

Courtesy Dosage program enrollment is for a client that is admitted to a different OTP facility within California. This program enrollment is only to be used for Methadone dosing and can be used up to 30 days.

If the client is going to be admitted to the facility, the Courtesy Dosage PE must be end dated, the Intake closed, then a new episode/Intake must be opened with an OTP program enrollment.

INSTRUCTIONS

1. **Client Profile –**
 - Complete required fields
 - If a client profile exists in the agency, review for accuracy and edit as necessary
2. **Contact Screen –**
 - Complete required fields
 - Disposition = Made an Appointment
 - Review for accuracy, click on Complete Review and then click Create Intake
3. **Intake screen –**
 - Complete required fields
 - 1st, 2nd, and 3rd Available TX Appt date and the 1st Accepted TX Appt = Leave Blank
 - Save and Finish
 - The Intake will show “In Progress” status on the Activity List but this will not prevent entering a Program Enrollment or encounter to bill
4. **Admission – Do not complete an Admission Record**
5. **Discharge – Do not complete a Discharge Record**
6. **Diagnosis –**
 - Complete a primary Diagnosis with DSM-5 descriptor through the Diagnosis List
7. **Benefit Enrollment Plan under Payor Group Enrollment –**
 - Complete the Benefit Enrollment Plan under Payor Group Enrollment according to the client’s benefit

8. Program Enrollment –

- Complete the “OTP Courtesy Dosage” Program Enrollment
 - Start Date = Same as Intake Date
- Perinatal – Select Yes for females that are receiving perinatal services from a facility that is certified to provide perinatal services and is contracted with the County to provide these services
 - All other instances for females, select No

9. Encounters/Services –

- Complete encounters for Methadone dosing services and release to billing

10. Once Completed with Courtesy Dosage Services and billing –

- Go back to the Courtesy Dosage Program Enrollment
 - Enter the End Date
 - Enter the Termination Reason and Notes
 - Save and Finish

11. Close the episode/Intake –

- Go back to the Intake screen
 - Enter the Date Closed (This should be the same as the Courtesy Dosage Program Enrollment End Date)
 - Enter Closure Reason – “Completed Courtesy Dosing”
 - Click hyperlink for Save and Close Case
 - Click Finish

NOTE:

Courtesy Dosage Program Enrollment must be end dated within 30 days from start date.