LOS ANGELES COUNTY
DEPARTMENT OF MENTAL HEALTH
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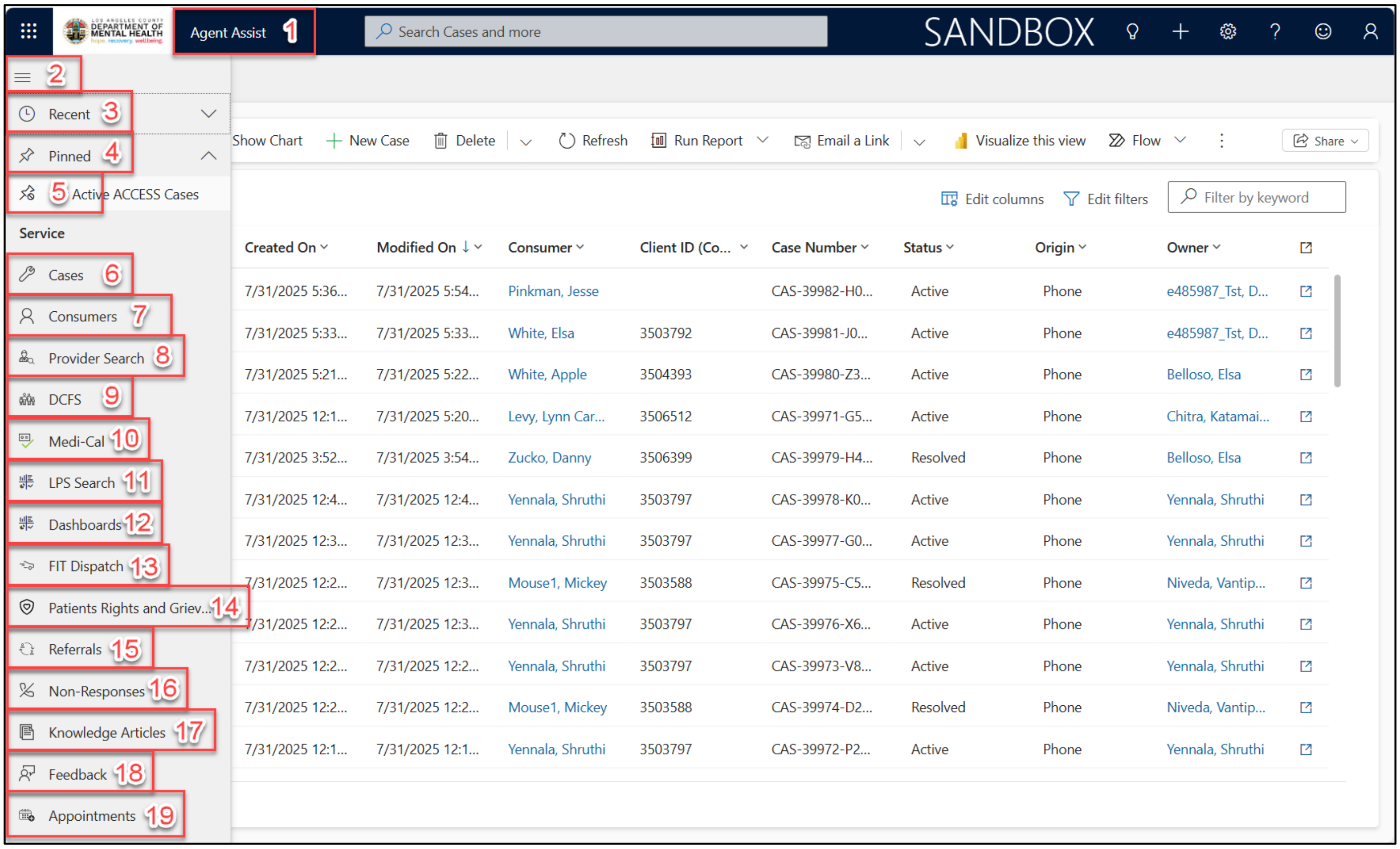
Microsoft D365: Agent Assist

Quick Reference Guide: Basic Navigation



Navigate the Site Map

1. Open the **Agent Assist** app. The system opens with the "**My Active ACCESS Cases**" table view.
2. Expand the **Site Map** to navigate across tables such as Cases, Consumers, Dashboards, and more.

Recent and Pinned Records and Tables

3. Expand **Recent** to view recent records.
4. Expand **Pinned** to view pinned records and tables.
5. Click the **Pin icon** in the Recent list to pin or unpin records and tables.

Service Section

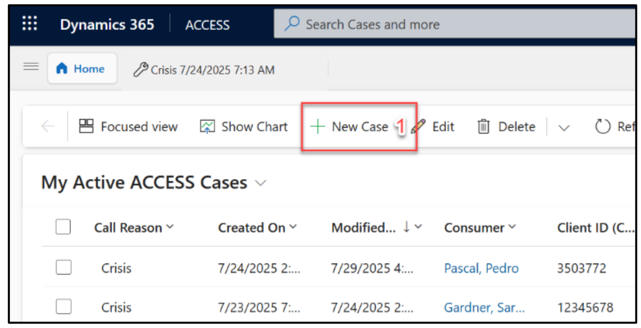
6. Click **Cases** to quickly access the table of Case records.
7. Click **Consumers** will provide access to all consumer records. By system default, the "All Active Consumers" table view appears.
8. Click **Provider Search** to search by an address or provider name/number and search across outpatient or inpatient providers.
9. Click **DCFS** which will open in a new browser to log into the DCFS Referral Portal.
10. Click **Medi-Cal** which will open in a new browser where you can search for a Caller's Medi-Cal status.
11. Click **LPS Search** to view the LPS Search (Access Center).
12. Click **Dashboards** to quickly view analytics, insights, and data across various records such as Cases and Resources.
13. Click **FIT Dispatch** to navigate to the "Awaiting Dispatch" table. Switch the table view to see records for Completed, Dispatched, No Dispatch, and Team Assigned.
14. Click **Patient Rights and Grievances** to view Patient Rights and Grievances Submissions.
15. Click **Referrals** to view Referrals created by you.
16. Click **Non-Responses** to view All Non-Response records.
17. Click **Knowledge Articles** to navigate to the library of Knowledge Articles.
18. Click **Feedback** to access all feedback and comments on Knowledge Articles.
19. Click **Appointments** to navigate to all appointments ranging from Available, Booked, Canceled, DO, and LE appointments.

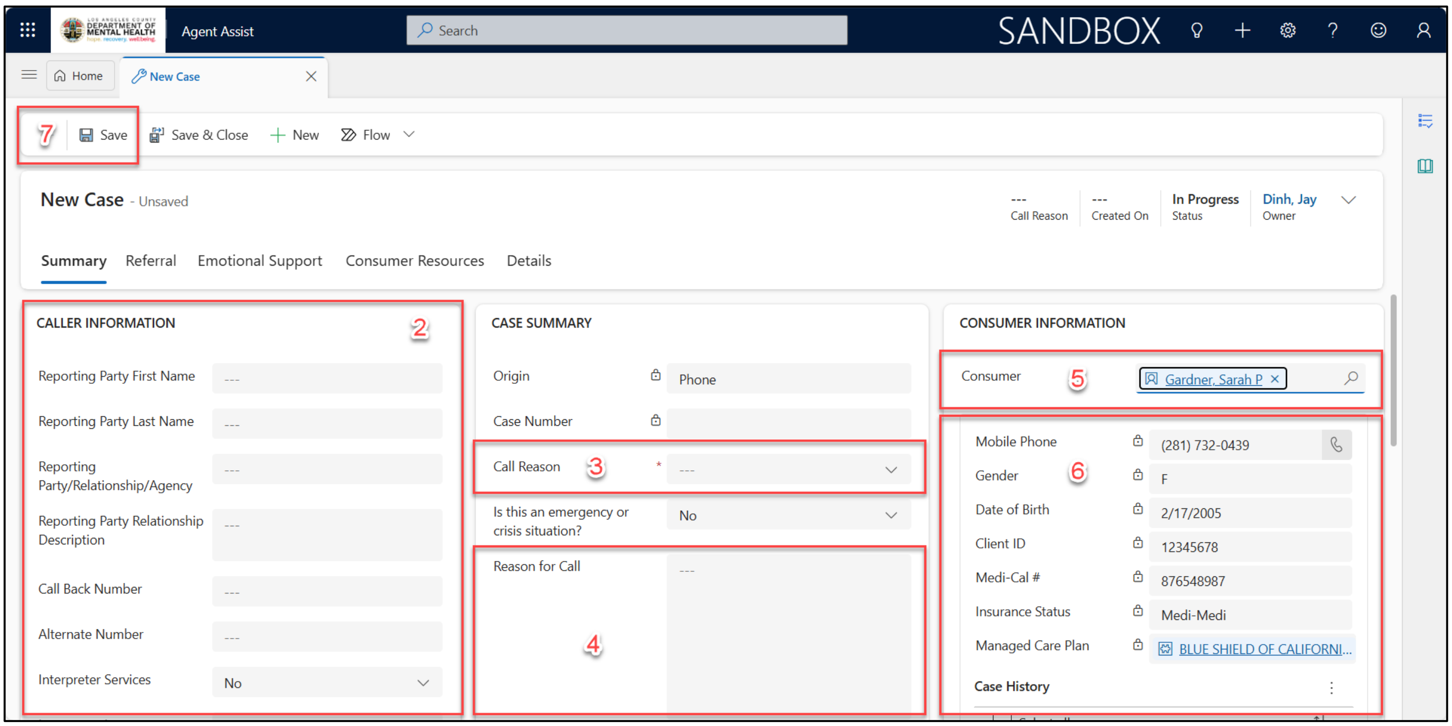
For additional resources, visit the Adaptive Learning Platform.

Create and Save a Case

Note: The following scenario will be a generic example of how to create a case. For specific training scenarios, please refer to a different quick reference guide with the respective training scenario.

1. From the **Home Page**, click **+New Case** in the Command bar.





2. Gather the **Caller Information**.
3. In the **Call Reason** field, input the desired call reason.

Note: If you select a different call reason, the form fields will have different mandatory fields.

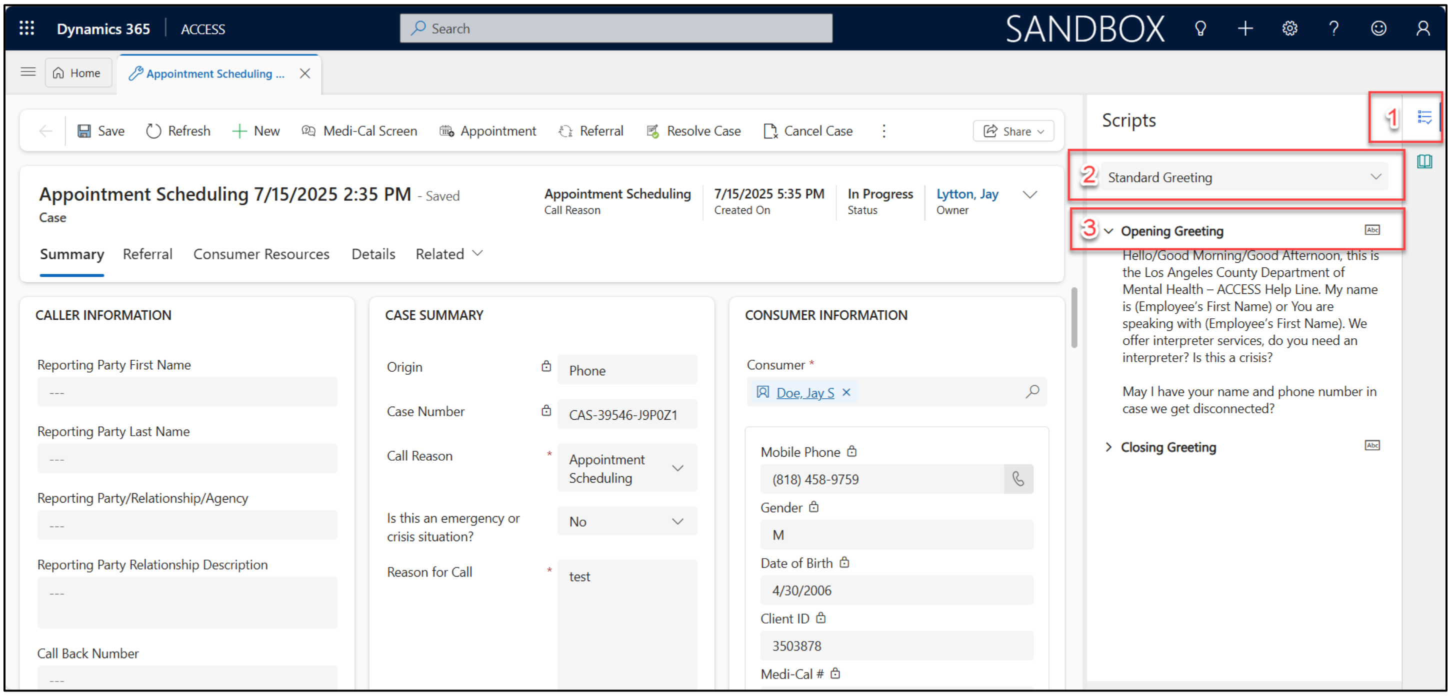
4. In the **Reason for Call** field, document the reason for call.
5. In the Consumer field, select **Look Up Field**

Note: If you need to search for an existing consumer, type their name in the Search field. If you need to create a new consumer, click + New from the Consumer lookup field and fill in the Quick Create form.

6. Once a Consumer is selected, check that the data has populated in the **Consumer Information** section.
7. In the Command bar, click **Save.**

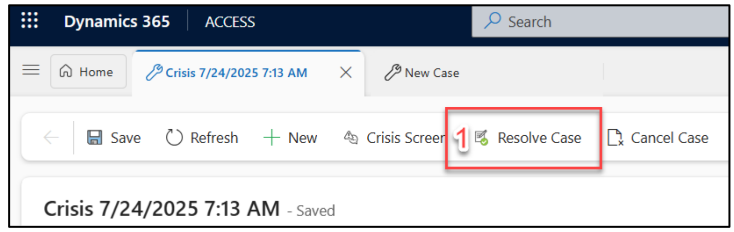
Utilize Agent Scripts within Cases

1. On the case record, to the right side of the screen, navigate to **Scripts icon**. A Scripts pane will appear to the right.
2. Use the **dropdown menu** to select the script category.
3. Click the **arrow** to the left of the script title to expand or collapse the script.

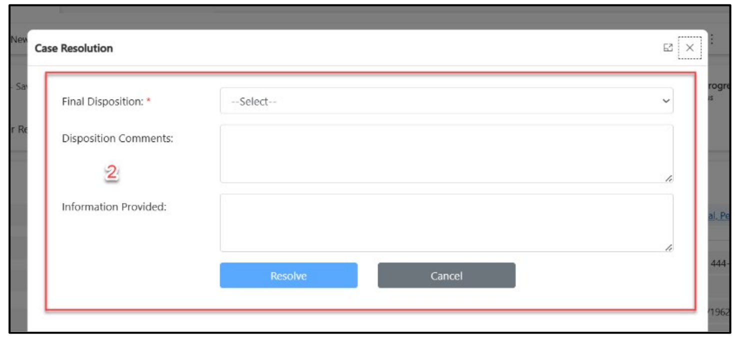


Resolve a Case

1. From a case record, in the Command bar, click **Resolve Case.**



2. A Case Resolution window appears. Enter the following information: Final Disposition, Disposition Comments, and Information Provided. Then, click **Resolve**.



> Note: Final Disposition Options are based on the case type.

3. After you resolve the case, the Case record will return to "**Read-Only**" and the status is "**Resolved**."
   You cannot edit any additional information. If you need to reactivate the case (put in back in Draft), please reach out to your (or an avaliable) supervisor.
4. To view the Case Closure details, navigate to the **Details tab**.
5. In the Case Closure section, review the details.