ISmart TAP Assessment

After it has been determined that you will do a TAP Assessment, following the guidelines on the Assessment Time Line Definition sheet in section C.2 of your manual, here is how you enter a TAP 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 yellow hyperlink

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

6. Left Hand menu click on Assessments
   a. Left Hand menu click on TAP
   b. Click on Add New Intake TAP yellow hyperlink
      (For more information on the TAP, please see Appendix B.)
   c. *Client Profile screen*- enter info
      Save
      Next

d. *Withdrawal screen*– enter info
Save
Next

e. *Medical screen* – enter info
Save
Next

f. *Co-occurring screen* – enter info
Save
Next

g. *Motivation screen* – enter info
Save
Next

h. *Drug Alcohol Use screen* – enter info.
Save
Next

i. *Support System/Employment screen* – enter info.
Save
Next

j. *Support System/Social screen* – enter info.
Save
Next

k. *Support System/Legal screen* – enter info.
Save
Next

l. *ASAM screen* – enter info. (For more information on the ASAM, please see Appendix A.)
Save
Next

m. *Summary screen* – enter info.
Save

n. Left Hand menu bar, click on *Diagnosis* – enter info. (For more information on Diagnosis, please see Appendix A.)
Save

7. Left Hand menu bar, click on Activity List.
From the Activity List click on Review of Placement Screening.
(For more information on the Crisis/Placement Screening, please see Appendix B.)

a. *Profile screen* – enter in the yellow boxes that were not part of the TAP.
Next

b. *Financial Info screen* – fill in any yellow boxes that were not populated with the TAP.
Next

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

d. *Substance Abuse screen* – fill in the rest of the boxes that were not populated with the TAP.
Next

e. *Legal History screen* – fill in the rest of the boxes that were not populated with the TAP.
Next

f. *ASAM screen* – this screen should be completely filled in from TAP, if it is not then please do that.
Save

g. Left hand menu bar, click on *Diagnosis*. Make sure this screen has at least one diagnosis entered.
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.
   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 Miscellaneous Notes Record</u>
    (For more information on Miscellaneous Notes see section F.)
    a. Enter in the Admit Info note – enter info.
       (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.