



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.

The screenshot displays the 'New Case' form in the Agent Assist application. The interface includes a top navigation bar with 'Home' and 'New Case' buttons. The form is divided into three main sections: 'CALLER INFORMATION', 'CASE SUMMARY', and 'CONSUMER INFORMATION'. Red boxes and numbers highlight specific elements:

- 1:** The 'Save' button in the top command bar.
- 2:** The 'Reporting Party' fields in the 'CALLER INFORMATION' section.
- 3:** The 'Call Reason' dropdown menu in the 'CASE SUMMARY' section.
- 4:** The 'Reason for Call' text area in the 'CASE SUMMARY' section.
- 5:** The 'Consumer' search field in the 'CONSUMER INFORMATION' section.
- 6:** The 'Gender' dropdown menu in the 'CONSUMER INFORMATION' section.



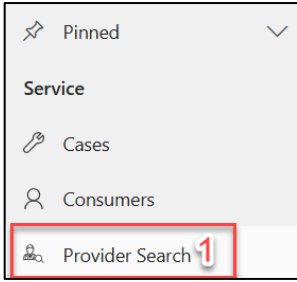
For additional resources, visit the Adaptive Learning Platform.



- 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.
- On the left-hand side, you will see the Personal Information section.
- 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.
- 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.
- 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.
- 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.
- 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.

The screenshot shows the Microsoft D365 Agent Assist interface for a client named Sarah P. Gardner. The form is divided into three main sections: PERSONAL INFORMATION (9), INSURANCE INFORMATION (10), and ADDRESS INFORMATION (11). The PERSONAL INFORMATION section includes fields for DMH Contact Type (IBHIS Client), Client ID (12345678), Prefix, First Name (Sarah), and Middle Initial. The INSURANCE INFORMATION section includes Subscriber Insurance Number, Medi-Cal # (876548987), Insurance Status (Medi-Cal), Insurer Name, PCP Phone Number, Health Plan, and Managed Care Plan (CARELON - LA CARE). The ADDRESS INFORMATION section includes Homeless (No) and Address 1: Street 1 (1035 S. Garey Ave.). A callout box highlights an error message for the Medi-Cal # field: "Medi-Cal #: Invalid Input. The input format should be 9 alpha/numeric characters." The error message is labeled "Error message example".





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.

The screenshot shows the 'Provider Directory Search' interface. At the top, there is a navigation bar with 'Home' and 'Cases All ACC'. Below it, the 'Provider Search' section has a 'Search By' dropdown set to 'Address' and a search bar containing '123 Main St Los Angeles, California 90010'. A red box highlights the search bar and the 'Search' button. Below the search bar is a map showing various provider locations as colored dots. A red box highlights the map area. Below the map, there are buttons for 'Providers within estimated 15 miles: 184' and a distance selector with options from 5 to 50 miles. A red box highlights the distance selector. On the right side, there is a 'Filters' panel with options for 'Outpatient' (selected) and 'Inpatient'. Below this are sections for 'Type of Program', 'Age', 'Accepting new clients?', 'Preferred Language', 'Special Population', 'Services', and 'DSM Focus'. A red box highlights the entire filters panel. At the bottom of the filters panel is an 'Apply Filters' button. Below the map, there are two provider cards. The first card is for '1986A CORNER OF HOPE - 1 mi' with address '500 S. SAN PEDRO ST., LOS ANGELES, CA, 90013-2102', telephone '(213) 285-4260', website 'www.jwch.institute.org', and hours of operation. The second card is for '7706A DOWNTOWN-FSP PROGRAM - 1 mi' with address '631-8 MAPLE AVENUE, LOS ANGELES, CA, 90014-2211', telephone '(213) 673-3001', website 'www.dmh.lacounty.gov', and hours of operation. A red box highlights both provider cards.



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.

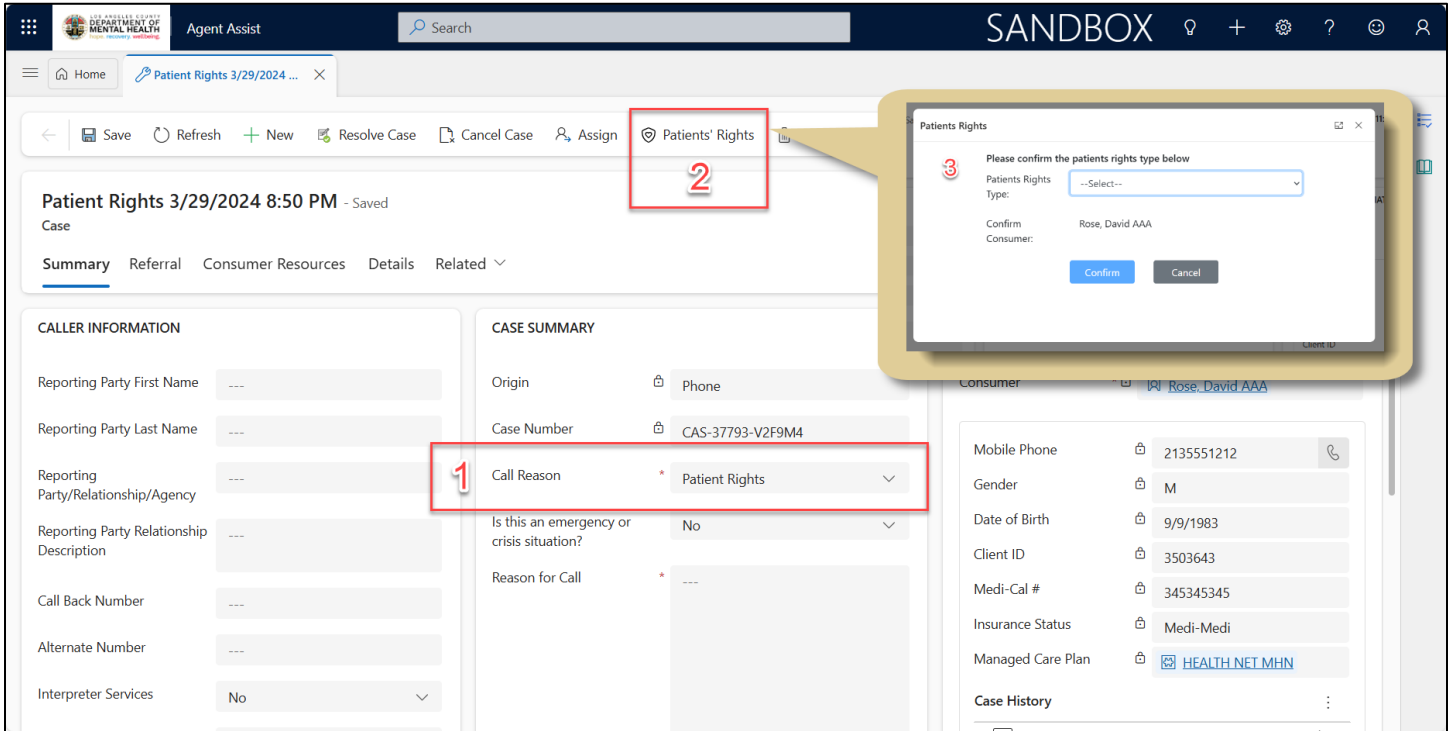
The screenshot shows the 'New Case' form in Dynamics 365 Agent Assist. The 'Call Reason' dropdown menu is highlighted with a red box and a circled '1', showing 'Emotional Support' selected. Other fields include 'Reporting Party First Name' (Stanley), 'Reporting Party Last Name' (Cup), 'Reporting Party/Relationship/Agency' (Self), 'Call Back Number' ((999) 999-9999), and 'Consumer' (CUP.STANLEY.H).

The screenshot shows the 'New Case' form in Dynamics 365 Agent Assist, specifically the 'Emotional Support' tab. The 'Emotional Support Call Reason' dropdown is highlighted with a red box and a circled '2'. Below it, the 'Is caller currently receiving mental health services?' field is highlighted with a red box and a circled '3', with 'No' selected. The 'Save' button is highlighted with a red box and a circled '4'.



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 Call Reason 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 Patients Rights Type 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 Name of Facility/Provider/Program using any value.
 4. Fill in What is the complaint?
 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 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.)



- 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**.

The screenshot shows the 'New Patients' form in the Microsoft D365 Agent Assist interface. The form is titled 'New Patients' and has a 'Grievance Summary' section. Below this, there are two main sections: 'General Information' and 'Person Filing'. The 'General Information' section includes fields for 'Access Case ID #' (with a value of 'Patient Rights 3/29/2024 8:50 PM'), 'Contact Lookup' (with a value of 'Rose, David AAA'), 'I wish to file a(n)' (with a value of 'Grievance'), 'Relationship to Beneficiary/Consumer' (with a value of 'Self'), 'Are you a Service Provider?' (with a value of 'No'), 'Service Provider Type' (with a value of '---'), and 'Created On'. The 'Person Filing' section includes fields for 'First Name' (with a value of 'David'), 'MI' (with a value of 'AAA'), 'Last Name' (with a value of 'Rose'), 'Contact Phone Number' (with a value of '---'), 'Email Address' (with a value of 'abc@somewhere.com'), 'Address' (with a value of '510 S. Vermont Ave'), 'City' (with a value of 'Los Angeles'), and 'State' (with a value of 'CA'). The form is displayed in a 'Sandbox' environment.



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 Reason for Call field is populated, relevant Knowledge Articles will appear based on the context of the case.

The screenshot displays the Microsoft Dynamics 365 Agent Assist interface for a case record. The interface is divided into several sections, each highlighted with a red box and a numbered callout:

- 1. CALLER INFORMATION:** This section contains fields for Reporting Party First Name (Stanley), Reporting Party Last Name (Cup), Reporting Party/Relationship/Agency (Father), Reporting Party/Relationship/Agency Description, Call Back Number (0991-999-9999), Alternate Number, Interpreter Services (No), Consumer's Age at the Time of Call (24), and Preferred Method of Care.
- 2. CASE SUMMARY:** This section includes Origin (Phone), Case Number (CAS-55922-L3R695), Call Reason (General Information), Is this an emergency or crisis situation? (No), Reason for Call (Enter Reason for Call here, example Housing Resources), and Information Requested.
- 3. CONSUMER INFORMATION:** This section displays Consumer details such as Mobile Phone ((213) 943-8361), Gender (M), Date of Birth (2/3/2001), Client ID, Med-Cal #, Insurance Status, and Managed Care Plan. It also includes a Case History table with columns for Call Reason, Created On, and Final Disposition.
- 4. Timeline:** This section is titled "Timeline" and contains a "Search timeline" field and an "Enter a note..." field.
- 5. Knowledge Articles:** This section shows search results for "Housing Resources". It includes a "My favorites" section and a list of articles, such as "Additional Housing Resources" and "Housing Resources".



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

General Information 7/29/2025 8:00 AM - Saved General Information Call Reason | 7/29/2025 11:00 AM Created On | In Progress Status | Reyes, Kaitlyn Owner

Case

Summary **Referral** Consumer Resources Details Related

CONTACT INFORMATION FOR THIS REQUEST

Contact Name: ---

Contact Phone Number: ---

Contact Preferred Language: ---

Relationship to Client: ---

Legal Guardian Name: ---

Legal Guardian Phone Number: ---

Legal Guardian Preferred Language: ---

MENTAL HEALTH INFORMATION

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? ---

If yes, where are you receiving those services? ---

Release From: ---

Actual/Expected Discharge/Release Date: ---

Psychotropic medications within the last 30 days? ---

REQUESTER/REFERRING PARTY

Referring Party Role: ---

Last Name: ---

First Name: ---

MEDI-CAL SCREENING TOOL STATUS

Screening Tool Status: Not Required

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.

General Information 7/29/2025 8:00 AM - Saved General Information Call Reason | 7/29/2025 11:00 AM Created On | In Progress Status | Reyes, Kaitlyn Owner

Case

Summary Referral **Consumer Resources** Details Related

Consumer Resources Add Existing Consume... Refresh Flow

<input type="checkbox"/>	Notification Title ↑	URL	Summary of Information Provided in URL
<input type="checkbox"/>	Medi-Cal Beneficiary Handbook	https://file.lacounty.gov/SDSInter/dmh/1139051_Encl...	English Version- Medi-Cal Beneficiary Handbook

Rows: 1

Notification History (Case) Refresh Flow Run Report

<input type="checkbox"/>	Name	Type of ...	Case	Notifica...	Notification Res...	Notification Langua...	SMS	SMS Se...	Status o...	Email	Email S...	Status
<input type="checkbox"/>	NH-34...	Agent ...	General I...	Gardner, ...	General Informati...	Arabic	Yes	8/6/2025 ...	Sent	No		
<input type="checkbox"/>	NH-34...	Agent ...	General I...	Gardner, ...	General Informati...	Arabic	No			Yes	8/6/2025 ...	Sent



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.

The screenshot displays the Microsoft Dynamics 365 Agent Assist interface for a consumer record. The record is for Sarah P. Gardner. The interface is divided into several sections:

- Command Bar:** Located at the top, it includes a 'Save & Close' button highlighted with a red box and the number 5.
- Consumer Information:** A section on the left containing fields for Identification (Middle Initial, Last Name, Suffix, Date of Birth, Sex at Birth, Sexual Orientation, Gender Identity, Estimated Age, Marital Status, Spouse/Partner Name, Preferred Name, Preferred Pronoun, Personal Pronouns) and Additional Details (Managed Care Plan, Insurance Information).
- COMMUNICATION PREFERENCES:** A section on the right, highlighted with a red box and the number 3, containing fields for SMS Opt In, Email Opt In, Primary Language, and Secondary Language. All three preference fields are set to 'Opted In'.
- Contact Method:** A section at the bottom left, highlighted with a red box and the number 4, containing fields for Contact Method (set to 'Mobile Phone'), Mobile Phone, Home Phone, Work Phone, and Email.
- TIMELINE:** A section in the center-right containing a search bar, a note entry field, and a list of recent events, including an auto-post on the contact.



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.

