

Timeliness Tracking Documents (Portal Follow-up, or Walk-ins/Calls)

Clinicians Gateway SUD 2022-11-23

The Timeliness Tracking templates in Clinicians Gateway are designed to collect timely access data from date of first contact through first treatment or a reason for closure if treatment is not reached. The templates are in the document format, which does not use procedure codes or service duration.

1. **Start the Document.** There are 3 ways to start the Timeliness Tracking Document: from the Client Search, Client Facesheet or from the Home. We will be starting a **Document** rather than an Individual Type of Service.

From Client Facesheet, choose "Start Document"

The screenshot shows the 'Client Information Facesheet' interface. At the top, the title 'Client Information Facesheet' is circled in red. Below it, there is an 'Action' dropdown menu and a 'Generate Patient Code' button. The 'Action' menu is open, and 'Start Document' is highlighted with a red box. A red arrow points from the circled title to the 'Start Document' option. The main content area displays 'CONSUMER INFORMATION' for a client named EST ETTY A. with the following details:

Number:	10088032
Birth Date:	1/1/2000
Age:	22
SSN:	
Gender:	Female
Account:	
Phone:	
Ethnicity:	White
Disability:	None
RP Owes:	\$0.00

From Client Search. Choose "Start Document"

Search: view all close all

Search Again
test bet Search
Clients

▼ Clients 1 Result

Client #	Client Name	Status	Gender	Birth Date	Age	Serviceable	Services
10088032	TEST, BETTY A	Active	Female	01/01/2000	22	<input checked="" type="checkbox"/>	35

View: 50

<< First < Prev 1 Next > Last >>

PERSONAL INFO SECURITY (PASSWORD)

Clinician's Gateway version 3.7.28
Built: 11/9/2022 (10:10 AM)

- Start Individual Service
- Facesheet
- Client Medication
- Start Treatment Plan
- Start Document**
- Account

From the Home page choose the Type of Service "Document", Client, Template Type and Start

For Client: if registered use name or number. If not registered, leave the name blank (more info at #11).

For Template: choose whether client contact was a referral Portal Follow-up or a direct contact Walk-in/Call.

Home

Welcome: Camille Peterson

Choose Type Document

If client is registered, enter client name or ID#
If not registered, leave client field blank

Choose document template type

Enter New Service:

Type of Service: Document

Primary Clinician: PETERSON CAMILLE

Client: Enter Client Name or ID or leave blank

Note Template: Timeliness Tracking - Portal Follow up TESTING

Start Document

Notes Client Shortcuts Lab Results (0 pending)

▼ Pending Services

- Weekly Summary Residential
- Timeliness Tracking - Portal Follow up TESTING**
- Timeliness Tracking - Walk-Ins or Calls TESTING

3 Results

2. Fill in the Header section with Client, Date, Provider (Reporting Unit)

Service #: New Title: Timeliness Tracking - Portal Follow up TESTING

Document date: []

Client: Number 10088032 Last Name TEST First Name BETTY

Billing time

Primary Clinician 62823 - Peterson, Camille

Provider: Select a Provider

3. Fill in the Screening Section

Screening

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

Preferred Name: Date of Birth: Age:

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

Preferred Language: Ethnicity:

Phone # 1: Phone # 2:

Client Address/Place of Residence: City: Zip:

Calling for: Referral Source:

Not appropriate for SUD referral. Form ends here.

Source of Income: Social Security #:

For funding puposes only, Have you ever been arrested? Yes No

Special Population:

None Perinatal Women Only Senior Adolescent Criminal Justice

Was the client referred by Criminal Justice Case Management? Yes No

4. **If this is for a Timeliness Tracker – Walkin/Calls, record the Offered Appointments.** The Accepted Appointment will pre-populate from the last appointment marked as “Accepted”.

Contact Person: <input type="text" value="Silvia Test"/> Appointment was offered through 3 way call between Portal, Client, & Referred Provider <input checked="" type="radio"/> Yes <input type="radio"/> No	First Offered Appointment: <input type="text" value="11/16/2022"/> Time: <input type="text" value="9:00 AM"/>	Appointment Status: <input type="radio"/> Accepted <input checked="" type="radio"/> Declined
Contact Person: <input type="text" value="Silvia Test"/> Appointment was offered through 3 way call between Portal, Client, & Referred Provider <input checked="" type="radio"/> Yes <input type="radio"/> No	Second Offered Appointment: <input type="text" value="11/17/2022"/> Time: <input type="text" value="11:00 AM"/>	Appointment Status: <input type="radio"/> Accepted <input checked="" type="radio"/> Declined
Contact Person: <input type="text" value="Silvia Test"/> Appointment was offered through 3 way call between Portal, Client, & Referred Provider <input checked="" type="radio"/> Yes <input type="radio"/> No	Third Offered Appointment: <input type="text" value="11/18/2022"/> Time: <input type="text" value="4:00 PM"/>	Appointment Status: <input checked="" type="radio"/> Accepted <input type="radio"/> Declined
Contact Person: <input type="text" value="Silvia Test"/> Appointment was offered through 3 way call between Portal, Client, & Referred Provider <input checked="" type="radio"/> Yes <input type="radio"/> No	Accepted Appointment: <input type="text" value="11/18/2022"/> Time: <input type="text" value="4:00 PM"/>	

If referring to an additional ASAM program or Level of Care, check here to open additional fields:

Additionally, you can fill in **Urgency Questions**. 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):

5. **If this is for a Timeliness Tracker – Portal Follow-up,** The **Accepted Intake Appointment will pre-populate** from the latest Portal Screener if the client was referred to one of the RUs on your CG profile.

Program RU: <input type="text" value="A001M0"/>	Level of Care: <input type="text" value="3.1 Clinically Managed Low"/>
Intake Appointment Date: <input type="text" value="11/19/2022"/>	Intake Appointment Time: <input type="text" value="11:00 AM"/>

6. **Indicate if the client kept their assessment/intake appointment.** If they did not, you have the opportunity to add more offered appointments.

Intake/Assessment Appointment Outcome

Client's Intake Appointment Status:

Appointment occurred

Appointment did not occur

First NEW Offered Appointment: Time:

NEW Appointment Status: Accepted Declined

Accepted Appointment: Time:

7. **If they did not keep any assessment appointments** and you close out the episode, then skip to the end of the document and indicate that the Client "Did not Start Treatment", add the closure date and closure reason.

8. **Add the Treatment Appointments offered if** the client has moved toward treatment.

Treatment Appointment Information	
First Offered Treatment Appointment: <input type="text" value="11/25/2022"/> Time: <input type="text" value="2:00 PM"/>	Appointment Status: <input type="radio"/> Accepted <input checked="" type="radio"/> Declined
Second Offered Treatment Appointment: <input type="text" value="11/28/2022"/> Time: <input type="text" value="2:00 PM"/>	Appointment Status: <input type="radio"/> Accepted <input checked="" type="radio"/> Declined
Third Offered Treatment Appointment: <input type="text" value="11/29/2022"/> Time: <input type="text" value="2:00 PM"/>	Appointment Status: <input checked="" type="radio"/> Accepted <input type="radio"/> Declined
Accepted Treatment Appointment: <input type="text" value="11/29/2022"/> Time: <input type="text" value="2:00 PM"/>	

9. Indicate whether the client started treatment or not.

- If the client did not attend their intake/assessment appointment, answer Did not Start Treatment
- If the client did not attend their initial treatment appointment, answer Did not Start Treatment
- If they did not start treatment, enter Close Out Date, Closure Reason, and any referrals made.

Treatment Outcome
<input type="radio"/> Client Started Treatment
<input checked="" type="radio"/> Client Did not Start Treatment
Close Out Date: <input type="text"/>
Close out Details
Closure Reason: <input type="text" value="Select One"/>
Referred to: <input type="text" value="Select One"/>

10. WORKFLOW: Two Possible Workflows

- Multiple Timeliness documents over time:** The document can be finalized with incomplete information. Then as more information is known, another document can be started (by other staff if necessary), which will pre-populate with information from the last timeliness document of the same type, in the same RU, for the same client. The challenge here is keeping track of which clients still need complete information.

Services							154 Results
Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure
712791	10087955	TEST, GANDALF	01QIM0 - CURA 3.1 RES F...	12/2/2022	Draft	Portal Follow ...	
712818	10087955	TEST, GANDALF	01QIM0 - CURA 3.1 RES F...	12/2/2022	Finalized	Walk-Ins or C...	
713207	10087955	TEST, GANDALF	01QIM0 - CURA 3.1 RES F...	12/2/2022	Finalized	Portal Follow ...	

Subsequent tracker started (pre-populates) after initial tracker finalized,

- b. **Documents may be held as Draft or Pending** until completely filled out. In this workflow, the same author would be required to update and finalize the document over time. The challenge here is if the author of the document leaves without forwarding it to another author.

They could assign it to another author using the Staff Corral feature to add information later.

- First build your staff corral.

Enter New Service:

Type of Service: Individual
Primary Clinician: PETERSON CAMILLE
Client: Enter Client Name or ID or leave blank
Note Template: Progress Note Single Service CalAIM 22-07
Start Indiv Service

[Edit Primary Clinician List](#)

Build the list of staff in your staff corral to whom you can assign a note

- Then use the staff corral list to choose another subsequent author.

Billing time

Primary Clinician: 62823 - Peterson, Camille
Provider: 999CGR - CLINICIAN GATEWAY TEST SUD RES

Change the Primary Clinician to a staff in your staff corral to send the document to them

11. Writing a note when client is not registered

- a. When starting the service, leave the Client field blank before clicking “Start Document”.

Enter New Service:

Type of Service: Document
Primary Clinician: MADRID MATT
Client: Enter Client Name or ID or leave blank
Note Template: Timeliness Tracking - Portal Follow up
Start Document

Leave the Client field blank when client is not registered.

- b. On the Document Edit Screen, type in the unregistered client’s Last and First Name. Proceed with filling out the Document.

Service #: New Title: Timeliness Tracking - Portal Follow up

Document date: 12/05/2022

Client: Unknown
Last Name: test
First Name: testerson

Type in the unregistered client's Last and First name.

- c. At a point when the client becomes registered, click on the “...” button to search for and add the client to the note.

When the client becomes registered, use the "..."
button to search for the client. After selecting the client,
the Number field will populate with the Client ID.

Service #: New Title: Timeliness Tracking - Portal Follow up

Document date: 12/05/2022

Number	Last Name	First Name	
Client: 10087864	TEST	TESTERSON	X ...

- d. If it is time to complete the note and the client remains unregistered, you can archive the note to remove it from your Pending Services list; it will remain in the system as a draft and can be accessed via a services search or by going to your Staff page.

When viewing the form, click on the Archive button
to remove the document from the Pending
Services list. It will remain in the system for future
use.

Default Summary	Custom Summary	Print	Spell Check	Delete Service	Edit Service	Archive	Approve Addendum
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