Authorizations

Authorizations require 2 case notes. The first note is completed prior to the service and the second note is done after the service is provided/purchased.

1. The Prior to Services note can be done as either an authorization type or a service verified type.
   a. The authorization type case note would be used if you did not talk to the client (i.e., you are seeing a client next week and need to authorize for a sign language interpreter).
   b. The service verified note type would be used when documenting services, you provided to the client and also writing an authorization for a future service (i.e., you provided guidance and counseling, or skills training and you are authorizing for a sign language interpreter for your next meeting).
2. The After Services note is a service verified note type. This note is written after receiving documentation/report/invoice.

Case Note before Service/Equipment is Purchased:

The below are steps for a service verified note type. If using authorization note type, some of the fields will not be available (i.e., service categories)

- Once you are in the client's program, go to program note
  - +New
  - Note type – services verified or authorization
  - Note date: date note being entered
  - Services - Check services you provided – (i.e. VR counseling and guidance)
    - **do not choose service provided by vendor**
  - Service date: date service is being provided
  - Service provided by drop down box
    - Service was provided in whole or part of agency staff
  - Communication type
  - Subject – Authorization
  - Description – enter in all required information

Authorization:

Pre-Plan

VR counselors use pre-plan authorizations for services allowed to complete an application and determine eligibility (interpreter, transportation, assessment, etc).

- Go to client program
- Click on tab - authorization (if the screen is too large, it may be under MORE)
- +New authorization
    - Authorization screen opens
    - Complete the required fields
        - Program Type – Drop down box
            - Choose Vocational Rehabilitation
        - Search Service Category
        - Choose service being authorized
        - Click done
        - Search for provider by typing in at least 2 characters
        - Hit enter and choose the provider from the list
        - Provider address - Drop down box
        - Authorized start and end date
        - Authorized amount
        - Federal Fiscal Year
            - 2024
        - Budget Type – Drop down box
            - 110 VR Case Services
            - 6B Supported Employment
        - Budget – Drop down box
            - Potentially Eligible: - BDG-PE 2023-00007 (10/01/2023-09/30/2024)
            - VR Funds - BDG-VR 2023-00001 (10/01/2023-09/30/2024)
            - Pre-Ets Funds - BDG-VR 2023-00008 (10/01/2023-09/30/2024)

            - Do not use currently - BDG-VR 2024 (10/01/2023-09/30/2024)
        - Service Notes – do not use
        - Description – specific information about the authorization. Examples include:
            - Number of hours of job coaching and rate
            - Name of books authorizing
            - Type of assessment
            - If a support service – identify service category it supports. (i.e., transportation to support college training, transportation to support pre-ets work-place readiness training, maintenance to support disability related skills training, other services/language interpreter to support disability related skills training)
        - Click Save
        - The page will refresh and additional fields appear
            - Workflow Actions
                - Send for review/approval
                - Authorization canceled
            - Once send for review/approval is selected, another field appears – Drop down box of supervisor names
            - Select supervisor
            - Leave authorization sent field blank
            - Navigate to the bottom and click save
            - Enter password

In Plan

Once the plan is developed, this is the only way to complete an authorization. The services available to authorize are tied to the services on the plan.

- In the client's program, go to tab – plan
    - Navigate to the bottom of the page
    - Click button named Create New Authorization
    - Authorization screen opens
    - Complete the required fields

    - **(same process as described in pre-plan – page 2-3)**

Client Reimbursement Authorization – same process as above except:

- Provider: Client Reimbursement

Case Note after Authorized Service is Provided:

- Once the report/invoice is received, a program note must be completed. (this may be in the form of an "ok to pay" request from accounting)
  - Note Type: Services Verified
  - Note Date: Date note is being entered
  - Search Service Category: Choose service **provided by the vendor** (i.e. college, rehab technology, etc)
  - Service Date: Date service was provided (i.e., specific meeting) or date of report if invoice covers a period of time (i.e. college training invoice received in middle of semester)
  - Service Provided by: Service was provided in whole in part through purchase by the agency
  - Provider: Type in at least 2 characters of the provider's name and a list of providers will populate for you to choose from
  - Subject: Service provided by
  - Description: Describe how the service provided was verified - examples:
    - Report was provided for job coaching provided by Goodwill from 04/02/2024-04/30/24.
    - Invoice was received from Interpreter Services Agency for a meeting.

Once Approved

External Authorizations

- Once approved, support staff sends the authorization to the provider (vendor).
- Support staff enters date sent in authorization screen.

Internal Authorizations

- Once approved, support staff prints authorization as a PDF and emails to the accounting email.

- Accounting pulls the requested item and notifies the counselor that it is ready for pick up.
- Counselor coordinates how to retrieve the items for the client.

Workflow Terminology:

  - Draft - Draft Authorization Created
  - Draft Pending Review/Approval - Submitted for Review/Approval
  - Issued - Draft Authorization Approved
  - Canceled-Authorization Canceled
  - Closed-Authorization Closed (paid) – only accounting staff use this option after service/equipment is paid.