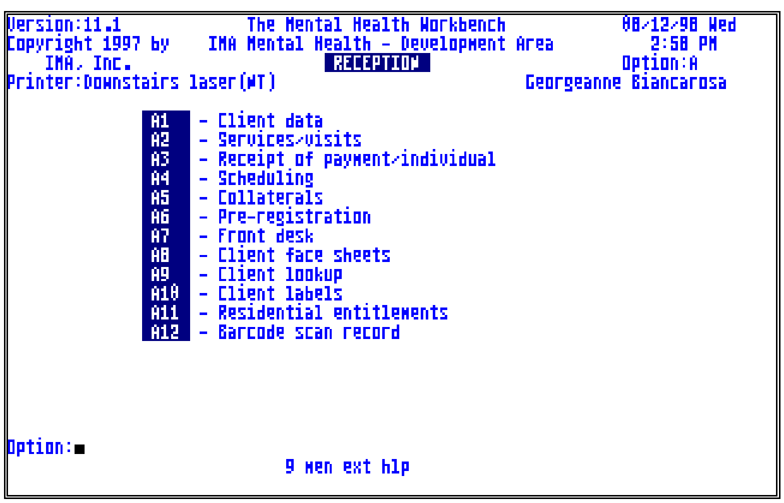
Registration

Overview

The process of registering a new client for treatment has many steps. It begins when a referral is received and ends after the assessments have been completed and a decision is made to enroll the client into treatment. The following parts of registration are covered in this section.

- Pre-registration.
- Client Collaterals.
- Assessment visit.
- Update client data.
- Program enrollment.

All of these options for registration are found in the **A** Sub-menu: Reception.



The A Sub-Menu: Reception.

Pre-registration

```
             IMA Mental Health - Development Area  Option:A6
                          Pre-registration

             WA - enter telephone narrative

             RE - register new client

             AW - add narrative to existing client

             SH - show data on screen

             CH - change data

             PW - print narrative assessment form

             PF - print fee statement



Option:
                         2 men
```

Option listing of A6: Pre-Registration.

Pre-registration can begin as early as the initial phone call that the client makes to initiate treatment. The information collected can be entered directly on-line. This information is used to start the client record, schedule an appointment, and print a telephone intake form.

Register a New Client: RE

The initial pre-registration usually starts with option **RE**. Although a full screen of information can be entered, only the name, sex, and date of birth are required. Many of the other fields can be filled with pre-defined defaults or completed later by the agency designee. After completing the screen, a free form memo box is displayed to take additional information about the referral. This narrative will be either a blank memo box or filled with a template as defined by the agency. This narrative becomes the first page of the first assessment when the assessment folder is created in **B-6**.

Different forms or templates can be utilized within the narrative screen for different intake types. At the initial selection screen for **RE**, a program and intake type are designated. This will load the appropriate form to be completed within the narrative screen.

The default telephone screening narrative is defined in control file **TELSCR.ASM**. This is the template/form loaded when a corresponding template does not exist for the code indicated or when no Intake type is specified. Table **INTTYP** contains the codes for the different possible agency intake forms. Each subsequent form/template is defined in files called **TELSCR.<INTTYP code>**.

Intake Type is based on a table of associated codes. The corresponding template is defined within a control file that is related to that code. The default narrative template is defined in TELSCR.ASM.

```
                    IMA Mental Health - Development Area  Option:A6 -RE
                              Pre-registration

















                                                 Screening Information
Client:  2746                    Program:S           Intake type:MH
                             2 men ext hlp  bck fwd
```

The initial screen at A-6 RE

```
                    IMA Mental Health - Development Area  Option:A6 -CH
                              Pre-registration

Client:  2651  Client, Test                      Program:S /   1

 Last name:Client                  Home/work phone:212-555-5000 /212-555-4545
First name:Test                     Cultural ident:R
    D.O.B.:01/05/65  Age: 33      Type of residence:4
       Sex:F                          Living circum:N
       SS#:123456789                Referral source:3
   Address:100 Manhattan Avenue       Referral type:
          :Manhattan, NY              Referral date:02091998
 Municipal:NYC  County:31                  Location:03
       Zip:     -                          Division:??
     Ethnic:6                     Primary diagnosis:V71.09
 Self pay schedule:0                    Medicaid ID:AA12345A
             Level:1                    Medicare ID:123456789AB
Other insurance(1):     Acct/grp:              /           Hold:    Exp:
Other insurance(2):     Acct/grp:              /           Hold:    Exp:
     Billing order:MC MD                      Token:Y
         Counselor:DSF                  Intake date:02091998

R(egist), N(arrative), A(ppt.), C(ollaterals), B(illing)?
                             1 men ext  bck  req
```

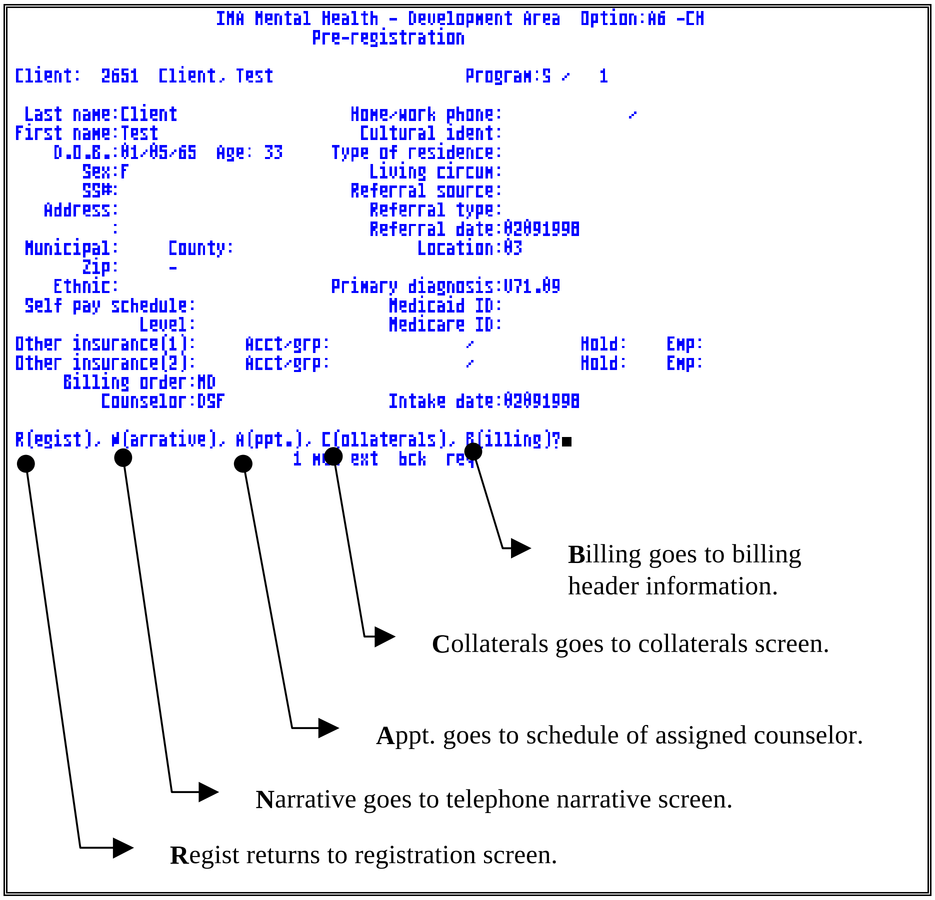
The Pre-registration screen: A6-RE.

The Telephone Screening Narrative is defined per agency Intake Type in Table INTTYP and within corresponding TELSCR.<code> files.

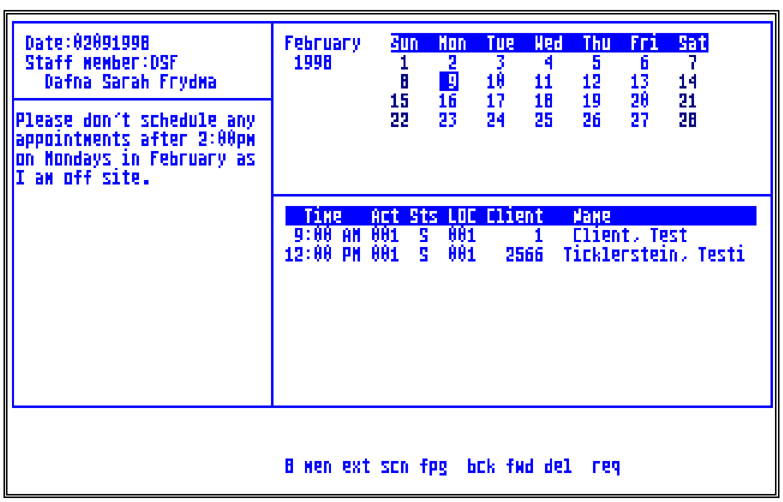
```
                    IMA Mental Health - Development Area  Option:A6 -CH
                              Pre-registration

Client:  2651  Client, Test                      Program:S /   1

 Telephone screening

        Reason for call:Ct. reports having anxiety and sleeplessness
 for the past month.

        Was referred by:Self

        Current emergency:Ct. reports unable to work and care for self
 / family due to reported anxiety and sleeplessness.

        Medical plan:Medicaid






                             70 x 300 men ext scn bpg fpg bck fwd
```

The Pre-registration free form narrative attached to A6-RE.

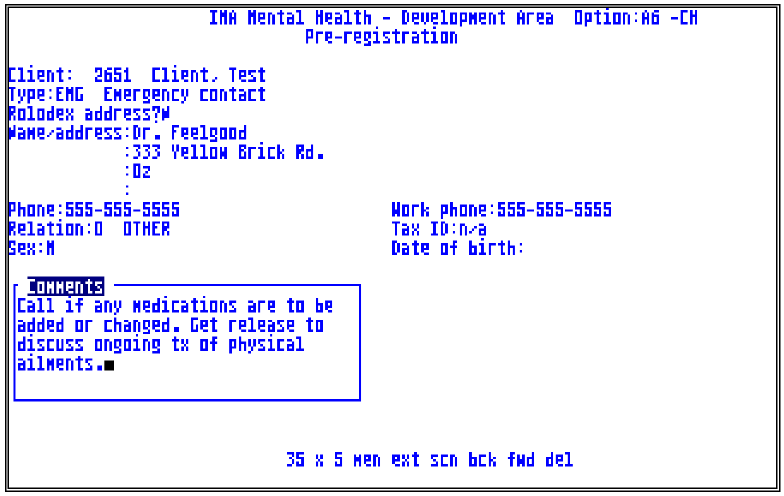
The other related screens: **R**egister, **N**arrative, **A**ppointment, **C**ollaterals and **B**illing are attached to the pre-registration screen and can be entered by typing the corresponding code and pressing <**enter**>. Returning to the pre-registration screen is accomplished by exiting the previously chosen screen. The same options are available in the **CH** or change option.



The previously shown pre-registration screen. Notice the Help Message listing the other available options.



Staff schedule for assigned counselor for client accessed through Appt. at A-6 RE.



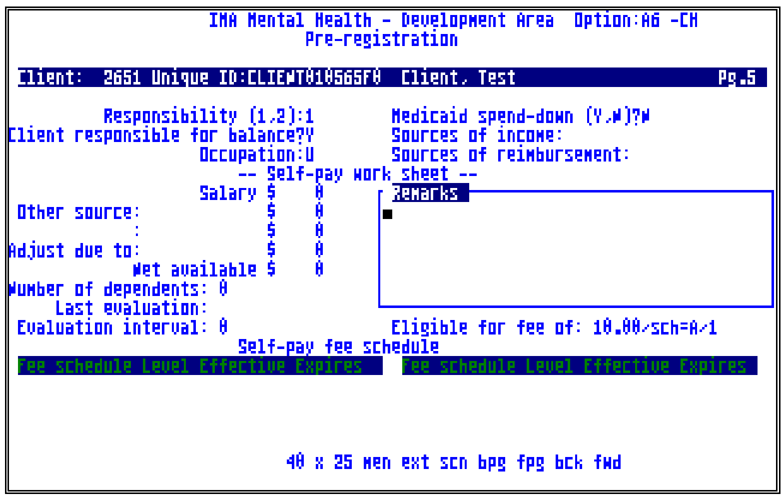
IMA Mental Health - Development Area Option:A6 -CH
Pre-registration

Client: 2651 Client, Test
Type:EMG Emergency contact
Rolodex address?N
Name/address:Dr. Feelgood
:333 Yellow Brick Rd.
:Oz
:
Phone:555-555-5555 Work phone:555-555-5555
Relation:O OTHER Tax ID:n/a
Sex:M Date of birth:

Comments
Call if any medications are to be
added or changed. Get release to
discuss ongoing tx of physical
ailments.

35 x 5 men ext scn bck fwd del

Client collaterals are entered in A-6 RE at the time of registration through Collaterals.



IMA Mental Health - Development Area Option:A6 -CH
Pre-registration

Client: 2651 Unique ID:CLIENT010565F0 Client, Test Pg.5

Responsibility (1,2):1 Medicaid spend-down (Y,N)?N
Client responsible for balance?Y Sources of income:
Occupation:U Sources of reimbursement:
-- Self-pay work sheet --
Salary $ 0 Remarks
Other source: $ 0
: $ 0
Adjust due to: $ 0
Net available $ 0
Number of dependents: 0
Last evaluation:
Evaluation interval: 0 Eligible for fee of: 10.00/sch=A/1
Self-pay fee schedule
Fee schedule Level Effective Expires Fee schedule Level Effective Expires

40 x 25 men ext scn bpg fpg bck fwd

Client Billing Header entered through Pre-registration in A-6 at Billing.

Telephone Narrative: NA or AN

If the telephone screening narrative information is not available from the client at the time of the initial contact as recorded in **RE**, the narrative may be deferred to a later time. This is done by answering **N**o to the **'Continue with Narrative?'** prompt. When the information becomes available, it can be added to the registration data with option **AN**. Options **NA** and then **AN** can be used when the incorrect Intake Type was specified originally.

```
                 IMA Mental Health - Development Area  Option:A6 -RE
                           Pre-registration

Client:  2651  Client, Test                    Program:AF

 Last name:Client                Home/work phone:212-555-5000 /212-555-4545
First name:Test                   Cultural ident:R
    D.O.B.:01/05/65  Age: 34     Type of residence:4
       Sex:F                        Living circum:M
       SS#:123456789             Referral source:
   Address:100 Manhattan Avenue   :Referral type:
          :Manhattan, NY          Referral date:01281999
 Municipal:NYC  County:31              Location:03
       Zip:     -
    Ethnic:6                     Primary diagnosis:799.9
 Self pay schedule:0                  Medicaid ID:AA12345A
             Level:1                  Medicare ID:123456789AB
Other insurance(1):AETN Acct/grp:dgb001       /abc123    Hold:CLT Emp:
Other insurance(2):     Acct/grp:             /          Hold:    Emp:
      Billing order:CL 01 MD                    Token:Y
         Counselor:GB                     Intake date:01281999

Continue with narrative? (Y,N)
                             i men ext  bck  req
```

Opportunity in RE to defer taking the telephone screening narrative information.

Additionally, a narrative can be entered into the system even before the client demographic data is entered. It can then attached to the client when the client data is subsequently entered and given a number. The telephone narrative is completed in menu option **NA**. The same narrative as above is presented, based on the specified Intake Type. It can then be attached to an existing client if it is determined that the client has been previously enrolled through **A-6 AN** or attached to a new client by exiting the narrative screen and going into **RE** to register the client as new.

Note: When the narrative is completed before the registration data, the registration data must be completed before another client is registered by that operator. Otherwise the previous client narrative will be lost.

Narrative assessment form: PN

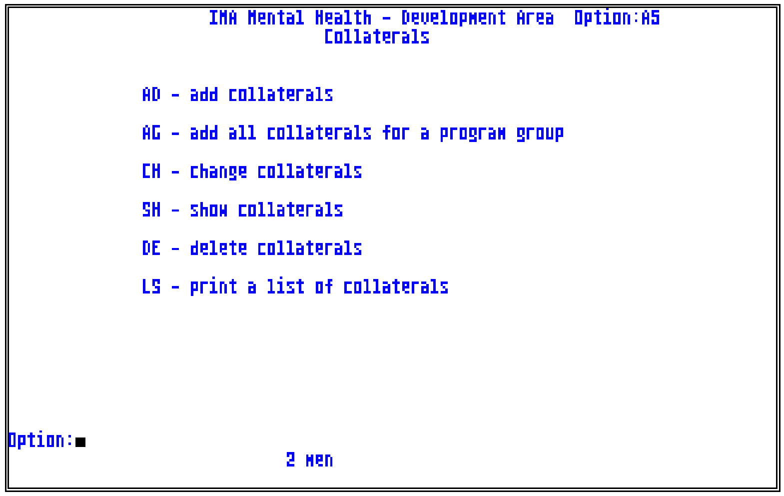
The narrative assessment form is a single page face sheet that contains both the client data and free form telephone narrative information about the new client. It is printed at **PN**.

Fee statement: PF

The fee statement can be configured to print a client contract with the sliding scale fee that will be charged for different services that the client might receive. This can be printed in **PF**.

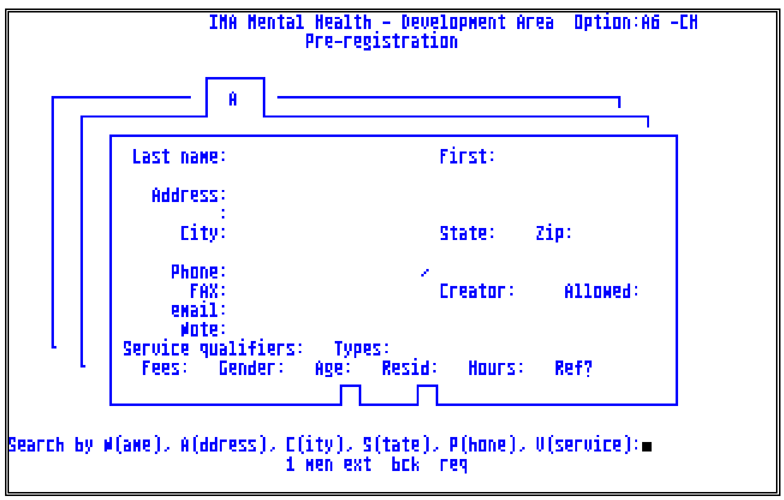
Client Collaterals

Every client can have a personal listing of individuals for collateral contacts. Collaterals can be added at the time of registration as shown above. Client collaterals can also be accessed for revision in either **A-6 CH** or through **A-5**, where there are separate screens of information available for each collateral.



The A-5 Collaterals sub-menu.

Client collaterals may also be added to the user's Rolodex. This is particularly useful if correspondence with this collateral is likely or if several clients share the same collateral. The collateral can then be selected from the Rolodex, without needing to be reentered per client or at the time of generating correspondence. Use the **<Pop>** function key to add the collateral to the Rolodex and then select it from the Rolodex search screen below.



The screen for searching for client contacts in the Rolodex.

A unique set of collateral types can be entered for each program group. Program groups are defined in file **CCTMNT.DAT** in the System Administration (**H**) Sub-menu. These collateral types could include emergency contacts, primary care physician, significant others, responsible party or any other such contact the agency is interested in tracking. The System Administration control file sets up a pre-fill for each contact type on the Rolodex card.

Assessment visit

Clients entered through pre-registration usually need to be scheduled for an assessment visit. Three things need to be done for this visit: Choose a counselor, schedule a visit, record and document the results of the visit.

Choose counselor -- This choice can be predetermined or based on schedule loads. While in that pre-registration screen the user can use the <**Pop**> key to look at the load screens or individual staff schedules.

Schedule visit -- Once the counselor is chosen, the counselor's schedule can be accessed from the pre-registration screen to schedule the assessment visit appointment. Details on using scheduling are explained in a special chapter dedicated to the scheduling system.

Document visit – In addition to the standard progress note that will be written to document the visits, an assessment folder can be initiated to begin documenting the assessment process. This is done in the assessment sub-menu (**B-6**) and is covered in the Clinical Chapter of this manual.

Update client data

Additional information about the client can be added at any time. This is done in a number of different ways. If data is entered in the assessment it will automatically update the database. Other information can be added in the Client data menu (**A-1**). The change option (**CH**) will show the entire database while the quick-change option (**QC**) shows a limited subset of fields. Intake, Discharge and Transfers are also handled in **A-1**. Other necessary changes can also be made for the billing header and tickler dates, as well as accessing specific fields to change without the full history screen.

```
                    IMA Mental Health - Development Area  Option:A1
                                Client data

Intake/Discharge:                       Changes in program data:
  IW - Full intake                        AP - Add a new program
  QE - Quick entry intake                 QA - Quick add program
  TR - Transfer from Pre-intake           PD - Medicaid spend-downs
  TM - Terminate a program/Discharge      MD - Medicare deductibles
  RO - Cancel a TM done in error          PH - Program hours to date
                                          VA - Managed care authorization
                                          VS - Managed care visits to date
Changes:                                  ER - Extension request issued
  CH - Change data in record              EA - Extension authorization received
  QC - Quick change                     Lookup:
  CO - Correct data w/o history           SH - Show full client data
  CW - Change name and ID fields          HI - History lookup
  CB - Change/create billing header       BL - Billing header lookup
  TD - Change tickler dates               AL - Authorization lookup
  CU - Change user defined fields         CS - Statistics lookup
  PC - PCS demographics                   RS - Residential services lookup
                                          CR - Central registry lookup

Option:■
                              2 men
```

The A-1 Sub-menu: Client Data.

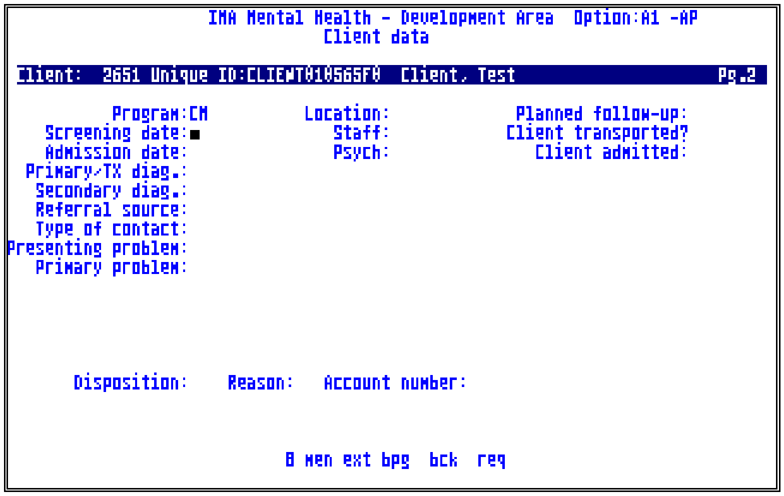
Additionally, the Client Data Sub-menu provides the user with the opportunity to look-up several screens of information on any client when a quick reference is needed. Editing is not permitted in any lookup screen as typing is locked out for that option in those screens.

Program Enrollment

After the assessment is completed the client will either be enrolled in a treatment program or terminated. These changes are also documented in the client data sub-menu (**A-1**).

Adding a Program

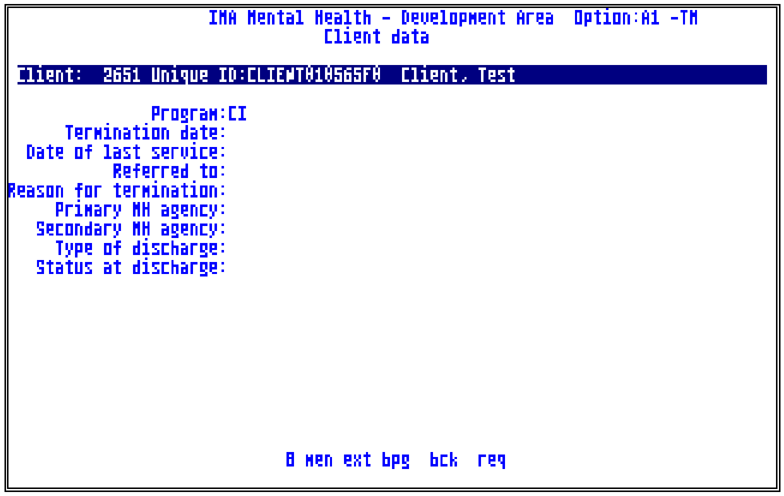
Clients are added to programs in the **A1-AP** option. The program name, admission dates and screening dates are to be entered. The program data type determines the exact layout of this program screen.



The A-1 AP screen to add a program. The program name and other information about the client are needed.

Program Termination

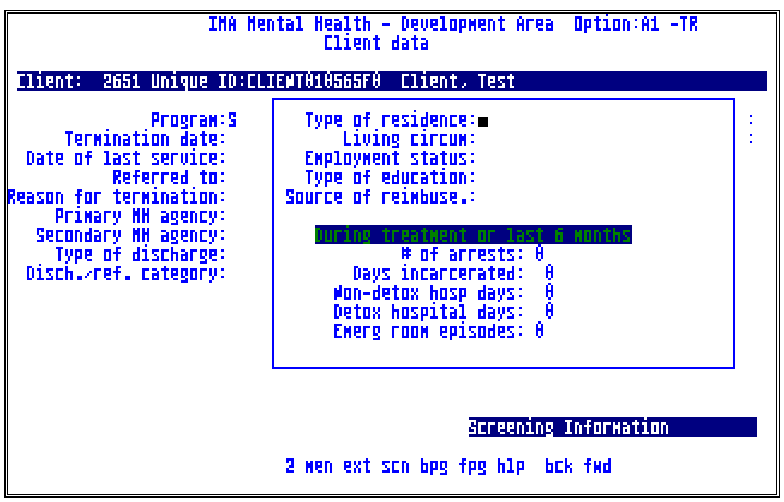
Clients are terminated from current programs via the **A1-TM** screen. During the termination, the user is asked to update some relevant fields in the client database such as diagnosis, residential setting, and employment status. In chemical dependency type programs the fields needed for the OASAS discharge forms are also entered. Many of these fields are based on a 1-5 rating scheme as indicated on the OASAS form. If these forms are not used, fill these fields with "1".



The A-1 TM screen for terminating a client from a program.

Transferring Between Programs

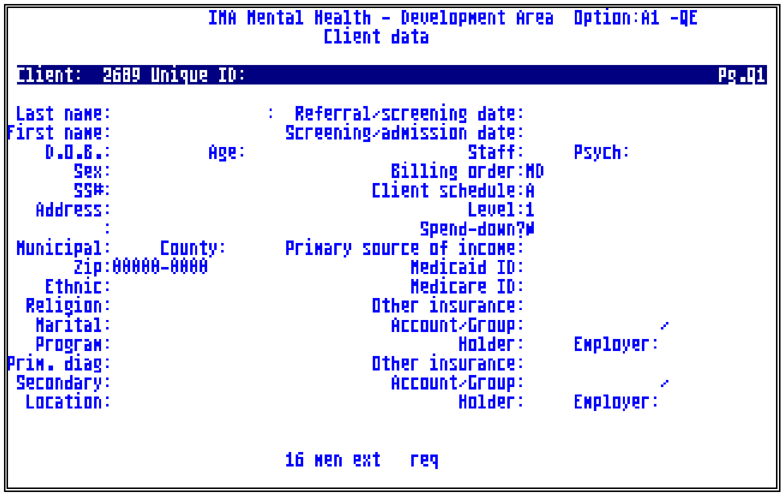
A client can be easily transferred from one program to another by using option **A1-TR**. This does both a termination from the current program and the opening of a new program. Once a client is chosen, the program to terminate is selected. Once the necessary fields have been completed, the client is then added to the second program where the required data is entered.



The A-1 TR screen to transfer a client from the Screening program to another full-time program. There is required information to terminate from one program and enroll in another.

Loading Clients: Getting Started on IMA

To load clients onto the system and get started using the IMA Workbench, a quick entry option has been created. **QE** in the **A-1** sub-menu provides the agency with the tool to get clients loaded onto the system with the minimal data required for billing, including basic demographics, program enrollment and screening and admission dates. Once this process is completed, services can be recorded and billed and the rest of the on-line record can be built.



The A-1 QE screen for entering clients on the system to get started with IMA.