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 https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx for the most updated version. If any additional help is needed you can contact us at bhs-ehrsupport@saccounty.gov.

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.

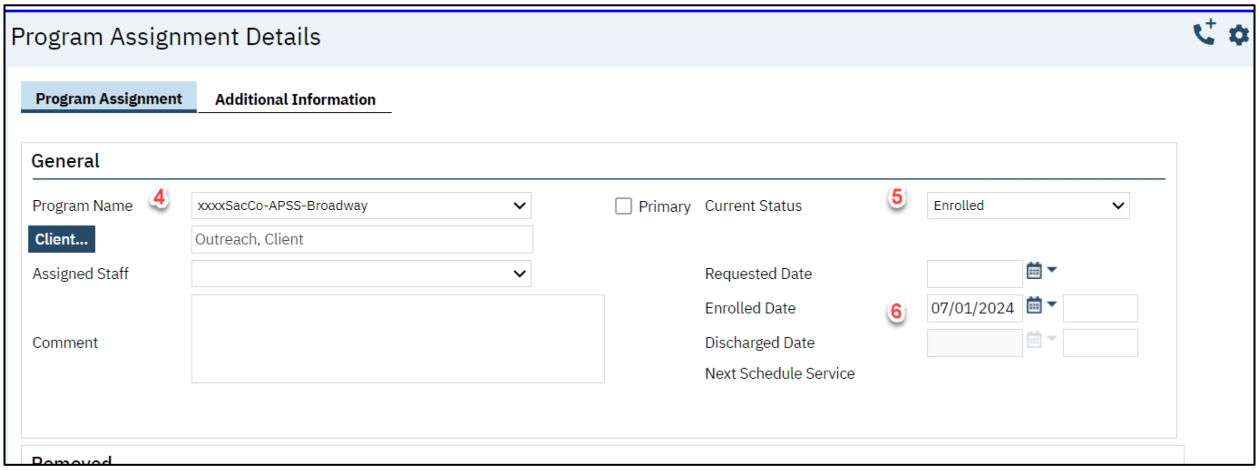
1. Ensure the outreach client is enrolled into your program. This will only have to be done once. Click on the Client Search icon and click <Client Search> and enter the demographic data below
   a. First name: Client
   b. Last name: Outreach
   c. Medical Record Number:
   d. Date of birth: 1/1/1965
2. Click on the Search icon 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)

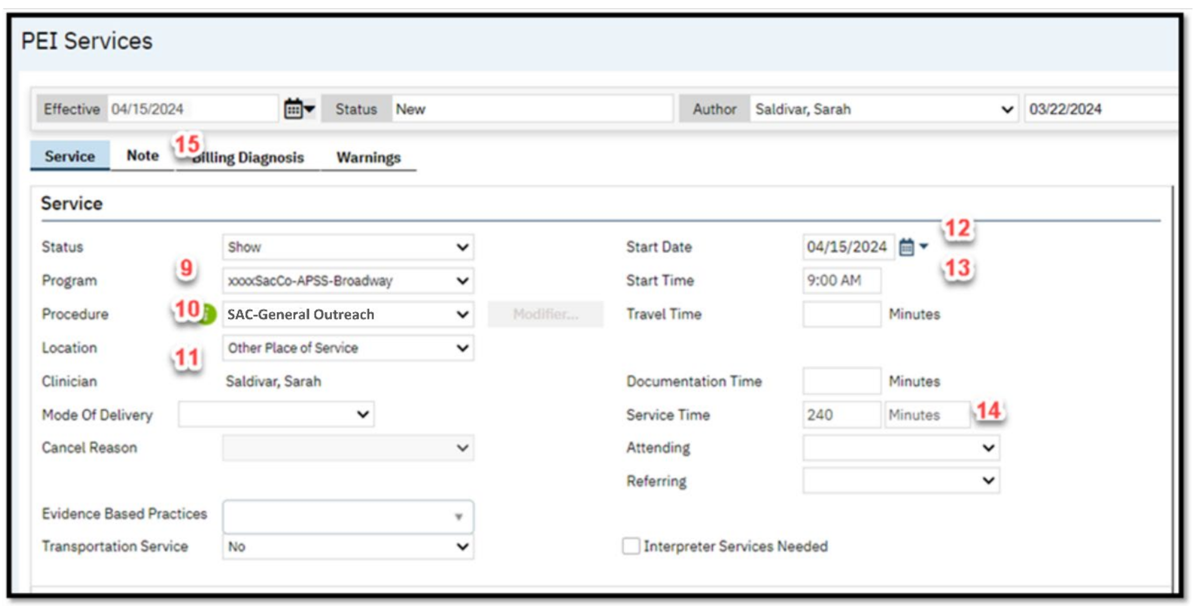
All Programs | All Statuses | Other

Program Name	Status	Enrolled	Discharged	Assigned Staff	Primary
xxxxSacCo-APSS-Broa...	Enrolled	07/01/2024			Yes

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

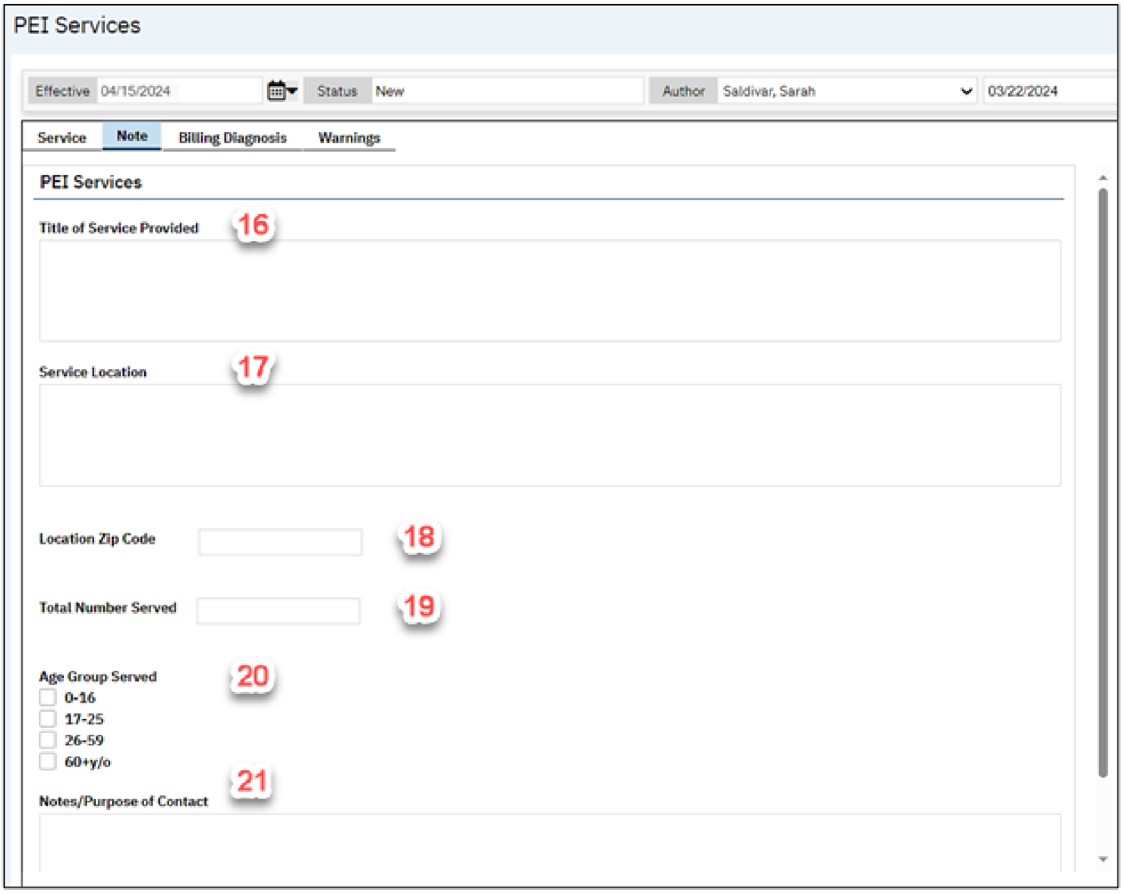


4. Select your program from the Program Name drop down menu.
5. Select Enrolled from the Current Status drop down menu.
6. Enter today's date un the Enrolled Date field.
7. Click Save in the top right corner.
    a. Reminder: This step does not need to be completed if the Outreach,Client is already enrolled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

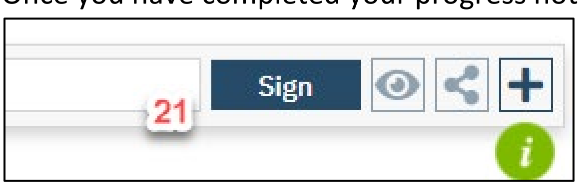


9. Select your program in the Program field.
10. Select the appropriate procedure code from the procedure code drop down. The codes to use are:
    a. <u>SAC-General Outreach</u> procedure if you are outreaching to multiple clients in a specific area.
11. Select the appropriate location from the drop-down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



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.

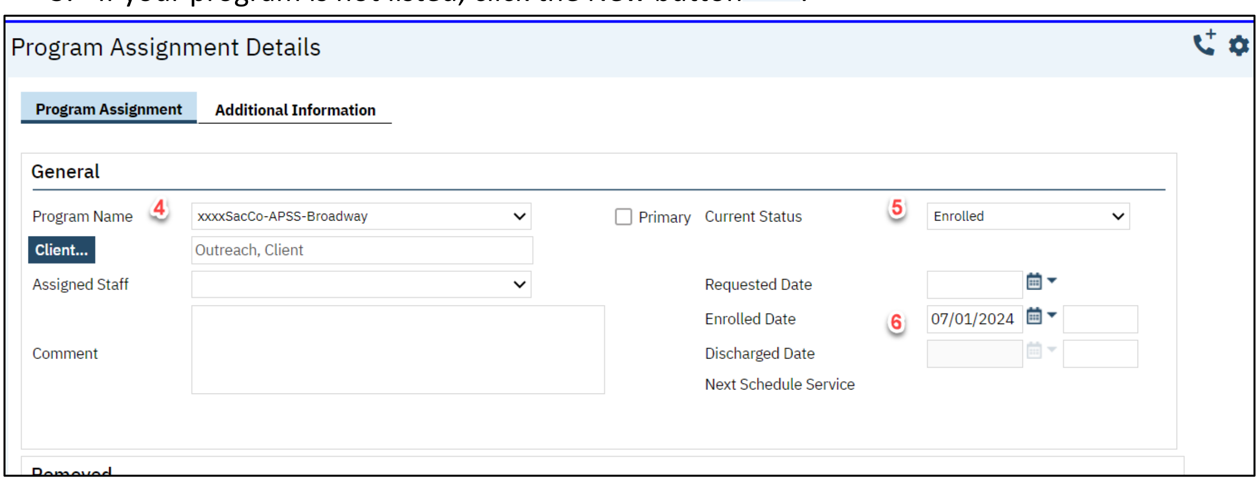
1. Ensure the unknown naming convention is used for your client and the client is enrolled into your program. Click on the Client Search icon and click <Client Search> and enter the demographic data below

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)

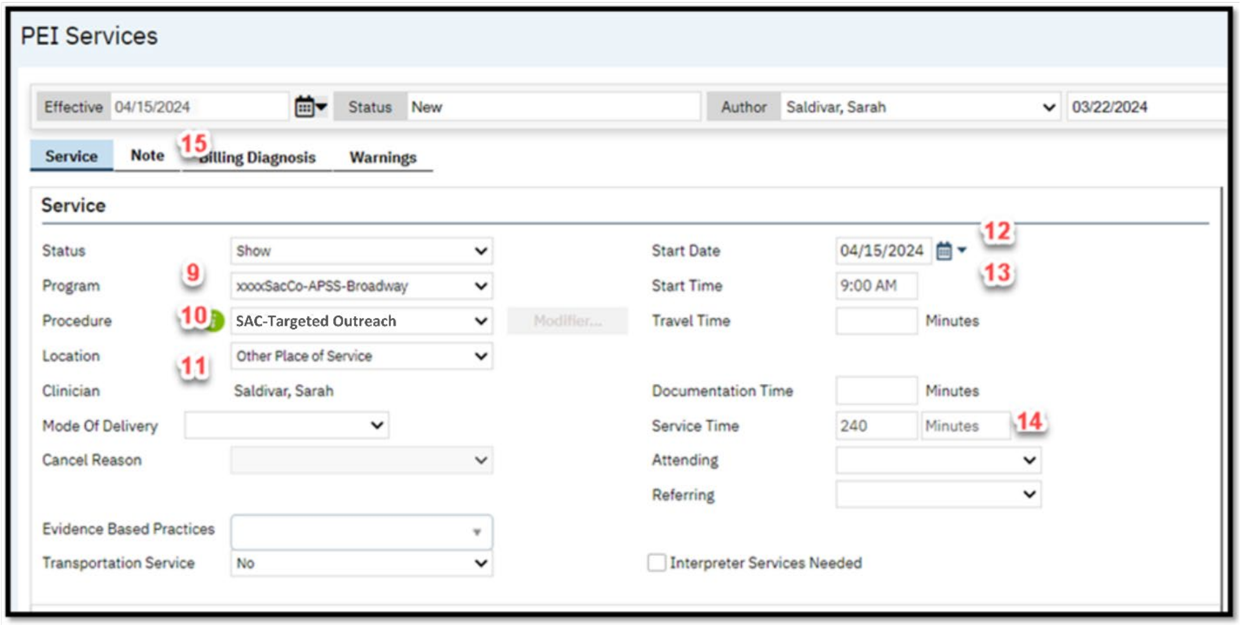
2. If you are serving a client who won't disclose their information but later, you are able to get that information, it's important to go back into SmartCare and update the Client Information (client) screen with their information.
3. If your program is not listed, click the New button .



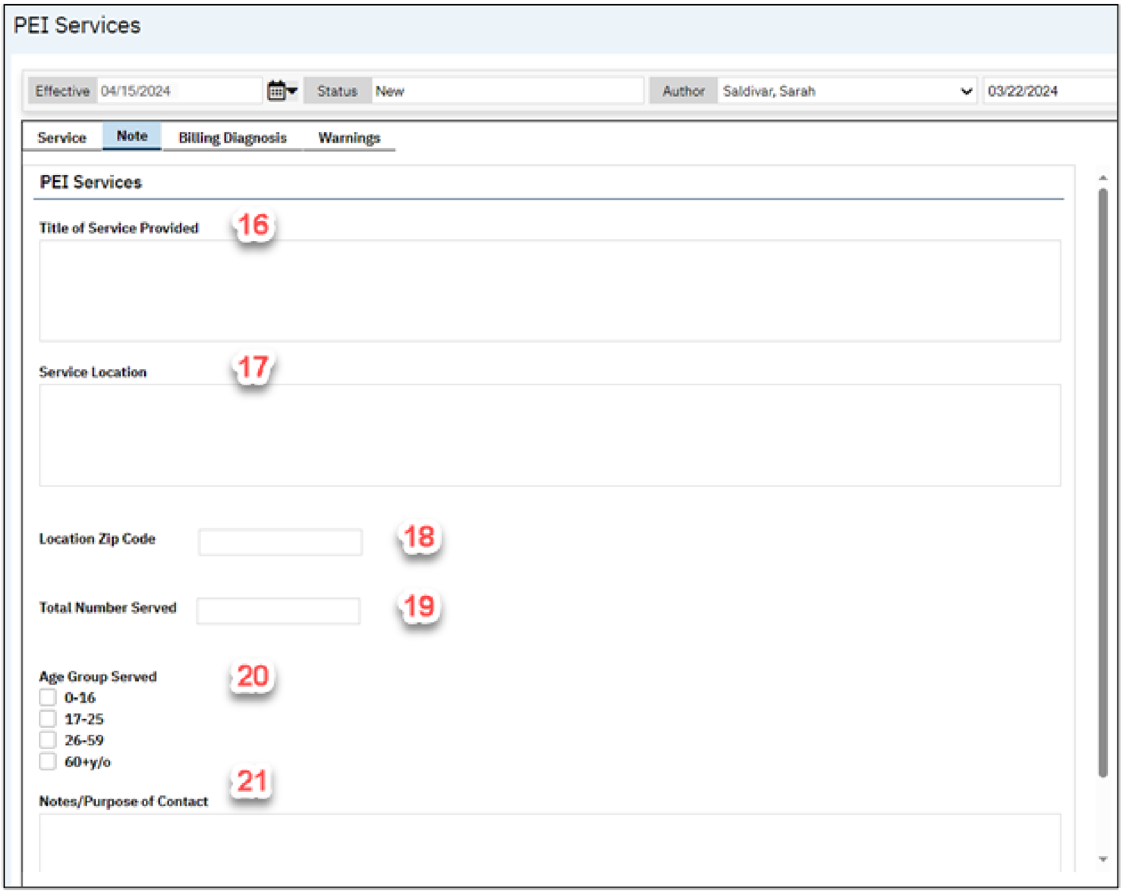
4. Select your program from the Program Name drop down menu.
5. Select Enrolled from the Current Status drop down menu.
6. Enter today's date in the Enrolled Date field.
7. Click Save in the top right corner.

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 and search for “New Service Note”



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.



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.