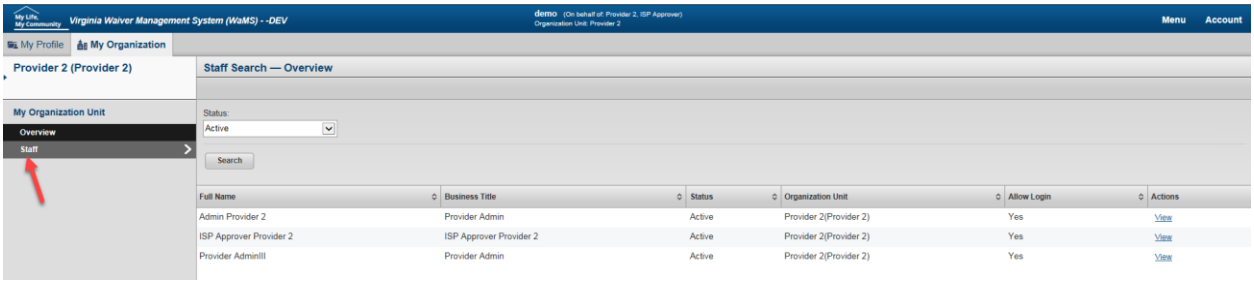
Locate existing staff

Who can Use This Function?

Any WaMS User

How to Use This Function

1. In the Menu click My Information, then My Staff ***or*** click Staff if in My Organization Unit, Overview



2. Staff members may search and view information on other Staff members

8.4 Create Staff

Purpose of This Function

Add Staff Profiles for new users of WaMS

Who Can Use This Function

DBHDS, DMAS, CSB, Providers with Admin access

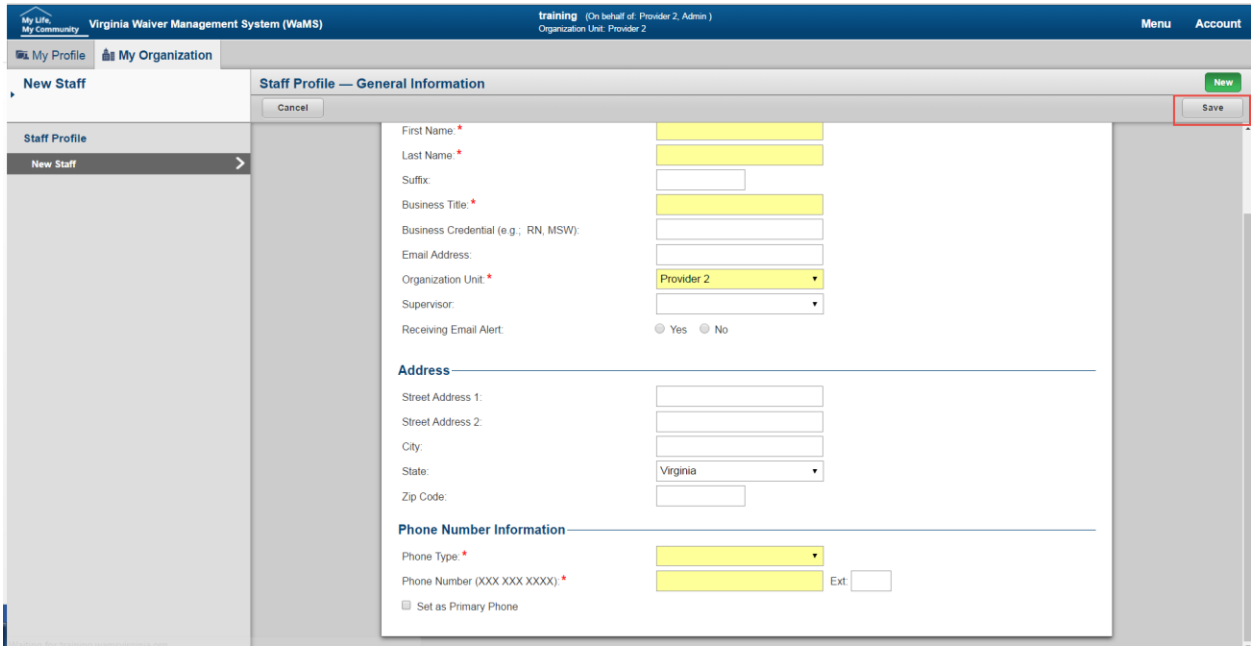
How to Use This Function

1. Navigate to the My Staff listing (See: My Information)

2. Click Create Staff on the right

3. Complete required fields in the Staff Profile – General Information screen

a. Complete optional fields with known information



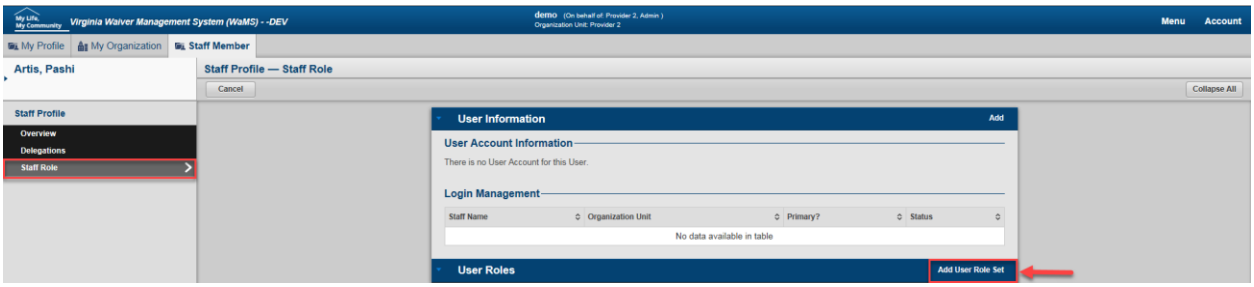
4. Click Save to generate Staff Profile

8.4.1 Add User Role

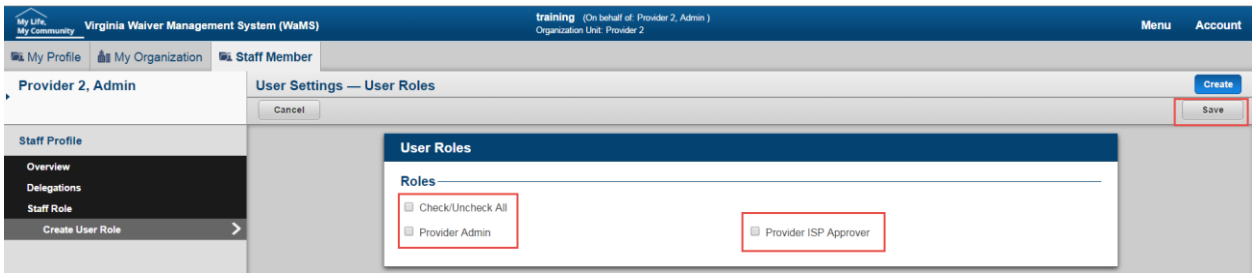
Tip:

- All Staff members must have at least one User Role set-up in order to use WaMS.

5. On the Left Navigation, click Staff Role then Add User Role Set



6. Click Add User Role Set
7. Select the appropriate role(s) for this New Staff



8. Click Save

8.5 Edit Staff

Purpose of This Function

Update Staff Profiles for existing users of WaMS

Who Can Use This Function

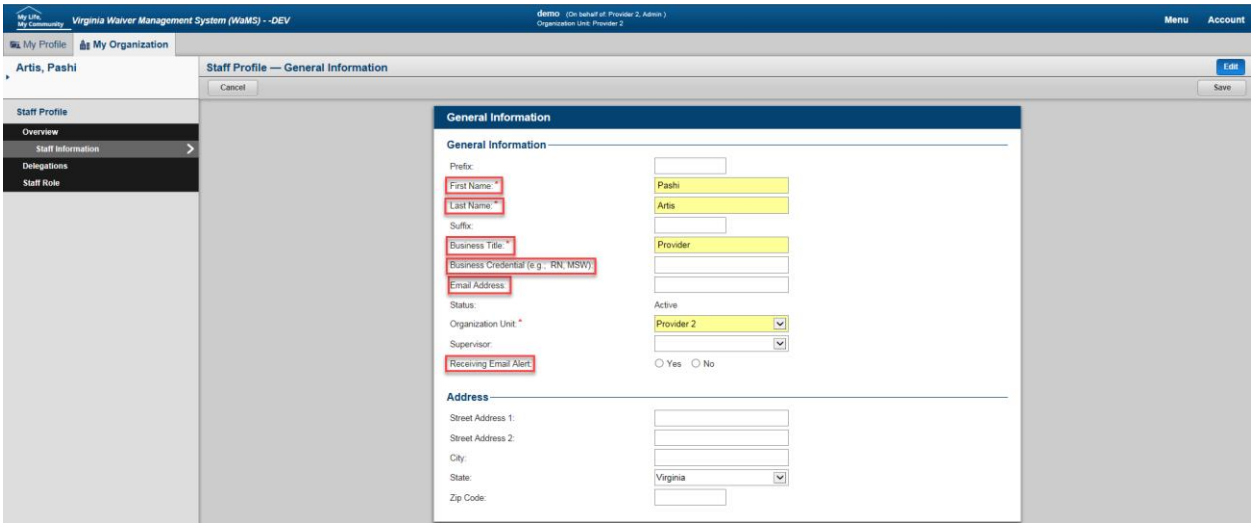
DBHDS, DMAS, CSB, Providers with Admin access

How to Use This Function

1. Navigate to the Staff Profile (See: Search Staff or My Staff)

8.5.1 Edit General Information:

2. Click Overview
3. Click Edit in the General Information section
4. Complete edits to Staff Name, Title, Credentials, Email or Email Alert settings
5. Click Save



8.5.2 Add/Edit Phone Numbers:

2. Click Add Phone or Edit Phone Numbers and complete required fields
   a. Phone Type

b. Phone Number

3. Click Save

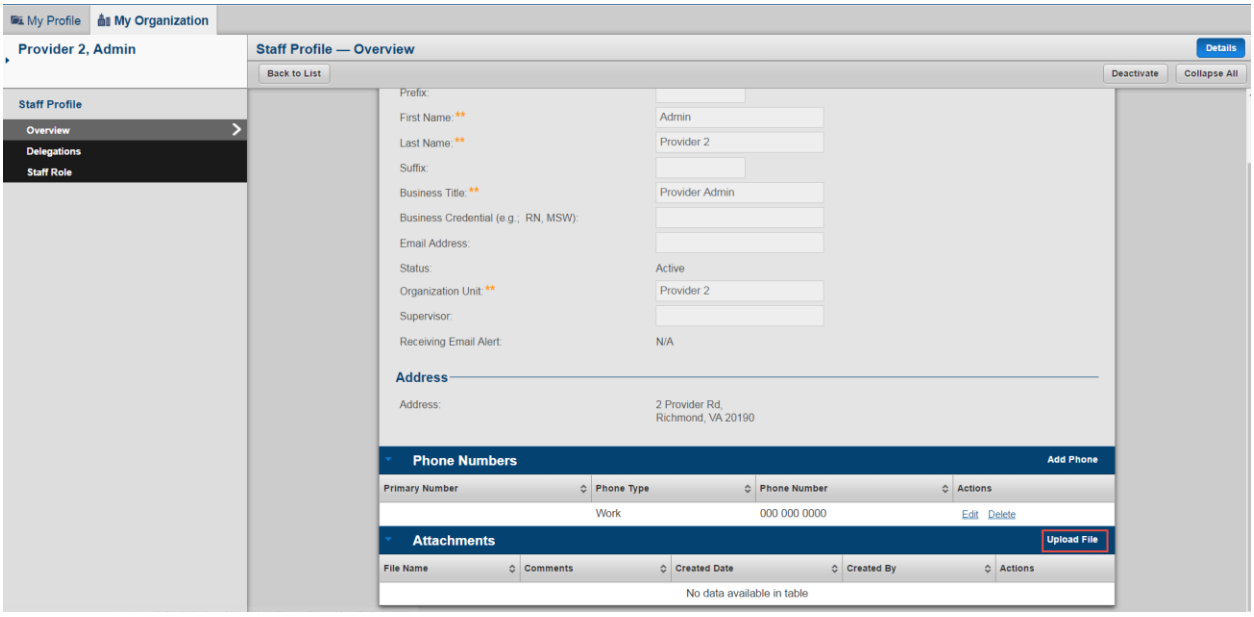
Tip:
- Add additional phone numbers by clicking Add Phone Number

8.5.3 Delete Existing Phone Number

2. Click Delete to delete existing phone number
3. Confirm deletion of record in pop-up or "Cancel" to cancel deletion

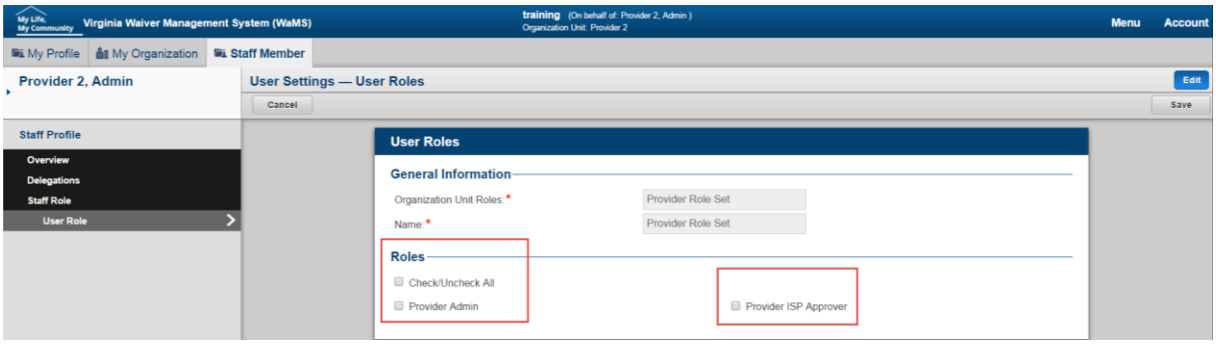
8.5.4 Add Attachments to Staff Profile

2. Click Upload File
3. Under File Name, Click Choose File
4. Enter any desired comments
5. Click Save



8.5.5 Edit User Roles

2. Click Staff Role then Edit within User Roles section
3. Select appropriate role(s) and click Save

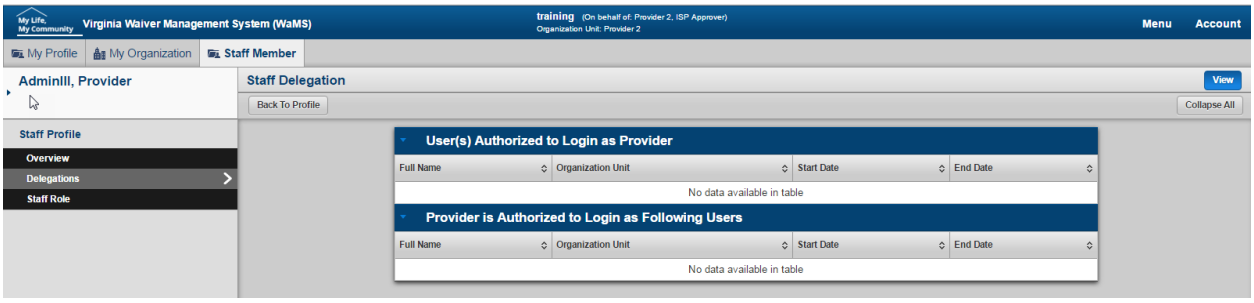


8.5.6 View Delegations

Tip:

- Providers have view only access to Delegations.
- Delegations can be used to manage the ability for users to authorize on behalf of other users. Users log on as the user they are completing the authorization for.
- On the End Date, the user will no longer be able to login as that user.

2. Click Delegations in the Staff Profile menu



9 Global Print

Purpose of This Function

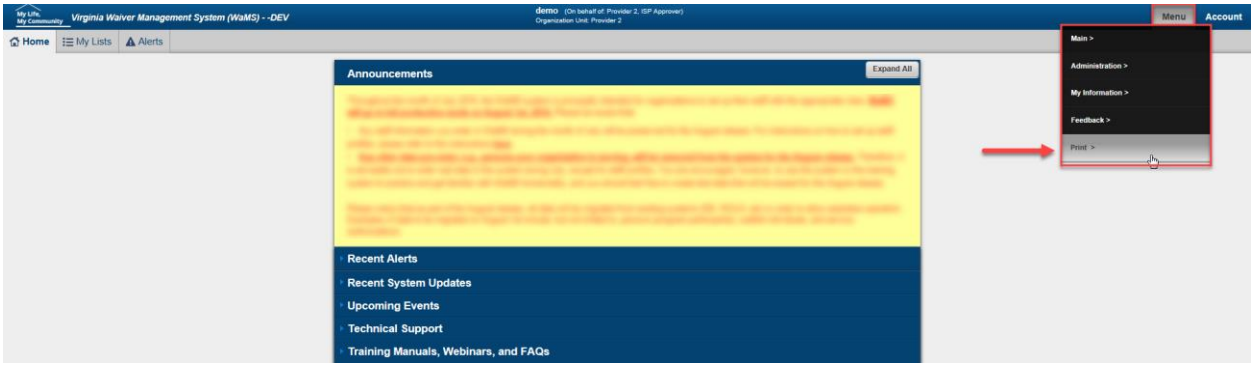
The Global Print allows user to create a PDF version of any page in WaMS for print or reference.

Who can Use This Function

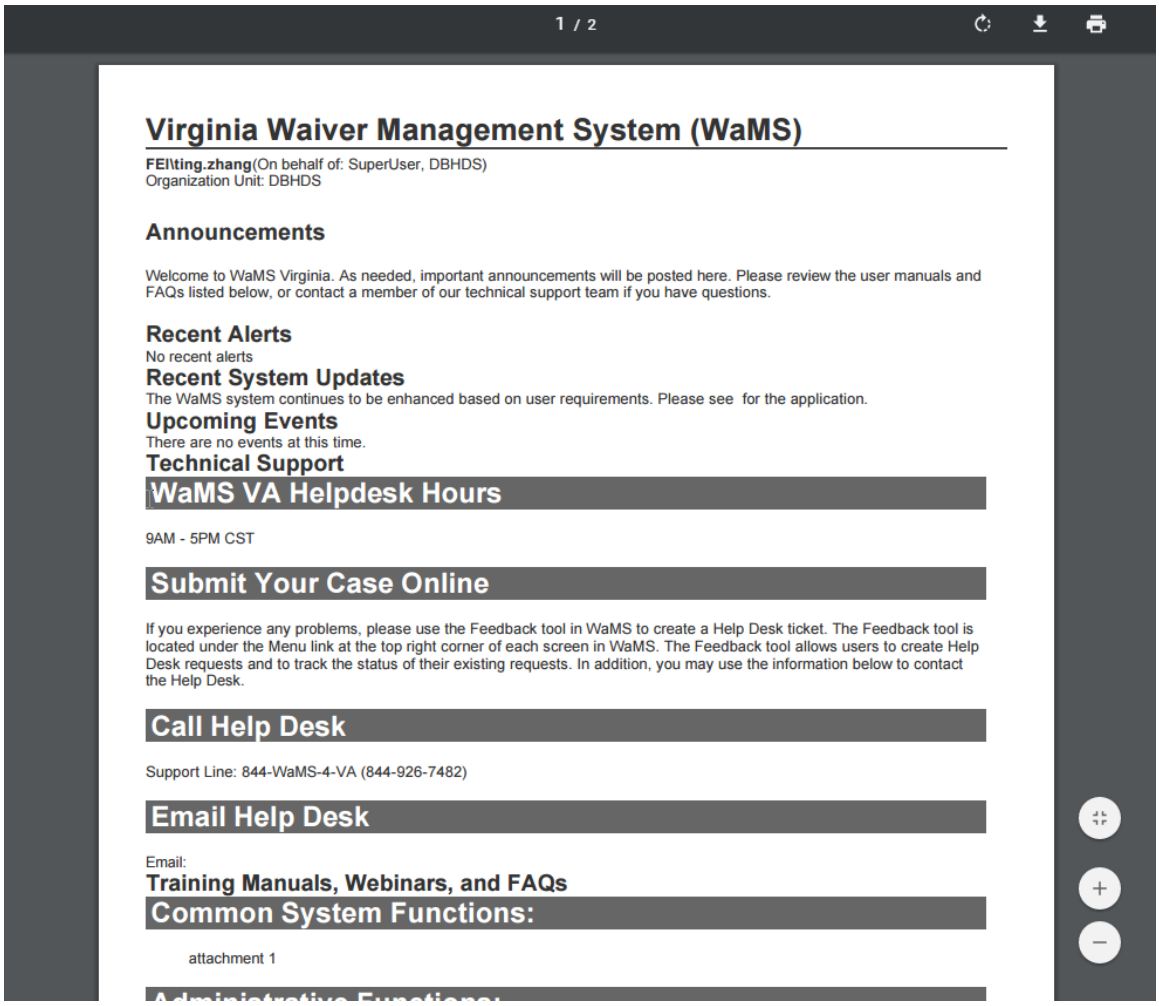
Any WaMS User

How to Use This Function

1. Navigate to Menu, select Print



2. Click "Print", system will generate a PDF version of current page



1 / 2

Virginia Waiver Management System (WaMS)

FEI\ting.zhang(On behalf of: SuperUser, DBHDS)
Organization Unit: DBHDS

Announcements

Welcome to WaMS Virginia. As needed, important announcements will be posted here. Please review the user manuals and FAQs listed below, or contact a member of our technical support team if you have questions.

Recent Alerts

No recent alerts

Recent System Updates

The WaMS system continues to be enhanced based on user requirements. Please see for the application.

Upcoming Events

There are no events at this time.

Technical Support

WaMS VA Helpdesk Hours

9AM - 5PM CST

Submit Your Case Online

If you experience any problems, please use the Feedback tool in WaMS to create a Help Desk ticket. The Feedback tool is located under the Menu link at the top right corner of each screen in WaMS. The Feedback tool allows users to create Help Desk requests and to track the status of their existing requests. In addition, you may use the information below to contact the Help Desk.

Call Help Desk

Support Line: 844-WaMS-4-VA (844-926-7482)

Email Help Desk

Email:

Training Manuals, Webinars, and FAQs

Common System Functions:

attachment 1

10 Person's Details –

10.1 Add an Attachment

Purpose of This Function

Person's Details, Person's Information, allows Providers to upload files to an individual's record

Who can Use This Function

All Providers

How to Use This Function

1. Access Person's Information
2. Click Attachments
3. Click Upload File
4. Click Choose File to locate the file to be added
5. Identify the Category using the drop-down menu
6. Click Continue

11 Case Management

Purpose of This Function

Case Management, Add Service Notes, allows Providers to view and add note to an individual's record

Who can Use This Function

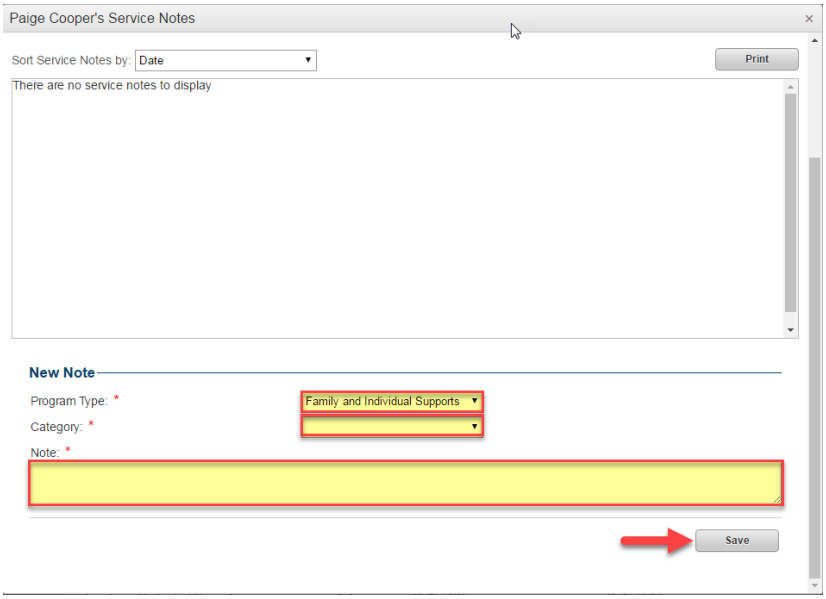
All Providers

How to Use This Function:

11.1 Add Service Notes

1. Access a Person's Details and click on Service Notes (Case Management → Service Notes)

2. Scroll to the New Note section



3. Identify the Waiver Type (this field will default to the current program type of the slot the person is assigned to):
    a. Community Living
    b. Family and Individual Supports
    c. Building Independence
4. Complete optional fields if known: Category and From Date.
    a. The To Date defaults to the current day but may be changed
5. Scroll to the bottom of the screen and validate the Waiver Type
6. Identify the Category
7. Add Notes in the required field
8. Add Notes in the required field

Tip:
- Notes should be brief but provide enough information for someone else to understand the full picture

9. Click Save

Tip:
- Additional Notes may be added as needed by following the above process

10. Close the Service Notes window once desired actions are completed

11.1.1 View Service Notes

11. Identify the Program Type (required field)
12. Add additional known optional information
    a. Category

   b. From Date
   c. To Date
13. Click Filter to receive the notes

Tip:
- CSBs have access to Person profiles, including Service Notes, in their specific OU
- DBHDS has access to Person profiles, including Service Notes, in all OU streams

14. Service Notes may be sorted by:
   a. Date (default)
   b. Entered By
   c. Organization Unit

11.1.2 Print Service Notes

15. Click Print to print available Notes

12 Screening and Assessment

12.1 Virginia Individual Developmental Disabilities Eligibility Survey (VIDES)

Purpose of This Function

The VIDES survey details the process for determining the eligibility and Level of Care for infants under age of 3, children aged from 3 to 18, and adults over the age of 18.

Who can Use This Function?

Any WaMS User

How to Use This Function

Providers are able to view VIDES results

12.1.1 VIDES Result (Details)

1. Access Screening and Assessment in the Person's Detail folder
2. Select VIDES
3. Click Summary
4. If the person has a submitted VIDES, then the summary results will display
5. Select View to see answers to specific VIDES questions

Tips:
- CSBs can create and edit the VIDES.
- Providers can only view the VIDES.

12.2 Support Intensity Scale (SIS)

Purpose of This Function

To view all past and present SIS uploaded into the WaMS system by DBHDS

Who Can Use This Function

DBHDS, DMAS, CSB, Provider

How to Use This Function

1. Access the Personal Summary Page
2. Click Screening and Assessment
3. Click SIS

Tip:
- The latest SIS result for the person will be displayed on multiple pages throughout the system
- Only the SIS page will display SIS results that are not current

13 Programs

13.1 Individual Support Plan

Purpose of This Function

To determine the services needed for an individual and the providers involved in providing these services

Who Can Use This Function

DBHDS, CSB
Provider (add notes, add attachments only)

How to Use This Function

1. Access the Individual Support Plan – List (Programs -> Individual Support Plan)

Tips:
- Default start date of an individual service defaults to plan start date
- Default end date is displayed as Plan start date plus one year
- ISP service will only display services with selected program type based on Program Type data from the Service Definition

13.1.1 Add Notes to an In-Progress ISP

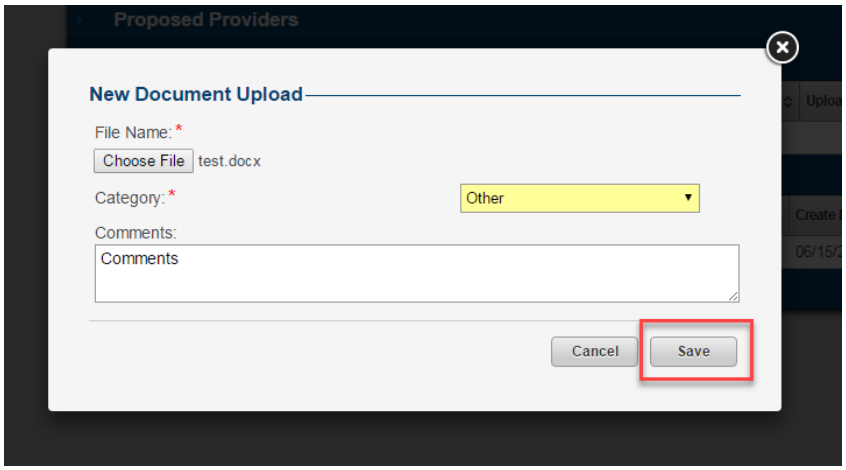
Tip:
- Providers cannot view notes added by other Providers. They may only see notes addressed to them.

1. Enter a note in the Note Content box
2. Select the recipient from the Send To dropdown and click Save

13.1.2 Add an Attachment to an in-progress ISP:

Tips:
- Providers cannot view attachments added by other Providers.
- Users cannot delete attachments from another user.

1. Navigate to Personal Summary
2. Under Programs, select Individual Support Plan -> Summary
3. Under Actions, click Summary
4. Click Upload Attachment
5. Select file to add and select Category from the Category dropdown
6. Click Save

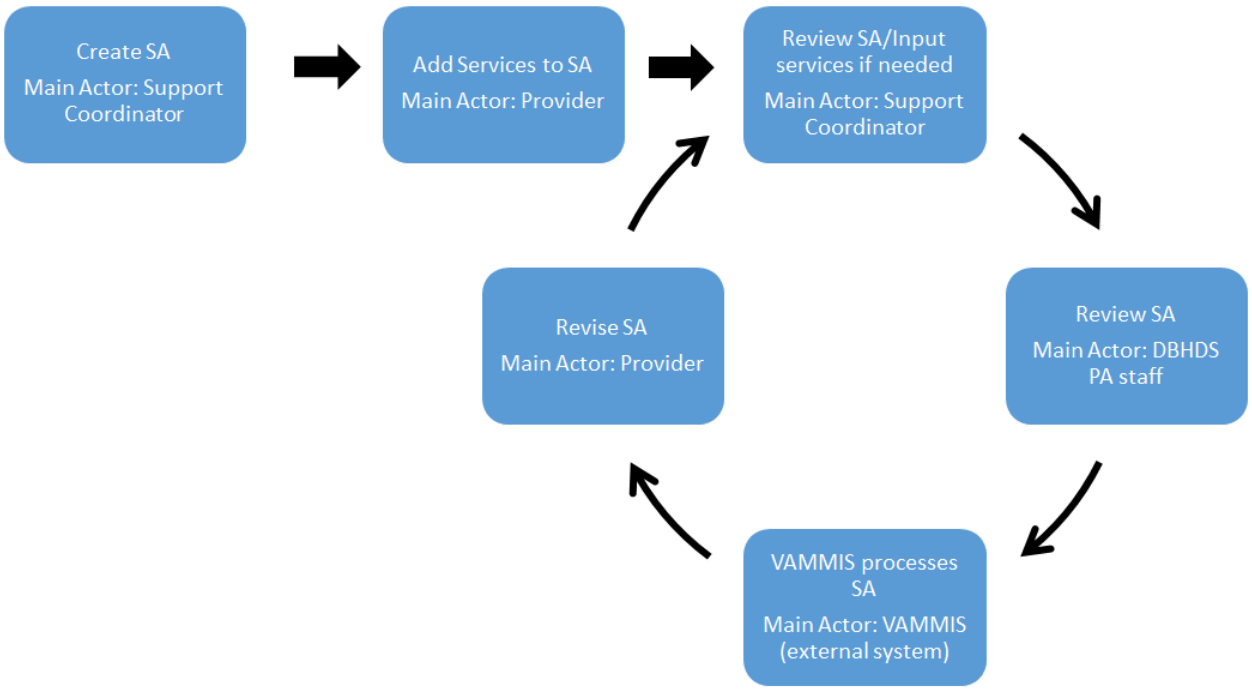


13.1.3 View an Attachment on a Completed ISP

1. Access the Individual Support Plan Summary (Programs -> Individual Support Plan -> Summary)
2. Click Attachments

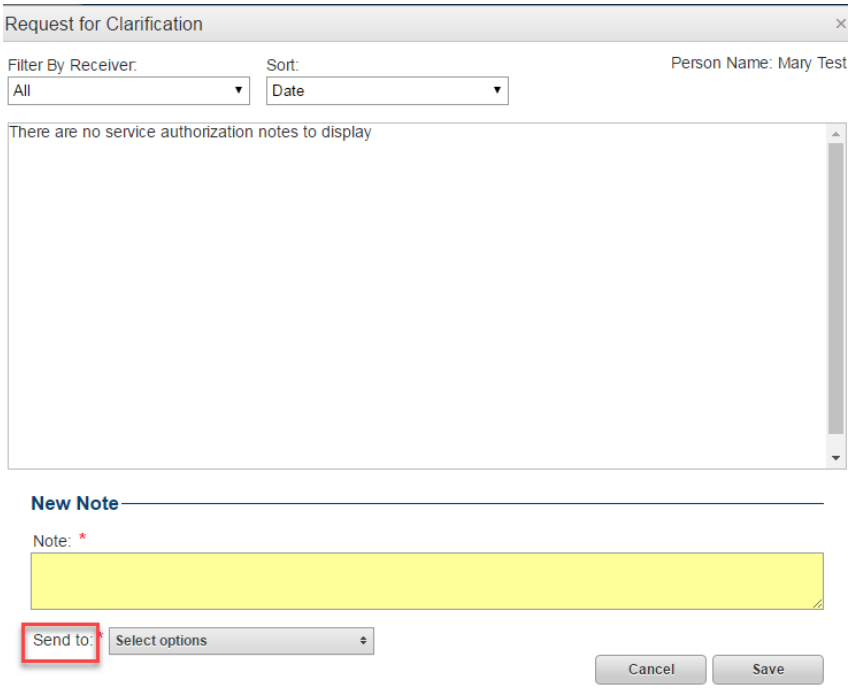
13.2 Service Authorization

The overall process for the Service Authorization (SA) is below.



Notes can be viewed/entered at any time by selecting the Note button from the Summary page

The "Send To" option will alert a member of the selected organization(s) that a note has been entered related to the Service Authorization



13.2.1 Add Services to a Service Authorization

Purpose of This Function

Add services to the Service Authorization

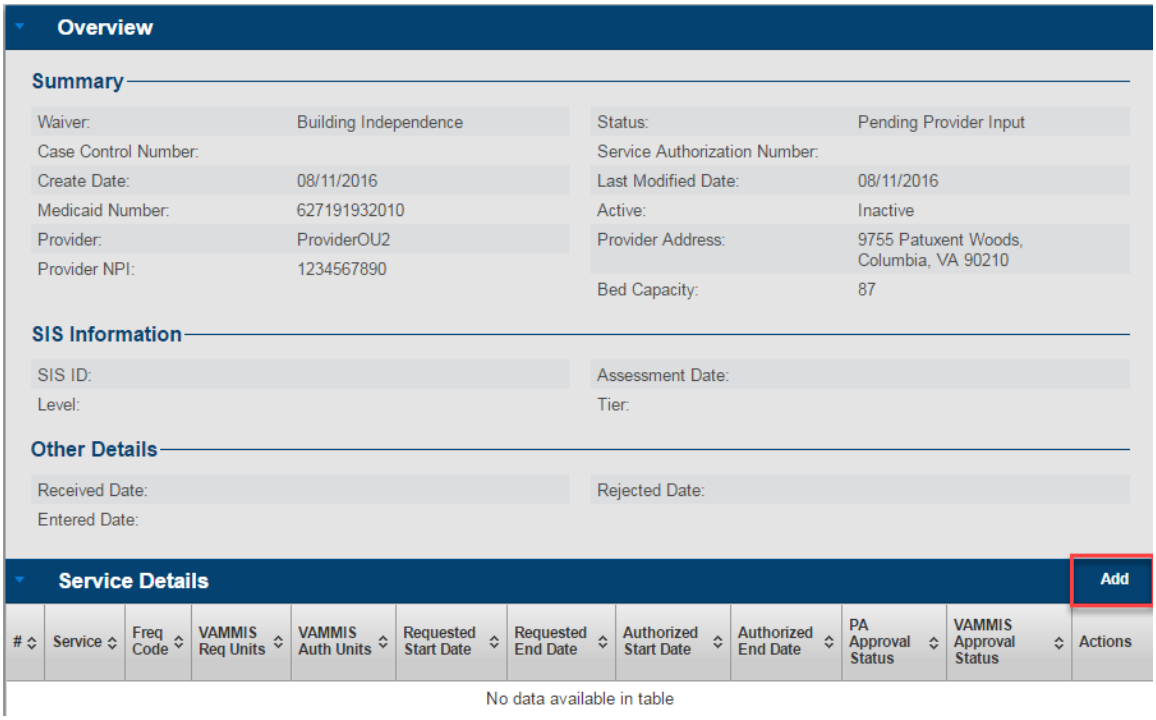
Who Can Use This Function

DBHDS, Provider

How to Use This Function

By this time, the Support Coordinator has created a Service Authorization for the provider. The provider will receive an alert that a new Service Authorization has been created.

1. Access the Service Authorization Summary page and next to Service Details click Add



2. Complete required fields in Service Detail Information section
   a. Service – select from drop-down
   b. Requested:
      i. Start date – may not be back dated unless the service has a post-authorization flag
      ii. End date – may not be back dated unless the service has a post-authorization flag

iii. Units – WaMS determines the Units and MMIS Units based on the Service selected . MMIS Units will populate based on the Units and the fudge factor of the service.

Service Information

Service: *
Procedure Code:
Procedure Type:
Modifier 1:
Modifier 2:
Modifier 3:
Modifier 4:
Frequency code:
Help message: N/A
Comments:

Requested & Authorized Information

Requested		Authorized	
Start Date: *		Start Date:	
End Date: *		End Date:	
Units: *		Units:	
MMIS Units:		MMIS Units:	
Amount:		Amount:	
Cost/Unit:		Cost/Unit:	

Tip:

- Certain services will require other fields to be filled out, and certain services will have limits. WaMS will prompt the user with help messages if these apply.

3. Click Save to go back to the view details of the new addition
4. Additional actions that may be completed:
    a. Add – add another Service
    b. By Service
        i. View
        ii. Edit
        iii. Delete
5. Click Submit to Support Coordinator once all needed actions have been completed
6.

Tip:
- A Service Authorization can only have 18 service lines. After 18 lines, the system will automatically create a new Service Authorization

7. Service Authorization – Summary title bar reflects Status: Pending Support Coordinator Review

13.2.2 Revise a Service Authorization with an Service Authorization

Purpose of This Function

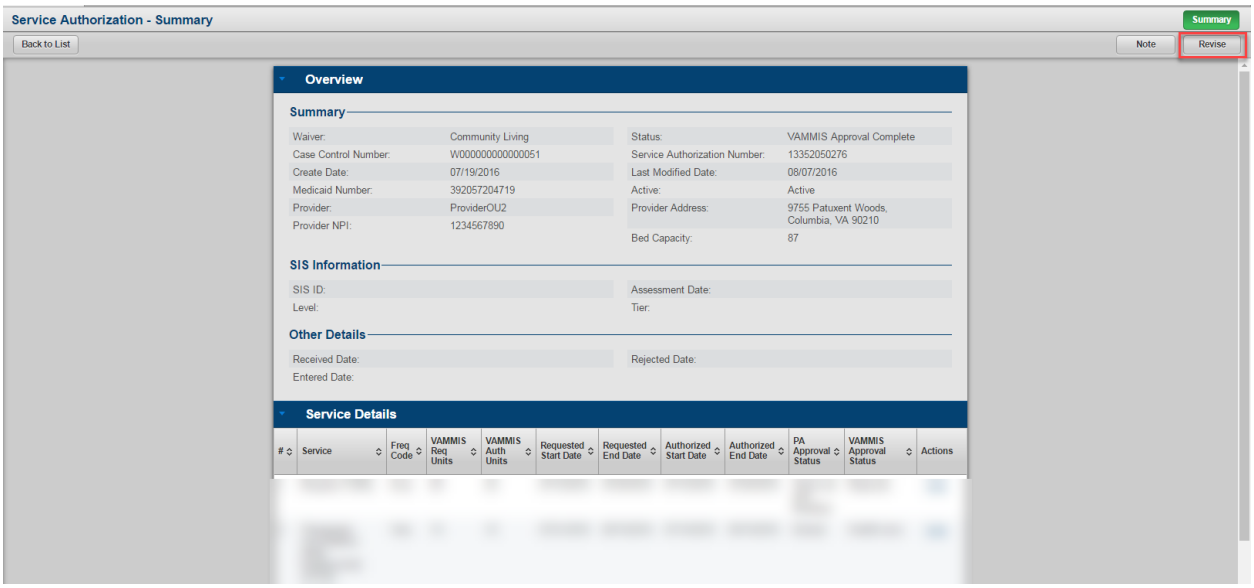
Revise a Service Authorization after it has been processed by VAMMIS

Who Can Use This Function

DBHDS, Provider

How to Use This Function

Note: Prior to this the following has occurred:
- The Support Coordinator and PA staff have reviewed the SA
- VAMMIS has processed the SA
  1. Access the individual's Service Authorization – List Page
  2. Click Revise button in the upper right of the screen- the SA goes back to Pending Provider Input and the user can make edits from there



3. Make the necessary edits/revisions completing all fields
   a. If VAMMIS processed the Service Line Item, then the options available will be to View, Revise, and End (if applicable); revising one of these will create a new service line item. If VAMMIS was not able to process the Service Line Item(i.e. service was put on hold or VAMMIS was not able to process the Service Line item), then the options available will be View, Edit, and Delete; acting on these will not create a new service line item
   b. If selecting to end a service, the only available editable field will be the End Date

Tips:
- Services that have passed the authorized End Date cannot be revised or ended unless they have a post authorization flag
- If ending a service, then the end date cannot be before the authorized start date or after the authorized end date

4. Click Submit to Support Coordinator
5. Begin workflow for SA again (See the graphic)

14 My Lists

14.1 Enrollment

Purpose of This Function

Easily view individuals in a specified waiver, status and CSB assignment

Who Can Use This Function

DBHDS, CSB

Providers (view only)

How to Use This Function

1. Access the Enrollment List Page (My Lists tab -> Enrollment)
2. Complete required search fields:
    a. Show Me – My people with enrollment or (all) People with Enrollment
    b. Waiver – identify the waiver
    c. Status – identify the status
    d. CSB – identify the CSB
3. Click Filter
4. Click View to access the Person's Information Personal Summary window

14.2 Recertification

Purpose of This Function

Easily view individuals in Recertification

Who Can Use This Function

DBHDS, CSB, Provider

How to Use This Function

1. Access the Enrollment List Page (My Lists tab -> Individual Support Plan)
3. Complete required fields:
    a. Show Me – My people
    b. Annual ISP Status – Annual ISP due in X days or Annual ISP Overdue

i. A required Due in Days field pops up if Annual ISP due in X days is selected

4. Identify the type of Waiver to limit search results
5. Click View to access the Person's Information Personal Summary window and scroll to Enrollment Information for specific Redetermination information

14.3 Service Authorization

Purpose of This Function

Easily view service authorization

Who Can Use This Function

DBHDS, CSB, Provider

How to Use This Function

1. Access the Service Authorization List (My Lists tab -> Service Authorization)
2. Complete required fields:
   a. Show Me – My Service Authorizations Without Errors or My Service Authorizations with Errors
   b. Status – Progress results
   c. Date Range – From and To Date
   d. Service- Types of Services
3. Click View to access the Person's Information Personal Summary window and scroll to the Enrollment Information for specific Redetermination information