Substance Use Disorder Timely Access Data Tracking

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Timely Access Data Tracking Requirements

- On an annual basis, DHCS issues new requirements and guidance related to Network Certification, inclusive of timely access data.
- BHIN 22-033 indicates the expanded timely access data reporting requirements for Drug Medi-Cal-Organized Delivery System (DMC-ODS) Plans.
- These requirments are in-line with those of the Mental Health Plan (MHP) for Specialty Mental Health Services (SMHS).
- **Timely access data collection applies to initial requests for SUD services across the continuum of care.**
- The purpose is to determine if the DMC-ODS provides timely appointment offers and utimately timely access to assessment and treatment services.
- New templates have been created in Clinician’s Gateway to track this information and will go live on 12/1.
- **Providers should begin using these templates effective immediately and no later than by 12/5/22**.

Timely Access Data Tracking Requirements

The following are the required timely access data elements:

- Date of First Contact to Request Services
- Assessment Appointment First Offer Date
- Assessment Appointment Second Offer Date
- Assessment Appointment Third Offer Date
- Assessment Appointment Accepted Date
- Assessment Start Date
- Assessment End Date
- Treatment Appointment First Offer Date
- Treatment Appointment Second Offer Date
- Treatment Appointment Third Offer Date
- Treatment Appointment Accepted Date
- Treatment Start Date
- Closure Reason and Closure Date

"Assessment" refers to the initial screening appointment and not the *completed* ASAM assessment.

New and Updated Templates in Clinician's Gateway

- **Screening ALOC (Portals)(2022-11) Template:**
  - This is the existing template that is used by the Portal providers for initial screening and referral.
  - The template was updated to capture required timely access data elements.

- **Portal Screener Follow-up Template:**
  - This is a new template that was created for use by SUD providers to track the required timely access data elements for clients who are referred to their program through the Portal. **NOTE**: **This template does NOT need to be completed for referrals from Cherry Hill**. In those cases, the client has already received withdrawal management at Cherry Hill and the referral is not for initiating treatment, rather for transition of services.
  - The initial referral information is imported into the template from the Portal Screener template.
  - The template can be completed by administrative staff as it does not include clinical content.

- **Portal Screener Walk-Ins/Calls Template:**
  - This is a new template that was created for use by SUD providers to track the required timely access data elements for walk-ins (clients not referred by the Portal).
  - The template includes a section titled Urgency Questions. Although the assessment of clinical urgency should be done by a clinical staff member (SUD Counselors and LPHAs), the template itself can be completed by administrative staff.

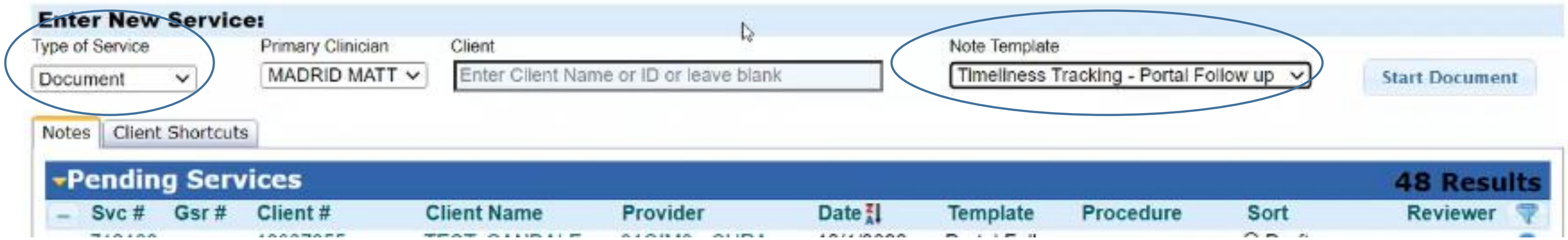
Completing the Forms

- The templates are designed so that they can be completed part way multiple times as new information becomes available.
- A user can save the form as draft and then reopen when needed and continue their documentation. Only the author can edit their own note.
- In cases where a different user needs to add timely access information, the user will have the option to pre-populate the new template from an earlier partial document that was finalized or to forward the document to another author.
- Each agency can decide on a process that works best for them. However, it is recommended that the form be completed in real time as information becomes available.
- Residential programs are urged to complete the form in real time. This is because Center Point is required to follow up on all clients who are referred to SUD programs to ensure they are actually connected. By entering the data into the form, Center Point can see the information in real time and will no longer need to contact the agency for this information.

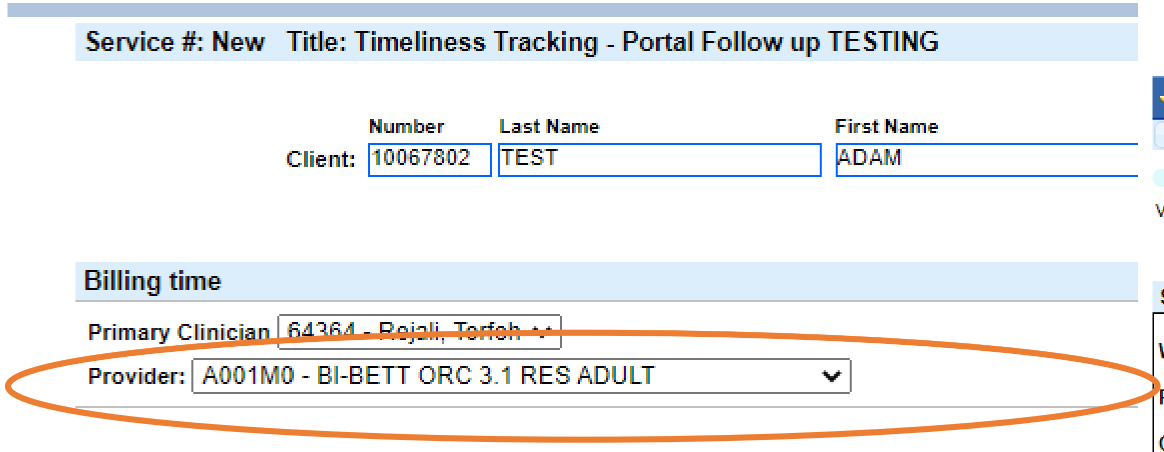
These forms can be created without opening a case in InSYST

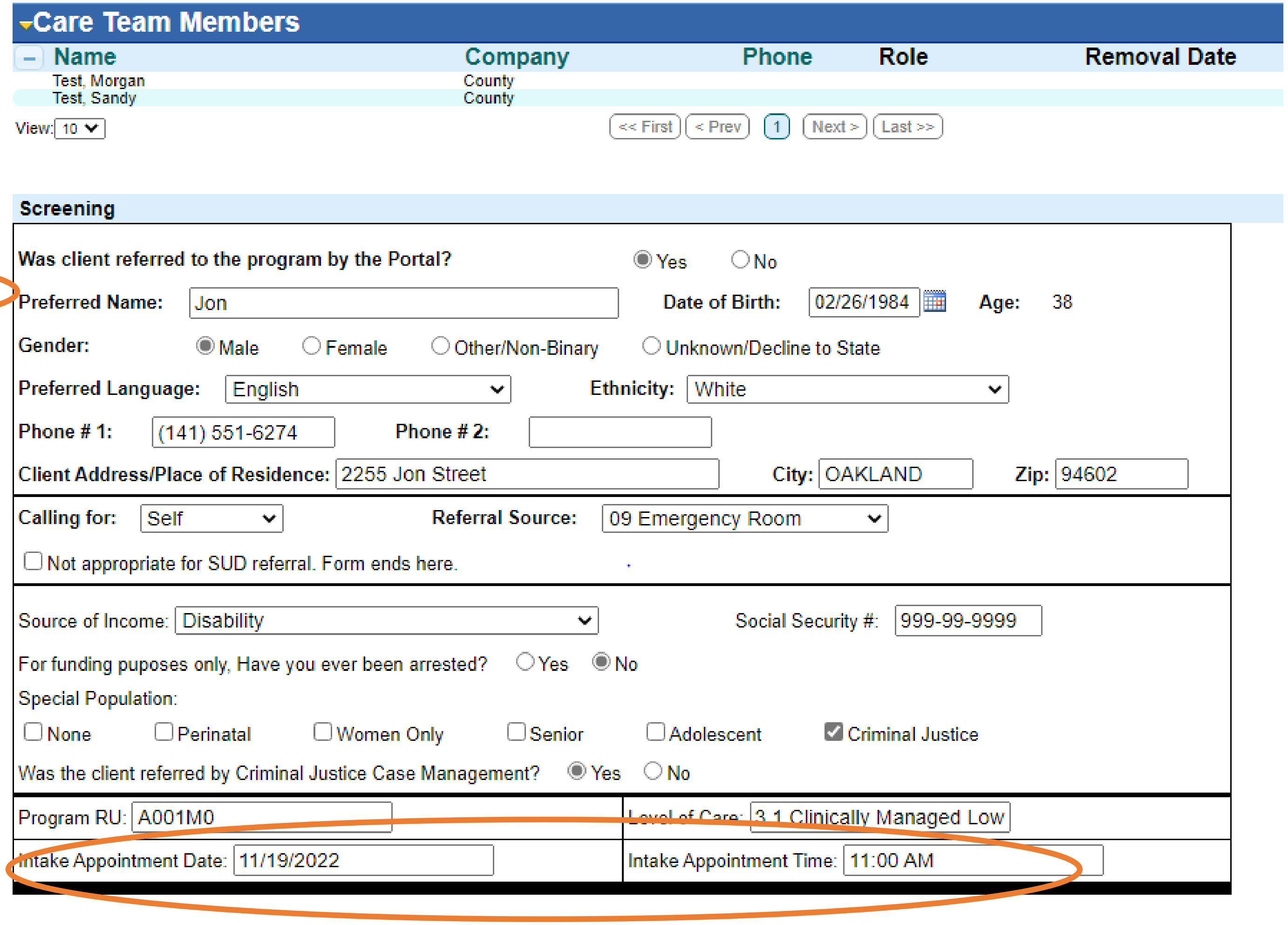
Portal Screener Follow-up Template

To find the appropriate template, choose, “Document” in the “Type of Service” field



Portal Screener Follow-up Template



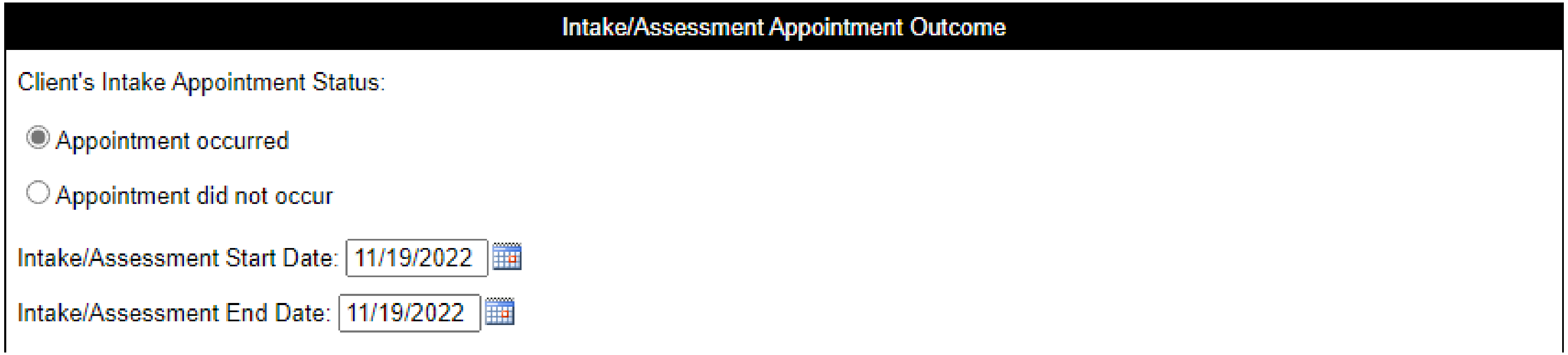


- Once the Client and Provider field are completed, the information matching the referral automatically imports from the *Screening ALOC (Portals)(2022-11)* Template.
- This includes Date of First Contact (when client contacted ACCESS) and the Intake Appointment Date and Time that was offered to the client.
- The client information can be edited if necessary.

Step 1

Complete the Intake/Assessment Appointment Outcome

Intake/Assessment Appointment Outcome


Intake/Assessment Appointment Outcome

Client's Intake Appointment Status:

(•) Appointment occurred

( ) Appointment did not occur

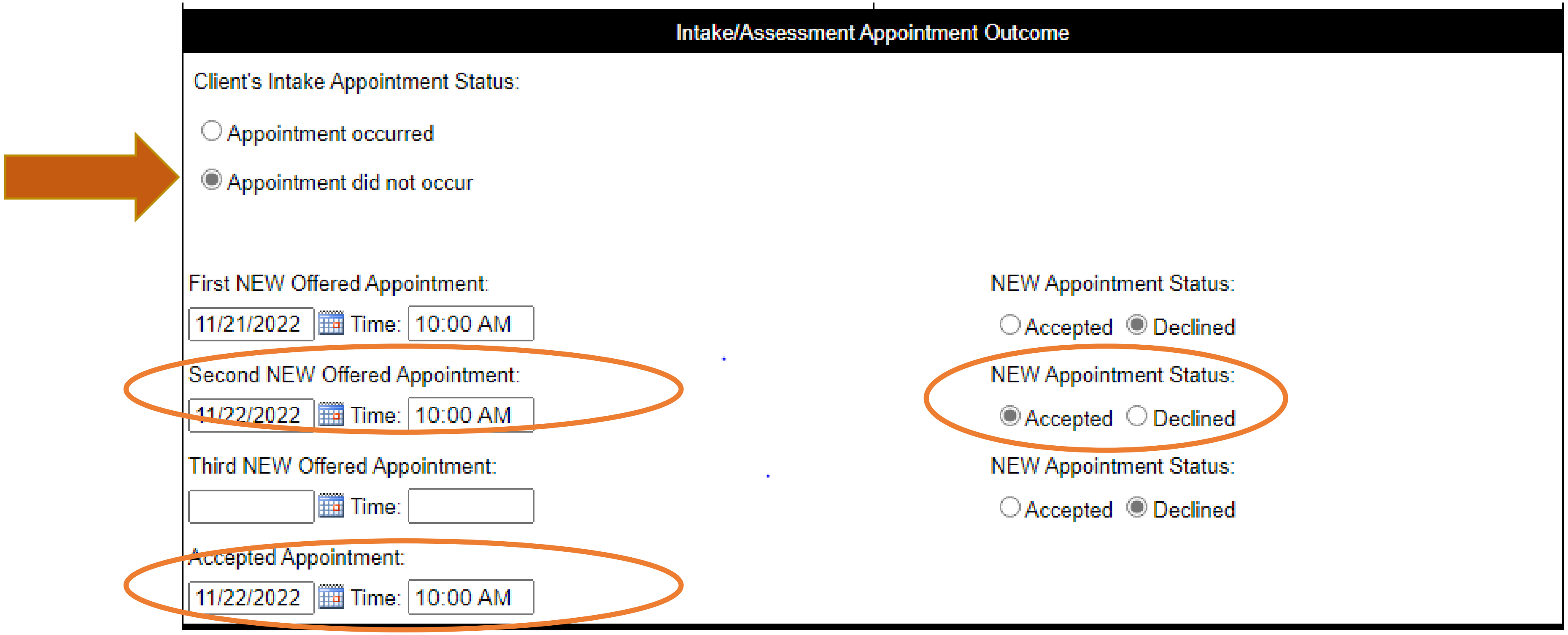
Intake/Assessment Start Date: 11/19/2022

Intake/Assessment End Date: 11/19/2022

- If the Intake appointment occurred, check "Appointment Occurred"
- Enter the date the Intake/Assessment appointment started and ended:
  - "Intake/Assessment Start Date": Date full ASAM assessment is started or brief screening is completed and it is determined that the client meets access criteria
  - "Intake/Assessment End Date": Date assessment is completed
- For some programs (e.g. Opioid Treatment Programs), Intake/Assessment Start and End Date may be the same dates

Move on to the "Treatment Appointment Information" section

Intake/Assessment Appointment Outcome


Intake/Assessment Appointment Outcome

Client's Intake Appointment Status:

○ Appointment occurred

◉ Appointment did not occur

First NEW Offered Appointment: 11/21/2022 Time: 10:00 AM

NEW Appointment Status: ○ Accepted ◉ Declined

Second NEW Offered Appointment: 11/22/2022 Time: 10:00 AM

NEW Appointment Status: ◉ Accepted ○ Declined

Third NEW Offered Appointment: Time:

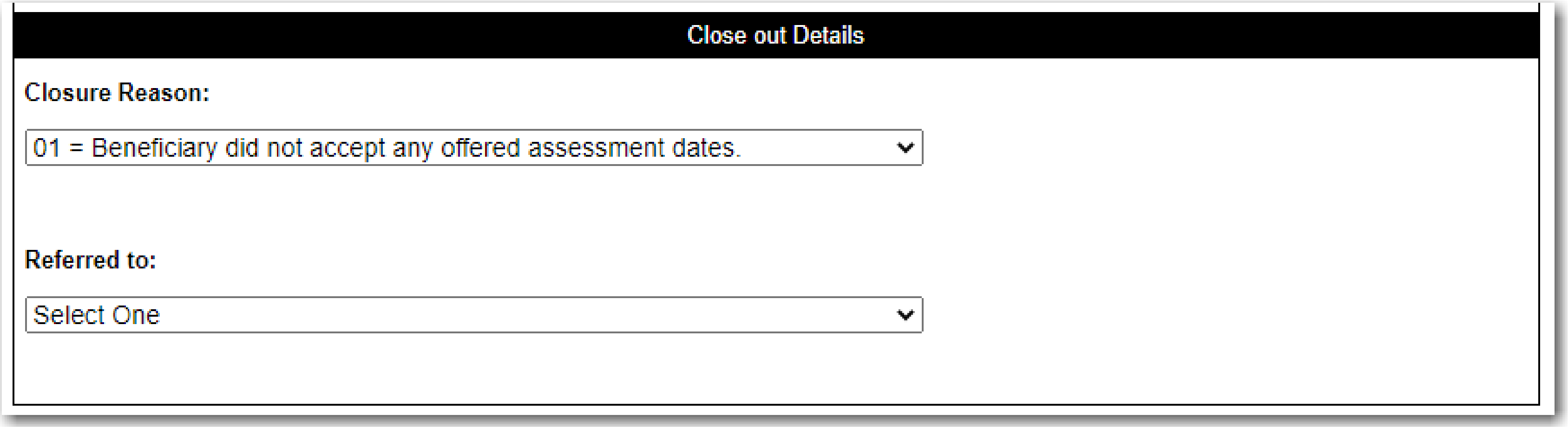
NEW Appointment Status: ○ Accepted ◉ Declined

Accepted Appointment: 11/22/2022 Time: 10:00 AM

- If the Intake appointment did not occur and you offer new Intake appointments, document the first three appointments you offer the client. If the first one is accepted, nothing else is needed.
- The "Accepted Appointment" fields are auto populated based on your selections.
- If more than 3 appointments are offered, document the 3 appointments that were declined and manually enter the "Accepted Appointment" date.

SAVE the form as DRAFT and return to it after the Intake/Assessment appointment date.

Intake/Assessment Appointment Outcome – No Engagement


Close out Details

Closure Reason:

01 = Beneficiary did not accept any offered assessment dates.

Referred to:

Select One

- If the Intake appointment did not occur and therefore no treatment appointments occurred, the timeliness tracking will be terminated. Indicate that no assessment appointments and no treatment appointments occurred.
- **The Closure Date and Closure Reason are required. Find these fields at the end of the document**

Step 2

Complete the Treatment Appointment Information

Treatment Appointment Information

Treatment Appointment Information	
First Offered Treatment Appointment: 11/28/2022 Time: 01:00 PM	Appointment Status: ○ Accepted ◉ Declined
Second Offered Treatment Appointment: 11/29/2022 Time: 10:00 AM	Appointment Status: ○ Accepted ◉ Declined
Third Offered Treatment Appointment: 11/29/2022 Time: 12:00 PM	Appointment Status: ◉ Accepted ○ Declined
Accepted Treatment Appointment: 11/29/2022 Time: 12:00 PM	

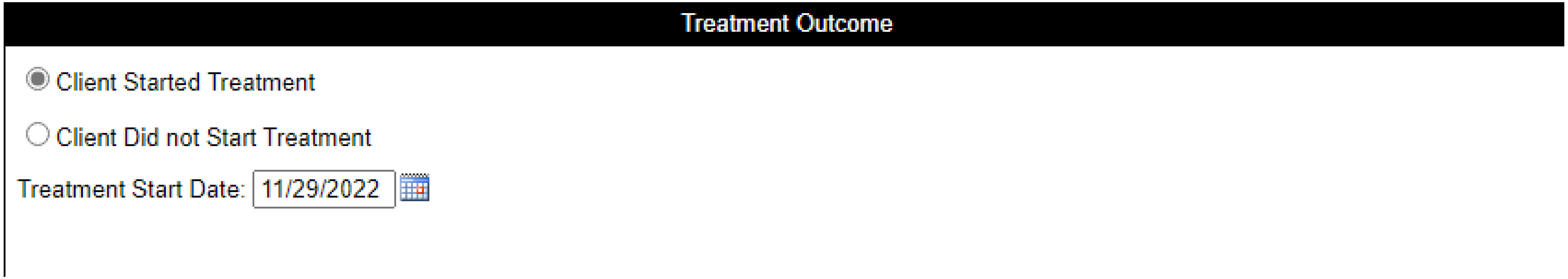
- Once Intake/Assessment appointment is completed and you establish that the client meets criteria for your program, document the first three treatment appointments you offer the client.
- If the first one is accepted, nothing else is needed.
- The “Accepted Treatment Appointment” fields are auto populated based on your selections.
- If more than 3 appointments are offered, document the 3 appointments that were declined and manually enter the “Accepted Treatment Appointment” date.

SAVE the form as DRAFT and return to it after the Treatment appointment date.

Step 3

Complete the Treatment Outcome

Treatment Outcome-
Client Started Treatment

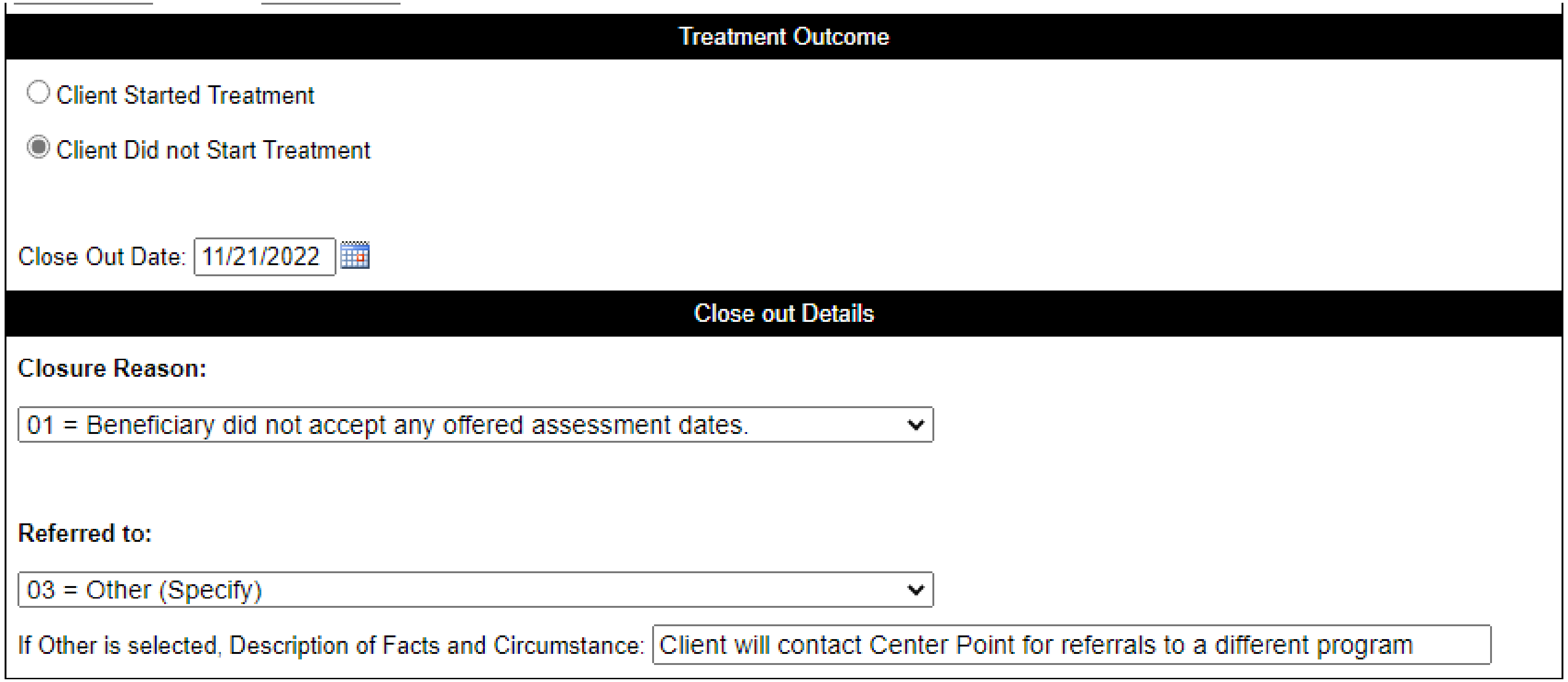


- Once the client starts treatment, note the treatment outcome and start date and SAVE your note.
- Treatment Start Date is the date the client begins attending the treatment program.

SAVE the form. You have completed Timely Access Tracking.

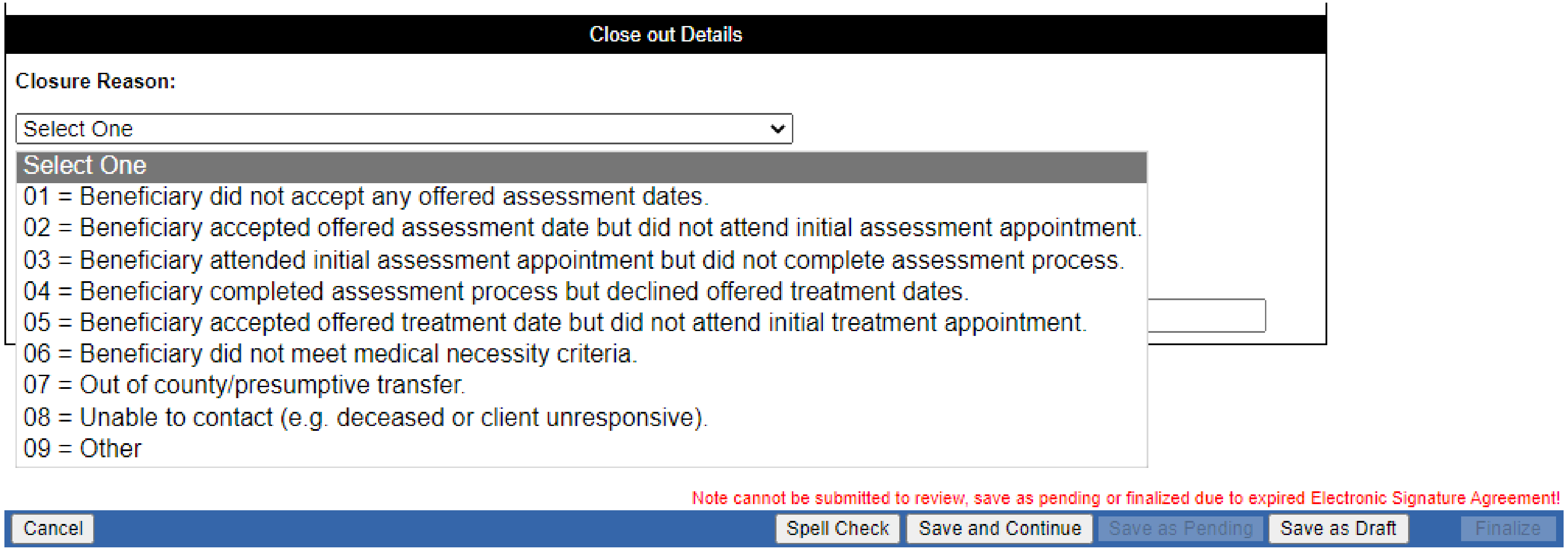
For AB109 and Collaborative Court referrals, complete the Close the Loop Form.

Treatment Outcome-
Client Did not Start Treatment



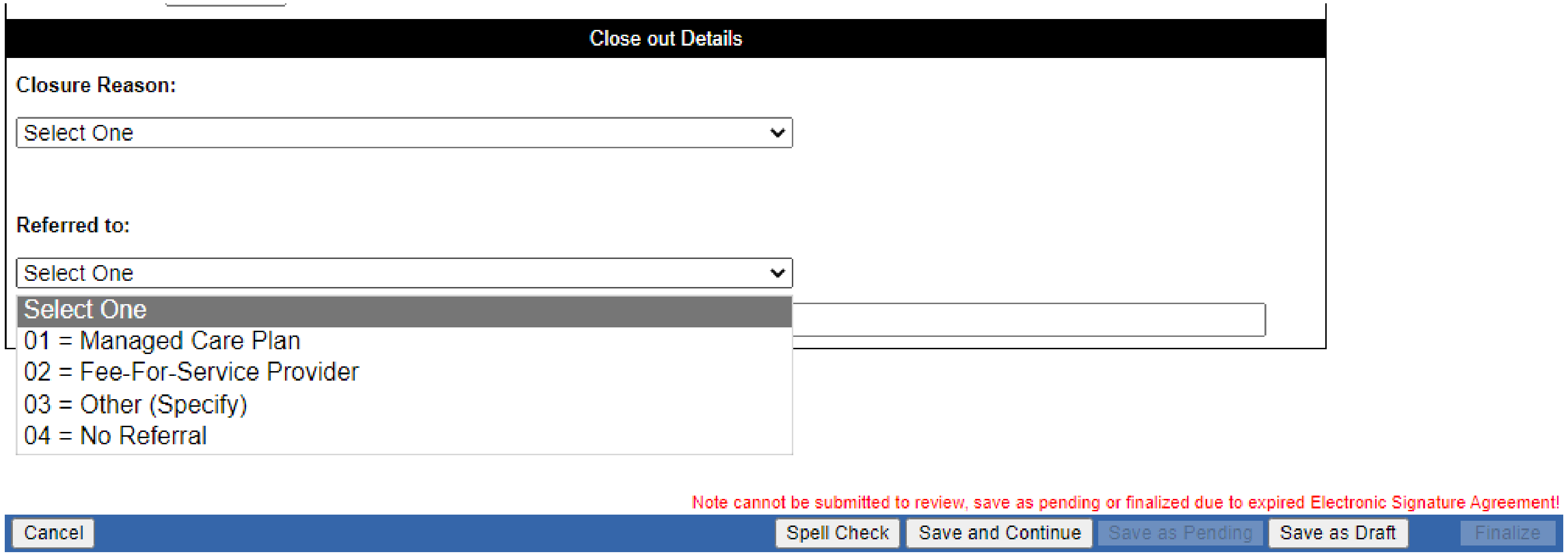
- If the process terminates without the client accepting an appointment or starting treatment, choose "Client Did not Start Treatment" in the *Treatment Outcome* Section
- Complete the Close Out Details

Client Did not Start Treatment “Closure Reasons”



- Choose the appropriate “Closure Reason”

Client Did not Start Treatment "Referred to"



- Complete the "Referred to" field

Save the form. You have completed Timely Access Tracking.

For AB109 and Collaborative Court referrals, complete the Close the Loop Form.

Timeliness Tracking Walk-ins or Calls Template

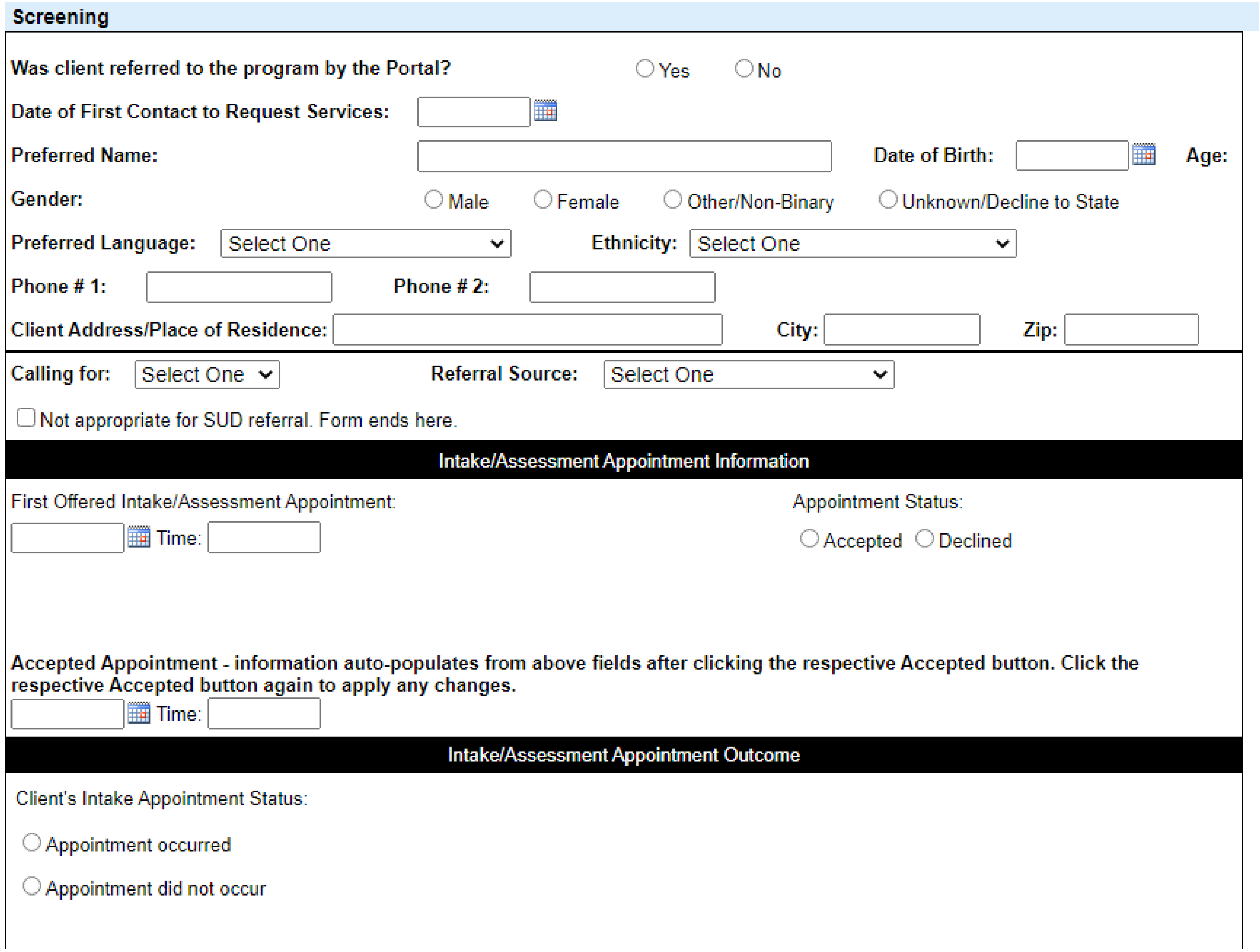
Timeliness Tracking Walk-ins or Calls

- The *Timeliness Tracking Walk-ins or Calls* was created for use by SUD providers to track the required timely access data elements for walk-ins (clients not referred by the Portal).
- For this reason, there is nothing to import from the *Screening ALOC (Portals)(2022-11)* template.
- There are two additional sections in this form that need to be completed by the provider:
  - Screening
  - Urgency Questions
- All the other fields and sections work the same way as with the *Portal Screener Follow Up Template.*
- Although the clinical assessment of urgency should be done by a clinician, the template itself can be completed by an administrative staff person.

Timeliness Tracking Walk-ins or Calls

This is the date the client contacts your program for services

Date of Birth is important for client matching when reporting data



Screening

Was client referred to the program by the Portal? ○ Yes ○ No

Date of First Contact to Request Services:

Preferred Name: Date of Birth: Age:

Gender: ○ Male ○ Female ○ Other/Non-Binary ○ Unknown/Decline to State

Preferred Language: Select One Ethnicity: Select One

Phone # 1: Phone # 2:

Client Address/Place of Residence: City: Zip:

Calling for: Select One Referral Source: Select One

☐ Not appropriate for SUD referral. Form ends here.

Intake/Assessment Appointment Information

First Offered Intake/Assessment Appointment: Time:

Appointment Status: ○ Accepted ○ Declined

Accepted Appointment - information auto-populates from above fields after clicking the respective Accepted button. Click the respective Accepted button again to apply any changes.

Time:

Intake/Assessment Appointment Outcome

Client's Intake Appointment Status:

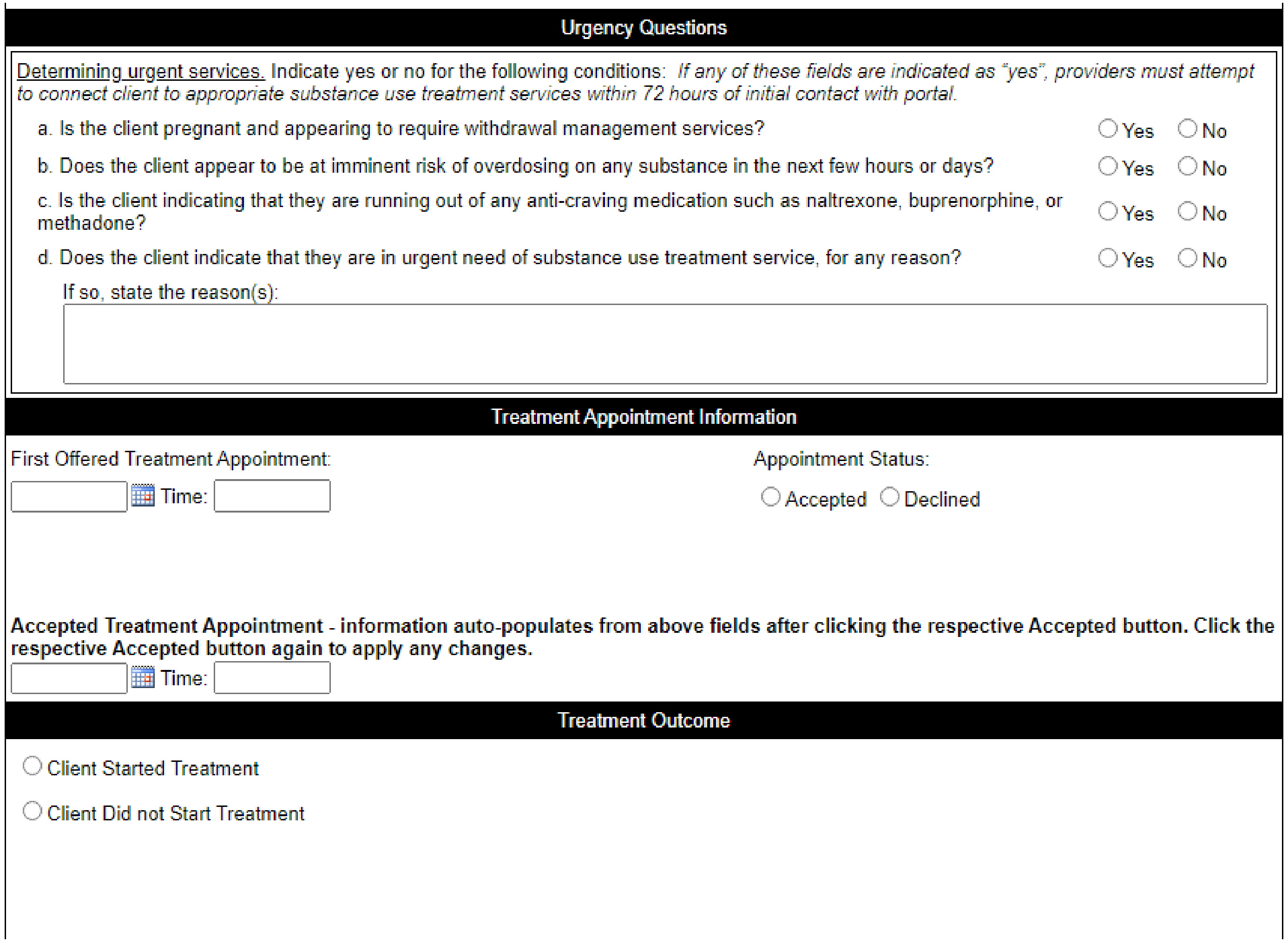
○ Appointment occurred

○ Appointment did not occur

Timeliness Tracking Walk-ins or Calls

The urgency level should be assessed by a clinical staff member.

The data may be entered by Administrative Staff, or the document can be forwarded to another staff for input



Urgency Questions

Determining urgent services. Indicate yes or no for the following conditions: *If any of these fields are indicated as "yes", providers must attempt to connect client to appropriate substance use treatment services within 72 hours of initial contact with portal.*

a. Is the client pregnant and appearing to require withdrawal management services? ○ Yes ○ No

b. Does the client appear to be at imminent risk of overdosing on any substance in the next few hours or days? ○ Yes ○ No

c. Is the client indicating that they are running out of any anti-craving medication such as naltrexone, buprenorphine, or methadone? ○ Yes ○ No

d. Does the client indicate that they are in urgent need of substance use treatment service, for any reason? ○ Yes ○ No

If so, state the reason(s):

Treatment Appointment Information

First Offered Treatment Appointment:

Time:

Appointment Status:

○ Accepted ○ Declined

Accepted Treatment Appointment - information auto-populates from above fields after clicking the respective Accepted button. Click the respective Accepted button again to apply any changes.

Time:

Treatment Outcome

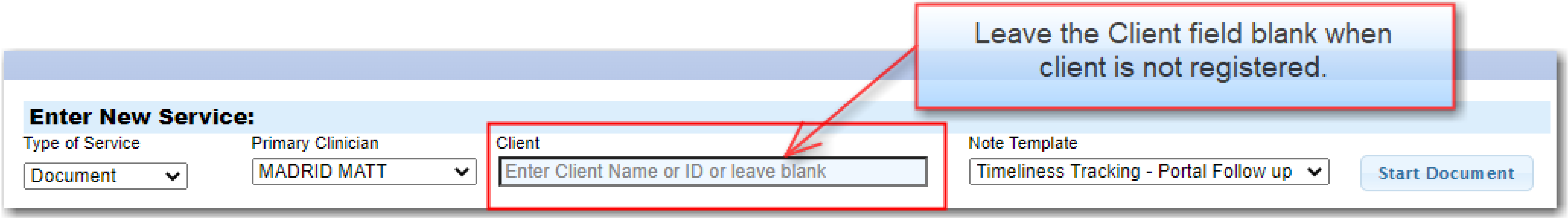
○ Client Started Treatment

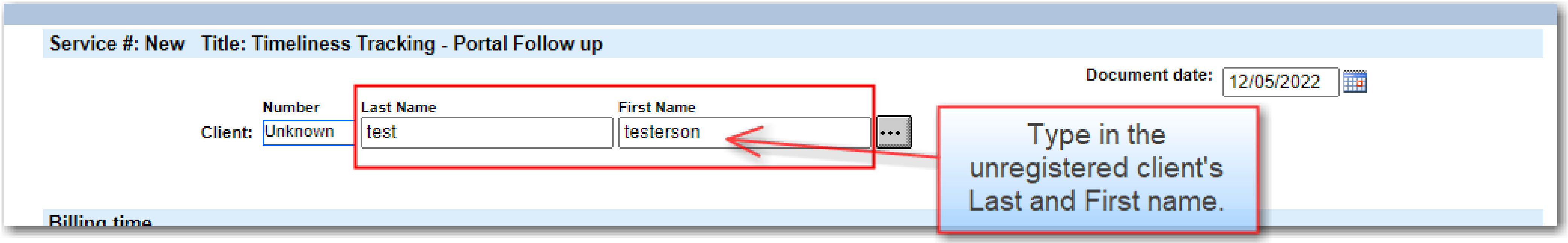
○ Client Did not Start Treatment

Scenarios

Starting a note when a client is not yet registered in the system

In cases where a client is not yet registered, and therefore does not have a client ID #, leave the client field blank when you start the document. Type the client's name into the edit screen.

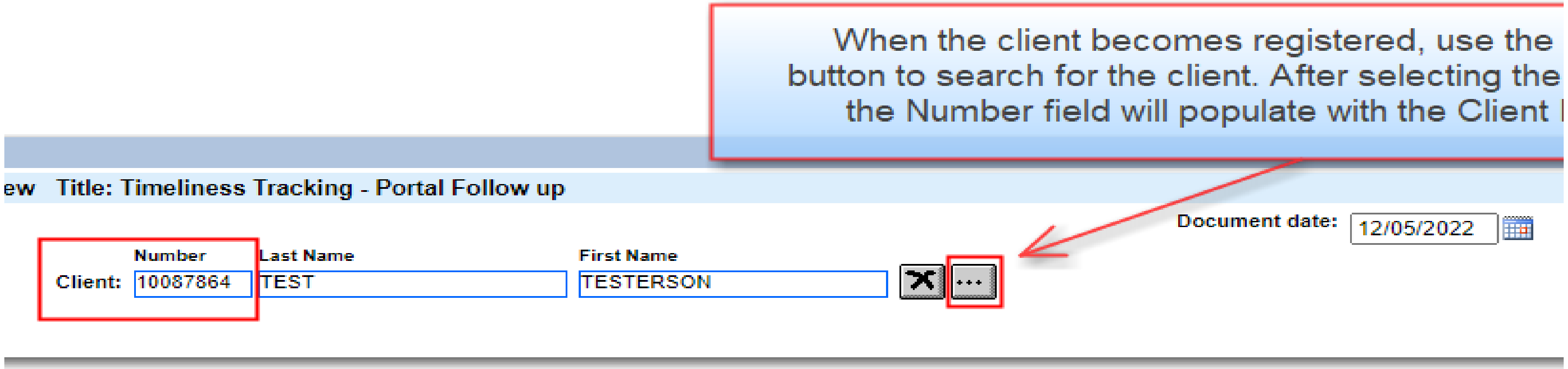




Adding the client ID IF the client is registered in the system

If the client becomes registered, add the client ID # to the document. This associates the timeliness data to the official client ID.

- Pull up the note and choose "Edit"
- From the Edit screen, click on the "…" ellipsis button.
- Search for the client
- Click on the client in the results list
- The client ID will be added to the note.



Saving a note when a client is never registered in the system

In cases where a client does not follow through with treatment and therefore a case is never opened in InSYST, the provider should Archive the template to remove if from the Pending Services list, but retain the information in CG.

In this example, user Matt Madrid has a draft of a Walk-Ins document for client Ben Kenobi (fictitious name) in his Pending Services list.

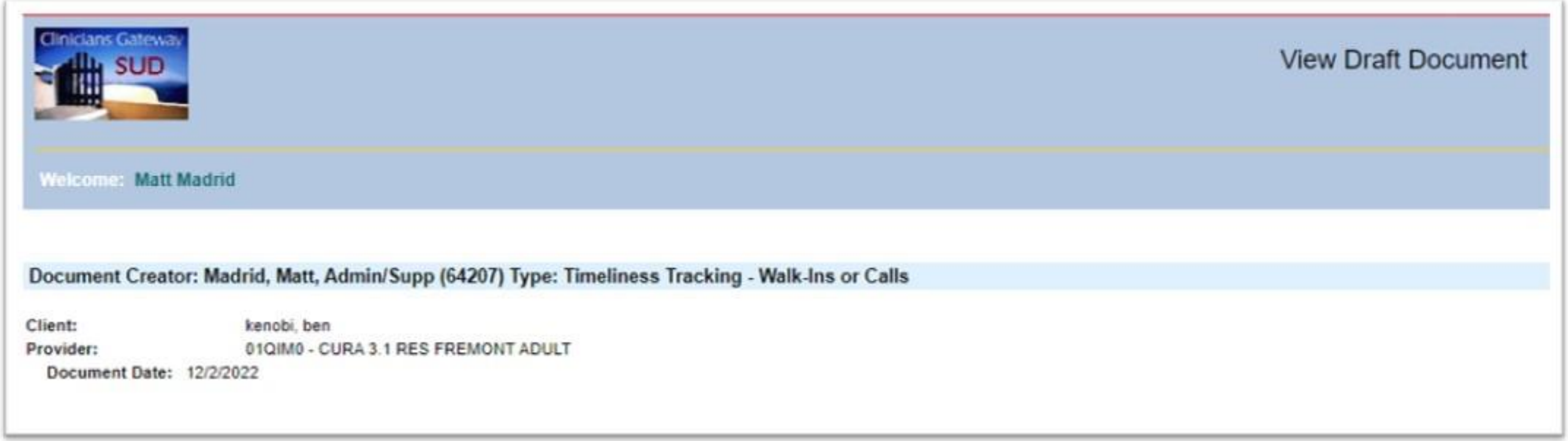
Notes | Client Shortcuts

Pending Services — **50 Results**

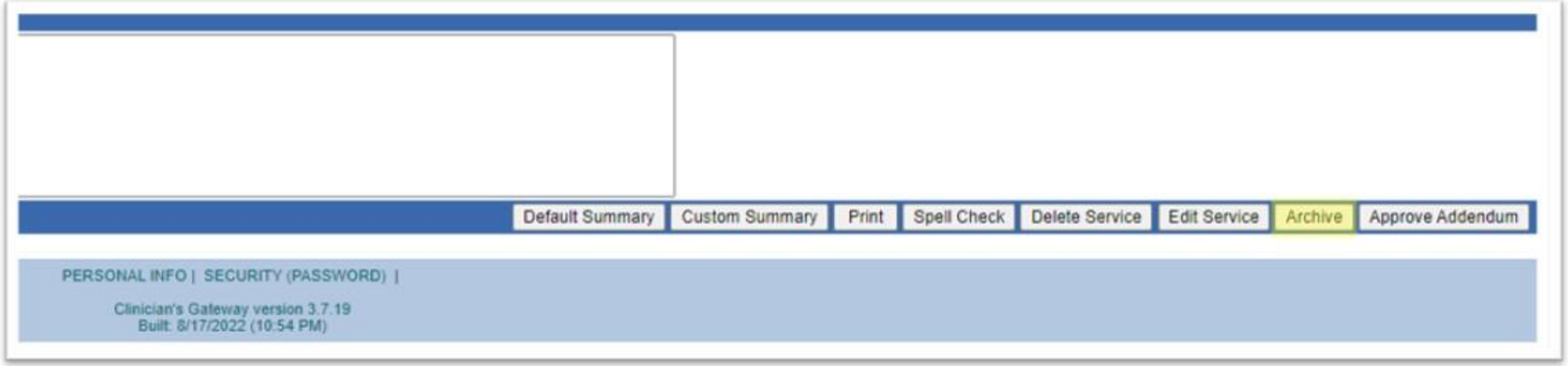
Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
712791		10087955	TEST, GANDALF	01QIM0 - CURA ...	12/2/2022	Portal Foll...		Draft	
713241			kenobi, ben	01QIM0 - CURA ...	12/2/2022	Walk-Ins o...		Draft	
712168		10087955	TEST, GANDALF	01QIM0 - CURA ...	12/1/2022	Portal Foll...		Draft	
712176			test, testerson	01QIM0 - CURA ...	12/1/2022	Walk-Ins o...		Draft	
710750		10087955	TEST, GANDALF	999CGS - CLINI...	11/29/2022	Portal Foll...		Draft	
710818		10087955	TEST, GANDALF	999CGS - CLINI...	11/29/2022	Portal Foll...		Draft	
695476		10087955	TEST, GANDALF	999CGS - CLINI...	10/27/2022	Screening	197 SUD CG I...		
691590		10087955	TEST, GANDALF	999CGS - CLINI...	10/19/2022	Screening	197 SUD CG I...	Draft	
691064		10087955	TEST, GANDALF	999CGS - CLINI...	10/18/2022	Screening	197 SUD CG I...	Draft	
689154		10087955	TEST, GANDALF	999CGS - CLINI...	10/14/2022	Screening	197 SUD CG I...	Draft	

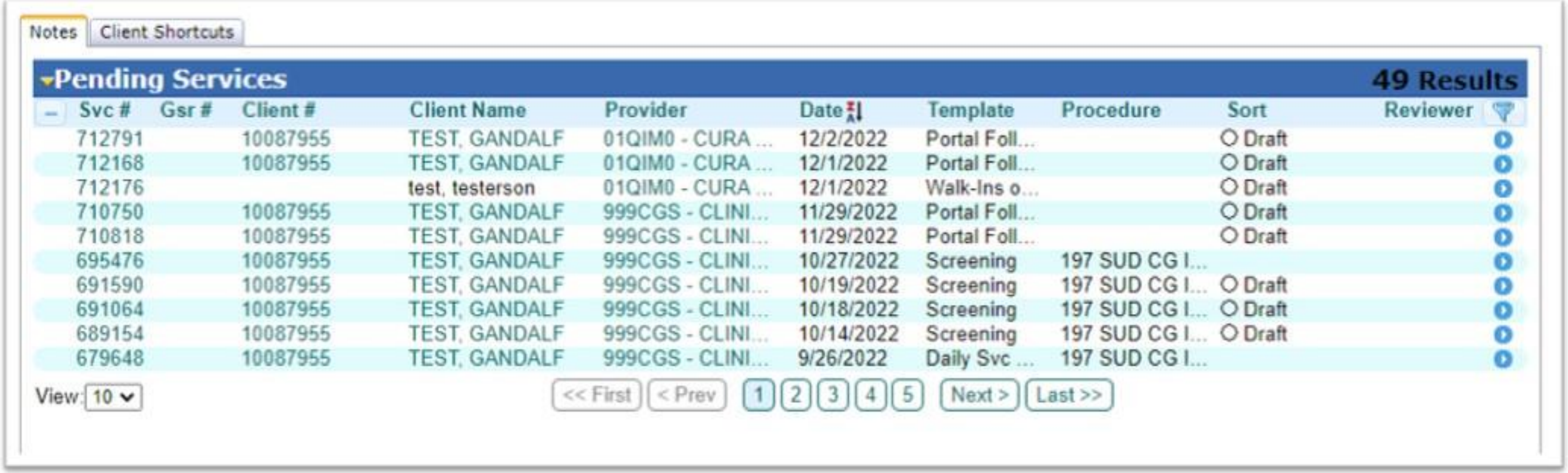
View: 10 << First < Prev 1 2 3 4 5 Next > Last >>

Because the client is not yet registered in our system, the document cannot be finalized.



Instead, the user can navigate to the note and click Archive at the bottom of the View Draft Document screen.





Notes | Client Shortcuts

Pending Services — 49 Results

Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
712791		10087955	TEST, GANDALF	01QIM0 - CURA ...	12/2/2022	Portal Foll...		Draft	
712168		10087955	TEST, GANDALF	01QIM0 - CURA ...	12/1/2022	Portal Foll...		Draft	
712176			test, testerson	01QIM0 - CURA ...	12/1/2022	Walk-Ins o...		Draft	
710750		10087955	TEST, GANDALF	999CGS - CLINI...	11/29/2022	Portal Foll...		Draft	
710818		10087955	TEST, GANDALF	999CGS - CLINI...	11/29/2022	Portal Foll...		Draft	
695476		10087955	TEST, GANDALF	999CGS - CLINI...	10/27/2022	Screening	197 SUD CG I...		
691590		10087955	TEST, GANDALF	999CGS - CLINI...	10/19/2022	Screening	197 SUD CG I...	Draft	
691064		10087955	TEST, GANDALF	999CGS - CLINI...	10/18/2022	Screening	197 SUD CG I...	Draft	
689154		10087955	TEST, GANDALF	999CGS - CLINI...	10/14/2022	Screening	197 SUD CG I...	Draft	
679648		10087955	TEST, GANDALF	999CGS - CLINI...	9/26/2022	Daily Svc ...	197 SUD CG I...		

View: 10 << First < Prev 1 2 3 4 5 Next > Last >>

This removes the document from Matt’s Pending Services list but retains it in the system.
The note can still be retrieved by a services search or by going to the user’s View Staff page.

One user starts the tracking and another adds to it

- Only the author can update their note but other users can continue the note by importing from the original template. Here is how it is done.

- One user can finalize a Timeliness Tracker document, and then another user can start a new document in the same RU. The completed fields from the original document transfer over. In this example, a Services Search shows that user Matt Madrid has finalized a Portal Follow-up with the Intake/Assessment Start and End dates filled in. Then later, user Mary Test started a new Portal Follow-up. It was pre-populated with the dates that user Matt had entered.

Services — 154 Results

Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
712791	10087955	TEST, GANDALF	01QIM0 - CURA 3.1 RES F...	12/2/2022	Draft	Portal Follow ...		Document
712818	10087955	TEST, GANDALF	01QIM0 - CURA 3.1 RES F...	12/2/2022	Finalized	Walk-Ins or C...		Document
713207	10087955	TEST, GANDALF	01QIM0 - CURA 3.1 RES F...	12/2/2022	Finalized	Portal Follow ...		Document

Subsequent tracker started (pre-populated) after previous tracker was finalized.

Frequently Asked Questions

Question	Answer
At our agency, if a client does not show up to their appointment, we refer them back to Center Point. What happens in that scenario?	Center Point will reach out to the client and, in collaboration with the provider, will offer a new assessment appointment. Center Point does not create a new *Screening ALOC (Portals)* template in this scenario. It is the responsibility of the provider to open the *Portal Screener Follow-up* Template and add the updates.
What do we do if the client doesn't show up for their assessment appointment and can't be reached to reschedule but then walks into our program 2 weeks later.	Referrals from Center Point are valid for 30 days. If the client contacts you before the 30 days have passed, you would re-open the *Portal Screener Follow-up* Template that you had previously closed and enter in the new assessment and treatment information.

thank you.

Contact QATA @acgov.org for more information

alameda county
behavioral health

SERVICES FOR MENTAL HEALTH & SUBSTANCE USE DISORDERS