

Timely Access Data Tool (TADT) Information for SUPT Programs Tip Sheet

This Tip Sheet will walk users through the process for the TADT tools. This tip sheet may change as trainings are updated. Please view our webpage for the most up to date version. If any additional help is needed, please contact us at bhs-ehrsupport@saccounty.gov.

What is the TADT?

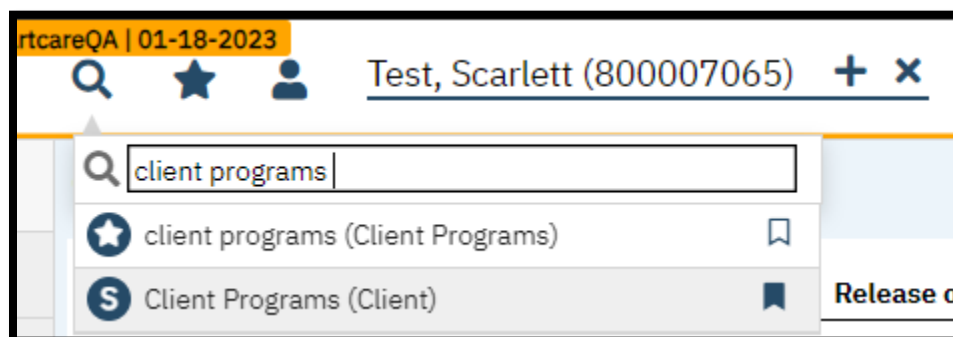
The Timely Access Data Tool (TADT) is a tool to track timeliness. There are two TADT forms which SUPT providers would use. The **DMC-ODS Opioid Timeliness Record (Client)** form is used by NTP providers. The **DMC-ODS Outpatient Timeliness Record (Client)** is to be used by outpatient, intensive outpatient and residential providers. These forms are only required for new clients. A new client is defined as someone who has not received Medi-Cal reimbursable services within the last year.

Requirements prior to completing the TADT

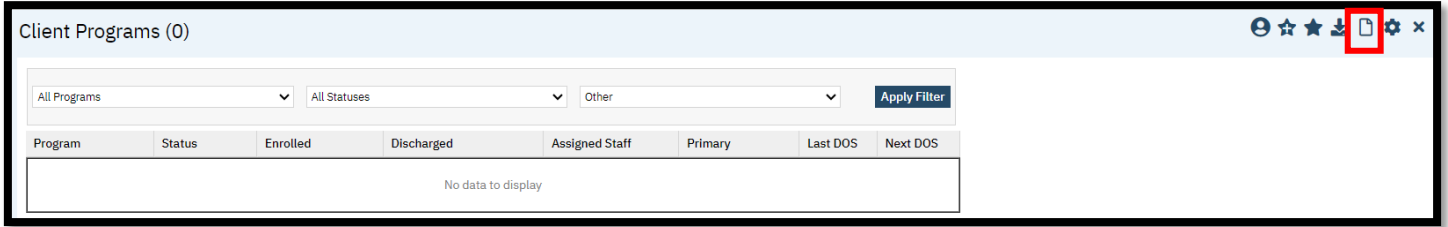
- When a potential client comes to your agency you will complete the Inquiry and client ID (if applicable) per your normal process.
- To begin the TADT the client must be requested or enrolled into your program.
 - Please note, if the client is enrolled into the program a CalOMS is required. To bypass this requirement while still tracking the timeliness, you can request enrollment into your program while waiting to see if an enrollment is appropriate.
- Only required for new clients who have not have received Medi-Cal reimbursable services in the past year.

Requesting enrollment process

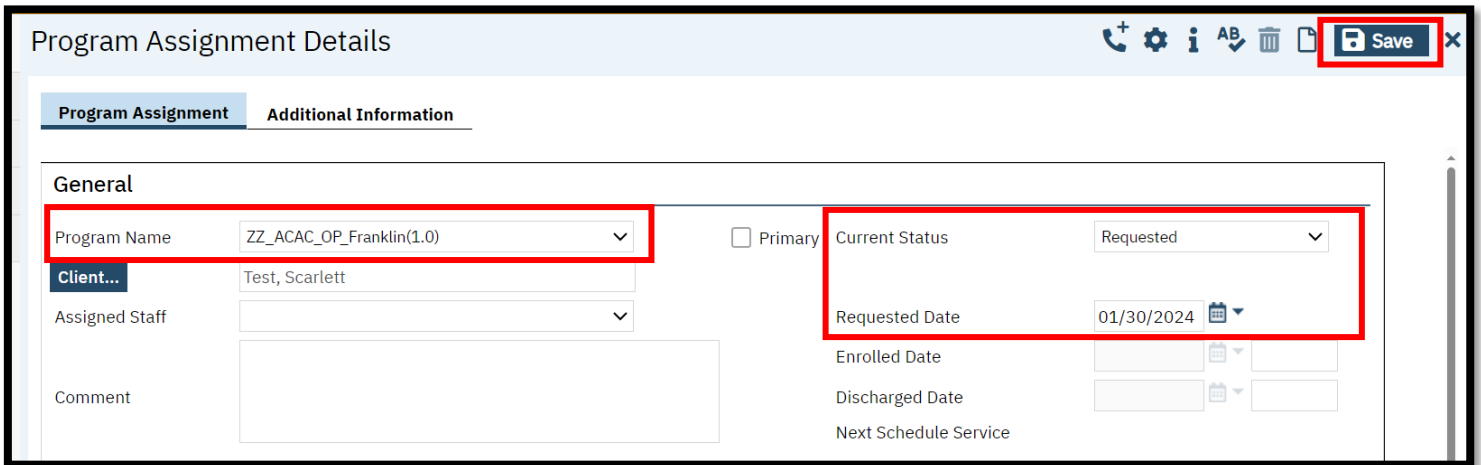
1. To request or enroll a client, search *Client Programs (Client)* in your search bar, with your client selected.



2. You'll see a blank list page. Click the *New* button on the upper right.

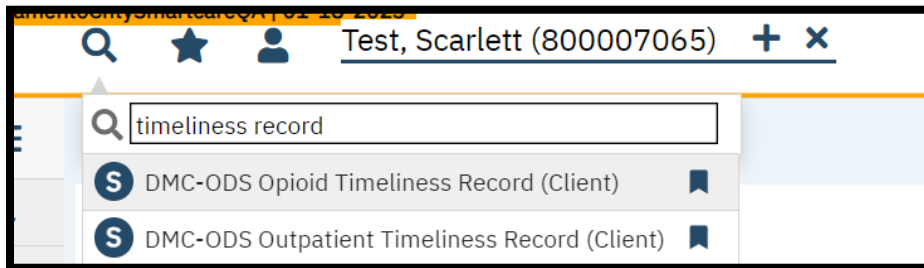


3. Select your *Program Name*, and enter *Requested* or *Enrolled* under *Current Status*, whichever is applicable. Do not enter an *Assigned Staff*, staff should be assigned using the *Treatment Teams* form. Click *Save* to save the request.

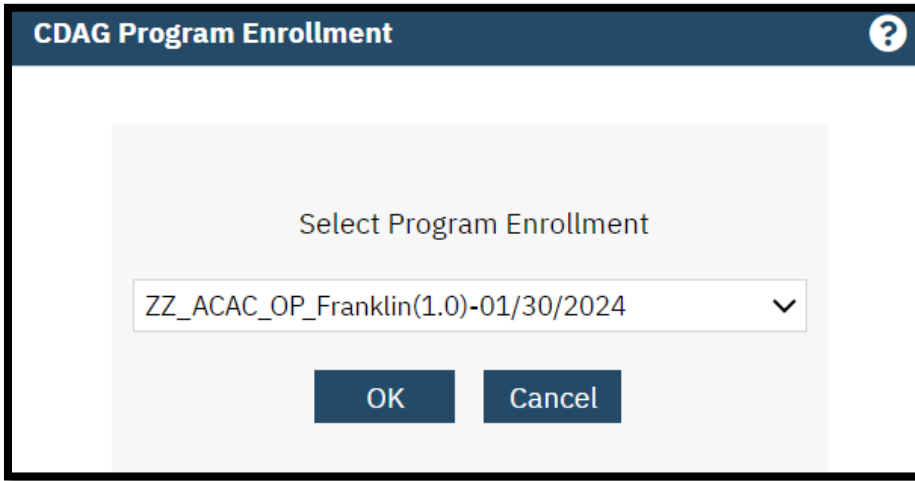


Opening the TADT

4. Search for the keywords *"timeliness record"* in your search bar. You'll see two options, choose the option that is most appropriate for your program (NTP or outpatient).



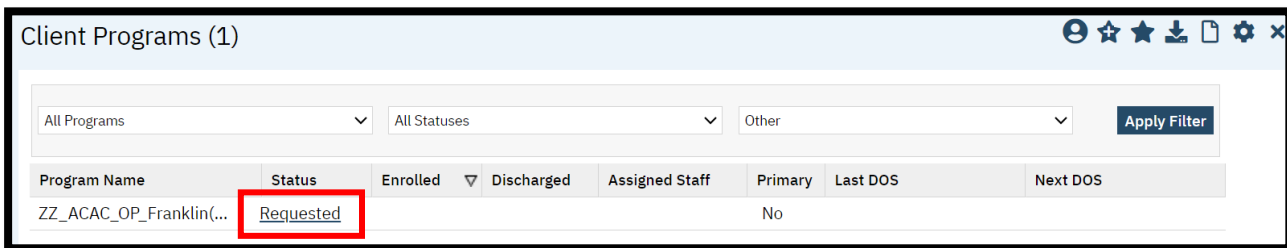
5. As long as the client has been enrolled or requested into your program you will see a CDAG Program Enrollment box pop up. Make sure your program is selected and click OK.



6. Follow the link to CalMHSA’s webpage for instructions on how to fill out the TADT form.
 - [How to Complete the DMC Opioid Timeliness Record - 2023 CalMHSA](#) used for NTP programs.
 - [How to Complete the DMC Outpatient Timeliness Record - 2023 CalMHSA](#) used for outpatient programs.
7. The form does not need to be completed at once. You can click *Save* to save your work each time you go into the form. Once complete, you will click *Sign*.

Updating Requested Status

8. If the client was requested rather than enrolled, they will need to either be discharged from the request or enrolled into the program if they need a different level of care. For either determination, you will go into *Client Programs (Client)* for the selected client again.
9. Rather than clicking on the *New* button, this time you will click on the hyperlink that says *Requested*.



10. Change the status from *Requested* to either *Enrolled* or *Discharged*, based on the determination of whether they will be receiving services at that program.

Current Status	Requested
Requested Date	
Enrolled Date	
Discharged Date	

A screenshot of a form with a dropdown menu open. The dropdown menu shows three options: Requested, Enrolled, and Discharged. The 'Requested' option is currently selected in the main dropdown.

11. Whichever option you choose, make sure to put the *Date* next to that corresponding line.

Current Status	Enrolled
Requested Date	01/30/2024
Enrolled Date	01/31/2024
Discharged Date	
Next Schedule Service	

A screenshot of the same form, but now with dates entered. The 'Requested Date' is 01/30/2024 and the 'Enrolled Date' is 01/31/2024. Each date field has a calendar icon to its right.

12. Once complete, click *Save* to save your work.

Multiple Users Completing the TADT

The TADT screen is a living document and can be accessed multiple times by various staff. Admin and clinical staff all have access to the TADT. In some cases, agencies or programs may want their admin staff to begin the TADT form and then have the clinical staff complete it (or vice versa). The screen can be saved as users work in and out of it. The screen will need to be signed once a follow-up appointment has been entered OR once the closure section has been completed. The closure section is only completed if the screen is closed out prior to the first follow-up appointment. The following steps lay out how the screen can be started by one user and completed by a different user.

1. The first user will complete their portion of the screen and then click *Save*.

DMC-ODS Outpatient Timeliness Record

Effective: 02/28/2024 | Status: New | Author: Draper, Amanda

DMC-ODS Outpatient Timeliness Record

This is only required for Medi-Cal beneficiaries who are making an initial request for outpatient substance use disorder treatment services.

Initial Request and Appointment

Referral Source: Self | Date of First Contact to Request Services: 02/21/2024

First Service Appointment Offered Date: 02/22/2024 | First Service Appointment Rendered Date: 02/22/2024

Reason for Delay: [Dropdown]

If other, explain: [Text Area]

Referred to an out-of-network provider: Yes No

Details: [Text Area]

Follow-Up

Follow Up Appointment NOT Offered

First Follow Up Appointment Offered Date: 02/27/2024 | First Follow Up Appointment Rendered Date: [Dropdown]

2. Once the record has been saved the status will switch to In Progress. The user can close out the screen.

Effective: 02/28/2024 | Status: In Progress | Author: Draper, Amanda

3. Once ready, the second user can search for the appropriate screen. It will show as a PDF document. Click the *Edit* button to open and update the screen.

DMC-ODS Outpatient Timeliness Record

Effective: 02/28/2024 | Status: In Progress | Author: Draper, Amanda

Document

Client: Test, Mariana
ID #: 800000128
DOB: 3/3/1993

DMC-ODS Outpatient Timeliness Record | SACRAMENTO COUNTY

Effective Date: 2/28/2024

This is only required for Medi-Cal beneficiaries who are making an initial request for outpatient substance use disorder treatment services.

Initial Request and Appointment	
Referral Source:	Self
Date of First Contact to Request Services:	2/21/2024
First Service Appointment Offered Date:	2/22/2024
First Service Appointment Rendered Date:	2/22/2024
Referred to an out-of-network provider:	

4. Make any necessary updates, then click *Save*.

DMC-ODS Outpatient Timeliness Record

Effective 02/28/2024 Status In Progress Author Draper, Amanda

DMC-ODS Outpatient Timeliness Record

This is only required for Medi-Cal beneficiaries who are making an initial request for outpatient substance use disorder treatment services.

Initial Request and Appointment

Referral Source: Self Date of First Contact to Request Services: 02/21/2024

First Service Appointment Offered Date: 02/22/2024 First Service Appointment Rendered Date: 02/22/2024

Reason for Delay:

If other, explain:

Referred to an out-of-network provider Yes No

Details:

Follow-Up

Follow Up Appointment NOT Offered

First Follow Up Appointment Offered Date: 02/27/2024 First Follow Up Appointment Rendered Date: 02/27/2024

5. Once the screen has been saved, click on the *Author* drop-down. It will automatically take you to the current author's name. Scroll to the top of the list to select your name.

Author Draper, Amanda

Proxy Users

Callahan, Stacey

Staff Users

6. Once you've selected your own name the *Sign* button will become enabled. Click Sign once the document is complete.

Effective 02/28/2024 Status In Progress Author Callahan, Stacey

Sign