



Book an Appointment

Create a New Case

1. First, navigate to your Home View.
2. Next, create a new case. In the command bar, click + **New Case**.
3. On the new case record, fill in the fields under **Case Summary**:
 - Call Reason: Appointment Scheduling
 - Reason for Call
4. Fill in the field under **Consumer Information**:
 - Consumer
5. Confirm the Consumer's information and check their opt in/out fields.
6. On the **Referral tab**, you must also enter the Contact Information For This Request for *all* requests.
7. Under Contact Information for this Request, fill in the following fields:
 - Contact Name
 - Contact Phone Number
 - Contact Preferred Language
 - Relationship to Client

8. Under Mental Health Information, fill in the following fields:
 - Is this an urgent request?
 - Can you tell me the reason you are seeking mental health services today?
 - Are you currently receiving mental health services?
 - Release From
 - Psychotropic Medications within the last 30 days?

Note: Depending on your selections, you may be required to fill in additional fields
9. Then fill in the Requester/Referring Party
10. Then, click **Save**.
11. As a reminder, for third party referrals, a DHCS Screener is not going to be required.



Note: When an appointment is selected, an SRTS referral is automatically created. Each case is allowed only one referral OR one appointment. There would never be an instance where a case requires BOTH an appointment and a referral.



For additional resources, visit the Adaptive Learning Platform.



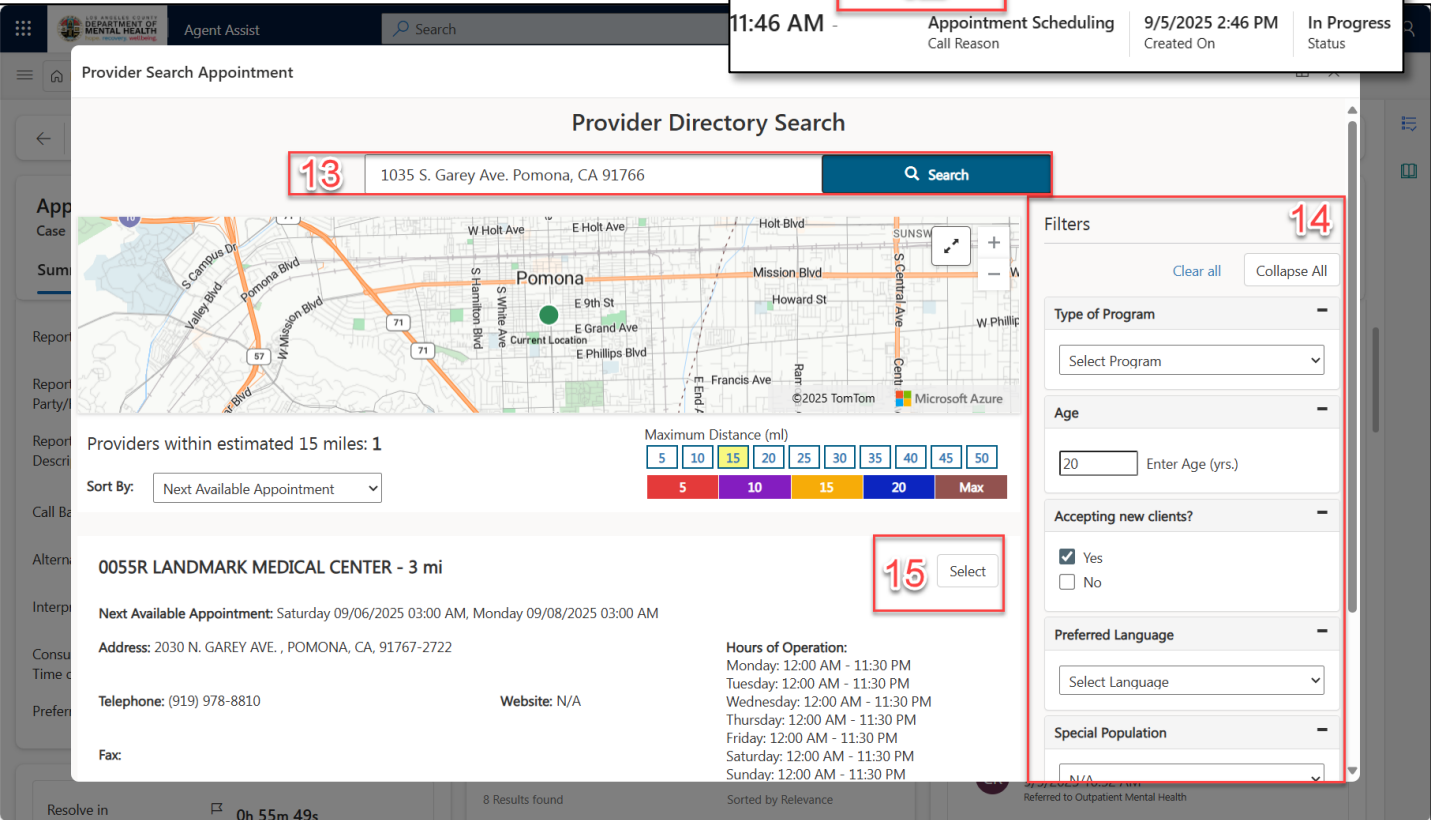
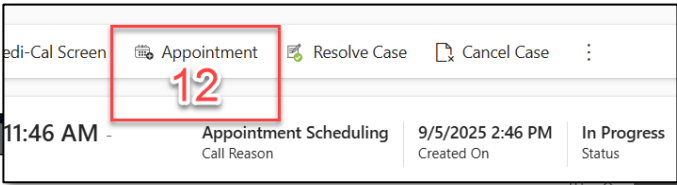
Book the Appointment for the Consumer

12. Next, you will book an appointment for this consumer. In the command bar click **Appointment**.
13. Now, the Provider Directory Search appears. The address from the consumer record will auto-populate in the search bar. If you need to update this, you can do so here. Note: Make sure that the consumer record is also updated.
14. Use the Filter Criteria to help narrow your results and apply any filters if needed. Click **Search**. If this does not yield any results, you may need to expand your Distance filter.
15. Click the **Select** button to select the desired provider.
16. On the Available Appointments pane, select the first **Date** and **Time** that appears. You will want to offer the soonest available appointment.
17. It will lead you to another screen to confirm the information of this booking. Add the required information: Consumer Age, Method of Delivery, Type of Requests, Was an earlier appointment offered?
18. Click **Confirm**.

19. In the **New Appointment** pop up, in the record header, check that the Status Reason shows as **Booked**. You can also scroll down to see the location details, including phone number. Then, click **Save & Close** and resolve the case.
20. (Optional) If you want to confirm the appointment was booked, navigate back to the Consumer record.
21. On the Consumer record, click the **Appointment and Screeners** tab.
22. Under the Appointments subgrid at the bottom, the most recent appointments booked for this consumer will display. Review the new appointment details. You may double click into the row to view the details.
23. Click **Save & Close**
24. Then, **Resolve Case** from the command bar.

Note: Notice that the "Sort By" drop down is filtered to "Next Available Appointment." Results may vary depending on the day and time. It will default to today's date (on top) and show appointments up to 14 days out. Make sure to select the provider with the soonest available appointment.

Note: If there are two appointments with the same exact date and time, the system will display the provider that has the shortest distance first. There may be times when the caller is looking for a provider based on distance. You can change the Sort by filter to also sort by Distance.





Cancel an Appointment

1. To cancel the appointment, direct the caller to contact the Provider for any changes required.
2. You would document this as a “General information” call in these instances.

The screenshot displays the Microsoft Dynamics 365 Agent Assist interface for a case titled "General Information 9/27/2025 12:05 PM". The interface is divided into three main sections: CALLER INFORMATION, CASE SUMMARY, and CONSUMER INFORMATION.

- CALLER INFORMATION:** Reporting Party First Name: Stanley; Reporting Party Last Name: Cup; Reporting Party/Relationship/Agency: Father; Reporting Party Relationship Description: ---; Call Back Number: (999) 999-9999; Alternate Number: ---; Interpreter Services: No; Interpreter Language Needed: English.
- CASE SUMMARY:** Origin: Phone; Case Number: CAS-55922-L3R9J6; Call Reason: General Information (highlighted with a red box); Is this an emergency or crisis situation?: No; Reason for Call: Charter Oak Hospital Discharge Planner and/or Consumer is calling to cancel their appointment scheduled for x date and x time with x provider.
- CONSUMER INFORMATION:** Consumer: Sunn_Bay; Mobile Phone: ---; Gender: M; Date of Birth: ---; Client ID: ---; Medi-Cal #: ---; Insurance Status: ---; Managed Care Plan: ---; Case History: Call Reason, Created On, Final [---]