Table of SRADL Changes 06/28/19

SRADL Question / or Discussion Topic	Discussion / Needs	Possible Changes	Decision / Final Changes	To Do's
Universal script for people taking calls.	• Some groups have one for clerical staff, others do not. • Discussion of this group coming up with universal script, in order to strengthen use of tool and to train individuals who handle calls/requests. • Script may be based on various common scenarios that present at gates.	•	•	•
Date of Request	• Training and lightbulb needed: Info needs to reflect actual time of call, fax, etc…because this "starts the clock" for measuring timeliness. It should be not the date/time when the call or request was actually logged.	• ADD LIGHTBULB: Please enter the actual date of call, fax, etc….NOT when the information is added to this log.	•	•
Time of Request	• See above.	• ADD LIGHTBULB: Please enter the actual time of call, fax, etc….NOT when the information is added to this log.	•	•
Request Method **START HERE NEXT TIME** WHAT DO WE WANT IN THE "REQUEST SOURCE" AND "REQUEST METHOD" DICTIONARIES?	• Discussion: **Both request source and request method need cleaning up.** Some "source" items are actually "methods." Some "methods" are actually "sources." • This question mixes up two things, the method of	**Suggested Dictionary Changes** • ADD: "Answering Service" as a dictionary item (and remove it from Request Source) • Remove "Other" as a dictionary item. Then,	**Final Dictionary Update:** *(This will be the complete dictionary after edits.)* •	• Update Dictionary •

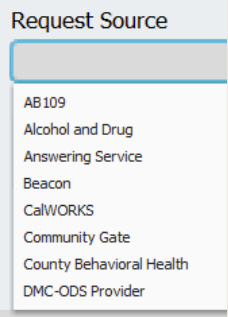|				
Current Request Method Dictionary • **Call** • **Walk-in** • **Email/Fax** • **Other**	request and then directs to the Request Source •	<mark>make "Request Source" never red/required (but always open)</mark> •		
Request Source Request Source AB109 Alcohol and Drug Answering Service Beacon CalWORKS Community Gate County Behavioral Health DMC-ODS Provider **Current Request Source Dictionary** • **Other Insurance Company** • **Out of County Behavioral Health** • **Out of County Psych Facility** • **PACT** • **Primary Care** • **Probation** • **Project Home Base** • **Santa Cruz County CSP** • **Santa Cruz County PHF** • **Schools** • **Serial Inebriate Program** • **Law Enforcement** • **DMC-ODS Provider** • **AB109** • **Alcohol and Drug (Need to change to SUD)** • **Answering Service (Recommend moving this to "Request Method")** • **Beacon** • **CalWORKS** • **Community Gate** • **County Behavioral Health** • **Family and Children Services** **Integrated Behavioral Health**	•	**Suggested Dictionary Changes** • ADD (Jasmine): HOPES • EDIT (Jasmine): Change PACT to PACT Court (Need to confirm that we don't need to also keep plain PACT.) • ADD (Barbara/Access): Add ???? • ADD: Family and Children Services • REMOVE: Serial Inebriate Program • CHANGE: Alcohol and Drug to Substance Use Disorder Svcs (If this is too long, then "SUD Services") • ADD: Access	**Final Dictionary Update:** *(This will be the complete dictionary after edits.)* •	• Update Dictionary • Program Logic (always enabled, never required)

Reason for Inquiry	• "Community Information Received"
	  ○ This is when someone who is not the client or the legal guardian, calls, or sends referral information about client.
	  ○ It may be framed as a request, but it is not an official "request for services" because this does not involve the legal guardian/client.
	  ○ If this triggers follow-up with client/legal guardian, the "request for services" is triggered when client/guardian is contacted and states they are interested in services.
	  ○ Discussion of disabling "Urgency Level" question if "Information Request" is clicked. If this happens, then the list item from "Urgency Level," "NA-Information Only" won't be needed.
		•	• Update dictionary as shown.
			• Move up form, underneath date of request area.
			
			• **Reason for Inquiry Dictionary Update:**
			• *(This will be the complete dictionary after edits.)*
			• LABEL CHG: Information request (requested by caller; provided to caller)
			• NEW: Community Information Received
			• Client / Legal Guardian Req for Services
			• LABEL CHG: Request for Second Opinion (from Client/Legal Guardian)
			• LABEL CHG: Request for Psychiatry
			• NEW: NTP/MAT Request for Services (3-day timeline)
			• NEW: Engagement/Outreach Contacts
			• NEW: Crisis Service
				• Update Dictionary, Move Question, and Program Logic

Urgency Level	• Concern expressed that moving the question up the page complicates	• Move Question up the page?	• Disable question if either "Info" item is clicked for Reason for	• Update Dictionary

	• workflow for situations where there is a clerk filling out part of the form. • Seems like this is a clinical rather than clerical decision. • Agreement to make red/required. ○ If this results in contact with client/guardian who does want services, then do a second log. On this one, click "Request for Services." **Suggested Dictionary Changes:** • EMERGENT - 72 hr. Psychiatric Eval for Hospitalization • URGENT - Crisis counseling, walk-in service, urgent appointment with non-physician or physician within 96 hours (4 calendar days) • ROUTINE - Routine appointment with non-physician within 10 business days • Urgent (48 Hours) • Urgent NTP (3 days) • Psychiatric Pre-Authorization • NA - Information Only		Inquiry. (Community Info or Info Request) • Make red/required if any other items (non-info items) are clicked for Reason for Inquiry **Final Dictionary Update:** *(This will be the complete dictionary after edits.)* Needs to be **Red/Required** and Add: • Emergent (immediate) • Urgent (36 Hours) • Routine (10 days) • Urgent NTP (3 days) • Psychiatry (15 days) • NA - Information Only (keep??) LOGIC: If "Info" questions clicked in "Reason for Inq" then disable this question.	• Program Logic
Caller Contact Number	•	•	•	•

Table of SRADL Changes 06/28/19

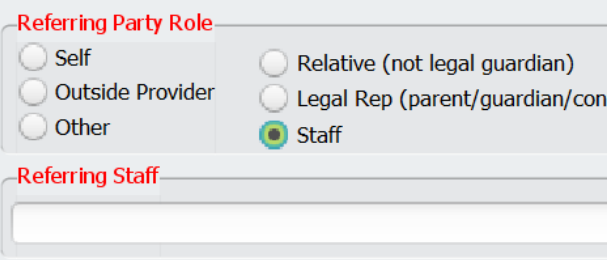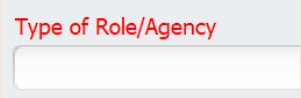|				
Referring Party Role Referring Party Role ○ Self ○ Relative (not legal guardian) ○ Outside Provider ○ Legal Rep (parent/guardian/con ○ Other ● Staff Referring Staff	•	• **Remove dictionary item, "Outside Provider"?** It is redundant. It is answered in the question, "Type of Role/Agency" •	• Change label for "Staff" dictionary item to "Avatar Practitioner." • Needs lightbulb to help people understand how to answer question.	•
Referring Staff	•	•	• Change label to "Referring Practitioner"	•
Type of Role/Agency Type of Role/Agency	We clarified: • This is where you identify the role of the people calling and/or their agency affiliation. (i.e. who are they and where are they calling from)	•	• Needs lightbulb to help people understand what the dictionary items mean.	•
Does the Referring Party Prefer a Language Other Than English	•	•	•	•
REFERRING PARTY Preferred Language	•	•	•	•
Referring Party Last Name	•	•	•	•
Referring Party First name	•	•	•	•
Existing Client	• Note this gets disabled if "Potential Client Not Found…," is clicked.	•	•	•
Potential Client Not Found/Verified	• Add new checkbox ☐(new item to dictionary): "Yes – prefers to be anonymous" • If checked, the related fields below this question will all be enabled, but NOT required (i.e. not red).	•	•	•

Table of SRADL Changes 06/28/19

Potential Client Not Found/Verified ☐ Yes Potential Client First Name Potential Client Last Name DOB [ ] T Y SSN [ ] Phone Number [ ] Address [ ]				
Potential Client First Name	•	•	•	•
Potential Client Last Name	•	•	•	•
DOB	•	•	•	•
SSN	•	•	•	•
Phone Number	•	•	•	•
Address	•	•	•	•
Does the Client Prefer a Language Other Than English? (Yes / No)	•	•	•	•
(Reason for Inquiry)	•	•	• This will be moved up to the top of the form. See above for discussion about this item.	•
System of Service Requested System of Service Requested ☐ Alcohol and Drug ☐ Managed Care ☐ Mental Health	•	•	•	•
Clerical Disposition	•	•	•	•
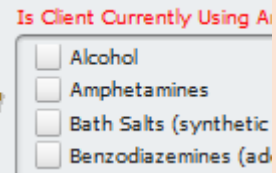
Clerical Disposition Call not routed Clerical information given Direct Routed to clinician				
Clerical Notes	•	•	•	•
Activate Clinical Review (Yes / No)	•	•	•	•
(Urgency Level)	•	•	• This will be moved up to the top of the form. See above for discussion about this item.	•
Is Client Currently Using Any Substances? Is Client Currently Using A Alcohol Amphetamines Bath Salts (synthetic Benzodiazemines (ad	• Remove? • Other suggestion is to transform into yes/no, only available when Referring Party Role = Self •	•	•	•
If we are brokering a referral is client giving us permission to share this information? (Yes / No / NA)	•	•	•	•
Clinical Disposition Clinical Disposition Health Navigation Denied Denied Services - NOABD Provided Information Referred for Services Referred to BEACON Referred to Integrated BH Referred to Community Support Unable to Contact Assessment in Progress Crisis Services	• Clinical Disposition (CURRENT DICTIONARY)	•	•	•

Clinical Notes to support Disposition	•	•	•	•
Clinical Staff filling out this form	•	•	•	•
Referred to Provider	•	•	•	•
Referring Client To 	•	•	•	•
Referred to Provider	•	•	•	•
Referred to Program	• This question only allows you to pick one program. Which means when there are multiple referrals, they won't all be tracked.	•	•	•
Intake/Appointment Date	**THIS IS A VERY IMPORTANT QUESTION** • One of the timeliness calculations is number of days from service request to first appointment offered	•	•	•
Referred to Manage the Care Provider (1 of 2 duplicate questions). The dictionary is not populated. It is required when "Managed Care Provider" is checked.	• What was this for? • Currently it is not being used. Should it be removed?	•	•	•
Form Status (Draft / Final)	• Is there any logic we want to add to this? E.g. There could be a reminder when clicking "Final" to make sure that a disposition is entered.	•	•	•
	•	•	•	•
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Table of SRADL Changes 06/28/19