SanWITS Flow

"Drug Court Programs Workflow"

- Client will need to be assessed. If client is assessed for Outpatient Services, you'll open a new episode like any other client.
    - If a client is assessed for Residential Services, you'll need to open an episode at your facility for tracking purposes by following the instructions below.

1. Complete a Client Profile (if one exists in the agency, review for accuracy and edit as necessary)
2. Open a new episode/intake by Completing a Contact Profile
    - Review for accuracy, click on Complete Review and then click Create Intake
3. Complete the Intake screen
    - 1st, 2nd, and 3rd Available TX Appt date and the 1st Accepted TX Appt = Leave Blank
    - The Intake will show "In Progress" status on the Activity List.
    - Save and Finish
4. **NO PAYOR GROUP ENROLLMENT SHOULD BE ADDED**
5. **NO ADMISSION OR DISCHARGE RECORD SHOULD BE ADDED**
6. **NO DIAGNOSIS SHOULD BE ADDED**
7. **NO PROGRAM ENROLLMENT SHOULD BE ADDED**
8. **NO ENCOUNTERS SHOULD BE CREATED**
9. Once the client completes the Residential Treatment and attends your facility to receive Outpatient Services.
    - Close the episode/intake, go back to the Intake screen
    - Enter the Date Closed (The date the client gets admitted to your program)
    - Enter Closure Reason (Client left/or Referred Out)
    - Click hyperlink for Save and Close Case
    - Click Finish
10. After previous episode is closed, you'll need to open a new episode by creating: **Contact, Intake, Payor Group Enrollment, Admission, Diagnosis, Program Enrollment, Encounters.**