ISmart Concerned Other Assessment

A Concerned Other is a client who is not the substance user but is affected by a Significant Other's substance use. These clients generally have their services provided by ASAC's Family Therapists. This is how you enter a Concerned Other Client Assessment into ISmart.

1. Client Search Screen – Search for client by using wildcard name search.
   (For more information on performing a Client Search, please see section A.4 – Client Search.)
   a. If client exists in ISmart then go to Episode List and make sure that:
      i. There is NOT a current open ISmart file
      ii. That the last case is an assessment with in the last 90 days.
      iii. If neither of these is true then go back to the Client Profile and update all info entered into that module. (Left hand menu bar, click on Client Profile. Skip to#2.)
      iv. If either of these is true then you need to speak with someone in Data or your supervisor for further assistance.
   b. Client does not exist in ISmart system: then click on the Add Client hyperlink, this takes you to the first screen of the Client Profile.

2. Client Profile –
   (For more information on the Client Profile, please see Appendix B.)
   a. *Client Profile screen*-enter info.
      Save
      Next
   b. *Alternative Names screen*-enter info (if applicable.)
      Next
   c. *Additional Information screen*- enter info.
      Next
   d. *Contact Info screen*-enter phone info.
      Click on Add Address – enter info.
      Finish
      Next
   e. *Collateral Contacts screen-*
      Click on Add Contact
      Save
      Add Contact again (if appropriate.)
      Finish

3. Left Hand menu click on Episode List

4. Click on Start New Episode

5. Intake Screen- enter info
   (For more information on the Intake Screen, please see Appendix B.)
   Finish

6. Left Hand menu click on Crisis and Placement

7. At Crisis and Placement Screening screen, click on Add New Placement Screening hyperlink.
   (For more information on the Crisis/Placement Screening, please see Appendix B.)
   a. *Profile screen –*
      i. At the Screening/Admission for Concerned Person question, choose Yes.

ii. Fill in only the yellow boxes on this screen.
iii. Next

b. *Financial Info screen* – Fill in the Expected Payment Source box and the yellow boxes.

Next

c. *Youth Admission screen* – you may skip this screen.

Next

d. *Substance Abuse screen* – At this screen you would use the Comments box to list what family member the client is here for, how much that person has used, the dates of last use and any other pertinent information about the clients significant others substance use.

Next

e. *Legal History screen* – you may skip this screen.

Next

f. *ASAM screen* – Fill in the Recommended Environment box and any other boxes if you feel it necessary.

Save

g. Left hand menu bar, click on *Diagnosis*. Fill this out if appropriate.

Save

8. Left Hand menu bar, click on Program Enroll

(For more information on the Program Enrollment, please see Appendix B.)

Click on <u>Add Enrollment</u> – enter info for Assessment Program.

Finish

9. Left Hand menu bar, click on Notes

(For more information on the Notes, please see Appendix B OR Section F.)

Click on <u>Add New Billable Note</u>

a. *Profile screen* – enter info

Next

b. *Encounter Note screen* – enter note.

Next

c. *Services screen* – enter info

Finish

10. Left Hand menu bar, click on Notes

Click on <u>Add New Misc. Notes Record</u>

(For more information on Miscellaneous Notes see Section F)

a. Enter in the Admit Info note – enter this note only if appropriate.

(For more information on the Admit Info Note see Section F.)

Finish

11. Left hand menu bar, click on Activity List.

All the entries listed on the Activity List need to have a Status of Completed. If one entry does not then click on the <u>Details</u> hyperlink next to the module that is In Progress. A box opens up with the items that need to be entered. Go back to the module and see that all those boxes are filled in. This is a Federal requirement to have all of the yellow boxes in ISmart filled in. If you cannot get all the yellow boxes entered (due to assessment not being completed, etc.) then contact the Data Department for further instructions.

12. Once you are completely finished with your Assessment, notify your supervisor that your assessment is completed and is ready for review.