

# SanWITS Flow for Residential and Outpatient Providers

## “Clients Assessed but Not Admitted to the Facility”

*(Excludes NTP/OTP Providers)*

- **Complete a client profile (if one exists in the agency, review for accuracy and edit as necessary)**
- **Complete a contact screen**
  - Review for accuracy, Click on Complete review, then click Create Intake
- **Complete the Intake screen**
  - In order to complete a program enrollment the Intake/case must stay open
  - 1<sup>st</sup> offered Tx Appt date and 1<sup>st</sup> Accepted Tx Appt date = Leave blank
  - The Intake will show as “in progress” on the activity list but this will not prevent entering a program enrollment or encounter
  - Save and Finish
- **Complete the “Assessed Not to be Admitted” client program enrollment**
  - Start date = same as Intake date
  - Save and Finish
- **Complete the encounter**
  - Note type = County Billable
  - Billable = No
  - Start time and end time must be entered on the encounter in order to claim on the invoice to the County
  - Save and Finalize the encounter
- **Go Back to the Program enrollment**
  - End Date = same as Intake date
  - Termination Reason = Other
  - Save and Finish
- **Go Back to the Intake screen**
  - Enter the Date Closed – this should be the same as the intake date
  - Enter Closure Reason – “Client left/or Referred Out”
  - Click hyperlink for Save and Close Case
  - Click Finish