

Timely Access Data Tool (TADT) Tip Sheet

This Tip Sheet will walk users through the process for the TADT tools. This tip sheet may change as training is 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.

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What is the TADT?

The Timely Access Data Tool (TADT) is a tool to track timeliness. There are four TADT forms which providers could use based on clients’ needs:

- The **MH Non-Psychiatric SMHS Timeliness Record (Client)** form is used for Medi-Cal beneficiaries who are making a request for non-psychiatric specialty mental health services.
- The **MH Psychiatric SMHS Timeliness Record (Client)** form is used for Medi-Cal beneficiaries who are making a request for psychiatric specialty mental health services
- The **DMC-ODS Opioid Timeliness Record (Client)** form is used for Medi-Cal beneficiaries who are making a request for opioid use disorder treatment services.
- The **DMC-ODS Outpatient Timeliness Record (Client)** is to be used for Medi-Cal beneficiaries who are making a request for SUPT outpatient services.

These forms are required whenever a client is enrolled into a program.

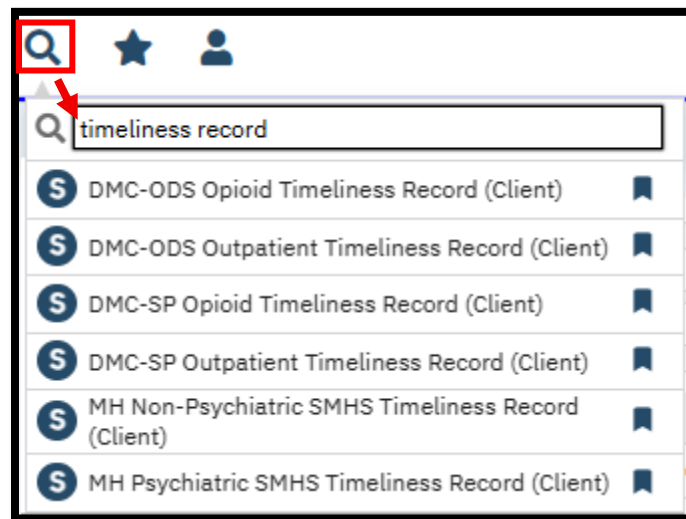
CalMHSA Steps on How to Complete a TADT

Follow the link to CalMHSA’s webpage for instructions on how to fill out the TADT form.

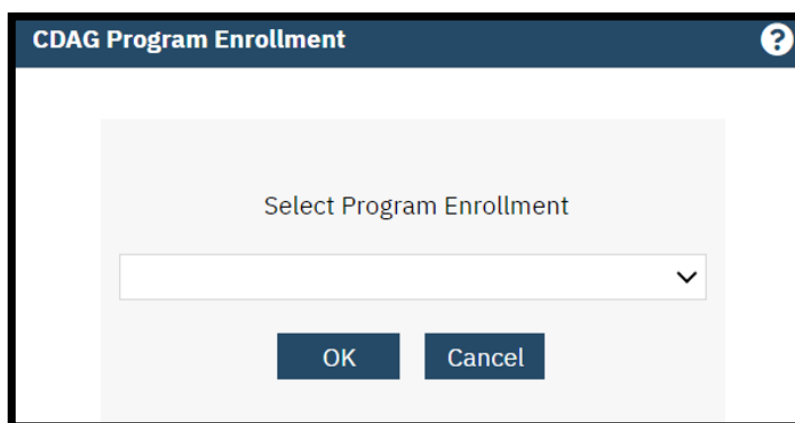
[How to Document Timely Access Record Information for TADT – 2026 CalMHSA](#)

Completing a TADT Form

1. To fill out a TADT form for a program, a client must be in a requested or enrolled status in the Client Program (client) screen.
2. Search for the keywords *"timeliness record"* in your search bar. Choose the option that is most appropriate for your program.



3. If 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.



4. This takes you into the Timeliness Record you have selected, TADT forms are a living document, they do not need to be filled out all at once.
 - a) **Enter the Referral Source.** This should be the person who referred the client to services. If the client requested services themselves, select "self".
 - b) **Enter the Date and Time of First Contact.** This is the date and time when the initial request for services was made.

- i) **If a follow-up appointment is offered, enter the First Follow Up Appointment Offered Date.** This is the first available appointment that was offered to the client after their first rendered service appointment. Much like in step d above, enter the offered date, even if the client did not accept that offered appointment.
- j) **Enter the First Follow Up Appointment Rendered Date.** This is the date the client had their first follow-up appointment. If a client accepts an appointment but doesn't show to that appointment, then a service was not rendered and that date should not be entered here. If the client never attends a first follow-up, leave this field blank and follow the instructions listed below in 7.
- k) **Offered/Rendered Timeliness** will auto populate once first follow-up appointment offered and first follow-up appointment rendered are filled out.
- l) **If the follow-up offered appointment is outside of the timeliness range,** Click **Yes** and it allows the remaining fields to be filled out. Click **No** - This will grey out the rest of the section.
- m) A record is considered complete when a client has had a first follow-up appointment rendered. At this point click Sign to complete the record. You may now close the screen.

Follow Up Appointment

Was the client offered a follow up appointment? Yes No NA H

First Follow Up Appointment Offered Date: Offered Timeliness: Business Days K

First Follow Up Appointment Rendered Date: Rendered Timeliness: Business Days

Follow Up Appointment Timeliness Standard:

Was the client delayed access to follow up services beyond the timely access standard? Yes No L

Did the provider determine and document that the extended waiting time was clinically appropriate? Yes No

Comments: *(Will not be included in state reporting file)*

- n) **Indicate whether the client was referred to an out-of-network provider.** This does not include contract providers who provide SMHS, but rather other agencies and providers who do not contract with the county. If you answer yes, provide the details of the referral.

Out-of-Network Referral

Was the client referred to an Out-of-Network provider? Yes No N



Comments: *(Will not be included in state reporting file)*



5. Sometimes a client does not complete the admission process. If a client starts the intake process but doesn't complete it (doesn't attend a follow-up appointment), then you will follow the steps below to complete the form.
 - o) In the Closure section, **enter the Closure Date**. This is the date you've determined the client will not complete the admission process.
 - p) **Enter the Closure Reason**. These reasons generally indicate which step in the process the client exited. If you select "other", enter a description of the reason in the text field indicated.
 - q) Once you've completed the closure section, **click Sign** to finalize the record. You may now close the screen.

Service Request Record Closure

Service Record Closure

This section is only required when the client does not complete the entire Access Process (receives a follow up service). The record may be closed at any point in the access process, including even before offering an initial appointment. Document the date and the reason the Access Process was ended in the fields below.

Closure Date:  

Closure Reason:  

If other, explain: (will be included on state reporting file)

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 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*.

The screenshot shows the TADT form with the following details:

- Effective:** 02/03/2026
- Status:** In Progress
- Author:** Hicks, Taylor
- Date:** 03/07/2024
- Initial Request Section:**
 - Referral Source: Self
 - Date of First Contact to Request Services: 02/01/2026
 - Time: 8:00 AM
 - Urgent: No
 - If urgent, is prior authorization required?: No
- Initial Appointment Section:**
 - First Service Appointment Offered Date: 02/02/2026
 - Time: 1:00 PM
 - Offered Timeliness: 0 Business Days
 - Hours: 0
 - First Service Appointment Rendered Date: 02/02/2026
 - Time: 1:00 PM
 - Rendered Timeliness: 0 Business Days
 - Hours: 0
 - Initial Appointment Timeliness Standard: 10 business days
 - Was the client delayed access to initial services beyond the timely access standard?: No
 - Reason for Delay: (empty)
 - If other, explain: (empty)

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

The screenshot shows the header of the TADT form with the following details:

- Effective:** 02/03/2026
- Status:** In Progress (highlighted with a red box)
- Author:** Hicks, Taylor

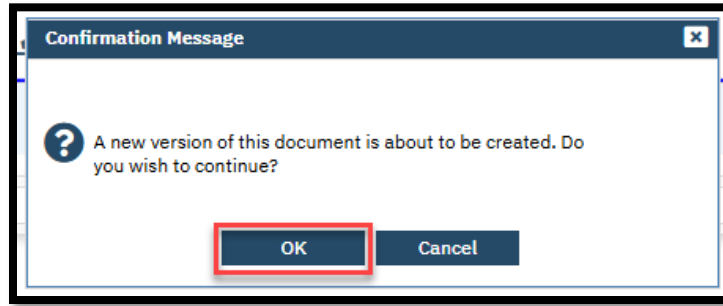
3. Once ready, with the client selected the second user can search for the TADT needing to be completed. It will show as a PDF document. Click the *Edit* button to open and update the screen.

The screenshot shows the TADT form with a PDF document viewer overlay. The PDF document is titled "MH Non-Psychiatric SMHS Timeliness Record" and contains the following information:

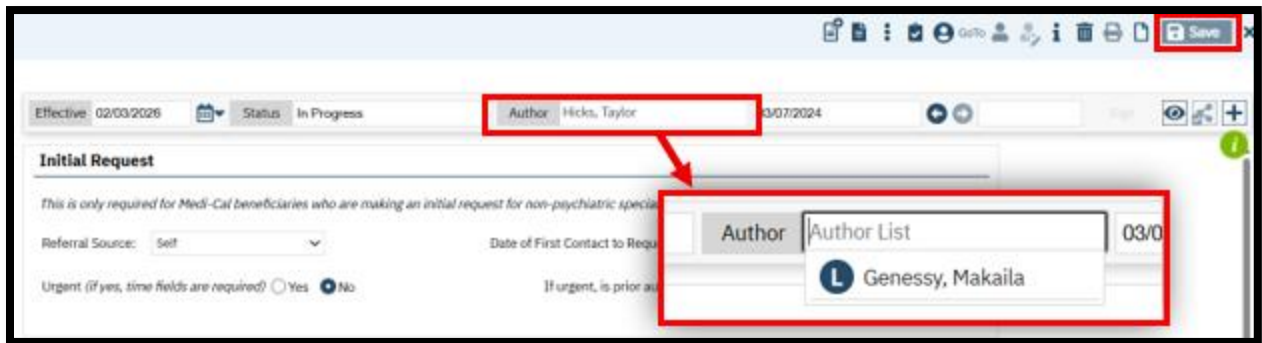
- Client:** ID #: DOB:
- Effective Date:** 2/3/2026
- Initial Request Section:**
 - Referral Source: Self
 - Date of First Contact to Request Services: 02/01/26 8:00:00 AM

The 'Save' button in the top right corner of the TADT form is highlighted with a red box.

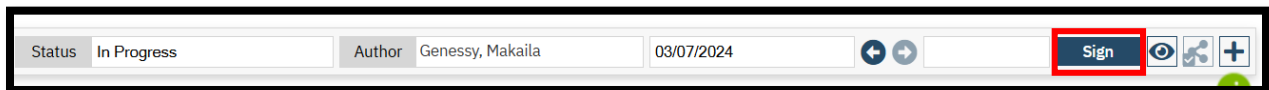
- 4. A confirmation Message pop-up will populate stating *A new version of this document is about to be created. Do you wish to continue?* Click OK



- 5. Make any necessary updates, then click *Save*.
- 6. Once the screen has been saved, click on the *Author* drop-down. Begin typing your name and it will automatically populate results, choose your name from the dropdown.



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



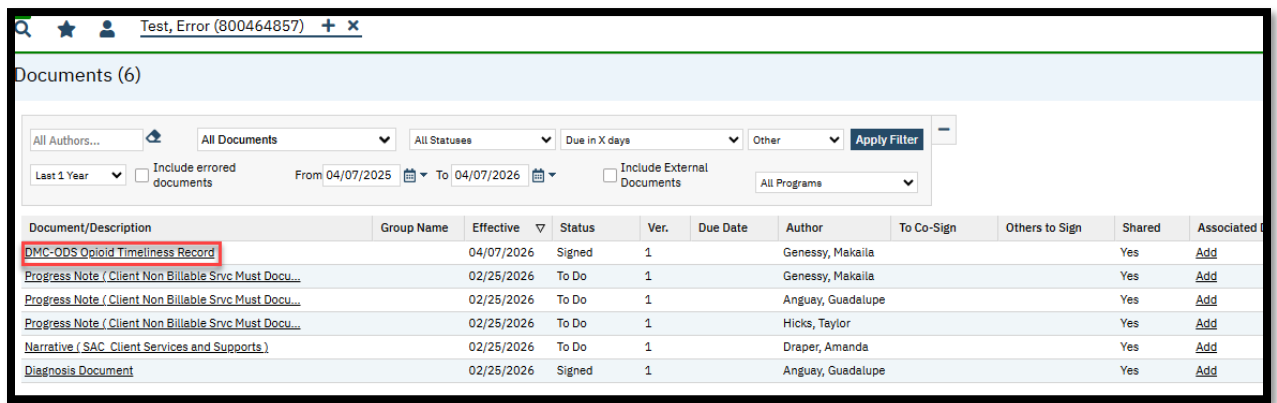
Erroring an Incorrect or Non-Applicable TADT

If a TADT needs to be removed from state reporting, it must be placed in an error status. Users can set a TADT to **error** directly within the PDF document. This preserves the document’s history in the client’s chart for auditing or review purposes, while hiding it from view unless the filter to **Include Errored Documents** is selected.

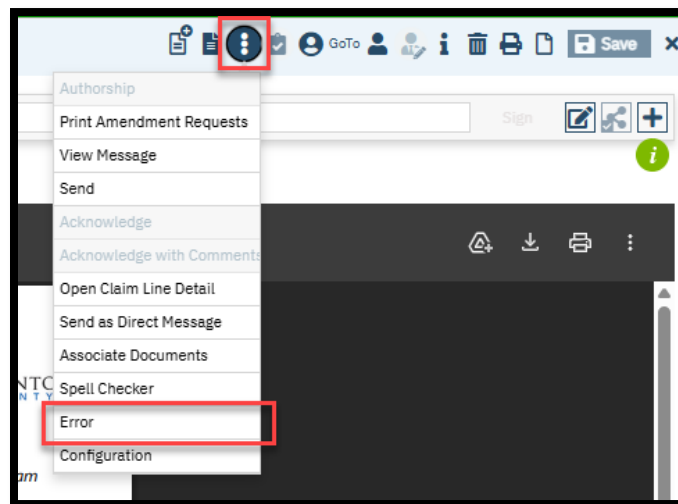
If a TADT was entered incorrectly (for example, if information was documented for the wrong client or program) and the document needs to be removed entirely from the client’s chart, users must submit a request to the EHR Support team via email to have the TADT deleted.

How to Error Out a TADT

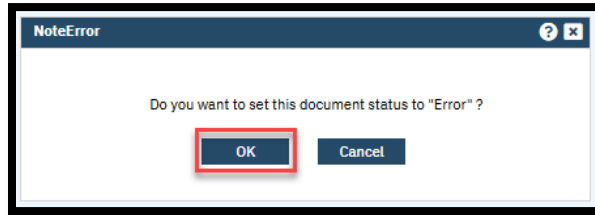
1. To error out a TADT, you’ll first need to select a client and open the *Documents (Client)* screen.
2. In the Documents (Client) screen, locate the Timeliness Record you wish to error and click the hyperlink for the document to open the PDF.



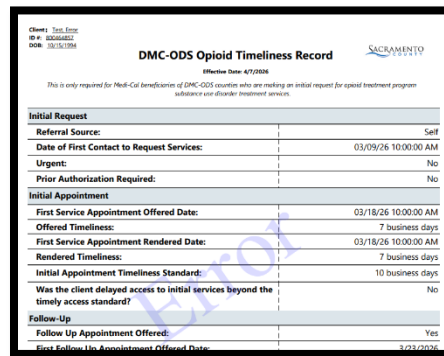
3. Within the document you’ll want to select the *select action* button in the upper right hand corner and select Error from the dropdown options.



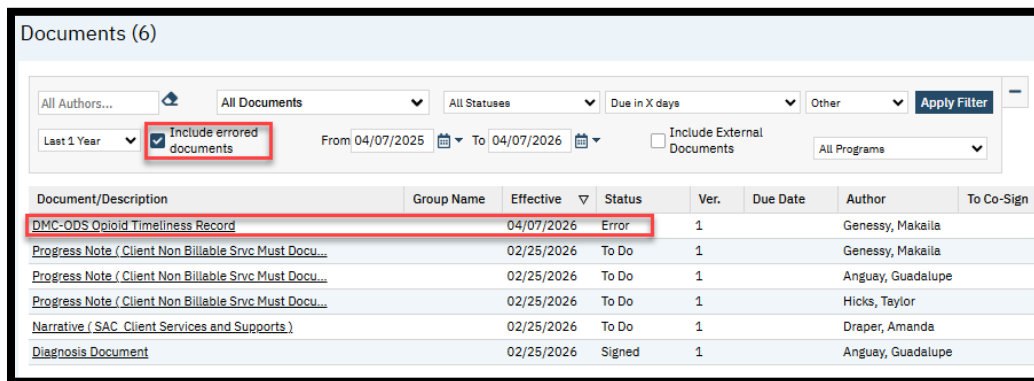
4. You will get a pop up that asks *Do you want to set this document status as error?* Select **OK**



5. This sets the document status to Error and overlays the word Error over the document.



6. This will remove the document from the documents (Client) Screen, unless a user has the filter selected to include errored documents.



How to Delete a TADT

To delete a TADT from the system, the user will need to send a request via email to the EHR Support team at bhs-ehrsupport@saccounty.gov. Please make sure to include the information **encrypted** below:

- Client Name and ID
- Document Name
- Document Effective Date
- Program