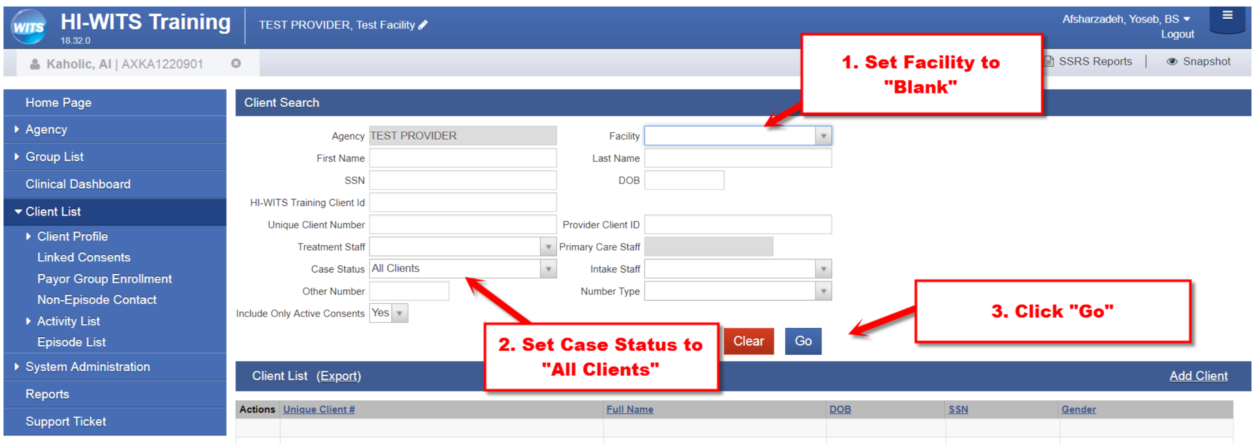
HI-WITS Training: Add A New Client for LEAD

Lesson 1

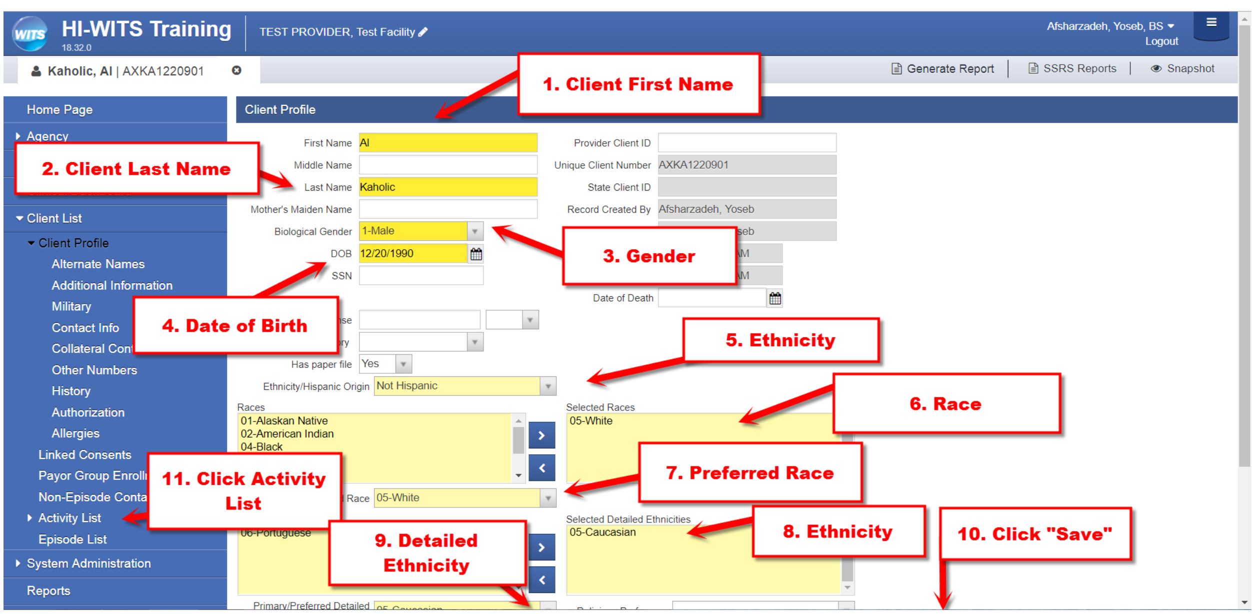
Situation: When someone gets accepted for the LEAD Program, Users will add the Client to the System and create Encounters

Note: Use Referral Process Below Only if Referring to Treatment

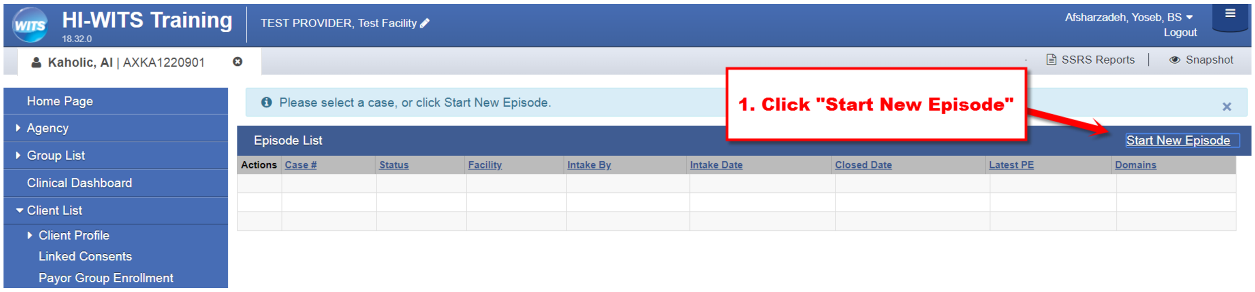
1. Check Client List to Determine Client is not a Duplicate.



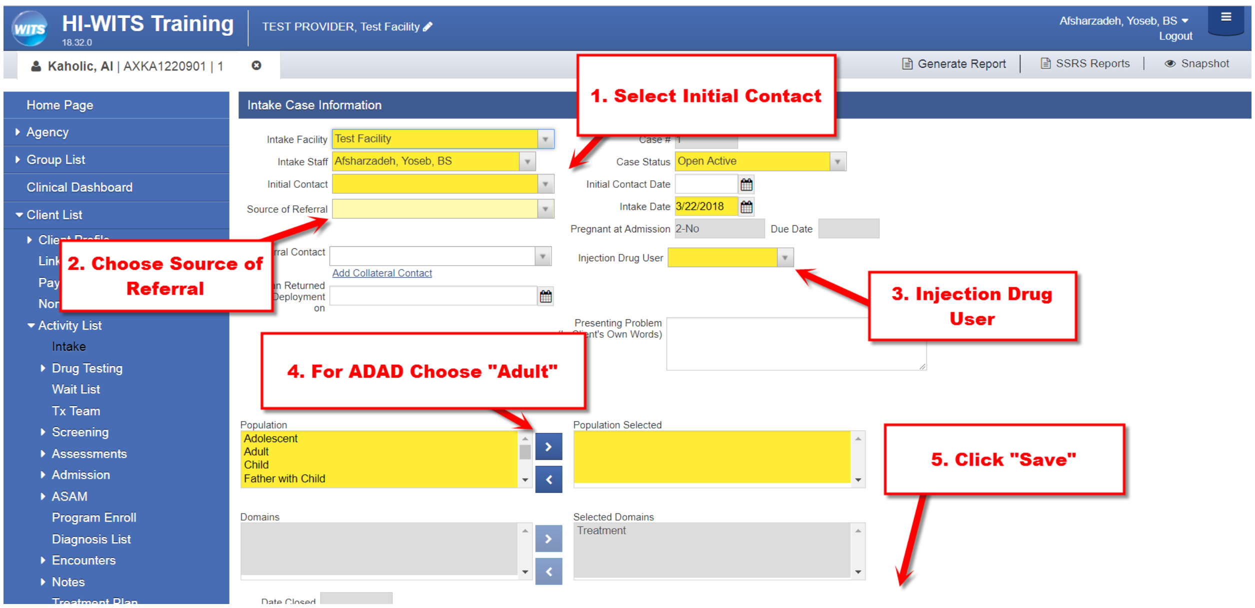
2. Fill in ALL Yellow Fields on Client Profile Screen, Save then Click Activity List



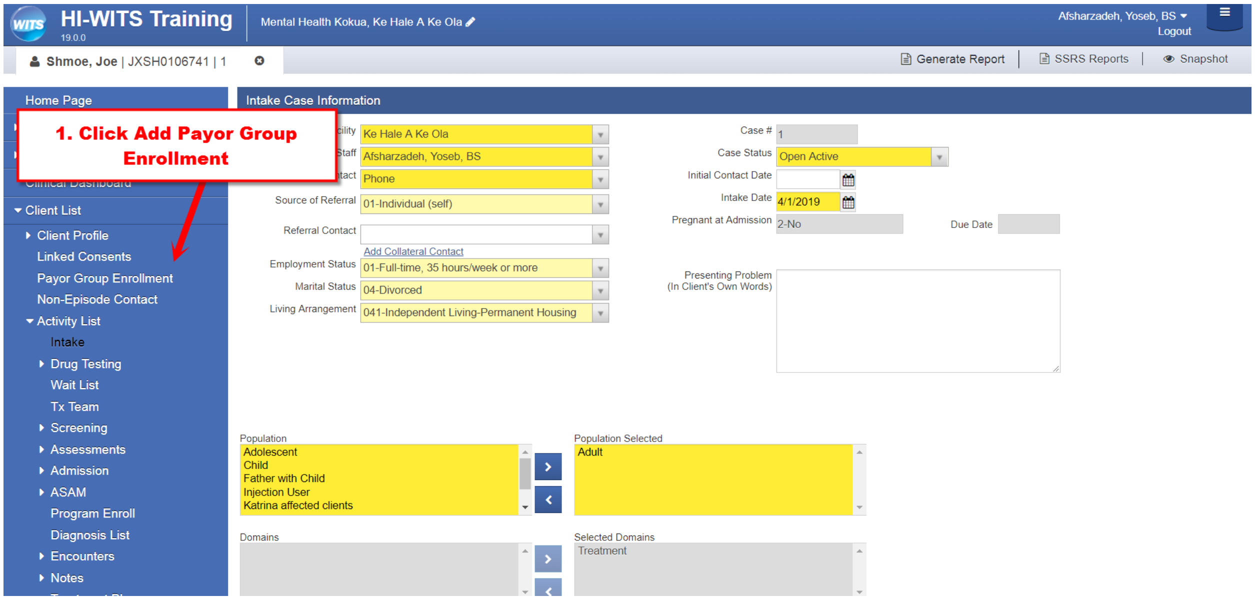
3. Click Start New Episode to Proceed to Intake Screen



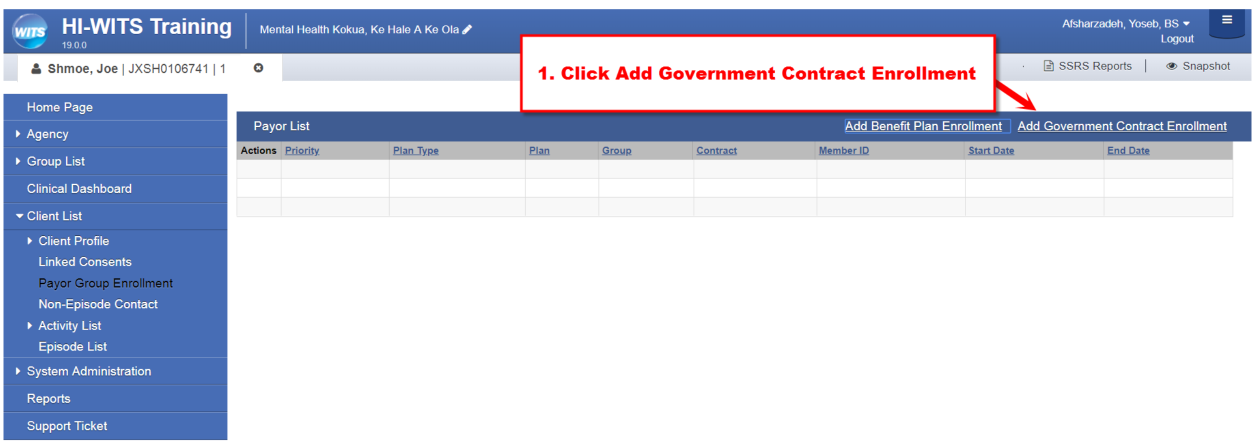
4. Fill in ALL Yellow Fields on Intake Screen



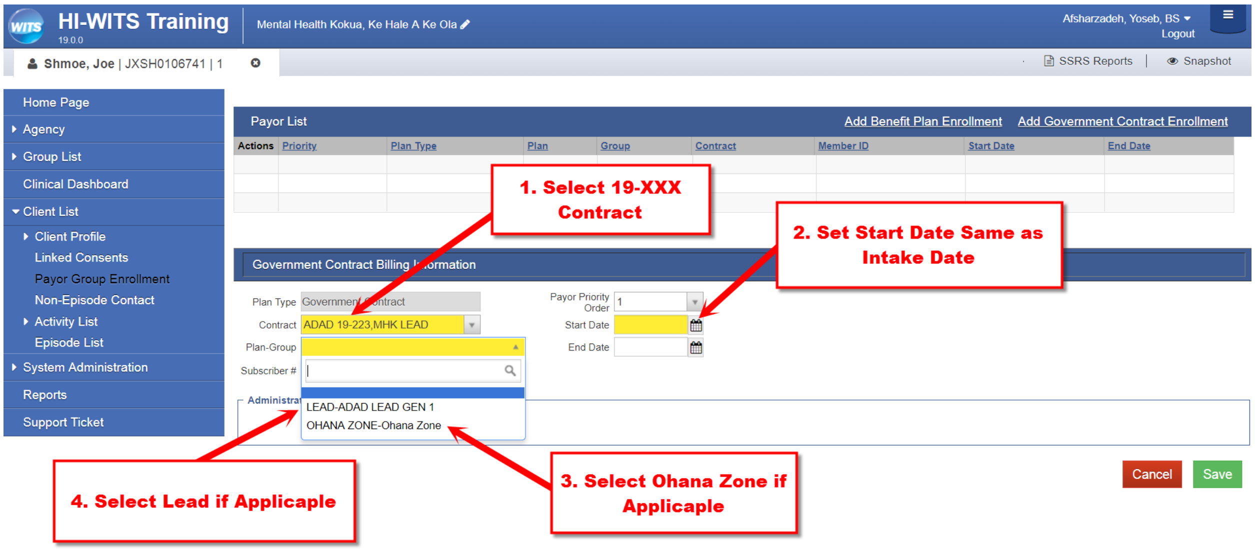
5. Click Add Payor Group Enrollment



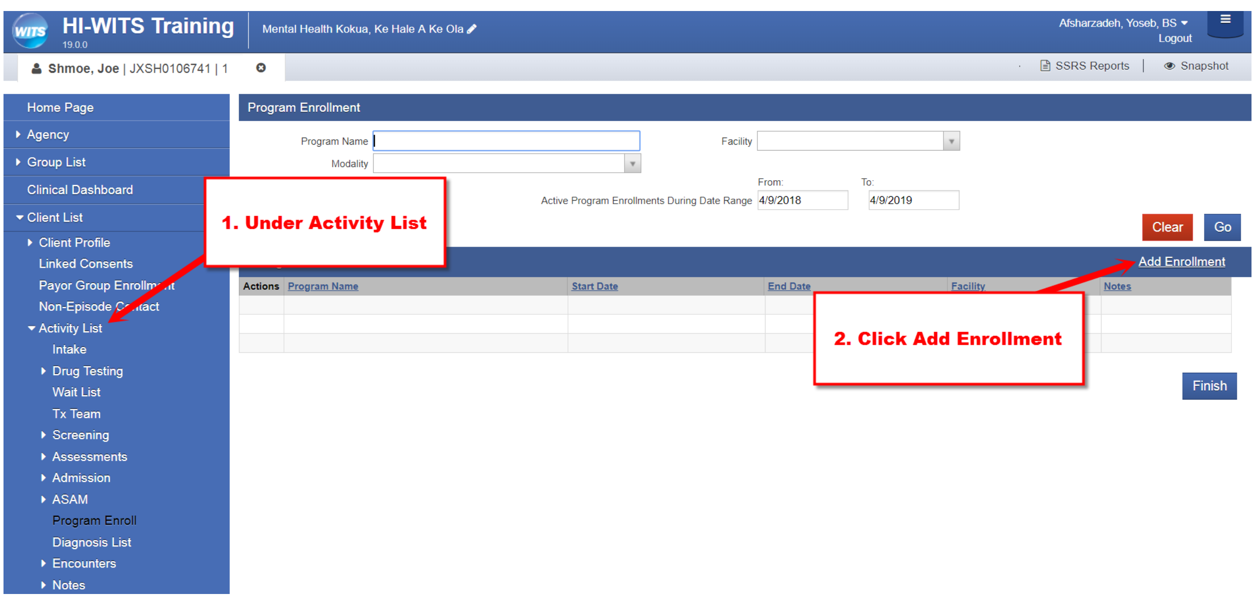
6. Click Add Government Enrollment



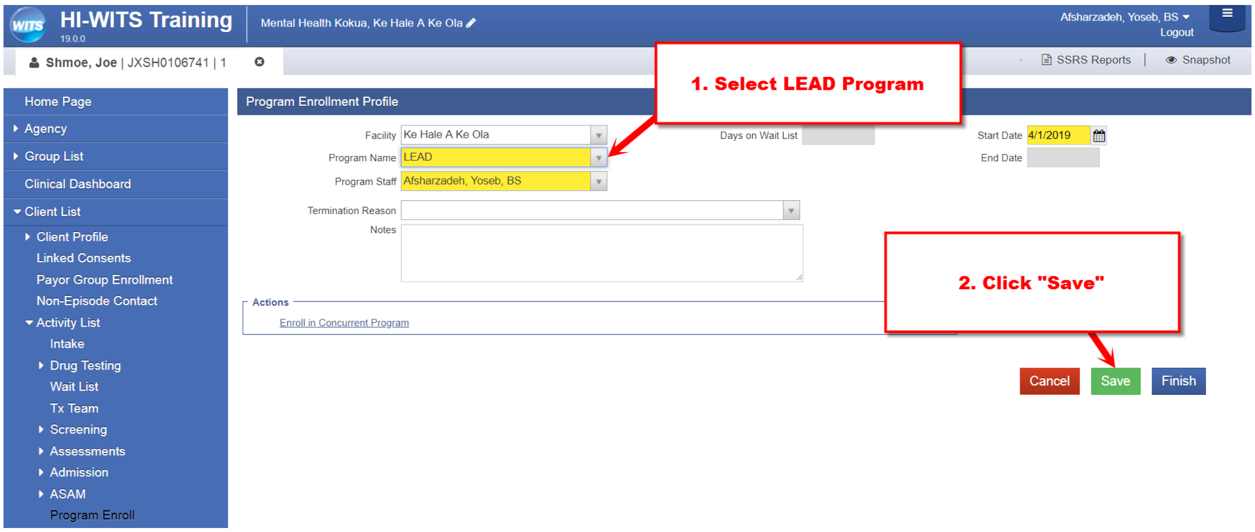
7. Select ADAD 19-XXX Contract. Set Start Date Same as Intake Date. Select Appropriate Funding Source. If Client Requires Both Funding Sources Add Them Separately.



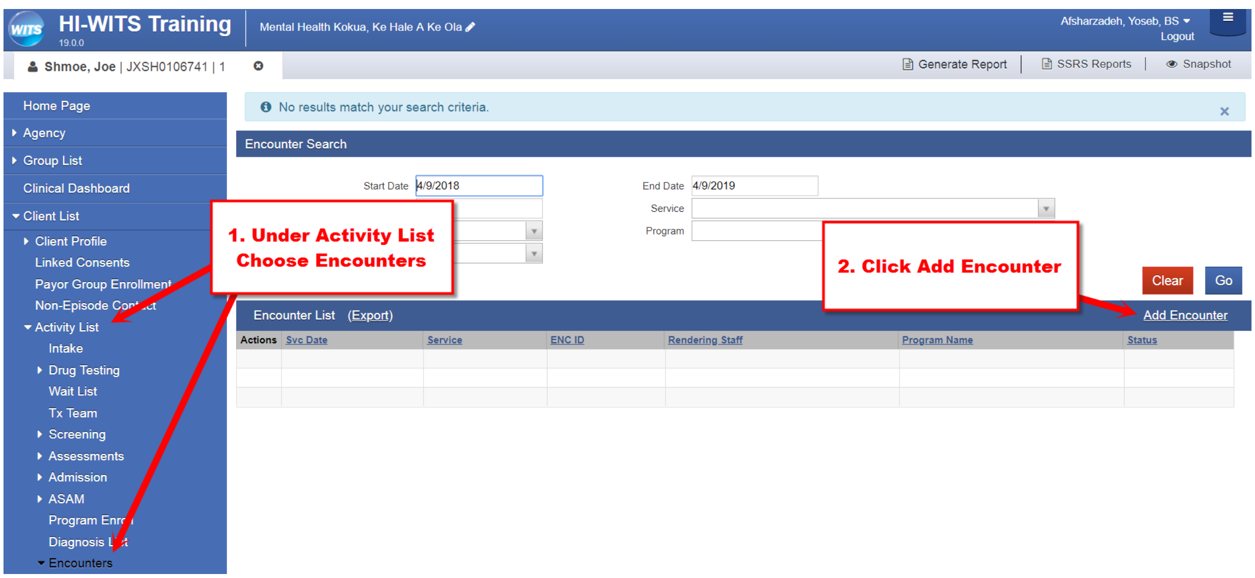
8. Under Activity List, Click Add Enrollment.



9. Select LEAD program and Click Save

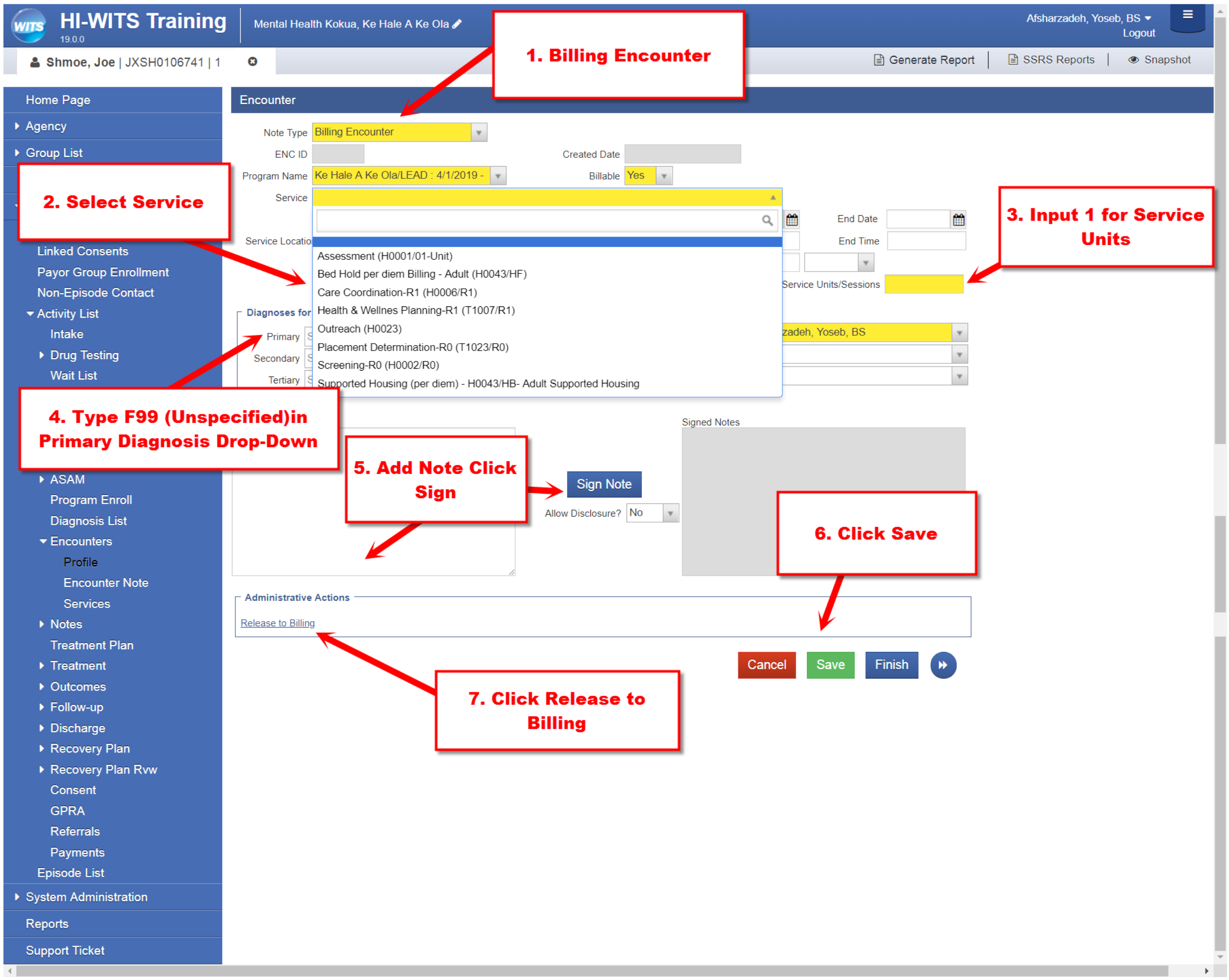


10. Under Activity List, Choose Encounters. Click Add Encounter to Add Encounter



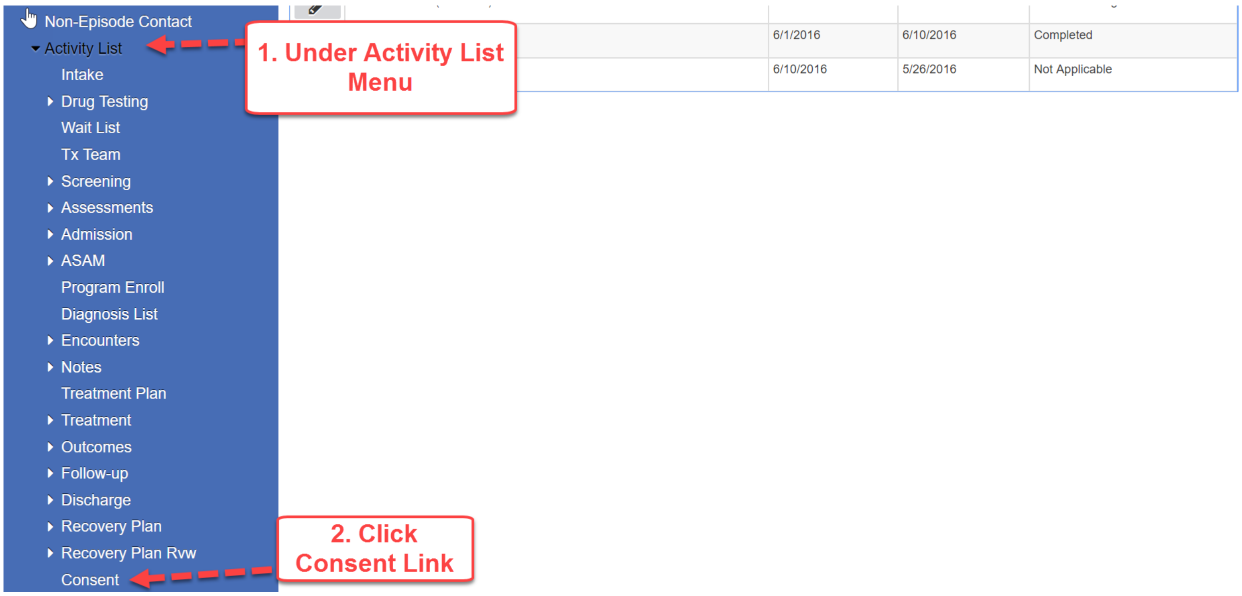
11.

12. Complete Encounter. Use F99 for Diagnosis if one Doesn't Exist

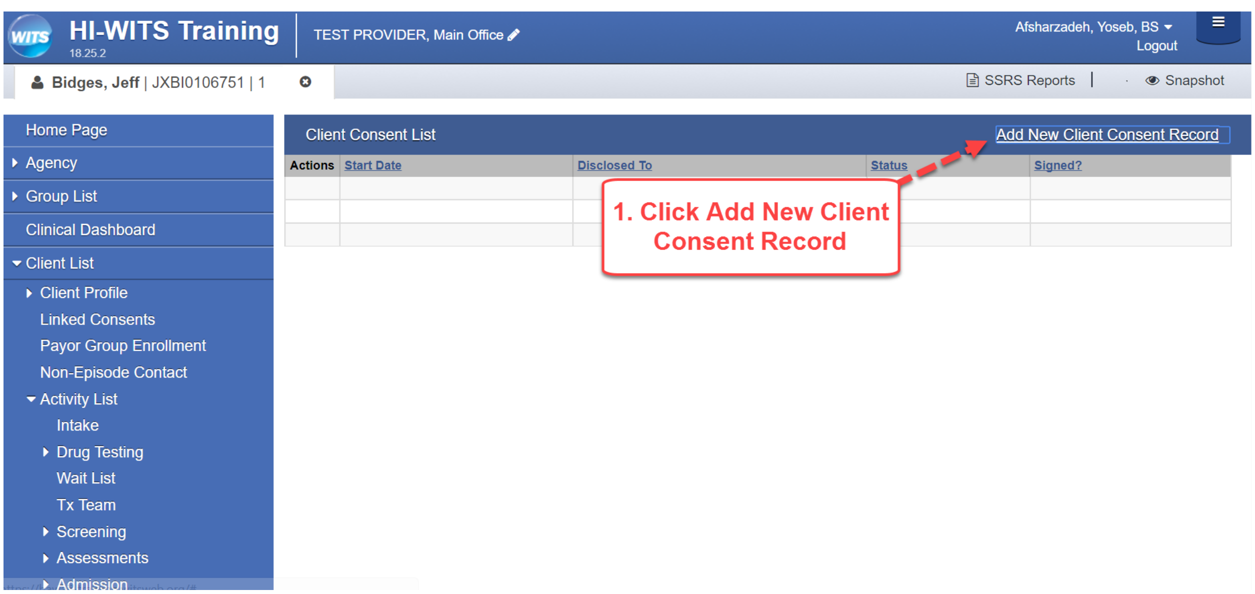


Note: See Below Step #20 for Adding DENS-ASI. If Client Needs Referral and Consent go to Step #13 and Continue.

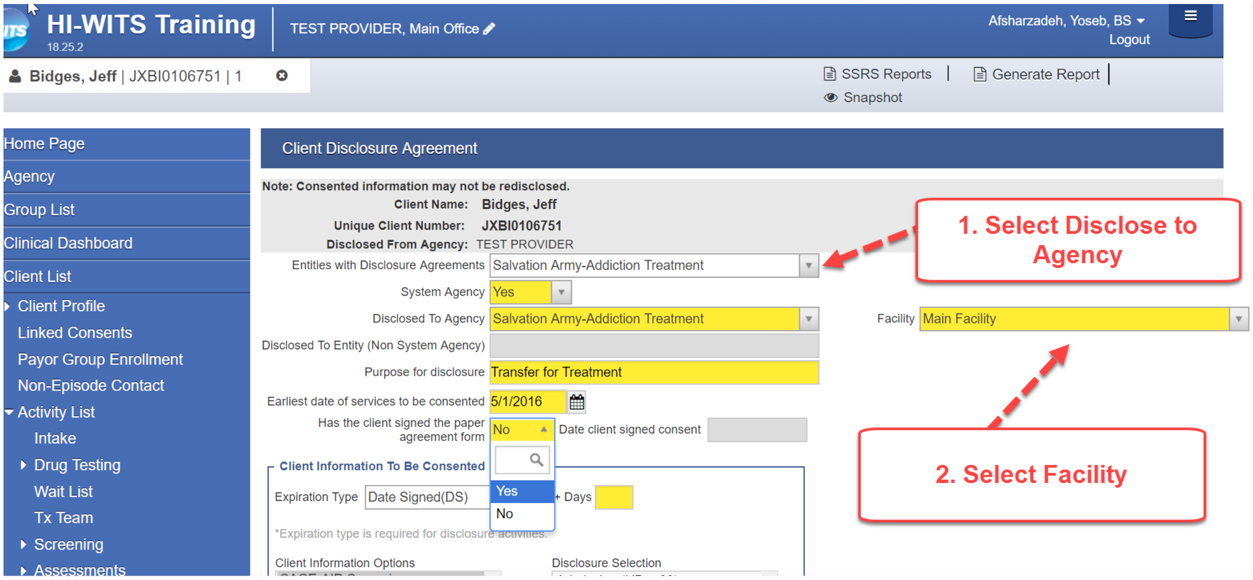
13.Under Activity List select Consent from the Left Menu Pick.



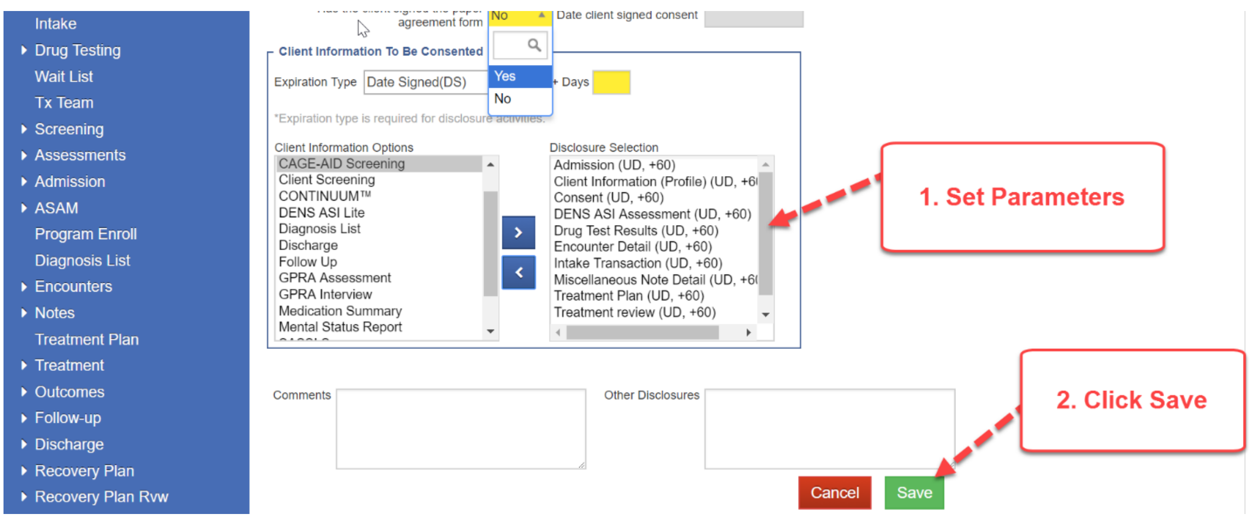
14. Click Add New Consent Record



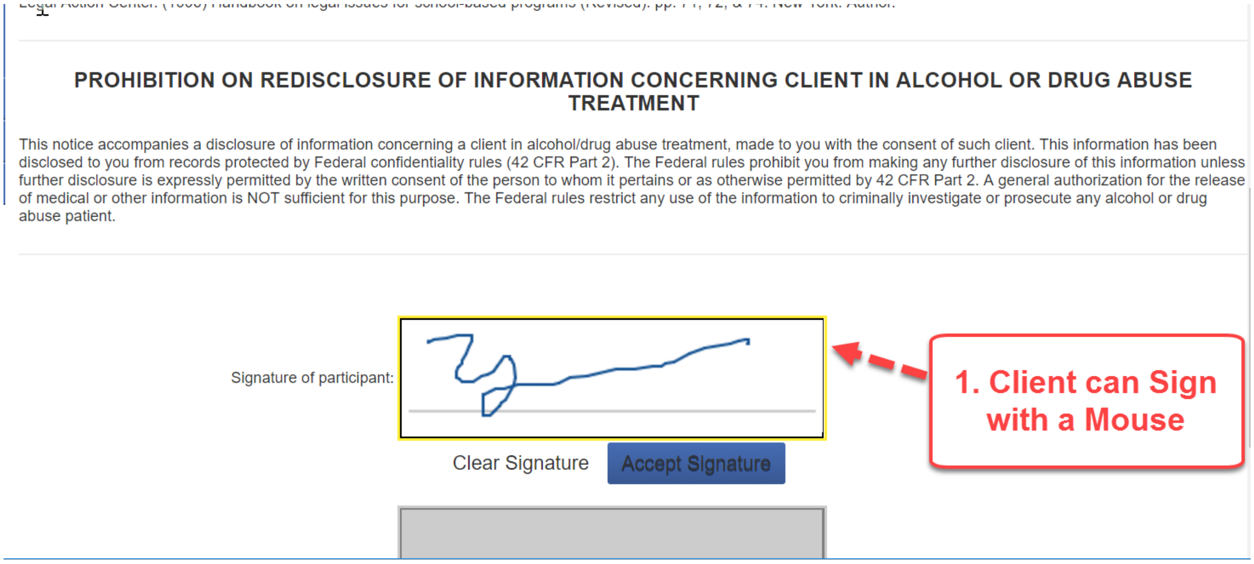
15. Select Disclose to Agency, Select FacilityC



16. Set Parameters for Information to be Consented, Click Save (Profile, Consent and ASI)

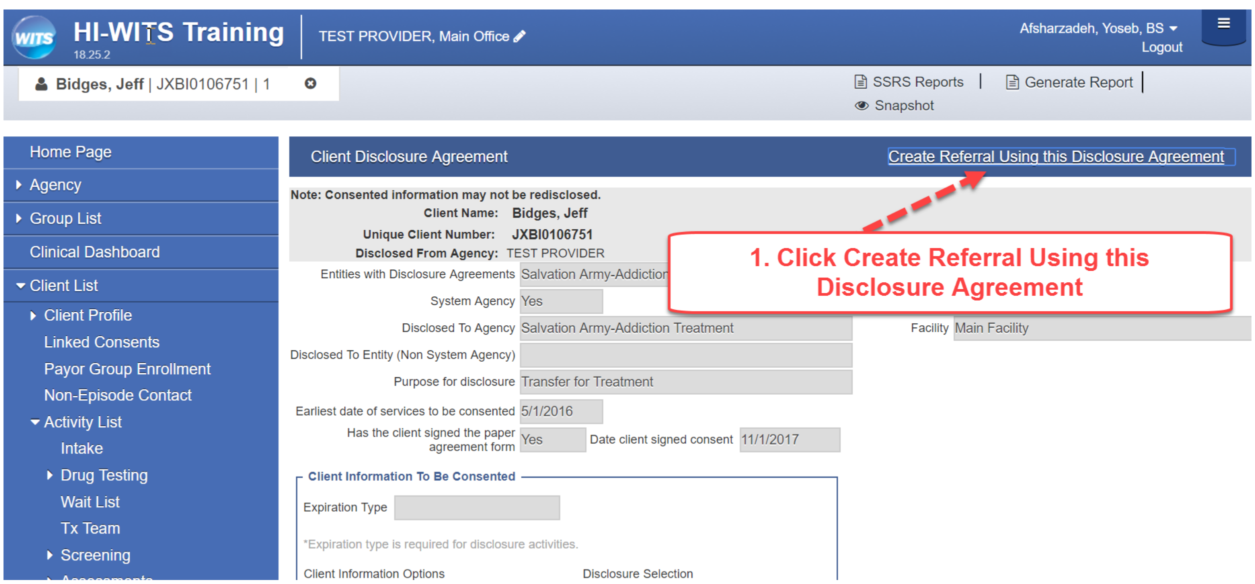


17. Have Client Sign the Consent click Save, a Mouse can be Used to Sign

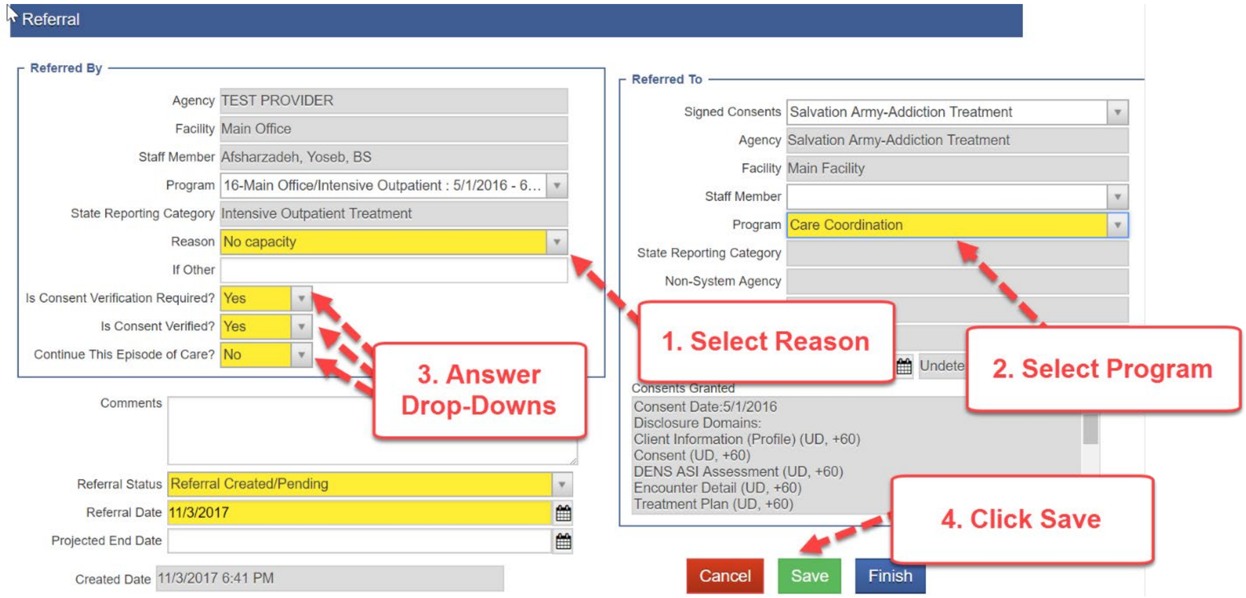


Note: Use Referral Instructions if Referring to Treatment

18. Click Create Referral Using this Disclosure Agreement Link

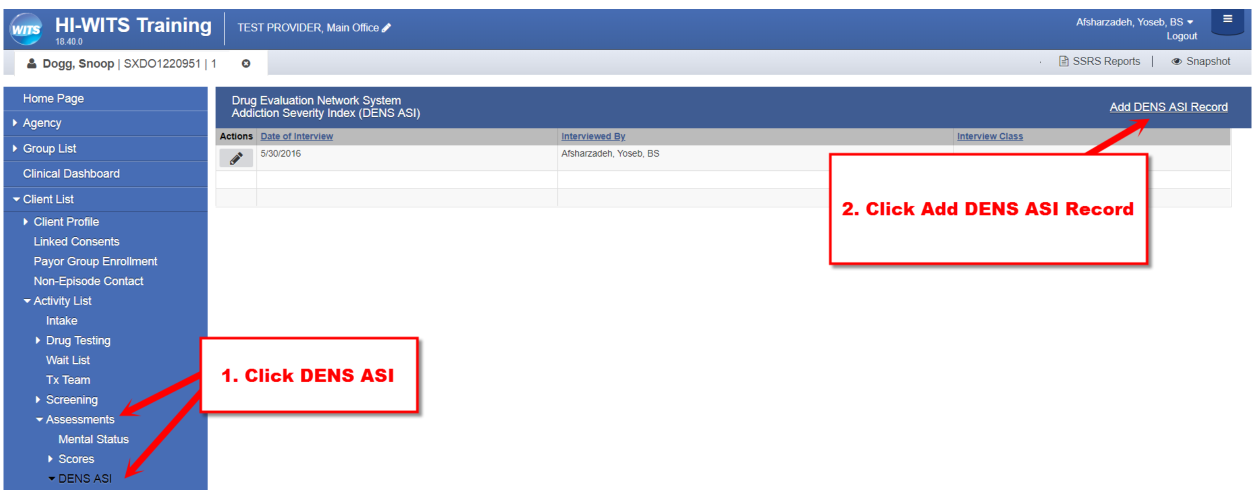


19. Set Referral Parameters

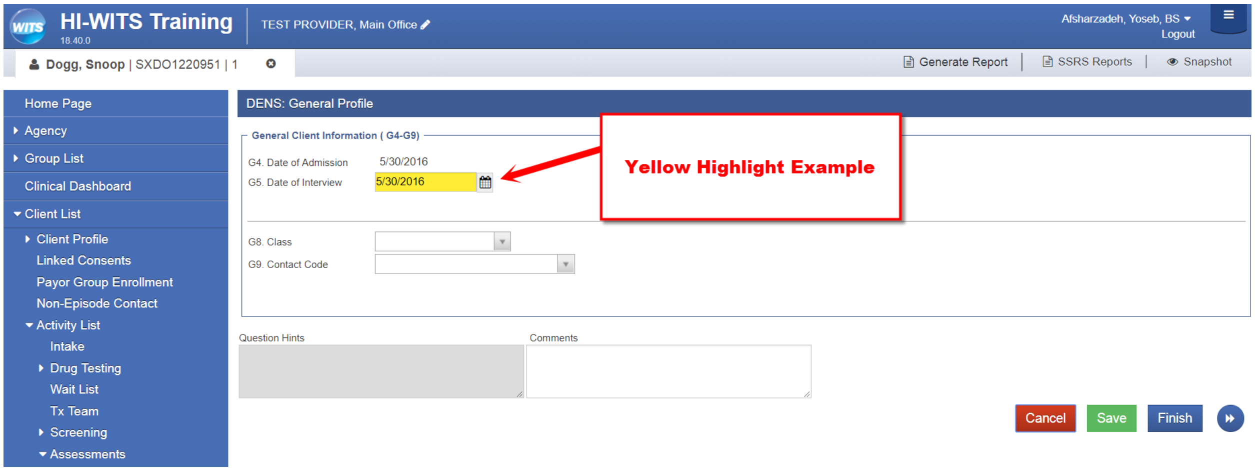


Note: Add Drug Evaluation Network System Addiction Severity Index (DENS ASI)

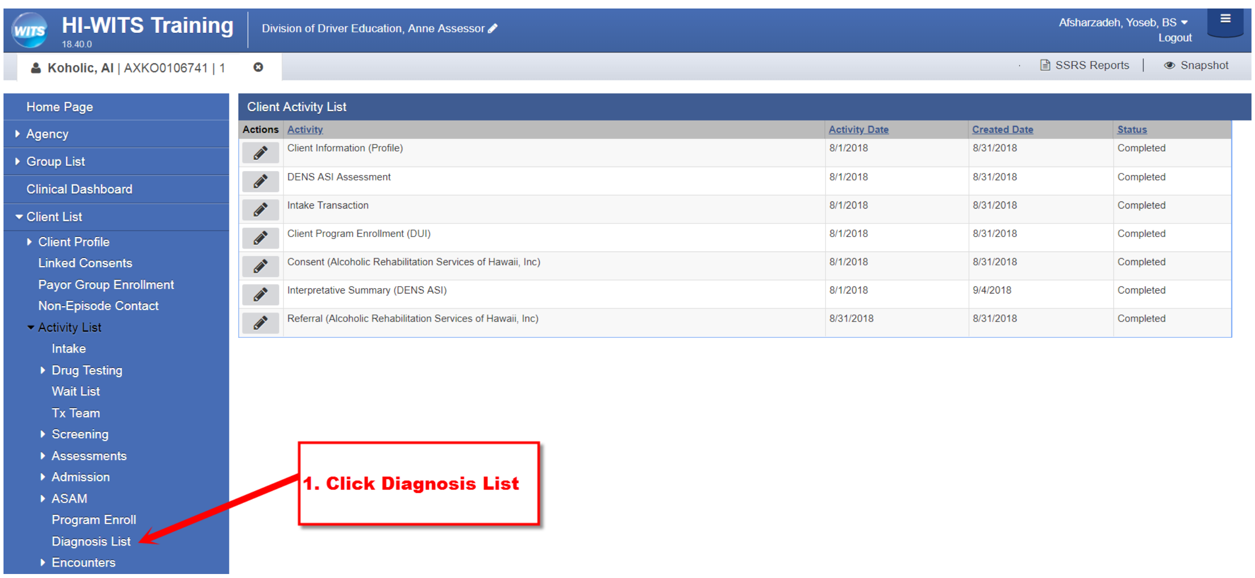
20. Under Assessments Select DENS ASI, then Click Add DENS ASI Record Link



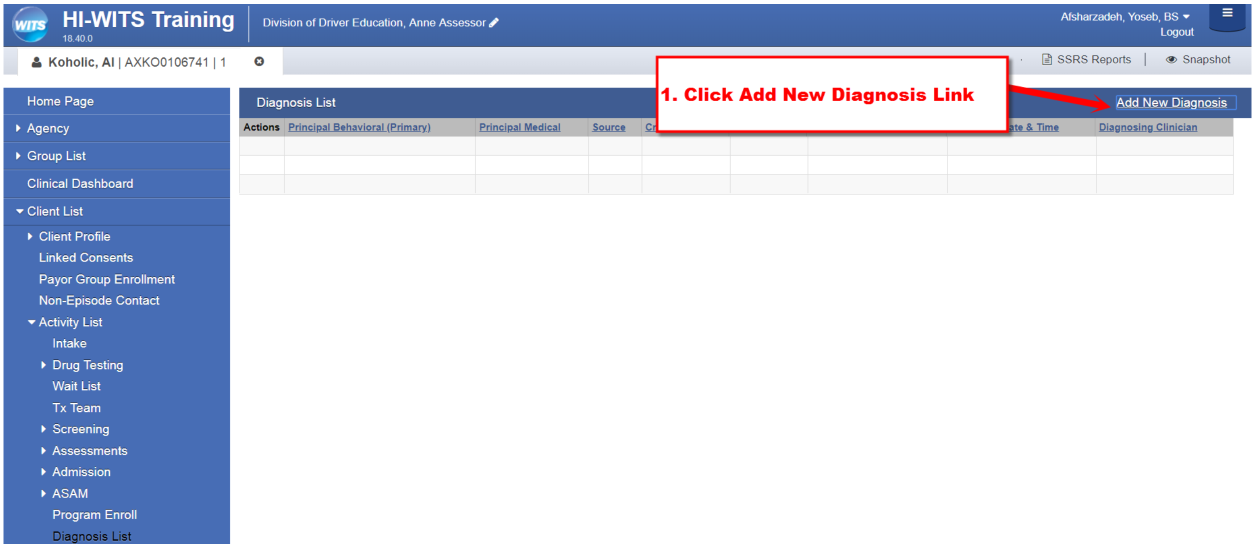
21. Complete ALL Yellow Highlighted Fields for ALL DENS ASI (+- 36 pages)



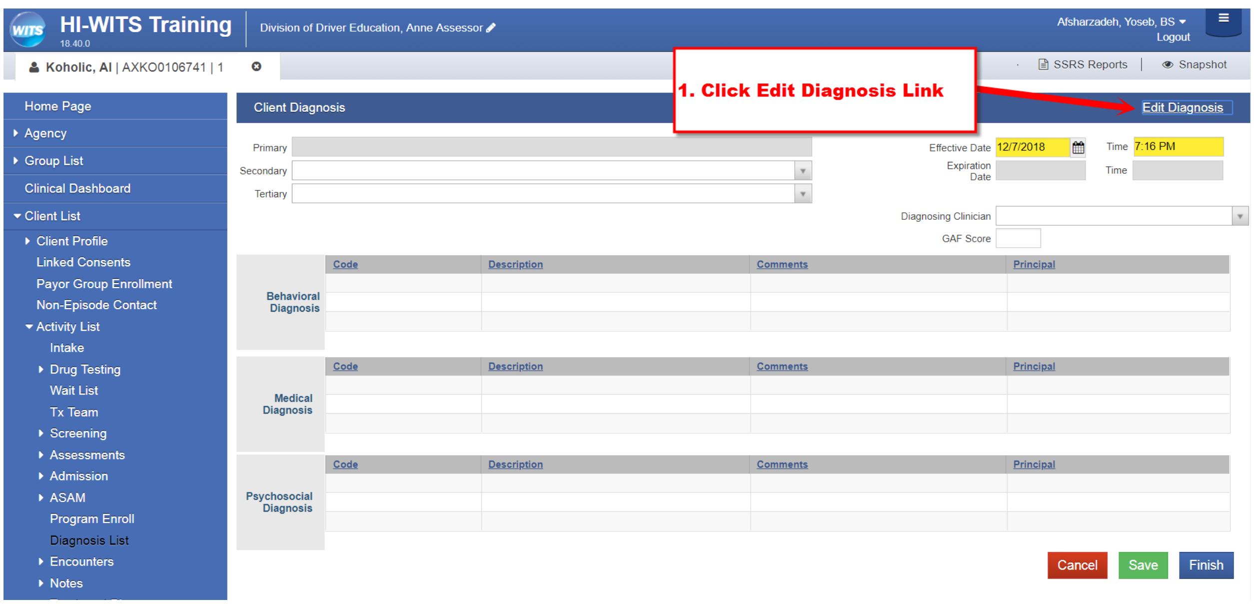
22. Click Diagnosis List Under Activity List on the Left Menu Pick.



23. Click the Add New Diagnosis Link



24. Click the Edit Diagnosis Link



25. Set Type to Behavioral, Either Type or Search Specific ICD-10 Diagnosis then set Principal Diagnosis to “Yes” Click “Save” Click “Finish” once done