

## ACCESS – Appointment Line Agents

### 1. Gather information from caller (Hospital Discharge Planner or Field Team\*)

Is the client existing?

- i. Conduct a client search in “**All Active Consumers**”
- ii. “**Identification tab**”, update and review all client information with the caller
- iii. “**Treatment History Tab**”, The client is considered existing if provided services in the past 3 months.
- iv. “**Program Status**” Identifies if the client is enrolled in FSP, Wraparound or has DCFS involvement.
- v. “**Case History Tab**” Shows called to ACCESS and if they have another recent appointment
  - a. “+ New Case” to start a referral

New Client to the system

- i. “+ New” on the task bar to begin a new call

#### a. On the Summary tab

- i. Complete the caller information
- ii. Case Summary, select “**Appointment Scheduling**” and add the call reason, Ex: Discharge
- iii. Consumer Information: Existing clients should prefill from your search or create a profile for the new client

#### b. Referral Tab

- i. Complete the Mental Health Information section, **Discharge date** starts the 5-business day clock for scheduling an appointment
- ii. Complete the Requester/Referring Party information, “Inpatient” for hospital discharge calls, and Mental Health

#### c. Insurance Status: If Medi-Cal, the caller will provide the Medi-Cal CIN #

- i. If they do not know client’s insurance information, request for information needed to run the Medi-Cal eligibility check on the state website (SSN and DOB, if Medi-Cal CIN# is not provided)
- ii. Reminders:
  - 1) Clients who are indigent can be referred to either DO or LE providers
  - 2) Clients who have Medicare only should be referred to DO providers only

### 2. PMRT CALLS

- a. There is no set timeframe for field teams to refer a consumer for an appointment.
  - i. PMRT/FIT is instructed to utilize the program whenever the client is not hospitalized. ACCESS agents should book all appointment requests from PMRT or field teams regardless of the timeframe.

### 3. Determine if the client is already connected to a Provider or is in FSP

#### a. Agent Assist

- i. In the tab for **Treatment History** on the client profile and if there are services in the last **three (3) months**, then assume they are connected to that provider.
- ii. \*\*If client is already connected, you can check the Appointments and Screeners tab to determine if there is an upcoming appointment scheduled.
  - 1) If no appointment is scheduled continue to create an appointment at that provider. (Unless the client’s preference is to go to another clinic)
  - 2) If an appointment is already scheduled for an existing client,
    - a. ACCESS agents can provide that scheduled appointment date to PMRT/FIT or the hospital

- b. If the existing client requires an earlier appointment than, what is currently scheduled utilize the 1pm appointment process described below.
  - b. **If the client is already connected BUT that provider does not have any available slots for DO and LE Providers**
    - i. Provide hospital or field team with a 1pm appt at that provider for 5 business days from either date of discharge OR from date of Field Team request
    - ii. Send an SRTS 2.0
      - 1) The 'Contact Information for this Request' should always be completed
      - 2) Referral Category: General Outpatient
      - 3) Outpatient Type: ACCESS Appt
      - 4) Referring Party Role:
        - a. If hospital: select 'Inpatient Facility'
        - b. If Field Team, select 'Mental Health Provider'
          - i. 'Referring Facility/Site School' should indicate either which Field Team
      - 5) "Is this an urgent request?" No
      - 6) For hospital discharges, the "Release From" should have 'Inpatient' selected with the release date provided by the hospital discharge planner
      - 7) Enter in a disposition of 'Appointment given' with the appointment date/time
      - 8) Disposition Details: Existing client at your site / add this appt to your calendar
      - 9) Transfer SRTS record to the respective provider
        - a. If you receive a pop-up message stating provider is not accepting for GOCS/PEI, please click 'close' to bypass the message
    - iii. Resolve the case in Agent Assist with Scheduled Appointment and add the comment that a 1pm appt was provided for 5 business days for an existing client at the site.
- c. **FSP**
  - i. If client is enrolled in FSP or in Outreach & Engagement with an FSP Provider:
    - 1) In the client information check under the **Program Status** Tab in the section for "**Consumer Program Status**"
      - a. FSP Status indicator will show "**Yes**" for enrolled or "**No**" for not enrolled
    - 2) Provide the caller with contact info for both the FSP provider & Navigator
      - a. **Service Area 1:**
        - i. Child/TAY (0-26): Selma Redding, [Sredding@dmh.lacounty.gov](mailto:Sredding@dmh.lacounty.gov), (213) 494-8123
        - ii. TAY (16-20): Selma Redding, [Sredding@dmh.lacounty.gov](mailto:Sredding@dmh.lacounty.gov), (213) 494-8123
        - iii. Adult (21+): Angelia Coleman, [AColeman@dmh.lacounty.gov](mailto:AColeman@dmh.lacounty.gov), (213) 949-1986
      - b. **Service Area 2:**
        - i. Child/TAY (0-26): Fang (Colin) Xie, [FXie@dmh.lacounty.gov](mailto:FXie@dmh.lacounty.gov), (213) 840-7273
        - ii. Adult (21+): Darrell Scholte, [DScholte@dmh.lacounty.gov](mailto:DScholte@dmh.lacounty.gov), (213) 272-8848
        - iii. Older Adult (60+): Darwin Puno, [DPuno@dmh.lacounty.gov](mailto:DPuno@dmh.lacounty.gov), (213) 434-1375
      - c. **Service Area 3:**
        - i. Child (0-15): Vanessa Torres, [VTorres@dmh.lacounty.gov](mailto:VTorres@dmh.lacounty.gov), (626) 430-2948
        - ii. TAY (16-20): Socorro Ramos, [SRamos@dmh.lacounty.gov](mailto:SRamos@dmh.lacounty.gov), (626) 430-2949
        - iii. Adult (21+): Laura Jurado, [LJuarado@dmh.lacounty.gov](mailto:LJuarado@dmh.lacounty.gov), (213) 700-2450
      - d. **Service Area 4:**
        - i. Child (0-15): Luz Smith, [LSmith@dmh.lacounty.gov](mailto:LSmith@dmh.lacounty.gov), (213) 494-8123
        - ii. TAY (16-20): Aldys Ramos, [AmRamos@dmh.lacounty.gov](mailto:AmRamos@dmh.lacounty.gov), (213) 720-8002
        - iii. Adult (21+): Nancy Weiner, [NWeiner@dmh.lacounty.gov](mailto:NWeiner@dmh.lacounty.gov), (213) 349-7959
      - e. **Service Area 5:**
        - i. Child (0-15): Kellie Bilbrew, [kbilbrew@dmh.lacounty.gov](mailto:kbilbrew@dmh.lacounty.gov), (213) 349-7973

- ii. TAY (16-20): Kellie Bilbrew, [kbilbrew@dmh.lacounty.gov](mailto:kbilbrew@dmh.lacounty.gov) , (213) 266-3263
- iii. Adult (21+): Angela Coleman, [AColeman@dmh.lacounty.gov](mailto:AColeman@dmh.lacounty.gov), © (213) 949-1986

**f. Service Area 7:**

- i. Child (0-15): Cheryl Lopez, [Calopez@dmh.lacounty.gov](mailto:Calopez@dmh.lacounty.gov), (213) 798-2458
- ii. TAY (16-20): Cheryl Lopez, [Calopez@dmh.lacounty.gov](mailto:Calopez@dmh.lacounty.gov), (213) 798-2458
- iii. Adult (21+): Alicia Ibarra, [Albarra@dmh.lacounty.gov](mailto:Albarra@dmh.lacounty.gov), (323) 705-4376

3) Tell the Hospital or Field Team to contact the FSP provider to coordinate care; and if there are any difficulties contacting them, then contact the Navigator

- ii. If hospital or field team calls ACCESS back because they were told that clients are no longer enrolled in FSP, then treat this as a non-FSP client

**4. Search for an (LE) appointment in Agent Assist**

- a. The initial information from Section 1 of this form is completed you can now schedule the client.
  - i. On the top task bar locate and click on **“Appointment”**
  - ii. Provider Search Appointments will appear with a Provider Directory Search. The clients’ age and address will prefill the search. Click on Search next to the address.
  - iii. The providers listed will be organized by the Next Available Appointment
  - iv. Verify the distance to the provider and the Maximum Distance bar can be adjusted to locate more appointments within the time and distance standards.
  - v. Click on the **“Select”** in the field with the provider information
  - vi. Click on the **“Time”** of the appointment you wish to book for the client
- b. In the appointment verify the **“Consumer Age”** for the appointment matches the client you are booking. Once confirmed complete all the sections of the booking appointment.
- c. Provide the information for the appointment to the discharge planner on the call.
- d. Case Resolution, in Field Disposition select **“Scheduled Appointment”** and in Disposition Comments enter the appointment information. Click on Resolve to close the case.

**5. Schedule the client directly into the available BLOCK slot if no timely slots are available in Agent Assist**

- a. **IBHIS Scheduling Calendar (DO)**
  - i. Replace the BLOCK code (10013/10014) with the Intake Placeholder (99998) code and enter the client’s name
  - ii. Enter in Appointment Notes field:
    - 1) **“Hospital Discharge or Field Team appt by ACCESS”**
    - 2) If this is an existing client at this site – **“Existing client at your provider”**
    - 3) Add the client’s information to the appointment and save the appointment.
- b. **SRTS**
  - i. Complete SRTS with all the information provided by the caller.
  - ii. Add the appointment information as Appointment given and all the information for the appointment and provider.
- c. **Agent Assist**
  - i. Case Resolution, in Field Disposition select **“Scheduled Appointment”** and in Disposition Comments enter the appointment information. Click on Resolve to close the case.