



## **Outreach Services**

This Tip Sheet will walk users through how to document for Outreach services for unknown clients. This process may eventually change as the system is updated. Please visit our website <a href="https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx">https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx</a> for the most updated version. If any additional help is needed you can contact us at <a href="https://bhs-ehrsupport@saccounty.gov">bhs-ehrsupport@saccounty.gov</a>.

## SAC-General Outreach (Group outreach)

In the event you are performing general outreach services to a group of people then you would need to document using the client Outreach, Client (800013554), DOB 1/1/1965 and enter the SAC-General Outreach procedure in a service note in your program.

1. Ensure the outreach client is enrolled into your program. This will only have to be done

once. Click on the Client Search icon and click <Client Search> and enter the demographic data below

- a. First name: Client
- b. Last name: Outreach
- c. Medical Record Number:
- d. Date of birth: 1/1/1965
- 2. Click on the Search icon  $\checkmark$  and search for the "Client Programs (Client)" screen.
  - a. This page will display the programs Outreach, Client is enrolled in. See if your program is listed with a status of "Enrolled". If it is, skip to Step 8.

Client Programs (1)							
All Programs		~	All Status	ses		~	Other
Program Name	Status		Enrolled	$\nabla$	Discharged	Assigned Staff	Primary
xxxxSacCo-APSS-Broa	Enrolled	(	07/01/202	4			Yes

3. If your program is not listed, click the New button  $\square$ 





Program Assign	ment Details						<u>ر</u> با
Program Assignment	Additional Information						
General							
Program Name 🛛 4	xxxxSacCo-APSS-Broadway	~	Primary Current Statu	ıs 5	Enrolled	~	—
Client	Outreach, Client						
Assigned Staff		~	Requested D	ate		<b>≣</b> ▼	
			Enrolled Date	e <u>6</u>	07/01/2024	iii ▼	
Comment			Discharged D	ate		iii ▼	
			Next Schedu	le Service			
Removed							

- 4. Select your program from the Program Name drop down menu.
- 5. Select Enrolled from the Current Status drop down menu.
- 6. Enter today's date un the Enrolled Date field.
- 7. Click Save in the top right corner.
  - a. Reminder: This step does not need to be completed if the Outreach, Client is already enrolled in your program.
- 8. To begin documenting the outreach services click on the Search icon *Q* and search for "New Service Note"

Effective 04/15/20	024	<b></b>	Status New			Author Sald	ivar, Sarah			✔ 03/22/2024
Service Note	15 fillin	ng Diagnosis	Warnings							
Service									4.0	
Status		Show		~		Start Date	04/15/2024	1 🗰 🕶	12	
Program	9	xxxxSacCo-APS	8-Broadway	~		Start Time	9:00 AM		13	
Procedure	10	SAC-General O	utreach	~	Modifier	Travel Time		Minutes		
Location	(11)	Other Place of S	ervice	~						
Clinician	00	Saldivar, Sarah				Documentation Time		Minutes		
Mode Of Delivery			~			Service Time	240	Minutes		14
Cancel Reason	Reason			Attending	~		~			
						Referring				~
Evidence Based Pr	actices			¥						
Transportation Ser	vice	No		~		Interpreter Services M	leeded			

- 9. Select your program in the Program field.
- 10. Select the appropriate procedure code from the procedure code drop down. The codes to use are:
  - a. <u>SAC-General Outreach</u> procedure if you are outreaching to multiple clients in a specific area.
- 11. Select the appropriate location from the drop-down menu.
- 12. Enter the date you are documenting for in the Start Date field.





- 13. Enter the time your outreach attempts began in the Start Time field.
- 14. Enter the amount of time you spent doing outreach in minutes in the Service Time field.
- 15. Click on the Note tab to access the PEI Outreach progress note.

I Services			
Effective 04/15/2024	Status New	Author Saldivar, Sarah	♥ 03/22/2024
Service Note Billing Diagnosis	Warnings		
PEI Services			
Title of Service Provided 16			
Service Location			
Location Zip Code	18		
Total Number Served	19		
Age Group Served 20 0-16 17-25 26-59 60+y/o Notes/Purpose of Contact			

- 16. Enter the title of services provided
- 17. Enter the service location, giving as much detail as possible including cross streets.
- 18. Enter the zip code the services were provided, if known.
- 19. Enter the total number of clients serviced during the outreach session.
- 20. Select the age group that was served, multiple selections can be made at once.
- 21. Enter the documentation piece of your service note in the Notes/Purpose of Contact field.
- 22. Once you have completed your progress note click the Sign button to finalize your note.







## SAC-Targeted Outreach (Individual Client Outreach)

When serving an individual client for targeted outreach it very important to try to get their name or nickname they are comfortable sharing and date of birth to avoid entering duplicate clients in SmartCare. In the event you are performing a targeted outreach service to an individual client who won't disclose their name then you would need to document using the naming convention for unknown clients below and enter the SAC-Targeted Outreach procedure in a service note in your program.

1. Ensure the unknown naming convention is used for your client and the client is enrolled

into your program. Click on the Client Search icon and click <Client Search> and enter the demographic data below

Example for full name when you have the Street Name-"FIRST NAME: Name provided/Florin Road, LAST NAME: Unknown."

Example for full name when you do not have the Street Name-"FIRST NAME: Unknown May 29 2024 12:11 p.m., LAST NAME: Unknown."

- a. First name: Jane/Florin Road
- b. Last name: Unknown
- c. Date of birth: 1/1/1965 (if they won't disclose)
- 2. If you are serving a client who won't disclose their information but later, you are able to get that information, it's important to go back into SmartCare and update the Client Information (client) screen with their information.
- 3. If your program is not listed, click the New button 🖵

Program Assign	ment Details							¢ ګ
Program Assignment	Additional Information							
General								
Program Name 🛛 4	xxxxSacCo-APSS-Broadway	~	Primary	Current Status	5	Enrolled	~	
Client	Outreach, Client							
Assigned Staff		$\checkmark$		Requested Date		<b></b>		
				Enrolled Date	6	07/01/2024 🗰		
Comment				Discharged Date	-			
				Next Schedule Service				
Removed								

- 4. Select your program from the Program Name drop down menu.
- 5. Select Enrolled from the Current Status drop down menu.
- 6. Enter today's date in the Enrolled Date field.
- 7. Click Save in the top right corner.





- a. **Reminder:** This step does not need to be completed if the *targeted outreach individual* is already enrolled in your program.
- 8. To begin documenting the targeted outreach services click on the Search icon *Q* and search for "New Service Note"

Effective 04/15/20	024	Status	s New		Author Sald	ivar, Sarah		~	03/22/2024
Service Note	15 illin	ng Diagnosis Warn	ings						
Service									
Status		Show	~		Start Date	04/15/20	24 🗇 🕶 🛄	1	
Program	9	xxxxSacCo-APSS-Broady	vay 🗸		Start Time	9:00 AM	13	1	
Procedure	10	SAC-Targeted Outread	h 🗸	Modifier	Travel Time		Minutes		
Location	11	Other Place of Service	~						
Clinician	00	Saldivar, Sarah			Documentation Time		Minutes		
Mode Of Delivery		~			Service Time	240	Minutes	14	
Cancel Reason			~		Attending			~	
					Referring			~	
Evidence Based Pr	actices		٣						
Transportation Ser	vice	No	~		Interpreter Services N	leeded			

- 9. Select your program in the Program field.
- 10. Select the appropriate procedure code from the procedure code drop down. The code to use for targeted outreach services is **SAC-Targeted Outreach**.
- 11. Select the appropriate location from the drop-down menu.
- 12. Enter the date you are documenting for in the Start Date field.
- 13. Enter the time your outreach attempts began in the Start Time field.
- 14. Enter the amount of time you spent doing outreach in minutes in the Service Time field.
- 15. Click on the Note tab to access the PEI Outreach progress note.





fective 04/15/2024	<b></b>	Status New	Author	Saldivar, Sarah	✓ 03/22/2024
ervice Note B	illing Diagnosis	Warnings			
EI Services					
itle of Service Provide	a <u>16</u>				
ervice Location	17/				
ocation Zip Code		18			
otal Number Served		19			
ge Group Served 0-16 17-25 26-59	20				
60+y/o	21				

- 16. Enter the title of services provided.
- 17. Enter the service location, giving as much detail as possible including cross streets.
- 18. Enter the zip code the services were provided in, if known.
- 19. Enter the total number of clients serviced during the outreach session. For targeted outreach services this total should be one.
- 20. Select the age group of the individual.
- 21. Enter the documentation piece of your service note in the Notes/Purpose of Contact field.
- 22. Once you have completed your progress note click the Sign button to finalize your note.

