



Appointment Disposition and Referral ID Report

Substance Abuse Prevention and Control
County of Los Angeles - Department of Public Health



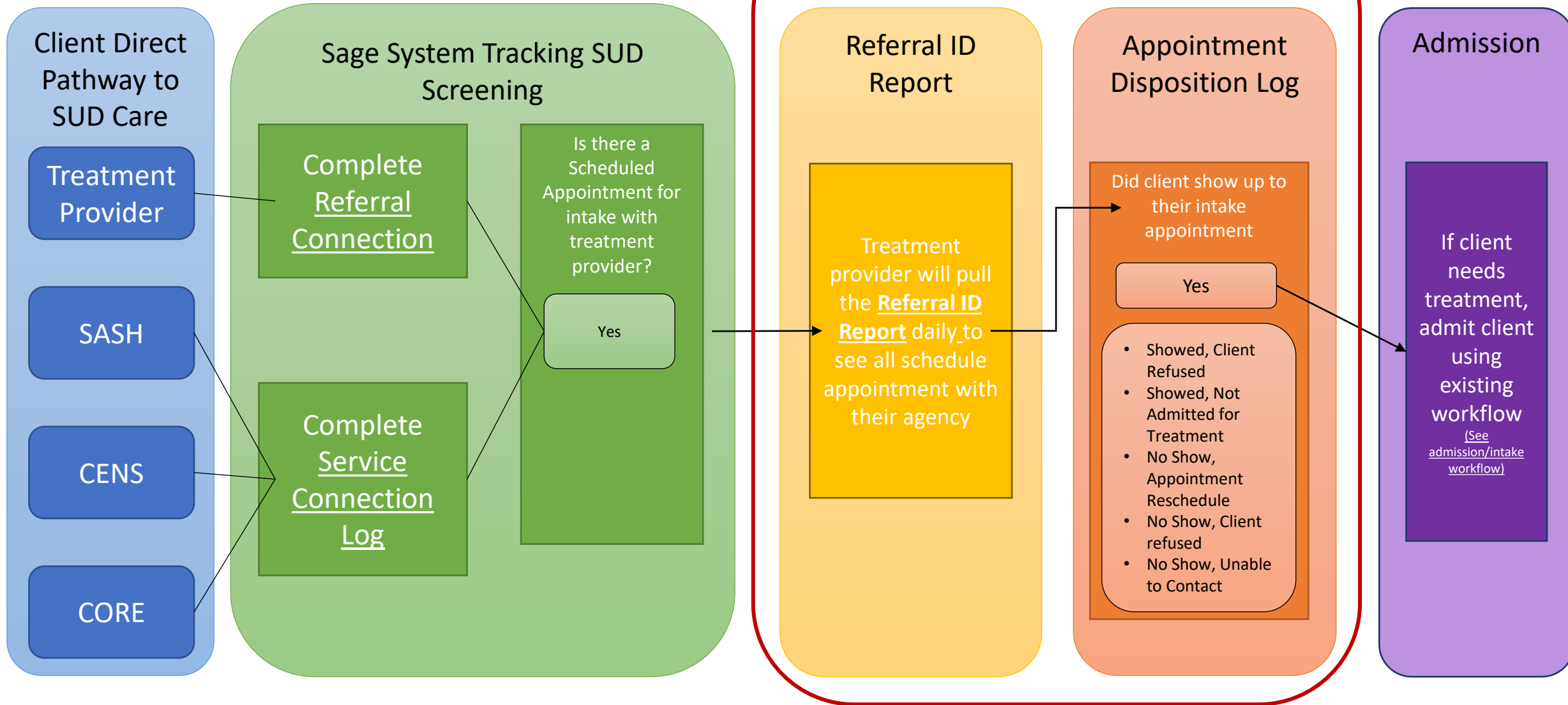
Outline

- Access to Care Workflow
- Referral ID Report
- Documentation Overview:
 - Admission
 - Referral Connection
- Appointment Disposition

s a d e

Substance Use Disorder Information System

Access to Care



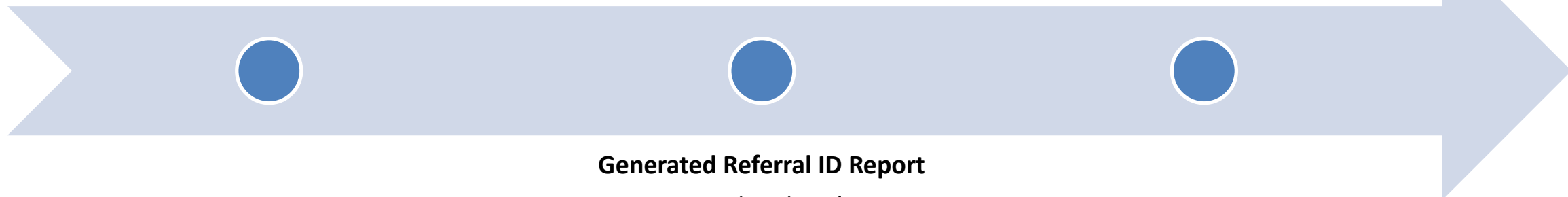
Referral ID Report

Admission & Referral Connection Data

The Referral ID report is populated from the Referral Connections Form (completed for direct provider referrals) and Service Connection Log (completed by SASH, CENS, and CORE)

Utilizing Referral ID Report for Documentation

Providers are required to pull this report on a daily/weekly basis to complete the Appointment Disposition Log form



Generated Referral ID Report

Report provides client's Name, Date of Birth, gender, contact information (if available), appointment date, and time (if available).



- Providers should **ALWAYS** check **“Admission (Outpatient)”** before creating a new patient within Sage to make sure that a client profile doesn’t already exist for that patient.
 - “Search Client” section → Searches patients across entire Sage network
 - **To avoid duplicate clients where multiple Sage profiles get created for the same patient, providers need to first check the “Client Search” on the Admission (Outpatient) form to make sure that patient’s profile isn’t already in Sage before creating a new profile.**
 - If the patient shows on the “Client Search”, 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.

Overview: Search Client/Adding New Client



Client Search

Last Name: First Name: Sex: x v

Social Security Number: Date of Birth:

Assigned ID: Alias: Alias (Additional Text): Alias (Additional Text):

Search

Clear

Info	Score	Name	ID	Date Of Birth	Client's Address - City	Client's Address - Zipcode	Alias	Social Security Number
Info	131	SCREEN,TEST	160056	06/02/1980	ALHAMBRA	91803-8800		444-44-4444
Info	91	SCREEN,TEST	160133	05/02/1956	ALHAMBRA	91803-8800		888-88-8888
Info	75	SCREENING,TEST	161353	11/20/1990	ALHAMBRA	91803-8800		201-25-6584

New Client

Cancel

Enter all required fields and the Date of Birth if known to get the highest possible match.

Select the patient with the most matching information to open a new admission for your agency.
❖ Do not select "New Client" for this situation since the patient was found and already exists in the system.

- If the client isn't listed, this means there are no patients within the SAPC network of providers that meet any of the criteria entered.
- If the provider is confident this is accurate, then select "New Client" to create new admission.

Overview: Admission Form and Demographics



SCREENING, TEST (000161353)

SCREENING, TEST (000161353)
M, 33, 11/20/90
Preferred Name: -
Personal Pronouns: -

Ep: 2 :
DX P: -
Facility Chart#: -

Location: 1000 S FREMONT AVE, ALHAMBRA, CA
Communication Pref.: -
Phone #: -

Allergies (0)

ADMISSION (OUTPATIENT) [Submit] [Discard] [Add to Favorites]

Admission
Episode Information
Rights/Disabilities

Demographics
Client Demographics
SOGI
Contact Information
Smoking Status
Military Status
Alias

Other Client Data
Financial Eligibility
Online Documentation

Episode Information

Client Name: SCREENING,TEST

Episode Number: 2

Social Security Number: 201-25-6584

Date Of Birth: 11/20/1990

Age: 33

Sex: Female Male Other

Unknown

Preadmit/Admission Date *

Preadmit/Admission Time *
Current Time H M AM/PM

Admitting Practitioner *

Program *
Select

Type Of Admission *
Select

Source Of Admission
Select

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

- ❖ Sage only requires the fields noted in red, however, SAPC recommends completing additional fields for improved data collection and reporting.
- ❖ Additionally, ensure the address and/or phone number is correct for follow up and engagement.

Overview: Accessing the ASAM CO-Triage



ASAM ASSESSMENT

Submit Discard Add to Favorites

ASAM Assessment

- Assessment LOC Information
- Comments
- Outcome

Online Documentation

Refresh ASAM Information

ASAM Type

CONTINUUM Triage

Assessment


Create New

Launch ASAM View ASAM Report

Refresh Assessment Information View ASAM Narrative Report

Assessment LOC Information

Assessment Level Of Care Information

1. Open ASAM Assessment in search bar 
2. Select the episode for your agency
3. Select "CONTINUUM Triage" under ASAM Type
4. Select "Create New" under Assessment
5. Select Launch ASAM to begin triage/screening

Overview: Referral Connection



The screenshot displays a patient chart form for 'SCREENING, TEST (000161353)'. The left sidebar contains navigation menus for 'PATIENT CHART FORMS', 'ADMISSION/INTAKE', and 'CAL-OMS'. The main content area shows the 'Admission/Intake' tab selected, with a dropdown menu open for 'Referral Connections'. The dropdown menu lists several options, with 'Referral Connections' highlighted. The 'New Record' button at the bottom is also highlighted.

Form Description	Episode	Date	Time	Da En By	Wc Sta
ALL	A	A...	ALL		
Diagnosis	1 (Recov Inc)	06/20/2018	0831	Ho	

Form Specific PreDisplay

Buttons: Open, **New Record -**, Clear Filters, Open Record, Close All, Print -

Once in the patient's chart forms, select "New Record" and select **Referral Connection** or by searching for Referral Connection in the smart search bar

A Referral Connection is **required for all patient encounters** when a CO-Triage is initiated ([Provider Manual pg. 34](#)).



REFERRAL CONNECTIONS

Submit


Backup


Discard

Add to Favorites

Referral Connection
SUD Referrals Provided

▼

Date of Contact *  **T** **Y** **Time of Contact *** **Current Time** **H** **M** **AM/PM**

Referral Source * **Screening Site** 

Specify Other Referral Source

Managed Care Type **What type of advertisement?**

▼



REFERRAL CONNECTIONS

Autosaved at 9:11 AM

Submit

Backup

Discard

Add to Favorites

Referral Connection
SUD Referrals Provided

ASAM Provisional Level of Care *

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

Level of Care Override Reason *

- 1 Clinical Judgment Disagrees with ASAM
- 2 Court Mandated - Referred to CENS
- 3 Patient Preference for other LOC
- 5 None - Final Disposition Same as ASAM
- 99 Other

Override Explanation





REFERRAL CONNECTIONS

Autosaved at 9:13 AM

Submit

Backup

Discard

Add to Favorites

Referral Connection
SUD Referrals Provided

▼

Currently Pregnant? *

Yes No Unsure N/A

Is the client currently in custody?

Yes No

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?

Yes No

▼

Referral ID #

92

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

Overview: Referral Connection



REFERRAL CONNECTIONS

Autosaved at 9:13 AM

Submit

Backup

Discard

Add to Favorites

- Referral Connection
- SUD Referrals Provided

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



Insurance Coverage *

Select x v

Overall Disposition *

Select x v

Notes

Form Status *

Draft Final

Overview: Referral Connection



REFERRAL CONNECTIONS

Autosaved at 9:15 AM

Submit

Backup

Discard

Add to Favorites

- Referral Connection
- SUD Referrals Provided

▼

SUD Referrals Provided *

Referral Treatment Prov...	Referral Site Disposition	Appointment Date	Appointment Time	Appointment Status	Other Referral Provider	Other Provider Name
No records.						

Add New Item

Edit Selected Item

Delete Selected Item



REFERRAL CONNECTIONS

Autosaved at 9:15 AM

Submit

Backup

Discard

Add to Favorites

- Referral Connection
- SUD Referrals Provided**

Referral Treatment Provider



Referral Site Disposition

Appointment Status

Scheduled **Not Scheduled**

Appointment Date

Appointment Time

 H M

Other Referral Provider

SAPC Provider Not Listed
 Out-of-Network

Other Provider Name

How to access Referral ID Report



Search: referral id

Advanced Client Search

Here is what I found:

All 1 Clients 0 Staff 0 Forms 1

Forms

Undock	Name	Menu Option
	Referral ID Report	/ Avatar PM / PM Reports

MY TO DO'S

Additional ToDos 68

✓



REFERRAL ID REPORT

Process Discard Add to Favorites

Referral ID Report



Start Date *



T

Y



End Date *



T

Y



Select Provider(s) *

All | Clear Search

ALCOHOLISM CENTER FOR WOMEN INC.



Referral ID # Report

Date Parameters: 6/1/2023 - 6/30/2023



4/22/2024

Agency: ALCOHOLISM CENTER FOR WOMEN INC.

[appointment_time](#)

Location: ACFW 1135 South Alvarado St

Service Connections Log

Referral ID #	PATID	Patient Name (Last,First)	Date of Birth	Gender	Contact	Appointment Date	Appointment Time
15873	160233	Smith,Brenda	5/17/2002	Female	Cell: 123-554-3213	6/30/2023	11:00 AM
15875	160121	Doe,Peter	7/2/1975	Male	N/A	6/30/2023	

Referral Connections

Referral ID #	PATID	Patient Name (Last,First)	Date of Birth	Gender	Contact	Appointment Date	Appointment Time
70	159928	Cens,Sapc	7/1/2017	Unknown	N/A	6/7/2023	
74	159928	Cens,Sapc	7/1/2017	Unknown	N/A	6/24/2023	02:00 PM

Location: ACFW 1147 South Alvarado St

Service Connections Log

Referral ID #	PATID	Patient Name (Last,First)	Date of Birth	Gender	Contact	Appointment Date	Appointment Time
15870	160599	Test,Female	2/1/2002	Female	N/A	6/22/2023	11:05 AM

Referral Connections

Referral ID #	PATID	Patient Name (Last,First)	Date of Birth	Gender	Contact	Appointment Date	Appointment Time
77	110811	Paladino,Alt	10/23/1996	Male	N/A	6/28/2023	

Referral ID Report – how to export



Print Report

Export

Print Report Export

Format: Select A Format

- Select A Format
- Adobe Acrobat (PDF)
- Crystal Reports (RPT)
- Microsoft Excel (XLS)
- Microsoft Excel Record (XLS)
- Microsoft Word (RTF)
- Microsoft Word - Editable (RTF)
- Separated Values (CSV)
- Tab Separated Text (TTX)
- Text (TXT)
- XML

Ok

SAP CRYSTAL REPORTS



Referral ID # Report

Date Parameters: 6/1/2023 - 6/30/2023

4/22/2024

ER FOR WOMEN INC. appointment_time

arado St

Referral ID #	PATID	Patient Name (Last,First)	Date of Birth	Gender	Contact	Appointment Date	Appointment Time
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Service Connections Log

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Referral Connections



Appointment Disposition Log

The purpose for Appointment Disposition Log is to track client after screening and referral.

Providers are required to complete an appointment disposition log for each appointment scheduled arranged by SASH, CENS, CORE, or treatment provider.

Providers must indicate the outcome of the appointment, including reschedule appointment.

Providers are responsible to reach out at least three attempts to the client if they don't show up to the appointment.



Q appointment

[Advanced Client Search](#)

Here is what I found:



- All 1
- Clients 0
- Staff 0
- Forms 1

Forms

Undock	Name	Menu Option
	Appointment Disposition Log	/ Avatar PM / Assessments



MY TO DO'S



Additional ToDos

9



Select Program



a

Results

ACFW 1135 South Alvarado St (0013)

ACFW 1147 South Alvarado St (0014)

INC. ALCOHOLISM CENTER FOR WOMEN (LE0300)

Enter and select agency or site.

Appointment Disposition Log



✓ Selected Program : Inc. Alcoholism Center For Women (LE0300) (LE0300)

Select Record

Appointment Date ↕	Service Connection Referral ID ↕	Data Entry By (Option) ↕	Data Entry Date ↕
09/21/2023	15909	Julie Lo	09/21/2023
09/12/2023	15901	Julie Lo	09/14/2023
09/06/2023	15899	Julie Lo	09/22/2023

Add

Edit

Delete

Cancel

Appointment Disposition Log



Location: ACFW 1147 South Alvarado St

Service Connections Log

Referral ID #	PATID	Patient Name (Last,First)	Date of Birth	Gender	Contact	Appointment Date	Appointment Time
15870	160599	Test, Female	2/1/2002	Female	N/A	6/22/2023	11:05 AM

Referral Connections

Referral ID #	PATID	Patient Name (Last,First)	Date of Birth	Gender	Contact	Appointment Date	Appointment Time
77	110811	Paladino, Alt	10/23/1996	Male	N/A	6/28/2023	

ALCOHOLISM CENTER FOR WOMEN, INC. (LE0300)

APPOINTMENT DISPOSITION LOG

Submit

Discard

Add to Favorites

Appointment Disposition Log

Enter the Appointment Date, Program Site, and Referral ID found on the Service Connections Log (completed by SASH/CENS/CORE) or the Referral Connection form (completed by referring treatment provider) to record this appointment disposition.

Appointment Date *

06/28/2023

Appointment Disposition *

No Show - Appointment Rescheduled

Program Site *

ACFW 1147 South Alvarado St (0014)

Not Admitted to Treatment Reason

Select

Referral ID Type

- Service Connection Referral (SASH/CENS/CORE)
- Referral Connection Referral (Treatment Provider)

Please Specify

Rescheduled Appointment Date *

07/07/2023

Referral ID

Referral Connection Referral ID *

77

Appointment Disposition *

Select

No Show - Appointment Rescheduled

No Show - Client Refused

No Show - Unable to Contact

Showed - Admitted to Treatment

Showed - Client Refused Treatment

Showed - Not Admitted for Treatment

Not Admitted to Treatment Reason *

Select

Medically/mental health unstable

Other, please specify

Referred to Another Agency