Below are the steps for entering PC 1000 clients who have been assessed and are going to be admitted into a SUD treatment program. There are specific indicators in SanWITS for tracking and reporting purposes. Some of these field values have changed as of July 1, 2018 with the onset of ODS. CalOMS reporting is required for all clients receiving SUD treatment services regardless of the individual client’s funding source.

Required SanWITS records: Client Profile, Contact, Intake Screen, ASAM, Admission, Diagnosis, Program Enrollment, Payor Group Enrollment, Annual Update (if applicable), Encounters, and Discharge (Residential – Authorization & Bed Management with Census)

**Getting Started:**

1. **Create Client Profile** –
   - If the client profile already exists in SanWITS, please review for accuracy before proceeding
   - If the client does not exist, select Add Client and complete

2. **Create Contact Screen**
   - Select Contacts from the Navigation Pane and complete
     - **Source of Referral** – select “12-Court/Criminal Justice Referral” (this entry will populate the Intake screen)
     - **Contact Made By** – select “Justice System”
   - Select Save

**Important:** Review for Accuracy before next step - Complete Review. Once the Complete Review has been clicked, the screen will become read only and cannot be edited.

   - Select Complete Review – under Administrative Actions at the bottom left of screen
SANWITS FLOW FOR TREATMENT PC 1000 CLIENTS

- Select Create Intake – under Administrative Actions

**Contact Profile**

- **Client Name:** Participant PC 1000
- **DOB:** 2/5/1985
- **Gender:** Female
- **Unique Client Number:** PP02020585
- **MPI:** SSN: 9902

<table>
<thead>
<tr>
<th>Initial Contact Date</th>
<th>Stop Date</th>
<th>Start Time</th>
<th>Stop Time</th>
<th>Duration</th>
<th>Contact Made By</th>
<th>Benefit Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/2019</td>
<td>1/1/2019</td>
<td>8:05 AM</td>
<td>8:25 AM</td>
<td>21</td>
<td>Justice System</td>
<td>NA</td>
</tr>
</tbody>
</table>

**Contact Reason:** Routine Service

**If Other, Specify:**

**Call Taker:**

**Location:**

**Status:** Completed

**Created Date:** 1/2/2019 9:19 AM

3. **Complete the Intake Screen**
   - **Source of Referral** – will be read only
   - **Risk Categories** – Select “Criminal Justice” and all that apply
   - **Save and Finish**
PC 1000 SUD TREATMENT TRACK

SANWITS FLOW FOR TREATMENT PC 1000 CLIENTS

4. Create ASAM
   - Select ASAM from Navigation Pane and complete

5. Create Admission Record
   - Select Admission from the Navigation Pane and complete
   - On the Admission Profile screen
     - Type of Treatment Service – select what is appropriate value for treatment
     - Submit to CalOMS - select “YES”
On the Admission Administration Screen

- **Special Population Program** - select “PC 1000 Participant” (Note: this field is currently used to identify PC 1000 participants for reporting purposes)
- **How did you hear about us?** – select “5-Any Crim Justice i.e. Probation/Court/Parole/Law Enforcement”
On the Legal/Criminal Justice screen

- **Criminal Justice Status** – select “5 Admitted under other diversion from any court under CA Penal Code, Section 1000”

6. **Create Diagnosis via Admission**
   - Select Edit Diagnosis - Diagnosis must be a SUD Diagnosis and must be designated as principal diagnosis to allow for billing
   - **Type** – Behavioral
   - **Diagnosis** – must be a SUD related
   - **Principle Diagnosis** – Yes
   - **Effective Date** - Will pre-populate to the Admission Date - **Do not change**.
   - **Time**: Will be defaulted to 12:00AM - **Do not change**.

7. **Create Program Enrollment** -
   - Select Program Enrollment from the Navigation Pane
     - Select Add Enrollment
     - **Program Name** – select appropriate Level of Care Program (Note: Do not use PC1000 Education Only)
     - **Start date**: should match the Admission date
     - **Perinatal** – Select the appropriate value – must have corresponding Payor Group Enrollment (Note: this is connected to Perinatal rates on the claim. Select No if the provider is not able to provide and bill DMC for Perinatal services)

   - **Residential Facilities** - Check for Bed Availability before completing Program Enrollment for new clients
8. **Create Payor Group Enrollment** – if billing DMC
   - Select Add Benefit Plan from Navigation Pane and complete
     - **Payor-Type** – Medicaid
     - **Plan Group** – Should be either “ODS DMC Non-Peri” OR “ODS DMC Peri”

   Residential Facilities - Only:
   - Select Add Government Contract Enrollment
     - **Payor Group**: Select from 3 payor plans - DMC Billable, County Billable or Justice Override
     - Best Practice - Consult with Optum before adding
SANWITS FLOW FOR TREATMENT PC 1000 CLIENTS

9. Create Encounters:
   o OS, IOS, and Case Management services - Select Encounter from the Navigation Pane and Complete for each service as applicable
   o Residential Bed Day services – create through the Census

10. Create Annual Update - if applicable
    o Select Annual Update from the Navigation Pane and Complete- refer to timeline requirements

11. Create Discharge -
    o Select Discharge from the Navigation Pane and Complete as applicable

   Please note: Program enrollment must be end dated for a user to discharge a client. The end date should be the same as the discharge date.

For help with Residential Authorization, Bed Management, and Census please contact
SUD_MIS_Support.HHSA@sdcounty.ca.gov