

Sequence for Creating an Encounter

Task	Treatment	Access to Recovery (ATR)
1. Create Client Profile	Client List a. Check to see if client exists b. If not, Add Client	Assessor Client List a. Check to see if client exists b. If not, Add Client Provider Automatically created when referral accepted
2. Create Client Intake	Client List/Episode a. Search and select Client b. Click on Activity List link c. Click on Start New Episode link d. If an Agency has an ATR Contract, select 'Not ATR' for question "What is this intake?"	Assessor Client List a. Search and select Client b. Click on Activity List link c. Click on Start New Episode link d. Select 'ATR3' for question "What is this intake?" Provider Automatically created when referral accepted
3. Assign Payor Group Enrollment	Client List/Payor Group Enrollment a. Add Benefit Plan Enrollment b. Add Government Contract Enrollment	Assessor Automatically created at Client Intake Provider Automatically created when referral accepted
4. Create Screening	Optional	Assessor Client List/Activity List/Screening a. CAGE-AID Provider N/A
5. Create Intake GPRA	N/A	Assessor Client List/Activity List/GPRA 1. Add GPRA Intake Provider N/A
6. Create an Admission	Client List/Activity List/Admission	N/A

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7. Create Program Enrollment	Client List//Activity List/Program Enrollment NOTE: Some program enrollments may be created before an Admission is created.	<p style="text-align: center;">Assessor Automatically created at Intake</p> <p style="text-align: center;">Provider Automatically created when referral accepted</p>
8. Create Authorization (Voucher)	N/A	<p style="text-align: center;">Assessor Client List/Client Profile/Authorization</p> <p style="text-align: center;">Provider Client List/Client Profile/Authorization</p>
9. Create Encounter	Client List/Activity List/Encounter a. Release to Billing (Billable) b. Finalize Encounter (Non Billable)	<p style="text-align: center;">Assessor Client List/Activity List/Encounter a. Release to Billing</p> <p style="text-align: center;">Provider Client List/Activity List/Encounter a. Release to Billing</p>