SUD Timely Access Guide

DHCS requires that BHS track timely access to all SUD treatment programs. They are specifically interested in the <u>first available</u> 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

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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 <u>not</u> 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.

Next, there is a prompt to enter your name. Enter your first or last name in the seach 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.
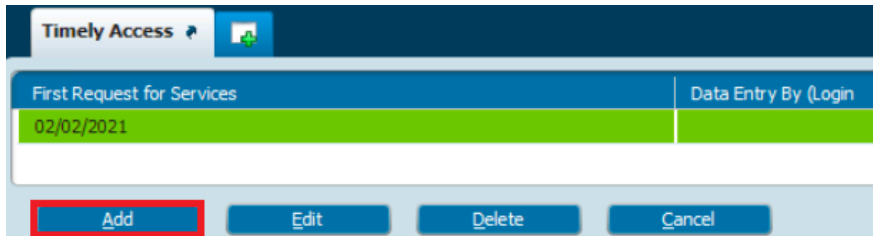
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How to locate Timely Access (continued):

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.

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.

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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.

<u>Section 1</u>

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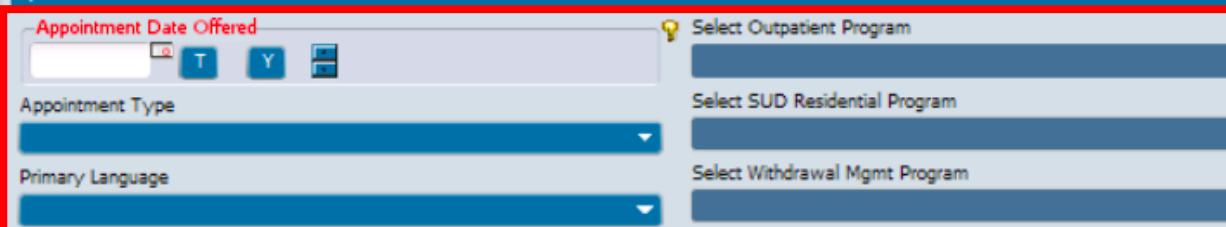
Registered Client Name' and 'Non-Registered Client Date of Birth'. Proceed to complete these fields before moving to Section 2 (middle) of this form.

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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

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.

<u>Section 3</u>

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.

- <u>Outpatient:</u> 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.
- <u>SUD Residential:</u> 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.
- <u>Withdrawal Mgmt:</u> 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.

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.

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.

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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.

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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.