Clinical Workflow

Mental Health

Scan the QR code to access the training website:

* Update the client's information in the Client Information screen, including adding important contacts.

	Thing You Want to Do	What is it Called?	Pro Tip
1	Look Up Client to See if They Are in the System Yet	Inquiries (My Office)	Worth reading the directions the first time; remember you will need to search by name, DOB and SSN before you can create a new client in the system.
2	Admit Client to Your Program	Client Programs (Client)	Click this to add a new program.
3	Screen Client	Adult Medi-Cal Screening Tool (Client) Youth Medi-Cal Screening Tool (Client)	Screening score is auto-calculated. To make referral to MCP go to "Client Information: External Referrals."
4	Complete Consents	Coordinated Care Consent (Client) Consent for Email Communication (Client) Consent for Telehealth (Client) Consent for Text Communication (Client) Consent to Treat (Client)	Coordinated care consent allows for sharing of information between all programs, including 42CFR Part 2 programs. Consent to Treat includes acknowledgment of receipt of informational materials.
5	Conduct Assessment	Mental Status Exam (Client) CalAIM Assessment (Client)	When you are done with the assessment, update the problem list at the bottom of the assessment.
6	Establish Diagnosis	Diagnosis Document (Client)	Star your favorites.
7	Complete Required State Forms	CSI Standalone Assessment (Client) CSI Standalone Collection (Client) California CANS (Client) California Pediatric Symptom Checklist (Client)	The CANS is only required for children (up to 20 years old). PSC is only required for children under 18 years old.
8	Schedule Client Services	Staff Calendar (My Office)	You can use appointment search (My Office) to search for appointments within a program.
9	Write a Note	New Service Note	Document any new needs identified in the problem list and check each of the problems addressed during the service.
10	Discharge	Client Programs (Client) CSI Update/Discharge (Client)	Change status to discharged and add a discharged date. Your last progress note in the program will be your discharge summary.