



Alabama Substance Abuse Information System Provider Training Manual

Revised 4/15/2011

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ASAIS Basics

Welcome to the Alabama Substance Abuse Information System (ASAIS).

The ASAIS application **only works using Internet Explorer**. Your PC may need to be configured by your IT department to allow ASAIS and all its functionality to work properly.

The ASAIS application knows who you are based upon your assigned User ID. What you can see and do in ASAIS is determined by a pre-determined security level: your view of ASAIS screens may differ from those shown in this manual.

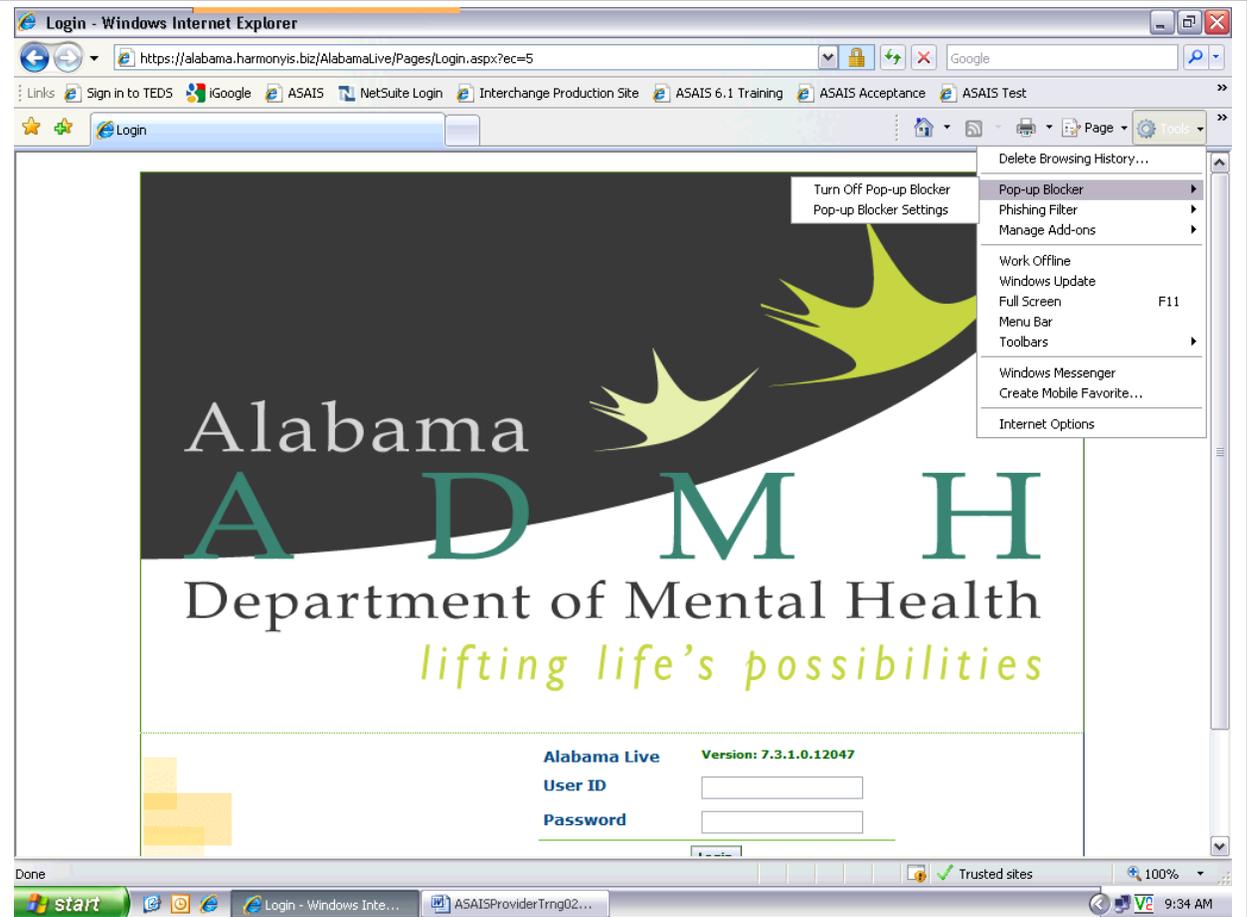
Any issues that you encounter during your use of ASAIS should be reported to your group's system administrator or IT department.



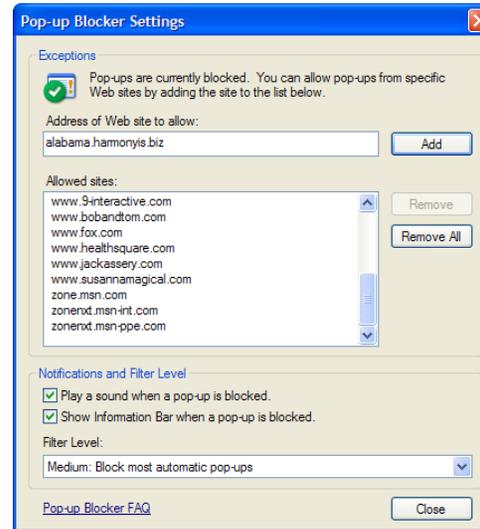
Pop-Up Blockers

The AS AIS application uses pop-up windows to present information to users. It is important to set up your Internet Explorer to allow these.

1. Go to the Tools menu in Internet Explorer
2. Mouse over “Pop-up Blocker”
3. Select “Pop-up Blocker Settings”



4. In the *Address of Web site to allow* field, type alabama.harmonyis.biz
5. Click the *Add* button.
6. Click the *Close* button.



If you use any other type of pop-up blocker (Yahoo, Google, etc.), follow their instructions to permit the alabama.harmonyis.biz site to use pop-up windows.

ASAIS Sign In Page

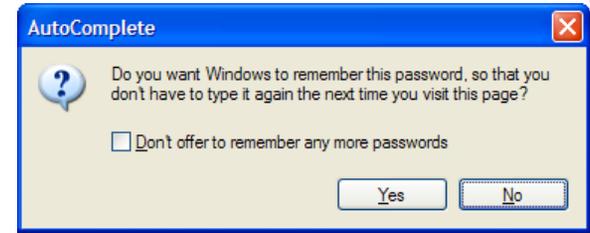
Signing In To ASAIS – For Training



CAUTION

The first time you log in to ASAIS, you may receive the following message:

It is important that you respond “No” to this message. Otherwise, it is possible that an unauthorized person could access ASAIS and view confidential information by simply guessing your User ID.



1. Open your Internet Explorer
2. Type the address to the right to navigate to ASAIS. (*This is the URL for Training purposes.*)
3. Sign on with *Username* and *Password* that your trainer has provided to you. (password is same as username). (Passwords are case sensitive, User ID's are not.)
4. Click on the *Login* button (or press Enter).
5. Press F11 on keyboard to clear Explorer menus

<https://demo.harmonyis.biz/AlabamaTraining/>

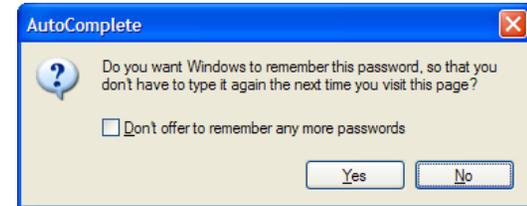


Signing In To AS AIS – in the Live (Production) Environment



CAUTION

The first time you log in to AS AIS, you may receive the following message: **It is important that you respond “No” to this message.** Otherwise, it is possible that an unauthorized person could access AS AIS and view confidential information by simply guessing your User ID.



1. Open your Internet Explorer
2. Type the address to the right to navigate to AS AIS. (*This is the URL for LIVE.*)
3. Sign on with *Username* and *Password* that has been sent to you from a System Administrator for AS AIS. (Passwords are case sensitive, User ID's are not.) You must complete training and a user account request form in order to receive the log on information.
4. Click on the *Login* button (or press Enter).
5. AS AIS may force you to change your password at this point. Instructions on what needs to be in a password are in the information from the System Administrator.

<https://alabama.harmonyis.biz/AlabamaLive>



Changing Your Password

1. Click on the *Change Your Password* link.
2. Enter your *User Name* (User ID), *Old Password*, and *New Password*.
3. Click on the *Update Password* button. ASAIS will tell you that your password has been changed.
4. Click *OK*.
5. Sign in with your new password.

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Department of Mental Health
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Alabama Live Version: 7.3.1.0.12047

User ID

Old Password

New Password

Confirm New Password

Note: Each ASAIS user must have his or her own logon (user name and password). The system tracks who enters/edits information. Be sure that you are logged on as yourself and not using someone else's user name. If your agency needs more users, please contact the Substance Abuse Services Division to set this up.

My ASAIS Page

Navigating the My ASAIS Page

The screenshot shows the My ASAIS interface with the following elements and callouts:

- 1:** Change Role dropdown menu (currently set to SA Clinical) and Go button.
- 2:** My ASAIS button.
- 3:** Quick Search input field and Participating checkbox.
- 4:** File - Print menu.
- 5:** Clients, Providers, Screenings, Reports buttons and Sign Out button.
- 6:** Complete status in the Clients table.
- 7:** Add a New Claim button in the My Claims section.
- 8:** Facilities in the Providers table.

Clients	Providers	Tasks
<input type="checkbox"/> Notes	<input type="checkbox"/> Facility Management	<input type="checkbox"/> My Claims
2 Complete	7 Facilities	Bulk Void and Replace
<input type="checkbox"/> Ticklers		My Claims
4301 Ticklers		Add a New Claim
		<input type="checkbox"/> My Files
		Download
		HaPI Upload
		Upload
		<input type="checkbox"/> My Management
		SA Wait List
		Event Ticklers

<p>The Main Menu screen in <i>ASAIS</i> is called My ASAIS. The My ASAIS screen presents links to all-important elements of your personal <i>ASAIS</i> usage. The <i>My ASAIS</i> link located at the top of the left-hand menu is always available, allowing you to quickly return to the My ASAIS screen. Your screen may look slightly different depending on your access level.</p>	
1. Role	Displays the role under which you are currently viewing ASAIS.
2. My ASAIS	Clicking on My ASAIS at any time will bring you back to this page. Clicking on My ASAIS will also refresh the data listed on the page.
3. Search	Use the Quick Search to find Clients or Claims.
	<ul style="list-style-type: none"> You can search for clients by ASAIS ID, Last Name, SSN, DOB, or Medicaid ID.
	<ul style="list-style-type: none"> Screenings can be searched for by Agency or Consumer Name (Last Name, First Name).
	<ul style="list-style-type: none"> ASAIS will return a list of all possible matches. Open the desired record by clicking on it in the list. If there is only one match, ASAIS will take you directly to that record.
	<ul style="list-style-type: none"> You may also enter just the first few letters of a Client.
	<ul style="list-style-type: none"> Use Advanced Search to find clients with a more common name. Use the filter to enter Last Name, First Name or other additional fields to narrow down the selection.
4. ASAIS Menu Bar	The ASAIS Menu Bar contains various tools that allow you to perform many tasks, such as adding new records, editing records, or printing a Report. The tools that are available depend upon which page the user is currently viewing.
5. Chapters	Chapters are links to different areas of ASAIS. The Chapters that a User may see and access are dependent upon their assigned security level.
6. Clients	The Clients section in My ASAIS provides quick links to information concerning clients and tasks assigned to the User. Each section has sub-sections.
7. Tasks	The Tasks section provides quick links to tasks and reports. The sections are described below:
<ul style="list-style-type: none"> My Management 	My Management provides access to the following information:

	<ul style="list-style-type: none"> • SA Wait List – used to review and act on clients assigned to the SA Wait List
	<ul style="list-style-type: none"> • Event Ticklers – displays a list, by client, of all incomplete ticklers
<ul style="list-style-type: none"> • My Claims 	You may have access to My Claims if your role requires it.
	<ul style="list-style-type: none"> • Bulk Void and Replace – Allows a user in SA Finance role to void and replace claims in bulk
	<ul style="list-style-type: none"> • My Claims – opens a batch entry claims screen
	<ul style="list-style-type: none"> • Add a New Claim – opens an add new claims screen
<ul style="list-style-type: none"> • My Files 	You may have access to My Files if your role requires it. My Files provides links to file import and export tools:
	<ul style="list-style-type: none"> • HaPI Upload – Link to upload clinical EDI files
	<ul style="list-style-type: none"> • Upload – Link to upload 837 claim files
	<ul style="list-style-type: none"> • Download – Link to download 997 and 835 response files
8. Providers	The Providers section gives you easy access to Facility Management. Clicking on this will show all facilities and their current capacity and enrollment levels.
Signing Out	
Sign Out	You may log out at any time by selecting Sign Out . It is important that you use the Sign Out link versus the Internet Explorer controls to ensure that information is properly saved before exiting.

List Views and Search Filters

List View Screens

In various areas of ASAIS, records may appear on a List View screen. The List View screens limit the number of records returned at one time.

List View screens allow a user to quickly review a list to retrieve the desired record. If the desired record does not appear on the initial list view, users can click on one of the following buttons to scroll through the records:



– This button will call the list view containing the first record.



– This button will call the previous list view.



– This button will call the next list view.



– This button will call the list view containing the last record.

Users can also modify the number of records returned in the list view by entering the desired number in the “Retrieve [] records at a time” field and clicking on one of the record search buttons (i.e., First, Previous, Next, Last).

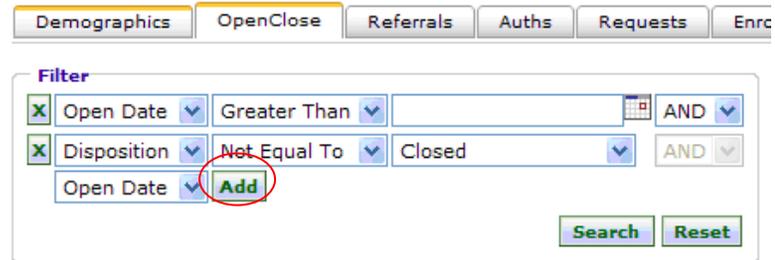
Tip

By clicking the column header (green header) in a list view, you can sort the records in ascending order. By clicking the column header a second time, you can sort the records in descending order.

Search Filters

Several List View screens allow users to search using multiple filters of their choosing.

Users can add additional filters by selecting the desired parameter from the bottom dropdown list and then clicking on the Add button.



The screenshot shows a search filter interface with a header bar containing tabs: Demographics, OpenClose, Referrals, Auths, Requests, and Enrc. Below the tabs is a 'Filter' section with a title 'Filter'. It contains three filter rows, each with a checkbox, a parameter dropdown, a comparison operator dropdown, a value dropdown, and a Boolean logic dropdown. The first row has 'Open Date', 'Greater Than', and 'AND'. The second row has 'Disposition', 'Not Equal To', and 'AND'. The third row has 'Open Date' and an 'Add' button circled in red. At the bottom right are 'Search' and 'Reset' buttons.

Each of these filters allow the user to select from the following comparison search criteria:

- Equal To
- Begins With
- Ends With
- Not Equal To
- Greater Than
- Less Than

In addition, users can search on these filters using Boolean logic (AND or OR).

To remove a filter, click the  to the left of the filter criteria.

Miscellaneous ASAIS Features

Date Fields

Wherever a date field appears in ASAIS, users have 2 options:

1. Click on the text box and enter the date (simply type the numbers – *mmddyyyy* - ASAIS will format the date with /'s) You must use all 4 digits to enter a year.

Open Date 

OR

2. Click on the calendar icon. Use the arrows to navigate through the calendar. Then click on the desired date to select it. (The current date is always highlighted in red.)



Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Today is Sat, 27 Jan 2007

Workflow Wizards

Throughout **AS AIS**, Workflow Wizards (WFW's) are initiated by specific events to guide you through the tasks required at that time. Specific actions, screens (e.g., Enrollments, Diagnosis, etc.), and assessments (data collection forms like SA Profile) may be presented to you for completion.

Users can open a task in the list by clicking on its link or by using the fly-out menu.

Once a task is completed, it is struck off the list.

If the items are not completed at that time, Ticklers are created to remind users that the tasks remain outstanding.

The screenshot displays the AS AIS Workflow Wizards interface. On the left, a sidebar lists tasks under the heading "Assessment Completed":

- Review Existing Enrollments
- Add Initial Enrollment with Facility** (highlighted in blue)
- Add Diagnosis Record
- Review Client's Demographics Record

A fly-out menu is open for the highlighted task, showing the following options: Open, Cancel, Edit, and Reassign. The main content area shows a form for "SA" with the following fields:

- Provider *
- Facility
- Capacity
- Facility Disposition
- Facility Status
- Disposition * (set to Open)
- Primary Worker * (set to SUDS, Legacy)
- Enroll Date (set to 12/4/2008)
- Comments

Ticklers can be accessed in the following locations:

My ASAIS page

The screenshot shows three main navigation sections: Clients, Providers, and Tasks. Under Clients, there is a 'Notes' link and a 'Ticklers' link which is circled in red. Below 'Ticklers' is a sub-link for '4301 Ticklers'. Under Providers, there is a 'Facility Management' link and a 'Facilities' link. Under Tasks, there is a 'My Claims' link with sub-links for 'Bulk Void and Replace', 'My Claims', and 'Add a New Claim'. Below that is 'My Files' with sub-links for 'Download', 'HaPI Upload', and 'Upload'. At the bottom is 'My Management' with sub-links for 'SA Wait List' and 'Event Ticklers', which is circled in red.

• **Clients>Ticklers –**

Clicking on the link...

The screenshot shows a user interface with a 'Change Role' dropdown menu set to 'SA Clinical' and a 'Go' button. Below this is a 'My ASAIS' button. A 'Quick Search' section includes a search input field, a 'Participating' checkbox, and a 'Clients' dropdown menu with a 'Go' button. Below the search section are buttons for 'Last Name', 'Advanced Search', 'Clients', 'Providers', 'Screenings', and 'Reports', followed by a 'Sign Out' button. On the right side, there is a 'Welcome, C.A.P. Assessment' banner and a 'File - Print' link. Below the banner is a navigation menu with 'Clients', 'Providers', and 'Tasks' sections. Under 'Clients', there is a 'Notes' link and a 'Ticklers' link which is circled in red. Below 'Ticklers' are sub-links for '5 Complete', '1 Pending', '364 Ticklers', and 'Episode List'. Under 'Providers', there is a 'Facility Management' link and a 'Facilities' link. Under 'Tasks', there is a 'My Claims' link.

...opens a list of the worker's pending or overdue ticklers.

The Filter works like all other filters in the ASAIS and may be used to narrow down the list of ticklers by:

- Status
- Tickler Name
- Date created
- Last Name (*used in the example*)
- First Name
- Date Due
- Date Completed

This feature allows flexibility for the user and the ability to focus on the most critical ticklers.

3 Ticklers record(s) returned - now viewing 1 through 3

Consumer Name	Tickler Name	Date Created	Date Due	Date Completed	Status
Testhh, Sidney	Add or Update SA Client Profile	09/22/2008	09/22/2008		New
Testhh, Brenda	Update SA Client Profile	09/24/2008	09/24/2008		New
Testhh, Sidney	Review Existing Enrollments	12/02/2008	12/02/2008		New

- **Tasks>My Management>Event Ticklers** - provides a list of incomplete tasks or ticklers by client; clicking on a client's name open a list of their ticklers; each task can then be reviewed or acted upon by clicking upon its link. This is especially useful for supervisors.

3 Ticklers Due record(s) returned - now viewing 1 through 3

Worker	Number of Ticklers
Caldwell, Cassandra	2
London, Kendra	5
Mitchel, Hilary	28

- **Client's record > Ticklers –**

Click on the Ticklers link in the client's record,

Sidney Testhh

File - Spell check - Add Enrollments - Print

Ticklers

View Inquiries

Last Name **Testhh** Status
 First Name **Sidney** Medicaid ID
 ASAIS ID **274435** SSN
 Middle Name

Demographics Episode **Enrollments** Profiles and Discharge Summary
 Placements Diagnosis Notes Medications Payers Eligibility

Filter
 Enroll Date Greater Than 1/1/2000 AND
 Provider Add

and you will get a list of ticklers just for this client.

Ticklers

Sidney Testhh 12/4/2008 12:25 PM

File - Spell check - - Print - Close Ticklers

Filter
 Status Equal To New AND
 Due Date Add
 Apply Alert Days Before Due
 Search Reset

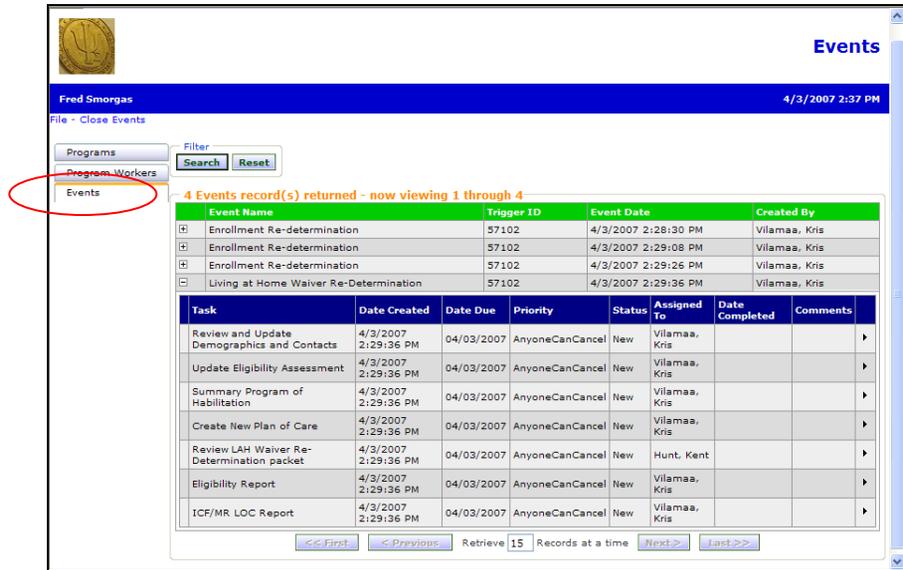
2 Ticklers record(s) returned - now viewing 1 through 2

Assigned To	Due Date	Review	Status
Assessment, C.A.P.	09/22/2008	Add or Update SA Client Profile	New
Assessment, C.A.P.	12/02/2008	Review Existing Enrollments	New

<< First < Previous Retrieve 15 Records at a time Next >> Last >>

To re-open a wizard:

1. Go to the event that prompted it (i.e. Enrollments tab then the Events button on the left) and open the record.
2. Click on the + sign to the left of the event to view the individual tasks.
3. Clicking on an item will re-open the WFW with the outstanding tasks.



ASAIS Provider Work Flow

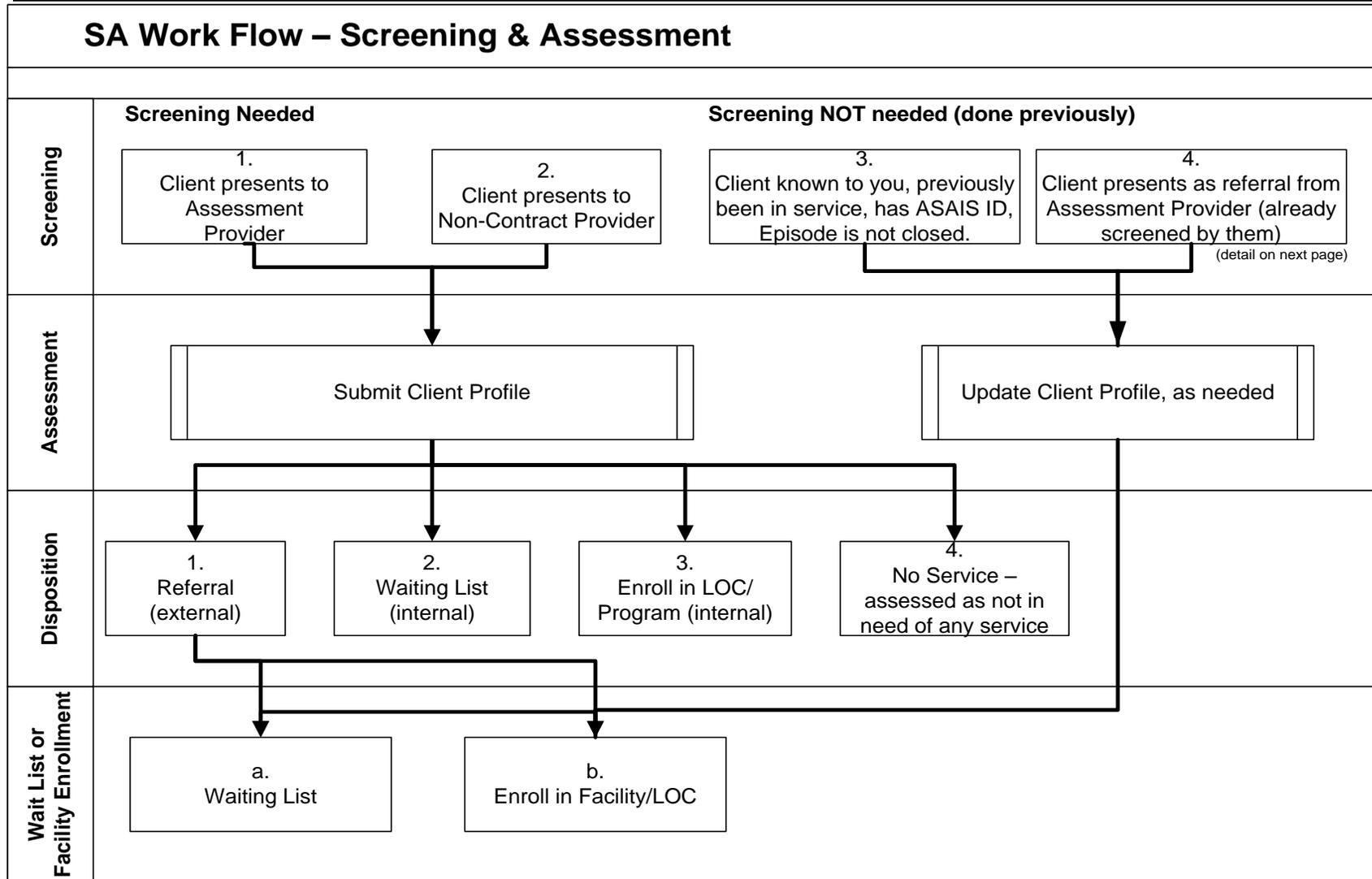
The ASAIS Provider workflow includes screenings, client profiles, enrollments, waiting list and discharge summaries. The following describes the workflow and related processes. There is a graphic workflow as well as decision tree questions to clarify the processes. Definitions for all disposition options are listed as well as a description of the Facility Management tab under Providers. There is additional information on the SA Wait List functions in a later section of this manual.

If you are submitting data for Screenings, Client Profile and Discharges via HaPi (EDI) from your agency's information system, please follow the same parameters for when data needs to be captured and submitted. *SA Wait List and Enrollment/Facility management may not be performed via EDI.*

- ASAIS Flowchart
- Screenings
- Client Profiles & Diagnosis
- Dispositions
- SA Wait List
- Enrollments
- Internal Facility Management
- Discharge Summary
- Decision Tree

Substance Abuse Work Flow

The following workflow shows the various options for the enrollment process including the waiting list.



5/16/08 rev.

Screenings: (when, who)

Screenings should be submitted the first time a client presents for service. A Screening captures identifying information so that SASD can establish the client in AS AIS, assign an AS AIS unique ID number and/or create an enrollment to create a relationship to the screening provider. Screening includes a brief screening tool of 6 questions (one for adults and one for clients under 18). The screening tool is capturing information at a point in time. It is not dictating any clinical recommendation/approval or denial of service. If a screening has already been done by another provider (you already have an AS AIS ID number), you do not need to do another one.

1. If this is a client already known to you, returning to service, already has an AS AIS ID and has an open AS AIS episode – you should **NOT** do another screening.
2. If the client is coming to you as a referral from another DMH contract provider, you should **NOT** do a screening as the Assessment provider has already done one and should refer the client to you in the system.
3. If you are attempting to update demographic information (Name, DOB or SSN), you should **NOT** do a screening.

Decision Process for Screening – questions to ask/consider when a client presents for service

1. Is this client known to your agency?
 - a. If yes, no screening is required. You have the AS AIS ID # and access to the client's record.
 - b. If no, a screening may be required. Go to question c.
 - c. Did the client come as a referral from another contract provider?
 - i. If yes, then the screening and profile should already be done. When you accept the referral and open the client to your program, you will have access to the client's record. If you don't have a referral record in AS AIS, please contact the referring provider.
 - ii. If no, then a screening is necessary to get the AS AIS ID #, open the client in AS AIS and/or get access to their record. Submit a screening for this client.

SA Client Profile: (when to do it, assessments – update *, intake *)

1. A SA client profile needs to be submitted when you are the provider performing the assessment or if the client was assessed at a non-contract provider (who would not have had access to ASAIS and would not have done the profile).

Diagnosis –In ASAIS, the diagnosis MUST be entered via the Diagnosis tab in the client’s record and the status must be set to Complete. Every SA client (for whom you are going to bill for SA services) must have at least one SA diagnosis under Axis I under the Diagnosis Detail in their ASAIS record. Diagnosis is tied to claims entry via the client’s record.

2. Any time that you do an Assessment or an Assessment Update (for which you are billing DMH), you need to complete a SA Client Profile. ASAIS provides a Copy from Previous or Duplicate Assessment function so that once an original Profile is entered, you may copy that document using one of these two functions, and make any changes in the data. Save and close the assessment. Be sure that the Status is set to **Complete**. This will create a new SA Profile with updated information and keep the original as well.
3. If you are the receiving (client was referred to you via the waiting list) provider, you will need to save a complete profile to be able to bill for the client. You may be able to use **Copy from Previous**, otherwise, submit the information as if new.

Disposition: (definitions below)

Once you have done an assessment or received a referral, you will make a determination of if and where to enroll this client.

1. Refer to an external agency (another contract provider who provides the needed level of care (LOC).
2. Place the client on one or more of your own waiting lists in anticipation of an opening.
3. Enroll (open) the client to the needed level of care (facility) at your own agency.
4. Determine that no service is needed at this time – no further data or documentation is required.

SA Wait List:

Please see the separate section on the SA Wait List for referrals to, accepting a client onto, denying a client to or enrolling a client from the Wait List. (begins on page 73)

Enrollments:

1. SASD (during the screening process) will have established an Enrollment record for the assessment information with the disposition of “Assessment”.
2. If you are enrolling the client into one of your programs (facility/level of care) you will update the existing Enrollment record so that there will be just one enrollment record for this client for your organization. The previously created enrollment record for the Assessment will be changed to a disposition of Open and a facility/LOC record will be added.
 - a. The “open” record covers all facility enrollments until they are discharged from the provider. The system will not allow you to have multiple enrollment records for the same provider in the same timeframe.
 - b. You can have two open facility records at once (e.g., methadone and IOP) or any other allowable combination.
 - c. You may have multiple facility (LOC) records for a client over time as they transfer from one LOC to another within your organization. Usually, only one Facility record will have a disposition of “Open” unless the situation in b above is present.
3. Enrollments at the Agency level should only have one of four dispositions:
 - a. Assessment – an assessment was performed, but not further services were provided at this agency
 - b. Open – additional services are being provided (including interim services while waiting)
 - c. Waiting List – client is receiving no services and only on your waiting list
 - d. Discharged – client is no longer in service with the agency

NOTE: The dispositions of “Referred”, “Not Accepted” and “Transferred” should not be used at the agency level.

4. Under the Agency Enrollment record, there is Facility Enrollment. These are the levels of care (LOC) that you provide and where you provide them. You can manage a client's disposition and facility enrollment via the Provider/Facility Management tab. A client must be enrolled in a facility to receive any service other than an Assessment (including an assessment update). If the client only has an Assessment record in Enrollments, claims for other services will be automatically denied by the system. As you manage the wait lists for your facilities, facility enrollments will be created. For clients not on a wait list who are directly enrolled into a provider and facility, you must add the facility enrollment manually.
5. Facility Enrollment Dispositions: (definitions)
 - a. Referred – this client has been referred to this facility waiting list
 - b. Waiting List – this client has been accepted onto this facility waiting list
 - c. Not Accepted – this client was referred but not accepted onto this facility wait list
 - d. No Contact – this client was on the waiting list, but could no longer be contacted for service
 - e. Open – this client has been opened (enrolled) to this facility program/level of care
 - f. Transferred – this client has been transferred from one program/facility to another one in the same provider
 - g. Cancelled – this is not a selection to the user but is the value that shows once the client who had been referred to this facility's waiting list has been accepted (opened/enrolled) into another provider's program/facility.
 - h. Closed – What displays when you discharge the client from the agency.

Facility Management Within Your Agency: (tab in Providers Chapter)

If you click on the Provider chapter button and then the Facility Management tab, you can view, filter, and sort all clients under all Disposition categories in all of your facilities. You should manage referrals in from this grid. You should not complete discharges from this grid. The grid provides an overview of who, how many, what disposition in all facilities.

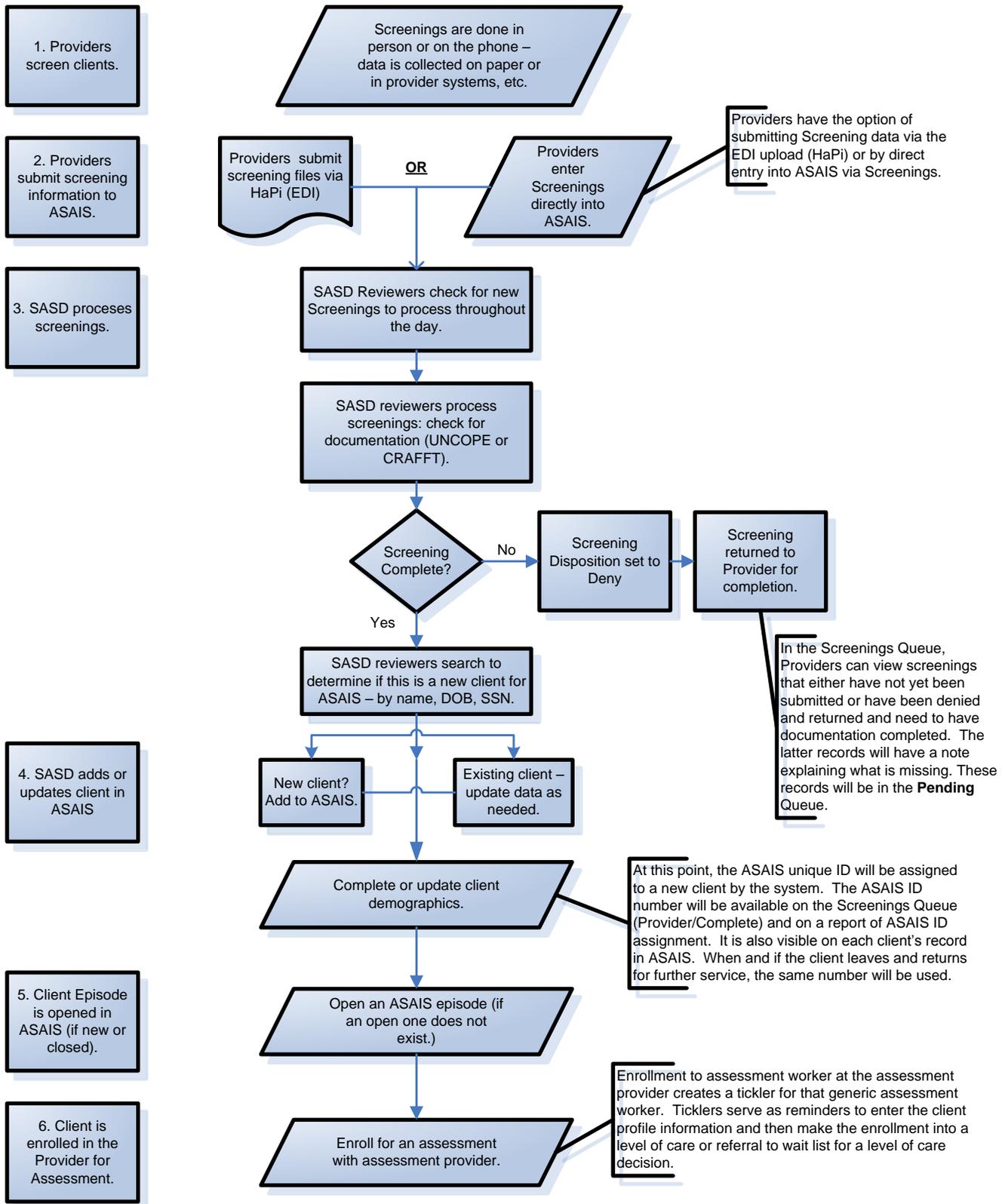
1. Transfers – if a client is moved from one of your facilities to another due to change in level of care needed or change in location (if you have two facilities that offer the same level of care), the facility enrollment record should reflect the
-

“transfer”. Using the existing facility record, change the disposition of “Open” to “Transferred”. Save the record. Then, in the client record, go to the Enrollments tab, click on the Open enrollment and Add Facility Enrollment to create the “Open” record for the new facility/LOC to which the client has been transferred. Save this record.

Discharge Summary:

1. A Discharge Summary is required before the Provider enrollment (beyond assessment) has a disposition changed to discharged (not transferred). Go to the “Profiles and Discharge Summaries” tab in the client record. Click “Add a Profile or Discharge Summary”. Fill in the form. Set status to Complete. Save the Record.
2. Then you will have a WFW item for Discharge Diagnosis. Click on this item and a blank diagnosis record will open. Select Discharge for the disposition. Set the Status to Complete. Select the appropriate Axis I, Diagnosis I Substance Abuse diagnosis (at a minimum). Save the Diagnosis Detail.
3. You will then receive a Workflow Wizard (WFW) item that will prompt you to Discharge the agency enrollment. Click on the Open agency enrollment. Change the disposition to “Discharged”. Enter a Discharge Date. Save. Close the WFW.

Screening, Episodes and Initial Enrollments in ASAIS



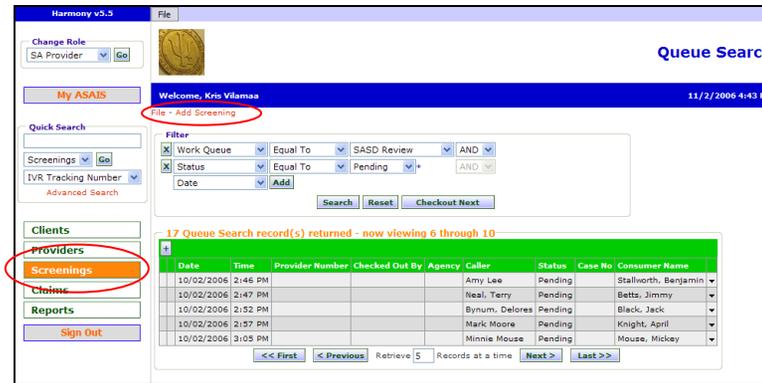
November 15, 2007

Screenings

Submitting a New Client for Screening in the Screenings Chapter

Adding a New Screening

1. Click on the *Screenings* chapter button.
2. The *Screening Queue Search* screen will appear
3. Click *Add Screening* from the *File* menu bar.



4. The *Add Screening* page will appear
5. Record information regarding the client in the appropriate fields. (Field labels marked by a red asterisk are required.)
6. Enter information regarding the client in the appropriate fields. The Work Queue will default to *Provider*.
7. Click “Search for Consumer” to perform a quick search based on the name, DOB and SSN you entered. If there is an exact match in the system, the ASAIS ID field will be populated. You still must complete the rest of the process, regardless of whether an ID is returned or not.
8. *Client Start Date* field – **pay close attention to the date that you enter here.** You will not be able to bill for services prior to the date entered. The client’s Episode Opening date will be set to the same date as the one that is entered.

Welcome, Aletheia House Assessment

File - Spell Check - Save Screening - Save and Close Screening - Search for Consumer - Print

Tools - -

Inquiry

Entry Date * 02/04/2010

Entry Time * 10:26 AM

Provider * Assessment, Aletheia

Date of Entry * 02/04/2010

Screening Source Provider Entry

Request Type * Client Screening

Denial Reason

Disposition * Open *

Work Queue Provider

Status * Pending

ASAIS ID Find

Client Start Date * 2/4/2010

Last Name *

First Name *

DOB *

SSN *

Street *

Street2

City *

State Alabama

Zip Code *

9. Select *Save Screening* from the *File* menu. (DO NOT use *Save and Close* at this point, you will save the record but may forget to submit the screening.)
10. Click on 'OK' in *The Save was Successful* message box.

Filling Out the Screening Documentation

1. After saving the record, a WFW will open, prompting the user to complete required Documentation.
2. The user will see two ticklers for Screening Questions:
 - a. SA CRAFFT for clients less than 18 years old
 - b. SA UNCOPE for clients age 18 and above.

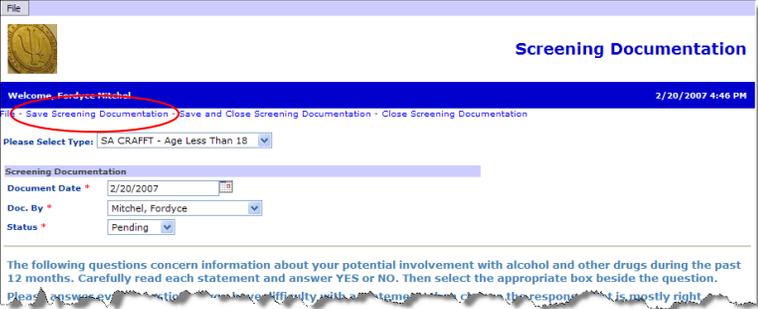
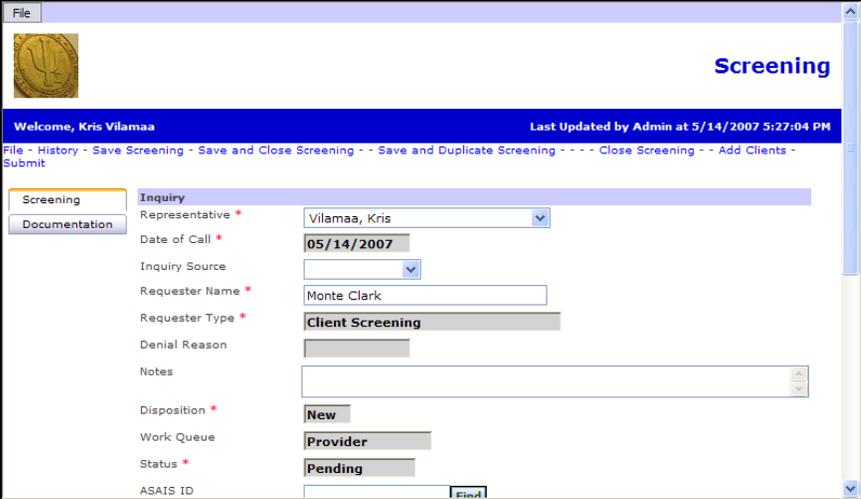
Be sure to select the correct tickler for the age of this client.

3. Fill out the appropriate information in the header and then in the form (*Yes* or *No*).
4. Cancel the tickler for the other screening tool.

The screenshot shows the 'Screening Documentation' form. At the top, there's a 'Workflow Wizard' window with a 'File' menu. A dropdown menu for 'Add documentation' is open, showing two options: 'For Ages 18 and Above SA UNCOPE' (selected) and 'SA CRAFFT - Under Age 18 SA CRAFFT - Under Age 18'. The main form has a header with 'Screening ID = 54272' and '2/4/2010 2:10 PM'. Below the header, there's a 'Please Select Type:' dropdown set to 'SA UNCOPE - Age 18'. The 'Screening Documentation' section has fields for 'Document Date' (2/4/2010), 'Doc. By' (Assessment, Aletheia House), and 'Status' (Pending). Below these are five screening questions (U, N, C, D, E) with dropdown menus for 'Yes' or 'No'. A 'Compute' button is at the bottom right.

5. Click on the *Compute* button on the bottom of the form to compute the potential client's score.

This is a close-up of the bottom of the form. It shows question 6: '6. Have you ever gotten into trouble while you are using alcohol or drugs?' with a dropdown menu. Below it is question 7: '7. CRAFFT Score:' with a text input field and a 'Compute' button circled in red.

<p>6. Ensure that the <i>Status</i> is 'Pending'.</p> <p>7. Select <i>Save Screening Documentation</i> from the <i>File</i> menu.</p>	
<p>8. Select <i>Close My ASAIS</i> from the <i>File</i> menu.</p> <p>9. You will be returned to the <i>Screening Page</i>.</p> <p><i>If you need to review the screening documentation at any time, click on the Documentation button under the Screening button on the left side of the screen.</i></p>	

10. Select *Submit* from the *File* menu.

This sends the screening to the SASD Review Queue where the SASD Central Office staff can review and approve it. (You will notice that the *Work Queue* field changes from Provider to SASD Review after you click on Submit.)

11. Click on *Close Screening*.

You have now finished submitting a screening to SASD.

The screenshot shows the 'Screening' application interface. At the top, there is a menu bar with 'File', 'History', 'Save Screening', 'Save and Close Screening', 'Save and Duplicate Screening', 'Close Screening', 'Add Clients', and 'Submit'. The 'Submit' button is circled in red. Below the menu bar, there is a header area with 'Welcome, Kris Vilamaa' and 'Last Updated by Admin at 4/7/2007 6:11:32 PM'. The main form area has a left sidebar with 'Screening' and 'Documentation' tabs. The 'Inquiry' section contains several fields: Representative (Vilamaa, Kris), Date of Call (04/07/2007), Inquiry Source (Telephone), Requester Name (John Moore), Requester Type (Client Screening), Denial Reason, Notes, Disposition (Submitted), Work Queue (SASD Review), Status (Pending), Case No., Last Name (Market), First Name (George), and DOB (04/02/1997). The 'Work Queue' dropdown is circled in red.

Understanding the Screening Work Queues and Statuses

- In Screenings, *Work Queue* values are assigned after saving and submitting a screening.
- The value in the *Status* dropdown indicates whether the screening is still in process or not.
- The combination of the *Work Queue* and the *Status* will indicate a screening's current process status.

This screenshot is identical to the one above, showing the 'Screening' application interface. In this view, the 'Status' dropdown is circled in red, showing 'Pending' selected. The 'Work Queue' dropdown is also circled in red, showing 'SASD Review' selected.

Reviewing the Work Queue	
<ol style="list-style-type: none"> 1. Click on the <i>Screenings</i> chapter button. 2. The <i>Screening Queue Search</i> screen will appear 3. In the <i>Filter</i>, select the desired combination (see the list below). <i>You will want to add <u>Date</u> to your search to narrow down the records returned from the Search.</i> 4. Click on the <i>Search</i> button. 5. A list of <i>Screenings</i> matching the criteria will be returned. 	 <p>The screenshot shows a 'Filter' section with three rows of criteria: 'Work Queue' (dropdown), 'Equal To' (dropdown), 'Provider' (dropdown), and 'AND' (dropdown); 'Status' (dropdown), 'Equal To' (dropdown), 'Pending' (dropdown), and 'AND' (dropdown); and 'Date' (dropdown) with an 'Add' button next to it. Below the criteria are 'Search', 'Reset', and 'Checkout Next' buttons. A red circle highlights the 'Date' dropdown and the 'Add' button.</p>
Work Queue/Status Combinations:	
<ul style="list-style-type: none"> • If the <i>Work Queue</i> is 'Provider' and the <i>Status</i> is 'Pending': 	<p>The screening has not yet been submitted to the S.A. Division OR has been submitted back to you for additional information. This screening is still in your queue and will not be seen nor approved until you submit it to SASD.</p> <p><i>Check this queue at least once a week to be sure no records are in Pending status and need to be submitted to SASD.</i></p>
<ul style="list-style-type: none"> • If the <i>Work Queue</i> is 'Provider' and the <i>Status</i> is 'Complete': 	<p>The Division has approved the screening and sent it back to the Provider with ASAIS ID number.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>ASAIS ID <input type="text" value="233211"/> <input type="button" value="Find"/></p> <p>Last Name * <input type="text" value="Steward"/></p> <p>First Name * <input type="text" value="Chris"/></p> </div>
<ul style="list-style-type: none"> • If the <i>Work Queue</i> is 'SASD Review' and the <i>Status</i> is 'Pending': 	<p>The Provider has submitted the screening for review but it has not been processed yet by the S.A. Division.</p>

Screening Approval Process

Next Steps (done by SASD staff)

Connecting a Client to an Assessment Provider in ASAIS

Once a screening is submitted, SASD staff will go to Screenings and review each of the screenings that have been submitted. Documentation and its score will be reviewed. Documentation Status will be changed to *Complete*.

If the screening is approved, SASD staff will change the disposition to *Approved* and the Status to *Complete*. Staff will then add the new client to the ASAIS database and ensure that the client has an *Open* Episode of Care in the SA fund code. The new client will be enrolled in your Agency (Provider) with a Disposition of *Assessment* and an Enrollment Type of *Assessment*. The case will be assigned to your default worker, **Assessment, Agency**.

Withdrawing a Client

If a Provider or SASD staff decides to withdraw a screening, the Disposition of the Screening will be changed to *Withdrawn* and the Status to *Complete*.

Denial of a Screening

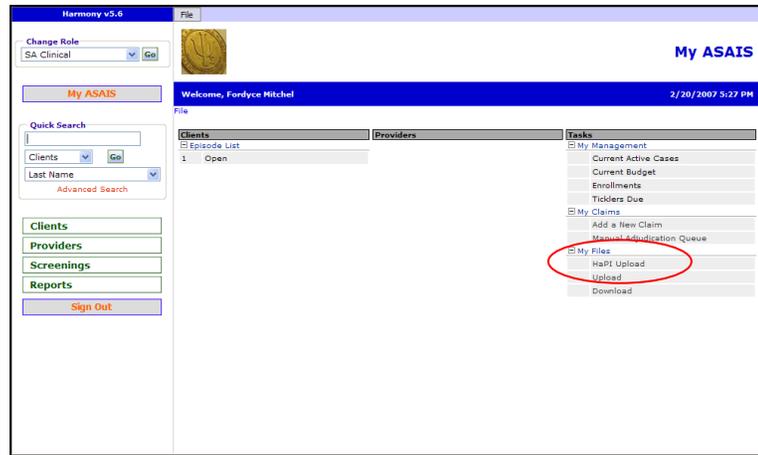
If SASD decides to deny a screening, they will change the Disposition of the Screening to *Denied* and the Status to *Pending*. They will then record a *Denial Reason* on the Screening page. These records usually require a response from the provider to get them approved.

Using the HaPI Upload

Submitting a New Client for Screening via the HaPI Upload

Adding New Screenings

1. On the *My ASAIS* page, navigate to the *HaPI Upload* link under *Tasks>My Files*.
2. Click on the *HaPI Upload* link.



3. The *ASAIS-API File upload* window will open.
4. Enter your email address in the *User Email* field.
5. In the *File Type* field, select *Inquiry*.

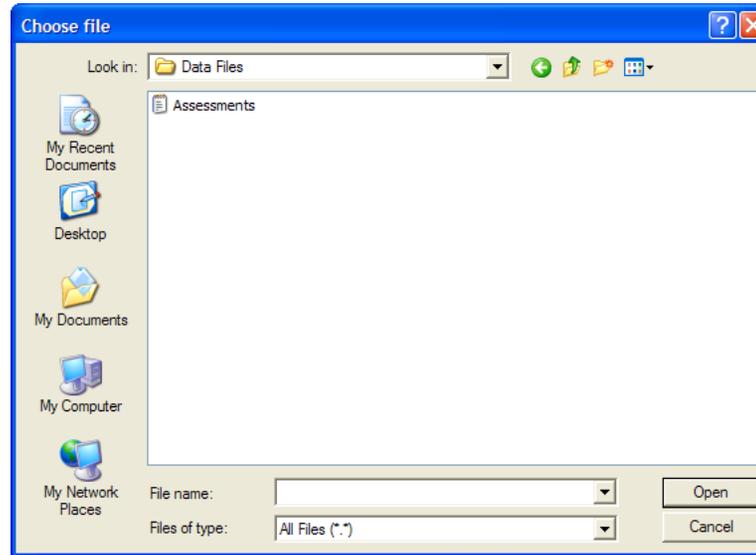
The screenshot shows the 'Harmony-API File upload' window. It has the following fields and buttons:

- User Email :** Kristopher.Vilamaa@mh.alabama.gov
- File Type :** Inquiry (dropdown menu)
- Select File :** C:\Documents and Settings\dmliller\My... (with a 'Browse...' button)
- Buttons:** Upload, Close

6. Click on the *Browse* button to locate the file you wish to upload.

Check with your System Administrator as to the standard location of the files on your computer or network.

7. After browsing to the desired file, click on the *Open* button.



8. Back in the HaPI Upload window, click on the *Upload* button.

9. Click on *OK* in the *File Submitted Successfully* message window.

10. SASD staff will then review and process the screening (see page 51 for details).

Client Assessment

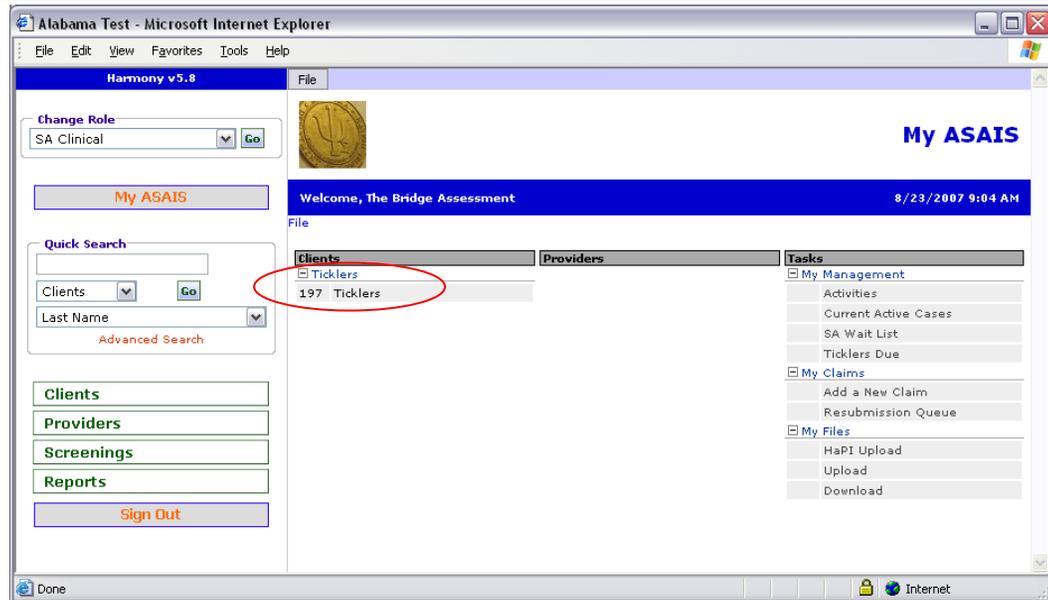
Completing Client Profile, Diagnosis and Enrollment

Once a client has been enrolled for an Assessment and the assessment has been performed, the following steps are taken:

Completing a SA Client Profile Form (Role: SA Clinical)

1. Click on the *Ticklers* list on the *My ASAIS* page.

Check for ticklers at least once a week, though if you have a large volume of screenings and assessments, you may wish to do this more often.



2. If you have a large number of ticklers, use the filter to narrow down the list. Add *Date Created* and *Greater Than* and enter an appropriate date to get a smaller list. Click on *Search*.
3. In the list, click on the tickler named *Add New SA Client Profile* for the desired client.
4. The *SA Client Profile* will open in a workflow wizard.

File - Spell check - Print - Close Ticklers

Filter

Status

Date Created

Apply Alert Days Before Due

5 Ticklers record(s) returned - now viewing 1 through 5

Consumer Name	Tickler Name	Date Created	Date Due	Date Completed	Status
S, K	Add Diagnosis Record	12/04/2008	12/04/2008		New ▶
S, K	Add Initial Enrollment with Facility	12/04/2008	12/04/2008		New ▶
S, K	Review Existing Enrollments	12/04/2008	12/04/2008		New ▶
Testhh, Sidney	Review Existing Enrollments	12/02/2008	12/02/2008		New ▶
Testhh, Bridget	Add New SA Client Profile	12/09/2008	12/09/2008		New ▶

<< First < Previous Retrieve 15 Records at a time Next > Last >>

5. Complete the form as required.
 - a. For *Review*, select 'Assessment' from the dropdown list.
 - b. Select the name of the worker who is completing the form in the *Entered By (worker)* dropdown list.
 - c. Enter the date that the form was completed in the *Review Date* field. (The date will default to the current date but can be changed if needed.)
 - d. Switch the *Status* to 'Complete.' (The *Status* will default to 'Draft.' This allows you to save a partially

https://alabama.harmonyis.biz - Harmony - Work Flow Wizard - Microsoft Internet Explorer

WorkFlow Wizard

SA Client Profile

Profile or Discharge

Bart Simpson 8/23/2007 9:13 AM

File - Save Profile or Discharge - Copy From Previous - Print - Close Profile or Discharge

Please Select Type: SA Client Profile

Consumer Assessments

Review * Assessment Entered By * Assessment, The Bridge Details

Review Date * 8/23/2007 Status * Draft

Fund Code * SA Provider * The Bridge Inc. Details

Approved By Approved Date

Reporting Type

Referral - Admission Information

Co-Dependant / Collateral:

Principal source of referral:*

Client Transaction Type: Admission

Specific Substance Abuse Problems

Primary Problem

Primary Substance Problem Type:* Alcohol

Done

completed form.) e. Select your agency in the <i>Provider</i> dropdown list.	
6. You may print the Profile form by selecting <i>Print</i> from the <i>File</i> menu. 7. When done, select <i>Save Profile or Discharge</i> from the <i>File</i> menu. 8. Click OK to <i>The Save was successful</i> message.	
Note: When the client is discharged from this provider, you will complete the Discharge Summary form.	

Alabama SASD Integrated Placement Assessment Cheat Sheet

<p>NOTE: When using the SASD Integrated Placement Assessment, you can find the necessary information to complete the profile in the following locations:</p>	<p>Dimension 1 – Substance Type, Substance Detail, Frequency, Route, Age of First Use, (Primary, Secondary and Tertiary) Dimension 2 – Pregnant Status Dimension 3 – Co-Occurring Disorders Dimension 5 – Self-Help Group Participation Dimension 6 – Living Arrangements, Employment Status, Education, # of Arrests in 30 days prior to admission Diagnosis – Diagnosis Detail Level of Care Placement Summary – Assessed LOC, Placed LOC, Reason for Difference Release of Information</p>
---	---

1. When you save the SA Profile, you will get another workflow wizard.

The screenshot displays a software interface titled "Workflow Wizard". At the top, there is a "File" menu. Below the menu, the text "Assessment Completed" is visible. A table of options is presented with three rows, each containing a link and a right-pointing arrow:

Make Changes to Enrollment If Receiving a Service Beyond Assessment	▶
Add Diagnosis Record	▶
Review Client's Demographics Record	▶

To the right of the table, the "harmony" logo is shown with the text "INFORMATION SYSTEMS, INC." below it. A blue banner contains the text "Welcome, Aletheia House Assessment". Below the banner, the text "File - Print - Close My ASAIS" is displayed.

Program Enrollment (Role: SA Clinical)

1. Click on *Make Changes to Enrollment*, if the client is receiving a service beyond assessment. **If not, cancel this tickler.**
2. This will present a grid of any existing Enrollments for your agency.
3. Click on the most recent (if there is more than one) Enrollment record with the status of Assessment (or in some cases Open).

Workflow Wizard

Assessment Completed

- Make Changes to Enrollment
- Add Diagnosis Record
- Review Client's Demographics Record

WALLACE Hassell

Filter

Enroll Date Greater Than 1/1/2000 AND

Provider Add

Search Reset

1 Enrollments record(s) returned - now viewing 1 through 1

Fund Code	Provider	Worker	Disposition	Enroll Date	Discharge Date	I.O.S.
SA	Test Provider	g, Mary	Open	08/03/2007		546

<< First < Previous Retrieve 15 Records at a time Next > Last >>

4. The Enrollment record will display the current disposition
In the example, this record shows an Assessment enrollment record.

Stella Testing

File - History - Spell check - Save Enrollments - Save and Close Enrollments - - - Print - Close Enrollments

Enrollments Fund Code * SA

Enrollment Workers Provider * Chemical Addictions Program Details

Facilities Disposition * Assessment

Events Enroll Date 12/12/2008

TrackDisposition Comments

5. Change the Disposition to *Open* by selecting Open from the drop down at Disposition.
6. Click on *Save Enrollments*. (**Don't use Save and Close Enrollments here** because you are now going to Add Facility from this same screen.)

Stella Testing

File - History - Spell check - **Save Enrollments** - Save and Close Enrollments - - - Print - Close Enrollments

Enrollments	Fund Code *	SA
Enrollment Workers	Provider *	Chemical Addictions Program Details
Facilities	Disposition *	Open
Events	Enroll Date	12/16/2008
TrackDisposition	Comments	

7. Now on the same page, click on *Facilities* to add the appropriate Facility/Level of Care for this client.
8. Click on *Add Facility*.

Stella Testing

File - **Add Facility** - Print - Close Facilities

Enrollments	Filter <input type="button" value="Search"/> <input type="button" value="Reset"/>
Enrollment Workers	
Facilities	
Events	
TrackDisposition	

0 record(s) returned

9. The Facility page will open.
10. Click on the drop down for Facility. All of your Provider's facilities will show. Select the correct one for this client

Stella Testing
File - Save Facility - Save and Close Facility - Print - Close Facility

Facility

Facility *

Capacity

Start Date * 12/17/2008

End Date

Status * **Pending**

Disposition Open

Disposition Date 12/17/2008

Level Of Care

11. The system will refresh and show the current capacity for this Facility (if it is designated in the Provider record).
12. The *Start Date* will default to today's date. Adjust the date if the client started the program before today.
13. *Save and Close Facility*.

Stella Testing
File - History - Save Facility - Save and Close Facility - - - Print - Close Facility

Beds Referred

Facility

Facility * C.A.P. Pegasus Center Adult IOP

Capacity **Total: 140, Used: 106**

Start Date * 12/16/2008

End Date

Status * **Pending**

Disposition Open

Disposition Date 12/17/2008

Level Of Care **Intensive Outpatient (IOP)**

14. Now the Enrollment record will show the Open Disposition.
15. Mouse over the arrow next to “Review Existing Enrollment” and “Cancel” the reminder
16. Continue with the next item for *Diagnosis*.

Workflow Wizard

Assessment Completed

- Make Changes to Enrollment
- Add Diagnosis Record
- Review Client's Demographics Record

WALLACE Hassell

File - Spell check - Print - Close Enrollments

Filter

Enroll Date Greater Than 1/1/2000 AND

Provider Add

Search Reset

1 Enrollments record(s) returned - now viewing 1 through 1

Fund Code	Provider	Worker	Disposition	Enroll Date	Discharge Date	LOS
SA	Test Provider	g, Mary	Open	08/03/2007		546

<< First < Previous Retrieve 15 Records at a time Next > Last >>

Completing a Diagnosis (Role: SA Clinical)

1. In the WFW, now click *Add Diagnosis*.
2. The *Diagnosis Detail* screen will appear.
3. Ensure *Review* is set to *Assessment* and *Fund Code* is set to *SA*.
4. The status defaults to *Pending*.
5. *Primary Diagnosis*, will default to *Axis 1, Diagnosis 1*. This will assure that the SA diagnosis is used in billing.

Workflow Wizard

Assessment Completed

- Make Changes to Enrollment
- Add Diagnosis Record
- Review Client's Demographics Record

WALLACE Hassell

1/30/2009 3:09 PM

File - Spell check - Save Diagnosis Detail - Print - Close Diagnosis Detail

Section 1

Review * Assessment

Review Date * 1/30/2009

Fund Code * SA

Provider Test Provider

Diagnosis By * Assessment, Test Provider

Status * Pending

Primary Diagnosis Axis I Diagnosis 1

Primary Diagnosis Code

Axis I

Diagnosis 1

Diagnosis 2

Diagnosis 3

Axis II

Diagnosis 1

Diagnosis 2

Diagnosis 3

Axis III

Diagnosis 1

Diagnosis 2

Diagnosis 3

Axis IV

Primary Support Group

6. Click the ellipsis button (⋮) at the end of the Axis I, Diagnosis 1 row to search for the diagnosis codes. Click on the codes in the returned search results to choose. *You must have at least one SA diagnosis code for each client.*
7. Change the Status to *Complete*.
8. Select *Save Diagnosis Detail* when finished.

The screenshot shows the 'Workflow Wizard' interface for a client named 'Bridget Testhh'. The left sidebar contains a navigation menu with the following items: 'Assessment Completed', 'Review Existing Enrollments', 'Add Initial Enrollment with Facility', 'Add Diagnosis Record', 'Review Client's Demographics Record', and 'Assessment Completed'. The main content area is titled 'Section 1' and contains the following fields: 'Review' (Assessment), 'Review Date' (12/9/2008), 'FundCode' (SA), 'Provider' (Chemical Addictions Program), 'Diagnosis By' (Assessment, C.A.P.), and 'Status' (Complete). Below these fields, there are sections for 'Axis I' and 'Axis II' diagnoses. The 'Axis I' section shows 'Diagnosis 1' as '[30390] Alcohol Dependence' with an ellipsis button (⋮) at the end of the row, which is circled in red. The 'Axis II' section shows 'Diagnosis 1' and 'Diagnosis 2' with empty text boxes and ellipsis buttons.

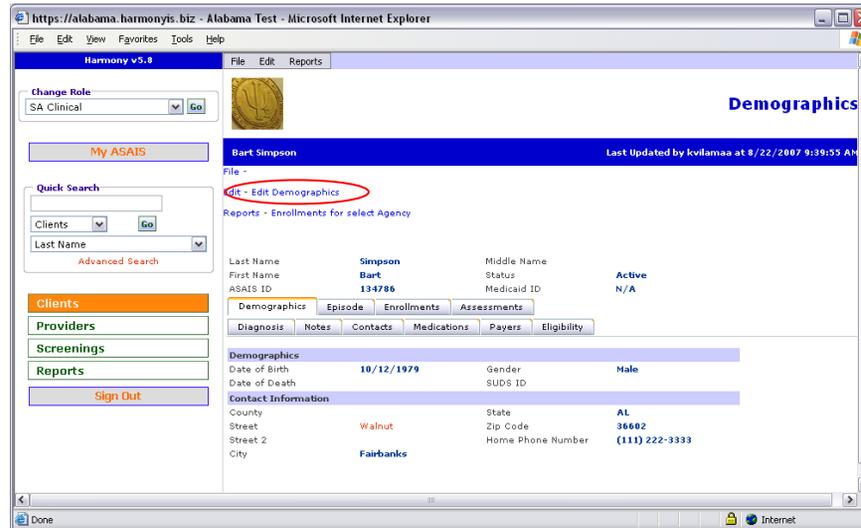
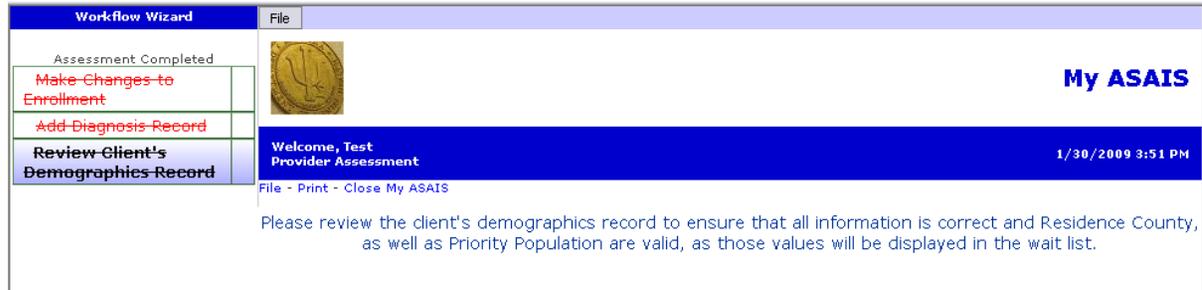
Review Client's Demographics Record (Role: SA Clinical)

1. Click on *Review Client's Demographics Record*. A message appears that reminds you to review this client's demographic record to assure that it is up to date and accurate.

It is particularly important to make sure that the client's *Priority Population* field has been completed in *Demographics*.

2. Click *Close My AS AIS*.

3. Navigate to the client's record.
4. Click *Edit Demographics*.



5. Update any changed or missing information and select the relevant *Priority Population*, if blank.
- Be sure that the *Address* is complete.
6. Select *Save and Close Demographics* when finished.

The screenshot shows a web browser window with the URL <https://alabama.harmonyis.biz>. The page title is "Demographics" and the user is logged in as "Bart Simpson". The "Save and Close Demographics" button is circled in red. The form contains the following information:

Basic Demographics	
Salutation	
Last Name *	Simpson
First Name *	Bart
Middle Name	
Alias	
DOB *	10/12/1979
Age	27.9
Date Of Death	
Gender *	Male
Marital Status	Single

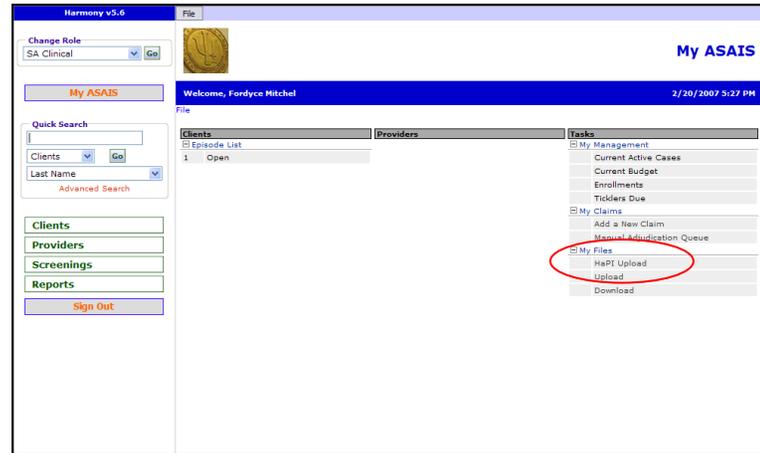
Contact Information	
Street	982 Blackstone Blvd
Street 2	
City	Montgomery
State	Alabama
Zip Code	36117
Home Phone Number	(334)089-0809
Work Phone	
Cell Phone	

Languages	
Ethnicity	Not Of Hispanic Orig
Primary Language	
Secondary Language	
Birth County	
Residence County	Montgomery *

Additional Information	
Priority Population	Not Applicable
SUDS ID	Pregnant Women Women with Dependent Children IV Drug Users Not Applicable

Submitting an Assessment or Discharge Summary via the HaPI Upload

1. Navigate to the *HaPI Upload* link under *Tasks>My Files* on the *My ASAIS* page.
2. Click on the *HaPI Upload* link.



3. The *ASAIS-API File upload* window will open.
4. Enter your email address in the *User Email* field.

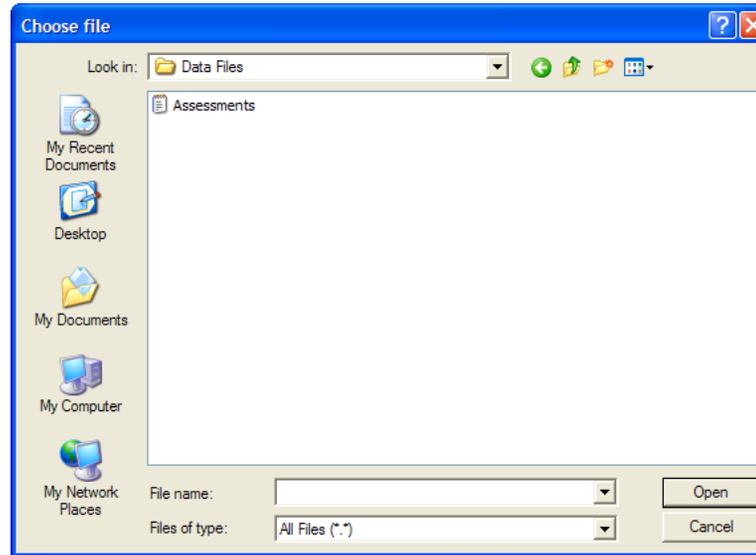
5. For an **Assessment or Discharge** file, select 'Assessment' in the *File Type* field

The screenshot shows the 'Harmony-API File upload' window. It has a blue header. Below the header are three input fields: 'User Email' with the value 'Kristopher.Vilamaa@mh.alabama.gov', 'File Type' with a dropdown menu set to 'Assessment', and 'Select File' with the path 'C:\Documents and Settings\dmliller\My...' and a 'Browse...' button. At the bottom are 'Upload' and 'Close' buttons.

6. Click on the *Browse* button to locate the file you wish to upload.

Check with your System Administrator as to the standard location of the files on your computer or network.

7. After browsing to the desired file, click on the *Open* button.



8. Back in the HaPI Upload window, click on the *Upload* button.

9. Click on *OK* in the *File Submitted Successfully* message window.

ASAIS Discharge Process

Discharging a Client from your Agency - Client has finished service, left service and not expected to return

1. Find the client's record in ASAIS.
2. If a client received a service beyond assessment, click on the *Profiles and Discharge Summaries* tab.
3. **If a client only received an assessment or received no service, click on *Enrollments* and skip to Step 15.**

Demographics | Episode | Enrollments | **Profiles and Discharge Summaries** | Diagnosis | Notes | Medications | Payers | Eligibility

Filter
 Profile or Discharge

1 Profiles and Discharge Summaries record(s) returned - now viewing 1 through 1

Profile or Discharge	Review	Review Date	Entered By	Fund Code	Status
SA Client Profile	Assessment	07/09/2009	Assessment, Aletheia House	SA	Complete

<< First | < Previous | Retrieve 50 Records at a time | Next > | Last >>

4. Click *Add Profile or Discharge*.
5. Select *SA Discharge Summary* from the dropdown.
6. Set the Status to *Complete*
7. Select your Provider name
8. Complete the questions asked regarding the client's situation at discharge.
9. Click *Save and Close Profile or Discharge*.

File - Spell Check - - Save Profile or Discharge - **Save and Close Profile or Discharge** - Copy From Previous - - Print - Close Profile or Dis

Please Select Type: **SA Discharge Summary**

Consumer Assessments

Review * Entered By * Assessment, Aletheia House ...

Review Date * 2/4/2010

Fund Code * SA Status *

Provider *

Co-Dependant / Collateral: No

Date of Last Contact:

Reason for Discharge, Transfer or Discontinuance of Treatment*

10. A WFW will appear for you to review the client's diagnoses and add a discharge diagnosis if necessary.
11. Cancel the tickler by hovering your mouse to the right of the "Review Diagnosis" box. A fly out menu will appear, click *Cancel*.

SA Discharge Enrollment

[Review Diagnosis](#)
Add a Discharge Diagnosis if it has changed

harmony INFORMATION SYSTEMS, INC.

Diagnosis

2/5/2010 8:49 AM

File - Print - Close Diagnosis

Filter

Search Reset

3 Diagnosis record(s) returned - now viewing 1 through 3

Review	Review Date	Provider	Diagnosis By	Status	Primary Diag Code	Primary Diag Description	Axis I Diag Code	Axis II Diag Code
Assessment	11/03/2008		Assessment, UAB Drug Free	Complete	304.30	Cannabis Dependence	304.30	
Assessment	02/04/2009	Aletheia House	Assessment, Aletheia House	Complete	303.90	Alcohol Dependence - Unspecified	303.90	
Initial	04/19/2004	UAB Drug Free	SUDS, Legacy	Complete				

<< First < Previous Retrieve 50 Records at a time Next >> Last >>>

12. If the diagnoses are correct, cancel the *Add Diagnosis if Needed* tickler and proceed to Step 14.
13. If the most recent diagnosis is incorrect, click on *Add Diagnosis If Needed*. A blank Diagnosis Detail screen will open.
14. Complete Diagnosis Detail, setting Status = *Complete*.
15. Select a substance abuse diagnosis for *Axis I, Diagnosis 1*.
16. *Save Diagnosis Detail*.

Workflow Wizard

File

SA Discharge Enrollment

[Add Diagnosis if Needed](#)

harmony INFORMATION SYSTEMS, INC.

File - Spell Check - Save Diagnosis Detail - - Print - Close Diagnosis Detail

Section 1

Review * Update

Review Date * 2/5/2010

FundCode *

Provider *

Diagnosis By * Assessment, Aletheia House

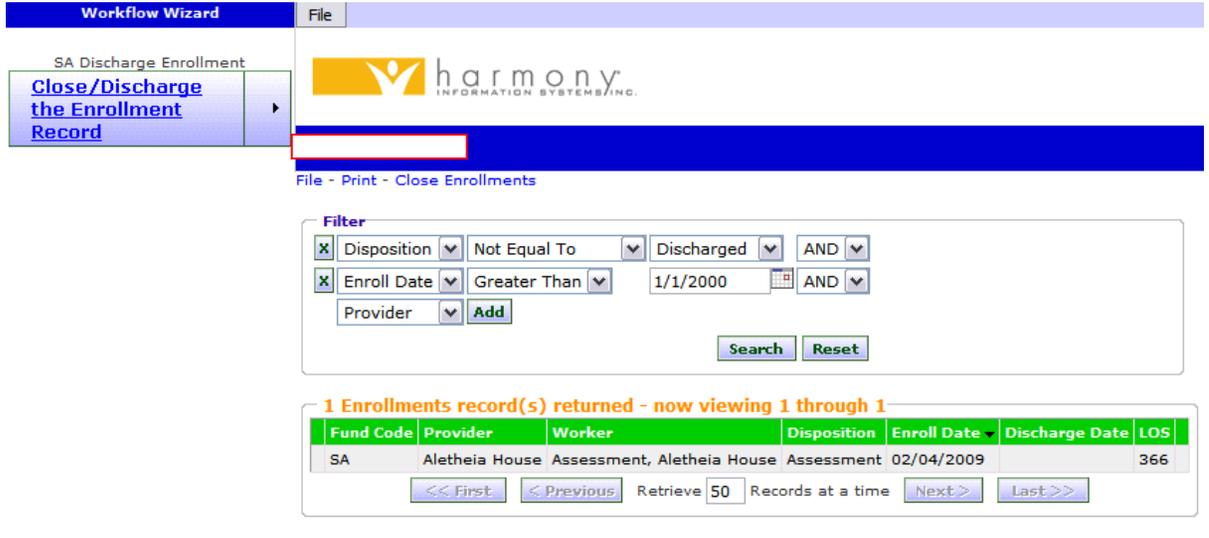
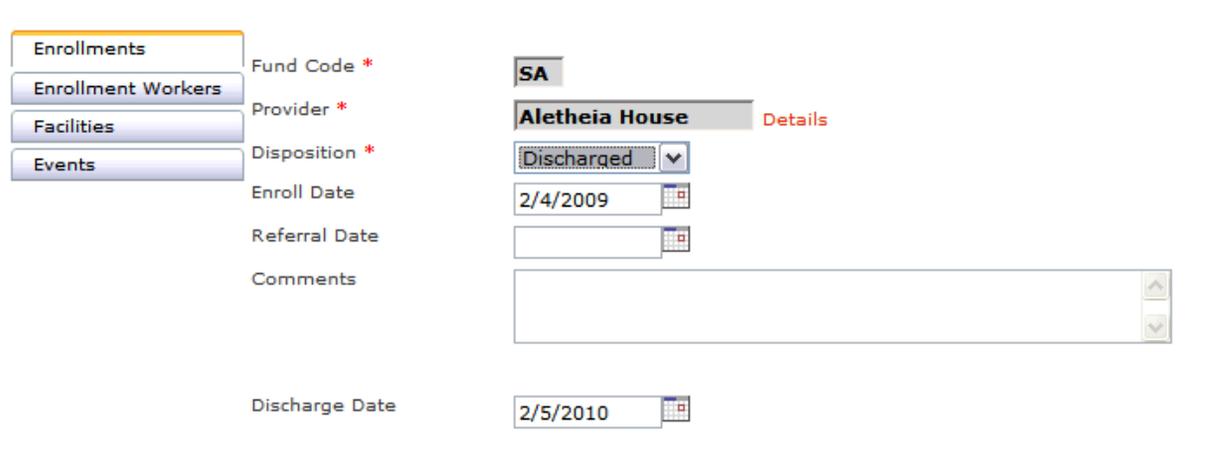
Status * Pending

Primary Diagnosis Axis I Diagnosis 1

Primary Diagnosis Code

Axis I

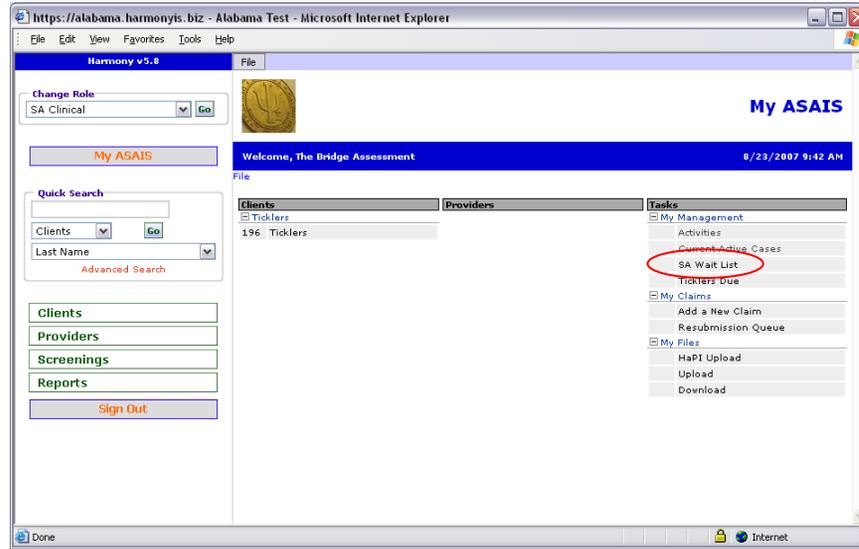
Diagnosis 1

<p>17. Click on the Close/Discharge the Enrollment Record.</p> <p>18. A list view of the client's enrollments will appear.</p> <p>19. Click on the enrollment for your agency.</p>	 <p>The screenshot shows the 'Workflow Wizard' interface. On the left, there is a sidebar with a button labeled 'Close/Discharge the Enrollment Record'. The main area displays the 'harmony INFORMATION SYSTEMS INC.' logo and a search filter. The filter is set to 'Disposition' 'Not Equal To' 'Discharged' and 'Enroll Date' 'Greater Than' '1/1/2000'. Below the filter, a table shows 1 enrollment record(s) returned, with details for Fund Code SA, Provider Aletheia House, Worker Assessment, Disposition Assessment, Enroll Date 02/04/2009, and LOS 366.</p>
<p>20. Change the Disposition to <i>Discharged</i>.</p> <p>21. The <i>Discharge Date</i> will default to today's date – correct the date if that is not the right date – no services can be billed after this date.</p> <p>22. You may enter comments into the Comments field.</p> <p>23. Click on <i>Save and Close Enrollments</i>.</p> <p>24. Click on OK.</p> <p>You have completed the discharge process.</p>	 <p>The screenshot shows the 'Enrollments' form. The 'Fund Code' is SA, 'Provider' is Aletheia House, and 'Disposition' is Discharged. The 'Enroll Date' is 2/4/2009 and the 'Discharge Date' is 2/5/2010. There is a 'Comments' field and a 'Details' link for the provider.</p>

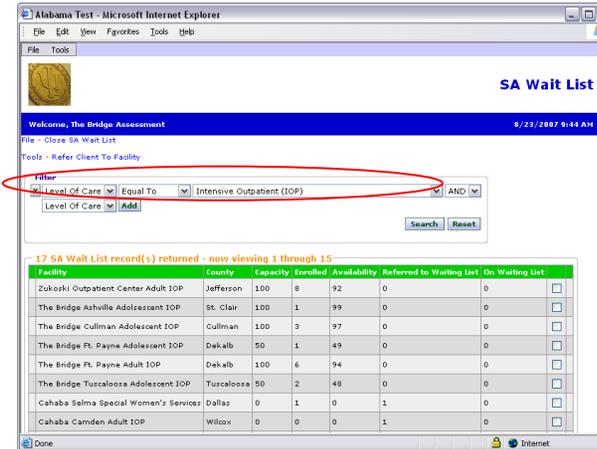
Wait List Management

SA Wait List (Facility Availability Queue)

1. Users can refer clients to other providers using the *SA Wait List* from the *My ASAIS* page, under *My Tasks>My Management*.
2. Change your role to “SA Wait List”
3. Now click on the link under Tasks for *SA Wait List*.
4. The *SA Wait List* screen will open.



5. Users can filter the list by *Level of Care* by choosing it in the *Filter* dropdown and clicking on *Search*.



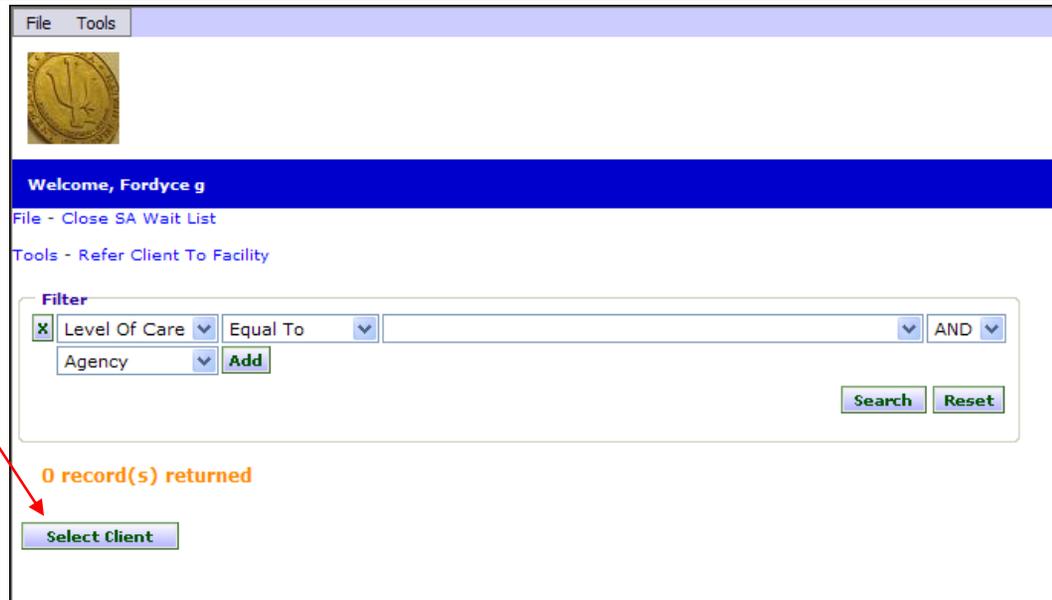
6. The list shows by facility/level of care, the following:

- a. *Facility Name*
- b. *County* where the facility is located
- c. *Capacity* of this facility: certified beds for residential programs and identified capacity for IOP programs.
- d. Number of clients currently *Enrolled* in this facility
- e. *Availability* – unused capacity for this facility
- f. Number of clients who have been *Referred to Waiting List* of this facility
- g. Number of clients who are currently (have been accepted) on the *Waiting List* for this facility

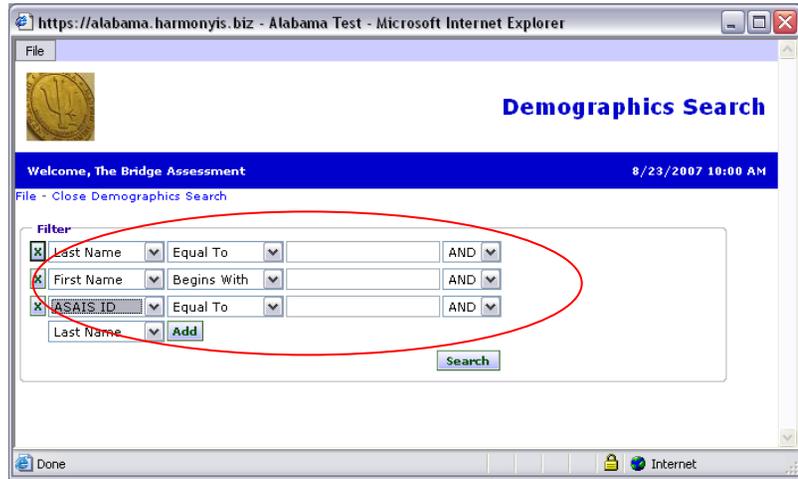
Referring a Client to Another Provider

To refer a client to a Wait List, follow these steps:

- 1. From the desktop, click on *SA Wait List*.
- 2. **Before using the filter to select facilities**, Click on the *Select Client* button at the bottom of the *SA Wait List* screen.



3. The Demographics Search screen will appear.
4. Use the Search Filter to locate the desired client record:
 - a. Choose the Search criteria (options include Last Name, First Name, ASAIS ID, DOB, SSN and Medicaid ID)
 - b. Click on the Search button.



5. One or more clients will appear in the grid depending on the criteria that you used. Click on the client's record to select it for referral to one or more wait lists.



6. The Client will be listed on the facility wait list screen after the system refreshes.

Welcome, Fordyce g
File - Close SA Wait List
Tools - Refer Client To Facility

Filter
 Level Of Care Equal To [] AND []
 Agency [] Add

Search Reset

0 record(s) returned

Select Client Selected Fund Code: SA

1 SA Wait List record(s) returned - now viewing 1 through 1

ASAIS ID	First Name	Last Name	SSN	DOB
139392	Donald	Testing	249-24-9290	05/15/1968

<< First Previous Retrieve 50 Records at a time Next >> Last >>

7. Now in the SA Wait List grid, filter for the correct level of care for this client. All facilities statewide will appear for that level of care.

If you want to view facilities in a particular county, you can add County to the filter and Search for facilities just in that County.

Filter
 Level Of Care Equal To Clinically Managed High Intensity Residential (Crisis Res) AND []
 Agency [] Add

Search Reset

6 SA Wait List record(s) returned - now viewing 1 through 6

Facility	Agency	County	Capacity	Enrolled	Availability	Referred to Waiting List	On Waiting List	
Pearson Hall Male Crisis Residential	Alcohol and Drug Abuse Treatment	Jefferson	32	13	19	0	0	<input type="checkbox"/>
Pearson Hall Female Crisis Residential	Alcohol and Drug Abuse Treatment	Jefferson	16	8	8	0	0	<input type="checkbox"/>
The Bridge Gadsden Adolescent Crisis Res	The Bridge Inc.	Etowah	20	9	11	0	0	<input type="checkbox"/>
The Bridge Mobile Adolescent Crisis Residential	The Bridge (Mobile)	Mobile	20	14	6	0	0	<input type="checkbox"/>
The Bridge Mobile GEMS Adolescent Crisis Residenti	The Bridge (Mobile)	Mobile	4	0	4	0	0	<input type="checkbox"/>
A Woman's Place Female Crisis Residential	MHB of Bibb-Pickens-Tuscaloosa Counties	Tuscaloosa	15	0	15	0	0	<input type="checkbox"/>

<< First Previous Retrieve 50 Records at a time Next >> Last >>

Select Client Selected Fund Code: SA

1 SA Wait List record(s) returned - now viewing 1 through 1

ASAIS ID	First Name	Last Name	SSN	DOB
105945	JASON M	TESTER	423-25-9438	09/25/1979

8. Select the desired facility (or facilities) for the referral by checking the box to the right of the facility. You can refer to one facility or to a number of facilities at once.

Detox	25	0	25	0	0	<input type="checkbox"/>
Cahaba Cares Adult IOP	100	0	100	0	0	<input type="checkbox"/>
West St Center	12	1	11	0	0	<input checked="" type="checkbox"/>
Cahaba Wilcox County Adult IOP	100	0	100	0	0	<input type="checkbox"/>

<< First < Previous Retrieve 15 Records at a time Next > Last >>

9. From the *Tools* menu, select *Refer Client to Facility*.
10. The client is now enrolled in the checked facility(ies) with a status of 'Referred.'

NOTE: The system may give you a failed message for some referrals. If a client is already open or referred to a facility, the wait list will not let you create another record for that same facility.

File Tools

Welcome, Kris Vilamaa 3/26/2007 12:08 PM

File - Close Facility Availability Queue

Tools - Refer Client To Facility

Filter

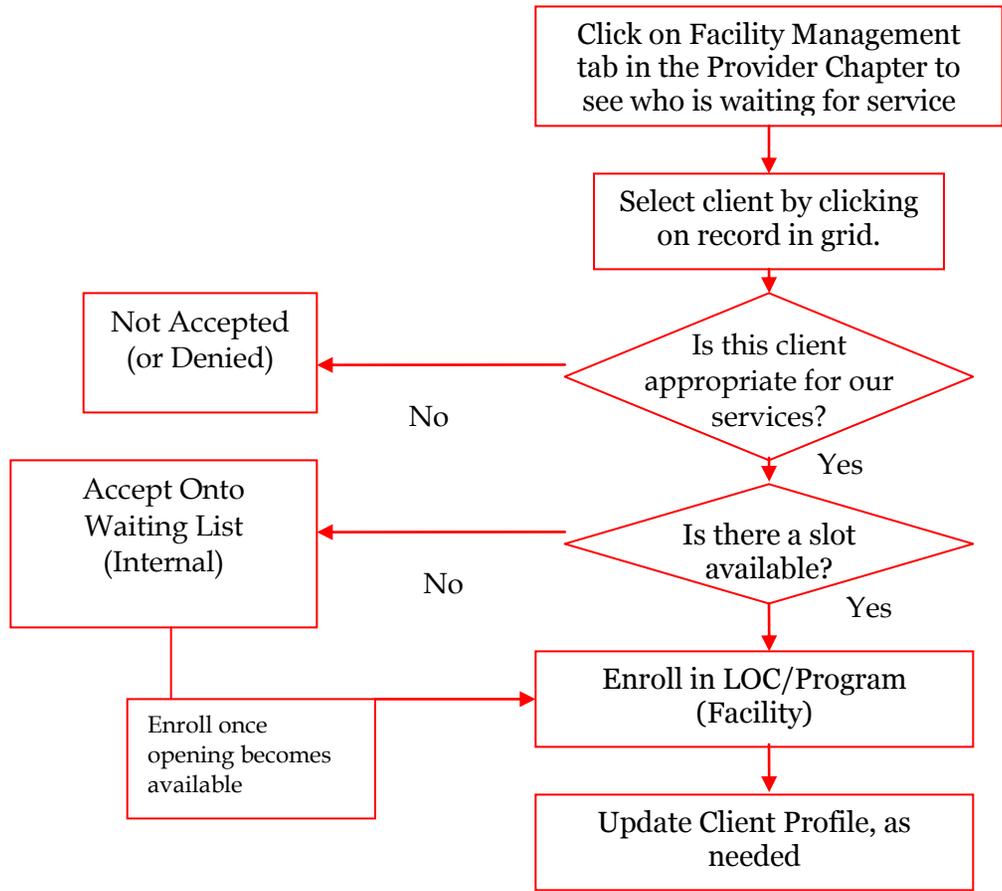
Level Of Care

39 Facility Availability Queue record(s) returned - now viewing 1 through 15

Facility	County	Capacity	Enrolled	Availability	Referred to Waiting List	On Waiting List
1 (Outpatient)		3	0	3	0	<input type="checkbox"/>
Test		0	0	0	1	<input type="checkbox"/>
123		10	0	10	1	<input type="checkbox"/>
123		10	0	10	2	<input type="checkbox"/>

SA Work Flow - Receiving a Referral

4.
Client presents as referral from
Assessment Provider (already
screened by them)



Managing the Referrals from Other Providers

1. Click on the Provider Chapter on the My ASAIS desktop.
2. Click on the Facility Management tab in your provider record
3. The system defaults to show you all referred clients

The screenshot shows the 'My ASAIS' desktop interface. On the left, a sidebar menu has 'Providers' highlighted. A callout bubble points to this menu with the text '1. Click Here'. The main content area is titled 'Facility Management' and shows a 'Test Provider' record for 'Test Provider' (ID 103). A second callout bubble points to the 'Facility Management' tab in the top navigation bar with the text '2. Click Here'. Below the navigation, there is a filter section with 'Disposition' set to 'Referred'. A table displays 155 records, with the first few rows visible:

Facility	Client	ASAIS ID	Disposition	Disposition Date	Gender	Age	LOS	Special Population	County
Zukoski Outpatient Center Adult IOP	OLIVER, lidiana	140896	Referred	04/14/2008	Male	30.2	295	Not Applicable	
Zukoski Outpatient Center Adult IOP	Norris, william	144523	Referred	04/02/2008	Female	30.2	307		
Pearson Hall Female Crisis Residential	CRAWFORD, DARRYL	101092	Referred	08/14/2008	Female	30.2	173	Women with Dependent Children	Marshall
Olivia's House Female Residential Rehabilitation	CRAWFORD, DARRYL	101092	Referred	08/14/2008	Female	30.2	173	Women with Dependent Children	Marshall

4. Select the client whose disposition you want to change.

This screenshot shows the same 'Facility Management' interface as above, but with a red arrow pointing to the second row of the table: 'Zukoski Outpatient Center Adult IOP' for client 'Norris, william'. The filter remains set to 'Disposition: Referred'.

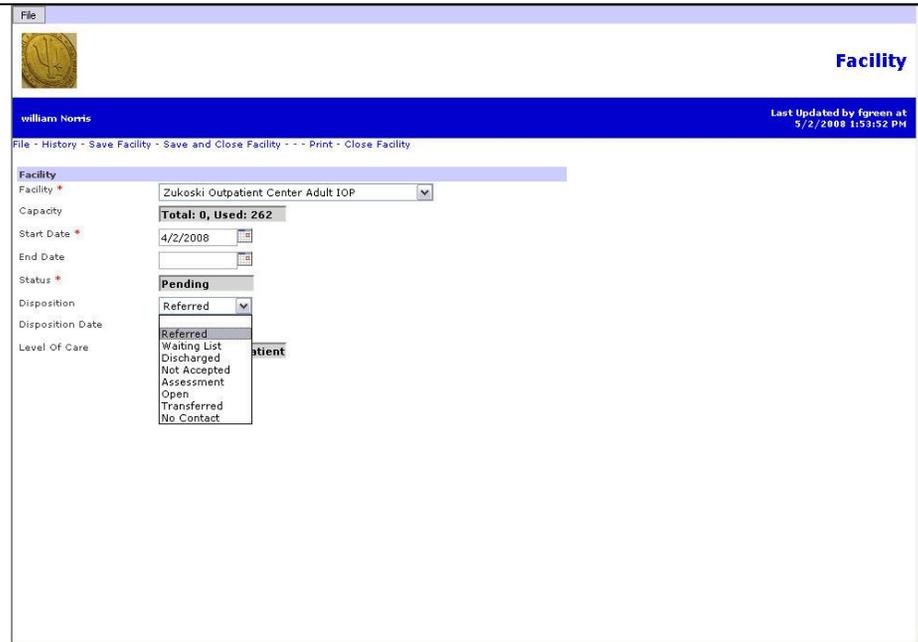
Facility	Client	ASAIS ID	Disposition	Disposition Date	Gender	Age	LOS	Special Population	County
Zukoski Outpatient Center Adult IOP	OLIVER, lidiana	140896	Referred	04/14/2008	Male	30.2	295	Not Applicable	
Zukoski Outpatient Center Adult IOP	Norris, william	144523	Referred	04/02/2008	Female	30.2	307		
Pearson Hall Female Crisis Residential	CRAWFORD, DARRYL	101092	Referred	08/14/2008	Female	30.2	173	Women with Dependent Children	Marshall
Olivia's House Female Residential Rehabilitation	CRAWFORD, DARRYL	101092	Referred	08/14/2008	Female	30.2	173	Women with Dependent Children	Marshall
Pearson Hall Residential Dextoxification	MOODY, Jeffrey	269537	Referred	08/14/2008	Female	30.2	173	Not Applicable	Marshall
Pearson Hall Male Crisis Residential	MERCIER, Jason	272680	Referred	08/14/2008	Male	30.2	173	IV Drug Users	Marshall
Olivia's House Female Residential Rehabilitation	WILLIAMS, Melinda	255248	Referred	08/14/2008	Female	30.2	173	Women with Dependent Children	Marshall
Pearson Hall Residential Dextoxification	MOSELEY, Antonio T.	272677	Referred	08/14/2008	Male	30.2	173	Not Applicable	Marshall
Pearson Hall Residential Dextoxification	MOUNT, Belinda	270711	Referred	08/14/2008	Male	30.2	173	Not Applicable	Marshall
Pearson Hall Male Crisis Residential	MARK, Eddie	271656	Referred	08/20/2008	Male	30.2	167	Not Applicable	Madison
Pearson Hall Male Crisis Residential	RITCHERSON, DAVID	271441	Referred	08/20/2008	Male	30.2	167		
Olivia's House Female Residential Rehabilitation	PITTS, Kimberly	273020	Referred	08/25/2008	Female	30.2	162		

5. With referred clients, you would change the disposition to:
 - a. Not Accepted (the client is not appropriate for service)
 - b. Waiting List
 - c. Open (you are immediately putting the client into service)
 - d. No Contact (if you never received further information from the referring agency)

6. Click “Save and Close Facility”

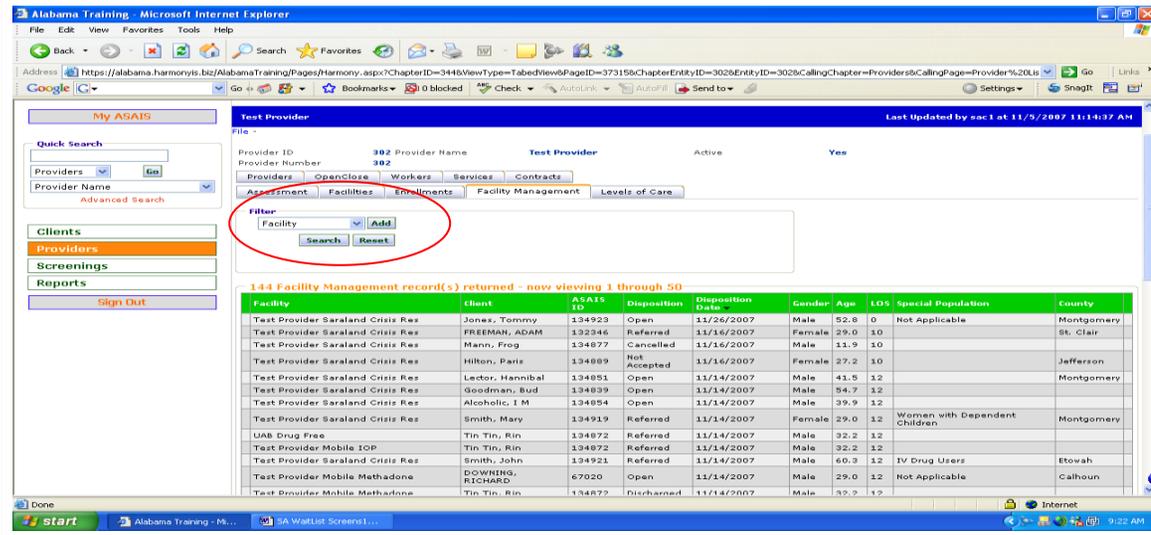
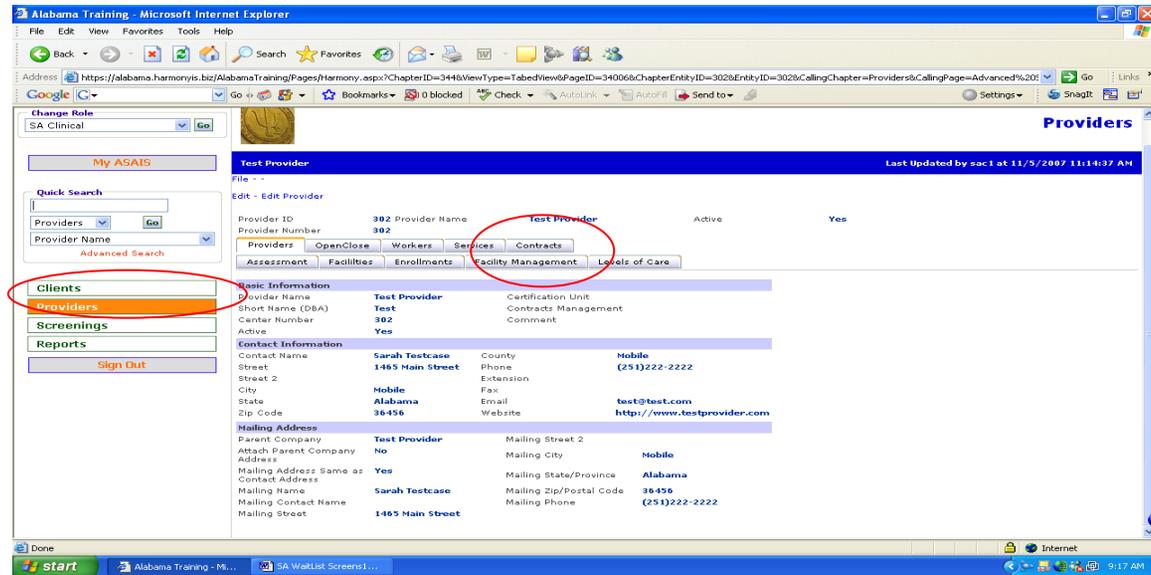
7. A confirmation message will appear that says “Save Successful”

NOTE: There is no warning when you move a referred or wait list client to open that they are being cancelled to other facilities with the same level of care. However, the action IS taking place.



Provider Facility Management

1. Click on the Providers chapter button to arrive at the Provider screen. The screen will default to the Provider tab which is similar to the client's demographic screen.
2. Click on the Facility Management tab.
3. Use the filter to narrow down your search. Use the green column headers to sort the lists. Some examples follow.
4. Use this tab and these filters to view client placement and status.
5. Use this grid to accept or deny clients to your wait list or to move a client from the wait list to open.
6. Use the SA Wait List grid to refer out clients.

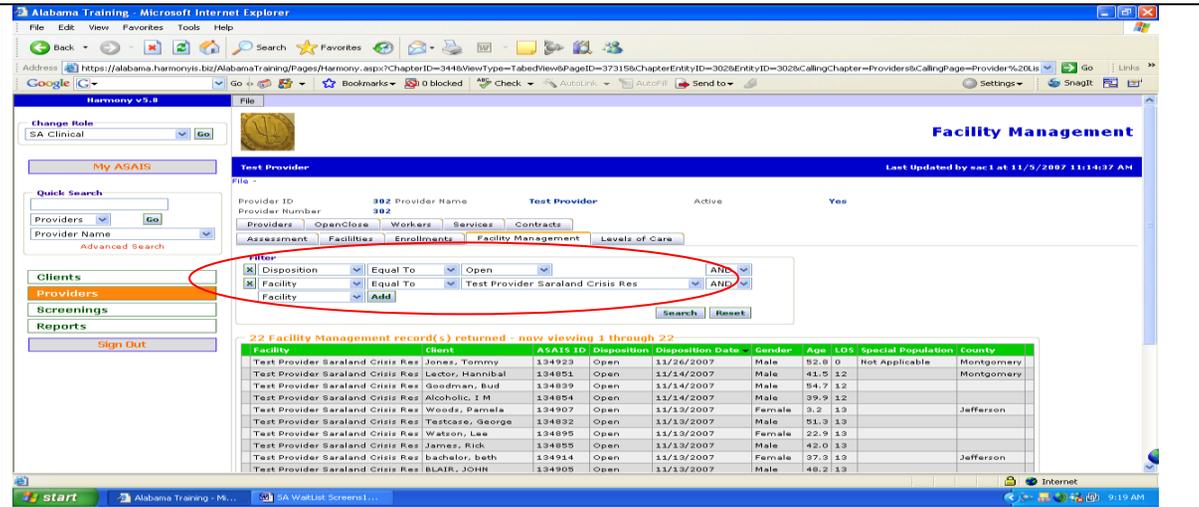


Examples:

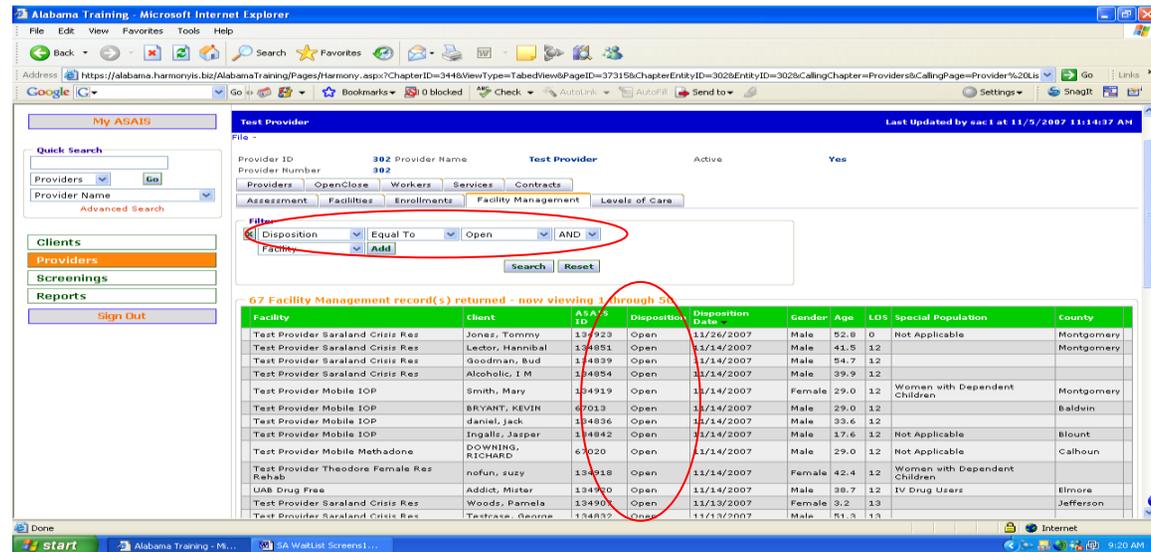
7. Filter here is set to:

Disposition = Open
 Facility = Test Provider Saraland
 Crisis Residential

So you can look at all of the clients who are currently *Open* to a particular facility.



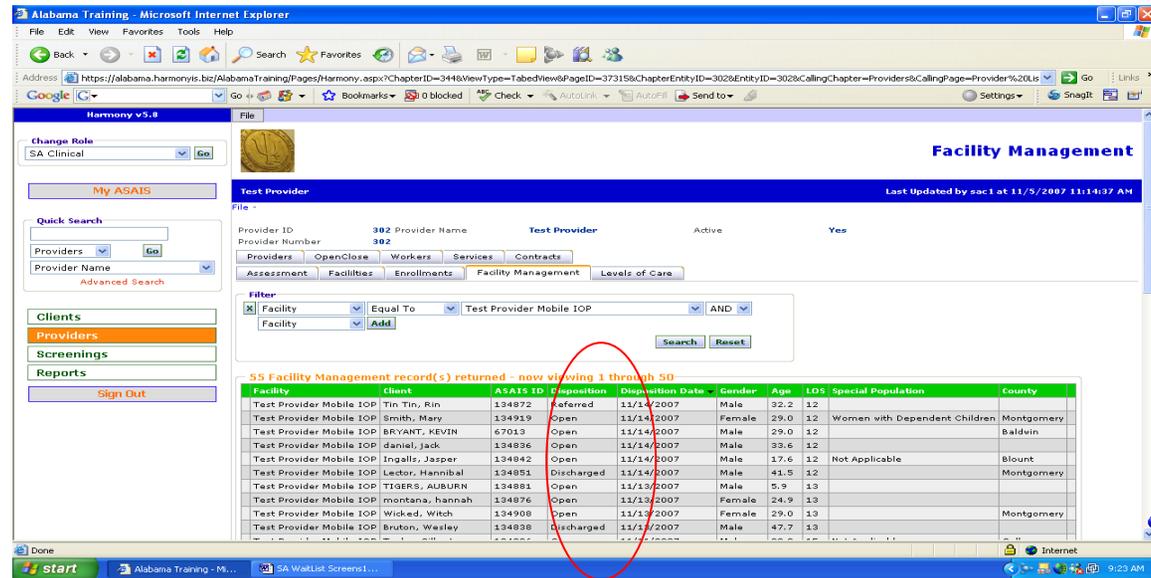
8. Filter is set to Open, no facility is specified so this gives you a list of all Open clients across facilities for your provider.



9. Facility is set to:

Test Provider Mobile IOP

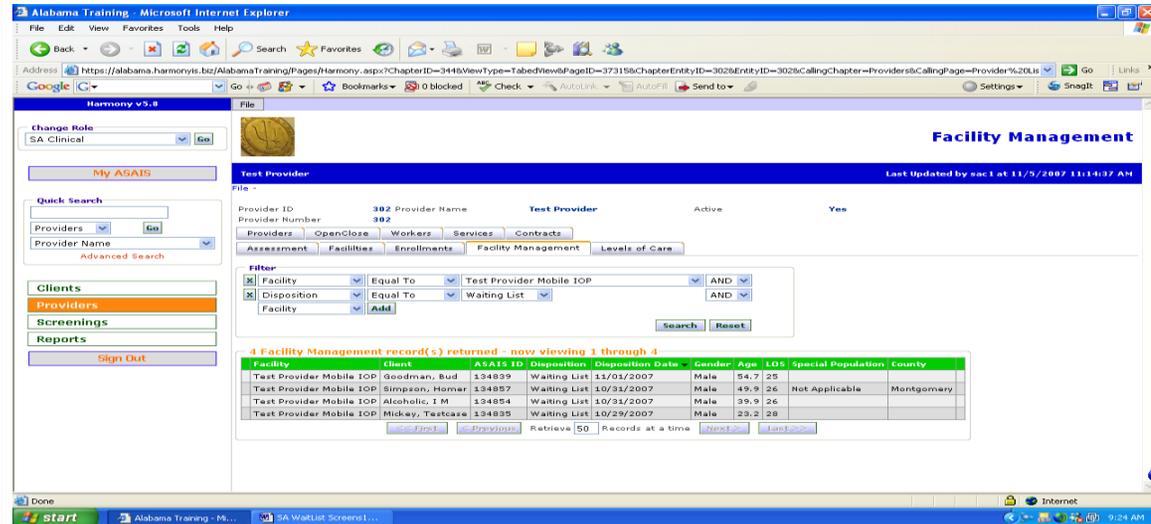
Disposition is not used in the filter so all clients with any disposition will be listed.



10. By adding a Disposition filter of:

= to *Waiting list*

The grid shows only those on the waiting list for this facility.



Client Records Overview

Navigating a Client's Record

Harmony v6.1.0.0

File Edit 4

Change Role

SA Clinical Go

My ASAIS

Quick Search 5

Participating

Clients Go

Last Name Go

Advanced Search

Clients

Providers

Screenings

Reports

Sign Out

Demographics

Bridget Testhh Last Updated by hhamlin
at 12/9/2008 8:55:50 AM

File - Print - 4
Edit - Edit Demographics

Last Name	Testhh	Status	Active
First Name	Bridget	Medicaid ID	na
ASAIS ID	274485	SSN	402-84-0209
Middle Name	2		

Demographics
Episode
Enrollments
Profiles and Discharge Summaries 1

Diagnosis
Notes
Medications
Payers
Eligibility

Demographics

Date of Birth	3/28/1965	Gender	Female
Date of Death			

Contact Information

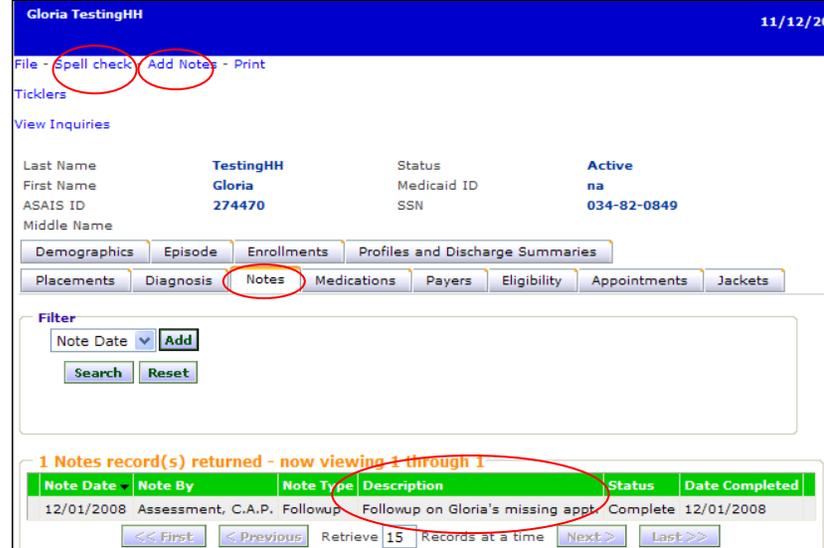
County	Montgomery	State	Alabama
Street	982 Blackstone Blvd	Zip Code	36117
Street 2		Home Phone Number	(334) 089-0809
City	Montgomery		

1. Tabs	A Client's record is broken up into different categories of data. These categories called Tabs (or sometimes pages) are displayed horizontally across the screen. Two rows of tabs will be seen.
2. Active Tab	The currently active Tab is highlighted. The ASAIS menu bar and the information displayed below the tabs correlates to the active Tab.
3. Data/List View	The information displayed below the tabs that correlates to the active Tab. Information may be displayed in a list. To open an item in the list, simply click on it. (Demographic information can be edited by selecting Edit Demographics from the Edit menu in the ASAIS menu bar.)
4. ASAIS Menu Bar	The Menu Bar contains a set of menus that allow the User to access different functions related to the Client's record. Alternatively, the same menu items are displayed as links that show all available options for any particular screen.
5. Participating Check Box	The Participating check box can be used during a client search to narrow down the records to be displayed but pulling only records who have a currently active enrollment with your agency.

Adding a Note to a Client's Record

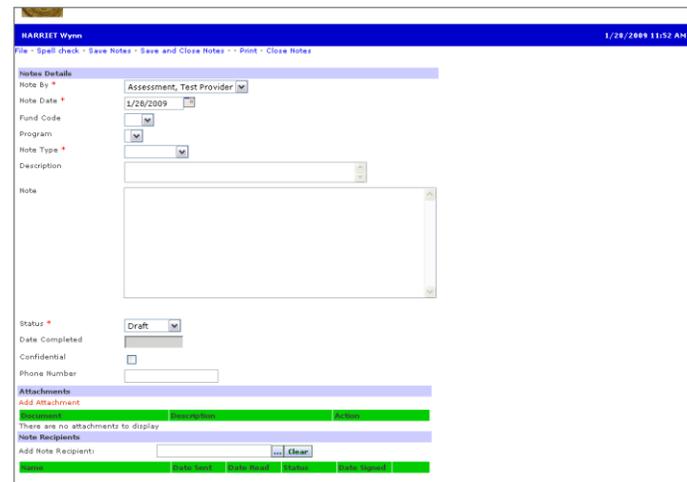
NOTE: Notes should be used to request changes to a client's info by Central Office Staff. **Changes should not be requested through a screening or unencrypted e-mail.**

1. To add documentation regarding the client, first locate their record using Search.
2. Click on the *Notes* tab.
3. Select *Add Notes* from the File menu.
4. ASAIS also has a *spell check* feature to apply to the text of your note as needed.



5. Enter a *Description* of the note. This is important since it is this field that shows in the grid in the client's record (see screenshot above.). The description will help you determine which note it is that you wish to read. The *Note Type* will tell you if there is an attachment to view.
6. In the *Notes* screen, fill out the required information, including *Note Type*. Add the text of your note in the *Note* field.

When writing the note, remember that this note will be part of the client's record.



- The *Status* field will indicate Draft, Pending or Complete. **If you leave it as Draft, it will not get sent to the other recipients** that you may identify in #9 below. If you leave the status as Pending, recipients can add text and send it back to you. Complete finalizes the note and does not allow further updating or editing.

NOTE: Notes may also be used to attach a full assessment to a client’s record for transmission to another provider.

- To add an attachment, click on the red *Add Attachment* link. A pop-up window will allow you to select a file (Word document, pdf file or other scanned image) to attach to this note. Once the file is uploaded, it will show under the Document section.
- Under Note Recipients, click on the ellipsis button  to add *Note Recipients* if you want to send this note to one or more staff. (A search window will pop-up so you can select the staff.) A Note Recipient is not required to write or save a note. Only staff who are licensed users of ASAIS will show in the Search window.
- Select *Save and Close Note* from the *File* menu when you are finished.

Note

Status * Draft

Date Completed

Confidential

Phone Number

Attachments
[Add Attachment](#)

Document	Description	Action
There are no attachments to display		

Note Recipients

Add Note Recipient: ... Clear

Name	Date Sent	Date Read	Status	Date Signed
------	-----------	-----------	--------	-------------

Editing Client Data

Editing an Existing Client

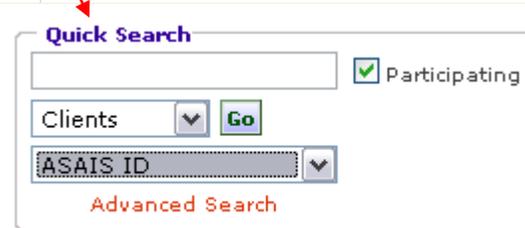
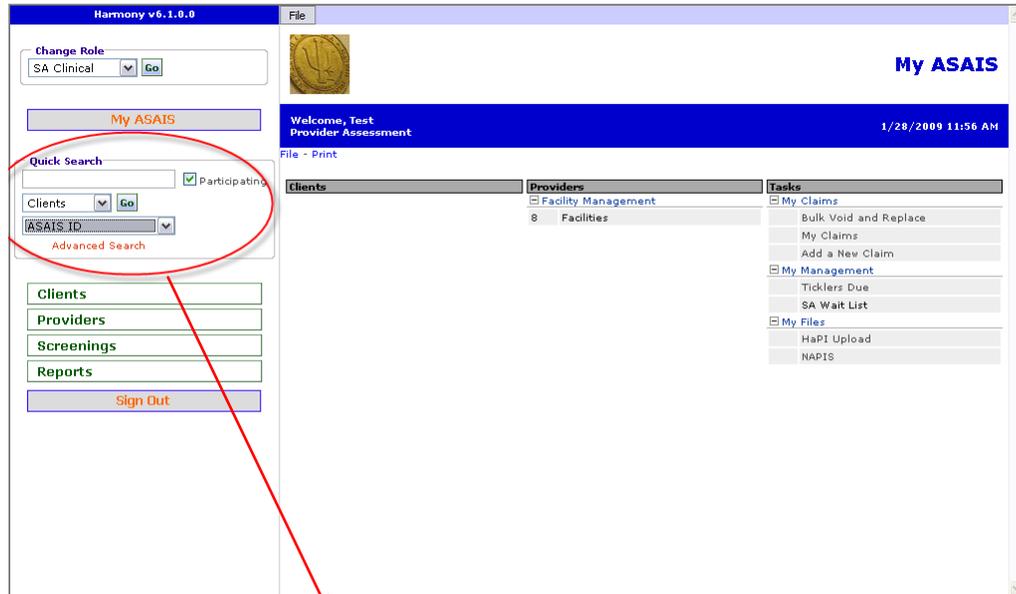
Searching for the client (Role: SA Clinical and SA Finance)

To search for a client in ASAIS, you have two options. One is using the *Quick Search* and the other is the *Advanced Search*.

1. In the *Quick Search* section, enter your client's last name and click on *Go* or enter. You can also search by ASAIS ID number, SSN, DOB or Medicaid ID by changing the value in the drop down.

If you check the Participating check box, your search results will include only those clients who have an Open Enrollment with your Provider agency, i.e., they are currently active.

If you do not check the Participating check box, your search results may include inactive clients or those who have had an Enrollment with your Provider agency but who are not currently active.



OR, a second Client Search option:

2. Click *Advanced Search* to enter more information to search for the right client. *This is especially helpful if the client has a common last name.*
3. In the filter, enter the client's last name and first name or first initial. You can also enter date of birth and/or social security number. Click on the x to the left of any filter item that you do not wish to use. This will eliminate it from your search. ASAIS will refresh the filter as you adjust the options.
4. Click *Search*. You will get a grid of possible matches to your search. Examine the information and select the client for whom you were searching.

File

Advanced Search

Welcome, Kris Vilamaa 3/26/2007 9:08 PM

File - Add New Client

Filter

X Last Name Begins With test OR

X SSN Equal To 222-22-2223 OR

X DOB Equal To 04/28/1975 OR

Case No Add

Search Reset

2 Advanced Search record(s) returned - now viewing 1 through 2

Case No	Last Name	First Name	SSN	DOB	Status
64415	Testcase	Kris	222-22-2223	04/28/1975	Active
64462	Testcase	Dan	222-22-2252	03/24/1982	Active

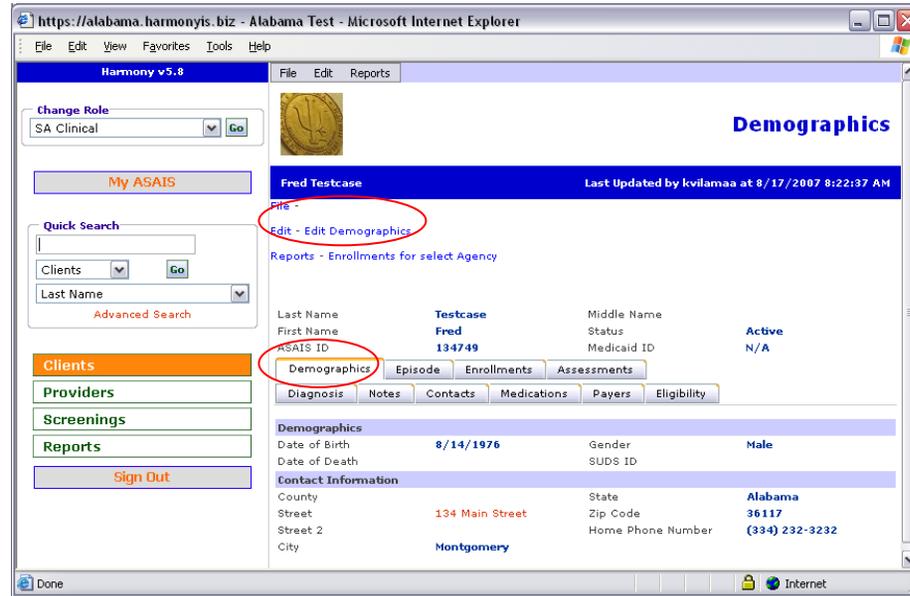
<< First < Previous Retrieve 15 Records at a time Next > Last >>

Editing Demographic Information

1. Once the client or a list of clients comes up, click on the client for whom you were searching. ***Examine all the information to make sure that this is the right person.***

2. After selecting your client, you are presented with the *client's record*.
3. Click on the *Demographics* tab. (*the record will normally open with this tab as the active one.*)
4. Click on *Edit Demographics* in the links. The full demographics screen will appear.

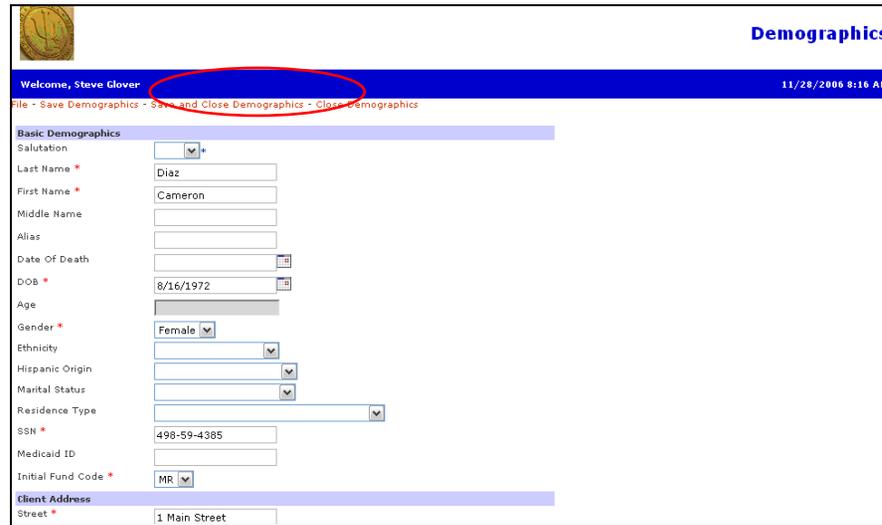
Some items will be grayed out and can only be changed by staff at SASD. Please report any needed changes to SASD, in a note, if you see incorrect information concerning name, SSN, DOB.



5. Enter as much additional data that you have for this client and change any incorrect information. Any required fields are marked with a red asterisk

Be sure to check for correct Gender, & Street Address (A COMPLETE address is required for Claims Submission.)

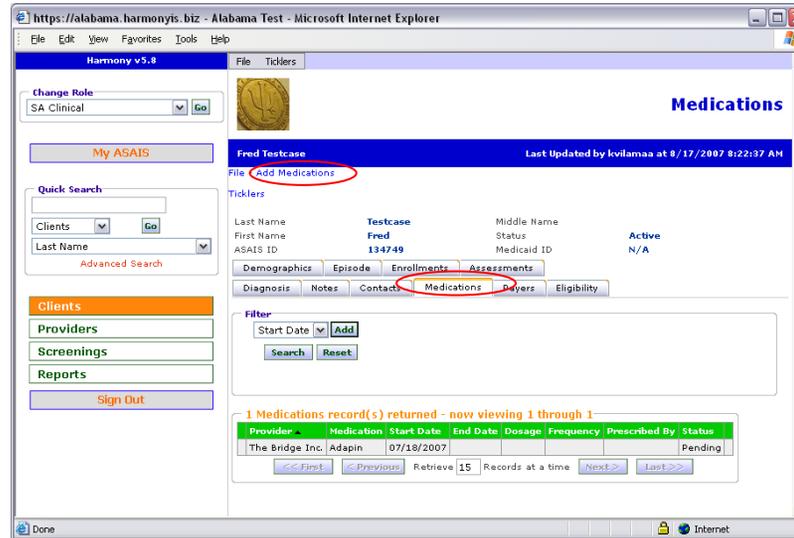
6. Click *Save and Close Demographics* when finished



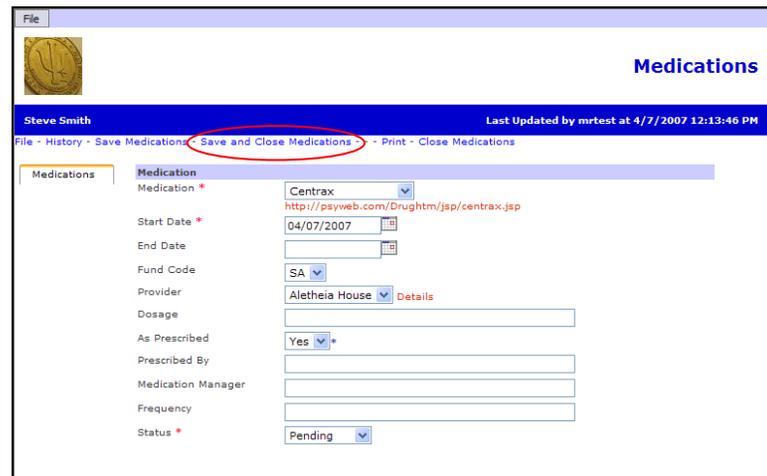
Medications

Using the Medications tab, you can capture the information about any medications that this client may be taking. This is not a pharmacy system, so it will not perform drug interactions, but will capture the information as a reference. This information can be very important when referring to residential programs.

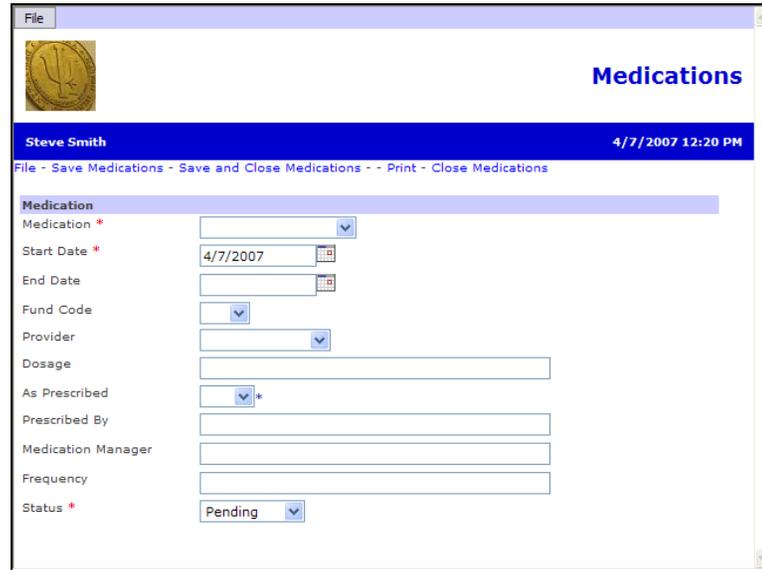
1. On the client's record, click on the *Medications* tab.



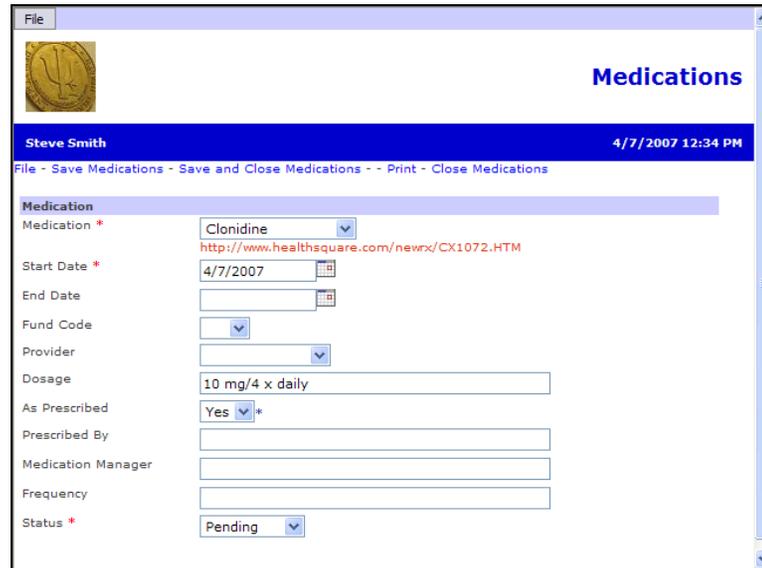
2. Edit or view an existing *Medications* record by clicking on it in the list.
3. If any changes are made, remember to select *Save and Close Medications* from the *File* menu. If no changes are made, select *Close Medications* from the *File* menu.



4. If you would like to add a new medication, select *Add Medications* from the *File* menu.
5. The *Medications* screen will appear.



6. Using the drop down box, select the *Medication* for this client.
- Note**
Once you select a medication, a hyperlink may appear that will take you an external website when clicked. This website will provide information about the medication.
7. Complete any other information you have for this medication.
 8. Select *Save and Close Medications* from the *File* menu.



Program Enrollments

As new clients are entered via a Screening, the SASD staff will establish the first Enrollment record equal to *Assessment* with your agency. The worker for this enrollment will be a generic assessment worker with your agency (e.g. Assessment, The Bridge). This will allow one or more staff at your agency to have access to assessment records. When you decide to enroll the client into your program, you will update this enrollment record to Open instead of Assessment.

Updating an Enrollment for an Existing Client

1. Navigate to the desired client record by using the *Search* features or selecting it from *Current Active Cases* under *My Management* on the *My ASAIS* page.
2. Click the *Enrollments* tab.
3. Select the Enrollment record for your agency in the Enrollment grid.

The screenshot shows the Harmony v5.8 web application interface. The browser address bar displays 'https://alabama.harmonyis.biz - Alabama Test - Microsoft Internet Explorer'. The application header includes 'Harmony v5.8' and 'File Ticklers'. A 'Change Role' dropdown is set to 'SA Clinical'. The 'My ASAIS' section contains a 'Quick Search' box and a 'Last Name' dropdown. The 'Clients' sidebar lists 'Providers', 'Screenings', and 'Reports'. The main content area shows the 'Enrollments' tab selected for 'Fred Testcase', with a red circle around the tab label. Below the tabs are filter options and a table of enrollment records. A red arrow points from the third instruction to the 'Enrollments' tab.

Fund Code	Provider	Worker	Disposition	Enroll Date	Discharge Date	LOS
SA	The Bridge Inc.	Assessment, The Bridge	Open	07/18/2007		35

4. Update the *Program* (Facility/Level of Care) and *Disposition* as appropriate.

If a client is moving from one Facility/LOC to another, Add Facility to this record. Do not change the existing facility record to the new LOC as you will lose history and may create claims denials as the client will no longer be eligible for services in the previous LOC.

In the existing LOC record, change the disposition to Transferred then Add Facility for the new LOC that will have the Open disposition.

5. The dates will default to the current date, but can be changed if desired.
6. Select the appropriate *Primary Worker* for this *Program* enrollment.
7. Select *Save and Close Program* from the *File* menu.

The screenshot shows a web application window titled "Enrollments". At the top, there is a blue header bar with the user name "John Testcase" and the time "4/7/2007 1:40 PM". Below the header is a menu bar with "File" and "Tools". A toolbar contains the following items: "File - Add Note - Save Enrollments - Save and Close Enrollments - - - Close Enrollments". The main content area is titled "Tools" and contains a form with the following fields:

- Fund Code *: SA
- Provider *: Alcohol and Drug Abuse Treatment Center
- Program: Pierson Hall Residential Dextoxification
- Capacity: Total: 20, Used: 2
- Disposition *: Pending
- Disposition Date *: 04/07/2007
- Wait List Date: (empty)
- Primary Worker *: Vilamaa, Kris
- Enroll Date *: 04/07/2007

Each field has a "Details" link next to it.

Provider Record Review

Navigating a Provider's Record

Harmony v7.3.1.0

File Edit 4

Change Role
SA Clinical Go

My ASAIS

Quick Search
Providers Go
Provider Name
Advanced Search

Clients
Providers
Screenings
Reports
Sign Out

Aletheia House

File - - Print -
Edit - Edit Provider

Provider ID 174 Provider Name Aletheia House Active
Provider Number 204

Providers OpenClose Workers Services
Assessment Facilities Enrollments Facility Management Notes Levels of Care

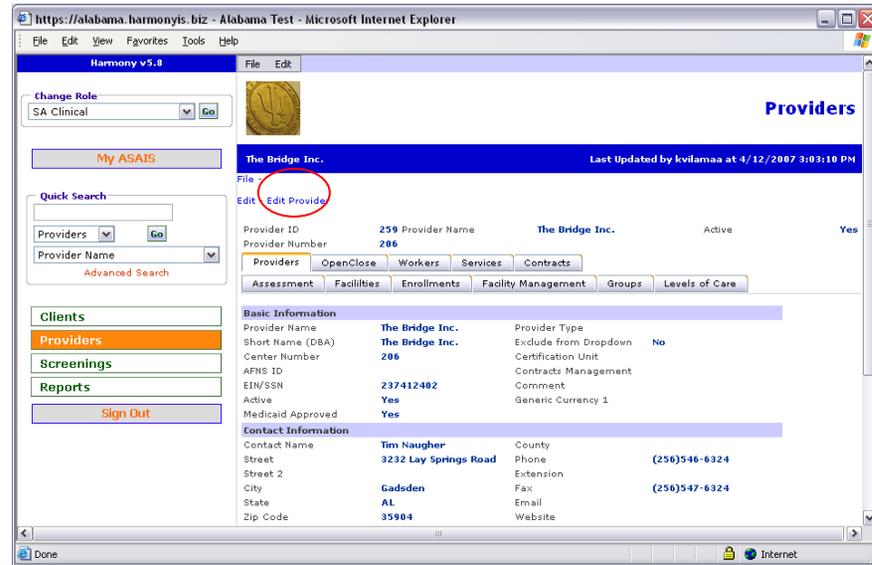
Basic Information
Provider Name Aletheia House Certification Unit 202
Short Name (DBA) Aletheia House Contracts Management 202
Center Number 204 Comment
Provider Type Multiple Levels of Care

Contact Information

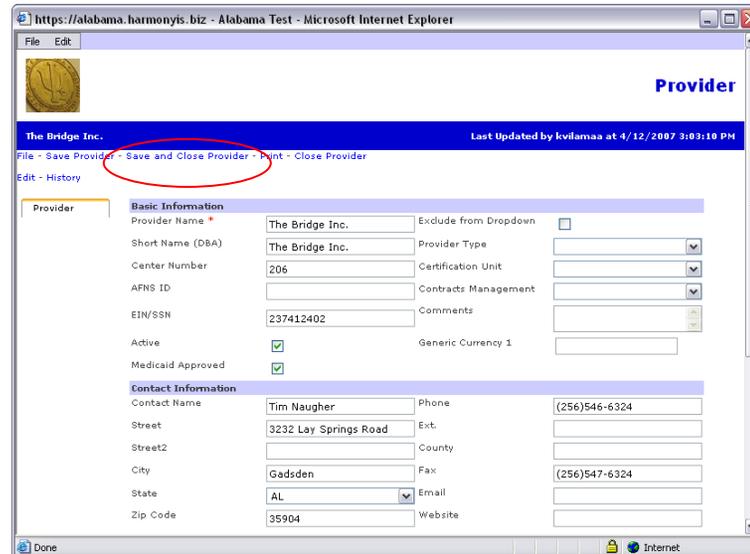
1. Tabs	A Provider’s record is broken up into different categories of data. These categories called Tabs (or sometimes pages) are displayed horizontally across the screen. Several sets of tabs may exist – to navigate to the next (or previous) set, click on the arrows at the end of the currently displayed set.
• Enrollments	Navigating to the Enrollments tab and clicking on it reveals a list of clients currently enrolled with the Provider. Users may click on a record to open it, but you can not edit enrollments here.
• Facilities	The Facilities tab will give you a grid of all facilities identified for this provider. There is a facility record for each one with location address and capacity identified.
• Facility Management	Facility Management tab provides a way to manage the enrollments in all facilities by disposition or by facility or a combination by using the filter. Clients dispositions may be managed via this tab.
• Levels of Care	Levels of care lists all levels of care that are provided by this provider.
2. Active Tab	The currently active Tab is highlighted. The ASAIS menu bar and the information displayed below the tabs correlates to the active Tab.
3. Data/List View	The information displayed below the tabs that correlates to the active Tab. Information may be displayed in a list. To open an item in the list, simply click on it. (Provider information can be edited by selecting Edit Providers from the Edit menu in the ASAIS menu bar.)
4. ASAIS Menu Bar	The Menu Bar contains a set of menus that allow the User to access different functions related to the Provider’s record. Alternatively, the same menu items are displayed as links that show all available options for any particular screen.

Editing Providers

1. Navigate to the Provider record.
2. Click *Edit Provider*



3. Edit address or other information as needed.
4. Click *Save and Close Provider* when finished.



Adding Workers

1. Click on the *Workers* tab.
2. Click *Add Worker*.

The screenshot shows the Harmony v5.8 application interface. On the left sidebar, the 'Providers' tab is highlighted. The main content area shows the 'Workers' section for 'The Bridge Inc.' with a 'File - Add Worker' button circled in red. Below this, there are tabs for 'Providers', 'OpenClose', 'Workers', 'Services', and 'Contracts'. A table displays 7 worker records with columns for Worker Name, Title, and Active status.

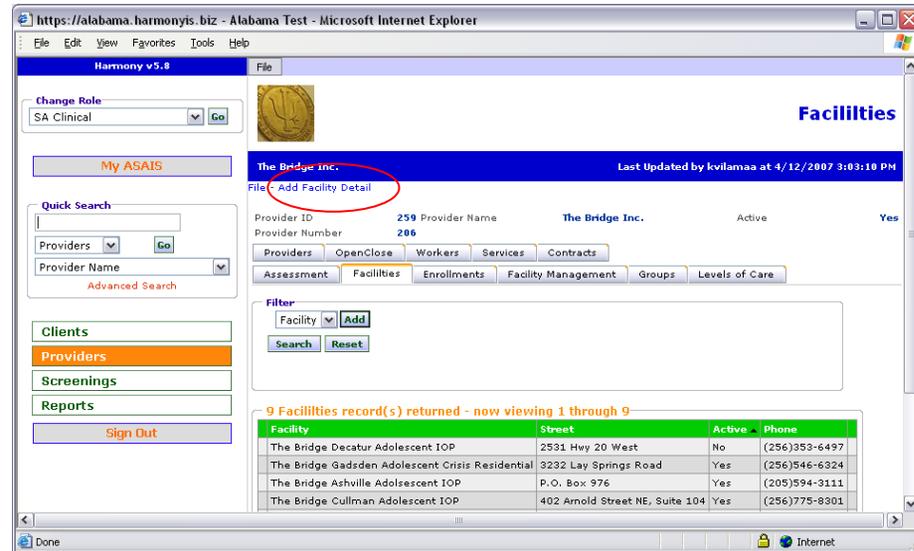
Worker Name	Title	Active
Assessment, The Bridge		True
[Redacted]		True
[Redacted]		True
[Redacted]		True

3. The *Add Worker* page will open
4. Fill out the required information for the Worker.
5. Select *Save and Close Worker* from the *File* menu when finished.
6. Repeat steps 2 through 5 if you have additional workers to enter.

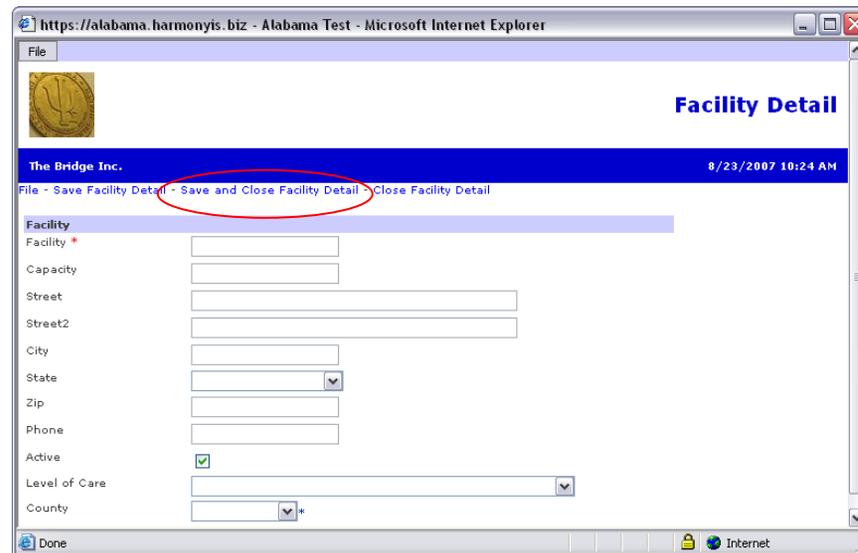
The screenshot shows the 'Add Worker' form in the Harmony v5.8 application. The form includes fields for Last Name, Middle Name, First Name, Title, Member ID, Start Date, End Date, Staff ID, Supervisor, Active (checked), and Comments. The 'File' menu is open, and the 'Save and Close Worker' option is circled in red.

Adding Facilities

1. Click on the *Facilities* tab.
2. Click *Add Facility Detail*.



3. The *Add Facility* page will open
4. Fill out the required information. Be sure to select the **Level of Care**, as well as capacity, address, and County as this information feeds the SA Wait List.
5. Select *Save and Close Facility Detail* from the *File* menu when finished.
6. Repeat steps 2 through 5 if you have additional facilities to enter.



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For additional information or assistance:

<http://www.mh.alabama.gov>

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