EHR Intake Flow

CalMHSA

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

NOTE: In some instances, requests for SMHS do not require completion of the Screening Tool for Medi-Cal Mental Health Services. Be sure to understand when a screening is and is not required, as outlined in DHCS BHIN 25-020. When not required, you may move to "Request Enrollment in the Program That Will Conduct the Assessment".

COMPLETE SCREENING TOOL

- Enroll the client in an Access Program **(Client Programs > New > Program Assignment Details) OR use Disposition section of Inquiry:** select Disposition, enter the Access Program with today's date.
- Request for MH services: use required DHCS screenings: **(Adult Medi-Cal Screening Tool & Youth Medi-Cal Screening Tool)**
  Result determines the system of care that will conduct the initial assessment
- Request for SUD services: use **Brief Questionnaire for Initial Placement (BQuIP)**

REFER TO MCP FOR ASSESSMENT

- Document referral **(Client Information: External Referral tab)**
- Provide Screening Tool with the referral

CLOSE OUT REFERRAL

- Ensure timely MCP appointment occurs
- Document follow up to ensure referral is closed **(Client Information: External Referral tab)**

REQUEST ENROLLMENT IN THE PROGRAM THAT WILL CONDUCT THE ASSESSMENT

- **Use Disposition section of Inquiry**: select the disposition, then select the program that will conduct the assessment and enter today's date.
- If the program you're referring to allows you to schedule appointments for them, move onto the next step. Otherwise, send a message to the program manager to alert them of the referral so that they can schedule the initial appointment.
- Discharge the client from the Access program **(Client Programs > Program Assignment Details)**

SCHEDULE AN ASSESSMENT APPOINTMENT

- Schedule an assessment appointment with the Requested program **(Appointment Search > Service Note)**
- Create a Timelines Record for this request. Choose the document based on the type of service requested:
  - **DMC-ODS Outpatient Timeliness Record**
  - **DMC-ODS Opioid Timeliness Record**
  - **DMC-State Plan Outpatient Timeliness Record**
  - **DMC-State Plan Opioid Timeliness Record**
  - **MH Non-Psychiatric Timeliness Record**
  - **MH Psychiatric Timeliness Record**

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.
- Enter client's insurance information **(Client Coverage)**

COMPLETE CLINICAL ASSESSMENT (CALAIM ASSESSMENT; CA ASAM)

- Determines if the client meets access criteria for the requested service
- Determines what services the client will receive
- Document any services done during clinical assessment process **(Service Note)**
- Document the diagnosis **(Diagnosis Document)**

REFER TO MCP

- Complete **NOABD Delivery System**
- Document referral **(Client Information: External Referral tab)**
- Complete the **Transition of Care** tool.
- Discharge from the program that completed the assessment **(Client Programs > Program Assignment Details)**
- Complete the Timelines Record

PROVIDE SERVICES

- Complete **Service Notes**
- If needed, request enrollment in additional programs using the disposition section **(Service Note: Disposition tab)**
- Complete Timeliness Record

Updated 11/13/2025