

Crisis Programs Workflow

This Tip Sheet will walk users through how to enter and view inquiries. This Tip Sheet may change as our trainings and systems are updated. Please visit our website [BHS EHR \(saccounty.gov\)](https://saccounty.gov/bhs-ehrsupport) for the most updated version. If any additional help is needed you can contact us at bhs-ehrsupport@saccounty.gov.


Documents to complete may include but are not limited to:

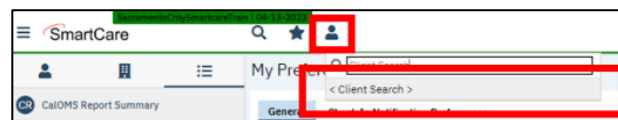
1. Inquiries (Client)
2. Client Programs (Client)
 - Used for Enrollment to and Discharge from a program.
3. Crisis Assessment (Client)
 - For crisis programs, this will be the Crisis Assessment unless otherwise directed.
4. CalAIM Assessment (Client)
 - For Crisis Residential Programs (CRP), this will be the assessment to be completed.
5. Services/Notes (Client)
 - For services provided, including discharges.

Inquiries

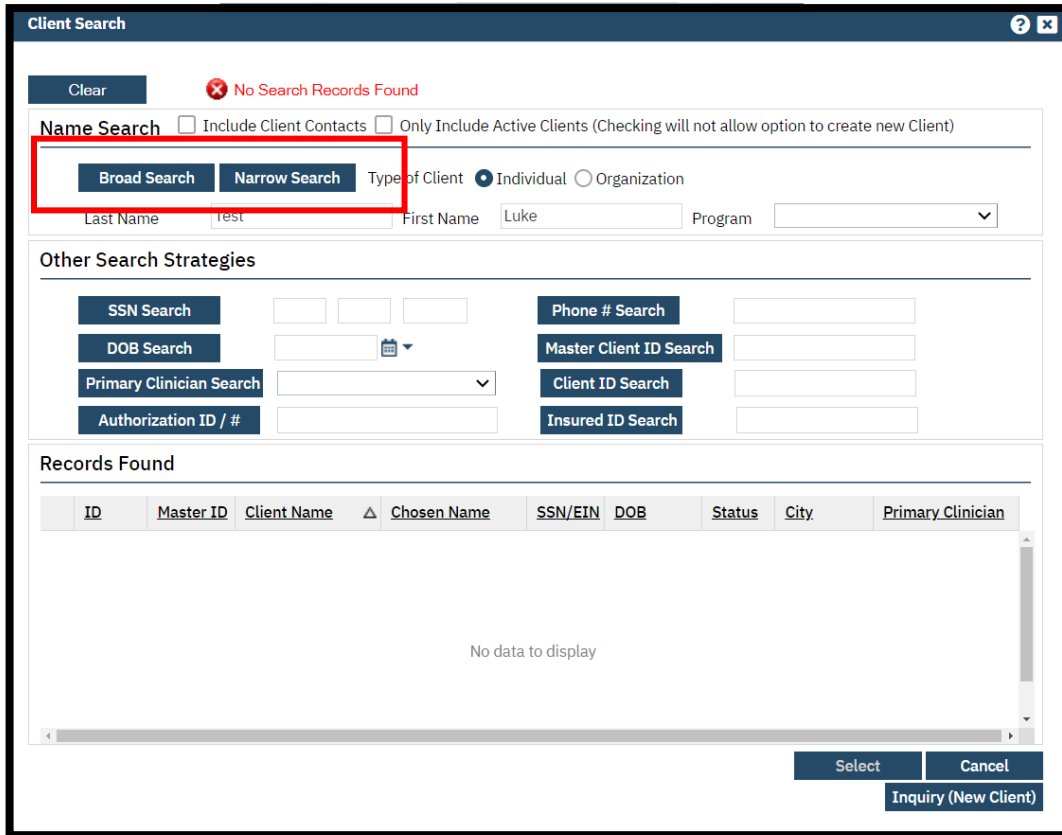
All clients that reach out for services or information should have an inquiry completed. An inquiry is used to request services into a program. This can be done for new clients or existing clients. An inquiry should be done before a client enrolls into your program or when you are requesting they be enrolled into a different program. This can be done by the provider/program or Access.

- The client goes through Access or System of Care (SOC) and they refer them to your program. In this circumstance, the inquiry will be completed by Access or SOC. If the request is approved, a request for enrollment into your program will be sent.
- The client comes directly to your program requesting services. In this circumstance, you are able to start the inquiry and assign it to a clinician at your agency to disposition. An inquiry is still required to be completed for all clients. Complete the disposition for the new client and enroll them into your agency if appropriate.

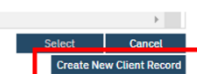
1. A client must be selected prior to completing the inquiry. Find this icon  and click on it.
2. A drop down will appear and you may type the client's name or click on [<Client Search>](#).



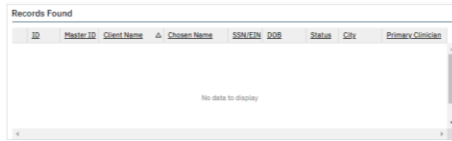
3. Enter the potential clients last and first name. Click “Narrow Search” to specifically search that client. If they do not populate at the bottom, you can click “Broad Search” to search anyone with a similar name. If you still do not see the client, click “Inquiry (New Client)”.



- For more guidance you can click on: [New Client Search Video](#).
 - If client already exists in the system, it will populate in the box under **Records Found**. Click on radio button next to the selected name and click **Inquiry (Selected Client)**
 - If the client does not exist in the system, click the **Inquiry (New Client)**
4. This will take you to the Inquiries Details screen. Fill in the Client Information section with information regarding that inquiry.
 5. Enter the Disposition for that inquiry.
 6. Click Save
 7. If your client is a New Client (not currently in the SmartCare system) complete the following steps 8-10:
 8. Select the Link/Create Client button.
 9. The **Client Search** window will appear.
 10. Click on **Broad Search**, **SSN Search**, and **DOB Search**.
 - If the client does not exist the **Create New Client Record** button will become active (text turns from grey to white), click on it.



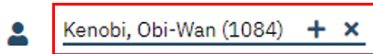
- This will allow the client to be assigned a client ID and a chart will be created.
- If the client does exist, client's name will populate in the **Records Found** box.



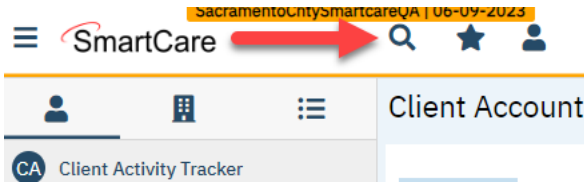
- For more guidance on inquiries, see our Inquiries Tip Sheet located on our website: <https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/Avatar.aspx>

Enrolling or Discharging a client

1. The **Client Programs (Client)** list page is used to both enroll and discharge a client from a program. A client will need to be selected prior to opening this screen.



2. Open the **Client Programs (Client)** screen by searching for the form in the search field.



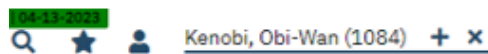
3. On the top right-hand corner, click on the **New** icon.



4. The **Program Assignment Details** screen will populate. Select the appropriate Program Name from the drop-down menu.

5. Under Current Status click Enrolled or Discharge as appropriate.

- a. If you are enrolling a client into your program, enter the Enrollment Date.
- b. If you are discharging a client enter a Discharge Date.



Program Assignment Details

Program Assignment **Additional Information**

General

Program Name: Primary

Client:

Assigned Staff:

Comment:

Current Status: (dropdown menu open showing: Requested, Enrolled, Discharged)

Requested Date:

Enrolled Date:

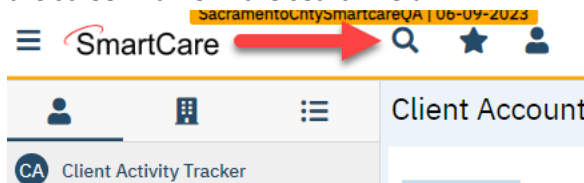
Discharged Date:

Next Schedule Service:

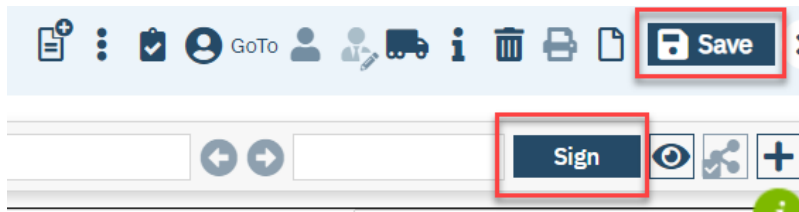
6. Click Save.

Assessment/Screening Tools

1. Crisis Programs will use the [Crisis Assessment \(Client\)](#) screening tool. Crisis Residential Programs (CRP) will use the [CalAIM Assessment \(Client\)](#). A client must be selected prior to opening the assessment.
2. Open the appropriate assessment based on your program ([Crisis](#) or [CRP](#)) by searching for the screen name in the search field.



3. Complete the assessment.
4. Save the document.
5. Sign the document.



Services/Notes

1. For guidance on how to create a note, please see the video posted on the CalMHSA website <https://2023.calmhsa.org/>
2. Click on [How to Create a Progress Note](#).