## **SWITS User Manual**

This document focuses on the elements required to record client consent, referral and wait list information.

Total Pages: 14

California December 2005

# Consent, Referral and Wait List

Consent Creating a Referral Accepting a Referral Waitlist

### Consent

- 1. Entry Steps: Client Profile, Intake
- 2. Consents are required before sharing any information about a client with anyone outside the agency. In this system, you need to setup an independent consent with each agency with whom you are going to share information.
- Go to Client List and select the Activity List for the desired client. Select Consent from the menu.
- 4. Review Existing Consents: There may be several consents already on record. Review any existing consents to see if they will suffice. Ensure they have not been revoked. If it has been revoked, it will be noted in Status.
- 5. Once you have determined that you need to create a new consent, use the <u>Add New Client</u> <u>Consent Record</u> hyperlink.

CalWITS	User: Kelly2, Loc: Westat Client: Jetso	Maureen Testing Agency, Westat Outpatient Facility n, Jane   Case #: 1		nt Report Print Mex	, Help <u>Logout</u>		
Home Page	Client Cor	nsent List		Add New Client Consent Record			
Agency >	Start Date	Disclosed To	<u>Status</u>	Signed?	Actions		
Client List 👻	7/7/2004	FEI - Development Agency	Revoked	Yes	Review		
Client Profile 🕨	8/3/2004	Administrative Agency	Active	Yes	Review		
Non-Episode Contact	12/7/2004	FEI - Dev Child Agency	Active	No	Review		
Activity List 👻	12/9/2004	Renee Test	Active	Yes	Review		
Intake	12/9/2004	Renee Test	Active	Yes	Review		
Wait List	2/3/2005	Reports_Triggerpoint	Active	Yes	Review		
T× Team	2/3/2005	test	Active	No	Review		
Screening +	4/1/2005	Starbucks	Revoked	Yes	Review		
Treatment + Outcomes + Discharge + [Consent] Referrals Episode List System Administration +							
My Settings + Reports							

### Consent

- 6. Entities with Disclosure Agreements: This is a drop down list of the Agencies for which an Agency Disclosure Agreement has been created. If you select an agency from this list it will pre-fill the Disclosed to Agency and the bodies of consented data in the Disclosure Selections. The client may disallow access to any body of data by de-selecting the item.
- 7. Disclosed to Agency: Select the Agency you intend to send client information. You may only select one at a time. You will have to create another consent if you wish to send information to a second agency.
- 8. If the agency you are disclosing information to is another provider that uses SWITS, they will be able to see this client's record as soon as you complete and save the consent record.
- 9. If it becomes necessary to share information with entities which are not listed in the drop down box, you may select the "Not System Agency" and type in the name of the individual or agency in the **Disclosed to Entity** box.
- **10. Consent Date**: The consent date defaults to the current date. If the consent has been granted earlier, and is on file, SWITS allows you to change the date in this field.



Note: This date will drive reports which show how long clients are on waitlists for various programs, so be careful if changing the date.

### Consent

- 11. Has the Client Signed the Paper Agreement Form? : The client may have given verbal permission, but has not yet signed the form. Indicate whether or not a signed paper record of the consent is on file. You may not transfer any data until the paper form has been signed and recorded.
- 12. Generate Consent Form: To obtain a signature, you may use the Print Report icon in the icon bar. It will generate a PDF form which may be printed for signature. After obtaining the signature, you may select Yes for Signed?.

🚰 Client Disclosure Ag	reement - Microsoft Internet Explorer 📃 🗖 🔯
CalWITS	Jser: Kelly2, Maureen Joc: Westat Testing Agency, Westat Outpatient Facility Dienty Detson, Jame J Case #1 Print Wee Help Lazas
Home Page	Client Disclosure Agreement <u>Create Referral Using this Disclosure Agreement</u>
Agency >	Note: Consented information may not be redisclosed.
Client List 👻	Client Hame: Jetson, Jane
Client Profile 🕨	Client ID: F11905303467100 Disclosed From Agency Westst Testing Agency
Non-Episode Contact	Entities with Disclosure
Activity List 👻	Agreements
Intake	Disclosed To Agency Non System Agency
Wait List	Disclosed To Entity
Tx Team	(Non System Agency)
Screening >	Purpose For Disclosure Testing
Assessments >	Consent Date 5/4/2005
Admission +	Has the client signed the No
Notes 🕨	Client Information Options Consent Expires Upon Disclosure Selection
Treatment >	ATR Interview C Discharge(UD) +Develo
Outcomes .	CASI Scores Al Status Review (UD, +90)
Discharge 🕨	Client Information (Profile) Date Signed(DS) +Days Behavioral Health Assessment (UD, +90)
Consent	DENS ASI Assessment
Referrals	Discharge Crim, lust Cond
Episode List	GPRA Assessment (CJC) Exp
System Administration 🕨	Mental Status Report Description
My Settings 🕨	TAP Assessment
Reports	TCU Drug Screen
	Comments Other Disclosures
	V V
	Cancel Save Finish
CalWI	Consent Printed 05/04/2005

CONFIDENTIALITY OF ALCOHOL AND DRUG ABUSE PATIENT RECORDS The confidentiality of alcohol and drug abuse patient records maintained by this program is protected by Federal late and regulations. Canamaly, the program may not any to a point of the program that a patient attents the program, or ducitize any information instricting a patient are a activity or drug abuse rotatic.

(1) The patient consents in writing: OR (2) The discharge is advest for a could order. OR

(a) The disclosure is incident or accounter, for (3) The disclosure is incident to insistent cover, for a needical entergency or to a qualified personnel for research, audit, or program exclusion, CP.

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Violation of the Federal law and regulations by a program is a crime. Suspected violations may be reported to the United States Attorney in the district where the violation occurs.

Federal law and regulations do not protect any information about asspect child abase or neglect from being reported order state law to appropriate state or local authorities.

(See 42 U.S.C. Sec. 29065-2 for Federal law and 42 CFR Part 2 for Federal regulations.)

Legal Action Center. (1999) Handbook on legal lators for school-based programs (Pestiae). pp. 71, 72, 8 74. New York Author CONSENT FOR BEL FASE OF CONFIDENTIAL INFORMATION

CONSENT FOR RELEASE OF CONFIDENTIAL INFORMAT

I, Jane J Jetson authorize Westet Testing Agency to disclose to Test Agency the following information

Admission. (Until Discharge ,+90 days)

Behavioral Health Assessment (Until Discharge ,+90 days)

AK Status Review (Until Discharge ,+90 days)

Client Screening (Until Discharge ,+90 days) Other Disclosure

The purpose of the disclosure authorized herein is to Testing

) understand that my records are protected under federal regulations governing Confidentiality of Alcohof and Dray Abuse Patient Records, 42 CPR Part 2, and the Health tearman Pontability and Accordibility Alcohof ratio (HPAA), 45 CPR. Pills, 100 A. 104 and central be disclosed refluction my entities consert arises and homese periodical for the regulations. J Alco understand but in my vector No consert at any time except to the enter that action has been balance to existent approximation. J Alco Understand but in my vector bits consert at any time except to the enter that action has been balance to enter the president action present but in consertant applicat actionationals and exclusional action action. J Annu Annu actionation action action action action action action action action balance to enterlate 1 align a consert form, but hell to onlike herein the intervent in the denset features of the denset of the original consert occurrent to enterlate 1 align a consert form, but hell to onlike herein the consert to any balance the intervent file dons and are actionated as a set of the donset action action

Signature of participant	Date	5/4/2005
Signature of witness	Date	

Signature of parent, guardian or authorized representative when required

PROHIBITION ON REDISCLOSURE OF INFORMATION CONCERNING CLIENT IN ALCOHOL OR DRUG ABUSE TREATMENT

This notice accessponder a disciousne of information encounting a click in administration galaxies benefand; much le you with the excessest of actor clicks." The demonstrates have and indicated by an form records potentiated by federed activationality indice (2017 Per 2); Pasterna clicks architely potentiates and activate and potentiates architectual to activate activation of the ministration of the mathematic clicks and the generics in structure in potentias are and the information under a disposed and the prevent administration for the ministration medicate of other information in ROT administration for the parameter. The indiced rules mutch any use of the information to contribute immutigation or preventian synthesis of endugational activation.

Requested By Kelly2, Maureen, Westel Outpatient 1 of 1

Confidential and Proprietary

Criteria: Client Name = Jane Jateon // Agency Name = Westel Testing Agency // Intelse Pacility = Westel Outpatient Pacility // Case Number =

### Consent

- **13. Regulations:** The client must have the option to consent to various bodies of data, without disclosing ALL data.
- 14. Consent Options: An expiration date must be associated with EACH body of data selected for consent. Select the Option in the left hand box, click on the appropriate Expiry Option, and then click on the right pointing arrow to move the selections to the right hand box. (See Basic Elements Training module for more information on how to use this control to make selections.)
  - Discharge- The consent will expire based on the date of discharge + the number of days entered.
  - b. Date Signed- The consent will expire based on the Consent Date + the number of days entered.
  - c. Other Event- The consent will expire based on some specified event. The user must specify the date of expiration.
  - d. Criminal Justice Condition- The consent will expire based on a criminal justice condition. The user must specify the date of expiration.

There are **Description** and **Comments** text boxes at the bottom of this screen that will allow you to be more specific about consent information.



### Consent

**15. De-Selection**: In this example the client has deselected *DENS ASI Lite*. They may also reset the expiration date if desired.



### **Revoking a Consent**

- 16. **Revocation:** A client may revoke a consent prior to its expiration. For the **Consent** you wish to revoke, click the **Review** hyperlink next to the appropriate consent.
- 17. You will see a **Revoke** button at the bottom of the **Client Disclosure Agreement** screen. Click the **Revoke** button.
- 18. The status of the consent will change to **Revoked** in the **Activity List**.
- 19. Revocation is not retro-active. Whatever was already shared between agencies prior to revocation is not subject to non-disclosure.

Client Consent List	Microsoft Inter	net Explorer			
Ca/W/TS User: Kelly2, Maureen Loc: Westat Testing Agency, Westat Outpatient Facility Client: Jetson, Jane   Case #: 1				nt Report Print Mew	, Help <u>Logout</u>
Home Page	Client Cor	nsent List		Add New Clien	t Consent Record
Agency >	Start Date	Disclosed To	Status	Signed?	Actions
Client List 👻	7/7/2004	FEI - Development Agency	Revoked	Yes	Review
Client Profile 🕨	8/3/2004	Administrative Agency	Active	Yes	Review
Non-Episode Contact	12/7/2004	FEI - Dev Child Agency	Active	No	Review
Activity List 👻	12/9/2004	Renee Test	Active	Yes	Review
Intake	12/9/2004	Renee Test	Active	Yes	Review
Wait List	2/3/2005	Reports_Triggerpoint	Active	Yes	Review
Tx Team	2/3/2005	test	Active	No	Review
Screening >	4/1/2005	Starbucks	Revoked	Yes	Review
Assessments +	5/4/2005	Test Agency	Active	No	Review
Admission >					

🕘 Client Disclosure Ag	reement - Microsoft Internet Explorer
CalWITS	User: Kelly2, Maureen Loc: Westat Testing Agency, Westat Outpatient Facility Client: Jestan, Jame J Lase #: 1 Print Report Print New Help Logast
Home Page Agency > Client List - Client Profile > Non-Episode Contact Activity List - Intake Wait List	Client Disclosure Agreement         Create Referral Using this Disclosure Agreement           Note: Consented information may not be redisclosed.         Client Hame: Jetson, Jane           Client Bine: Jetson, Jane         Client Bine: Jetson, Jane           Client Disclosure Agreements         Disclosed From Agency: Westat Testing Agency           Entities with Disclosure Agreements         Disclosed To Agency: Reports_Triggerpoint           Disclosed To Agency: Upper Disclosed To Agency         Disclosed To Agency: Upper Disclosed To Agency
Tx Team Screening → Assessments → Admission → Notes →	(Intel System Agency) Purpose for Disclosure XX Consent Date 2/3/2005 Has the client signed the Yes paper agreement from Client Information Options Consent Expires Upon Disclosure Selection
Treatment  Outcomes  Discharge  (Consent Referrals Episode List	CASI Scores <ul> <li>Discharge(UD)</li> <li>+Days</li> <li>Admission. (UD, +0)</li> <li>Admission. (UD, +0)</li> <li>Admission. (UD, +0)</li> <li>Casi Status Report</li> <li>Totu Drug Screen</li> <li>Date Signed(OS)</li> <li>+Days</li> <li>Alt Status Review (UD, +0)</li> <li>Alt Status Review (UD, +0)</li> <li>Cher Event(OE)</li> <li>Cher Event(OE)</li> <li>Cher Event(OE)</li> <li>Cher Interview (UD, +0)</li> <li>Cher Interview (UD, +0)</li> <li>Cher Interview (UD, +0)</li> <li>Dens Sign Assessment (UD, +0)</li> </ul>
System Administration + My Settings + Reports	Commerts Com

Client Consent List Add New Client Consent Record						
Start Date	Disclosed To	<u>Status</u>	Signed?	Actions		
7/7/2004	FEI - Development Agency	Revoked	Yes	Review		
8/3/2004	Administrative Agency	Active	Yes	Review_		
12/7/2004	FEI - Dev Child Agency	Active	No	Review		
12/9/2004	Renee Test	Active	Yes	Review		
12/9/2004	Renee Test	Active	Yes	Review		
2/3/2005	Reports_Triggerpoint	Revoked	Yes	Review		
2/3/2005	test	Active	No	Review		
4/1/2005	Starbucks	Revoked	Yes	Review		
5/4/2005	Test Agency	Active	No	Review		

### **Consent to Referral**

- 20. Once you have created a signed consent, you may associate the consent with a referral. Use the review button to select the consent agreement.
- 21. The Client Disclosure Agreement screen allows you to create a referral for the client using the <u>Create Referral Using the Disclosure</u> <u>Agreement</u> hyperlink. It will take you to the Client Referral screen, pre-populating many of the fields.

#### See Next Page For Creating A Referral

CalWITS	User: Kelly2, Maureen Loc: Westat Testing Agency, Westat Outpatient Facility Client: Jetson, Jane   Case #: 1		Print Report Print Mew Help	<u>Logout</u>
Home Page	Client Referral for Jetson, Jane			
Agency >	Referred By	Referred To		
Client List 👻	Agency Westat Testing Agency	Signed Consents	Test Agency	~
Client Profile 🕨	Eacility Westat Outpatient Eacility	Agency	Non System Agency	_
Non-Episode Contact	Stoff Mambar Kollu? Mauroon	Agency	Non System Agency	
Activity List 👻	Start wender Reliyz, waureen	Facility		~
Intake	Program	Staff Member		~
Wait List	State Reporting	Program		~
Tx Team	Category	State Reporting		
Screening >	Reason	Category		
Assessments >	If Other	Non-System Agency	Test Agency	
Admission +	In Concert Verification Rom insel?	Non Sustan Madalitu	2 .	
Notes +	is consent vernication Required?	NOT-System Wouldity		×
Treatment >	Is Consent Verified?	Non-System Specifier		~
Outcomes +	Continue This Episode of Care?	Appt Date	Undetermined	
Discharge 🕨	Commonto	Consents Granted		
Consent	Comments	Consent Date:5/4/200	)5	^
Referrals		Disclosure Domains:		
Episode List		Admission. (UD, +90) All Status Review (I	ID +90)	
System Administration +	v	ATR Interview (UD, +	90)	
My Settings 🕨	Referral Status Referral Created/Pending	Behavioral Health As	sessment (UD, +90)	
Reports	Created Date 5/4/2005 3:25 PM	CASI Scores (UD, +9 Client Information (Pro	0) ofile) (UD +90)	~
		Cilent Information (Pro	511e) (00, +30)	<u> </u>

CalWITS	User: Kelly2, Loc: Westat Client: Jetso	Maureen Testing Agency, Westat Outpatient Facility n, Jane   Case #: 1		rint Report Print Mex	"Help <u>Logou</u>
Home Page Client Consent List Add Naw G					nt Consent Record
Agency >	Start Date	Disclosed To	Status	Signed?	Actions
Client List 👻	7/7/2004	FEI - Development Agency	Revoked	Yes	Review
Client Profile 🕨	8/3/2004	Administrative Agency	Active	Yes	Review
Non-Episode Contact	12/7/2004	FEI - Dev Child Agency	Active	No	Review
Activity List 👻	12/9/2004	Renee Test	Active	Yes	Review
Intake	12/9/2004	Renee Test	Active	Yes	Review
Wait List	2/3/2005	Reports_Triggerpoint	Active	Yes	Review
T× Team	2/3/2005	test	Active	No	Review
Screening >	4/1/2005	Starbucks	Revoked	Yes	Review
Assessments +	5/4/2005	Test Agency	Active	No	Review



### Referral

- 22. Entry Steps: Client Profile, Client Intake.
- 23. Go to **Client List** and select the desired client. Go to **Activity List sub-menu** and select **Referrals.**
- 24. Client Referral List: To create a new referral from this screen, click on the hyperlink for <u>Add</u> <u>New Client Referral Record.</u> This will take you to the Client Referral screen.
- 25. Information about your **Agency**, **Facility**, **and Staff Member** will come pre-populated and is read only.
- 26. Referred By Select the Reason for referral, Is Consent Verification Required, Is Consent Verified and Continue this Episode of Care?
  - 1. **Consent Verification Requested?:** This refers to the agreement between your agency and the agency to which you are referring the client. It asks if your agreement requires a paper consent verification.
  - Consent Verified?: This states whether consent was verified or not if necessary due to your agency agreement.
  - 3. Continue this Episode of Care: Select yes/no as appropriate. Please note: an episode of care can only be continued if a referral is to another program within the facility.

Client Referrals List	Micros	oft Internet Explore	91				
CalWITS	User: Loc: Client:	Kelly2, Maureen Westat Testing Agenc <b>Jetson, Jane   Ca</b>	y, Westat Outpatient I I <b>se #: 1</b>		Print Report Prin	nt Mew Help	<u>Logout</u>
Home Page	Clier	nt Referrals List			Add New C	lient Referrals I	<u>Record</u>
Agency >	<u>Name</u>	Referred To Agency	Referred To Facility	Non System Agency	Referred To Modality	Referral Status	Actions
Client List -	Jetson, Jane	FEI - Development Agency	Adult Intensive OP		Interim-Waiting List	Placed/Accepted	<u>Review</u>
Non-Episode Contact	Jetson, Jane	FEI - Development Agency	Mental Health Inpatient		Mental Health Inpatient Treatment	Referral Created/Pending	<u>Review</u>
Activity List ↓ Intake	Jetson, Jane	FEI - Development Agency	Adult Intensive OP		Interim-Waiting List	Referral Created/Pending	<u>Review</u>
Wait List Tx Team	Jetson, Jane			Renee Test		Referral Created/Pending	<u>Review</u>
Screening >	Jetson, Jane	Westat Testing Agency	Adolescent Services		Substance Abuse Outpatient	Referral Created/Pending	<u>Review</u>
Admission +	Jetson, Jane	Reports_Triggerpoint	Healthsouth		Intensive Outpatient	Refused Treatment	<u>Review</u>
Notes <b>›</b> Treatment <b>›</b>	Jetson, Jane	Reports_Triggerpoint	Healthsouth		Short Term Residential	Rejected by Program	<u>Review</u>
Outcomes >	Jetson, Jane	Reports_Triggerpoint	Healthsouth		Mental Health Outpatient Treatment	Referred Terminated	<u>Review</u>
Consent	Jetson, Jane	Reports_Triggerpoint	Healthsouth		Basic Education	Wait List	<u>Review</u>
Episode List System Administration > My Settings > Reports							



Referred To - Select the Signed Consents, 27. Agency and Facility from the drop-down box. If you are referring to a specific staff at that Agency, select the name of the Staff Member from the drop-down box. When selecting an agency from the Signed Consents drop down, it will populate the Consents Granted box.

> Note: A signed Consent is required before sending a referral since you are disclosing the identity of the client through the referral. If no consent exists, you must go back to the consent screen and create one

- Select a Program to which you are referring and 28. State Reporting Category will get populated.
- You may provide Comments. Click Finish when 29. done.
- If you are sending the referral to a SWITS agency, 30. once you complete and Save the Client Referral screen, the facility to which you have referred the client will see the referral appear in their Referrals In screen under Agency> Referrals In. Similarly, referrals sent to you by another using SWITS using agency can be seen in your Referrals In screen.
- 31. You will see referrals you have made in your Referral Out screen.

CalWITS	User: Kelly2, Maureen Loc: Westat Testing Agency, Westat Outpatient Facility Client: Jetson, Jane   Case #: 1	Print Report Print New Help Log
Home Page	Client Referral for Jetson, Jane	
Agency +	Referred By	Referred To
Client List 👻	Agency Westat Testing Agency	Signed Consents Test Agency
Client Profile 🕨	Facility Westat Outpatient Facility	Agency Non System Agency
Non-Episode Contact	Staff Member Kellv2, Maureen	Eacility
Activity List 👻	Drawon Bakit autostient	racinty
Intake	Olda Davadian	Staff Member
Ty Team	Category Adult outpatient	Program
Screeping >	Reason Client declined	State Reporting
Assessments •	lé Célear	Category
Admission >		Non-System Agency
Notes +	Is Consent Verification Required? Yes	Non-System Modality DUI Education
Treatment +	ls Consent Verified? Yes 💉	Non-System Specifier Adult outpatient
Outcomes +	Continue This Episode of Care? No 💙	Appt Date Undetermined
Discharge		Consents Granted
Consent	Comments	Consent Date: 5/4/2005
Referrals		Disclosure Domains:
Episode List		DENS ASI Assessment (UD, +90)
System Administration 🕨	×	ATR Interview (UD, +90)
My Settings 🕨	Referral Status Referral Created/Pending	Behavioral Health Assessment (UD, +90) CASI Scores (UD, +90)
Reports	Created Date 5/4/2005 3:27 PM	Client Information (Profile) (UD, +90)
Referrals - Microsoft I	nternet Explorer	Cancel Save Finis
alWITS	User: Kelly2, Maureen Loc: Westat Testing Agency, Westat Outpatient Facility Client: Jetson, Jane   Case #: 1	Print Report Print View Help
Home Page 🔄	Referrals for Westat Outpatient Facility	Referral Created/Pending 👻
Agency 👻	Hame Referred From Agency Referred From Facility R	eferred To Modality Referral Status Referral Created I
Agency List 👻	Coprad Chinese Testing	ubstance Abuse Referral

Agency Profile 🕨		Rodney	Agency <img/>	FEHVVS	Outpatient	Created/Pending	4/15/2004	Rev
Aliases		Barr, Marsha	Reports_Triggerpoint	Healthsouth	Intensive Out	patient Referral Created/Pending	1/20/2005	Rev
Governance >		Cohen, Seth	Reports_Triggerpoint	Healthsouth	Intensive Out	patient Referral Created/Pending	1/20/2005	Rev
Relationships +		l						
Announcements								
Referrals 👻								
Referrals In								
- · · · ·								
Referrals - Microso	oft	Interne	t Explorer					
CalWITS		User: Loc: Client:	Kelly2, Maureen Westat Testing Agen Jetson, Jane   C	cy, Westat Outpatient ase #: 1		Print Report Pr	int Mew Help	<u>Logout</u>
Home Page	^	Refe	rrals from We	stat Outpatien	t Facility Refer	al Created/Pending 💌		
Agency 👻		<u>Name</u>	Referred To Agency	Referred To Facility	Non System Agend	v Referred To Modality	Referral Status	Referral Cr
Agency List -		Jetson, i Jane	FEI - Development Agency	Mental Health Inpatient		Mental Health Inpatient Treatment	Referral Created/Pending	8/3/2004
Aliases		Jetson, i Jane	FEI - Development Agency	Adult Intensive OP		Interim-Waiting List	Referral Created/Pending	8/12/2004
Governance >		Doe, John					Referral Created/Pending	11/11/2004
Relationships > Announcements		Jetson, Jane			Renee Test		Referral Created/Pending	12/9/2004
Referrals 🗸		Jetson.	Westat Testing			Substance Abuse	Referral	

Test Agency

Adolescent Services

Referrals In

Referrals Out

Jane Agency

Jetson,

Jane

Outpatient

12/21/2004

5/4/2005

Created/Pending

Created/Pending

Referral

### Accepting a Referral

• When another agency has referred a client to your agency, that client will show up in your "Referrals In" listing.

Referrals - Micros	oft	Internet	t Explorer					
CalWITS		User: Loc: Client:	Kelly2, Maureen Westat Testing Agency, V Jetson, Jane   Case	Westat Outpatient Facilit # #: 1		Print Report Pri	nt View Help	
Home Page	^	Refe	rrals for Westat (	Outpatient Facili	V Referral Created/Pe	ending 🔽		
Agency 👻		<u>Name</u>	Referred From Agency	Referred From Facility	Referred To Modality	Referral Status	Referral Crea	ited Date A
Agency List - Agency Profile +		Conrad, Rodney	Chinese Testing Agency <img/>	FEHIVIs	Substance Abuse Outpatient	Referral Created/Pending	4/15/2004	R
Aliases		Barr, Marshall	Reports_Triggerpoint	Healthsouth	Intensive Outpatient	Referral Created/Pending	1/20/2005	R
Governance >		Cohen, Seth	Reports_Triggerpoint	Healthsouth	Intensive Outpatient	Referral Created/Pending	1/20/2005	R
Relationships > Announcements								
Referrals 🗸								

- Before accepting the referral, you should "Review" the referral, which opens the "Client Referral Screen".
  - You can then set the Referral Status to "Placed/Accepted".
  - When you accept a client, the following things happen:
    - 1. The client will be taken off of the referrals In list.
    - 2. If the client does not already exist in your agency, the complete client profile will be copied into your agency from the sending agency.
    - You will be automatically taken to the intake screen to start an "Episode of Care" for the client you are accepting.



### **Consented Clients**

- If a client from another agency has given their consent to allow that agency to share their data with your agency, then that client will appear in your search list under the "Clients with Consents from Outside Agencies" portion of the client search screen.
- Note: That client will only appear during the duration of the consent.
- Clicking on the **Activity List** for that consented client will take you to the following screen which lists only those activities in which your agency has been given access.
- Note: You are seeing the actual records as they appear in the other agency. In the example to the right, the Admission has not been started yet, therefore it's status is "Not Available".

CalWITS	User: Conra Loc: Admin Client:	d, Rodney iistrative Agency, Ad	ministrative Un	it		Print V	) lew			
Home Page Agency ►	Some of th returned.	e clients listed belo	ow have altern	ate names (alia	ses) that m	atched yo	our crite	ria and w	ere theref	
Client List 🔻	Client Se	arch								
Client Profile  Non Enjande Contact	Agency A	dministrative Agency			Facility				*	
Activity List ►	First Name ro	od*			Last Name					
Episode List	SSN				DOB					
System Administration  My Softings	Client ID			Provid	er Client ID					
Reports	Staff			<ul> <li>Primary</li> </ul>	Care Staff					
	Case Status	All Clients		*				Clear Go		
	Client Lis	t <u>(Export)</u>	202							
	CR1070770	Full Name	7/7/1970	212-55-1234	<u>Ge</u> Fer	nder nale	Profile I	S Activity Lis	st	
		o cicon, cuito		212 00 1201			TOTIO	/ tourny ca		
	Clients w	oth Consents	from Outs	ide Agenci	es	0.011		0.1		
	Agency Sonoma Trainin	a Agency South	Client Id CR1070770	Client Name Conrad Rodneys	DOB 7/7/197	<u>SSN</u> 212-55	-1234	Gender Male	Actions	
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### **Consented Clients**

- Clicking on the review link on any of the activities will take you to the record in the consented from agency.
- Note that the record appears in read-only mode. This is because you are only allowed to view, and not edit, records that are consented to you.

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### Wait List

- Entry Steps: Client Profile, Intake.
- To place a client on the **Wait List** you must first have entered the **Client Profile** and **Intake**.
- Select the client from the **Client List**, and click **Activity List**. You will see the **Wait List** option in the menu. Click this to launch the **Client Waiting List** screen.
- To put the client on a wait list for a program click the <u>Put Client on Waiting for Another Program</u> hyperlink. This will bring up the Client Wait List screen.

Client Waiting List -	Microsoft	Internet E	xplo	rer									L	
CalWITS	User: Ke Loc: W Client: J	elly2, Maure estat Testin <b>etson, Jar</b>	ien 1g Age <b>1e  </b>	ency, West Case #:	at Outpatie <mark>1</mark>						t Report	Print Mew	? Help	
Home Page	Client	Waiting	List	t					Put	Clien	t on Wa	ilina for	Another P	rogram
Agency .	Full Name	Program	Staff	Pregnant	Due	Dual Diag	HIV	IV Drugs	Interi	m Ser	Placen	nent Ass	t Start Date	Actions
Client List -	- dir Harrie	Womens	Jun	Trogrand	Dete	Daar Druge		in brugs	intern	11 301	r lacen	ienc Ass	<u>c otare bate</u>	Autono
Client Profile >	Jetson, Jane	SA		Yes	8/14/2005	No	No	No	Yes		No		7/6/2004	Review
Non-Episode Contact		Outpatient							<u> </u>					
Activity List 👻	Jetson, Jane	Adult outpatient		Yes	8/14/2005		No	No					8/11/2004	Review
Intake														
VVait List														
Tx Team														
Screening >														
Assessments >														
Admission +														
Treatment														
Discharge														
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Episode List														
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Home Page	Client	Wait Lis	t fo	r Jetso	n, Jane									
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Client List 👻		Fac	anto v	Nectat Outr	atient Facili	ŧ0								
Client Profile 🕨		Coloret Duran	inty y	vestar outp		(y								
Non-Episode Contact		Select Progr	am					×						
Activity List 👻		Select St	aff				`	~						
Intake VA/ait List		Moda	ality											
Tx Team		Wait Start D	ate <mark>5</mark>	5/4/2005										
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Assessments 🕨	Addec	d to Wait List	By 🛛	Kelly2, Mau	reen		1	*						
Admission 🕨							_							
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											<	Cancel	Save	Finish

### Wait List

- Select Program: The client must be put on the wait list for a specific program. Select the program, and the modality will populate.
- Select Staff: If you want to place the client on the wait list for a specific staff member select that person from the drop down list.
- **Date:** The date will default to the current date, this can be changed as needed.
- Added to Wait List By: This will default to the user logged into the system. It may be changed as needed.
- **Dually diagnosed** (MICA), **Injecting, Pregnant, HIV+.**: Special conditions may affect the facility, program, staff selection and criticality of treatment. Many of these values pre-populate from the Intake screen.
- **Referred to Interim Services:** This will indicate whether interim assistance such as counseling will be provided until the program has an opening.
- Assistance Needed to Place this Client: This will indicate if assistance is needed to place this client in another program.
- If the client gets enrolled in the same program as he/she was waiting for, the system will take them off the wait list. If the client needs to be removed from the wait list for any other reason, go to the Wait List screen and complete the Wait End Date, Removed from Wait List by and Reason fields and provide any additional details in the comments box.

CalWITS	User: Kelly2, Maureen Loc: Westet Testing Agency, Westat Outpatient Facility Client Jetson, Jame   Case #: 1	<b>?</b> Ielp <u>Logo</u>
Home Page Agency > Client List ~ Client Profile > Non-Episode Contact Activity List ~	Client Wait List for Jetson, Jane Agency Westat Testing Agency Facility Westat Outpatient Facility Select Program Select Staff	
VWat List Tx Team Screening + Assessments + Admission + Notes + Treatment + Outcomes + Discharge + Consent Referrals	Woodamy         Wait Start Date         Wait End Date         Added to Wait List By         Kelly2, Maureen         Dually Diagnosed?         Patient is Injecting         No         Referred to Interim Services         Patient is Pregnant         Yes         Due Date         8/14/2005	
Episode List System Administration > My Settings > Reports	Removed From Watt List By Reason Comments Admit Client Cancel  Cancel	ave Finist

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Home Page	Client	Waiting	List	t					Put Clien	t on Wa	iting for /	unother Pr	ogram
Agency >	<u>Full Name</u>	<u>Program</u>	<u>Staff</u>	<u>Pregnant</u>	<u>Due</u>	<u>Dual Diag.</u>	<u>HIV</u>	<u>IV Drugs</u>	<u>Interim Ser</u>	Placem	ent Asst	<u>Start Date</u>	Actions
Client List 👻	Jetson	Womens											
Client Profile >	Jane	SA Outpatient		Yes	8/14/2005	No	No	No	Yes	No		7/6/2004	Review
Activity List -	Jetson, Jane	Adult		Yes	8/14/2005		No	No				8/11/2004	Review
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