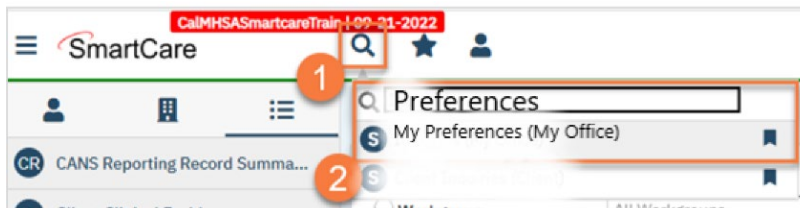


How to set your preferences so **Inquiries (My Office)** display upon signing in to SmartCare.

SmartCare search words are in **bold** throughout this guide.

Step 1 & 2

1. Search for the **Preferences** screen using the search icon.
2. Type Preferences. Select **My Preferences (My Office)**.



Step 3 - 6

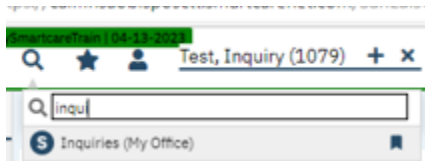
3. Go to Home Page field under General Settings.
4. Click drop down and select **Inquiries**.
5. Confirm your password.
6. Click Save and X to close. In the future, upon signing in to SmartCare, the **Inquiries (My Office)** screen will display on your **Staff Dashboard**.

A screenshot of the "My Preferences" form in the SmartCare application. The form is divided into several sections: Account, Contact, Image Server, Location, Preferences, Security Questions, and General Settings. The "General Settings" section is highlighted with a red box and a red circle with the number 3. Within the "General Settings" section, the "Home Page" dropdown menu is open, showing "Inquiries" as the selected option. A red circle with the number 4 is next to this dropdown. The "Confirm Password" field is highlighted with a red box and a red circle with the number 5. The "Save" button is highlighted with a red box and a red circle with the number 6. The "X" button is also visible next to the "Save" button.

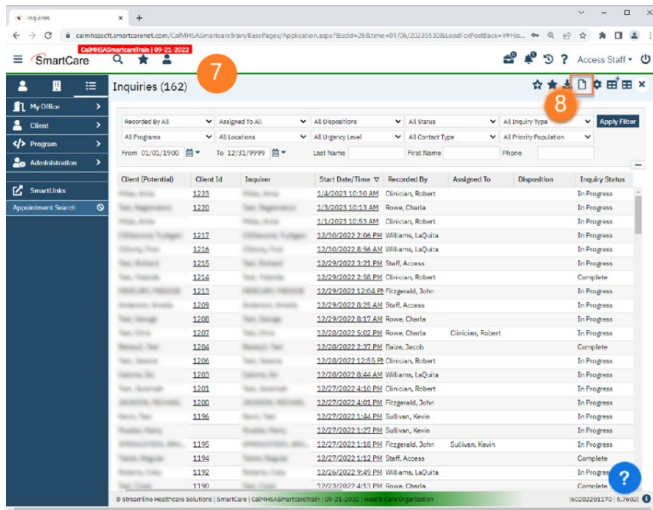
Example of Inquiry: How do I document a request for services received via the Access Line?

Step 7 & 8

7. Go to search and type in **Inquiries** and select **Inquiries (My Office)**.



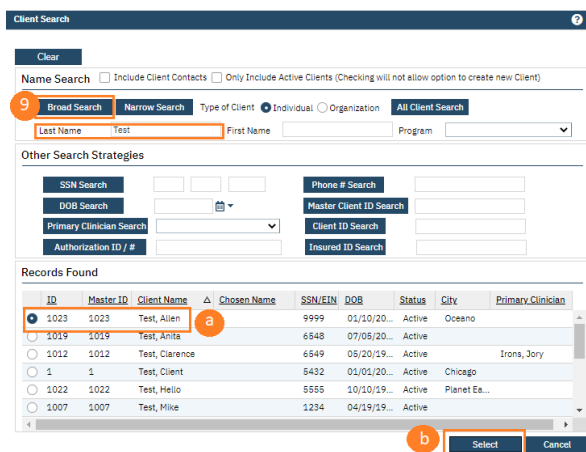
8. Create a new inquiry by clicking the new button.



Step 9 (a-c)

9. This will open the client search window. You may search to determine if the person is a current client.

- To search for a client, enter their name and click “Broad Search.” You can also search by SSN by entering their social security number and clicking “SSN Search.” You can do the same with date of birth (DOB), phone number, etc.
- If you find the person in the system, meaning they show in the Records Found section, click the radial button to the left of their name, then click “Select” to bring their information into the Inquiry screen.



- c. If a person is a new client, or you cannot find them in the system, click “Inquiry (New Client)”.

Clear No Search Records Found C

Name Search ☐ Include Client Contacts ☐ Only Include Active Clients (Checking will not allow option to create new Client)

9 Broad Search Narrow Search Type of Client ☒ Individual ☐ Organization All Client Search

Last Name New First Name Program

Other Search Strategies

SSN Search Phone # Search

DOB Search Master Client ID Search

Primary Clinician Search Client ID Search

Authorization ID / # Insured ID Search

Records Found

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
No data to display								

C Inquiry (New Client)

Step 10 (a-c)

10. This brings you to the Inquiry Details screen. Complete the information about the caller, or “Inquirer”.

- If the client is calling for themselves, select “Self” under “Relation to Client.” This way, as you enter the caller’s information, it will push this information automatically into the “Client Information” section.
- Enter the client’s call back phone number.
- Make sure to input the start date and time of the call. There are buttons for today “T” and “Now” to help make this quick and easy.

Inquiry Details Remove Client Link Link/Create Client

Initial Insurance Demographics

Inquirer Information ☐ Crisis 10

a-c Relation To Client Self First Name Inquiry Middle Name Last Name Testy

Call Back (805) 867-5309 Ext Email

Start Date 05/31/2023 T Y Start Time 12:08 PM Now

Client Information (Potential)

First Name Inquiry Middle Name Last Name Testy Client ID Sex Male

SSN ☐ SSN Unknown/Refused DOB Age

Home Phone (805) 867-5309 Cell Email

Address1 1234 Main Street Urgency Level Not urgent i

Address2 Inquiry type Request for MH services

City Arroyo Grande Contact type Face to Face

State California Zip 93420

Presenting Problem Current Client Information (If any)

Step 11 (a-e)

11. Complete the information about the potential client.

- Complete the First Name and Last Name fields. Middle Name is not required but can be added if given.
- Complete the SSN and DOB fields. This is for the client's social security number (SSN) and date of birth (DOB), respectively. If the client refuses to share, or does not know, you can simply check the box "SSN Unknown/Refused." Once saved, this will fill in the SSN with "999999999", which is SmartCare's version of "no SSN".
- Complete the Sex field.
- Complete the Urgency Level, Inquiry type, and Contact type fields. The options for each field are listed in the tables below. This includes a description of when to use each option.
- You can enter additional phone numbers and address information. Click Save when done.

The screenshot shows the 'Inquiry Details' form in the SmartCare system. The form is divided into several sections: 'Inquirer Information', 'Client Information (Potential)', and 'Presenting Problem'. The 'Client Information (Potential)' section is highlighted with a red box and contains several fields and dropdown menus. Annotations a-e are placed on the form to indicate the steps to complete the client information.

Inquirer Information ☐ Crisis

Relation To Client: Self First Name: Manual Middle Name: Last Name: Training

Call Back: (916) 555-7878 Ext: Email:

Start Date: 01/06/2023 Start Time: 05:16 PM

Client Information (Potential)

First Name: Manual Middle Name: Last Name: Training Client ID: Sex: Male

SSN: ☒ SSN Unknown/Refused DOB: 06/07/2002 Age (20 Years) Medi-Cal ID:

Home Phone: (916) 555-7878 Cell: Email:

☐ Client is not homeless ☐ Client is homeless ☐ Client is chronically homeless

Address1: Address2:

City: State: Zip:

Priority Population: County of Residence: Search here

Urgency Level: Not urgent

Inquiry type: Request for services/screening

Contact type: Call

Presenting Problem:

Current Client Information (If any):

Client Can Legally Sign ☐ Yes ☐ No

Annotations: 11 (top left), a (First Name), b (SSN), c (Sex), d (Urgency Level), e (Save button)

Urgency Level	Description/Use Case	Timelines
Emergent	Use if the call is an emergency	Addressed immediately
Not Urgent	Use if the call is a routine request for services	Appointment within 10 business days
Urgent	Use if the call is an urgent request	Appointment within 72 hours

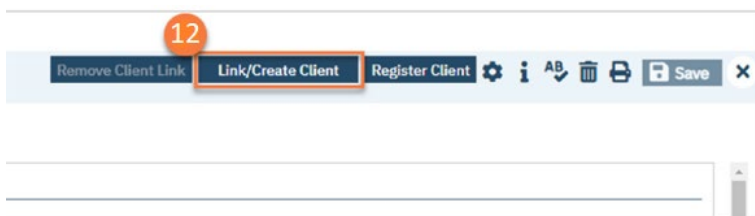
Inquiry Type	Description/Use Case
Requests for services/screening	Use when the reason for the call is a request for new services
Crisis	Use when the reason for the call is for crisis services
Information	Use when the reason for the call is for information
Discharge/Transition Coordination	Use when the reason for the call is for another provider to coordinate transition of care to/from your agency
Jail Diversion	Use when the reason for the call is related to Jail Diversion programs
Consultation	Use when the reason for the call is for an outside provider seeking a consultation
Other	Use when the reason for the call is not addressed by any of the above

Contact Type	Description/Use Case
Call	Use when the inquiry was complete via telephone
Face to Face	Use when the inquiry was completed via in-person, such as a walk-in
Form	Use when the inquiry was completed via form, such as a referral that was sent to the county

Teleconference	Use when the inquiry was complete via teleconference, such as Zoom, FaceTime, Webex, or other video-audio conferencing software
----------------	---

Step 12 (a-h)

12. Select the “Link/Create Client” button. This will bring up the client search window.



- You must search by name by clicking on either “Broad Search” or “Narrow Search”.
- You must also search by SSN and DOB by clicking on those respective buttons.
- If no records are found based on the search you do, an alert will show at the top of the window.

Client Search [?] [X]

Clear

Name Search ☐ Include Client Contacts ☐ Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search **Narrow Search** Type of Client ☒ Individual ☐ Organization **All Client Search**

Last Name First Name Program

Other Search Strategies

SSN Search **Phone # Search**

DOB Search **Master Client ID Search**

Primary Clinician Search **Client ID Search**

Authorization ID / # **Insured ID Search**

Records Found

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
No data to display								

Select **Cancel** **Create New Client Record**

Client Search [?] [X]

Clear **No Search Records Found**

Name Search ☐ Include Client Contacts ☐ Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search **Narrow Search** Type of Client ☒ Individual ☐ Organization **All Client Search**

Last Name First Name Program

Other Search Strategies

SSN Search **Phone # Search**

DOB Search **Master Client ID Search**

Primary Clinician Search **Client ID Search**

Authorization ID / # **Insured ID Search**

Records Found

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
No data to display								

Select **Cancel** **Create New Client Record**

- d. Any search results will show in the “Records Found” area. Review the Records Found to determine if the person is already in the system as a client.
- e. If the person is already a client in the system, select the button next to the appropriate record.
- f. Click “Select” to link the Inquiry to the selected client.
- g. If the person is not a client, meaning no records were found matching the client’s information, click “Create New Client Record.”

Client Search

Clear

Name Search ☐ Include Client Contacts ☐ Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search **Narrow Search** Type of Client ☒ Individual ☐ Organization **All Client Search**

Last Name First Name Program

Other Search Strategies

SSN Search **Phone # Search**

DOB Search **Master Client ID Search**

Primary Clinician Search **Client ID Search**

Authorization ID / # **Insured ID Search**

Records Found

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
1234	1234	Agnes Thomas		9999	08/29/19...	Active		
1081	1081	Andrew Allen		9999	09/17/19...	Active		
1072	1072	Andrew Allen		9999	03/03/19...	Active		
1209	1209	Andrew Allen		9999	10/10/19...	Active	heavyton	
1096	1096	Andrew Allen		9999	08/01/19...	Active		Clinician, Robert
1007	1007	Andrew Allen		9999	05/27/19...	Active	Test	

Select Cancel

Create New Client Record

h. This will take you back to the Inquiry screen but now a client ID number will be added.

Inquiry Details Guide Menu Remove Client Link Link/Create Client Register Client

Initial Insurance Demographics

Inquirer Information ☐ Crisis

Relation To Client First Name Middle Name Last Name

Call Back Ext Email

Start Date Start Time Now

Client Information (Potential)

First Name Middle Name Last Name **Client ID** Sex

SSN ☒ SSN Unknown/Refused DOB Age (20 Years) Medi-Cal ID

Home Phone Cell Email

☐ Client is not homeless ☐ Client is homeless ☐ Client is chronically homeless

Urgency Level

Address1 Inquiry type

Address2 Contact type

City Priority Population

State Zip County of Residence

Presenting Problem

Current Client Information (If any)

Client Id: 1239
Last Inquiry Date:
Coverage History
No Coverage History

Client Can Legally Sign ☐ Yes ☐ No

Step 13 (a - g)

13. Click on the “Insurance” tab.

- a. Select “Medi-Cal” from the “Payer” drop-down and enter the client’s Medi-Cal number (CIN) in the “Insurance ID” field. Click “Verify” to verify the client’s Medi-Cal insurance.

Inquiry Details

Remove Client Link Link/Create Client Register Client Save

Initial **Insurance** Demographics

Electronic Eligibility Verification

Payer Insurance ID Verify...

Coverage Information ☒ Show Current Plans Only

Plan	Insured ID	Group ID	Comment
Coverage Information			

Add

- b. The Insurance Eligibility Verification screen opens. Click Submit Request.

Insurance Eligibility Verification

Print Response

Close

Insurance Eligibility Verification

Request

Response

Coverage Plan

Electronic Payer

Madi-Cal

Payer Id

610442

Insured Information

First Name

Kitty

Last Name

Cat

SSN

562562145

Insured Id

90817445D

Date Of Birth

04/26/2001

Sex

Female

Group Number

Client Information

Relationship to the Insured

Self

First Name

Kitty

Last Name

Cat

Date Of Birth

04/26/2001

Sex

Female

Date Range

Start and End date range cannot be greater than days

Start Date

05/10/2023

End Date

05/10/2023

Submit Request

- c. Click the **Update Coverage** button to automatically update the client's Medi-Cal coverage.

[illegible]

Click the Response tab to view and/or print the response. Scroll down to view additional benefits and client information. Click close to exit this screen.

Additional insurance information can be added in the Plan field in the Coverage Information section.

- d. Select the plan from the drop-down and enter in Insured ID#.
- e. Click Add.
- f. Click Save.

Step 14 (a-c)

14. Click on the “Demographics” tab

- a. We recommend completing the “Gender Identity” and “Pronoun” fields to ensure the person is not misgendered as additional staff engage with the client.
- b. Complete the “Primary/Preferred Language” field. If the client does not speak English or requires an interpreter, make sure to check the appropriate checkbox.
- c. If the client has any transportation issues and will need transportation to and/or from appointments, check the Transportation Service checkbox.
- d. You may enter any additional information in any of the tabs (such as communication preference, day(s) of the week availability/preferred, or location preference), but none are required.

Inquiry Details Remove Client Link Link/Create Client Register Client AB Print Save X

Initial **Insurance** **Demographics** 14

Identifying Information (Optional)

Gender Identity Male Pronoun He a Sexual Orientation

Language

Primary/Preferred Language English Client does not speak English Interpreter Services Needed b

Transportation Information

☐ Transportation Service
Note any special needs accommodations (e.g. wheelchair, service animal, high rise) c

Preferences

Communication Preference Days ☐ M ☐ T ☐ W ☐ Th ☐ F Geographic Location d

Step 15 (a-b)

15. Go back to the Initial tab.

- Assign Inquiry to BH Specialist who will be handling the screening.
- Click Save and X to close.

Inquiry Details Remove Client Link Link/Create Client Register Client AB Print Save X

Initial **Insurance** **Demographics** 15 b

Inquiry Handled By

Recorded By Swammy, Kimberly Information Gathered By So Co, Test Front Office

Program Gathered By Other a

Location Assigned To Munoz, Claudia

Disposition

Select Disposition Select Service Type Select Provider/Agency Add Provider

Step 16 (a-f)

16. With the client open, go to search bar. Type in **Client Programs** and select **Client Programs (Client)**.

16 TestCH, Client (1080) + X

Client Prog

Client Programs (Client)

Summary

- a. Click new.

Client Programs (0)

Program	Status	Enrolled	Discharged	Assigned Staff	Primary	Last DOS	Next DOS
No data to display							

- b. In the Program Name field, select "SLO MC Authorizations Adult/Youth".
- c. In Assigned Staff, select Managed Care Program Supervisor.
- d. In Current Status field, select "Enrolled".
- e. Enter in Enrolled Date (same date as Inquiry).
- f. Click Save and X to close.

Program Assignment Details

Program Assignment

General

SLO MC Authorizations Adult
 ☐ Primary
 Enrolled

Test, Allen
 Hansen, Carrie Lynn

05/01/2023

Step 17 (a-d) (BH Specialist to complete)

17. Go to **Inquiries (My Office)** and search for pending Inquiries that have been assigned to you for screening.
 - a. To see pending Inquiries that have been assigned to you, go to the "assigned to all" field and select your name from the drop down.
 - b. Go to the "all statuses field" and change to "In Progress".
 - c. Click Apply Filter.
 - d. Click the Start Date/Time link to open the Inquiry.

Inquiries (1)

Seaman, Kimberly
 In Progress

01/01/1900
 12/31/9999

Client (Potential)	Client Id	Inquirer	Start Date/Time	Recorded By	Assigned To	Disposition	Inquiry Status	Program Name	Location
Test, Allen	1023	Test, Allen	5/1/2023 9:13 AM	Seaman, Kimberly	Seaman, Kimberly		In Progress		

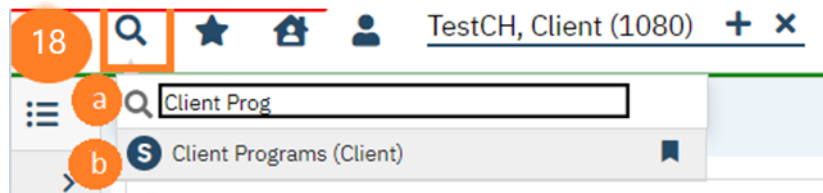
Step 18 (a-g) (BH Specialist to complete)

Once the screening clinician has completed the screening tool and caller will be moving on for services, the screening clinician will need to open the clinic intake program where they want to schedule the BH Assessment.

- MH- If an assessment appointment was offered and declined, and the caller will not be moving on for services, launch the MH Non-Psychiatric SMHS Timeliness Record. Begin and end the MH Non-Psychiatric SMHS Timeliness Record entry with this closure reason.
- MH- If an assessment appointment was offered and accepted, launch the MH Non-Psychiatric SMHS Timeliness Record add the referral source, the date of First Contact to Request Services, and the First Service Appointment Offered Date. If Urgent marked, you must include times with date. If the first service offered is outside of ten-day window, the reason for delay must be entered; this is usually “No Available Provider.” After these fields are completed, sign, and change Author to Clinic Health Information Technician (HIT).
- SUD - If an assessment appointment was offered, launch the DMC-ODS Outpatient Timeliness Record. Add the referral source, the date of First Contact to Request Services, and the First Service Appointment Offered Date. After these fields are completed, sign, and change Author to Clinic Health Information Technician (HIT).

With the client open, go to the search icon.

- Search **Client Programs**.
- Select **Client Programs (Client)**.



- Click new.

Client Programs (1)

Filter icons: [Close] [Star] [Star] [Download] [Print] [X]

18

a

b

c

Program Name	Status	Enrolled	Discharged	Assigned Staff	Primary	Last DOS	Next DOS
SLO MC Authorizations ...	Enrolled	05/01/2023		Hansen, Carrie ...	No		

- In the Program Name field, select the appropriate Intake program.
- In Current Status field, select “Requested”.
- Enter Requested Date (date you are putting into intake program).
- Click Save and X to close.

How to Add Reoccurring Events to Staff Calendar (AA function)

Note: this needs to be done before available appointments are shown on the Appointment Search screen.

Search **Staff Calendar** and select **Staff Calendar (My Office)**.

Select Single-Staff View and Staff.

Click and drag your mouse to the desired start date and time of the reoccurring appointment.

Select New Calendar Entry and click OK.

In this window, you need to enter the subject and the location (office or telehealth.)

Confirm start and end times are correct.

Choose Intake as the appointment type and select Free for “show time as”.

Select recurrence.

Enter the recurrence preferences. We recommend if specifying an end by date, to not go more than 6 months into the future.

Once done, click OK.

Scheduler Event

Add

Subject: Intake
Location: Office
Start Time: 6/05/2023 01:00 PM
Appointment Type: Intake
End Time: 6/05/2023 03:00 PM
Show Time As: Free
All day Event: ☐

☒ Recurrence ☐ Do Not Update Exception(s)

☐ Daily
☒ Weekly
☐ Monthly
☐ Yearly

Recur every 1 week(s) on:
☐ Sun ☒ Mon ☒ Tue
☐ Wed ☒ Thu ☐ Fri ☐ Sat

Start: 6/05/2023
☐ No end date
☐ End after 1 occurrences
☒ End by 12/05/2023

OK Cancel Delete

This is how it will be displayed on the Staff's calendar.

Staff Calendar

Single-Staff View Maa, Generic 15 Minutes Intervals Single Staff Showing 1-1/1 Apply Filter

Today Day Week Month Refresh Apr 30 2023 - May 6

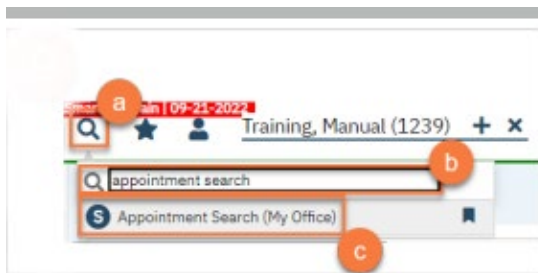
Maa, Generic

	SUN 4/30	MON 5/1	TUE 5/2	WED 5/3	THU 5/4	FRI 5/5	SAT 5/6
10:00 AM				C 10:00 AM - 12:00 PM Intake	C 10:00 AM - 12:00 PM Intake	C 10:00 AM - 12:00 PM Intake	
11:00 AM							
12:00 PM							

Step 19 (A-i) (BH Specialist to complete)

With the client record open:

- Click the Search icon.
- Type **Appointment Search** into the search bar.
- Click to select **Appointment Search (My Office)**.



- d. Use the filters to limit the search to intake appointments and any other requests the client has, such as client's availability. Then click Search.

This screenshot shows the 'Appointment Search' form. It contains various filters such as Plan, Service Area, Programs, Location, Staff, License, Sex, Speciality, Category, and Allow Overbooking Up to. There are also checkboxes for 'Only show time slots marked as Free' and 'Ignore Age Range Preference'. The 'Appt. Type' is set to 'Intake' and the 'Start Date' is '01/09/2023'. A 'Search' button is highlighted with a red circle labeled 'd'.

- e. This will bring up a list of available appointments. If the client declines the first offered appointment, click on the X (Client Refuses Appointment) icon. This will be used for tracking timeliness.

Note: you only need to decline 1 appointment per day. In the below example, there are 3 available appointments on 1/9/23 and 3 available appointments on 1/10/23. You would only need to decline one of these appointments on each date, so you would only decline 2 total appointments, not all 6.

This screenshot shows the 'Appointment Search (26)' results table. The table has columns for Staff Name, Date/Time, Duration, Type, and Location Name. The first column contains a red X icon, which is highlighted with a red circle labeled 'e'. The table lists several appointments for 01/09/2023 and 01/10/2023.

Staff Name	Date/Time	Duration	Type	Location Name
Stephan, Kristy	01/09/2023 8:00 AM	120 mins	Intake	
Clinician, Robert	01/09/2023 8:00 AM	120 mins	Intake	
Clinician, Robert	01/09/2023 1:00 PM	180 mins	Intake	
Stephan, Kristy	01/10/2023 8:00 AM	120 mins	Intake	
Clinician, Robert	01/10/2023 8:00 AM	150 mins	Intake	

- f. Clicking on the X (Client Refuses Appointment) icon will bring up a pop-up window. Enter the Refusal Reason and then click "OK".



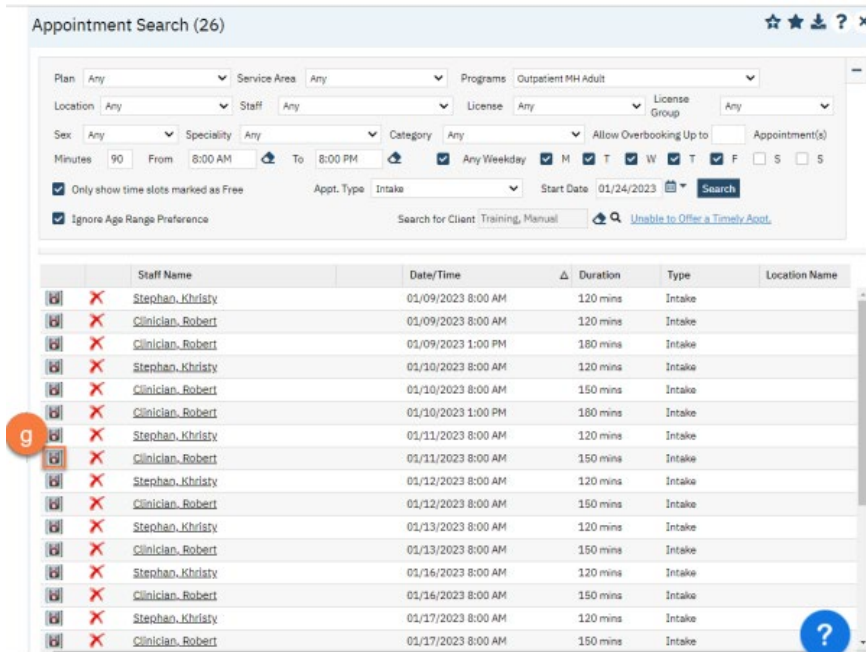
Refusal Reason

Refusal Reason

OK Close

Specify if Other

g. For the appointment that the client chooses, click on the “Schedule Appointment” icon.



Appointment Search (26)

Plan: Any Service Area: Any Programs: Outpatient MH Adult

Location: Any Staff: Any License: Any License Group: Any

Sex: Any Speciality: Any Category: Any Allow Overbooking Up to: Appointment(s)

Minutes: 90 From: 8:00 AM To: 8:00 PM Any Weekday: ☒ M ☒ T ☒ W ☒ T ☒ F ☐ S ☐ S

☒ Only show time slots marked as Free Appt. Type: Intake Start Date: 01/24/2023 Search

☒ Ignore Age Range Preference Search for Client: Training, Manual [Unable to Offer a Timely Appt.](#)

	Staff Name	Date/Time	Duration	Type	Location Name
☒	Stephan_Khristy	01/09/2023 8:00 AM	120 mins	Intake	
☒	Clinician_Robert	01/09/2023 8:00 AM	120 mins	Intake	
☒	Clinician_Robert	01/09/2023 1:00 PM	180 mins	Intake	
☒	Stephan_Khristy	01/10/2023 8:00 AM	120 mins	Intake	
☒	Clinician_Robert	01/10/2023 8:00 AM	150 mins	Intake	
☒	Clinician_Robert	01/10/2023 1:00 PM	180 mins	Intake	
☒	Stephan_Khristy	01/11/2023 8:00 AM	120 mins	Intake	
☒	Clinician_Robert	01/11/2023 8:00 AM	150 mins	Intake	
☒	Stephan_Khristy	01/12/2023 8:00 AM	120 mins	Intake	
☒	Clinician_Robert	01/12/2023 8:00 AM	150 mins	Intake	
☒	Stephan_Khristy	01/13/2023 8:00 AM	120 mins	Intake	
☒	Clinician_Robert	01/13/2023 8:00 AM	150 mins	Intake	
☒	Stephan_Khristy	01/16/2023 8:00 AM	120 mins	Intake	
☒	Clinician_Robert	01/16/2023 8:00 AM	150 mins	Intake	
☒	Stephan_Khristy	01/17/2023 8:00 AM	120 mins	Intake	
☒	Clinician_Robert	01/17/2023 8:00 AM	150 mins	Intake	

h. This takes you to the Service Detail screen. Confirm/edit the appointment information. You can also note if the person needs transportation or interpretation services.

i. Once complete, click Save and X to close. The appointment is now scheduled.

Service Detail h

Regenerate Charge Save i

Service Detail **Billing Diagnosis** Authorization(s) Disposition

Service

Client... Training, Manua... Status Scheduled Start Date 01/16/2023 Program Outpatient MH Adult

Procedure Mental Health Assessment by Non-Physi... Modifier... Start Time 10:30 AM Total Duration 90 Minutes

Clinician Name Clinician, Robert End Date 01/16/2023

Location Office Attending Referring

☒ Client was present Other Person(s) Present Cancel Reason

Group... Charge \$234.90 Balance Rate ID 275

☒ Billable ☐ Do Not Complete

Mode Of Delivery Face-to-face

Travel Time Minutes Note

Face to Face Time Minutes

Documentation Time Minutes

Evidence Based Practices Override Charge Amount Overridden By

Override Errors Overridden By

Transportation Service No ☐ Interpreter Services Needed

Step 20 (a-j) (BH SPECIALIST TO COMPLETE)

You will now need to go back to the intake program and add staff that will be performing the assessment.

- a. Search **Client Programs**.
- b. Select **Client Programs (Client)**.

20 a b TestCH, Client (1080) + x

Client Prog

Client Programs (Client)

- c. Find the intake program and click on the Requested link.

Client Programs (2)

All Programs All Statuses Other Apply Filter

Program Name	Status	Enrolled	Discharged	Assigned Staff	Primary	Last DOS	Next DOS
SLO MC Authorizations ...	Enrolled	06/01/2023		Hansen, Carrie ...	Yes		06/08/2023 11:00 AM
SCA Clinic Intake Adult	Requested C				No		06/16/2023 11:00 AM

- d. Enter assigned staff.
- e. Click Save and X to close.

Program Assignment Details

Program Assignment

General

Program Name: SCA Clinic Intake Adult ☐ Primary Current Status: Requested

Client: Test, Inquiry

Assigned Staff: Weissman, Jennifer Dawn **d**

Comment:

Requested Date: 06/02/2023
 Enrolled Date:
 Discharged Date:
 Next Schedule Service: 06/16/2023 11:00 AM

e Save X

f. Next find the SLO MC Authorizations Adult/Youth program assignment and click on Enrolled link.

Client Programs (2)

All Programs All Statuses Other Apply Filter

Program Name	Status	Enrolled	Discharged	Assigned Staff	Primary	Last DOS	Next DOS
SLO MC Authorizations ...	Enrolled f	06/01/2023		Hansen, Carrie ...	Yes		
SCA Clinic Intake Adult	Requested			Weissman, Jen...	No		06/16/2023 11:00 AM

g. Change status from enrolled to discharged.

h. Enter discharge reason.

i. Enter discharge date.

j. Click Save and X to close.

Program Assignment Details

Program Assignment

General

Program Name: SLO MC Authorizations Adult ☒ Primary **g-h**

Client: Test, Inquiry

Assigned Staff: Hansen, Carrie Lynn

Comment:

Current Status: Discharged **g-h**

Discharge Reason: Administrative discharge **g-h**

Requested Date:

Enrolled Date: 06/01/2023 **i**

Discharged Date: 06/01/2023 **i**

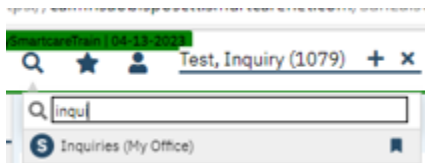
Next Schedule Service:

j Save X

Step 21 (a-e) (BH SPECIALIST TO COMPLETE)

(If caller will be referred to CenCal, notate in the Disposition comments, remove your name from the Inquiry and assign Inquiry to MC HIT to process and end/complete the Inquiry.)

21. Go to search and type in **Inquiries** and select **Inquiries (My Office)**.



Locate and open the Inquiry. Enter any clinical information, enter in the disposition, then end and complete the Inquiry.

- Select the program where the appointment will take place.
- Select location of appointment
- Enter disposition.
- Select T for today which enters the end date. Select Now, which enters the end time. Change status from In Progress to Complete.
- Click Save and X to Close.

A screenshot of the 'Inquiry Details' form in a web application. The form has several sections: 'Inquiry Handled By', 'Disposition', and a bottom section for dates and status. Orange boxes and letters highlight specific areas: 'a' points to the 'Program' dropdown menu; 'b' points to the 'Location' dropdown menu; 'c' points to the 'Add Service Type' link; 'd' points to the 'Disposition Comments' text area; 'e' points to the 'Save' button in the top right corner. The 'Disposition' section includes dropdowns for 'Select Disposition', 'Select Service Type', and 'Select Provider(Agency)'. The bottom section includes 'End Date' (05/31/2023), 'End Time' (08:18 AM), and 'Status' (Complete).