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

1. 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

2. Client Engagement & Navigation Services (CENS)
   - SUD assessors and navigators at co-located State, County and city sites

3. Direct-to-provider

Self-Referrals & County Stakeholders*

*No wrong door approach

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

Communication & care coordination
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.
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” before 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.

☐ 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.

   1. **First** verify the information entered was correctly input.
   2. **Second** select the “Create Admission for New Client” button if an appropriate match is not found.

![Search Criteria table]

- **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 button]

- **Search**

![Message box]

- **No clients found.**

![Button]

- **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.
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
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.
Adult (18+) Screener: Accessing the ASAM CO-Triage

1. Select ASAM Assessment on the left side chart menu

2. Select the episode for your agency

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

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 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.

- 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.
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

<table>
<thead>
<tr>
<th>Episode</th>
<th>Program</th>
<th>Start</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ADDICTION RESEARCH AND TREATMENT INC</td>
<td>3/1/2016</td>
<td></td>
</tr>
</tbody>
</table>

2. For a new contact select: Add New Record

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

Date of Contact

Time of Contact

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

*All fields in red are required fields*
### Referral Connection Form

<table>
<thead>
<tr>
<th>ASAM Provisional Level of Care</th>
<th>Level of Care Override Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.5 ASAM</td>
<td>1 Clinical Judgment Disagrees with ASAM</td>
</tr>
<tr>
<td>1-WM [Outpatient WM]</td>
<td>2 Court Mandated - Referred to CENIS</td>
</tr>
<tr>
<td>2.1 [Intensive Outpatient]</td>
<td>3 Patient Preference for other LOC</td>
</tr>
<tr>
<td>3.1 [Low-Intensity Res]</td>
<td>4 Recovery Support Services Only</td>
</tr>
<tr>
<td>3.2-WM [Res WM]</td>
<td>5 Name - Final Disposition Same as ASAM</td>
</tr>
<tr>
<td>3.3 [Pop-Specific High-Intensity Res]</td>
<td>99 Other</td>
</tr>
<tr>
<td>3.5 [High-Intensity Res]</td>
<td></td>
</tr>
<tr>
<td>3.7 [Medically Monitored Inpatient]</td>
<td></td>
</tr>
<tr>
<td>3.7-WM [Medically Monitored Inpatient WM]</td>
<td></td>
</tr>
<tr>
<td>4 [Medically Managed Inpatient]</td>
<td></td>
</tr>
<tr>
<td>4-WM [Medically Managed Inpatient WM]</td>
<td></td>
</tr>
<tr>
<td>ASAM 1 [outpatient]</td>
<td></td>
</tr>
<tr>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>Negative Screening for SUD</td>
<td></td>
</tr>
<tr>
<td>OTP [Opioid Treatment Program]</td>
<td></td>
</tr>
<tr>
<td>Recovery Support Services</td>
<td></td>
</tr>
<tr>
<td>Refused</td>
<td></td>
</tr>
</tbody>
</table>

ASAM Provisional Level of Care

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**Override Explanation**

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Referral Connection Form

If the individual indicated frequent heroin or opioid medication use within the past 30 days, a referral may also be made to an Opioid Treatment Program (OTP) and/or Medication for Addiction Treatment (MAT) provider.

<table>
<thead>
<tr>
<th>Was a referral to OTP or MAT services made?</th>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referral ID #</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The provider will need this number to record a No-Show if the patient does not show up for their scheduled appointment.

<table>
<thead>
<tr>
<th>CIN</th>
<th>Aid Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Referral Connection Form

Overall Disposition: Indicate the Overall Disposition of the client encounter

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)
Referral Connection Form

Overall Disposition: Indicate the Overall Disposition of the client encounter

Form Status: Draft or Final
# Service Connections Log

**SUD Referral Provided**

## SUD Referrals Provided

<table>
<thead>
<tr>
<th>Referral Treatment Provider</th>
<th>Referral Site Disposition</th>
<th>Appointment Date</th>
<th>Appointment Time</th>
<th>Appointment Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACFW 1135 South Alvarado St</td>
<td>Not Scheduled</td>
<td>2023-01-01</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
<tr>
<td>ACFW 1147 South Alvarado St</td>
<td>Not Scheduled</td>
<td>2023-01-02</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
<tr>
<td>ACFW 20533 Catalina St</td>
<td>Not Scheduled</td>
<td>2023-01-03</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
<tr>
<td>ACFW 242 West 14th St</td>
<td>Not Scheduled</td>
<td>2023-01-04</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
<tr>
<td>ACFW 354 West 13th St</td>
<td>Not Scheduled</td>
<td>2023-01-05</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
<tr>
<td>ACFW 356 West 15th St</td>
<td>Not Scheduled</td>
<td>2023-01-06</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
<tr>
<td>ACFW 357 West 15th St</td>
<td>Not Scheduled</td>
<td>2023-01-07</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
<tr>
<td>ACFW 376 West 15th St</td>
<td>Not Scheduled</td>
<td>2023-01-08</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
<tr>
<td>ACFW 378 West 15th St</td>
<td>Not Scheduled</td>
<td>2023-01-09</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
<tr>
<td>ACFW 423 West 13th St</td>
<td>Not Scheduled</td>
<td>2023-01-10</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
<tr>
<td>ACFW 425 West 13th St</td>
<td>Not Scheduled</td>
<td>2023-01-11</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
<tr>
<td>ACFW 477 West 15th St</td>
<td>Not Scheduled</td>
<td>2023-01-12</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
<tr>
<td>ACFW 832 West 14th St</td>
<td>Not Scheduled</td>
<td>2023-01-13</td>
<td>12:00</td>
<td>Scheduled</td>
</tr>
</tbody>
</table>

**Add New Record**

- After Hours Call (Referral Info Only)
- Intake Not Available - SBAT Shows Open
- Intake Not Scheduled - Site to Call Back
- Intake Scheduled (0-9 Minutes)
- Intake Scheduled (10 Minutes or More)
- No Answer/Direct to YM (Intake Hours)
- Patient Refused w/provider Contact
- Refused LAC Medi-Cal Enrolled
- Refused Language/Culture Need
- Refused Medi-Cal Eligible/Unenrolled
- Refused Mental Health Condition
- Refused MH/LA Enrolled/Eligible
- Refused Non-LAC Medi-Cal Enrolled
- Refused Physical Health Condition
- Refused Program Rule/Requirement
- Refused Wheelchair/ADA Accessibility
- Waitlist - Patient Preference
- Waitlist - Provider Indicated
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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