SmartCare Stand Alone Services Workflow – Substance Use Disorder

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Workflow Outline with Screening (SAS OS only)

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2. Open an Inquiry
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4. Complete the Inquiry
5. Create the client if they were not already in the system
6. Open a Requested Enrollment to the SAS program
7. Collect client information necessary for billing
8. Complete Screening over the phone
9. Enter corresponding service
10. Screening determines client is not appropriate for the LOC and will not be scheduled for an appointment:
    a. Update Enrollment to Discharge
11. Client is given an appointment to be fully assessed and admitted:
    a. Update Enrollment to Enrolled

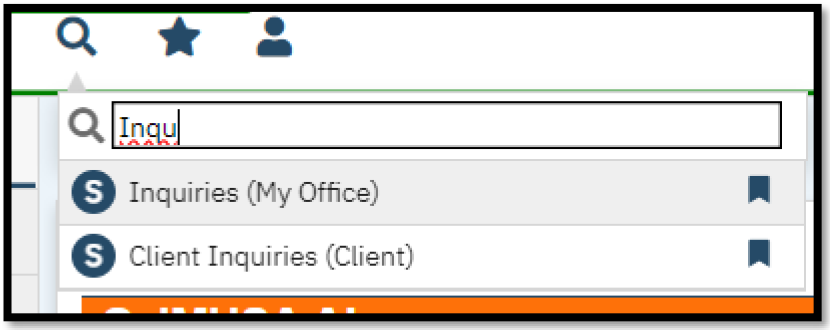
Workflow Outline with no Screening

1. Open an Inquiry
2. Search for the client to see if they are already in the system
3. Complete the Inquiry
4. Create the client if they were not already in the system
5. Complete ASAM on paper to determine admission eligibility and level of care
6. Assessment determines client is not appropriate for the level of care and will not be admitted:
    a. Open a Requested Enrollment to the SAS program
    b. Collect client information necessary for billing
    c. Enter corresponding service
    d. Update Enrollment to Discharge
7. Assessment indicates admission is needed:
    a. Admit client to appropriate level of care determined by ASAM
    b. Collect client information necessary for billing
    c. Enter corresponding services
    d. Carry on with treatment

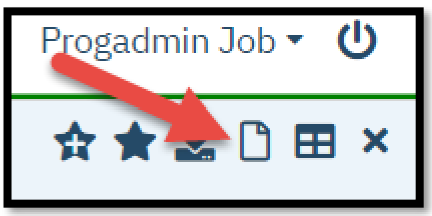
Client Search/Inquiry/New Client

The Inquiry is a screen which allows the user to document a request for services.

1. Search for and select "Inquiries (My Office)"



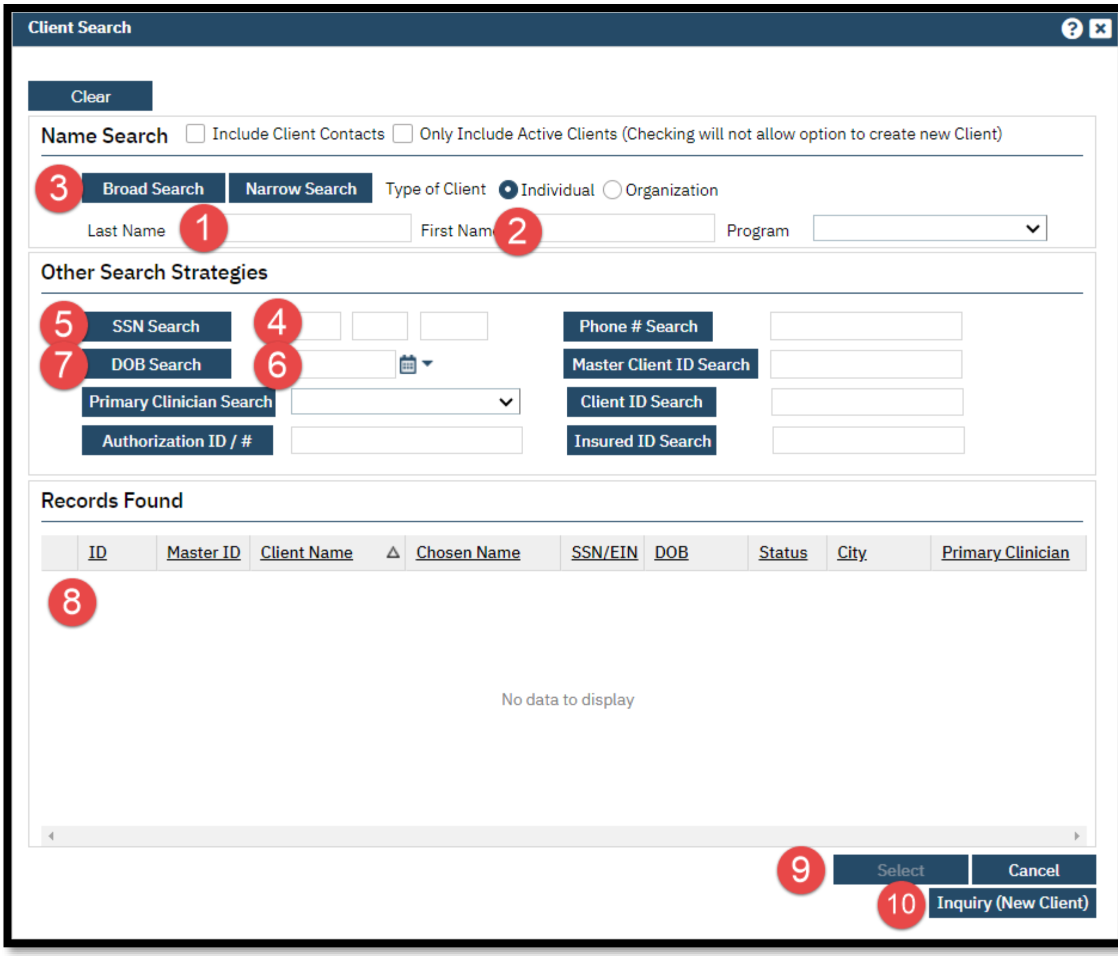
2. Click the New Icon



Client Search

If you have not already selected a client, the Client Search screen will open next.

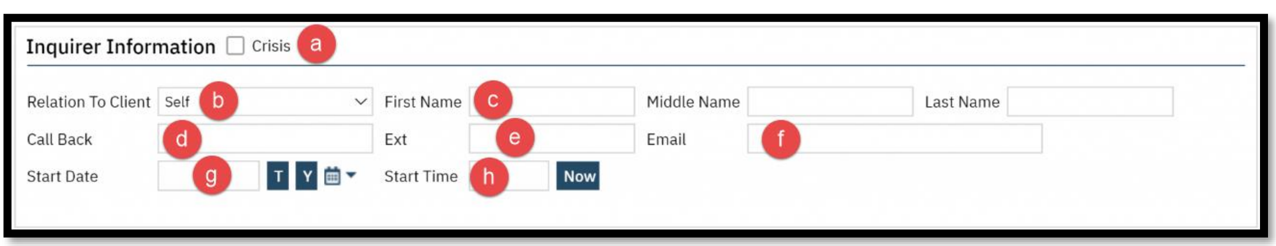
1. Enter a Last Name
2. Enter a First Name
3. Click Broad Search
4. Enter Social Security Number
5. Click SSN Search
6. Enter Date of Birth
7. Click DOB Search



8. Clients matching your search criteria will appear in the Records Found section
9. If a record matching the client appears, click Select
10. If no matching records are found, click Inquiry (New Client)

Complete Inquiry

Initial Tab



1. **Field Definitions: Inquirer Information**

    a. **Crisis Checkbox**: Select this checkbox to display the Crisis tab. Do not use this at this time. This has not been setup completely.

b. **Relation to Client:** Indicates whether the potential client contacted your organization or if someone did so on the client's behalf. If the client made the contact, the information from the client search will also pull into the Client Information (Potential) section discussed below. Select the relationship between the potential client and the inquirer.

c. **First Name, Middle Name, Last Name:** Enter the first, middle, and last name of the inquirer. If Self is selected in the Relation To Client field, this information populates from the Client Search window.

d. **Call Back:** Enter the phone number to call the inquirer back should the call be ended prior to gathering all information. If Relation to Client = Self, this information will also pull into the Home Phone field in the Client Information (Potential) section of the Initial tab

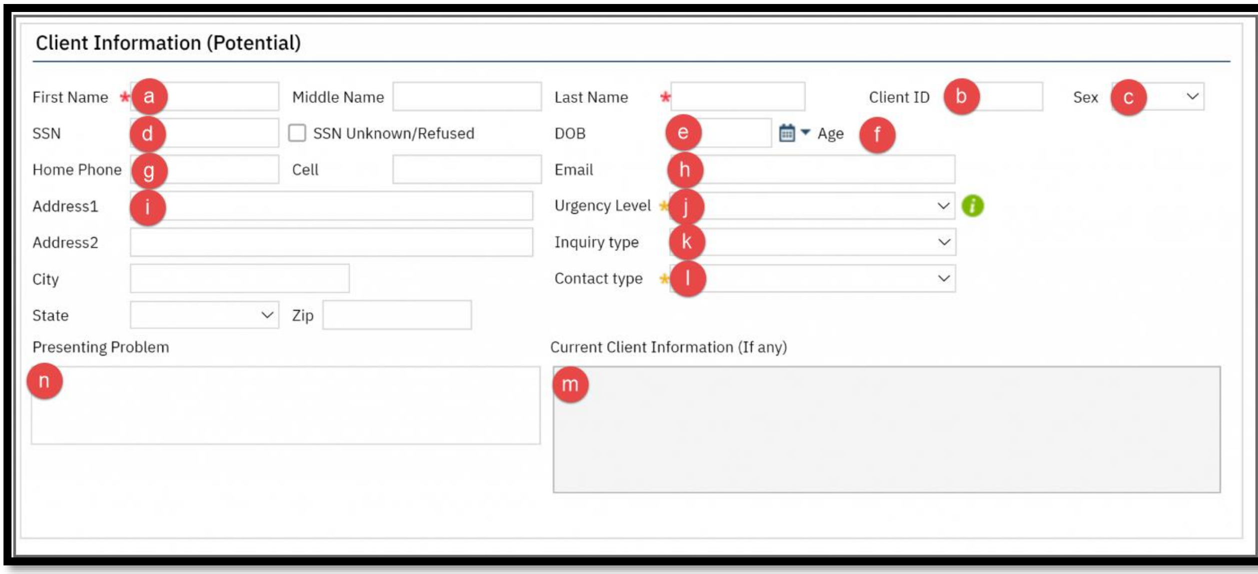
e. **Ext:** Pairs with the Call Back field to document an extension, if applicable

f. **Email:** Enter an email address for the inquirer. If Relation to Client = Self, this information will also pull into the Email field in the Client Information (Potential) section of the Initial tab.

g. **Start Date:** Enter the date that the Inquiry occurred.

    - This field also has paired buttons, T and Y, for today and yesterday, respectively. Click the T button to set the date to today. Click the Y button to set the date to yesterday.
    - Enter the date in the mm/dd/yyyy format or click the calendar icon to select the date.
    - Click the double caret (<< or >>) to navigate backward or forward by one year. Click the single caret (< or >) to navigate backward or forward by one month.
    - For pre-set dates, click the applicable hyperlink in the Streamline Date/Time Language section at the bottom of the pop-up calendar. Click <<More>> to display a menu of shortcuts.

h. **Start Time:** Time that the Inquiry began. Next to the Start Time field is a Now button. Clicking this button sets the Start Time to the current time. You can also manually enter the start time and include AM or PM. If you do not enter a time, the system defaults to 12:00 AM.



2. **Field Definitions: Client Information (Potential)**

   a. **First Name, Middle Name, Last Name**: If information exists in the client record for these fields, the data initializes and is not editable. If there is no information in the client's record to initialize and the field was not created via the client search, data can be entered into the field.

   b. **Client ID:** If the client is pre-existing, an ID displays here as a hyperlink that can be used to navigate to the client record. If there is no pre-existing information, this field remains empty until the potential client becomes a client.

   c. **Sex:** If information exists in the client record for this field, the data initializes. If there is no information in the client's record to initialize, a value can be selected from the dropdown. This pertains to the legal gender for billing insurance.

   d. **SSN:** Select this checkbox to indicate a lack of documentable SSN for the client. If applicable, selecting this checkbox fulfills the requirement for a SSN. If the SSN Unknown/Refused checkbox is selected, the field remains empty until the Inquiry is saved and then the field is populated with the value 999-99-9999.

   e. **DOB:** If information exists in the client record for this field, the data initializes. If there is no information in the client's record to initialize, a value can be entered.

f. **Age:** This field is populated after the DOB field is populated.

g. **Home Phone, Cell:** If information exists in the client record for these fields, the data initializes. If there is no information in the client's record to initialize, a value can be entered.

h. **Email:** Enter an email address for the client.

i. **Address, City, State, Zip:** If information exists in the client record for these fields, the data initializes. If there is no information in the client's record to initialize, a value can be entered.

j. **Urgency Level (Required)**: Select a value related to the client's urgency need relative to their request.

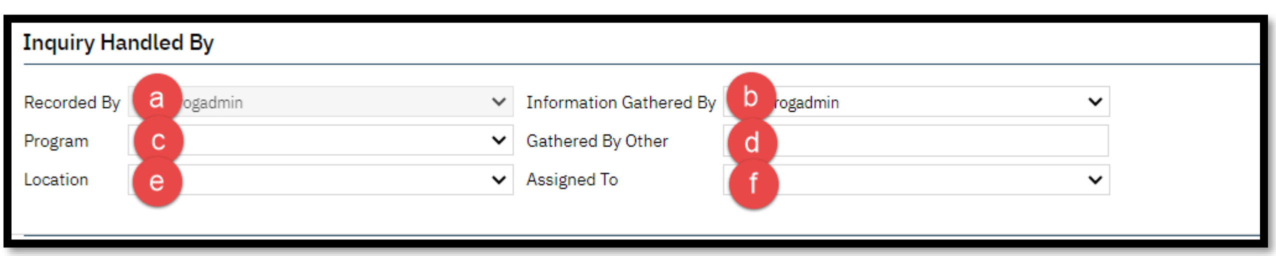
k. **Inquiry Type:** Select a value to categorize the type of Inquiry.

l. **Contact Type (Required):** Select a value to describe the mode of contact used by the client.

m. **Current Client Information** (If any): If the client for whom an Inquiry is being documented has previously been a client with the organization, the following information, if it is in the client's record, initializes here:

- Client ID
- Last Inquiry Date
- Coverage History
- Episode Number from Episodes tab of client information
- Registration Date from Episodes tab of client information
- Discharge Date from Episodes tab of client information

n. **Presenting Problem:** Free text to enter the client's presenting problem.



1. **Field Definitions: Inquiry Handled By**

a. **Recorded:** Defaults to the logged in user and cannot be edited.

b. **Information Gathered By:** Select which staff member gathered the information from the client. This is usually the same as Recorded By. However, if an Inquiry is received by one person and logged by another, this field is available.

c. **Program:** Select which program information or services were being inquired about or by which program the Inquiry was handled.

d. **Gathered By Other:** Enter text to note if the Inquiry was gathered by someone other than a staff member, such as a community partner.

e. **Location:** Select where the client was calling from.

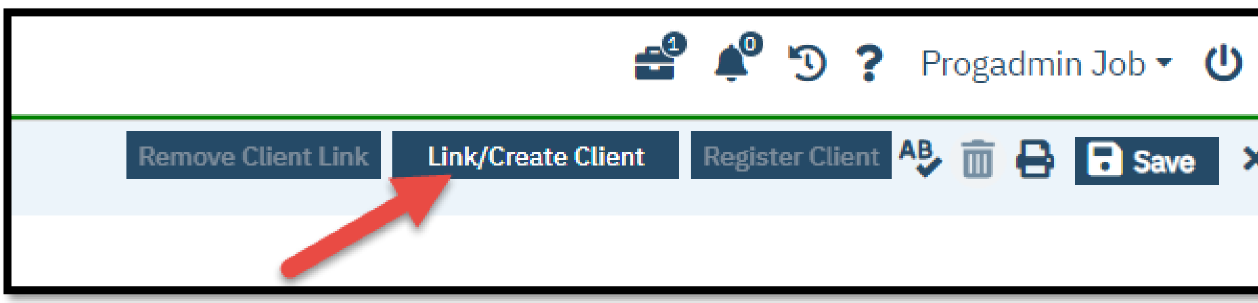
f. **Assigned to**: Select to whom the Inquiry is assigned.

4. When finished entering information, click the Save button in the top right corner

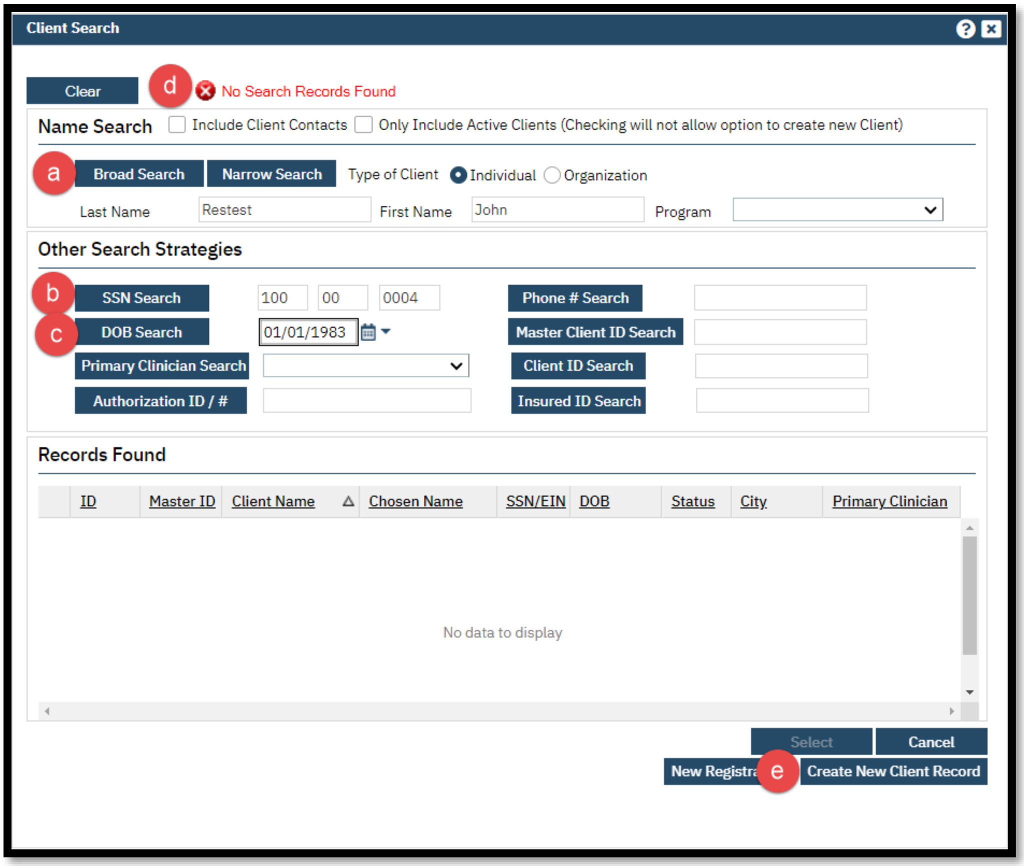
Create New Client If Needed

If the client was not found in the above client search, they must be created now.

1. Select the "Link/Create Client" button at the top of the Inquiry Details. This will bring up the client search window.



2. To verify that the client is not already in the system the search must be repeated.
   a. Click the Broad Search or Narrow Search button.
   b. Click the SSN Search button
   c. Click the DOB Search button
   d. If no records are found based on the search you do, an alert will show at the top of the window
   e. The Create New Client Record button will become active



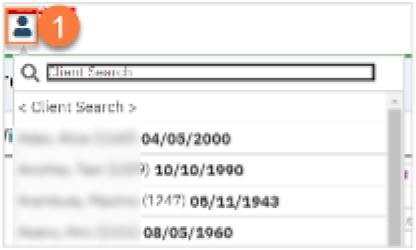
3. Click the Create New Client Record button
4. The Client Search window will close and the new Client ID and Current Client Information fields will populate on the Inquiry Details.

Client has now been created but must be added to your program before documentation can occur.

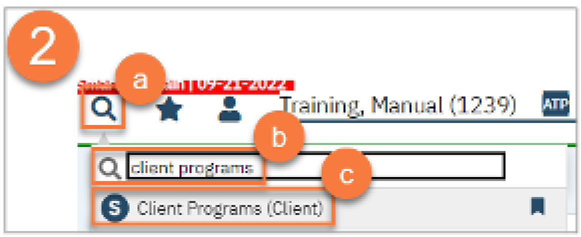
Requested Program Enrollment

Client must have at least a Requested Program Enrollment to document any further. Making the Enrollment "Requested" allows you to screen the client without having them fully enrolled in your program.

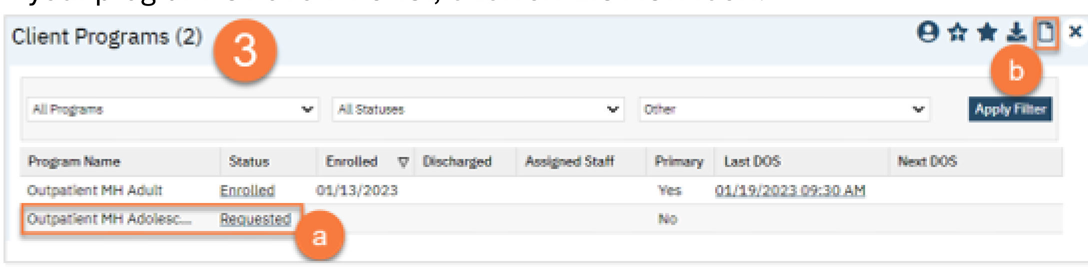
1. **Open the client's record**, if not already done so. You can do this using the Client Search screen.



2. **Open the Client Programs list page**.
    a. **Click the Search icon**.
    b. **Type "Client Program"** in the search bar.
    c. **Select "Client Programs (Client)"** from the search results.

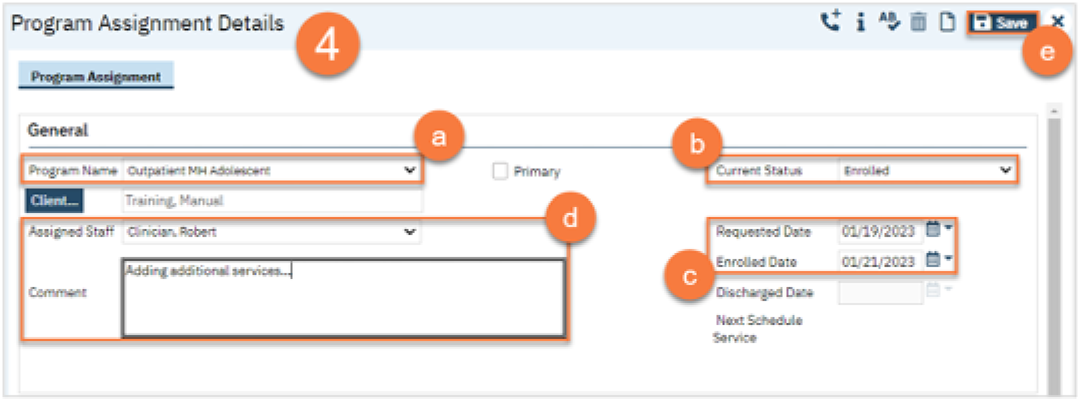


3. This opens the Client Programs list page**.**
    a. If your program is on the list, **click on the link in the Status column**. The status is likely Requested, if the process has been started. If the status is Discharged, do not edit this enrollment and instead add your program as if it's a new program by clicking on the New icon.
    b. If your program is not on the list, **click on the New icon**.



4. Complete the Client Program Details screen.
    a. If not already done so, **select your program** from the dropdown menu.
    b. **Enter the status of the program as "Requested".**
    c. **Enter the Requested date.** This will be today's date.
    d. **If known, enter the assigned staff.** You can also enter any comments related to this requested program enrollment.

e. **Click Save.**



Collect Information Necessary for Billing

[How to Complete a CalOMS Admission]
[How to Complete a CalOMS Referral/Transfer]

Screening

[How to Complete a BQuIP SUD Screening Tool]

Timeliness

SmartCare has 2 Timeliness documents available for SUD

[How to Complete the DMC Opioid Timeliness Record]
[How to Complete the DMC Outpatient Timeliness Record]

ASAM

[ASAM Assessment]

Service Entry

[How to Write a Progress Note for an Unscheduled Service]

SAS Procedures

1. SUD Screening (H0001)
2. Comprehensive Community Supports (H2015)
3. Psychosocial Rehab – Individual (H2017)

4. Team Case Conference with Client/Family absent (99368)
5. TCM/ICC (T1017)
6. Self-help/peer service (H0038)
7. Sign Language or Oral Interpretive Services (T1013) (add on only)
8. Medication Administration (H0033)
9. Medication Training and Support (H0034)
10. Behavioral Health Prevention Education service (H2035)

Results of Screening

Screening or ASAM Indicates Client Will not Receive Services

How to Close a Client to a Program

Screening Indicates Client Should be Scheduled for an Appointment and Assessed

How to Add the Client to Your Program

ASAM Indicates Client Should be Admitted to a Level of Care

Enroll client in Residential Program see **Training – Residential Services**