Substance Use Treatment Workflow

Scan the QR code to access the training website:

	Thing You Want to Do	What is it Called?	Pro Tip
1	Look Up Client to See if They Are in the System Yet	S Inquiries (My Office)	Worth reading the directions the first time; remember you will need to search by name, DOB and SSN before you can create a new client in the system.
2	Admit Client to Your Program	S Client Programs (Client)	Click this to add a new program.
3	Screen Client	S BQuIP - Brief Questionnaire for Initial Placement (Client)	Screening will provide level of care and referral recommendations.
4	Complete Consents	S Coordinated Care Consent (Client) S Consent for Email Communication (Client) S Consent for Telehealth (Client) S Consent for Text Communication (Client) S Consent to Treat (Client)	Coordinated care consent allows for sharing of information between all programs, including other 42CFR Part 2 and mental health programs.
5	Conduct Assessment	S CA ASAM (Client)	The ASAM includes the Tabacco Use Disorder Assessment in the Final Determination tab.
6	Establish Diagnosis	S Diagnosis Document (Client)	Star your favorites. Only LPHAs have access to the Diagnosis Document.
7	Complete Required State Forms	S CalOMS Admission (Client)	
8	Schedule Client Services	S Staff Calendar (My Office)	You can use appointment search (My Office) to search for appointments within a program.
9	Write a Note	A New Service Note	Document any new needs identified in the problem list and check each of the problems addressed during the service.
10	Discharge	S Client Programs (Client) S CalOMS Update/Discharge (Client)	Change status to discharged and add a discharged date. Your last progress note in the program will be your discharge summary.