EHR Intake Flow

Request

START SERVICES (NEW CLIENT)
- Done in **Inquiry** screen
- Verify Medi-Cal **(Inquiry: Insurance tab)**
- Basic Demographics (client identifiers) **(Inquiry: Demographics tab)**
- Create a client ID **(Link/Create Client button)**
- Includes referring agency information if applicable

Person is a Walk-In

COMPLETE SCREENING TOOL
- Enroll the client in an Access Program **(Client Programs > New > Program Assignment Details)**
- Required DHCS screenings **(Adult Medi-Cal Screening Tool; Youth Medi-Cal Screening Tool; BQuIP—Brief Questionnaire for Initial Placement)**
- Determines which system of care the client will be served by

REQUEST ENROLLMENT IN THE PROGRAM THAT WILL DO THE ASSESSMENT
- Status in program enrollment is marked as "requested" **(Client Programs > New > Program Assignment Details)**
- **IF the program you're requesting schedules their own assessment appointments (assigns assessment clinicians manually),** create a "To-Do" for program manager to assign primary program staff to program **(Client Flags)**. If scheduler can do this on their own, go skip this step and move to next.

CLIENT ATTENDS APPOINTMENT: COMPLETE INTAKE
- Enroll the client in the assessing program **(Client Programs > Program Assignment Details)**
- Complete intake packets **(links on Client Dashboard: Client Tracking widget)**
- Complete legal forms/consents
- Complete full demographic data set, including Contacts, Aliases, PCP, etc.
- Complete CSI Demographics, CalOMS, etc.

SCHEDULE AN ASSESSMENT APPOINTMENT
- Schedule an assessment appointment with the Requested program **(Appointment Search > Service Details)**
- If the client refuses any offered appointments, make sure to document this in the Appointment Search screen.

BILLING GETS FULL INSURANCE INFORMATION IF NECESSARY (COVERAGE)

COMPLETE CLINICAL ASSESSMENT (CALAIM ASSESSMENT; CA ASAM)
- Determines what services client will receive
- Document any services done during clinical assessment process **(Service Note)**

COMPLETE DIAGNOSIS
- Done in **Diagnosis document**
- May need to do a preliminary diagnosis if assessment takes longer than 1 session

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REFER TO MCP
- Complete **NOABD**
- Document referral **(Client Information: External Referral tab)**

PROVIDE SERVICES
- Complete **Service Notes**
- If needed, request enrollment in additional programs **(Client Programs > New > Program Assignment Details)**. NOTE: you will only be able to add programs you are associated with. For those you're not, an Admin will have to do it for you.

CLOSE REQUEST (NO SERVICES NECESSARY)
- Complete **NOABD**
- Document any referrals given (e.g. Housing, Social Services, Food Bank, etc.) **(Client Information: External Referral tab)**
- Close to the assessment program **(Client Programs > Program Assignment Details)**

CalMHSA