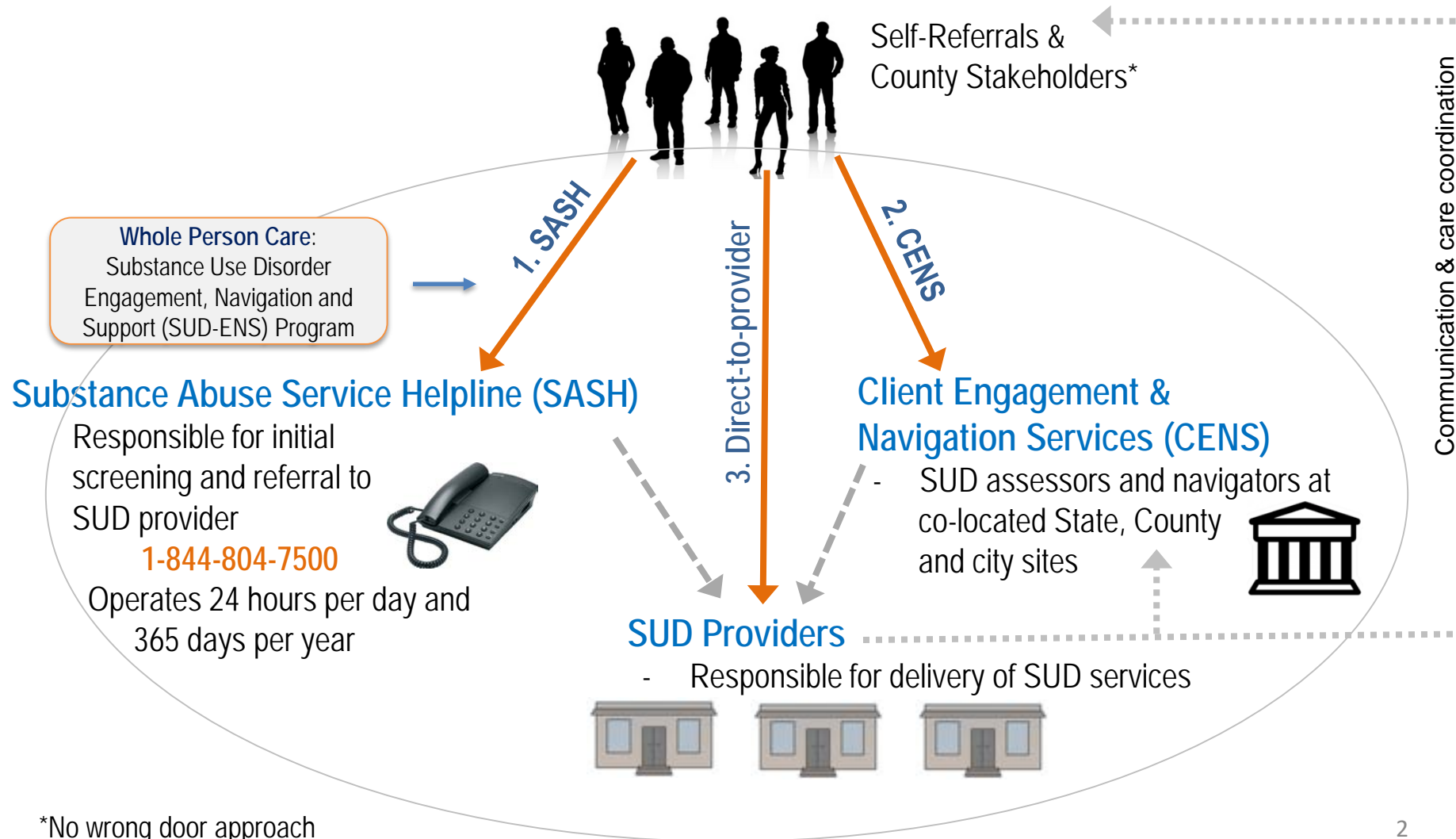# Youth & Adult Screening and Referral Connection Training for Treatment Providers

Department of Public Health
Substance Abuse Prevention and Control Division

Main Entryways into the Specialty SUD System

Self-Referrals & County Stakeholders*

Communication & care coordination

Whole Person Care: Substance Use Disorder Engagement, Navigation and Support (SUD-ENS) Program

1. SASH

3. Direct-to-provider

2. CENS

Substance Abuse Service Helpline (SASH)

Responsible for initial screening and referral to SUD provider

1-844-804-7500

Operates 24 hours per day and 365 days per year

Client Engagement & Navigation Services (CENS)

- SUD assessors and navigators at co-located State, County and city sites

SUD Providers

- Responsible for delivery of SUD services

*No wrong door approach

Introduction and Overview

- Why was the Referral Connection Form developed?
  - To document and track Screenings of individuals who access services Direct-to-provider
  - HCPCS H0049 will allow providers the ability to be reimbursed for screenings completed at contracted service locations
  - **All Treatment Providers (including Secondary Users)** will be required to document screenings within the Referral Connections Form in ProviderConnect

- In the event of a Sage Outage refer to: Bulletin 17-11 Sage Outage Procedure

NEW SCREENING EXPECTATIONS BEGINNING SEPTEMBER 2019

Beginning September 2019, All Treatment Network Providers are required to:

(1) Complete either a CO-Triage or Youth Engagement Screener for each individual who comes to the facility requesting treatment services; and

(2) Connect the individual to treatment either at your agency or another agency, and document the referral attempt(s) and the scheduled appointment in the Referral Connection Form; and

(3) Submit a claim when both (1) and (2) are completed.

STEP 1: ADMISSION FORM

Determine if the individual has been served in the treatment network before and then complete the Admission Form in Sage

Admitting a Patient Into Sage

Providers ALWAYS need to verify using "Add New Client/Client Search" <u>before</u> creating a new patient within Sage to make sure that a client profile does not already exist, which will help to avoid duplicate patient charts.

☒ "Look Up Client" section → Only searches patients at your specific site

☑ "**Add New Client/Client Search**" section → Searches all patients across entire Sage network

- If the patient shows on the "**Add New Client/Client Search**" results but not on "Look Up Client", this means the patient has been seen by another provider in our network, but not your specific agency.

- **DO NOT** create a new patient in this situation, simply open the chart to add an episode for your agency.

1. **Enter all required fields and the Date of Birth (DOB) if known to get the highest possible match.**

    The score is based on how much the result matches the search criteria entered:

    A score of 231 is an exact match based on the 5 criteria entered.

    A score without the DOB is 191, which would still indicate a match, but not as strong.

    In this scenario, based on the search criteria entered, it is very certain the top result is the patient that is being searched.

2. **IF THERE IS A MATCH: Select the Blue Hyperlink with the ID to further verify the patient and begin documenting if there is a match, starting with the patient demographics.**

	Search Results						
ID	**Name**	**Date Of Birth**	**Client's Address City**	**Client's Address Zipcode**	**Alias**	**Social Security Number**	**Score**
42248	MARK THOMPSON	12/06/1991	LOS ANGELES	90064		960-38-1697	231
65651	MARK THOMPSON	09/08/1984	ALHAMBRA	91803		454-36-6861	91
41458	MARK B THOMPSON	05/09/1967	Alhambra	91803		325-90-3110	91
107991	MARK P THOMPSON	02/12/1960	Alhambra	91803		764-55-9657	91
125964	MARK X THOMPSON	08/05/1951	LONG BEACH	90804		501-32-4206	91

Create Admission for New Client

☒ **Do not select** "**Create Admission for New Client**" for this situation since the patient was found and already exists in the system.

☑ Selecting the patient ID link will associate this patient with a new episode for your agency.

3. **IF NO MATCH IS DISPLAYED**: When search results populate as "No clients found", this means there are no patients within the entire SAPC network of providers that meet any of the criteria entered.

> 1st verify the information entered was correctly input.

> 2nd select the "Create Admission for New Client" button if an appropriate match is not found.

Search Criteria	
Social Security Number:	999-88-1111
Last Name:	Testt
First Name:	Patient
Sex:	⦿ Female - F ◯ Male - M ◯ Transgender (F to M) - FTM ◯ Transgender (M to F) - MTF ◯ Unknown - U
Date of Birth:	01/01/1900

Search

No clients found.

Create Admission for New Client

☑ Select "**Create Admission for New Client**" in this situation since the patient was not found and does not exist in the system. Adding the patient will open a new episode for your agency and create new Sage ID.

Admission Form and Demographics

- **After selecting an existing patient or creating a new patient, the first screen is always admission and demographics.**

- When conducting a **screening and the patient will not be admitted to the agency** only the following fields are required (but all are recommended):
  - Sex
  - Date of Birth
  - Admission Date
  - Program
  - Attending Practitioner
  - Type of Admission
  - Age
  - Admission Time
  - Social Security Number
  - First Name, Last Name
  - Address
  - Race
  - Primary Language

Admission Information

Sex
○ Female - F   ● Male - M   ○ Transgender (F to M) - FTM   ○ Transgender (M to F) - MTF   ○ Unknown - U

Date of Birth
10/21/1985

Age
33

Admission Date
07/24/2019

Admission Time
08:10 AM   *HH:MM AM/PM*

Program
Recovery Inc ▼

Admitting Practitioner
USER,TEST (003005) ▼

Attending Practitioner
USER,TEST (003005) ▼

Treatment Service
SPA 6 - South - 6 ▼

Type of Admission
First Admission - 1 ▼

Social Security Number
123-45-6789

Demographics

Client Last Name
Test

Client Home Phone Number

Client First Name
Patient

Client Work Number

Client Address Line 1

Client Address Line 2

Client Address - City

Client Address - State
-Please Choose One- ▼

Client Address - Zip Code

Client Address - County
-Please Choose One- ▼

Marital Status
-Please Choose One- ▼

Are you heterosexual, lesbian, gay, bisexual, transgender or do you question your sexual orientation?
-Please Choose One- ▼

Race
-Please Choose One- ▼

Education
-Please Choose One- ▼

Ethnic Origin
-Please Choose One- ▼

Religion
-Please Choose One- ▼

Other Ethnic Origin
Field not yet supported

Place of Birth

Country of Origin
-Please Choose One- ▼

Maiden Name

Occupation
-Please Choose One- ▼

Client's Primary Language
-Please Choose One- ▼

Informed of Smoking Policy
○ No - N   ○ Yes - Y

Employment Status
-Please Choose One- ▼

STEP 2A: SCREENING FORM - ADULTS

All individuals who come to your agency seeking treatment need to be screened using the appropriate tool

STEP 2B: SCREENING FORM - YOUTH

All individuals who come to your agency seeking treatment need to be screened using the appropriate tool

Member ID
159904

Demographic
Cal-OMS Admission
Cal-OMS Annual Update
Cal-OMS Discharge
Financial Eligibility
Real-time 270 Eligibility Request
Client Condition - Pregnancy
Authorizations
Treatment
Provider Admission
Attachments
Provider Diagnosis (ICD-10)
Client Consent
ASAM Assessment

1. Select ASAM Assessment on the left side chart menu

2. Select the episode for your agency

Episode Number	Program
1 Select	Recovery Inc

3. On the ASAM form, select "Triage Assessment" under ASAM Type

ASAM Assessment

Refresh ASAM Information

ASAM Type
TriageAssessment ▼

Assessment
Create New ▼

Launch ASAM

Refresh Assessment Information

Assessment Level of Care Information

4. Select "Create New" under Assessment
5. Select Launch ASAM to begin triage/screening

***NOTE: The ASAM Assessment Form in Sage is used to access both the ASAM Continuum and the CO-Triage assessments..

❑ The CO-Triage consists of approximately 30 questions, all with simple dropdown answers.
  ➢ Most questions are required.
    ➢ There is a percentage listed on the right side of the screen that will tell you if you have not completed 100% of the required questions.
  ➢ There are free text boxes to elaborate on any additional clinical information.
❑ Once completed, you will be able to view the report by clicking "View Report" on the ASAM itself.
  ➢ This report is also available in Sage at any time after completing the ASAM by clicking "View Report" on the Sage ASAM Assessment page.

The assessment has been successfully scored!
Click view report to review.

View Report

View Report
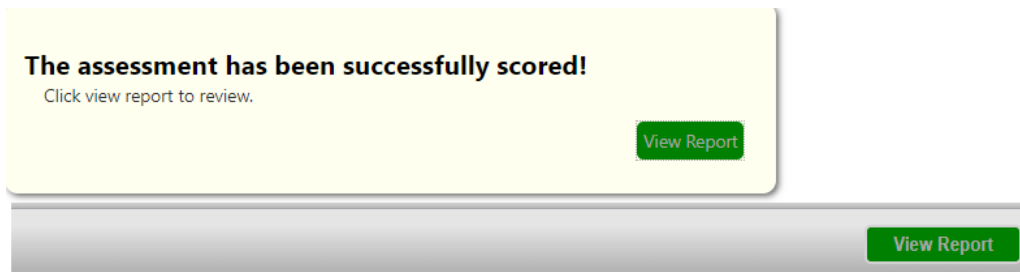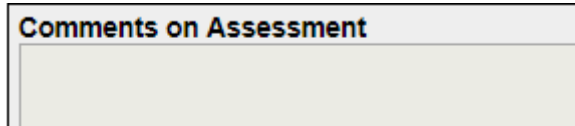
View ASAM Report

❑ The ASAM Report will provide the provisional Level of Care (LOC) under the last item in the report titled "FINAL SCORING & PROVISIONAL RECOMMENDATION"

❑ Enter the provisional LOC on the ASAM form in Sage and on the Service Connections Form where applicable.

➢ **Recommended Level of Care** is what the ASAM report shows as the recommended LOC

➢ **Actual Level of Care** is what you and the patient agree is the most appropriate (can be different)

➢ When the **Actual Level of Care** and **Recommended Level of Care** differ:

➢ the **Level of Care Override** is enabled and must be selected as YES

➢ If multiple LOC's are noted, choose the LOC that best meets the patients needs.

❑ Additionally, after completing the ASAM CO-Triage, the "Comments on Assessment" box in Sage is enabled which allows providers to enter any additional information not accounted for on the CO-Triage itself.

Comments on Assessment

➢ Information to include:
  ✓ Reason for the discrepancy between actual and recommended LOC
  ✓ Behavioral or observational information about the patient during the screening.

❑ Once all information is completed, including the comments, the form needs to be finalized by clicking the "Final" button AND the "Update Assessment" button needs to be clicked to submit.

Recommended Level Of Care
-Please Choose One-

Actual Level Of Care
-Please Choose One-
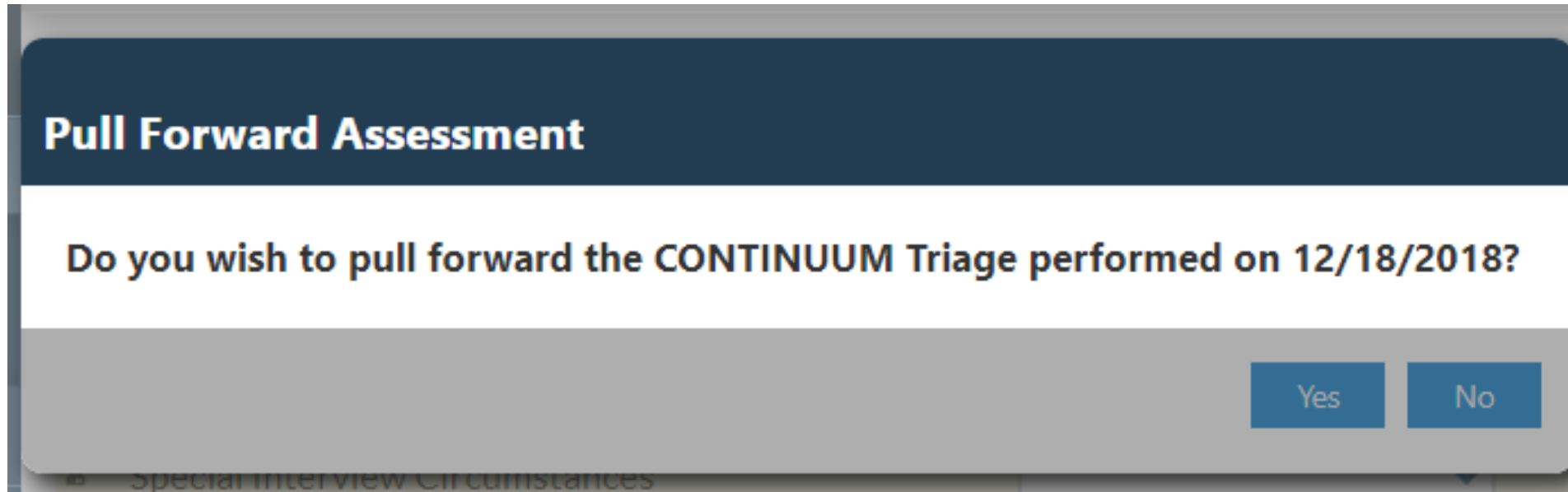
Level Of Care Override
-Please Choose One-

Draft/Final
◉ Draft ○ Final

Update Assessment   Return To Episode List

GOOD NEWS! If you admit the patient to your treatment agency, the screening information can be imported to the ASAM Continuum……

STEP 3: Referral Connections Form

If the youth or adult screened needs treatment, complete the Referral Connection Form even if the individual will be admitted to your agency

Referral Connection Form

Once in the client's chart, select Referral Connection Form

A Referral Connection Form is **required for all patient encounters** when a CO-Triage or Youth Engagement Screener is initiated.

All Secondary user will need to complete this form in Provider Connect.

Referral Connection Form

1. Select episode

Episode	Program	Start	End
1	ADDICTION RESEARCH AND TREATMENT INC.	3/9/2016	

2. For a new contact select: Add New Record

Service Connections Log Items

	Date of Contact	ASAM Provisional Level of Care	Referral ID #	Form Status	Data Entry By Login

Add New Record

3. To edit an in progress log: Choose correct episode and press the Select button.

Service Connections Log Items

	Date of Contact	ASAM Provisional Level of Care	Referral ID #	Form Status	Data Entry By Login
Select	07/21/2019	1-WM [Outpatient WM]	15557	Draft	ProviderConnect WebSvcs (do not edit)

Referral Connection Form

Date of Contact

Time of Contact

Referral Connection

Date of Contact
[ ] [Today] [Yesterday]

Time of Contact
[ ] [Current Time]

Referral Source
[▼]

Specify Other Referral Source
[ ]

CDCR (CA Dept of Corrections/Rehab)
DCFS - (Dept Children/Family Services)
DHS (Dept Health Services)
DHS-CHS (Correctional Health Svcs)
DHS-ODR (Office Diversion/Reentry)
DMH (Dept Mental Health)
DPSS (Dept Public Social Services)
FQHC (Federally Qualified Health Center)
Health Net
Housing Provider
LA Care
LA City Attorney
LASD (Los Angeles Sheriff's Dept)
Managed Care - Other
Other (Specify in Notes Section)
Parent/Family Member/Caregiver
Private Hospital or Clinic
Probation
Public Defender
SAPC Provider
SASH Call Agent
School
Self-Referral
Superior Court - LA County

Referral Source: Select the agency or entity that referred the client to your agency

All fields in red are required fields

Referral Connection Form

ASAM Provisional Level of Care

Level of Care Override Reason
- ○ 1 Clinical Judgment Disagrees with ASAM
- ○ 2 Court Mandated - Referred to CENS
- ○ 3 Patient Preference for other LOC
- ○ 4 Recovery Support Services Only
- ○ 5 None - Final Disposition Same as ASAM
- ○ 99 Other

Override Explanation

ASAM Provisional Level of Care

- 0.5 ASAM
- 1-WM [Outpatient WM]
- 2.1 [Intensive Outpatient]
- 3.1 [Low-Intensity Res]
- 3.2-WM [Res WM]
- 3.3 [Pop-Specific High-Intensity Res]
- 3.5 [High-Intensity Res]
- 3.7 [Medically Monitored Inpatient]
- 3.7-WM[Medically Monitored Inpatient WM]
- 4 [Medically Managed Inpatient]
- 4-WM [Medically Managed Inpatient WM]
- ASAM 1 [outpatient]
- Incomplete
- Negative Screening for SUD
- OTP [Opiod Treatment Program]
- Recovery Support Services
- Refused

ASAM Provisional Level of Care

Referral Connection Form

Referral to OTP or MAT service made

If the individual indicated frequent heroin or opiod medication use within the past 30 days, a referral may also be made to an Opiod Treatment Program	
(OTP) and/or Medication for Addiction Treatment (MAT) provider.	
Was a referral to OTP or MAT services made? [▾] No / Yes	Referral ID #
The provider will need this number to record a No-Show if the patient does not show up for their scheduled appointment.	
CIN	Aid Code

CIN

Aid Code

Referral Connection Form

Overall Disposition: Indicate the Overall Disposition of the client encounter

Insurance Coverage

Insurance Coverage

Ineligible
Medi-Cal Eligible
Medi-Cal Enrolled (LAC)
Medi-Cal Enrolled (Non-LAC)
Medi-Cal Pending
Medi-Cal/Medicare Enrolled
My Health LA Eligible
My Health LA Enrolled
Private Insurance
Select County Programs (e.g. AB 109)

Overall Disposition

Called 911 for Emergency
Cannot Complete
Intake Scheduled
Not Eligible (County of Residence)
Not Eligible (Coverage)
Other (Specify in Notes Section_)
Patient prefers to wait for availability
Referred to Next Most Appropriate LOC
Referred to Other Services
Referred to Whole Person Care
Refused Referral or Treatment

Referral Connection Form

Overall Disposition: Indicate the Overall
Disposition of the client encounter

Overall Disposition

Notes

Form Status
◉ Draft ○ Final

Overall Disposition

- After Hours - Left Message for Provider
- Called 911 for Emergency
- Cannot Complete
- Dropped Call and Unable to Reach Caller
- Not Eligible (County of Residence)
- Not Eligible (Coverage)
- Other (Specify in Notes Section)
- Patient prefers to wait for availability
- Referred for Other Services
- Referred to Next Most Appropriate LOC
- Referred to Whole Person Care
- Refused Referral or Treatment
- Successful Referral to Treatment

Form Status: Draft or Final

Service Connections Log
SUD Referral Provided

Next Steps: Form Status, Claiming and Training

Form Status

- SAPC will make a formal announcement of when this form will be officially available to providers in Live.
    - This live date will act as the official effective date for providers to be reimbursed for screening.

Update on Claiming

- SAPC will set up one Provider Authorization (PAuth) for each agency to use when billing for screening.
    - I.e. providers will use this same PAuth for all reimbursable screenings completed and will not need separate authorizations.

Additional Training

- A separate detailed usage and billing training webinar will be scheduled and announced to providers once policy/workflow has been finalized.
- SAPC will also be offering ASAM CO-Triage specific trainings for staff who are not familiar with the triage assessment or need additional training.

Referral Connection Sage Rollout Timeline

Referral Connection Sage Timeline:

September 2019: Sage Referral Connection webinar trainings conducted.

September 2019: Referral Connection Form will be active in the LIVE Sage environment. All Staff will begin using the logs in Sage.

September 2019: Agencies will document all client Screening information in Sage.

THANK YOU

For more information, contact:
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