Appointment Disposition and Referral ID Report

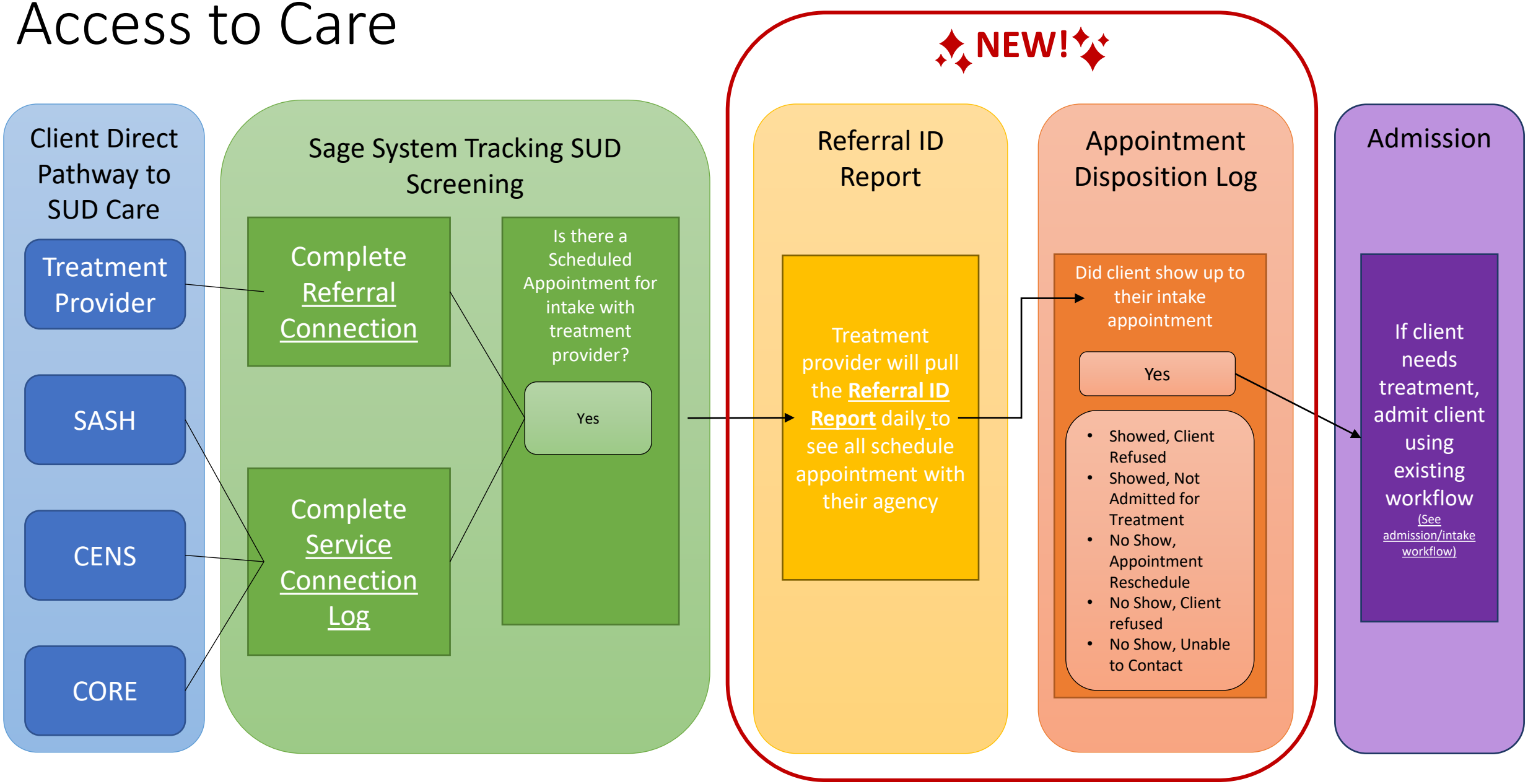
Substance Abuse Prevention and Control
County of Los Angeles - Department of Public Health

Outline

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

sage
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)

Generated Referral ID Report

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

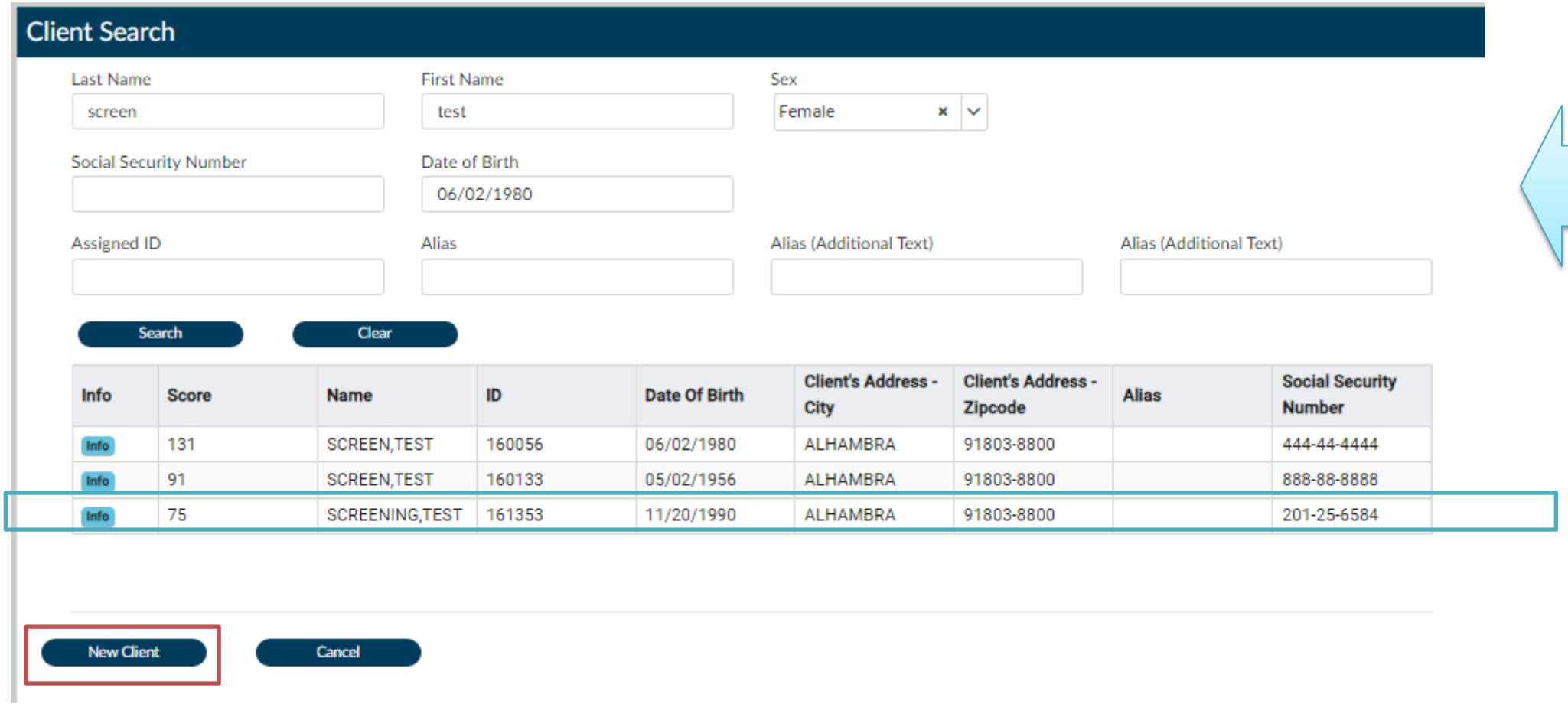
Utilizing Referral ID Report for Documentation

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

Overview: Admitting a Patient Into Sage

- **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



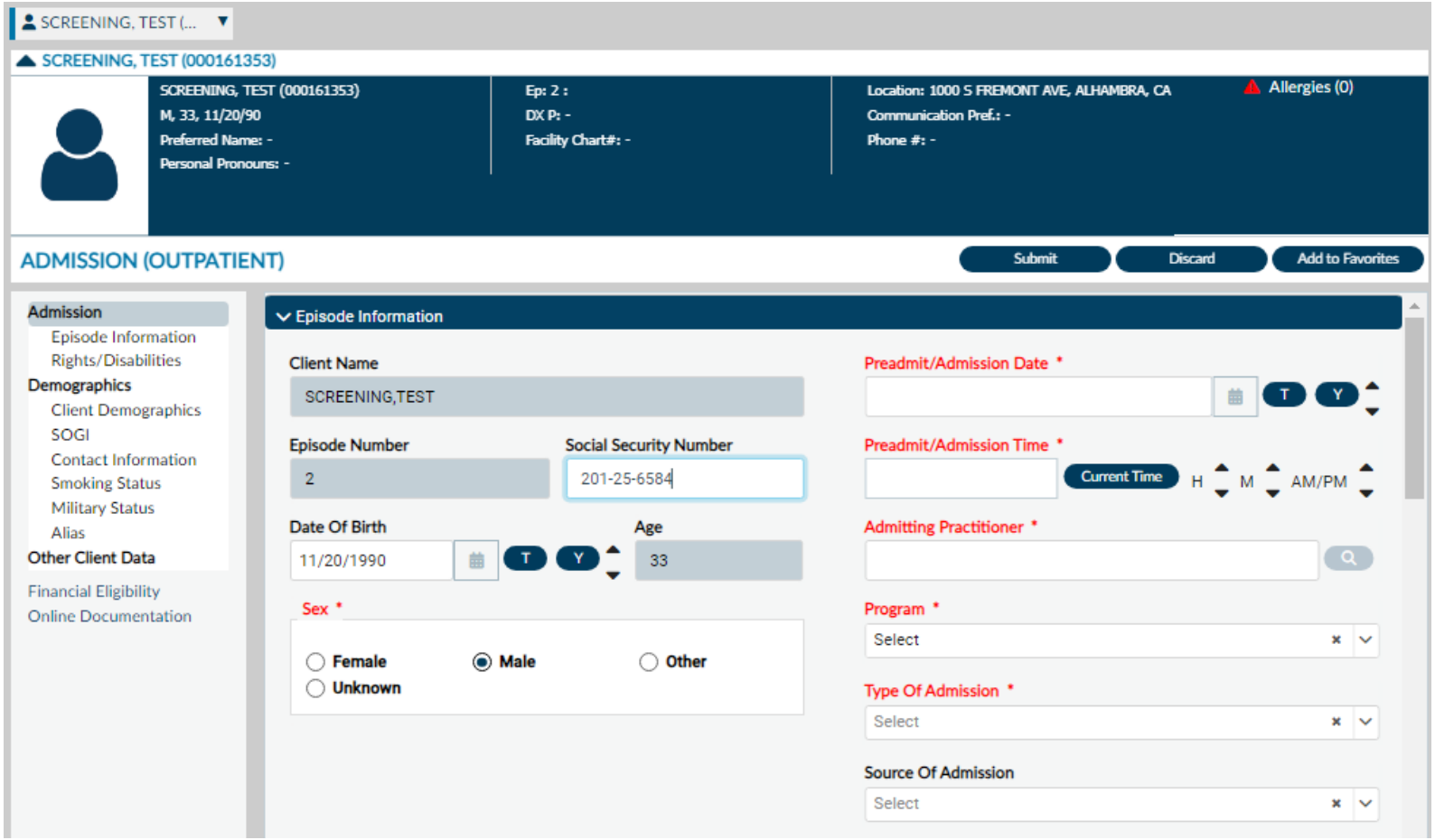
Enter all required fields and the Date of Birth if known to get the highest possible match.

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.

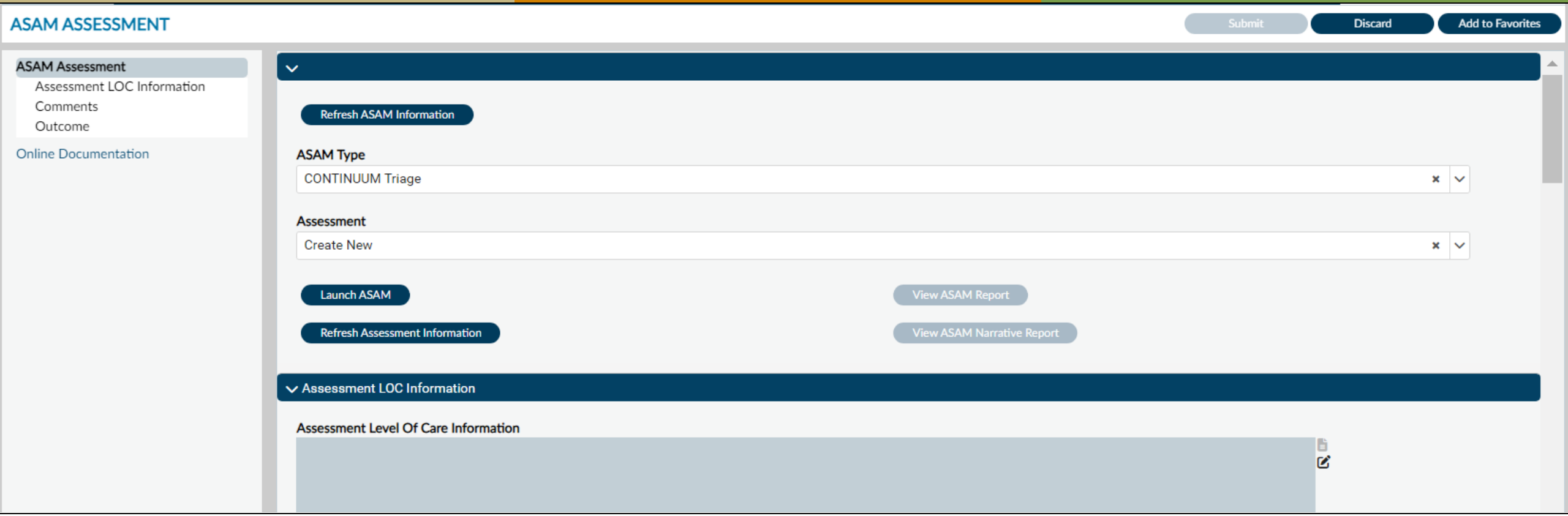
Overview: Admission Form and Demographics



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.

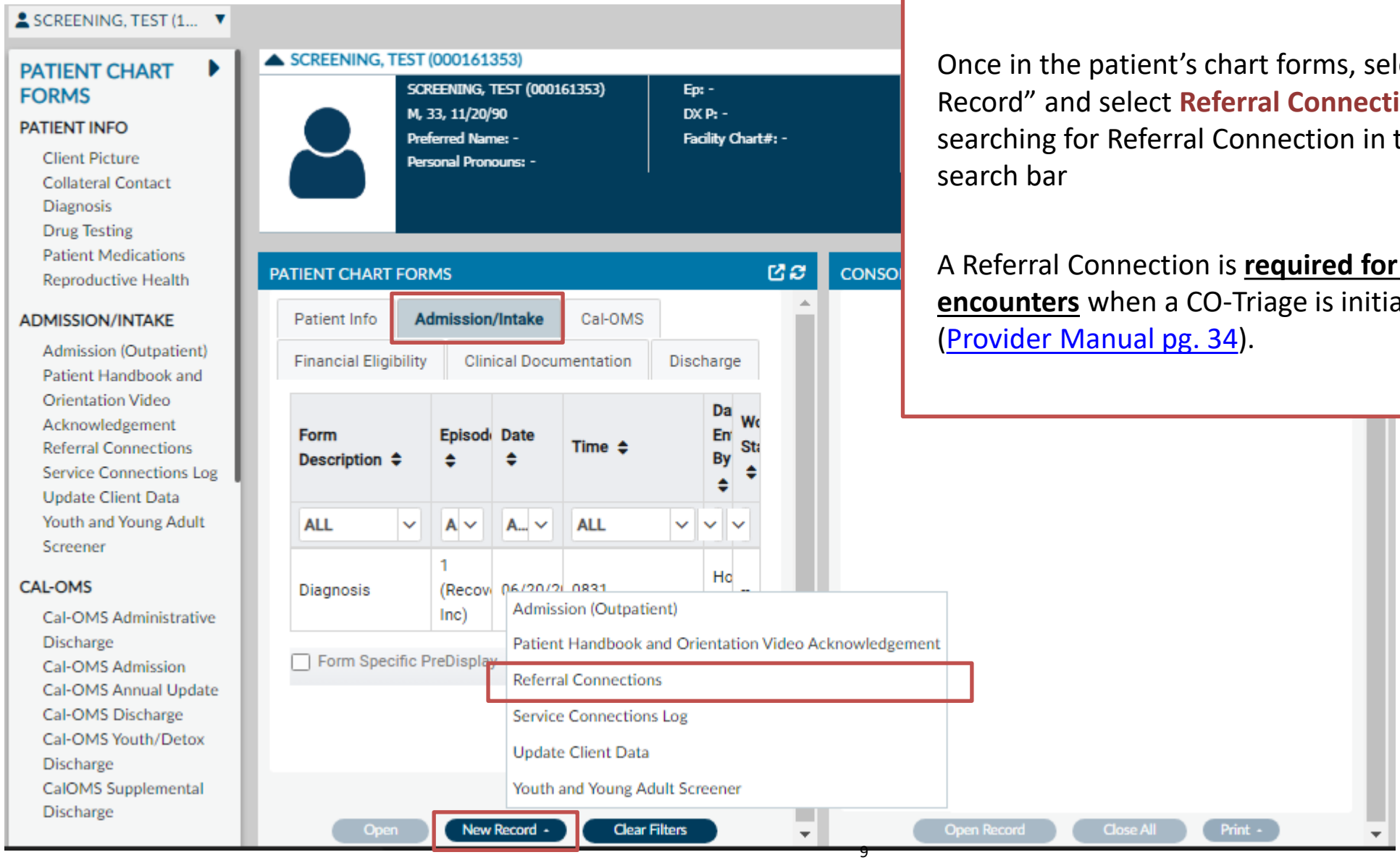
Overview: Accessing the ASAM CO-Triage



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

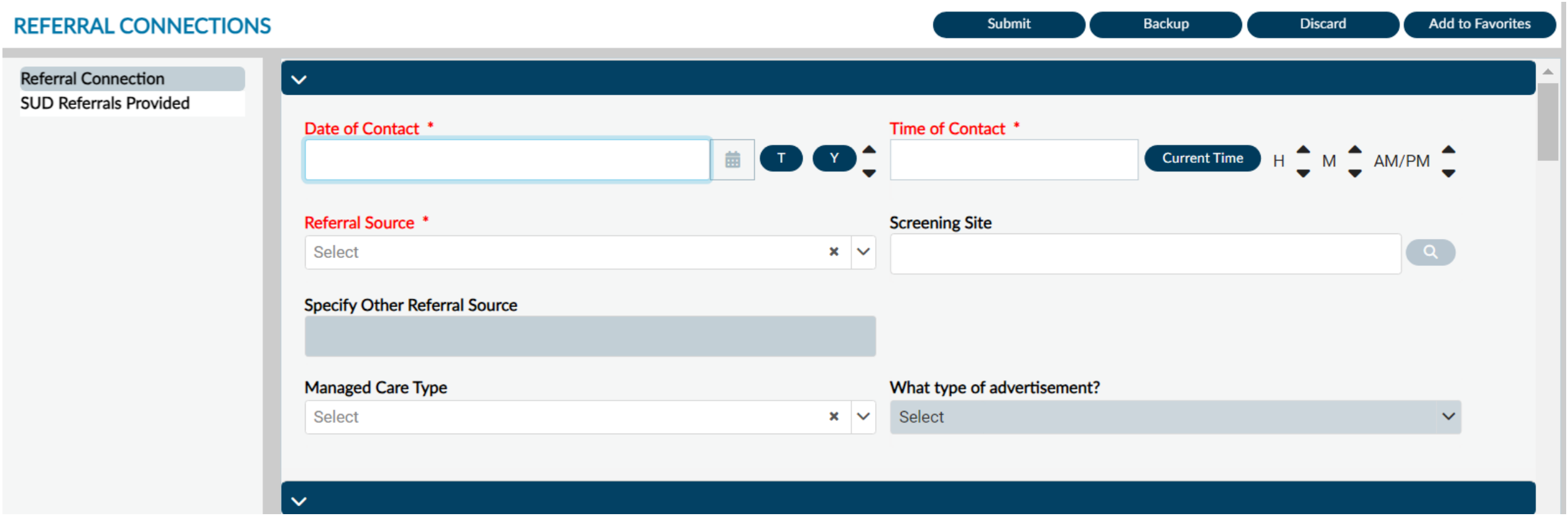
Overview: Referral Connection



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).

Overview: Referral Connection



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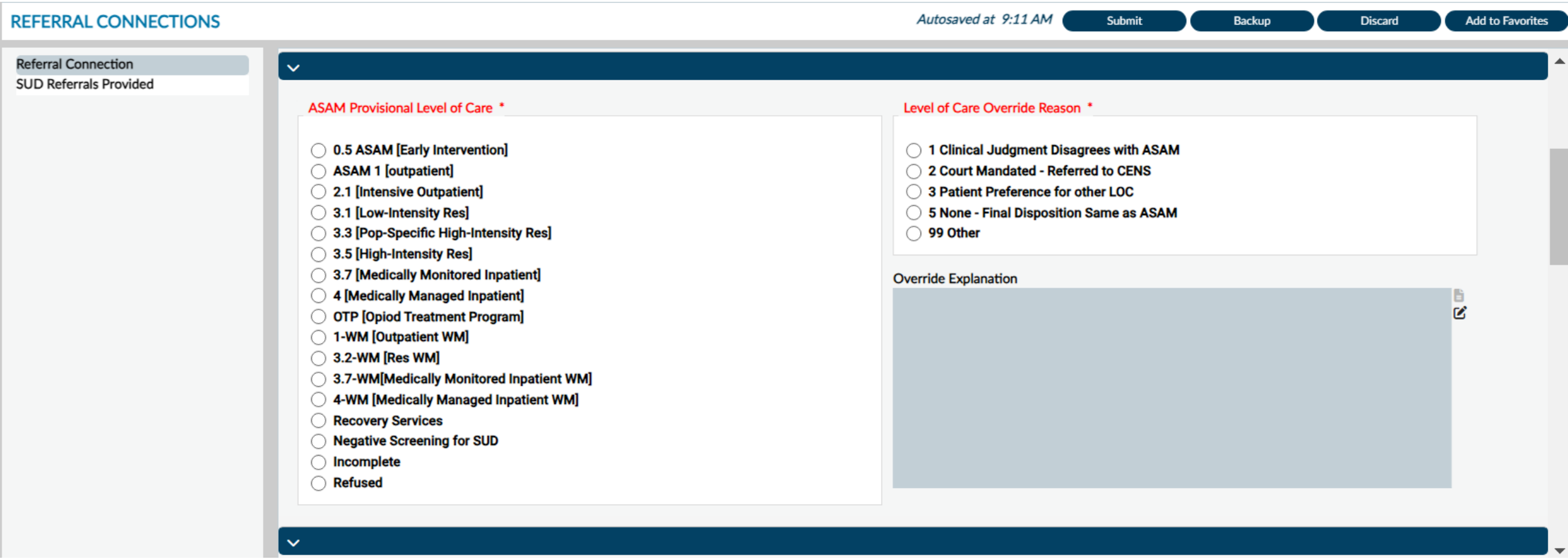

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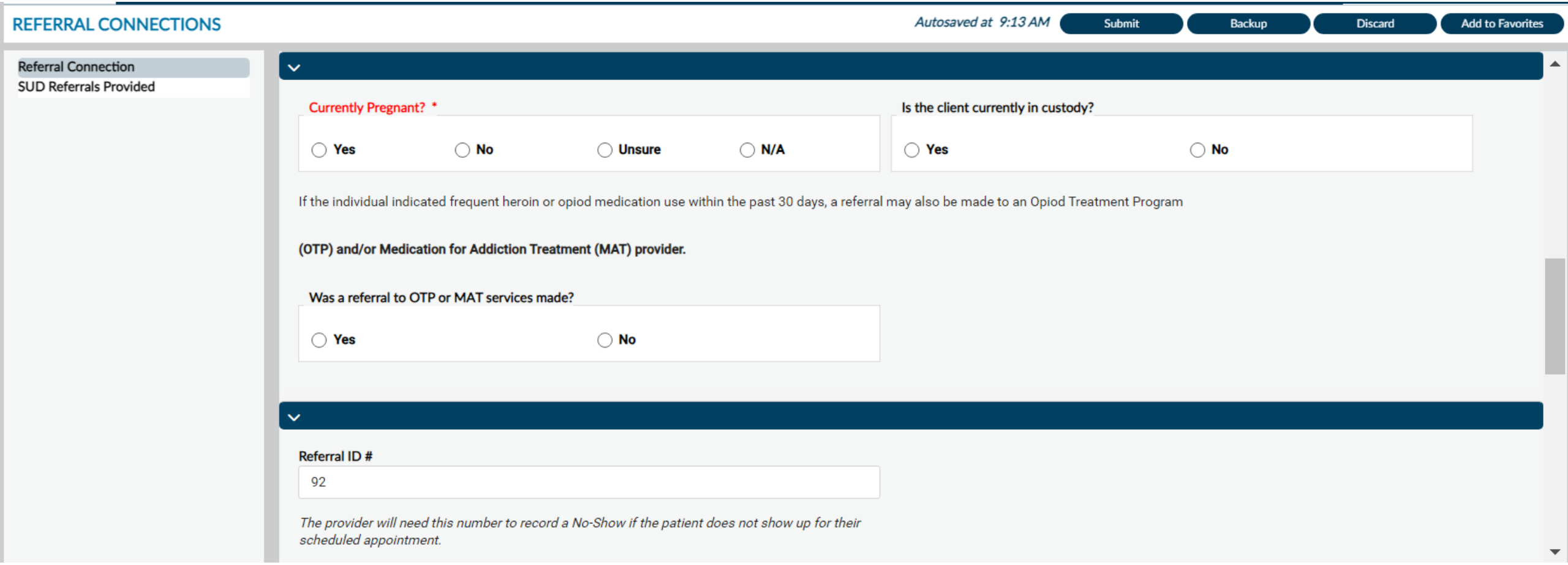

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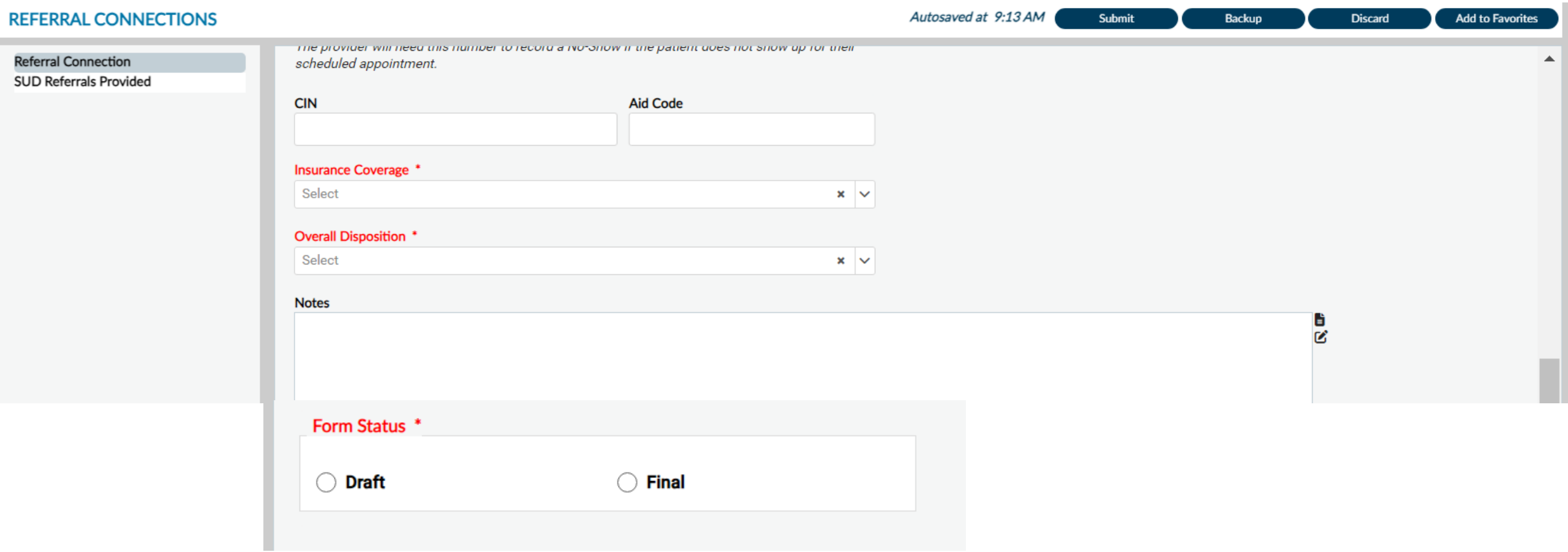

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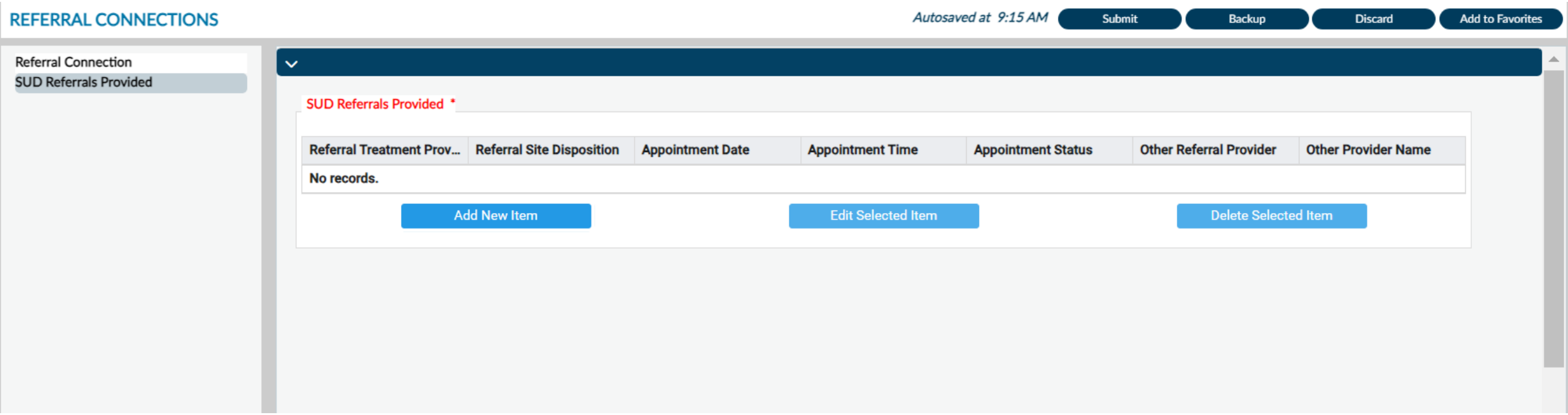

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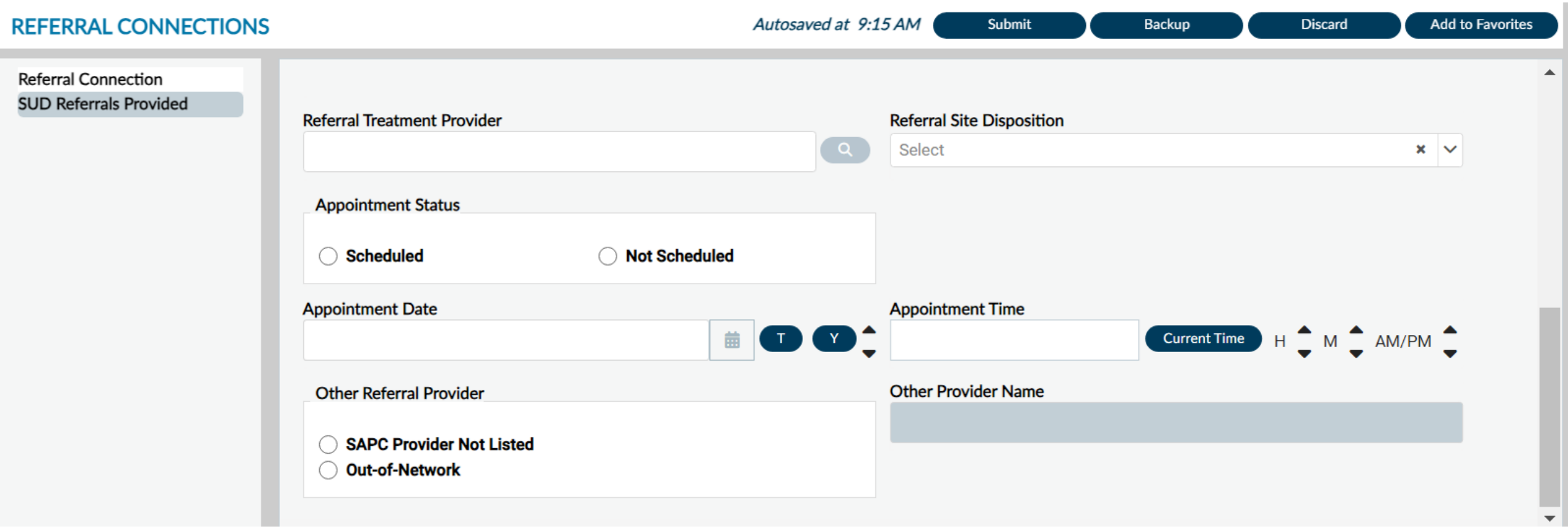
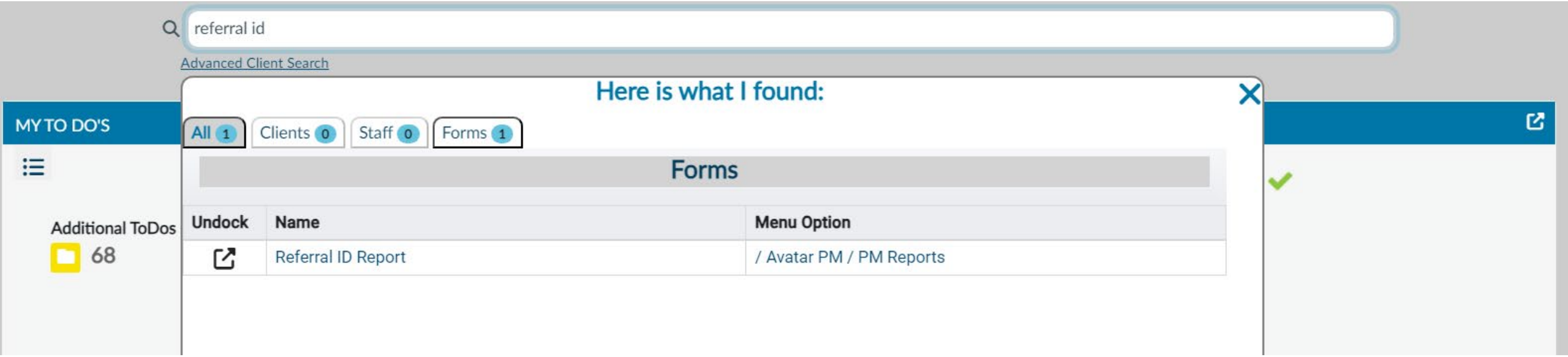
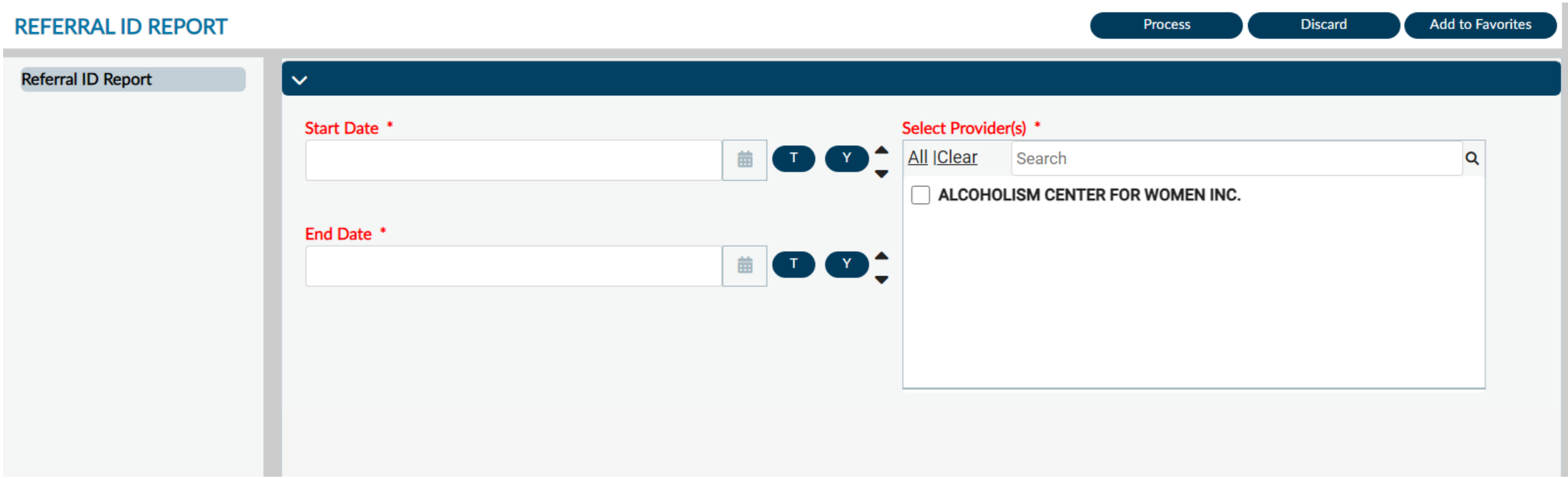


How to access Referral ID Report



Referral ID Report



Referral ID Report

COUNTY OF LOS ANGELES Public Health

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

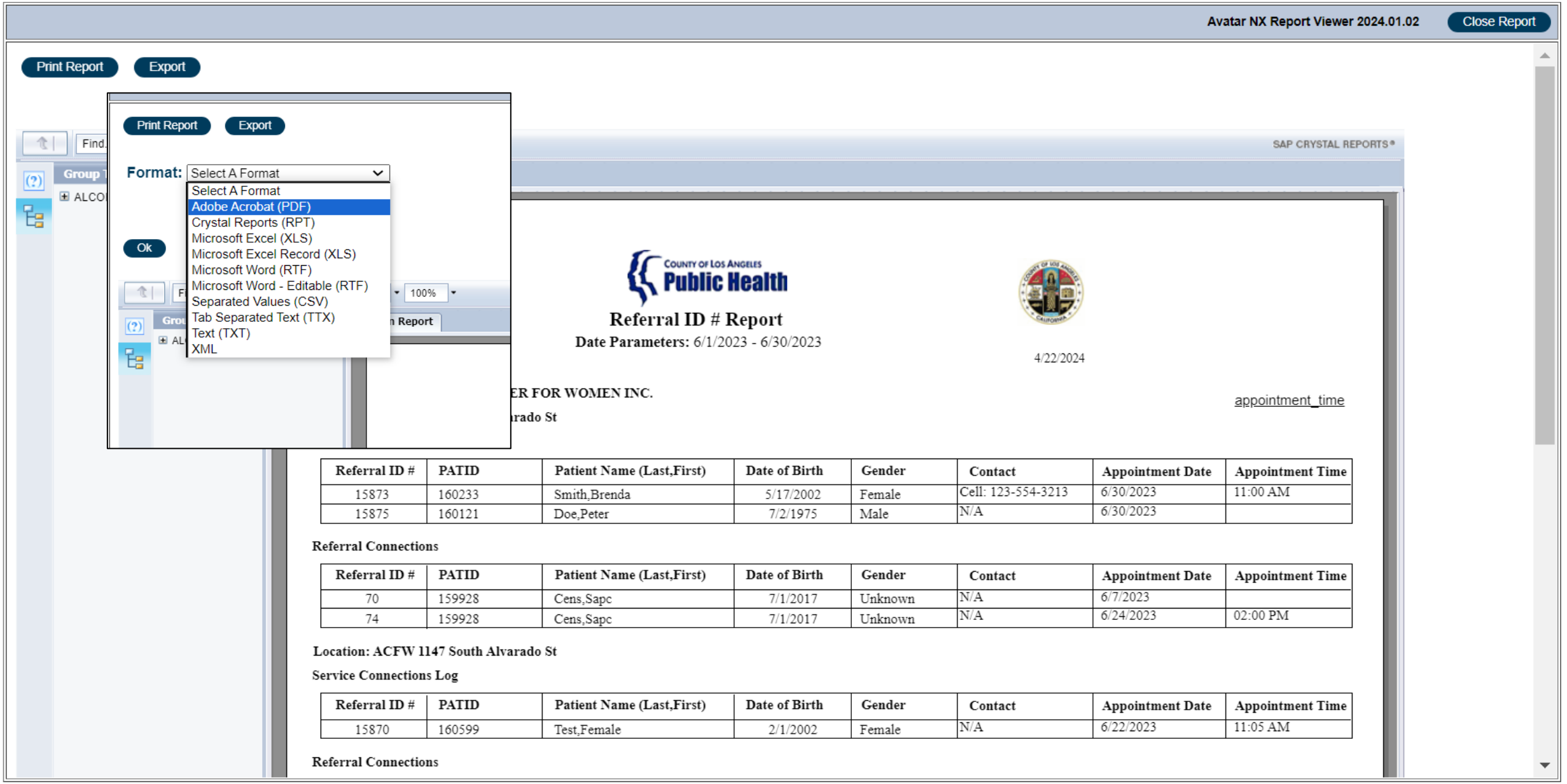
Service Connections Log

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



Appointment Disposition Log

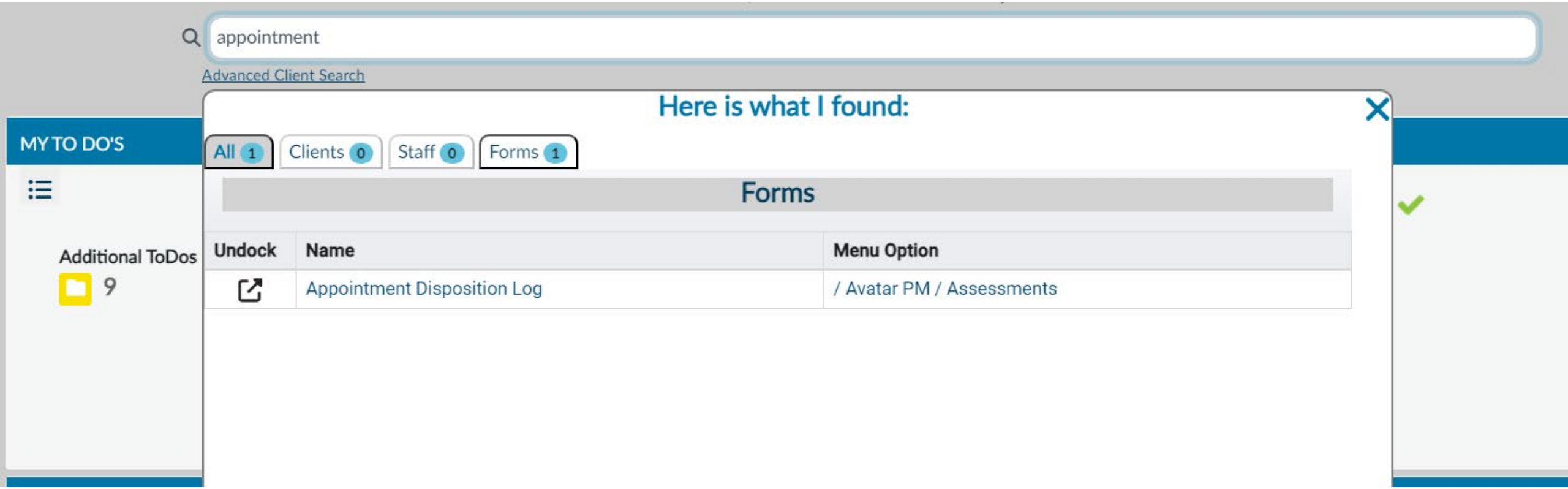
The purpose for Appointment Disposition Log is to tracks client after screening and referral.

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

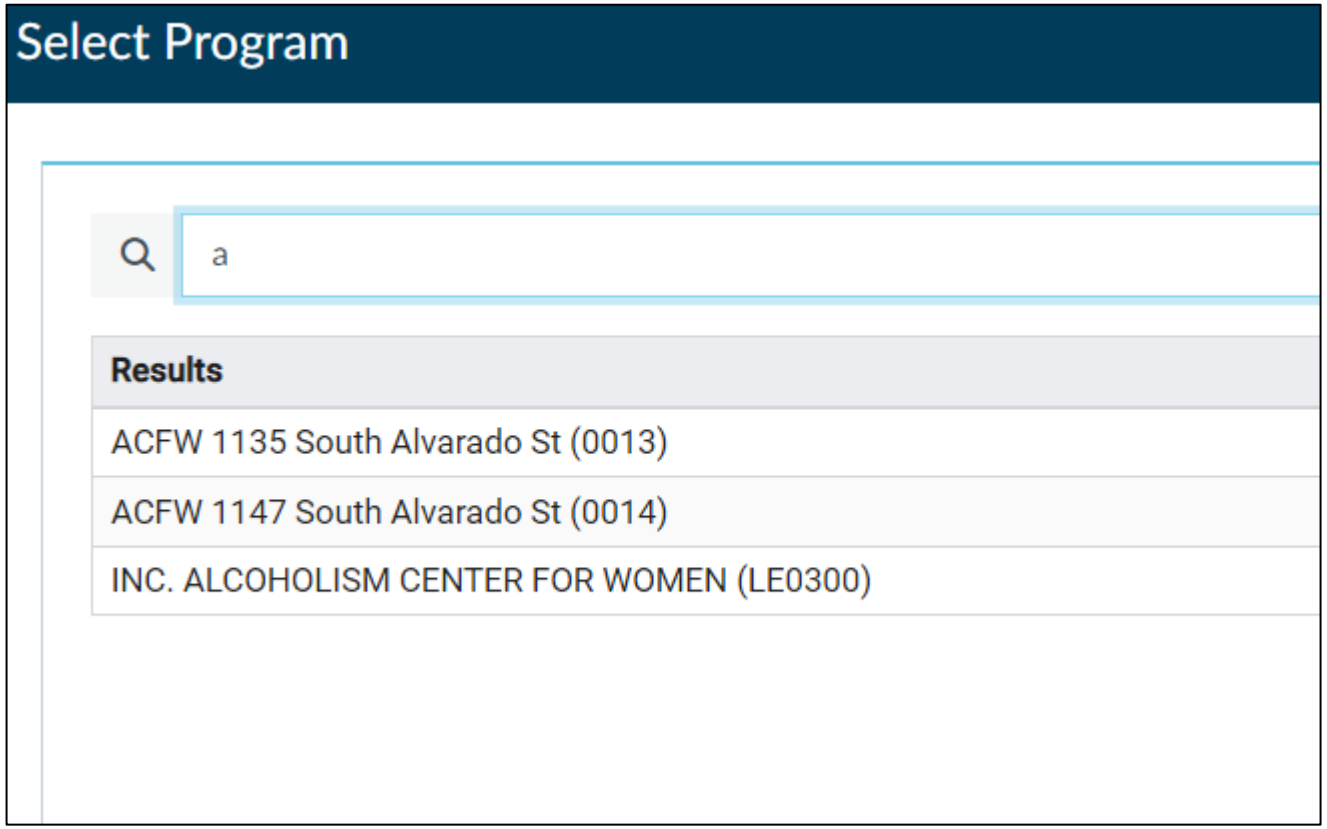
Providers must indicate the outcome of the appointment, including reschedule appointment.

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

Appointment Disposition Log



Appointment Disposition Log



Enter and select agency or site.

Appointment Disposition Log

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

Select Record

Appointmen t 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 (T) (Y)

Appointment Disposition *: No Show - Appointment Rescheduled

Program Site *: ACFW 1147 South Alvarado St (0014)

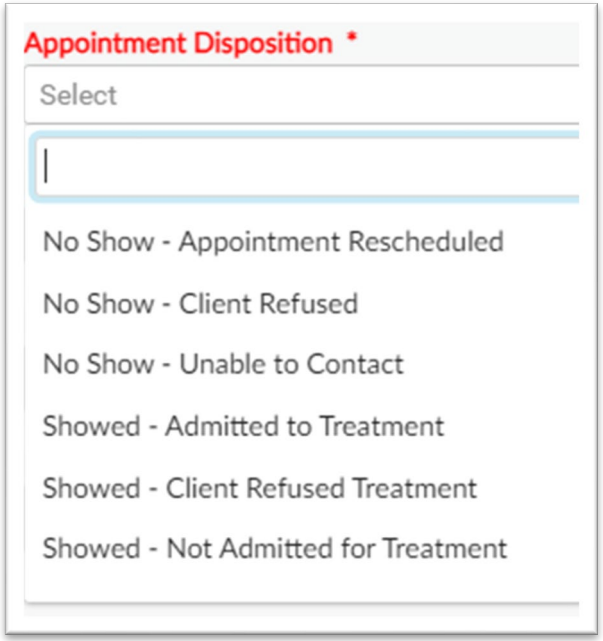
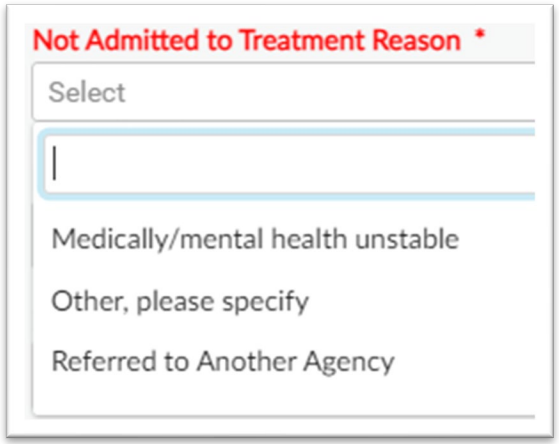
Not Admitted to Treatment Reason: Select

Referral ID Type

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

Please Specify

Rescheduled Appointment Date *: 07/07/2023 (T) (Y)

Referral ID

Referral Connection Referral ID *: 77