

SUD Timely Access Guide

DHCS requires that BHS track timely access to all SUD treatment programs. They are specifically interested in the first available appointment that we can offer the client, even if that time slot does not work for the client.

The Timely Access form is used when the client is not admitted to the program.

The Timely Access form can be used without registering the client in Avatar.

This document will provide guidance on the following topics,

- When to use Timely Access
- How to locate/search for the form
- How to navigate/document in the form
- How to locate/run associated report (s)
- How to get additional help/guidance

The screenshot displays the 'Timely Access' form interface. On the left is a sidebar with a 'Timely Access' header, a 'Submit' button, and several icons. The main form area is divided into sections: 'First Request for Services' with a date/time picker and a 'Walk-in / Call-in Time' dropdown; 'Registered Client Name' with a text field and a 'Check this box if client is not registered' checkbox; 'Type of Service Requested' with radio buttons for 'Outpatient', 'SUD Residential', and 'Withdrawal Mgmt'; 'Appointment Date Offered' with a date/time picker and a 'Select Outpatient Program' dropdown; 'Appointment Type' and 'Primary Language' dropdowns; 'Select SUD Residential Program' and 'Select Withdrawal Mgmt Program' dropdowns; a 'Rationale' text area with a note about appointment requirements; a 'Notes' text area; and 'Placement Issues' with checkboxes for 'History of Violence', 'Threatening/Hostile/Aggressive', 'Active Substance Use', 'Wandering', 'Other', 'Assault', 'Sexually Acting Out', 'Self-Harm', 'Medication Non-Compliance', 'Arson', 'History of Verbal Abuse', 'Language', and 'Refuses Level of Care'.

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When to Use Timely Access:

Use this form whenever a potential client is seeking services at your program.

The date of “First Request for Services” is the date the potential client or court appointed legal guardian (someone who can legally sign a consent form on behalf of client) requests services.

This form is not intended to capture the date of referral. For example, you would not enter the date that TAP (or any other entity or program) refers the client to your program.

In most cases, the client consents to their own treatment. Here are examples when a legal guardian is involved.

- The client is a minor and does not qualify for minor consent. In these cases, the parent or foster parent is legally able to consent for treatment.
- If the client is gravely disabled and has an appointed conservator, the conservator is legally able to consent for treatment.

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How to locate Timely Access:

In the Avatar Search Forms box, type 'Timely Access' and select it from the drop down list.

The screenshot shows the Avatar Search Forms interface. The 'Search Forms' box contains the text 'timely access'. Below the search box, a table lists the search results:

Name	Menu Path
Timely Access	Avatar PM / New Forms
Timely Access Reports (Management)	Avatar PM / New Forms
Timely Access Report (Program)	Avatar PM / New Forms
Timely Access and Access Call Log Report	Avatar PM / New Forms

The first row, 'Timely Access', is highlighted with a red border. The interface also includes sections for 'My Clients', 'My Forms', 'Recent Forms', and 'My Calendar'.

Next, there is a prompt to enter your name. Enter your first or last name in the search box located at the top of this window. Locate you and single click on your name from the drop down results. Click on the 'Select' button to proceed to Timely Access.

The screenshot shows the 'Select UserID/User Description' dialog box. The search box contains the text 'Adam'. Below the search box, a list of results is displayed:

- Adam A
- Adam E
- Adam F

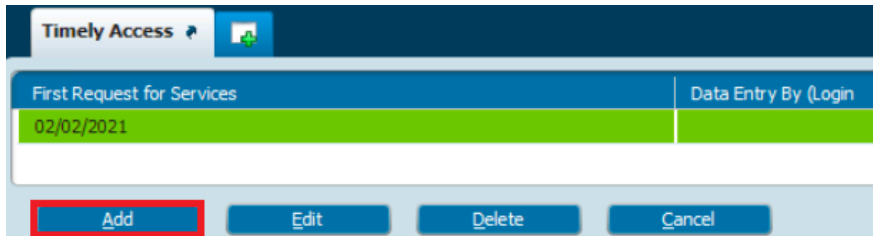
The 'Adam F' result is highlighted with a green background. At the bottom of the dialog box, there are three buttons: 'Select', 'New UserID/User Description', and 'Cancel'. The 'Select' button is highlighted with a red border.

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How to locate Timely Access (continued):

Timely Access will now display (as shown on page 1 of this document).

However, if you have completed a previous entry in Timely Access, you will first see the window below which lists all your previous entries.



The screenshot shows a web application window titled "Timely Access". Below the title bar is a table with two columns: "First Request for Services" and "Data Entry By (Login)". The table contains one row with the value "02/02/2021" in the first column and an empty cell in the second. Below the table is a light blue bar containing four buttons: "Add", "Edit", "Delete", and "Cancel". The "Add" button is highlighted with a red border.

First Request for Services	Data Entry By (Login)
02/02/2021	

Buttons: Add, Edit, Delete, Cancel

To proceed to Timely Access from here, click on the "ADD" button located at the bottom of this window (shown above).

The other buttons available here are,

- Edit will allow you to correct information in the selected entry.
- Delete will remove the selected entry.
- Cancel will return you to the Avatar Homeview.

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How to Use Timely Access (Form Navigation):

There is a specific way to successfully navigate through Timely Access. Begin by completing the top section of the form before moving down to the next section. Complete fields on the left side before moving to the fields on the right side within each section. This form is separated into three sections.

The screenshot displays the Timely Access form interface. The form is divided into three main sections, each highlighted with a red border:

- (Top) Section 1:** This section contains the "First Request for Services" and "Registered Client Name" fields. It includes a "Walk-in / Call-in Time" dropdown, a "Walk-in / Call-in Program" dropdown, and a "Type of Service Requested" dropdown with options for Outpatient, SUD Residential, and Withdrawal Mgmt. There are also checkboxes for "Check this box if client is not registered" and "Non-Registered Client Name", and a "Non-Registered Client Date of Birth" field.
- (Middle) Section 2:** This section contains the "Appointment Date Offered" field, an "Appointment Type" dropdown, and a "Primary Language" dropdown. It also includes three dropdowns for "Select Outpatient Program", "Select SUD Residential Program", and "Select Withdrawal Mgmt Program".
- (Bottom) Section 3:** This section contains a "Rationale" text area, a "Notes" text area, and a "Placement Issues" section with checkboxes for various issues: History of Violence, Assault, Arson, Threatening/Hostile/Aggressive, Sexually Acting Out, History of Verbal Abuse, Active Substance Use, Self-Harm, Language, Wandering, Medication Non-Compliance, and Refuses Level of Care. There is also a field for "Other (type into the below box)".

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How to Use Timely Access (Continued):

Section 1 is the most important section to navigate correctly. Selections in this section will enable and require fields in other sections.

Section 1

The screenshot shows the 'Section 1' of the SUD Timely Access form. It is a web-based interface with a light blue header and a white body. The form is organized into two main columns. The left column contains four sections: 'First Request for Services' with a date and time picker; 'Walk-in / Call-in Time' with a time picker and a 'Current' button; 'Walk-in / Call-in Program' with a dropdown menu; and 'Type of Service Requested' with three radio button options: 'Outpatient', 'SUD Residential', and 'Withdrawal Mgmt'. The right column contains three sections: 'Registered Client Name' with a text input field; a checkbox labeled 'Check this box if client is not registered.' with a 'Yes' option; 'Non-Registered Client Name' with a text input field; and 'Non-Registered Client Date of Birth' with a date and time picker. The entire form is enclosed in a red border.

By default, today's date and time are entered into 'First Request for Services' and 'Walk-in/Call-in Time'. These can be modified by you. Next, select the program your program from the 'Walk-in/Call-in Program' field.

It is important to identify the 'Type of Service Requested' by selecting Outpatient, SUD Residential or Withdrawal Mgmt before completing the rest of this form. This selection prompt you to complete other fields in the form.

To verify if the individual already exists in Avatar, search for the client by entering their name into 'Registered Client Name'. If you determine the individual registered, checkmark 'Yes' which will enable and require the fields for 'Non-Registered Client Name' and 'Non-Registered Client Date of Birth'. Proceed to complete these fields before moving to the next section of this form.

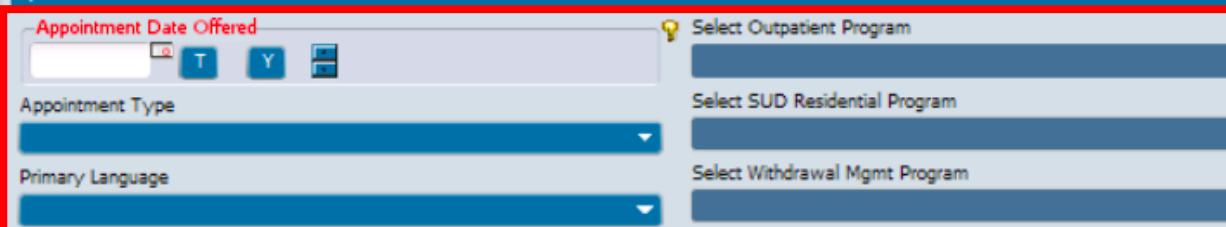
Registered Client Name' and 'Non-Registered Client Date of Birth'. Proceed to complete these fields before moving to Section 2 (middle) of this form.

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How to Use Timely Access (continued):

In Section 2 of this form, we continue using the same left to right process to completing the fields. As previously mentioned, selecting a type of service requested (Outpatient, SUD Residential, Withdrawal Mgmt.) will enable and require other fields in this section.

Section 2



The screenshot displays the 'Section 2' of the SUD Timely Access form. It features a red border around the input fields. On the left side, there are three fields: 'Appointment Date Offered' with a date picker and 'T', 'Y', and 'PM' buttons; 'Appointment Type' with a dropdown menu; and 'Primary Language' with a dropdown menu. On the right side, there are three program selection options: 'Select Outpatient Program', 'Select SUD Residential Program', and 'Select Withdrawal Mgmt Program', each with a corresponding dropdown menu.

Complete all required fields including the 'Appointment Date Offered' and select a program for the service requested (Outpatient, SUD Residential, or Withdrawal Mgmt.) before proceeding to Section 3.

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How to Use Timely Access (continued):

Section 3 of the form has a few important fields some of which will be enabled and required based on the type of service that was requested.

Section 3

There is an attestation at the top of this section that states, “Click ‘Yes’, if *Appointment Date Offered does not follow this requirement*”. There are specific timelines for Outpatient, SUD Residential, and Withdrawal Mgmt described below.

- Outpatient: Appointment Date Offered is within 10 business days from the date entered into field ‘First Request for Services’ located at the top of the form in Section 1.
- SUD Residential: Appointment Date Offered is with 10 calendar days from the date entered into field ‘First Request for Services’ located at the top of the form in Section 1.
- Withdrawal Mgmt: Appointment Date Offered is with 48 hours from the date entered into field ‘First Request for Services’ located at the top of the form in Section 1.

If ‘Yes’ is clicked, the ‘Rationale’ field will be enabled and required. Enter your rationale for not meeting the target timeframe for an appointment.

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How to Use Timely Access (continued):

Any notes that you would like to include can be entered into the 'Notes' field located at the bottom of Section 3.

The screenshot shows a web-based form for SUD Timely Access. At the top, a light blue box contains instructions: "Click 'Yes' if appointment date offered does not follow this requirement: within 10 business days for Outpatient, within 10 calendar days for Residential and within 48 hours for Withdrawal Mgmt. Enter your rationale below." Below this is a green radio button labeled "Yes" with a note: "(If you choose 'Yes' in error, click 'Yes' again, then press the 'F5' Key to clear option.)". Underneath is a "Rationale" section with a text input field and a small icon. Below that is a "Notes" section with a larger text input field and a small icon. At the bottom is a "Placement Issues" section with a grid of checkboxes. The checkboxes are arranged in three columns: History of Violence, Assault, Arson; Threatening/Hostile/Aggressive, Sexually Acting Out, History of Verbal Abuse; Active Substance Use, Self-Harm, Language; Wandering, Medication Non-Compliance, Refuses Level of Care; and Other (type into the below box). Below the "Other" checkbox is a small text input field.

Finally, the 'Placement Issues' section will become enabled only when 'SUD Residential' or 'Withdrawal Mgmt' are selected as 'Type of Requested Service'. You can check more than one box in 'Placement Issues'. Selecting 'Other' will enable the small box below where you can enter a placement issue that is not already listed.

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How to Locate and Run the Timely Access Report:

In the Avatar Search Forms box, type 'Timely Access' and select 'Timely Access and Access Call Log Report' from the drop down list. If you do not see this report in the drop down list, please contact the Avatar Help Desk to request access.

The screenshot shows the Avatar Search Forms interface. The top navigation bar includes 'My Views: HomeviewResSAHR', 'Admit', 'Medical', 'PURQC', 'RESIDENTIAL', 'SUD', 'TPOC SA', and 'To Do'. The 'Selected Client' field is empty. The left sidebar contains 'My Clients', 'Recent Clients', 'Recent Psychiatric Inpatient Admissions', and 'Message Center'. The main area is divided into 'My Forms' and 'Search Forms'. The 'Search Forms' section shows a search for 'timely' with a dropdown list of results. The 'Timely Access and Access Call Log Report' is highlighted in green. Below the search results, there is a table with columns for 'Name', 'Menu Path', and 'From'.

Name	Menu Path	From
A/OA D17 Timely Access Report by Program	Avatar PM / Performance Objective Reports	
CalOMS Discharge Timely Status	Avatar PM / Performance Objective Reports	
Timely Access	Avatar PM / New Forms	
Timely Access Reports (Management)	Avatar PM / New Forms	
Timely Access Report (Program)	Avatar PM / New Forms	
Timely Access and Access Call Log Report	Avatar PM / New Forms	


Below is the report window. Enter a date range that will include your entries in Timely Access. As you can see, there is no prompt for your name. The report can only be run by the person that created the entry in Timely Access.

The screenshot shows the 'Timely Access and Access Call Log Report' window. The title bar reads 'Timely Access and Access Call Log Report'. The main area has a 'Process' button and a 'Timely Access and Access' dropdown. Below the dropdown are several icons: a yellow star, a grey square, a grey circle, a red star, a grey star, and a grey star. To the right, there are 'Start Date' and 'End Date' fields, each with a calendar icon and a dropdown menu. The 'Start Date' field is currently empty, and the 'End Date' field is also empty.

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Timely Access Report (Continued):

Below is a screenshot of the report. If there is no data on the report, rerun it using a larger date range between the Start Date/End Date.

 City and County of San Francisco Department of Public Health COMMUNITY BEHAVIORAL HEALTH SERVICES		Timely Access and Access Call Log Report for Date Range 2/2/2021 to 2/3/2021				
Walk-in/Call-in Program		ACCESS Screening				
Client Name	Appointment Date Offered	Days Difference	Attestation	Appointment Program	Appointment Type	Primary Care Provider Insurance Plan
Walk-in/Call-in Date: 2/2/2021						
11:46 AM	Martinez, Tores	2/2/2021	0		Informational Call	
JUNG, CARL						
						Total Number of Walk-in/Call-in Clients for date: 2/2/2021: 1
Walk-in/Call-in Date: 2/3/2021						
09:13 AM	Martinez, Tores	2/3/2021	0		Informational Call	
SEND R, FRANK						
						Total Number of Walk-in/Call-in Clients for date: 2/3/2021: 1
						Total Number of Walk-in/Call-in Clients for Walk-in/Call-in program - ACCESS Screening for date range: 2
						% of Appointments Offered Within 10business days of Call-in/Walk-in for Program - ACCESS Screening within date range: 100.00 %

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For Help using Timely Access:

Questions regarding policy, procedure or specific situations can be directed to Erik Dubon (erik.dubon@sfdph.org).

Technical questions regarding errors or problems with the form or report can be directed to Avatar Help Desk (avatarhelp@sfdph.org). Avatar Help Desk is available Monday-Friday (except on Holidays) from 8:00 AM to 5:00 PM.