

Using the New Client Form

The screenshot displays the 'Enter New Client CSI Timeliness Data' form. The form is titled 'Enter Timeliness Data' and 'Enter New Client CSI Timeliness Data'. It contains several sections with numbered callouts:

- 1**: A 'Submit' button is located on the left side of the form.
- 2**: The 'Contact Type' section includes radio buttons for 'Phone Call', 'Walk In', and 'Referral'. The 'Incoming Referral Source' is a dropdown menu.
- 3**: The 'Appointment Type' section includes radio buttons for 'Triage', 'Assessment', 'Treatment', and 'Psychiatry'.
- 4**: The 'Urgent?' section includes radio buttons for 'Yes' and 'No'. The 'Days To Search' is a text input field with the value '10'. The 'Site Selection' is a dropdown menu.
- 5**: The 'Assessment Appt Search' is a dropdown menu.
- 6**: The 'First Appointment Date Offered', 'Second Appointment Date Offered', and 'Third Appointment Date Offered' are date input fields.
- 7**: The 'Appointment Accepted Date' is a date input field. The 'Staff for Appointment' is a text input field with a search icon.
- 8**: The 'Outgoing Referral Source' is a dropdown menu. The 'Other Referral Description' is a text input field.
- 9**: The 'Closure Reason' is a dropdown menu. The 'Closure Date' is a date input field.

A red warning icon 'A' is located near the 'Override Automation?' section, which includes the text 'Turn OFF automaticAppointment Searching in this Form)' and a 'Yes' checkbox.

The form also includes a 'Closure Note' text area and a 'Note Text' text area at the bottom.

1: Contact Type

1 Enter New Client CSI Timeliness Data

Contact Type: Phone Call Walk In Referral

Program Type: MHS

Request Date: 06/21/2019

Incoming Referral Source: [Dropdown]

Appointment Type: Triage Assessment Treatment Psychiatry

Call Time: 11:17 AM

- Phone Call- client calls
- Walk In – client walks in
- Referral- clinician following up on referral

Request Date and Call Time

- this defines “Request for Services date”
- Date of call or walk- in or date of client contact from referral follow up

2: Incoming Referral Source

Incoming Referral Source: [Dropdown]

- Crisis Services
- ER
- Faith Based Org
- Family Member
- Fed Qualified Health Center
- Fee-For-Service Provider
- Friend / Neighbor
- Homeless Services
- Form)

- Who referred the client?
 - Crisis Services examples: Mobile Crisis, Police Officer, MHU
 - ER examples: CHOMP, NMC

3: Appointment Type

- Triage, Assessment, Treatment, Psychiatry
 - Triage: conducting a Triage only and referring to another agency for assessment or closing due to no medical necessity for specialty mental health services
 - Assessment: offering client a psychosocial assessment
 - Treatment: offering client outpatient treatment including therapy, case management if client was recently assessed
 - **For client's discharging from ER Crisis with Assessment only: ACCESS follow up psychosocial assessment is “first treatment” if assessment record was started in ER**
 - Psychiatry: only used if a client refuses to accept assessment

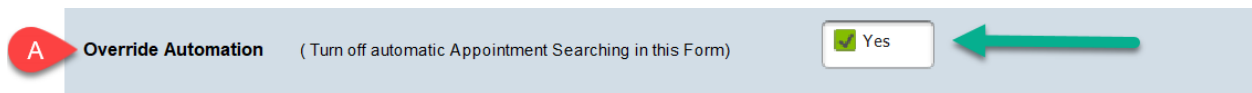
4: Urgent?

- Yes or no
- This is defined by the client
 - Yes- offer appointment within 5 days
 - No- offer appointment within 10 days

Searching for Appointments

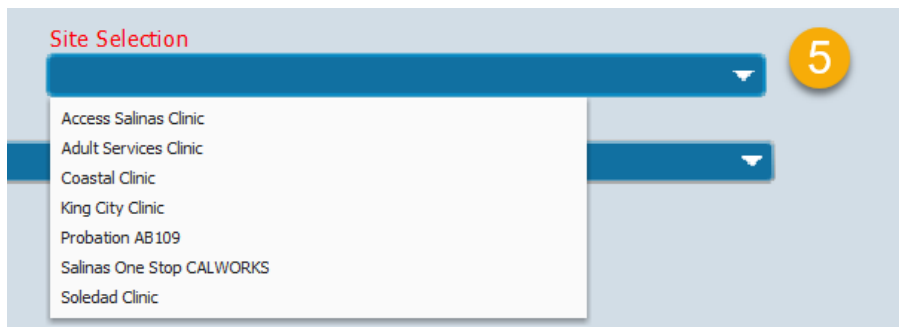
The New Client Form can help automatically search for available appointments within AVATAR for clinicians who populate their scheduling calendars with available assessment and treatment dates.

You may opt- out of this automated search by clicking “Yes” in the Override Automation section.

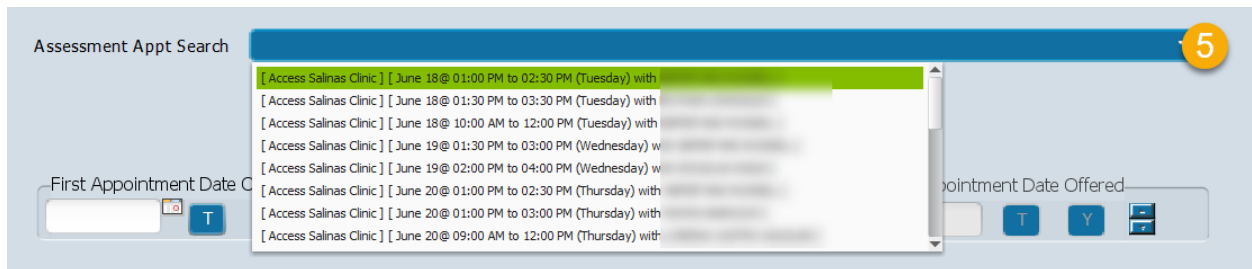


If you choose to use the automatic search, please reference step 5, otherwise, skip to step 6.

5: Site Selection and Assessment Appointment Search



- select assessment location



- Available assessment times will populate in search

6: Appointment Offered and Appointment Details

6

First Appointment Date Offered

Second Appointment Date Offered

Third Appointment Date Offered

Appointment Details

Appointment Accepted Date

Staff for Appointment

- First Appointment Date Offered (must be within the 5/10 day window)
 - First appointment date for assessment/treatment
 - **For ED Crisis only:** first appointment offered is the date of assessment in the ER
- Second Appointment Offered
 - Use only if first offer is not accepted
- Third Appointment Offered
 - Use only if second appointment offered is not accepted

6 Appointment Details

[Access Salinas Clinic] [June 17@ 01:30 PM to 03:00 PM (Monday) with

- The appointment details drop down will display the next available appointment based on the last date offered

7: Appointment Accepted Date and Staff for Appointment

- Date client accepts the appointment
- **For ED Crisis only:** Accepted Appointment is the date of the evaluation in the ER

8: Outgoing Referral and Other Referral Description, Closure Reason, Closure Date, Closure Note and Notes

Outgoing Referral Source: [Dropdown menu]

Other Referral Description: [Text field]

Closure Reason: [Dropdown menu]

Closure Date: [Date field with T, Y, and calendar icons]

Closure Note: [Text area]

Note Text: [Text area]

Outgoing Referral Source: [Dropdown menu]

- Fee-For-Service Provider
- Managed Care Plan
- No Referral
- Other (Specify)

Other Referral Description: [Text field]

Closure Date: [Date field with T, Y, and calendar icons]

- Outgoing Referral Sources include:
 - Fee- For-Service Provider
 - Managed Care Plan
 - CCAH
 - No Referral: no referral was made
 - Other (specify) : specify other referral in “Other referral description”:
 - CHS
 - USC
 - Beacon
 - SUD Program (Valley Health Associates, CHS-SUD, Sun Street Centers, Door To Hope- SUD)
 - Other (describe other referral by Agency Name)

Closure Reason

Does Not meet Medical Necessity

Accepts Assess Date, Miss Appt

Accepts Treatment, Misses Appt

Attended Treatment Appt

Attends Assess Appt, but Not Complete

Completes Assessment, Refused Treatment

Does Not meet Medical Necessity

Closure Date

T Y

←

- List of reasons the assessment/treatment CSI record was closed, complete corresponding Closure Date. Closure Reasons include:
 - Accepts assessment date, misses appointment
 - Accepts Treatment, misses appointment
 - Attended Treatment Appointment
 - Attends Assessment Appointment, but does not complete
 - Completes assessment, refuses treatment
 - Does not meet medical necessity criteria (for specialty mental health services)
- Closure Note includes additional explanation as needed.