

Residential Workflow Change

Scheduled Admit is not working as expected. Use this workflow instead.

Requested Enrollment in Program

These are the steps to place the client in a Requested Enrollment status. This will allow you to document TADT/ASJ and allow Optum to provide Authorization but it does not fully enroll the client in your program.

1. After you have looked up the client, Search for and select Client Programs (Client).
2. This will take you to the list of Programs the client is open to. Make sure your Program is not already in the list. The list may be filtered at the top to show only enrollments of specific status:
 - a. All Statuses – this is the best setting to see all Enrollments
 - b. Requested
 - c. Enrolled
 - d. Discharged
 - e. Not Discharged
3. To open the client to your program in a Requested status click the New icon in the upper right corner.
4. When the Program Assignment Details screen opens complete the fields:
 - a. Program Name – Required. If you are a 3.1 / 3.3 / 3.5 SUD residential program, choose your 3.1 program if you are unsure of which LOC.
 - b. Assigned Staff – Optional
 - c. Current Status – Requested
 - d. Requested Date – Leave this with the current date/time
5. Click Save.

Admit Client to Bed

When the client arrives go to the Residential Board and Admit the client to the bed. This will update the Assignment to “Enrolled” status and enter the date/time.