

# TEST WORKFLOW

Staff = CTI, SWII, ADC

\* OA will complete these steps until Phase II is live

Call received while staff is on site during business hours or Paper Referral received (Crisis call or CIT form comes in after hours and referral is for follow up care)

Staff will verify if caller has a Permanent MR# or P# by entering name in search field of 'My Clients' widget

Caller has MR# or P#, staff will open and complete Initial Contact Log

Caller does not have an MR# or P#, staff will open and complete Initial Contact Log Bundle

Staff will review information from the call and print MHS 140 (if available) and discuss with their SOC

Staff will respond to call to assess and contact SOC via phone to dispo and manage crisis or follow up on crisis situation

Staff will follow through with appropriate action and document utilizing paper records

Upon return to the office, staff will complete their own Scheduling Calendar

If client does not have a MR#, staff will Assign Permanent MR# to client

Staff will complete the paper version of the opening packet and submit to OA within 72 hours.

- Diagnosis Sheet
- Care Necessity
- Pink Notes
- Episode Summary
- CSI
- Initial Contact Form
- Consents

OA will audit packet and search for client in Avatar

Client has MH over-arching episode

Client has no MH over-arching episode

OA will complete:

- CSI form
- Program Assignment form
- Diagnosis form
- Update Client Data (if needed)

OA will complete:

- MH Registration Bundle
- MH Admission Bundle

SOC will review all documentation submitted and sign off

Staff will continue to provide case management, completing Progress Notes and will obtain PHI forms as needed

Once the SWII is ready to close the episode, SOC will assign task to OA who will complete closure section of Program Assignment form

OA will complete Client Charge Input to bill for services

