

# ***SWITS* User Manual**

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

Total Pages: 14

California  
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## **Consent, Referral and Wait List**

Consent  
Creating a Referral  
Accepting a Referral  
Waitlist

# Consent, Referral and Wait List

## 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.
3. 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 Ensure they have not been revoked. If it has been revoked, it will be noted in **Status**.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 **Add New Client Consent Record** hyperlink.

Start Date	Disclosed To	Status	Signed?	Actions
7/7/2004	FBI - Development Agency	Revoked	Yes	<a href="#">Review</a>
8/3/2004	Administrative Agency	Active	Yes	<a href="#">Review</a>
12/7/2004	FBI - Dev Child Agency	Active	No	<a href="#">Review</a>
12/9/2004	Renee Test	Active	Yes	<a href="#">Review</a>
12/9/2004	Renee Test	Active	Yes	<a href="#">Review</a>
2/3/2005	Reports_Triggerpoint	Active	Yes	<a href="#">Review</a>
2/3/2005	test	Active	No	<a href="#">Review</a>
4/1/2005	Starbucks	Revoked	Yes	<a href="#">Review</a>

# Consent, Referral and Wait List

## Consent

- 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.
- 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.
- 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.
- 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.
- 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.

The screenshot shows the 'Client Disclosure Agreement' form in a Microsoft Internet Explorer browser window. The user is 'Kelly2, Maureen' at the 'Westat Testing Agency, Westat Outpatient Facility' for client 'Jetson, Jane | Case #: 1'. The form includes a navigation menu on the left with options like 'Home Page', 'Agency', 'Client List', 'Client Profile', 'Non-Episode Contact', 'Activity List', 'Intake', 'Wait List', 'Tx Team', 'Screening', 'Assessments', 'Admission', 'Notes', 'Treatment', 'Outcomes', 'Discharge', 'Referrals', 'Episode List', 'System Administration', 'My Settings', and 'Reports'. The main form area contains the following fields and sections:

- Note:** Consented information may not be redisclosed.
- Client Name:** Jetson, Jane
- Client ID:** F1190530J467100
- Disclosed From Agency:** Westat Testing Agency
- Entities with Disclosure Agreements:** (Dropdown menu)
- Disclosed To Agency:** Non System Agency
- Disclosed To Entity (Non System Agency):** (Text field)
- Purpose For Disclosure:** (Text field)
- Consent Date:** 5/4/2005
- Has the client signed the paper agreement form:** No
- Client Information Options:** A list of checkboxes for various services: Admission, AK Status Review, ATR Interview, Behavioral Health Assessment, CASI Scores, Client Information (Profile), Client Screening, DENS ASI Assessment, DENS ASI Lite, Discharge, and GPRA Assessment.
- Consent Expires Upon:** Three options: Discharge(UD) +Days, Date Signed(DS) +Days, and Other Event(OE) Exp. Each has a corresponding text field.
- Disclosure Selection:** A large empty box for selecting specific data to be disclosed.
- Comments:** (Text field)
- Other Disclosures:** (Text field)
- Buttons:** Cancel, Save, and Finish.

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, Referral and Wait List

## Consent

- 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.
- 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?**.

# Consent, Referral and Wait List

## 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.)
  - a. 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.

Client Information Options: Admission, AK Status Review, ATR Interview, Behavioral Health Assessment, CASI Scores, Client Information (Profile), Client Screening, DENS ASI Assessment, DENS ASI Lite, Discharge, GPRA Assessment

Consent Expires Upon:  Discharge(UD) +Days 90,  Date Signed(DS) +Days,  Other Event(OE) Exp,  Crim Just Cond (CJC) Exp

Disclosure Selection: (Empty)

Description: (Empty)

Comments: (Empty)

Other Disclosures: (Empty)

Buttons: Cancel, Save, Finish

Client Information Options: ATR Interview, CASI Scores, Client Screening, DENS ASI Assessment, DENS ASI Lite, Discharge, GPRA Assessment, Intake Transaction, Mental Status Report, TAP Assessment, TCU Drug Screen

Consent Expires Upon:  Discharge(UD) +Days 90,  Date Signed(DS) +Days,  Other Event(OE) Exp,  Crim Just Cond (CJC) Exp

Disclosure Selection: Admission. (UD, +90), AK Status Review (UD, +90), Behavioral Health Assessment (UD, +90), Client Information (Profile) (UD, +90)

Description: (Empty)

Comments: (Empty)

Other Disclosures: (Empty)

Buttons: Cancel, Save, Finish

Client Information Options: ATR Interview, CASI Scores, Client Screening, DENS ASI Assessment, DENS ASI Lite, GPRA Assessment, Intake Transaction, Mental Status Report, TAP Assessment, TCU Drug Screen, TCU Intake Interview

Consent Expires Upon:  Discharge(UD) +Days,  Date Signed(DS) +Days,  Other Event(OE) Exp 5/4/2006,  Crim Just Cond (CJC) Exp

Disclosure Selection: Admission. (UD, +90), AK Status Review (UD, +90), Behavioral Health Assessment (UD, +90), Client Information (Profile) (UD, +90), Discharge (Client's 18th Birthday, 5/4/2006)

Description: Client's 18th Birthday

Comments: (Empty)

Other Disclosures: (Empty)

Buttons: Cancel, Save, Finish

# Consent, Referral and Wait List

## Consent

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

**Client Disclosure Agreement - Microsoft Internet Explorer**

User: Kelly2, Maureen  
Loc: Westat Testing Agency, Westat Outpatient Facility  
Client: **Jetson, Jane** | Case #: 1

Print Report Print View Help Logout

### Client Disclosure Agreement Create Referral Using this Disclosure Agreement

**Note: Consented information may not be redisclosed.**  
Client Name: Jetson, Jane  
Client ID: F1190530J467100

**Disclosed From Agency:** Westat Testing Agency

Entities with Disclosure Agreements: [Dropdown]  
Disclosed To Agency: Non System Agency  
Disclosed To Entity (Non System Agency): Test Agency  
Purpose For Disclosure: Testing

Consent Date: 5/4/2005  
Has the client signed the paper agreement form: No

**Client Information Options**  
Consent Expires Upon:  
Discharge(UD) +Days 90  
Date Signed(DS) +Days [ ]  
Other Event(OE) Exp 5/4/2006  
Crim Just Cond (CJC) Exp [ ]

Description: Client's 18th Birthday

**Disclosure Selection**  
Admission (UD, +90)  
AK Status Review (UD, +90)  
ATR Interview (UD, +90)  
Behavioral Health Assessment (UD, +90)  
CASI Scores (UD, +90)  
Client Information (Profile) (UD, +90)  
Client Screening (UD, +90)  
DENS ASI Assessment (UD, +90)  
DENS ASI Lite (UD, +90) ▲  
Discharge (Client's 18th Birthday, 5/4/2006)  
GPRA Assessment (UD, +90)

Comments: [Text Area] Other Disclosures: [Text Area]

Cancel Save Finish

**Client Disclosure Agreement - Microsoft Internet Explorer**

User: Kelly2, Maureen  
Loc: Westat Testing Agency, Westat Outpatient Facility  
Client: **Jetson, Jane** | Case #: 1

Print Report Print View Help Logout

### Client Disclosure Agreement Create Referral Using this Disclosure Agreement

**Note: Consented information may not be redisclosed.**  
Client Name: Jetson, Jane  
Client ID: F1190530J467100

**Disclosed From Agency:** Westat Testing Agency

Entities with Disclosure Agreements: [Dropdown]  
Disclosed To Agency: Non System Agency  
Disclosed To Entity (Non System Agency): Test Agency  
Purpose For Disclosure: Testing

Consent Date: 5/4/2005  
Has the client signed the paper agreement form: No

**Client Information Options**  
Consent Expires Upon:  
Discharge(UD) +Days 90  
Date Signed(DS) +Days [ ]  
Other Event(OE) Exp 5/4/2006  
Crim Just Cond (CJC) Exp [ ]

Description: Client's 18th Birthday

**Disclosure Selection**  
Admission (UD, +90)  
AK Status Review (UD, +90)  
ATR Interview (UD, +90)  
Behavioral Health Assessment (UD, +90)  
CASI Scores (UD, +90)  
Client Information (Profile) (UD, +90)  
Client Screening (UD, +90)  
DENS ASI Assessment (UD, +90)  
DENS ASI Lite (UD, +90)  
Discharge (Client's 18th Birthday, 5/4/2006)  
GPRA Assessment (UD, +90)  
Intake Transaction (UD, +90)

Comments: [Text Area] Other Disclosures: [Text Area]

Cancel Save Finish

# Consent, Referral and Wait List

## 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 Internet Explorer

User: Kelly2, Maureen  
Loc: Westat Testing Agency, Westat Outpatient Facility  
Client: **Jetson, Jane | Case #: 1**

Print Report Print View Help Logout

**Client Consent List** [Add New Client Consent Record](#)

Start Date	Disclosed To	Status	Signed?	Actions
7/7/2004	FEI - Development Agency	Revoked	Yes	<a href="#">Review</a>
8/3/2004	Administrative Agency	Active	Yes	<a href="#">Review</a>
12/7/2004	FEI - Dev Child Agency	Active	No	<a href="#">Review</a>
12/9/2004	Renee Test	Active	Yes	<a href="#">Review</a>
12/9/2004	Renee Test	Active	Yes	<a href="#">Review</a>
2/3/2005	Reports_Triggerpoint	Active	Yes	<a href="#">Review</a>
2/3/2005	test	Active	No	<a href="#">Review</a>
4/1/2005	Starbucks	Revoked	Yes	<a href="#">Review</a>
5/4/2005	Test Agency	Active	No	<a href="#">Review</a>

Client Disclosure Agreement - Microsoft Internet Explorer

User: Kelly2, Maureen  
Loc: Westat Testing Agency, Westat Outpatient Facility  
Client: **Jetson, Jane | Case #: 1**

Print Report Print View Help Logout

**Client Disclosure Agreement** [Create Referral Using This Disclosure Agreement](#)

**Note: Consented information may not be redisclosed.**

**Client Name:** Jetson, Jane  
**Client ID:** F1190530J467100

**Disclosed From Agency:** Westat Testing Agency

Entities with Disclosure Agreements  
Disclosed To Agency Reports\_Triggerpoint  
Disclosed To Entity (Non System Agency)  
Purpose For Disclosure XX  
Consent Date 2/3/2005  
Has the client signed the Yes  
paper agreement form

Client Information Options Consent Expires Upon Disclosure Selection

CASI Scores Discharge(UD) +Days Admission (UD, +0)  
Mental Status Report Date Signed(DS) +Days AK Status Review (UD, +0)  
TCU Drug Screen Other Event(OE) Exp ATR Interview (UD, +0)  
TCU Intake Interview Exp Behavioral Health Assessment (UD, +0)  
Treatment review Exp Crim Just Cond (CJC) Exp Client Information (Profile) (UD, +0)  
Client Screening (UD, +0)  
DENS ASI Assessment (UD, +0)  
DENS ASI Lite (UD, +0)  
Discharge (UD, +0)  
OPRA Assessment (UD, +0)  
Intake Transaction (UD, +0)

Comments Other Disclosures

[Finish](#) [Revoke](#)

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

# Consent, Referral and Wait List

## Consent to Referral

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

See Next Page For Creating A Referral

Start Date	Disclosed To	Status	Signed?	Actions
7/7/2004	FBI - Development Agency	Revoked	Yes	<a href="#">Review</a>
8/3/2004	Administrative Agency	Active	Yes	<a href="#">Review</a>
12/7/2004	FBI - Dev Child Agency	Active	No	<a href="#">Review</a>
12/9/2004	Renee Test	Active	Yes	<a href="#">Review</a>
12/9/2004	Renee Test	Active	Yes	<a href="#">Review</a>
2/3/2005	Reports_Triggerpoint	Active	Yes	<a href="#">Review</a>
2/3/2005	test	Active	No	<a href="#">Review</a>
4/1/2005	Starbucks	Revoked	Yes	<a href="#">Review</a>
5/4/2005	Test Agency	Active	No	<a href="#">Review</a>

**Client Disclosure Agreement**

Note: Consented information may not be redisclosed.

Client Name: Jetson, Jane  
Client ID: F1190530467100

Disclosed From Agency: Westat Testing Agency

Entities with Disclosure Agreements:  
 Disclosed To Agency: Non System Agency  
 Disclosed To Entity: Test Agency (Non System Agency)  
 Purpose For Disclosure Testing: Consent Date: 5/4/2005

Has the client signed the paper consent form?  Yes  No

Client Information Options:  DENS ASI Lite

Consent Expires Upon:  
 Discharge(LD) +Days:   
 Date Signed(DS) +Days:   
 Other Event(OE) Exp:   
 Crim Just Cond (CJC) Exp:

Disclosure Selection:  
 Admission (LD, +90)  
 AK Status Review (LD, +90)  
 ATR Interview (LD, +90)  
 Behavioral Health Assessment (LD, +90)  
 CASI Scores (LD, +90)  
 Client Information (Profile) (LD, +90)  
 Client Screening (LD, +90)  
 DENS ASI Assessment (LD, +90)  
 Discharge (Client's 18th Birthday, 5/4/2006)  
 GPRA Assessment (LD, +90)  
 Intake Transaction (LD, +90)

Comments:   
Other Disclosures:

[Finish](#) [Revoke](#)

**Client Referral for Jetson, Jane**

Referred By:  
 Agency: Westat Testing Agency  
 Facility: Westat Outpatient Facility  
 Staff Member: Kelly2, Maureen  
 Program:   
 State Reporting Category:   
 Reason:   
 If Other:   
 Is Consent Verification Required?   
 Is Consent Verified?   
 Continue This Episode of Care?

Referred To:  
 Signed Consents: **Test Agency**  
 Agency: Non System Agency  
 Facility:   
 Staff Member:   
 Program:   
 State Reporting Category:   
 Non-System Agency: Test Agency  
 Non-System Modality:   
 Non-System Specifier:   
 Appt Date:  Undetermined

Consents Granted:  
 Consent Date: 5/4/2005  
 Disclosure Domains:  
 Admission (LD, +90)  
 AK Status Review (LD, +90)  
 ATR Interview (LD, +90)  
 Behavioral Health Assessment (LD, +90)  
 CASI Scores (LD, +90)  
 Client Information (Profile) (LD, +90)

Referral Status: Referral Created/Pending  
 Created Date: 5/4/2005 3:25 PM

[Cancel](#) [Save](#) [Finish](#)

# Consent, Referral and Wait List

## 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 **Add New Client Referral Record**. 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.
  2. **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 - Microsoft Internet Explorer

User: Kelly2, Maureen  
Loc: Westat Testing Agency, Westat Outpatient Facility  
Client: Jetson, Jane | Case #: 1

Print Report Print View Help Logout

**Client Referrals List** [Add New Client Referrals Record](#)

Name	Referred To Agency	Referred To Facility	Non System Agency	Referred To Modality	Referral Status	Actions
Jetson, Jane	FEI - Development Agency	Adult Intensive OP		Interim-Waiting List	Placed/Accepted	<a href="#">Review</a>
Jetson, Jane	FEI - Development Agency	Mental Health Inpatient		Mental Health Inpatient Treatment	Referral Created/Pending	<a href="#">Review</a>
Jetson, Jane	FEI - Development Agency	Adult Intensive OP		Interim-Waiting List	Referral Created/Pending	<a href="#">Review</a>
Jetson, Jane		Renee Test			Referral Created/Pending	<a href="#">Review</a>
Jetson, Jane	Westat Testing Agency	Adolescent Services		Substance Abuse Outpatient	Referral Created/Pending	<a href="#">Review</a>
Jetson, Jane	Reports_Triggerpoint	Healthsouth		Intensive Outpatient	Refused Treatment	<a href="#">Review</a>
Jetson, Jane	Reports_Triggerpoint	Healthsouth		Short Term Residential	Rejected by Program	<a href="#">Review</a>
Jetson, Jane	Reports_Triggerpoint	Healthsouth		Mental Health Outpatient Treatment	Referral Terminated	<a href="#">Review</a>
Jetson, Jane	Reports_Triggerpoint	Healthsouth		Basic Education	Wait List	<a href="#">Review</a>

Client Referral - Microsoft Internet Explorer

User: Kelly2, Maureen  
Loc: Westat Testing Agency, Westat Outpatient Facility  
Client: Jetson, Jane | Case #: 1

Print Report Print View Help Logout

**Client Referral for Jetson, Jane**

**Referred By**

Agency Westat Testing Agency  
Facility Westat Outpatient Facility  
Staff Member Kelly2, Maureen  
Program  
State Reporting  
Category  
Reason  
If Other  
Is Consent Verification Required?  
Is Consent Verified?  
Continue This Episode of Care?

**Referred To**

Signed Consents  
Agency Westat Testing Agency  
Facility  
Staff Member  
Program  
State Reporting  
Category  
Non-System Agency  
Non-System Modality  
Non-System Specifier  
Appt Date Undetermined  
Consents Granted

Comments  
Referral Status Referral Created/Pending  
Created Date 5/4/2005 3:27 PM

Cancel Save Finish

# Consent, Referral and Wait List

27. Referred To - Select the **Signed Consents**, **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.

28. Select a **Program** to which you are referring and **State Reporting Category** will get populated.
29. You may provide **Comments**. Click **Finish** when done.
30. If you are sending the referral to a SWITS agency, 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.

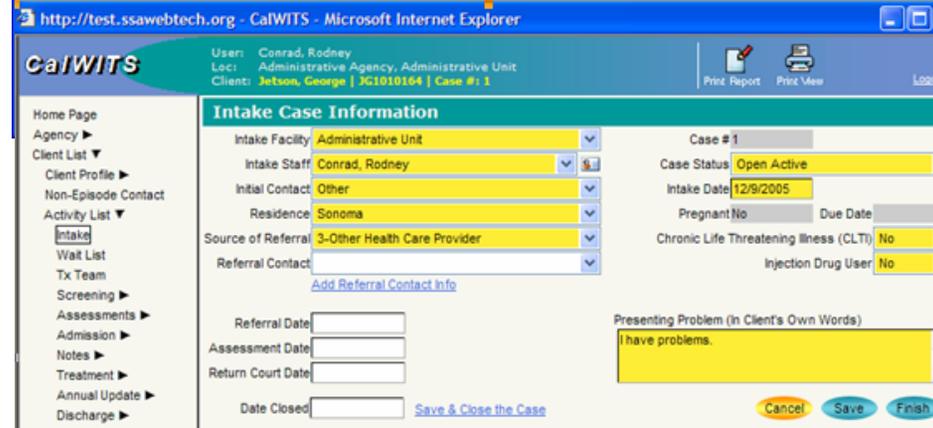
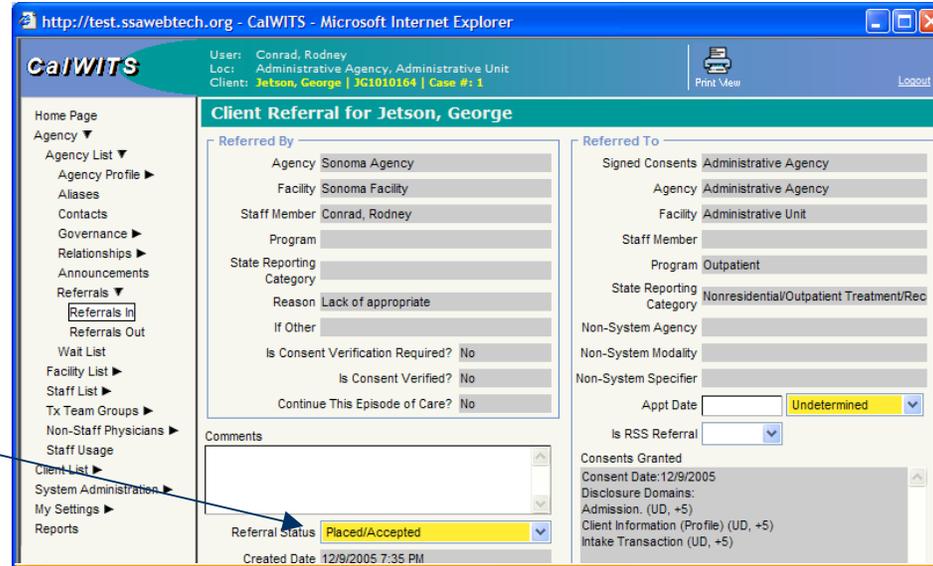
Name	Referred From Agency	Referred From Facility	Referred To Modality	Referral Status	Referral Created Date
Conrad, Rodney	Chinese Testing Agency-sing	FEH/Ws	Substance Abuse Outpatient	Referral Created/Pending	4/15/2004
Barr, Marshall	Reports_Triggerpoint	Healthsouth	Intensive Outpatient	Referral Created/Pending	1/20/2005
Cohen, Seth	Reports_Triggerpoint	Healthsouth	Intensive Outpatient	Referral Created/Pending	1/20/2005

Name	Referred To Agency	Referred To Facility	Non System Agency	Referred To Modality	Referral Status	Referral Created Date
Jetson, Jane	FEI - Development Agency	Mental Health Inpatient		Mental Health Inpatient Treatment	Referral Created/Pending	8/3/2004
Jetson, Jane	FEI - Development Agency	Adult Intensive OP		Interim-Waiting List	Referral Created/Pending	8/12/2004
Doe, John					Referral Created/Pending	11/11/2004
Jetson, Jane			Renee Test		Referral Created/Pending	12/9/2004
Jetson, Jane	Westat Testing Agency	Adolescent Services		Substance Abuse Outpatient	Referral Created/Pending	12/21/2004
Jetson, Jane			Test Agency		Referral Created/Pending	5/4/2005

# Consent, Referral and Wait List

## Accepting a Referral

- When another agency has referred a client to your agency, that client will show up in your "Referrals In" listing.
- 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:
  - The client will be taken off of the referrals In list.
  - 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.



# Consent, Referral and Wait List

## 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”.

Client Search

Agency: Administrative Agency | Facility: [Dropdown]

First Name: rod\* | Last Name: [Text Box]

SSN: [Text Box] | DOB: [Text Box]

Client ID: [Text Box] | Provider Client ID: [Text Box]

Staff: [Dropdown] | Primary Care Staff: [Text Box]

Case Status: All Clients | [Clear] [Go]

Client ID	Full Name	DOB	SSN	Gender	Actions
CR1070770	Jetson, Jane	7/7/1970	212-55-1234	Female	<a href="#">Profile</a>   <a href="#">Activity List</a>

Agency	Client Id	Client Name	DOB	SSN	Gender	Actions
Sonoma Training Agency South	CR1070770	Conrad, Rodney	7/7/1970	212-55-1234	Male	<a href="#">Activity List</a>

Consented Case Activity List from Sonoma Training Agency South for Conrad, Rodney

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

This notice accompanies a disclosure of information concerning a client in alcohol/drug abuse treatment, made to you with consent of such client. This information has been disclosed to you from records protected by Federal confidentiality rules (42 C.F.R. Part 2). The Federal rules prohibit you from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 C.F.R. Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patient.

Activity	Consent Period	Created Date	Status	Actions
Admission			Not Available	
Client Information (Profile)	Until Discharge	12/6/2005 2:34:27 PM	In Progress	<a href="#">Review</a>

# Consent, Referral and Wait List

## 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.

http://test.ssawebtech.org - CalWITS - Microsoft Internet Explorer

User: Conrad, Rodney  
 Loc: Administrative Agency, Administrative Unit  
 Client: Conrad, Rodney | CR1070770 | Case #: 1

Print View Logout

### Consented Case Activity List from Sonoma Training Agency South for Conrad, I

PROHIBITION ON REDISCLOSURE OF INFORMATION CONCERNING CLIENT IN ALCOHOL OR DRUG ABUSE TREATMENT  
 This notice accompanies a disclosure of information concerning a client in alcohol/drug abuse treatment, made to you with consent of such client. This information has been disclosed to you from records protected by Federal confidentiality rules (42 CFR Part 2). The Federal rules prohibit you from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patient.

Activity	Consent Period	Created Date	Status	Actions
Admission			Not Available	
Client Information (Profile)	Until Discharge	12/6/2005 2:34:27 PM	In Progress	<a href="#">Review</a>

http://test.ssawebtech.org - CalWITS - Microsoft Internet Explorer

User: Conrad, Rodney  
 Loc: Administrative Agency, Administrative Unit  
 Client: Conrad, Rodney | CR1070770 | Case #: 1

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### Client Profile

Current First Name	Rodneys	State Client ID	CR1070770
Middle Name		Provider Client ID	
Current Last Name	Conrad	SSN	212-55-1234
Birth First Name	Rodney	Driver's License	1234567 Maryland
Birth Last Name	Conrad	Medicaid #	
Mother's First Name	Betty	Place of Birth	Not Applicable None or not
Gender	1-Male	Consent on File for Future Contact	Yes
DOB	7/7/1970	Has Paper File	Yes
No Readmit Until		Record Created By	Denis, Ron Created Date 12/6/2005 2:34 PM
Last Updated By	Conrad, Rodney	Last Updated Date	12/9/2005 7:22 PM

Finish Next

### Alternate Names

Last Name	First Name	Middle Name	Actions

### Addresses

Address Type	Address	Confidential	Created	Updated	Actions

# Consent, Referral and Wait List

## 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 **Put Client on Waiting for Another Program** hyperlink. This will bring up the Client Wait List screen.

**Client Waiting List** [Print Report](#) [Print View](#) [Help](#) [Logout](#)

User: Kelly2, Maureen  
Loc: Westat Testing Agency, Westat Outpatient Facility  
Client: **Jetson, Jane** | Case #: 1

**Client Waiting List** [Put Client on Waiting for Another Program](#)

Full Name	Program	Staff	Pregnant	Due	Dual Diag.	HIV	IV Drugs	Interim Ser	Placement Asst	Start Date	Actions
Jetson, Jane	Womens SA Outpatient		Yes	8/14/2005	No	No	No	Yes	No	7/6/2004	<a href="#">Review</a>
Jetson, Jane	Adult outpatient		Yes	8/14/2005		No	No			8/11/2004	<a href="#">Review</a>

**Client Wait List for Jetson, Jane**

Agency: Westat Testing Agency  
Facility: Westat Outpatient Facility

Select Program:

Select Staff:

Modality:

Wait Start Date: 5/4/2005  
Wait End Date:

Added to Wait List By: Kelly2, Maureen

Dually Diagnosed?  Assistance Needed to Place This Client

Patient is Injecting: No Referred to Interim Services

Patient is Pregnant: Yes HIV Positive: No

Due Date: 8/14/2005

Removed From Wait List By:

Reason:

Comments:

[Admit Client](#)

# Consent, Referral and Wait List

## 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.

Client Wait List - Microsoft Internet Explorer

CaIWITS User: Kelly2, Maureen Loc: Westat Testing Agency, Westat Outpatient Facility Client: **Jetson, Jane** | Case #: 1

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### Client Wait List for Jetson, Jane

Agency: Westat Testing Agency  
 Facility: Westat Outpatient Facility  
 Select Program: [Dropdown]  
 Select Staff: [Dropdown]  
 Modality: [Dropdown]  
 Wait Start Date: 5/4/2005  
 Wait End Date: [Text]  
 Added to Wait List By: Kelly2, Maureen [Dropdown]  
 Dually Diagnosed?: [Dropdown] Assistance Needed to Place This Client: [Dropdown]  
 Patient is Injecting: No Referred to Interim Services: [Dropdown]  
 Patient is Pregnant: Yes HIV Positive: No  
 Due Date: 8/14/2005  
 Removed From Wait List By: [Dropdown]  
 Reason: [Text]  
 Comments: [Text Area]  
[Admit Client](#)  
 [Cancel] [Save] [Finish]

Client Waiting List - Microsoft Internet Explorer

CaIWITS User: Kelly2, Maureen Loc: Westat Testing Agency, Westat Outpatient Facility Client: **Jetson, Jane** | Case #: 1

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### Client Waiting List

**Put Client on Waiting for Another Program**

Full Name	Program	Staff	Pregnant	Due	Dual Dian.	HIV	IV Drugs	Interim Ser	Placement Asst	Start Date	Actions
Jetson, Jane	Womens SA Outpatient		Yes	8/14/2005	No	No	No	Yes	No	7/6/2004	<a href="#">Review</a>
Jetson, Jane	Adult outpatient		Yes	8/14/2005		No	No			8/11/2004	<a href="#">Review</a>