

PC 1000 SUD TREATMENT TRACK

SANWITS FLOW FOR TREATMENT PC 1000 CLIENTS

Below are the steps for entering PC 1000 clients who have been assessed and are going to be admitted into a SUD treatment program. There are specific indicators in SanWITS for tracking and reporting purposes. Some of these field values have changed as of July 1, 2018 with the onset of ODS. CalOMS reporting is required for all clients receiving SUD treatment services regardless of the individual client's funding source.

Required SanWITS records: Client Profile, Contact, Intake Screen, Admission, Diagnosis, Program Enrollment, Payor Group Enrollment, Annual Update (if applicable), Encounters, and Discharge

Getting Started:

1. Create Client Profile –

- If the client profile already exists in SanWITS, please review for accuracy before proceeding
- If the client does not exist, select Add Client and complete

2. Create Contact Screen

- Select Contacts from the Navigation Pane and complete
 - ❖ For “Source of Referral” – select “12-Court/Criminal Justice Referral” (this entry will populate the Intake screen)
 - ❖ Contact Made By – should be the person making first contact with the Provider
- Select Save
- Important: Review for Accuracy before next step - Complete Review. Once the Complete Review has been clicked, the screen will become read only and cannot be edited.*
- Select Complete Review – under Administrative Actions at the bottom left of screen

The screenshot shows the SanWITS interface for creating a contact profile. On the left is a navigation pane with 'Contacts' highlighted. The main form area is titled 'Contact Profile' and contains the following fields:

- Client Information:** Client Name: Participant, PC1000; Age: 33; DOB: 2/5/1985; Gender: Female; Unique Client Number: PP02020585; MPI; SSN: 9902.
- Contact Details:** Initial Contact Date: 1/1/2019; Stop Date: 1/1/2019; Start Time: 8:05 AM; Stop Time: 8:26 AM; Duration: 21; Contact Method: Phone; Source of Referral: 12-Court/Criminal Justice Referral; Requestor Name; Requestor Phone #.
- Administrative Fields:** Status: Completed; Created Date: 1/3/2019 9:19 AM; Contact Made By; LMHA; Benefit Type; Presenting Needs; Disposition: Mac; Signed Notes.
- Administrative Actions:** Complete Review, Move Contact, Delete.

Red arrows in the image point to the 'Contacts' menu item, the 'Source of Referral' dropdown menu, the 'Contact Made By' dropdown menu, the 'Complete Review' button, and the 'Save' button.

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- Select Create Intake – under Administrative Actions

Contact Profile

Client Name: Participant_PC1000	Unique Client Number: PP02020585
Age: 33	MPI:
DOB: 2/5/1985	SSN: 9902
Gender: Female	

Status: Completed

Created Date: 1/3/2019 9:19 AM

Initial Contact Date: 1/1/2019 **Stop Date:** 1/1/2019

Start Time: 8:05 AM **Stop Time:** 8:26 AM **Duration:** 21

Contact Method: Phone

Contact Reason: Routine Service **Source of Referral:** 12-Court/Criminal Justice Referral

If Other, Specify:

Call Taker: [REDACTED] **Requestor Name:**

Location:

Requestor Phone #:

Contact Made By: Justice System **1st Offered Intake/Screening Appt:** 1/2/2019

LMHA:

Benefit Type: NA **1st Accepted Intake/Screening Appt:** 1/2/2019

Presenting Needs:

Disposition: Made an appointment

Unsigned Notes:

Signed Notes:

Reviewed By: Emerson, Cynthia **Review Completed:** 1/3/2019

Administrative Actions:

- [Create Intake](#)
- [Move Contact](#)
- [Delete](#)

3. Complete the Intake Screen

- Source of Referral – will be read only
- Risk Categories – Select “Criminal Justice” and all that apply
- Save and Finish

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Intake Case Information

Intake Facility	Main Facility	Case #	1
Intake Staff		Case Status	Open Active
Manner of Contact	Phone	Initial Contact Date	1/1/2019
Residence	San Diego	Intake Date	1/2/2019
Source of Referral	12-Court/Criminal Justice Referral	Pregnant	0-No
Referral Contact		Chronic Life Threatening Illness (CLTI)	No
	Add Collateral Contact	Injection Drug User	No
Referral Date		Presenting Problem (In Client's Own Words)	
Assessment Date			
1st Offered Tx Appt	1/2/2019		
1st Accepted Tx Appt	1/2/2019		

Risk Categories	Selected Risk Categories
None	Criminal Justice
All Other Injection Drug User	
Cognitive Impaired	
Foster youth	

Date Closed		Save & Close the Case
Closure Reason		

Cancel Save Finish

4. Create Admission Record

- Select Admission from the Navigation Pane and complete
- On the Admission Profile screen
 - ❖ Type of Treatment Service – select what is appropriate value for treatment
 - ❖ Submit to CalOMS - select "YES"

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Admission Profile

Gender: Female

Age: 33

Screening

Basis for Decision

Potential Client for MH

Potential Client for TBI

Admission Date: 1/2/2019

Admission/Transaction Type: 1-Initial Admission

Type of Treatment Service: 1-Nonresidential/Outpatient Treatment/Rec...

Submit to CalOMS: Yes

of Days Waited to Enter Tx:

of Prior Episodes:

Codependent/Collateral: No

CalWORKs Recipient:

SA Tx Under CalWORKs:

Special Services Contract ID: NA

Special Services/Contract County Code: Not Applicable

Record Status

Record Created By:

Last Updated By:

CalOMS Form Serial #:

CADDs Form Serial #:

Created Date:

Last Updated Date:

Last Upload to State Date:

[Mark as Deleted](#)

Cancel Save Finish

- On the Admission Administration Screen
 - ❖ Special Population Program - select "PC 1000 Participant"
 - ❖ How did you hear about us? – select "5-Any Crim Justice i.e. Probation/Court/Parole/Law Enforcement"

Admission Administration

Program Fees:

Drug Testing Participation:

Baseline UA Completed:

Pictures Taken:

Intake Fees:

Testing Level Indicator:

Drug Screening Fees:

Encounter Fees:

Start Date:

End Date:

Prop. 36:

JURIS #:

Special Population Program: PC 1000 Participant

How did you hear about us?: 5-Any Crim Justice i.e. Probation/Court/Paro...

If Other, Specify:

Administrative Checklist

Personal Rights Given

Emergency Contact release signed

Property inventory done

Have the rules been read and signed

Medical assessment form

Selected Items

Cancel Save Finish

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- On the Legal/Criminal Justice screen
 - ❖ Criminal Justice Status – select “5 Admitted under other diversion from any court under CA Penal Code, Section 1000”

Legal/Criminal Justice

of Arrests in Last 30 Days

of Jail Days in Last 30

of Prison Days in Last 30

of Arrests in Last 6 Months

Criminal Justice Status

Type of Sentence

CDC Number

Parolee Services Network (PSN)

FOTP Parolee

FOTP Priority Status

5. Create Diagnosis via Admission

- Select Edit Diagnosis - Diagnosis must be a SUD Diagnosis and one must be designated as principal diagnosis
- Type – Behavioral
- Diagnosis – must be a SUD related
- Principle Diagnosis - Yes

6. Create Program Enrollment -

- Select Program Enrollment from the Navigation Pane
 - ❖ Select Add Enrollment
 - ❖ Select the program enrollment from the drop-down menu under Program Name (Do not use PC1000 Education Only)
 - ❖ Start date should match the Admission date
 - ❖ Perinatal – this is connected to Perinatal rates on the claim. Select No if the provider is not able to bill DMC for Perinatal services

Program Enrollment Profile

Facility

Program Name

Program Staff

Perinatal

PS Court Phase

Start Date

End Date

Termination Reason

Notes

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7. Create Payor Group Enrollment – if billing DMC

- Select Add Benefit Plan from Navigation Pane and complete
 - ❖ Payor-Type – Medicaid
 - ❖ Plan Group – Should be either “ODS DMC Non-Peri” **OR** “ODS DMC Peri”

Payor List				
Actions	Priority	Plan	Group	Subscriber/ Acct#

Benefit Plan/Private Pay Billing Information

Payor-Type Medicaid

Payor Priority Order 1

Coverage Start End

Aid Code Relationship to Subscriber/ Responsible Party

Plan-Group

Policy #

Subscriber/ Responsible Party:

First Name Middle Last Name

Birthdate Gender Subscriber

Address 1

Address 2

City State Zip

Plan-Group dropdown menu:

- *June 2018 i - Cal - ADP - Perinatal-Mr - Cal - Perinatal ✗
- *June 2018 i - Cal - ADP - Non Perinatal - Medi-Cal - Non Perinatal ✗
- ODS DMC- Non Peri-Medi-Cal - Non Perinatal
- ODS DMC- Peri-Medi-Cal - Perinatal

8. Create Encounters-

- Select Encounter from the Navigation Pane and Complete for each service as applicable

9. Create Annual Update - if applicable

- Select Annual Update from the Navigation Pane and Complete- refer to timeline requirements

10. Create Discharge -

- Select Discharge from the Navigation Pane and Complete

Please note: Program enrollment must be end dated for a user to discharge a client. The end date should be the same as the discharge date.