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

Quick Reference Guide: General Information, Emotional Support, Patients' Rights Calls

General Information, Emotional Support, and Patients' Rights Calls

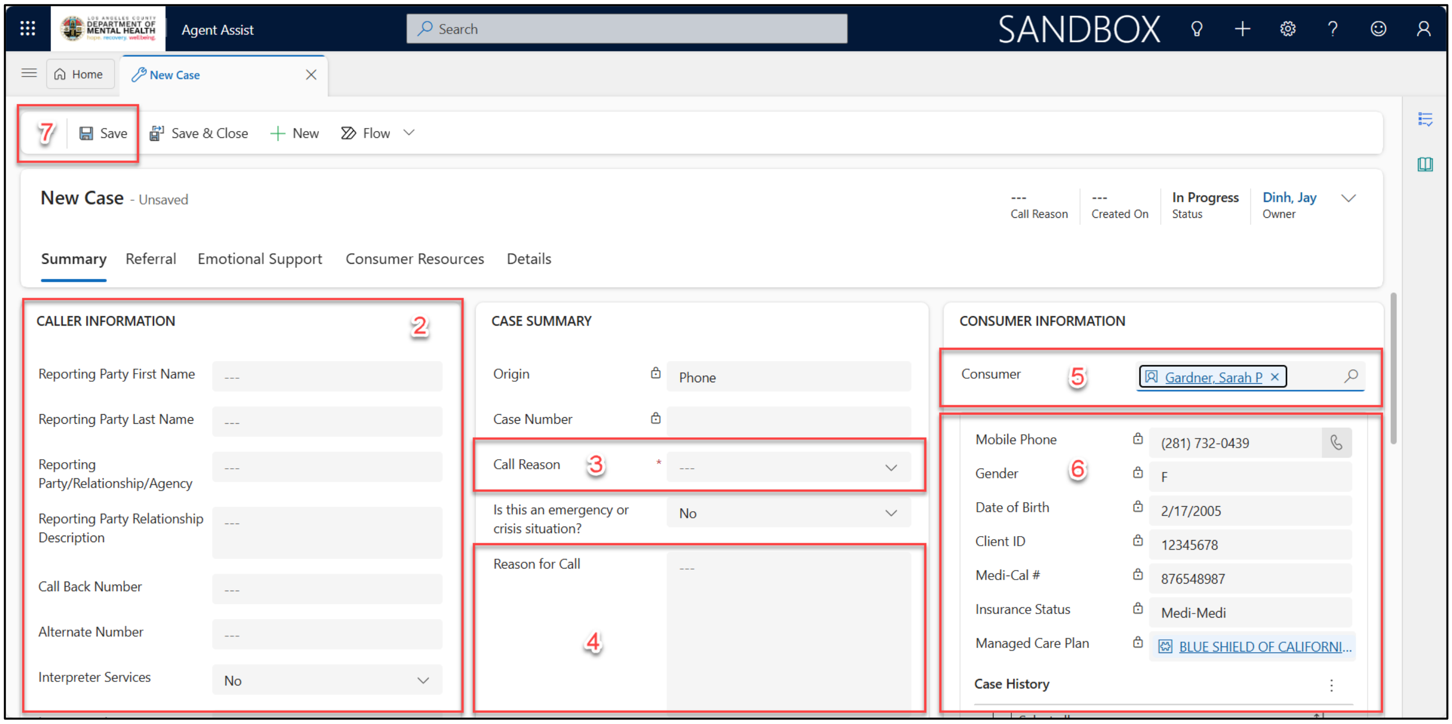
General Information

1. From the **Home Page**, click **+New Case** in the Command bar.
2. Gather the **Caller Information**.
3. In the **Call Reason** field, input General Information.
4. In the **Reason for Call** field, enter the reason for call.
5. In the **Consumer field**, enter the desired Consumer OR create a new consumer by clicking +New and filling out the required fields on the Quick Create Form. Any information entered on the Quick Create Form will populate on the Consumer's form once created.
6. Once a Consumer is selected, check that the data has populated in the **Consumer Information** section.
7. In the Command bar, click **Save.**

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

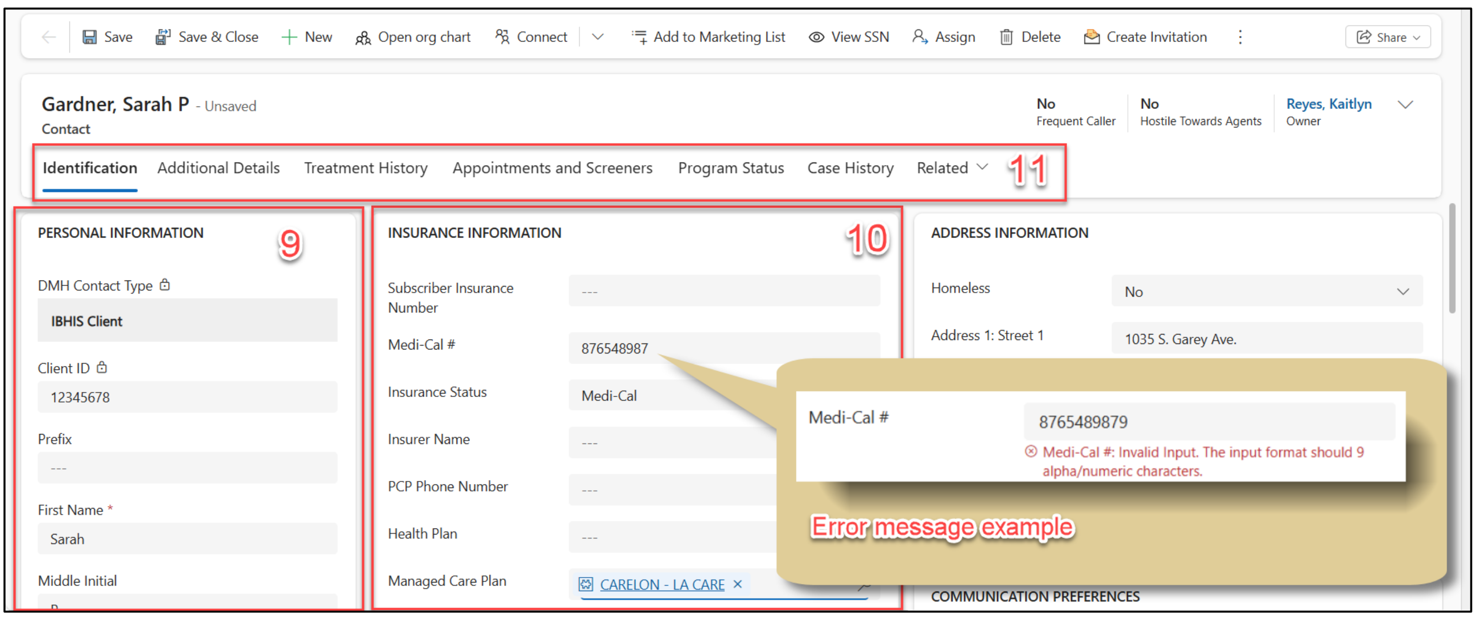
Note: If you need to search for an existing consumer, you can type their name, email, client ID, DOB, Medi-Cal #, and last 4 digits of SSN in the Search field. You can select the magnifying glass and then click Advanced Search to open the entire consumer lookup table. In the Advanced Find, you can also search by the same criteria. Most, if not all, of your consumer record searches will begin in the advanced Find section.

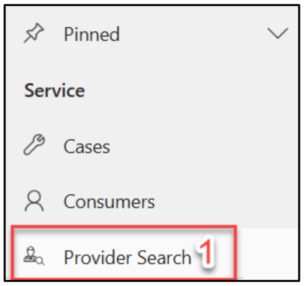
Note: The Consumer can also opt in to receive Email and SMS notifications if they are calling for themselves. This is not required at the time of creating a new case and can also be inputted on the Consumer record later.



For additional resources, visit the Adaptive Learning Platform.

8. Clicking into the **consumer record** (blue hyperlink) will allow you to make any additional changes as needed. As part of your current workflow, you are navigating to the state website to check for Medi-Cal eligibility during each call. You would input that information here.
9. On the left-hand side, you will see the Personal Information section.
10. In the middle, is the Insurance Information. Here is where you will put the client's **Medi-Cal CIN #** and **Managed Care Plan**. The Medi-Cal CIN # field has validation to only accept 9 alpha/numeric characters. An error message will appear if it is input incorrectly. Input the **Insurance Status**. Notice that if Medi-Cal or any combination of Medi-Cal is selected, Managed Care Plan becomes a required field.
11. There are multiple tabs at the top, such as Treatment History and Program Status. If the consumer is a DMH client, they will have a client ID assigned to them and you will be able to see their past service history and episode history here. This is being retrieved directly from IBHIS.
12. When a client has been created and has an assigned client ID, any updates made in the Agent Assist application, such as DOB, gender, first or last name, will automatically send an update to IBHIS.
13. The same occurs when a change is made to IBHIS, it will automatically get updated in Agent Assist. Although you will no longer be using IBHIS, if a provider updates the client information, it will be reflected in real time here. So it's extremely helpful that we do have bi-directional integration now between the two systems.
14. Now, **Save** the case to create a new case record. Once the case is saved, the full command bar will display and any sub-grids in the form will become active and may populate with data, depending on key words entered in the Case and call history with the consumer.



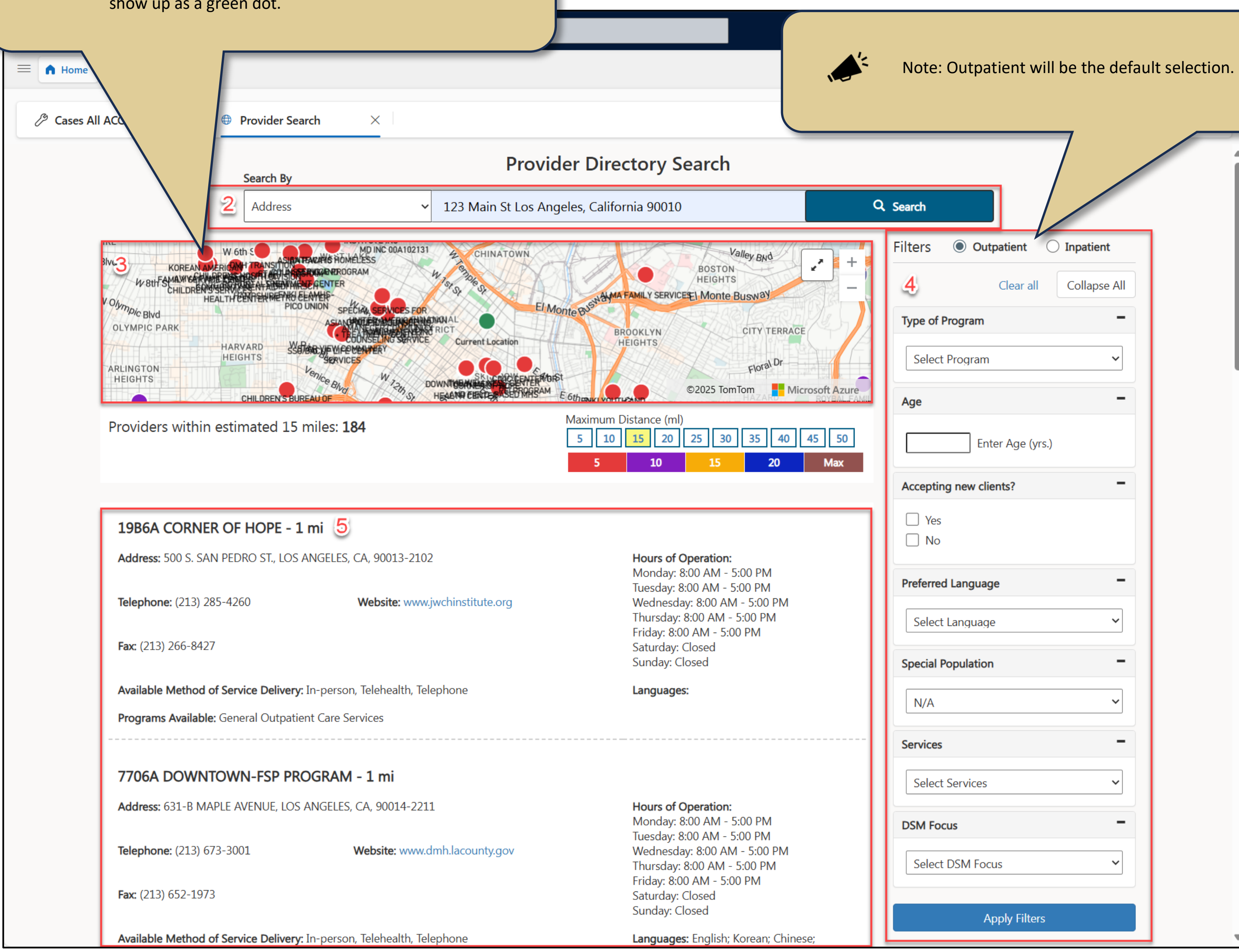


Using Provider Search

1. Use the Provider Search to look for general provider information. On the Site Map, select **Provider Search.**
2. In the **Provider Search,** navigate to **Search By >** expand **drop down** to either select Address or Provider Name/Number. In the **search bar** to the right, enter the desired Address or Provider Name/Number. If you input the address first and then select Address in the Search By field, you do not need to click the search button. It will auto search for you. It will automatically search for providers estimated within 15 miles of the address. You may expand this up to 50 miles by selecting additional distance buttons.
3. **Expand** the Map by zooming in and out as needed. The current location is based on the address or zip code provided. Hover over the nodes to view provider information.
4. Select the **filters** to narrow the search. Outpatient will be the default selection. Once all necessary filters are applied, click **Apply Filters**.
5. Review the **search results.** If you want a deeper diver into their services, click the **provider website link**.

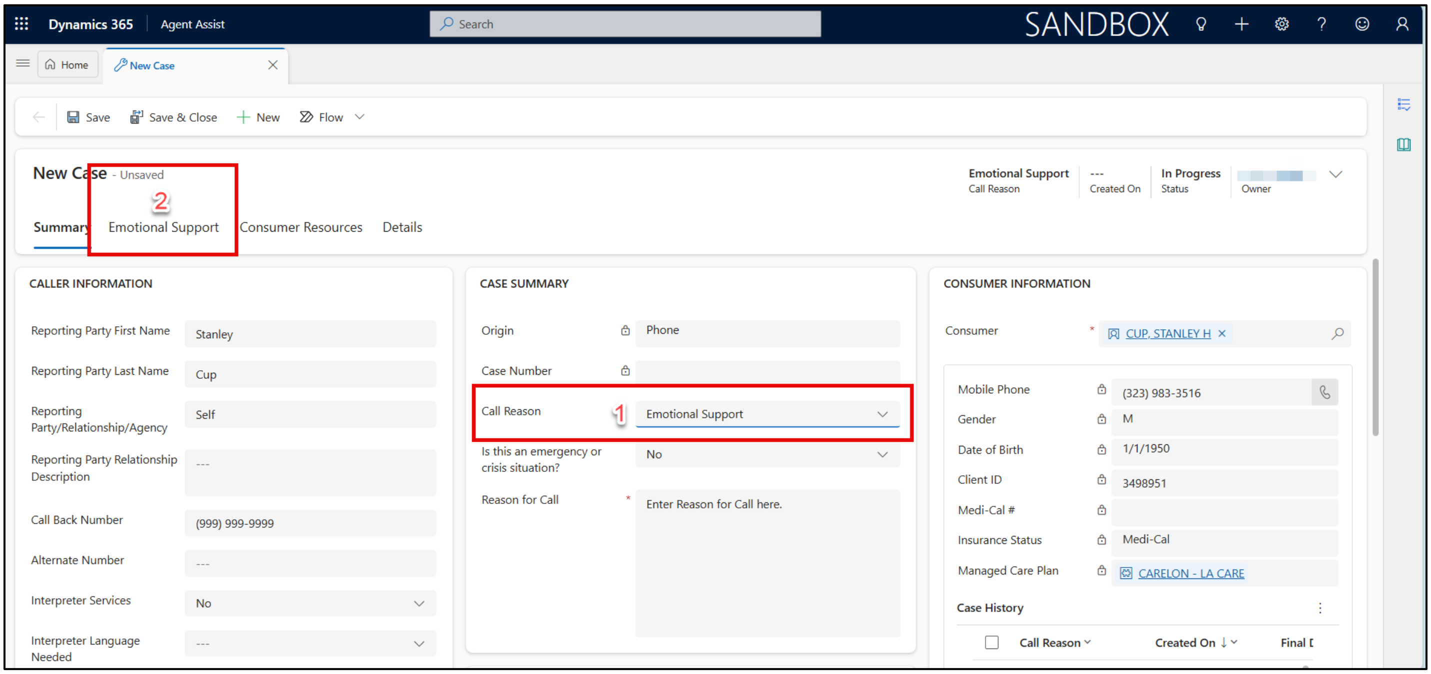
Note: The pinpoint colors change depending on the distance of the address searched for. If you are not searching by zip code, based on location, the dot will show up as a green dot.

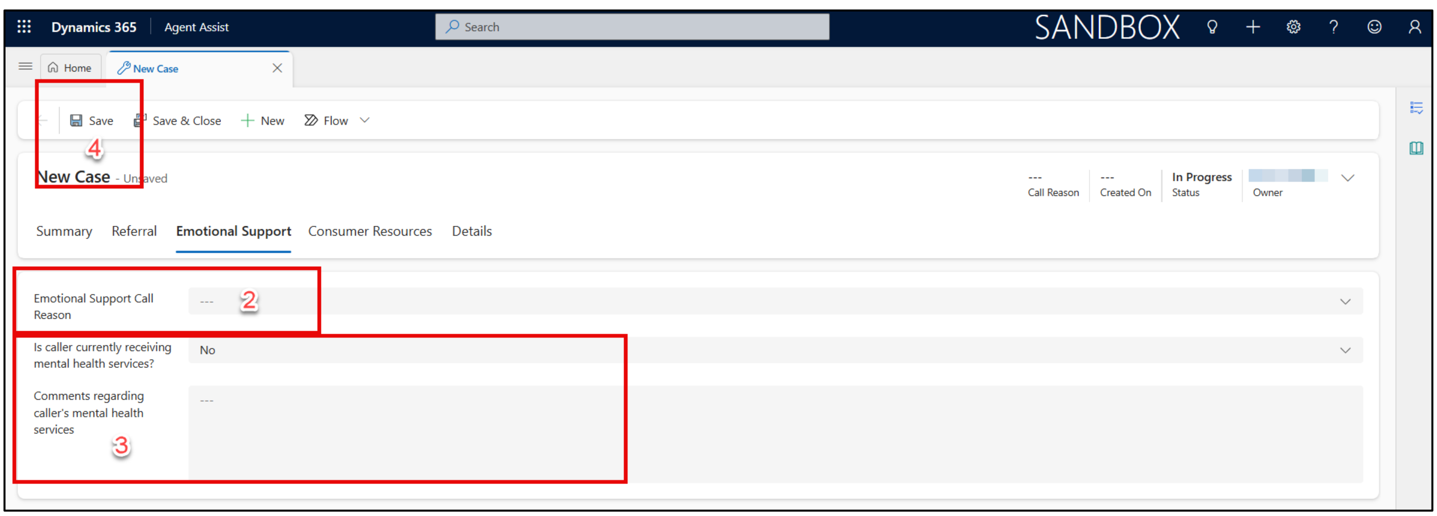
Note: Outpatient will be the default selection.



Emotional Support

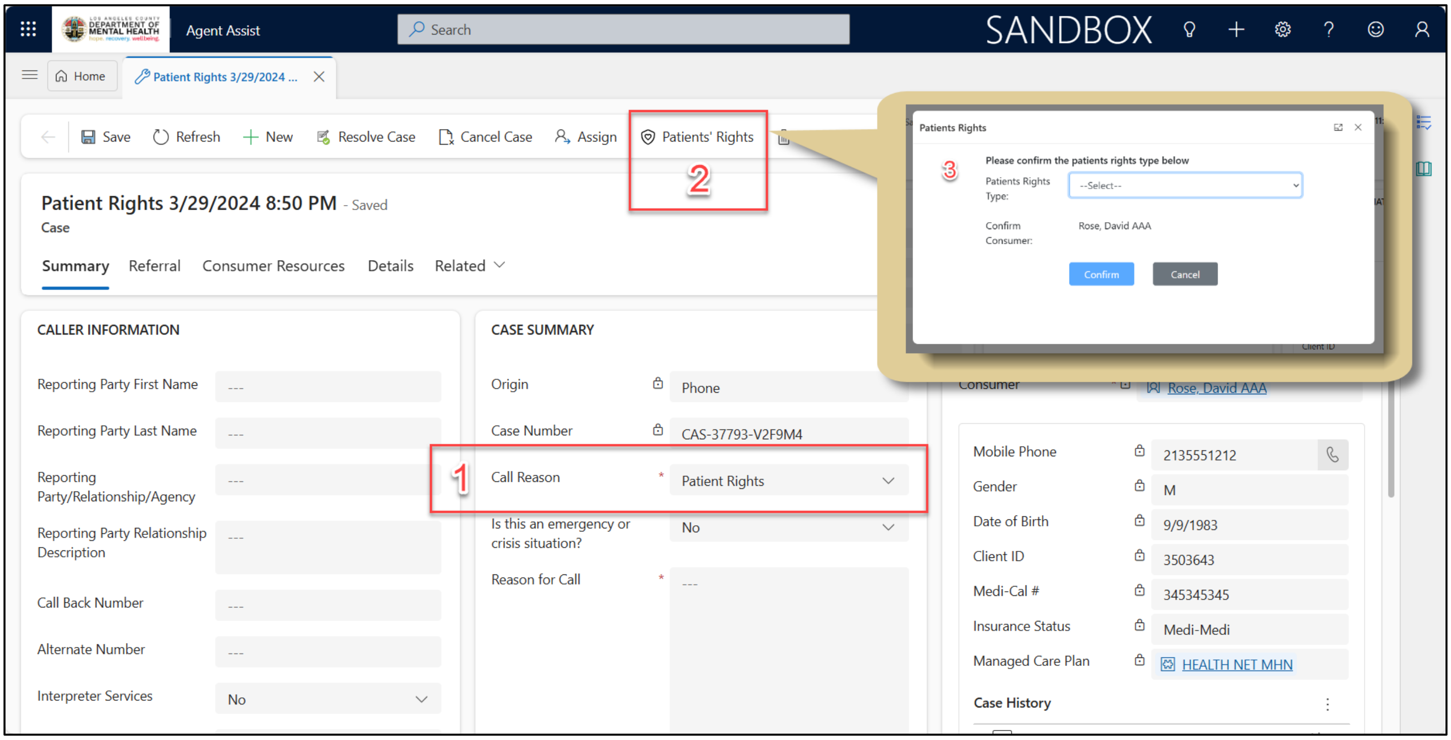
1. To create an emotional support case, create a new case as you would from the "Create a New Case" steps. Gather the Caller Information, select Call Reason as "Emotional Support" and locate the desired consumer in the **Consumer** field.
2. Navigate to the **Emotional Support** tab. In the Emotional Support Call Reason field, select the appropriate option.
3. The remaining fields in this section are optional and you may complete them at your discretion.
4. Then, Click **Save** and **Resolve Case** if you are finished**.**





Patients' Rights

1. To create a Patients' Rights case, create a new case as you would from the "Create a New Case" steps. Gather the Caller Information, select <u>Call Reason</u> as "Patient Rights" and locate the desired consumer in the **Consumer** field.
2. Then, click on the **Patients' Rights button** in the Command bar.
3. In the <u>Patients Rights Type</u> field, select the appropriate option. Then, click **Confirm.**

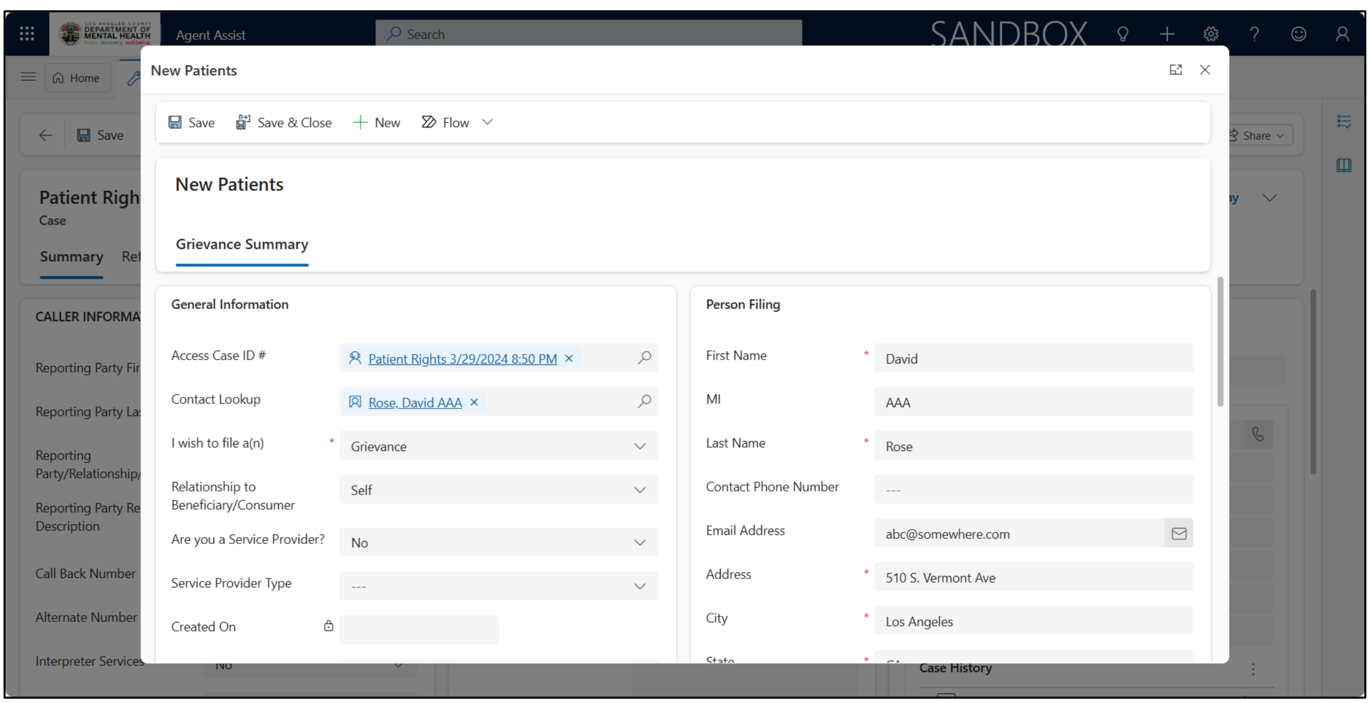


4. To fill out the Grievance Summary, the next steps are based on the selection of the Patients Rights type:

- If **Self** is selected:
    1. In the Person Filing Section, consumer information should be mapped over from the case record for all of the following fields: First Name, MI, Last Name, Contact Phone Number, Email Address, Address, City, State, Zip Code
    2. In the Consumer Information Section, consumer information should be mapped over from the case record for all of the following fields: First Name, MI, Last Name, Contact Phone Number, Email Address, Address, City, State, Zip Code, Birth Date, Medi-Cal #
    3. In the **Filed Against Section** complete the name of the <u>Name of Facility/Provider/Program</u> using any value.
    4. Fill in <u>What is the complaint?</u>
    5. Complete the additional fields at your discretion
    6. Click **Save and Close (**Note: Clicking Save and Close sends the completed form to the Patients Rights Office._
- If **Family** is selected:
    1. In the Person Filing Section, the following information should be mapped over from the case record for all of the following fields: First Name, Last Name, Contact Phone Number.
    2. Complete the **following fields:** Address, City, State, Zip Code
    3. In the Consumer Information Section, consumer information should be mapped over from the case record for all of the following fields: First Name, MI, Last Name, Contact Phone Number, Email Address, Address, City, State, Zip Code, Birth Date, Medi-Cal #
    4. In the **Filed Against Section** complete the name of the <u>Name of Facility/Provider/Program</u> using any value.
    5. Fill in <u>What is the complaint?</u>
    6. Complete the additional fields at your discretion
    7. Click **Save and Close (**Note: Clicking Save and Close sends the completed form to the Patients Rights Office._

- If **Provider/Practitioner** is selected:
  1. In the **General Information section**, Are you a Service Provider is defaulted to **No.**
  2. Chang to **Yes, and** select a Service Provider Type.
  3. In the Person Filing Section, the following information should be mapped over from the case record: First Name, Last Name, Contact Phone Number
  4. Complete the following fields: Address, City, State, Zip Code
  5. In the Consumer Information Section, consumer information should be mapped over from the case record for all of the following fields: First Name, MI, Last Name, Contact Phone Number, Email Address, Address, City, State, Zip Code, Birth Date, Medi-Cal #
  6. In the **Description of Grievance Section,** complete the Provider Resolution and What did you do to resolve fields.
  7. In the **Filed Against Section** complete the name of the Name of Facility/Provider/Program using any value.
  8. Fill in What is the complaint?
  9. Complete the additional fields at your discretion
  10. Click **Save and Close (**Note: Clicking Save and Close sends the completed form to the Patients Rights Office._
- If **Conservator** is selected:
  1. In the Person Filing Section, the following information should be mapped over from the case record: First Name, Last Name, Contact Phone Number
  2. Complete the following fields: Address, City, State, Zip Code
  3. In the Consumer Information Section, consumer information should be mapped over from the case record for all of the following fields: First Name, MI, Last Name, Contact Phone Number, Email Address, Address, City, State, Zip Code, Birth Date, Medi-Cal #
  4. In the **Filed Against Section** complete the name of the Name of Facility/Provider/Program using any value.
  5. Fill in What is the complaint?
  6. Complete the additional fields at your discretion
  7. Click **Save and Close (**Note: Clicking Save and Close sends the completed form to the Patients Rights Office._

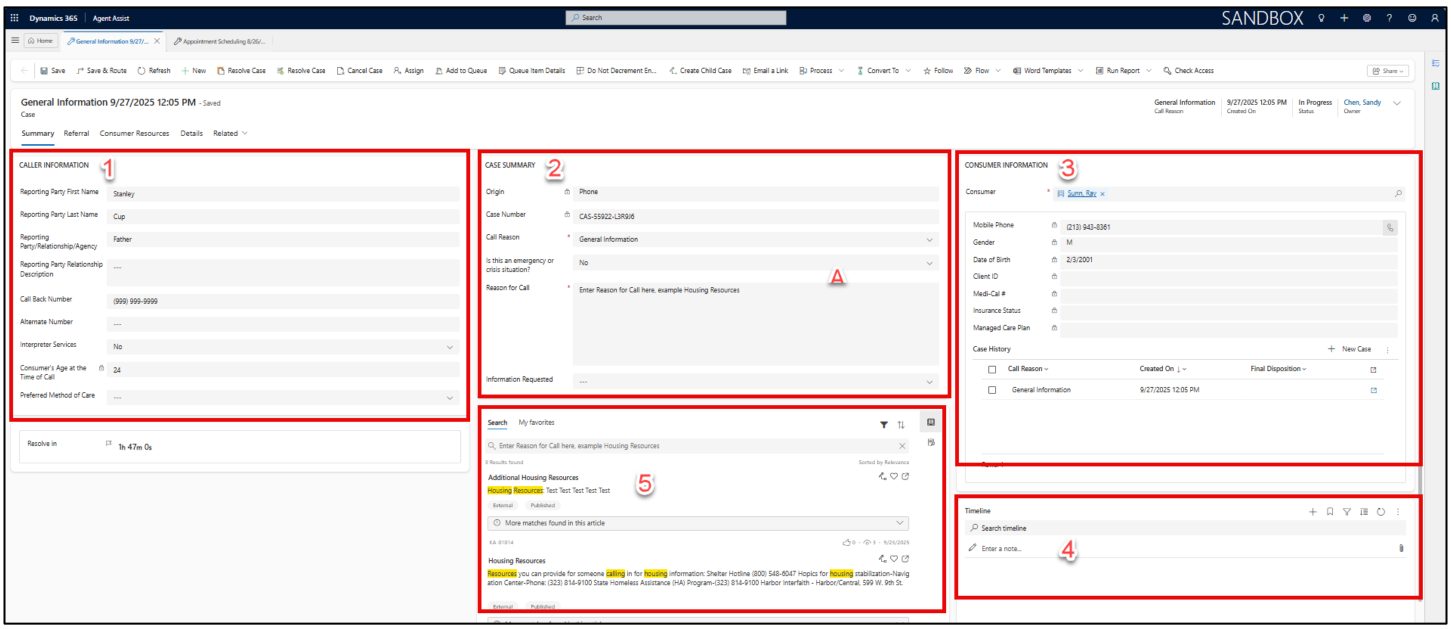
- Remember to **Resolve the Case.**



General Navigation: Case Record

Summary Tab

1. **Caller Information:** Details on the Reporting Party, Call Back information, and more.
2. **Case Summary:** Case details such as the Case Number, Call Reason, Reason for Call, and more.
3. **Consumer Information/Case History:** Consumer information populated from filling out the Consumer form. Displays details associated with the Consumer and active call records.
4. **Timeline:** If any additional calls were made during the same call, enter a note here.
5. **Knowledge articles:** Search across knowledge articles using a relevant keyword. If the <u>Reason for Call</u> field is populated, relevant Knowledge Articles will appear based on the context of the case.



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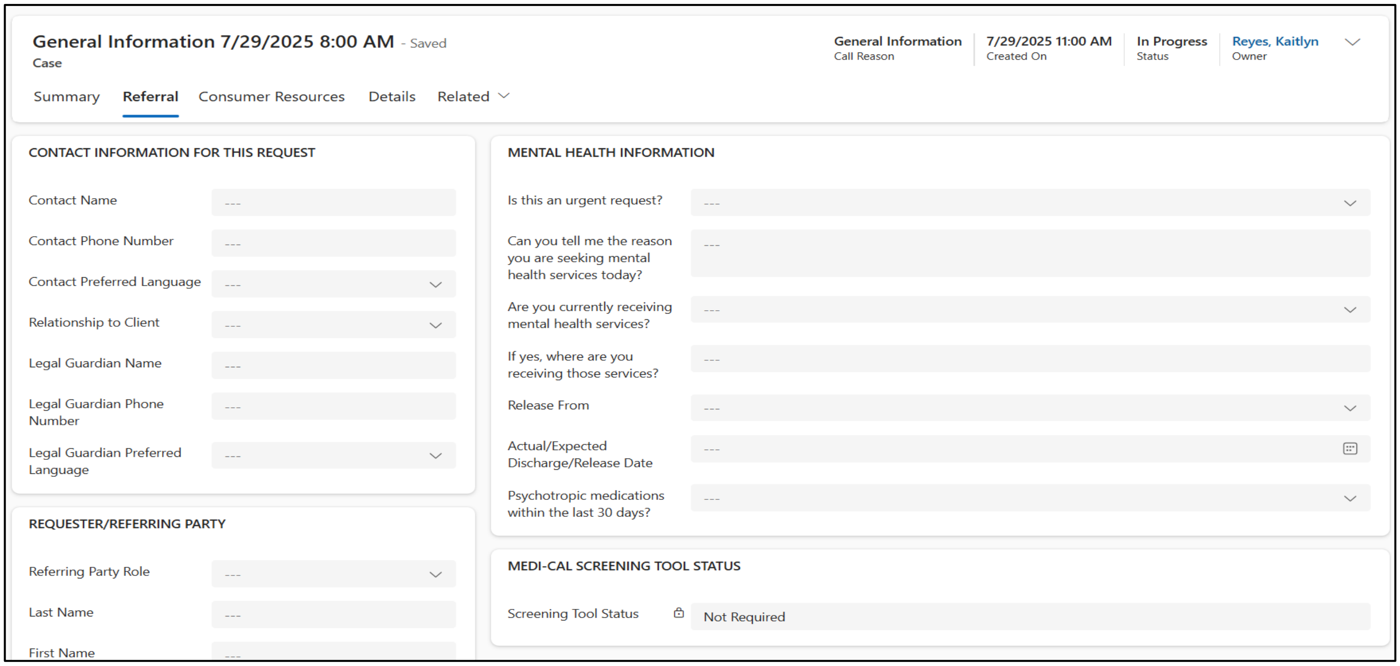
Referral Tab

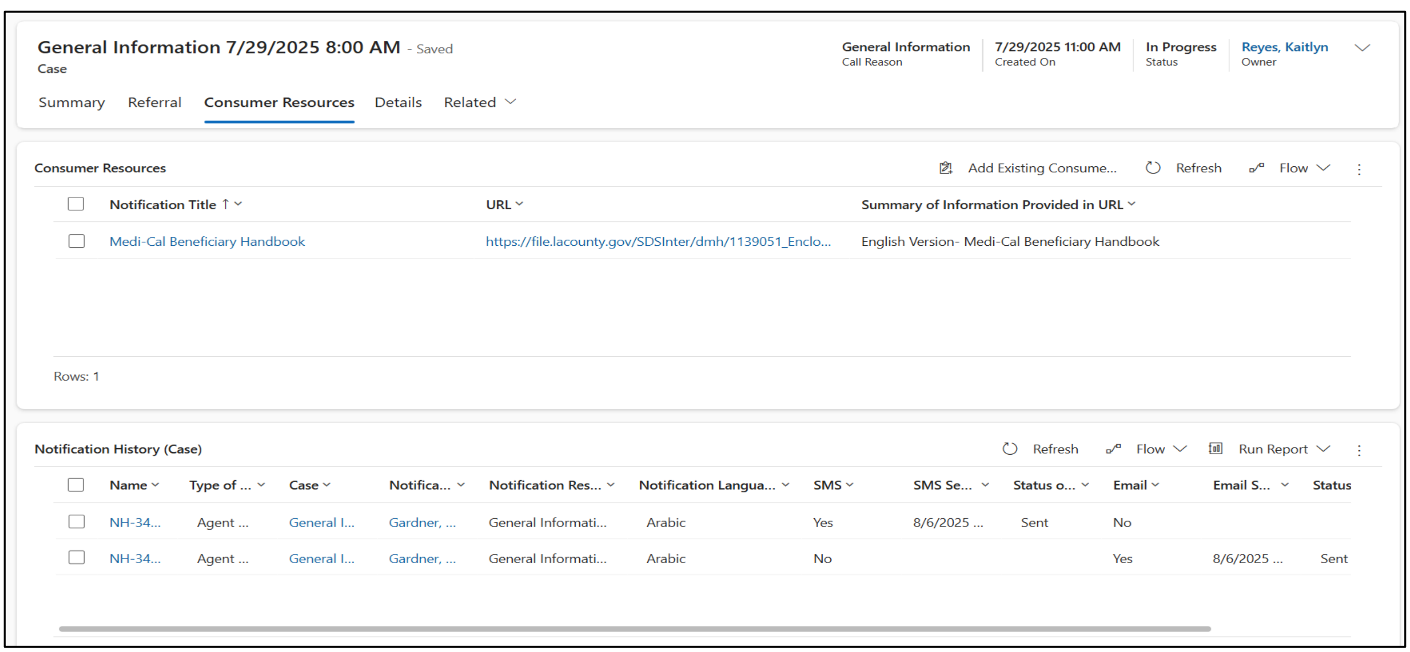
- Mandatory information in the event the agent is referring the Consumer to a provider or the appointment is being booked. Find the Contact Information for this Request, Requester/Referring Party, Mental Health Information, and the Medi-Cal Screening Tool Status.

Note: The Mental Health Information fields may change depending on the Reason for Call.
Note: **Contact Information For This Request** is required if this is an MCP Referral



Consumer Resources tab

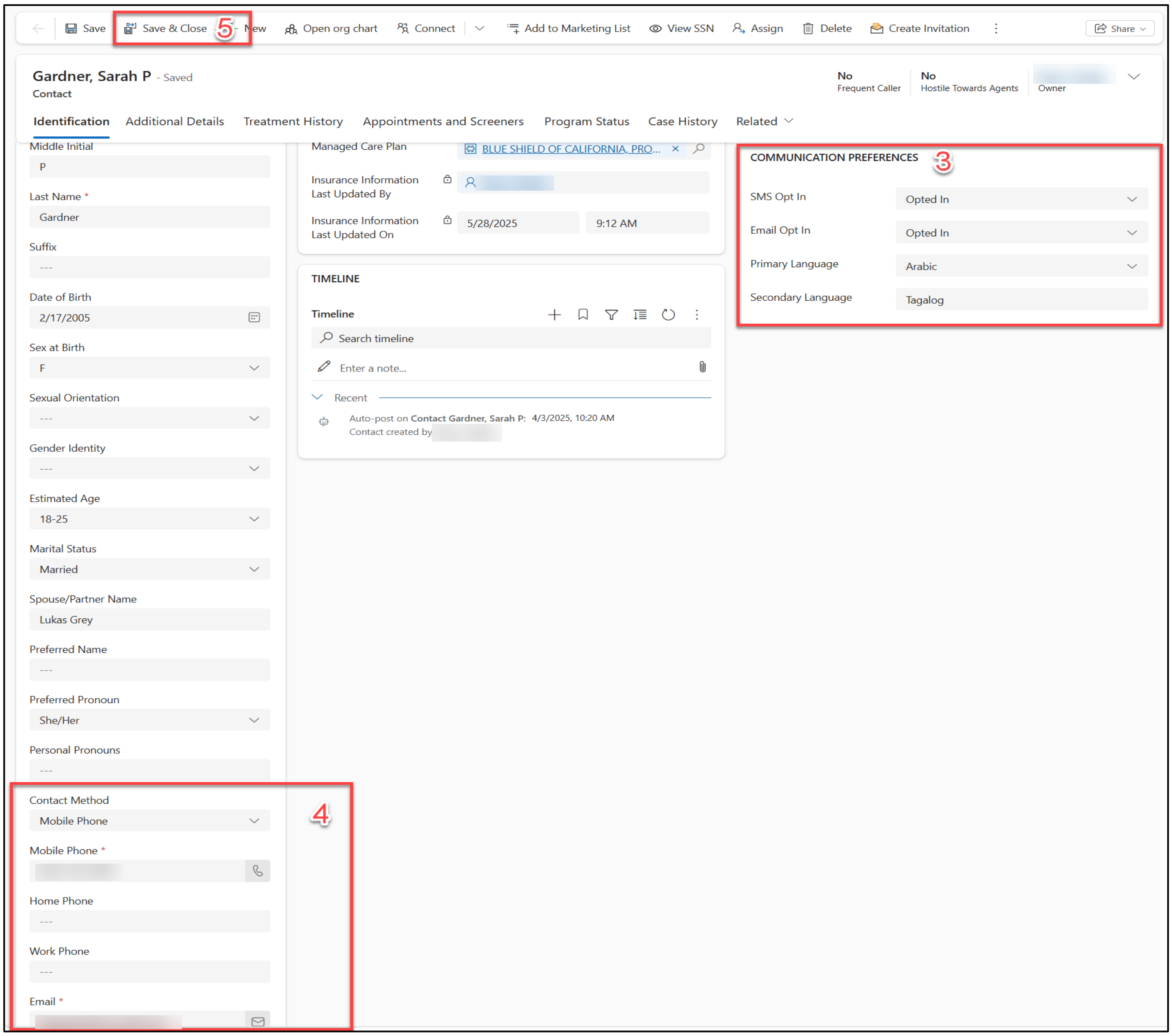
- **Consumer Resources:** In the event the agent wants to share information, such as the Medi-Cal Beneficiary Handbook, add and share a consumer resource here.
- **Notification History:** See a list of notifications that have been sent as well as send status.



For additional resources, visit the Adaptive Learning Platform.

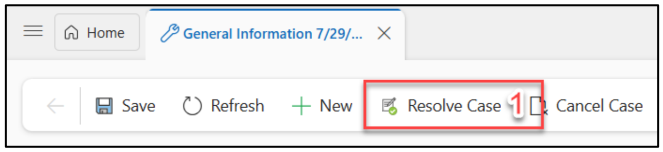
Update Consumer Communication Preferences

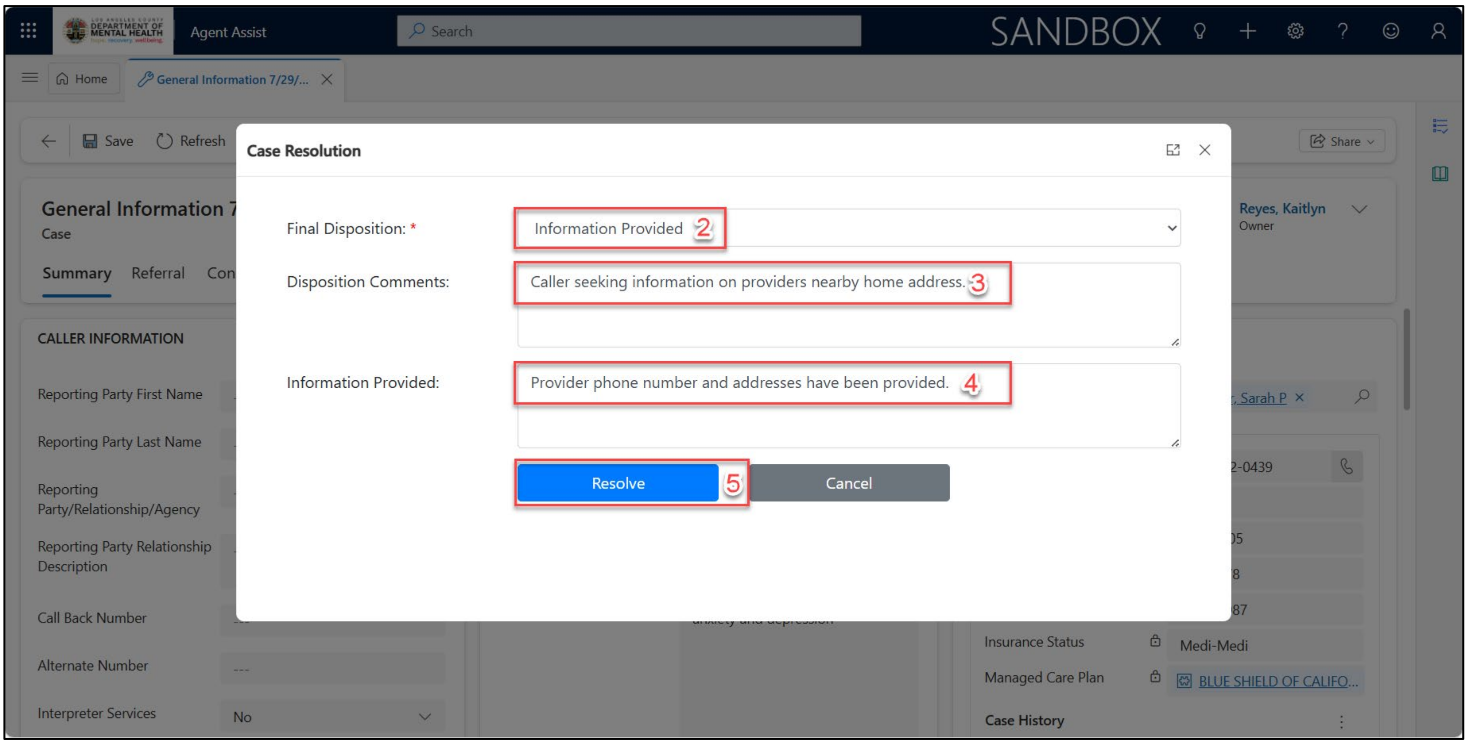
1. You can update communication preferences by opting them in to either email or SMS messages. Navigate to the Consumer record. You can navigate to the Consumer record from the newly created case.
2. In the Consumer Information section, navigate to the **Consumer name hyperlink** to open the Consumer record.
3. In the Communications Preferences section, in the **SMS Opt In field** and **Email Opt In field**, select either Opted In or Opted Out. Additionally, fill in their **Primary** and/or **Secondary Language.**
4. Once **Opted In** is selected, navigate to the Personal Information section and provide either a **Mobile Phone Number** and/or **Email Address**.
5. Navigate to the Command bar > **Save and Close**
6. When notifications are sent out to the Consumer, view the notification history in the Consumer Resources tab in the Case record.



Resolving a Case

1. Once all the necessary information is provided to the consumer, the Case is ready to be resolved. Navigate to the Command Bar > **Resolve Case button**
2. In the **Final Disposition field,** select the desired option. The selection changes depending on the Call Reason.
3. In the **Disposition Comments** field, if desired, enter a comment depending on the disposition.
4. If desired, enter the **Information Provided**
5. Click **Resolve.**
6. After you resolve the case, the Case record will return to "**Read-Only**" and the status is "**Resolved**." You cannot edit any additional information.





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