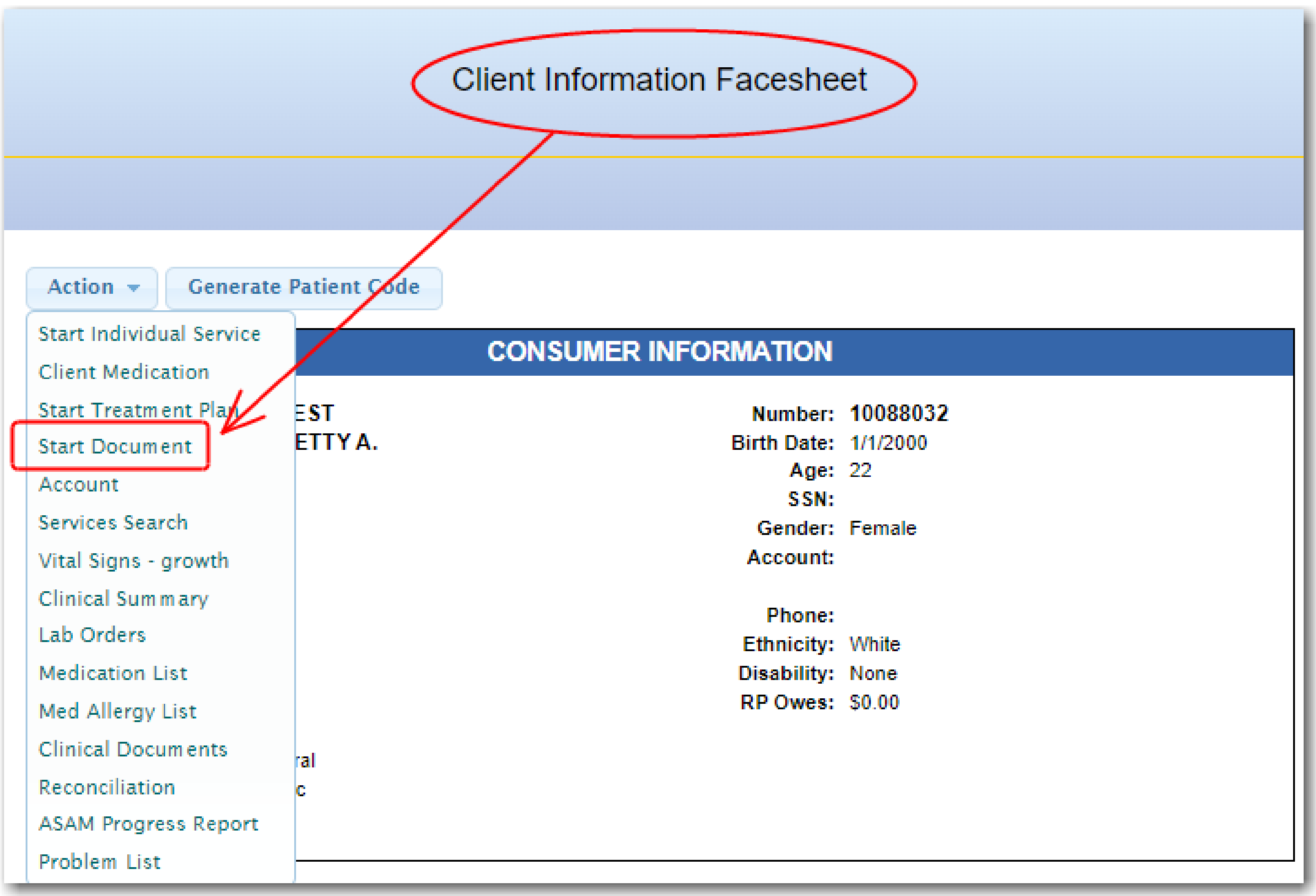
Timeliness Tracking Documents (Portal Follow-up, or Walk-ins/Calls)

Clinicians Gateway SUD 2022-11-23

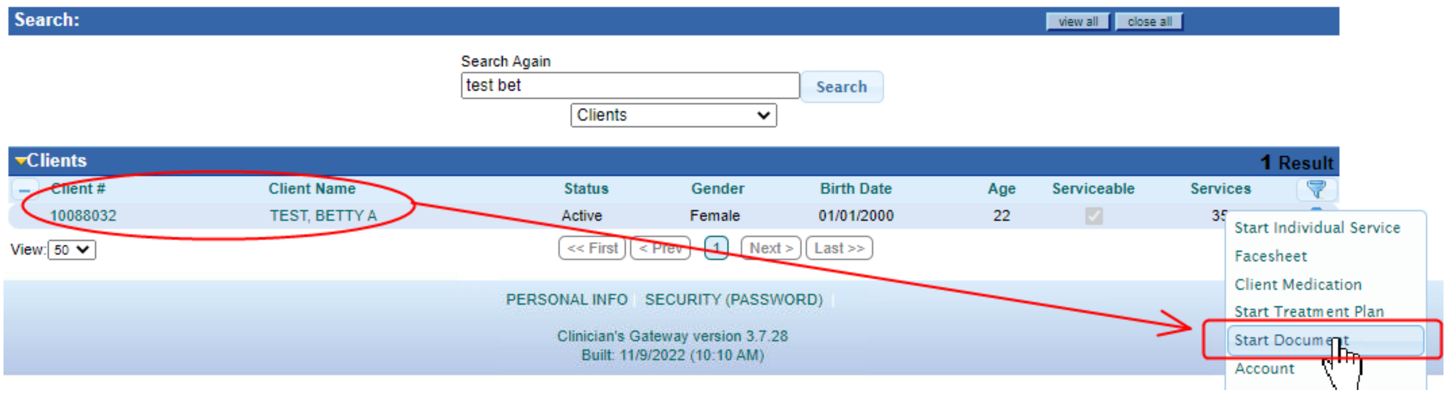
The Timeliness Tracking templates in Clinicians Gateway are designed to collect timely access data from date of first contact through first treatment or a reason for closure if treatment is not reached. The templates are in the document format, which does not use procedure codes or service duration.

1. **<u>Start the Document.</u>** 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 **<u>Document</u>** rather than an Individual Type of Service.

<u>From Client Facesheet, choose "Start Document"</u>



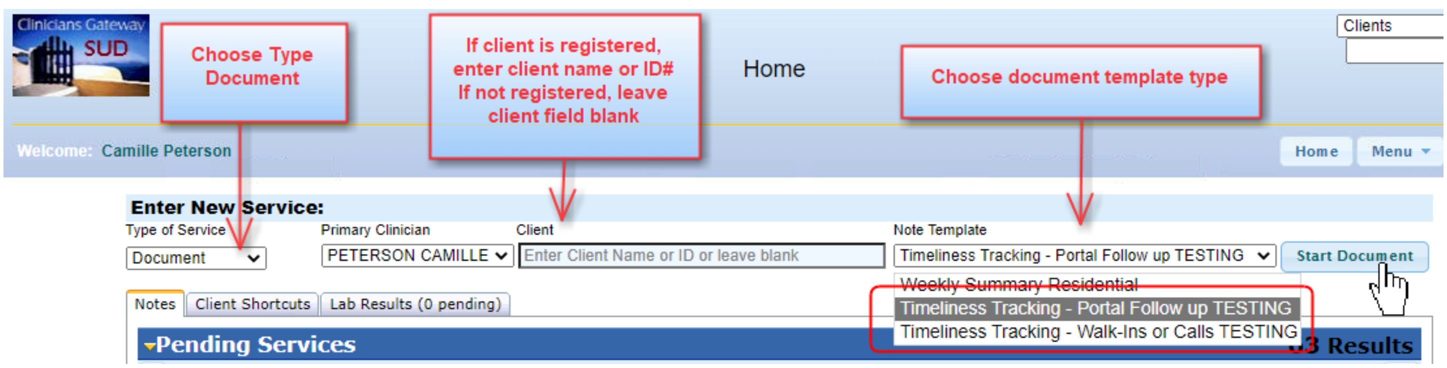
From Client Search. Choose "Start Document"



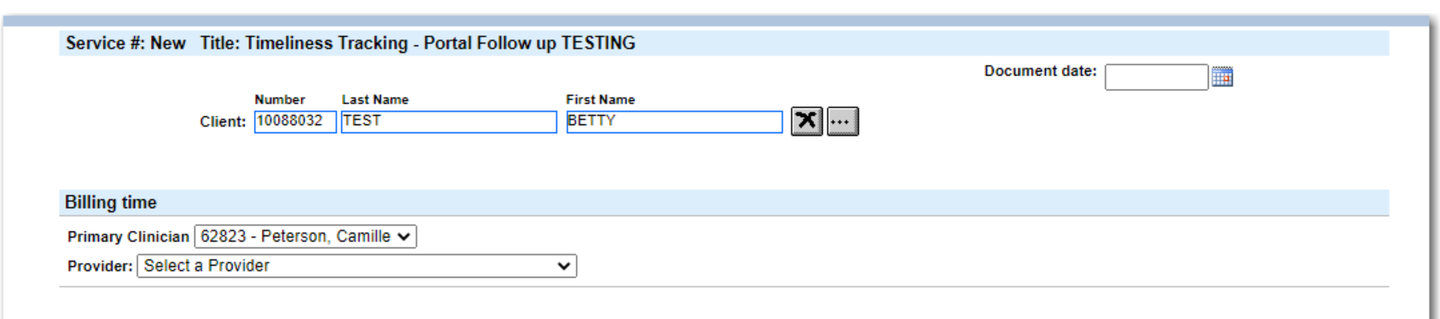
From the Home page choose the Type of Service "Document", Client, Template Type and Start

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

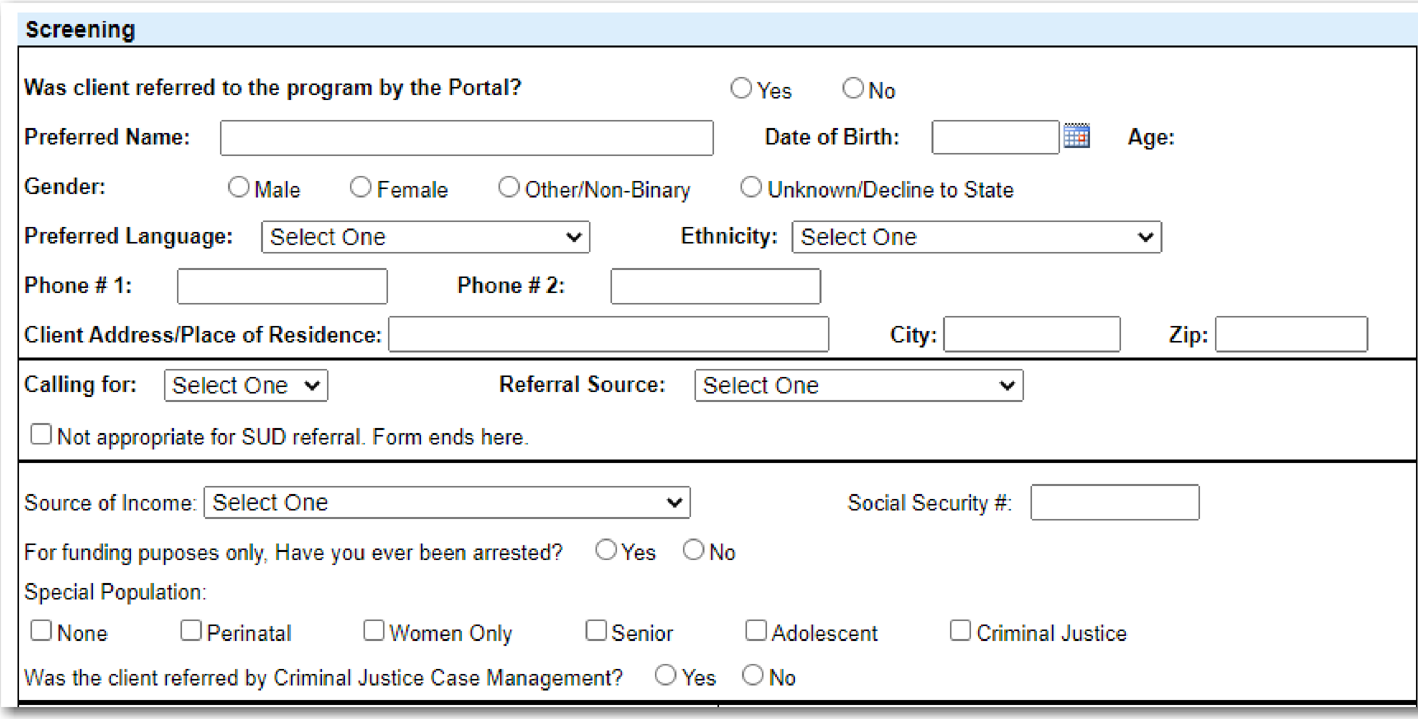
For Template: choose whether client contact was a referral Portal Follow-up or a direct contact Walk-in/Call.



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



3. **<u>Fill in the Screening Section</u>**



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: 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.

Source of Income: Select One Social Security #: [ ]

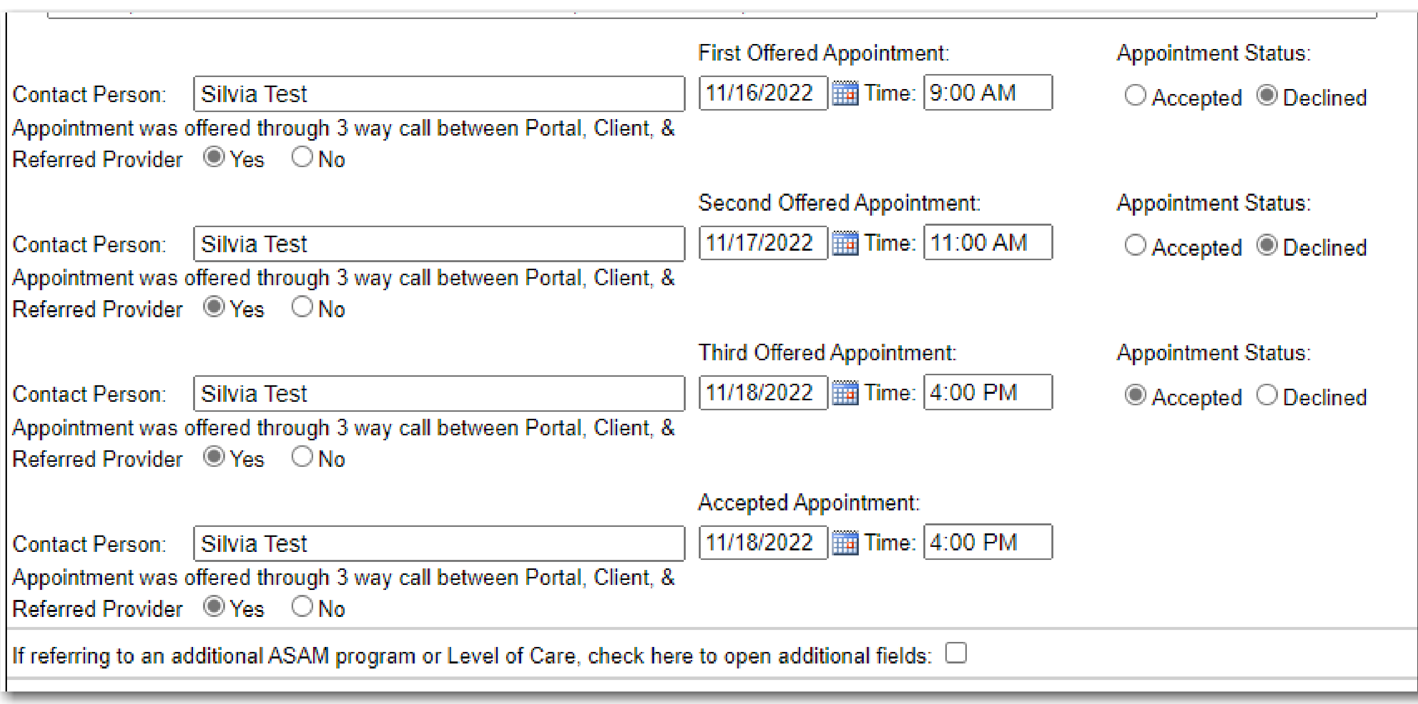
For funding puposes only, Have you ever been arrested? ○ Yes ○ No

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**, **<u>record the Offered Appointments</u>.** The Accepted Appointment will pre-populate from the last appointment marked as "Accepted".



Contact Person: Silvia Test

Appointment was offered through 3 way call between Portal, Client, & Referred Provider ◉ Yes ○ No

First Offered Appointment: 11/16/2022 Time: 9:00 AM

Appointment Status: ○ Accepted ◉ Declined

Contact Person: Silvia Test

Appointment was offered through 3 way call between Portal, Client, & Referred Provider ◉ Yes ○ No

Second Offered Appointment: 11/17/2022 Time: 11:00 AM

Appointment Status: ○ Accepted ◉ Declined

Contact Person: Silvia Test

Appointment was offered through 3 way call between Portal, Client, & Referred Provider ◉ Yes ○ No

Third Offered Appointment: 11/18/2022 Time: 4:00 PM

Appointment Status: ◉ Accepted ○ Declined

Contact Person: Silvia Test

Appointment was offered through 3 way call between Portal, Client, & Referred Provider ◉ Yes ○ No

Accepted Appointment: 11/18/2022 Time: 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: A001M0	Level of Care: 3.1 Clinically Managed Low
Intake Appointment Date: 11/19/2022	Intake Appointment Time: 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

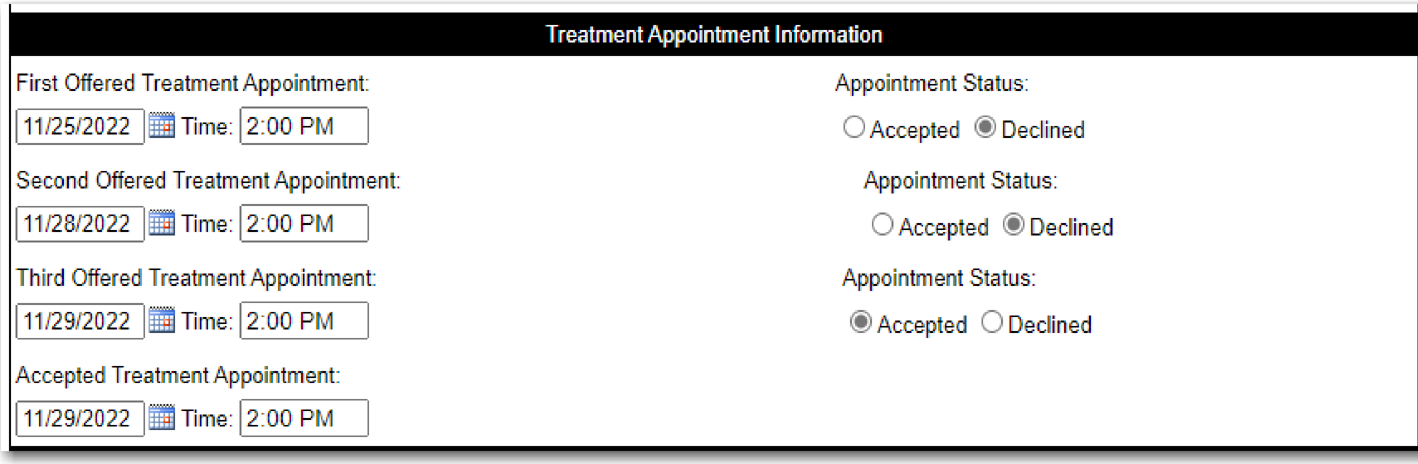
First NEW Offered Appointment: Time:

NEW Appointment Status: ○ Accepted ○ Declined

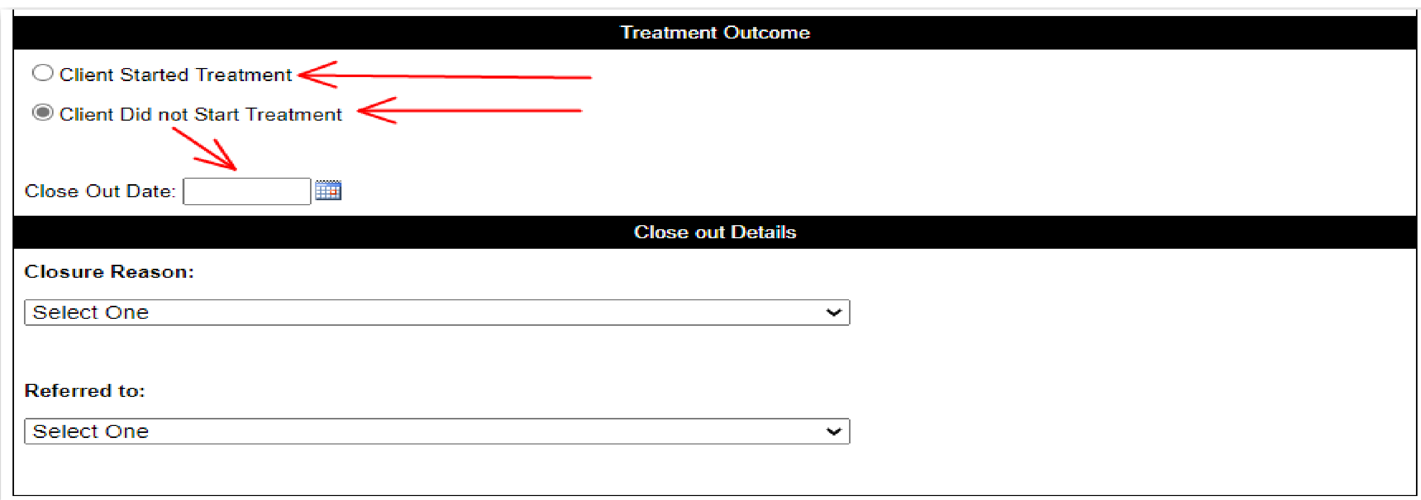
Accepted Appointment: Time:

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.

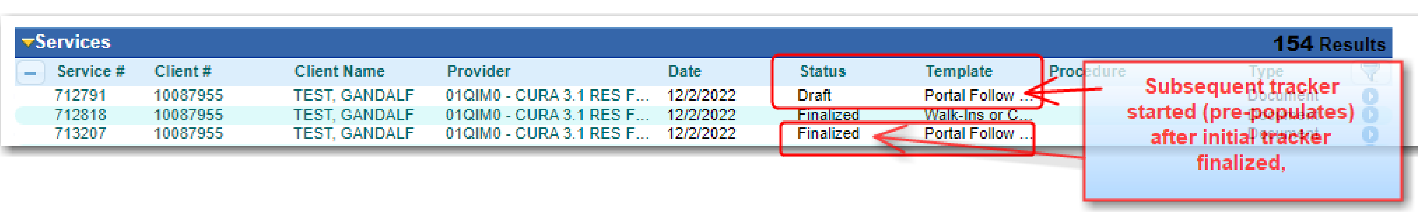


9. **<u>Indicate whether the client started treatment or not.</u>**
    a. If the client did not attend their intake/assessment appointment, answer Did not Start Treatment
    b. If the client did not attend their initial treatment appointment, answer Did not Start Treatment
    c. If they did not start treatment, enter Close Out Date, Closure Reason, and any referrals made.



10. **<u>WORKFLOW: Two Possible Workflows</u>**

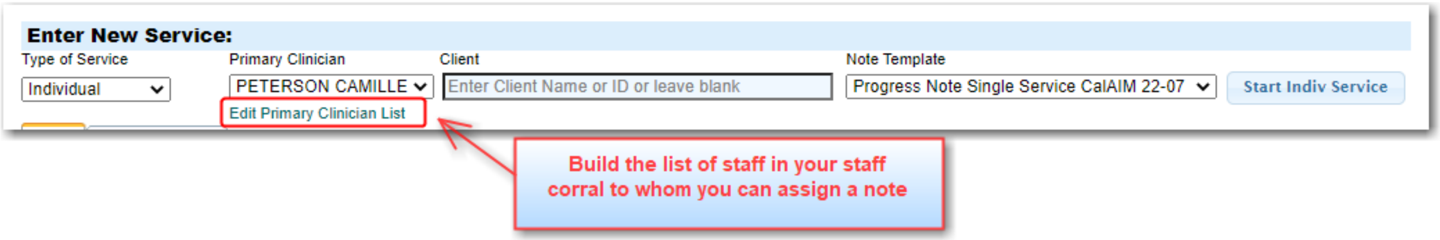
    a. **<u>Multiple Timeliness documents over time:</u>** The document can be finalized with incomplete information. Then as more information is known, another document can be started (by other staff if necessary), which will pre-populate with information from the last timeliness document of the same type,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



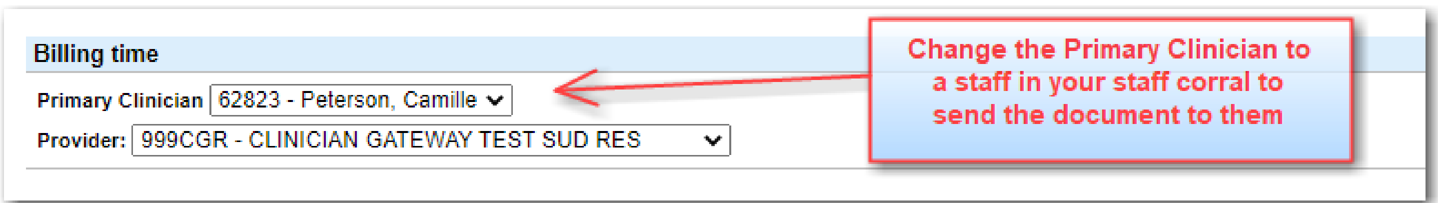
b. **<u>Documents may be held as Draft or Pending</u>** until completely filled out. In this workflow, the same author would be required to update and finalize the document over time. The challenge here is if the author of the document leaves without forwarding it to another author.

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

- First build your staff corral.

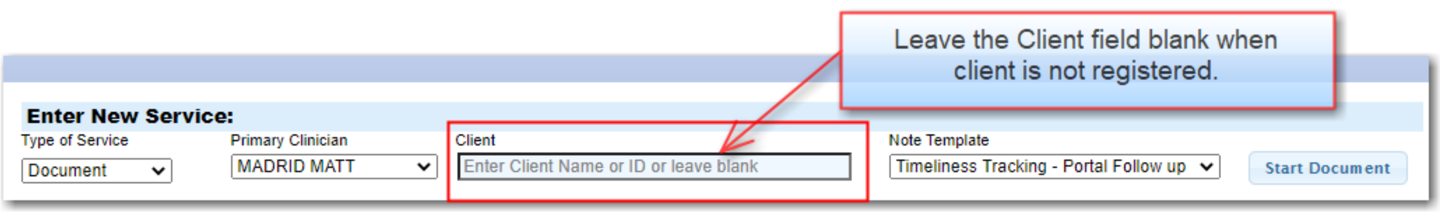


- Then use the staff corral list to choose another subsequent author.

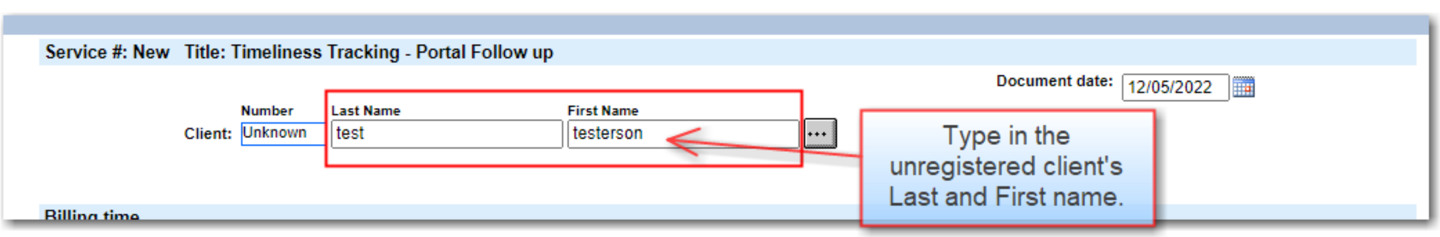


11. <u>Writing a note when client is not registered</u>

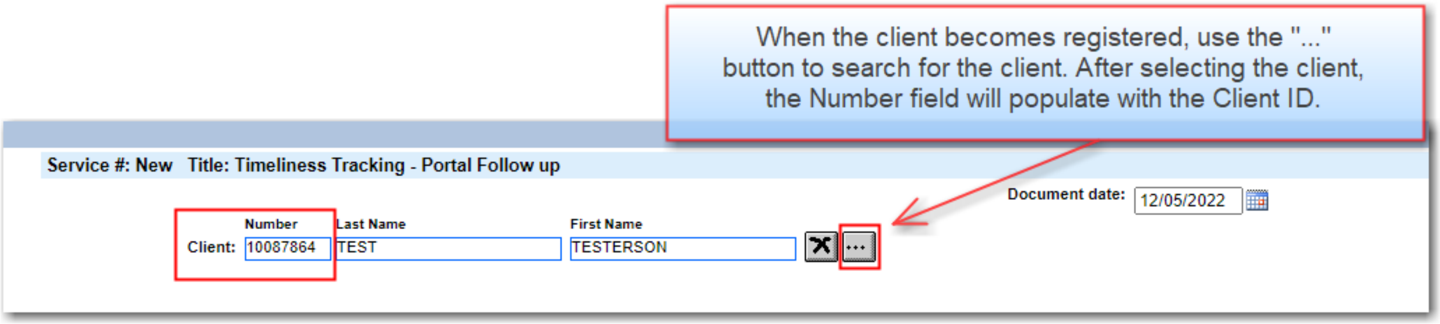
a. When starting the service, leave the Client field blank before clicking "Start Document".



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



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



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.