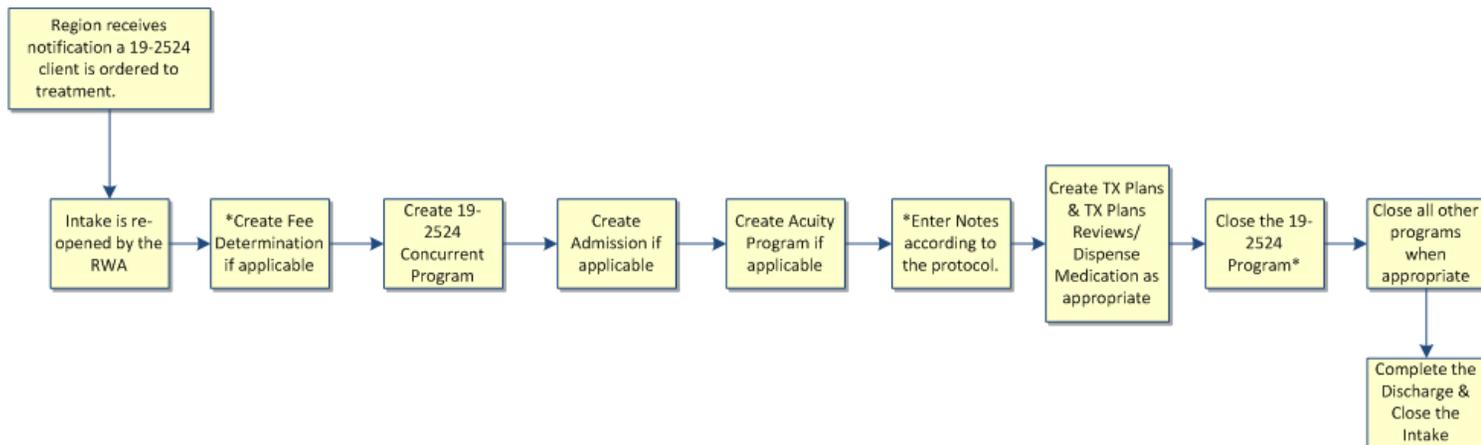


## Regional Process for a 19-2524 client ordered to treatment and services will be provided by the Region

### Client Flow

#### 19-2524 Client Ordered to Treatment & Services will be provided by the Region



Region receives notification a 19-2524 client is ordered to treatment.

- A. Intake is reopened by the Regional WITS Administrator (RWA).
- B. Create a fee determination record if applicable (fee determinations can be created when a Judge indicates a client must pay for treatment).
- C. Create a 19-2524 Concurrent program enrollment using the directions below ([click here for printable instructions](#)).

## Creating a 19-2524 Concurrent Program Enrollment

The program enrollment will be created by Regional Staff when the Region is notified a client is ordered under I.C. 19-2524 to receive treatment services.



Encounter notes cannot be released under this program.



When the client receives treatment services directly from the Region, the clinician must also enroll the client in a program for treatment (acuity) such as Med-only clinic, FACT, MH Court or ACT.

Begin on the client activity list.

Client: 19-2524, Client | 10827169000003L | 2 Clear Client

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	7/15/2016	5/13/2013	Completed
	Intake Transaction	7/15/2016	7/28/2016	Completed
	Client Program Enrollment (19-2524 Assessment Only)	7/20/2016	7/28/2016	Completed
	Mental Health Assessment	7/27/2016	7/28/2016	Completed
	Miscellaneous Note Summary	7/28/2016	7/28/2016	Not Applicable
	Court Monitoring Form	7/28/2016	7/28/2016	Completed
	Diagnosis Summary	7/28/2016	7/28/2016	Not Applicable

Navigation Pane:

- Home Page
- Agency Contacts
  - Agency
  - Dispensary
  - Group List
- Clinical Dashboard
- Client List
  - Client Profile
    - Gain Short Screener
  - Benefit Application
  - Linked Consents
  - Client Contacts
  - Non-Episode Contact
  - Activity List
    - Intake
    - Client Eligibility
    - Fee Determination
    - Court Monitoring
    - Wait List
  - Assessments
  - Diagnosis List
  - Admission
  - Program Enroll**

1. Once you're in the activity list, click **Program Enroll** on the blue navigation pane.

Client: 19-2524, Client | 10827169000003L | 2 ✖ Clear Client

### Program Enrollment

Program Name  Facility

Modality

From:  To:

Active Program Enrollments During Date Range

Clear Go

### Program Enrollment List

Add Enrollment

Actions	Program Name	Start Date	End Date	Facility	Notes
	19-2524 Assessment Only	7/20/2016	7/28/2016	Boh...	

Finish

2. Click **Add Enrollment** on the right side of the program enrollment list bar.



The Start date of the program enrollment is the day the Region is notified the client is ordered to treatment

**Program Enrollment Profile**

Facility	Boise	Days on Wait List		Start Date	7/28/2016
Program Name		End Date			
Program Staff	Brownfield, Michelle				
Termination Reason					
Notes					

Cancel Save Finish

3. Select the program of 19-2524 Concurrent and enter the start date (**day the Region is notified the client is ordered to treatment**).

**Program Enrollment Profile**

Facility:  Days on Wait List:  Start Date:  End Date:

Program Name:  Program Staff:

Termination Reason:

Notes:

4. Click  and .

**Program Enrollment**

Program Name:  Facility:

Modality:

Active Program Enrollments During Date Range From:  To:

**Program Enrollment List** [Add Enrollment](#)

Actions	Program Name	Start Date	End Date	Facility	Notes
	19-2524 Concurrent Program	7/28/2016		Boise	
	19-2524 Assessment Only	7/20/2016	7/28/2016	Boise	

WITS will take you back to the program enrollment list. Click  to return to the client activity list.

D. Create admission if applicable.

E. Create acuity program enrollment if applicable (the program may already exist if this is an active client).

F. Create Notes to document all activity related to a 19-2524 Concurrent program enrollment using Miscellaneous Notes, and select any note type except for 19-2524 Note. While this may seem odd, the 19-2524 Note is only used for documenting 19-2524 Assessment activities under that program enrollment. Create notes using the instructions below ([click here for printable instructions](#)).

## Creating a Regional 19-2524 Non-Assessment Note



Regions will only select the type of 19-2524 on a note when documenting the time spent on an IDMHA assessment.

Begin on the client activity list.

The screenshot shows a software interface with a blue navigation pane on the left and a main content area on the right. The navigation pane includes options like Home Page, Agency Contacts, Agency, Dispensary, Group List, Clinical Dashboard, Client List, Client Profile, Gain Short Screener, Benefit Application, Linked Consents, Client Contacts, Non-Episode Contact, Activity List, Intake, Client Eligibility, Fee Determination, Court Monitoring, Wait List, Assessments, Diagnosis List, Admission, Program Enroll, ECourt, Encounters, Notes, and Treatment. The 'Notes' option is highlighted with a red box and a red arrow. The main content area displays a 'Client Activity List' table with columns for Actions, Activity, Activity Date, Created Date, and Status.

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	7/15/2016	5/13/2013	Completed
	Intake Transaction	7/15/2016	7/28/2016	Completed
	Client Program Enrollment (19-2524 Assessment Only)	7/20/2016	7/28/2016	Completed
	Mental Health Assessment	7/27/2016	7/28/2016	Completed
	Client Program Enrollment (19-2524 Concurrent Program)	7/28/2016	7/28/2016	Completed
	Miscellaneous Note Summary	7/28/2016	7/28/2016	Not Applicable
	Court Monitoring Form	7/28/2016	7/28/2016	Completed
	Diagnosis Summary	7/28/2016	7/28/2016	Not Applicable

1. **Notes** on the blue navigation pane.

**Notes Search**

Start Date  End Date

Allow Disclosure of Note

**Notes List** [Add New Misc. Note](#) [Print Notes](#) [Add New Encounter Note](#)

Actions	Note Type	Date	Duration	Staff	Service/Summary

2. Click [Add New Misc. Note](#) on the right side of the notes list blue bar.



Do not select the type of 19-2524 on a note when documenting the time spent on any activity outside of an IDMHA.



Select the note type that reflects the type of note you are entering. The most commonly used note types will likely be the following: Case Management, Administrative, Collateral.

Miscellaneous Notes

Author Name: Van Skike, Anna  
Author Title:  
Created Date:

Note Type: Administrative Note  
Program: 19-2524 Assessment Only  
Frequency:  
Summary: Summary Here

Signed Notes

Service Date: 8/1/2016  
Start Time: 9:00 AM  
End Time: 9:15 AM

Duration: 15 Min  
Alert: No  
Mark Alert  
Was Report Sent to State

Release these notes? No  
Cancel Save Finish

Unsigned Notes

Add Note Sign Note

3. Select the note type that reflects the information you are documenting. For example, if you are documenting the time it took to schedule an appointment, you could select the type of Administrative Note.
4. **Select the program of 19-2524 Assessment Only.**
5. Complete all other required fields.

**Miscellaneous Notes**

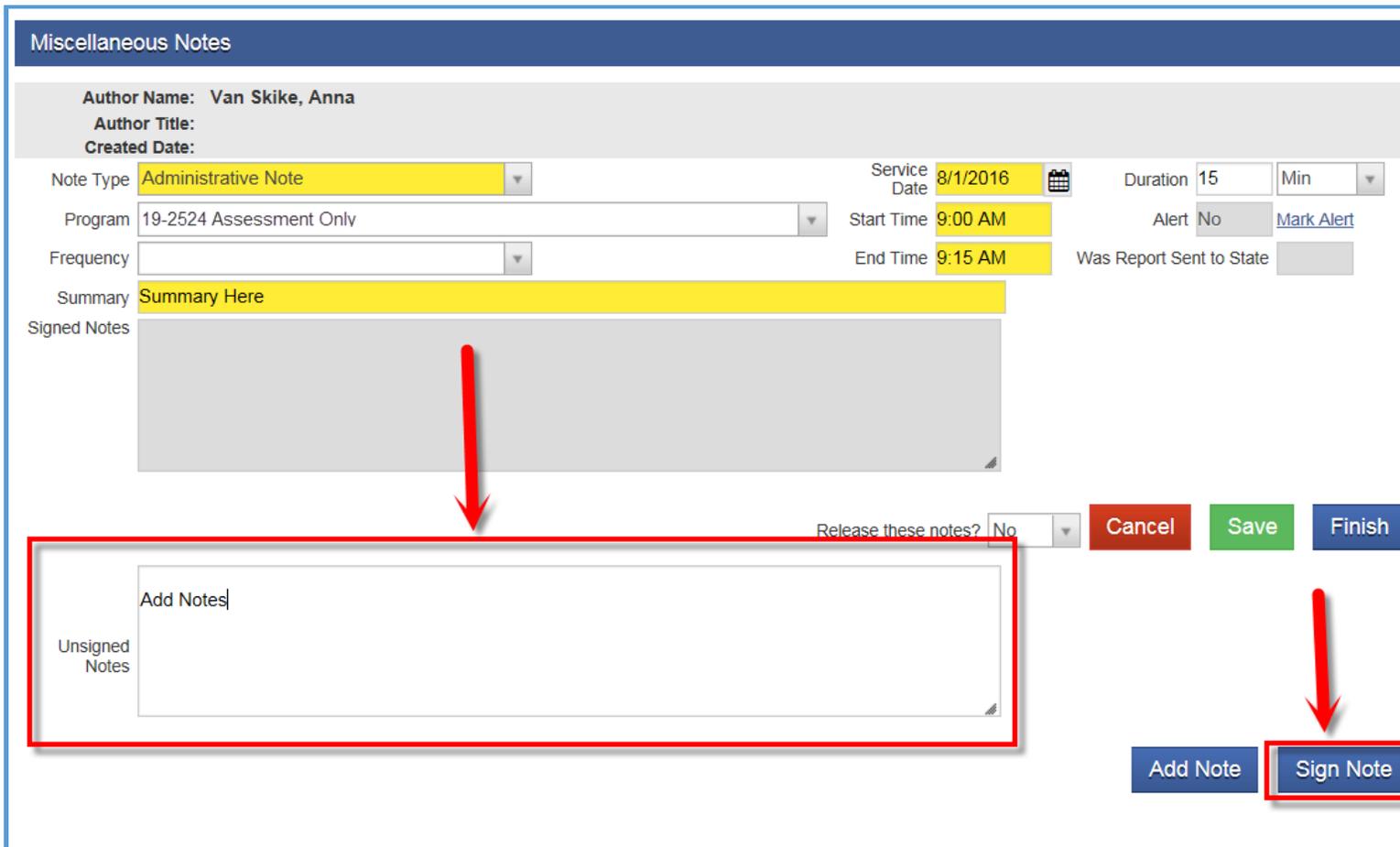
Author Name: Van Skike, Anna  
Author Title:  
Created Date:

Note Type: Administrative Note Service Date: 8/1/2016 Duration: 15 Min  
Program: 19-2524 Assessment Only Start Time: 9:00 AM Alert: No Mark Alert  
Frequency: End Time: 9:15 AM Was Report Sent to State:  
Summary: Summary Here  
Signed Notes:

Release these notes? No Cancel Save Finish

Unsigned Notes: Add Notes

Add Note Sign Note



6. Enter notes in the Unsigned note section and click **Sign Note**.

**Miscellaneous Notes**

Author Name: Van Skike, Anna  
 Author Title:  
 Created Date:

Note Type: 19-2524 Note  
 Service Date: 8/1/2016  
 Duration: 15 Min  
 Program: 19-2524 Assessment Only  
 Start Time: 9:00 AM  
 Alert: No [Mark Alert](#)  
 Frequency:  
 End Time: 9:15 AM  
 Was Report Sent to State:

Summary: Summary Here

Signed Notes

Signed by Van Skike, Anna, 8/1/2016 4:43:09 PM:  
 Add Notes

Unsigned Notes

Release these notes? No

Cancel Save Finish

Add Note Sign Note

7. When your note is signed it will move up to the signed note section and will include a date and time stamp. Click  and .

**G. Create treatment plans, treatment plan reviews, and dispense medication as appropriate.**

**H. Close the 19-2524 Concurrent program enrollment using the directions below [\(click here for printable instructions\)](#).**

# Closing a 19-2524 Concurrent Program Enrollment



The program enrollment should be closed when services are complete, or the client is referred to a community provider, or if the order expires and the client is not actively in services.

Begin on the client activity list.

Client Activity List				
Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	7/15/2016	5/13/2013	Completed
	Intake Transaction	7/15/2016	7/28/2016	Completed
	Client Program Enrollment (19-2524 Assessment Only)	7/20/2016	7/28/2016	Completed
	Mental Health Assessment	7/27/2016	7/28/2016	Completed
	Client Program Enrollment (19-2524 Concurrent Program)	7/28/2016	7/28/2016	Completed
	Intake Note Summary	7/28/2016	7/28/2016	Not Applicable
	Court Monitoring Form	7/28/2016	7/28/2016	Completed
	Diagnosis Summary	7/28/2016	7/28/2016	Not Applicable

1. Find the 19-2524 concurrent program enrollment in the activity list and hover over and click **Review**.



The program enrollment should be closed when services are complete, or the client is referred to a community provider, or if the order expires and the client is not actively in services.

The screenshot shows a web form titled "Program Enrollment Profile". The form contains several fields: "Facility" with the value "Boise"; "Program Name" with the value "19-2524 Concurrent Program"; "Program Staff" with a dropdown menu showing "Brownfield, Michelle"; "Termination Reason" with a dropdown menu; and "Notes" with a text area. On the right side, there are two date fields: "Start Date" with the value "7/28/2016" and "End Date" which is empty. A red box highlights the "End Date" field, and a red arrow points to it from the right. Below the form are three buttons: "Cancel" (red), "Save" (green), and "Finish" (blue). There is also a "Days on Wait List" field with a small icon next to it.

2. Enter the end date **(when services are complete, or the client is referred to a community provider, or if the order expires and the client is not actively in services).**

**Program Enrollment Profile**

Facility	Boise	Days on Wait List		Start Date	7/28/2016
Program Name	19-2524 Concurrent Program			End Date	7/31/2016
Program Staff	Brownfield, Michelle				
Termination Reason					
Notes					

Cancel Save Finish

3. Select the termination reason and
- **Select Admin termination if the court order expires, or you are unable to make initial contact with client**
  - **Select Referred if the client is referred for services to community provider**
  - **Select Transferred if the client is transferred to another Region**
  - **Select Treatment Completed when the client has completed the court ordered treatment**
  - **Select Left w/notice or Left w/o notice according to the specific circumstances.**

4. Click **Save** and **Finish**.

Program Enrollment

Program Name  Facility

Modality

From:  To:

Active Program Enrollments During Date Range

Program Enrollment List

Actions	Program Name	Start Date	End Date	Facility	Notes
	19-2524 Concurrent Program	7/28/2016	7/31/2016	Boise	
	19-2524 Assessment Only	7/20/2016	7/28/2016	Boise	

5. WITS will take you to the program enrollment list. Click  to return to the client activity list.

- I. Close all other programs when appropriate.
- J. Complete the discharge and close the intake.