Solutions Delivery & Administration Division

Solutions Development Unit

Service Request Tracking System

User Manual

Version 2017.1

January 18, 2017

CONTENTS

I.   Purpose of the Service Request Tracking System

The Service Request Tracking System (SRTS) is a web-based electronic application that serves two primary purposes.

First, the SRTS includes all of the required data elements of the LACDMH Service Request Log/SRL (MH 718) and is a Department-approved process used to document an initial request for specialty mental health services (SMHS). Per regulations, all initial requests for services must be recorded in the SRL regardless of the site. An initial request is defined as any request for SMHS that will require a new assessment to be completed. This includes a potential client who does not yet have a clinical record or a client returning for services after termination/inactivity (see LACDMH Policy 312.01). SMHS may be sought by the client or someone on behalf of the client, either directly or through referral, in person or in writing. The date of the initial request is the date that the LACDMH, including its contractors, receives the request. When the initial request for services and the disposition of that request occur within the same provider site, this is a **single-site disposition**. As of October 2016, ALL sites are required to have the SRL data incorporated into their electronic health record system (EHRS) and should no longer use the SRTS to report single-site dispositions.

Second, the SRTS is used by all LACDMH provider and administrative linkage sites, (e.g., LACDMH ACCESS Center, Service Area Navigator, Countywide Resource Management, etc.), when the initial request for services originates at a site that refers the client to another LACDMH system of care provider site for disposition; this is a **multi-site disposition**. If a provider receives an initial request for services via the SRTS from another mental health provider, only the disposition of that request is required to be entered into the SRTS by the receiving provider. All LACDMH providers are required to log initial requests for services that they are referring to other LACDMH provider sites and to receive referred requests from other LACDMH provider and administrative sites.

For initial requests for services that the ACCESS Appointment Line receives from Medi-Cal managed health care providers, the SRTS also includes a shared calendar in which providers make initial assessment appointments available for the ACCESS Center to electronically schedule referred individuals within the required time frames.

SRL and SRTS data are monitored by LACDMH to ensure provider- and system-level compliance with all State requirements, ensure individuals are appropriately provided access to services, track time frames related to access to care, and monitor where referrals for services are coming from for potential or inactive clients. Please refer to LACDMH Policy 302.07, Access to Care, for detailed information regarding the requirements for responding to initial requests for SMHS, universal screening, and time frames for scheduling appointments.

II.   Accessing the Application

Open the web browser (Internet Explorer) and go to one of the following URL links:

DMH Staff Link
https://intra.dmh.lacounty.gov/SRTS (Add link to Favorites)
Use your DMH Network user name and password (same user name and password used to log on to your computer)

Non-DMH Staff Link
https://apps.dmh.lacounty.gov/SRTS (Add link to Favorites)
RSA Secure ID Token required. User Name is your C#. Password must be requested from the DMH Help Desk (213-351-1335). If you already have a password for an Outcomes Measurement Application (OMA), that will also work for the SRTS.

*It is recommended that *__one screen is open__* in the SRTS at a time. Multiple open screens have proven to create glitches, such as duplication of records or the switching of information from one record to another if not opened properly.

If you must have two windows open, it is best to open a new session:

Click on "File" from the Web Browser Menu Bar.
Click "New Session."
This will open a new session and not interrupt the current session. You will be prompted to log in.
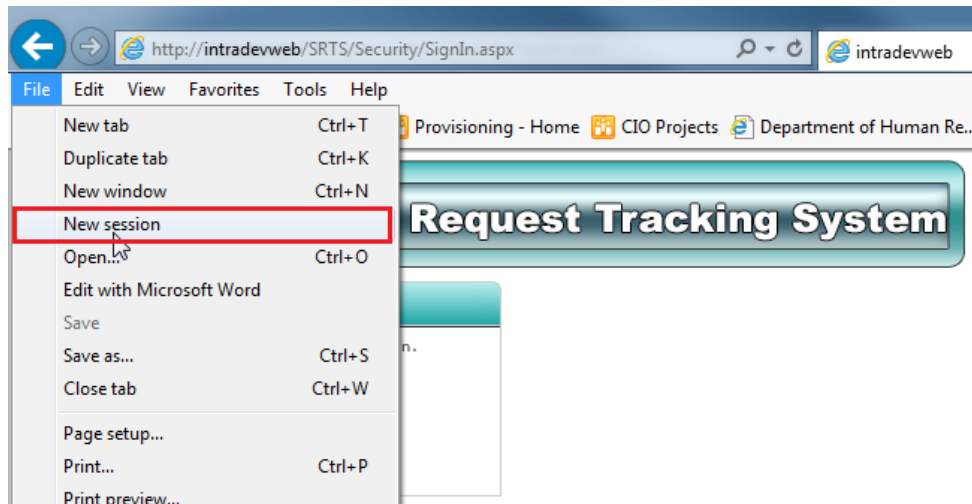
Menu on Home Page
From the SRTS Home page, you can create a service request, search for existing service requests and edit existing service requests by confirmation number.

Once you sign in with your selected location, you will notice two tables next to the menu items: a "Clients Scheduled by the ACCESS 855 Appointment Line" table showing requests created by the ACCESS 855 Appointment Line that were transferred to that location and do not yet have a Final Disposition, 10 requests at a time, and a "Service Request Reminder" table showing all requests without an Initial Disposition (hereafter referred to as pending requests) for that location, 10 requests at a time. Please note that you can sort the pending requests as you please, earliest to latest or vice-versa.

Service Request Tracking System

Scheduling
- Calendar for ACCESS Appointments

Service Requests
- Create Service Request
- Search for Existing Service Request
- Edit Service Request by Confirmation #
- Search for Program Contact
- Reports

Clients Scheduled by the ACCESS 855 Appointment Line

| 1 of 1 | 8 Items | 10 / Page |

		Tracking Confirmation #	Client Identifier	First Name	Last Name	Request Date	Appointment Date and Time
🔍	📝	30664	▬▬▬	Rickey	▬▬	6/10/2014	6/12/2014 10:00 AM
🔍	📝	31185	▬▬▬	Clifford	▬▬	6/17/2014	6/19/2014 1:00 PM
🔍	📝	42037	▬▬	GABRIEL	▬▬	10/7/2014	10/9/2014 1:00 PM
🔍	📝	55927	▬▬	ANGELA	▬	2/3/2015	2/5/2015 10:00 AM
🔍	📝	76989	▬▬	Christie	▬▬	7/15/2015	7/21/2015 9:00 AM
🔍	📝	79432	▬▬	DALE	▬▬	8/7/2015	8/11/2015 9:00 AM
🔍	📝	85326	▬▬	ALEXANDER	▬▬	9/25/2015	9/29/2015 11:00 AM
🔍	📝	92928	▬▬	Robert	S▬▬	11/19/2015	11/30/2015 1:00 PM

Service Request Reminder

| 1 of 3 | 27 Items | 10 / Page |

		Tracking Confirmation #	Client Identifier	First Name	Last Name	Request Date	Days Open
🔍	📝	88345	▬▬	DARLENE	▬▬	6/12/2015	250
🔍	📝	100399	▬▬	soso8	▬	5/2/2016	29
🔍	📝	101439	▬▬	sosi1	▬	5/9/2016	24
🔍	📝	101440	▬▬	JOYCE	▪	5/6/2016	25
🔍	📝	101444	▬▬	KATHY	▪	5/10/2016	23
🔍	📝	101448	▬▬	GRACE	▪	5/10/2016	23
🔍	📝	101449	▬▬	PEDRO	▬	5/9/2016	24
🔍	📝	101454	▬▬	SONIA	▬	5/9/2016	24
🔍	📝	101459	▬▬	MA	▬	5/9/2016	24
🔍	📝	102488	▬▬	FU	▬	5/9/2016	24

The following describe what is on the upper right corner:

       Click "Home" from any screen to return to the Home page.
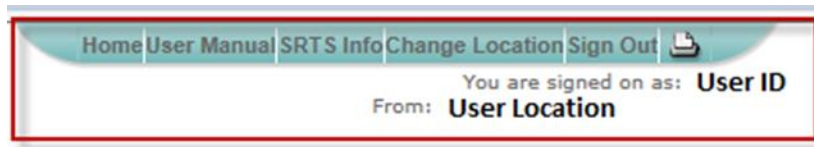
       Click "User Manual" to open the User Manual in a new page.

       Click "SRTS Info" to access the SRTS Information page.

       Click "Change Location" to change your selected user location.

       Click "Sign Out" to sign out.

       Click the printer icon [printer icon] to print the page.
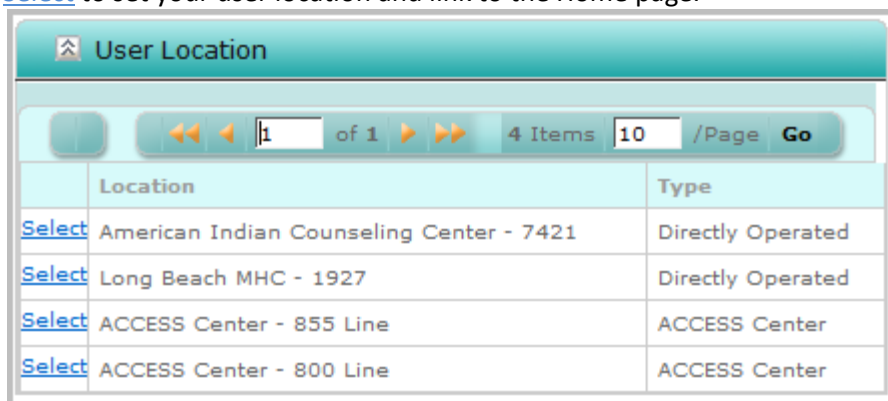

User Location

If you have only one user location:

- After signing into the application, the Home page will display.
  - Your user location is automatically set.
- If Change Location link is clicked, the User Location page will display.
  - Click Select to set your user location and link to the Home page.

If you have more than one user location:
- After signing into the application, the User Location page will display
  - Click Select to set your user location and link to the Home page.
- If Change Location link is clicked, the User Location page will display.
  - Click Select to set your user location and link to the Home page.

*If you have more than one user location, always verify that the correct location is displayed in the top right corner of the screen under your name. If a record is created under the wrong user location, immediately notify SRTS Administration at SRTS@dmh.lacounty.gov.

III.   Searching for a Client

From the **Home** page, select the **Create Service Request** button.

Client Search

Once you select the **Create Service Request** button, you will be routed to the **Client Search** screen.

In the **Client Search** screen, you will have the option to search for a client by entering the client's IS or IBHIS Number in the Client Identifier field, their Social Security Number in the SSN field, or the client's First Name, Last Name, and DOB in the Advanced Search.
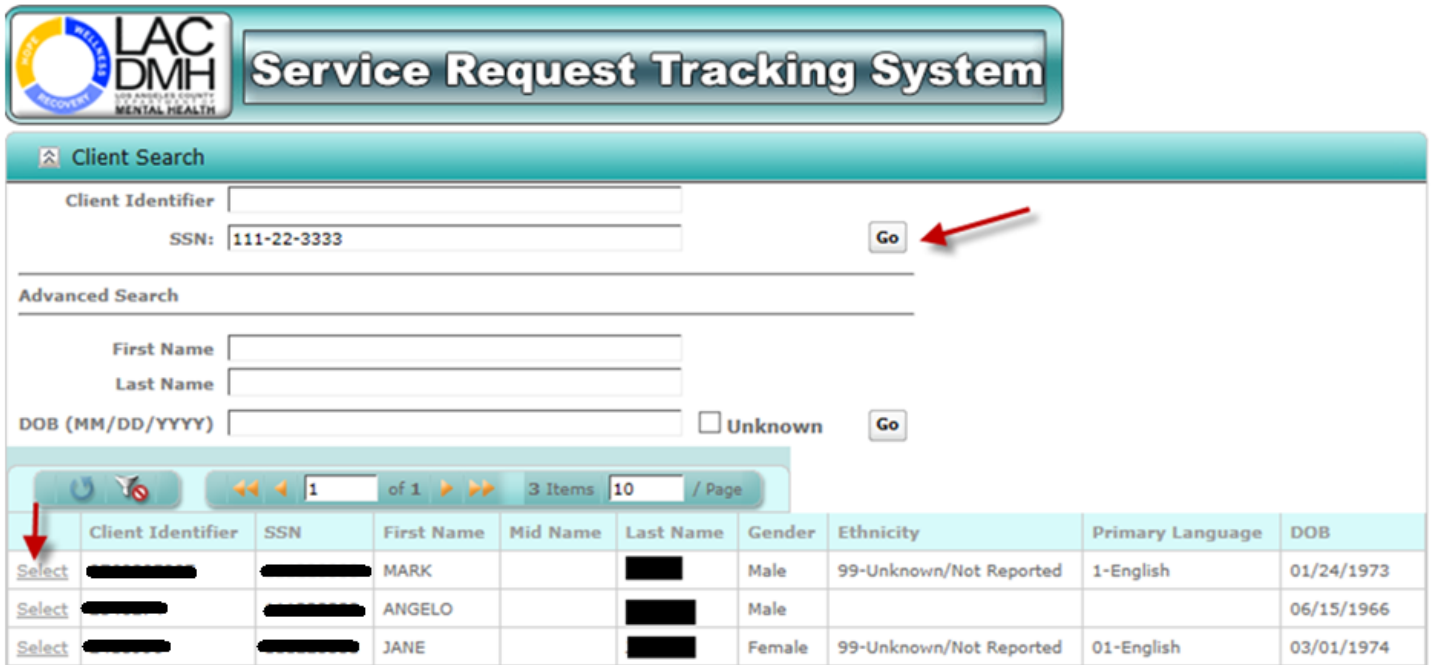
   Note: To reset the search, click the   icon

Search for a client by entering a Client Identifier or SSN and click the [> Go] button.

The client search results will be displayed.

Client Advanced Search

Search for a client by entering the client's First Name and Last Name and click the [> Go] button.

The client search results will be displayed.

Note: For an exact match, First Name, Last Name and DOB are mandatory.

Click Unknown for system default to 02/22/1922.

If the client you are searching for is not found, then the client does not exist in IS or IBHIS and the **Proceed** button will be displayed.

To create a Service Request on a client that does not exist, click the **Proceed** button and you will be routed to the Client Information screen. You must enter *First Name, Last Name* and *DOB.*

Client Information Screen
Once the client is selected, you will be routed to the Client Information screen, which lists the Service Requests and Episode history. The following information will be displayed:

- Client Demographic Information

- Existing Service Request

- Open and Closed Episodes

See Service Request and Episode detail by clicking the 🔍 View icon.

If the client does not have an active service request, the **Click here to create Service Request** button will be displayed.

If the client has an active service request ("active" means a prior record does not have a disposition), the **Click here to create Service Request** button will not be displayed.

> Q: What should I do if I need to create a record, but the client has an active Service Request?
>
> A: In order to create a service request, the active request must first be:
>
> > (1) Closed (given a disposition) by the agency that is currently assigned to the record, or
>
> > (2) Transferred to your agency so you can enter the disposition.
>
> Whether you request that the agency does option #1 or #2 depends on whether your record is related to the initial request by the other agency.
>
> Example: Were you able to see the client sooner? If so, it should be transferred. Is the active record from an inquiry last year that the agency failed to close? They should enter the disposition. Use the "Search for Program Contact" button on the home page to obtain the e-mail addresses of users of the record. E-mail SRTS@dmh.lacounty.gov if you cannot resolve an active service request issue on your own.

Service Request Tracking System

Client Information

Client Identifier

First Name   Last Name   DOB

Gender   Ethnicity   Preferred Language

Service Request		
◄◄ ◄ 1 of 1 ► ►►	3 Items	10 / Page
Service Request Date	Date of Initial Appointment	Provider # Associated with Initial Appointment
🔍		
🔍		
🔍		

Episode				
◄◄ ◄ 1 of 1 ► ►►	7 Items	10 / Page		
Episode	Admit Date	Discharge Date	SFPR Provider Name	Last Service Date
🔍				
🔍				
🔍				
🔍				
🔍				
🔍				
🔍				

Client has an active Service Request. Please click here for additional information.

[Home]

To proceed with creating the Service Request, click the **Click here to create Service Request** button. You will be routed to the **Add Service Request** page to enter the request information.

[Click here to create a Service Request]

IV.   Adding a Service Request

The following fields are pre-populated and cannot be modified:

- Medi-Cal Status (currently inactive)
- First Name
- Last Name
- DOB
- Responder Location

The following fields are **required** when creating the initial service request:

- Gender
- Ethnicity
- Preferred Language
- Staff Responding to Request
- Request Date
- Request Type
- Released From
- Warm Hand-off (only for **DMH/DHS Collaboration Program** staff)
- Request Received From:
  - Role of Referrer
  - Referral Source (only for ACCESS Center 855 Line)
  - Urgent Referral? (only for ACCESS Center 855 Line)
  - Name of Referrer (if not Self)
  - Referring Clinic (if Health or Mental Health Provider)
  - Health Plan (only for ACCESS Center 855 Line)

- "Is the client/potential client aware of request?" is required when Role of Referrer is other than Self.
- "Is the client/potential client currently receiving mental health services?" When "Yes" is selected "Agency Name" is also required.
- "Emergent Medication Needs?" When "Undetermined" is selected "Reason" is also required.
- When Disposition is "Assessment appointment given at site" and "Did individual accept first offered appointment?" is "No" then "First scheduled appointment date" and "Time" are required.
- When Disposition is "Assessment appointment given at site" and "Emergent Medication Needs?" is "Yes" then "Was the medication appointment scheduled for the same day as the first scheduled appointment?" is required.
- When "Was the medication appointment scheduled for the same day as the first scheduled appointment?" is "No" then "Justification" is required.

SRTS Fields:

Client Identifier
This field is pre-populated with the IS or IBHIS ID if the client is selected from the client search.

First Name, Last Name, DOB
These fields are pre-populated when the client is selected from the client search.

Gender, Ethnicity, Preferred Language
These fields are pre-populated when the client is selected from the client search. If the fields are blank or incorrect, the user is able to select the appropriate option from the drop-down menu.

Client Phone Number
Enter the client's phone number if it is available.

Insurance
Select from a drop-down list for Indigent, Medi-Cal, Medi-Medi, Medicare, Private Insurance, Unknown

Legal Guardian Name, Phone and Preferred Language
These fields are optional, but recommended, when Minor/Legal Guardian is not the referring party.

Staff Responding to Request
This field will default to the Full Name of the person entering the request. If this is not the staff responding to request, then enter that person's name instead. This is a free text field.

Responder's Location
This field will show the location of the staff responding to the request so that the users and the system administrators know at which location the record was created. The field is pre-populated based on the user's signed-in location and cannot be modified by users.

Request Date/Time
The date of the request for service is required. The time of request field is an optional field. These fields may be modified until Disposition of Request for Service is saved.

> The Department is required to report how long it takes an individual to access services after their first request to the DMH system; the Request Date is what starts the "clock."

Request Type
Did the client initiate contact by a Call, Walk-in, In Writing or Condition of Release/Discharge?
- "In writing" is often a referral
- "Condition of Release/Discharge" is to be selected when the record is being created on behalf of an individual due to routine discharge planning requirements, and not as a result of the request coming via phone call, walk-in or in writing.

Released From
Select Jail, Juvenile Justice or Inpatient if the request for service was made as a result of being discharged by any of the three entities. Select NA if not applicable.

Selecting Jail, Juvenile Justice or Inpatient triggers the 5-day urgent appointment clock and displays the Release/Discharge Date.

Warm Hand-Off
This option can be edited by DMH Collaboration staff only.

Release/Discharge Date
This is the date that the client was released/discharged from jail, juvenile justice, or hospital, if it is *after* the Request Date. This is an optional field and can be modified until a Disposition is saved. When entered, the number of business days until first appointment is calculated using the "Release/Discharge Date" instead of the "Request Date."

If the "Release/Discharge Date" is earlier than the "Request Date", an error message will be displayed.
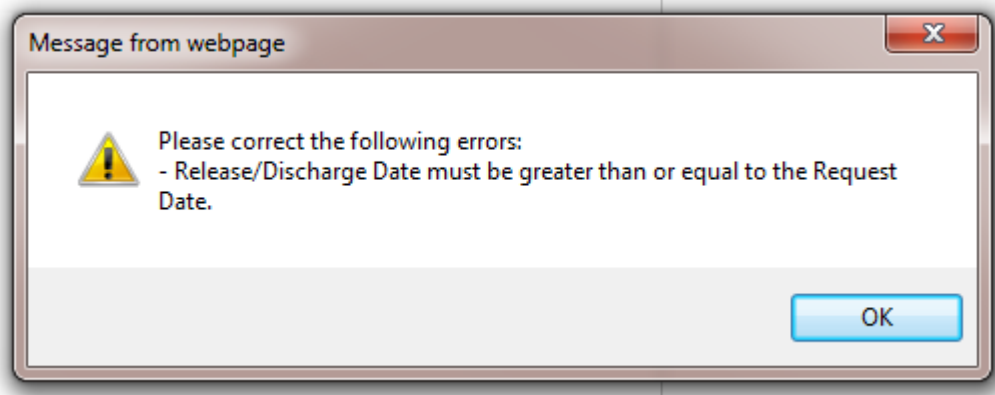
Reason for Request: Include a brief description of why a request for service is being made. Maximum number of characters is 255.

Request Received From: This section is used to record how the mental health system was made aware of the request for service. DO NOT enter the SRTS user's information, which is already collected based upon the user's log-in. This field is to log how the SRTS user was made aware of the request.

Role of Referrer
Select the Role of Referrer from the drop-down list.
- When "Role of Referrer" = "Self" then no other fields in the Requesting/Referring party section are visible or required.
- When "Role of Referrer" = "Mental Health Provider," "Collateral/Family Member," "DCFS," "Health Provider," "Inpatient Facility," "School," "Probation/Law Enforcement," "APS," "DPSS," or "Other" then the "Name of Referrer" and "Phone Number of Referrer" fields becomes visible and editable.
- When "Role of Referrer" = "Health Provider" or "Mental Health Provider" then the "Referring Clinic" field also becomes visible and editable.

Referral Source
Select the Referral Source from the drop-down list (only available if your user role name is ACCESS Center 855 Line)

Urgent Referral?
Click Yes or No. "Urgent Referral?" and Yes/No radio buttons (only available if your user role name is ACCESS Center 855 Line)

Health Plan
Select the health plan from the drop-down list (it is only available if your user role name is ACCESS Center 855 Line)

Name of Referrer
Enter the name of the referring person.

Phone Number of Referrer
Enter the phone number if it is known.

Referring Clinic
Enter the referring clinic, if known. If referred from a Primary Care Provider within the Department of Health Services network, use the Lookup option to select the clinic's name.

Is the client/potential client aware of request?
Select Yes or No from drop-down list.

**Is the client/potential client currently receiving mental health services?**
Select Yes, No or Undetermined from drop-down list. If "Yes" is selected, the Agency Name is required.

Emergent Medication Needs?
Select Yes or No. If you select Undetermined then you will have to enter a Reason why it is undetermined.

Attachment
Use this section to add and remove attached documents, (e.g., Screening or Referral form), into a Service Request record. These documents can be stored with the record, as well as be transferred to another entity with that record.
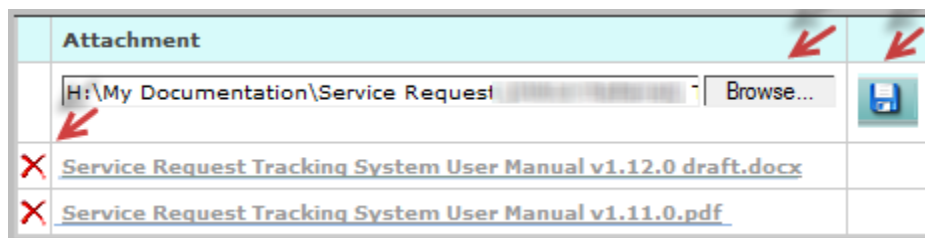
Click [Browse...] button to choose a file to upload. Click the desired file then click the Open button. This will link the file to the Attachment field. To save the attachment, click [ ] icon. To delete a file from the list, click [X] icon. Click the file's hyperlink to view the document.

Note: The application allows the following:
- *File type: Adobe Acrobat PDF, Microsoft Word, and Microsoft Excel*
- *File Size: Under 10 MB per file*
- *Number of Files: No more than 10 files per record*

Disposition of Request for Service
Select the disposition of the request for service.

If "Assessment appointment given at site" is selected from the drop-down, First Offered Appointment section must be filled in; otherwise, the First Offered Appointment section will be protected from input. Once disposition of request for service is entered and the request is saved, this field will no longer be updatable during an edit.

For DO, LE, SA or COL roles, if "Assessment appointment given at site" is selected from the drop-down, then the "Final Disposition" field will be enabled.

For ACCESS Center role, if "Assessment appointment given at site" for "Disposition of Request for Service" field, then the "Final Disposition" field will be disabled.

If "Assessment appointment given at site" is selected from the drop-down, then the field "Did individual accept first offered appointment?" will be visible and enabled. This is a Yes"or "No" drop-down field.
- When you select "No" for the question "Did individual accept first offered appointment?" then the "First scheduled appointment date" and "Time" fields will be visible and enabled.
- When you select "Yes" for the question "Did individual accept first offered appointment?" then the "First scheduled appointment date" and "Time" fields should not be visible.

Note: Once the disposition and/or First Offered Appointment have been entered and saved, fields may not be modified.
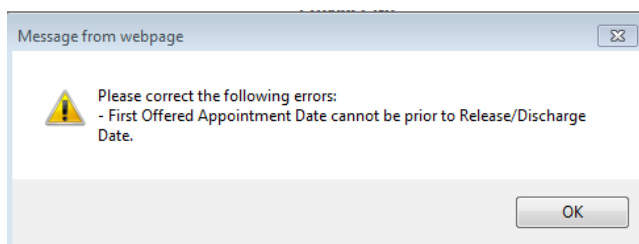
First Offered Appointment:

Date and Time
The First Offered Appointment "Date and Time" field will display the date and time of the first appointment offered to the client for a face-to-face initial assessment. This does not include triage, FSP Outreach & Engagement (O&E) or an appointment solely to complete administrative activities such as financial screening.

In the event that the client does not show to the appointment or reschedules the appointment, the original First Offered Appointment date and time should not be changed. The **only** instance the original appointment time should be modified is if the clinic has to reschedule the client. In that event, the SRTS user will need to e-mail SRTS@dmh.lacounty.gov so an Administrator can edit the record on their behalf.

If the "Release/Discharge Date" is entered, the First Offered Appointment Date cannot be before the "Release/Dishcarge Date." If the First Offered Appointment Date is before the "Release/Discharge Date," this error message will be displayed:

If the First Offered Appointment Date is more than 5 business days after the "Release/Discharge Date" for urgent referrals or more than 15 business days for routine referrals, this error message will be displayed:

"The date of the first offered appointment is more than 5 business days after the date of the "Release/Discharge Date." Please check the box to acknowledge and enter justification."

or

"The date of the first offered appointment is more than 15 business days after the date of the "Release/Discharge Date." Please check the box to acknowledge and enter justification."
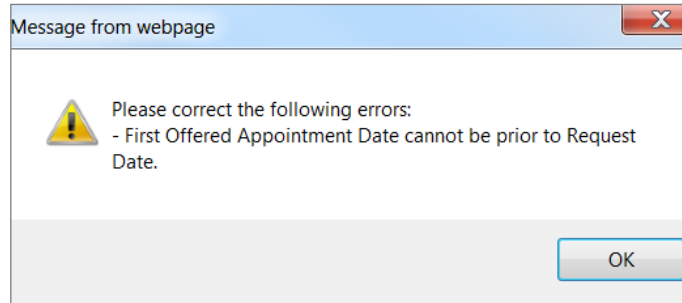
The user has to select "OK" then the following message with a checkbox will display. The checkbox must be checked off before proceeding with saving the request.

"The date of the first offered appointment is more than 5 business days after the date of the "Release/Discharge Date". Please check this box to acknowledge your understanding."
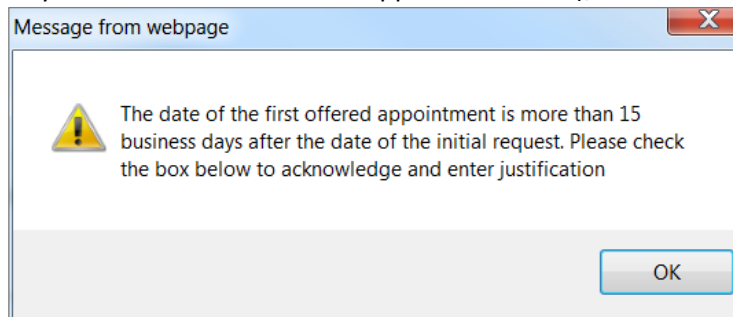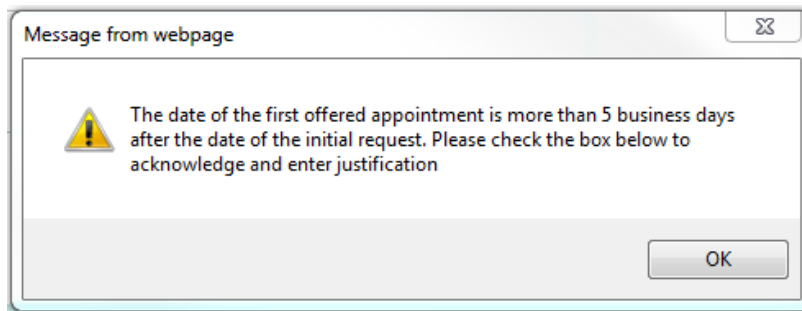
<div align="center">or</div>

"The date of the first offered appointment is more than 15 business days after the date of the "Release/Dishcarge Date." Please check the box to acknowledge your understanding."

If the First Offered Appointment Date is before the Request Date, an error message will be displayed.

If the date of **First Offered Appointment** is more than 15 business days after the referral date for routine referrals, or more than 5 business days after the referral date for urgent referrals (requests made at or before discharge from jail, juvenile justice, inpatient facility or via the ACCESS Center Appointment Line), an error message will be displayed.

<div align="center">or</div>

Click the **OK** button.

The following message with a checkbox will have been displayed. The checkbox must be checked off before proceeding with saving the request.

☐ The date of the first offered appointment is more than 15 business days after the date of the initial request. Please check this box to acknowledge your understanding.

<div align="center">or</div>

☐ The date of the first offered appointment is more than 5 business days after the date of the initial request. Please check this box to acknowledge your understanding.

Staff Responding to Request
This field will default to the Full Name of the person entering the request. If this is not the staff responding to request then enter that person's name instead. This is a free text field.

Responder's Location
This field will display the location of the staff responding to request so that the users and the system administrators know at which location the record was created. The field will be pre-populated based on the user's signed-in location and cannot be modified by users.

Provider Number Associated with First Offered Appointment
User can enter provider number or click on Lookup to find the provider name where the client will receive services.

Referred to
Where the client was referred to (this field is right under the Disposition of the Request for Service and is only available when the Disposition is "Does not meet program criteria," "Referral made for appropriate non-DMH service provider" or "Referral made to appropriate DMH service provider; unable to transfer record.")

Justification
This field is required for appointments that are over the allotted time frame.

First Scheduled Appointment Date and Time
When user selects "No" to the question "Did individual accept first offered appointment?" the date and time fields are required.

Comments, Cultural Considerations/Special Needs
The user can add any comments that are pertinent to the request. This field is also used to track the client's cultural considerations and special needs.

Users are able to add a single comment in the Add page with the ability to add multiple comments in Edit page. Once the record is saved, users will not be able to modify. On the show page, users can see the multiple comments in groups of five. Comments section should display the comments from most recent to oldest with navigation buttons to see the next five. Each comment will have the name of the user entering the comment, date and time stamp.
Note: Please remember that an Administrator cannot edit the comments that were entered by a user. Please be mindful of your entry prior to saving a record.
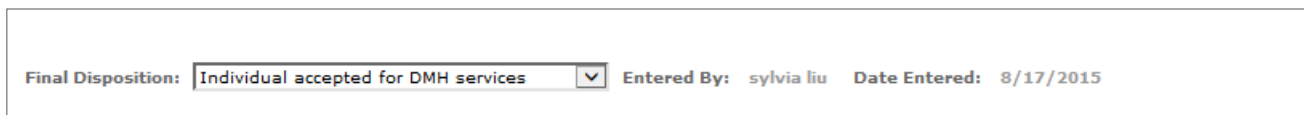
Final Disposition
The Final Disposition drop-down field is used to indicate the Final Disposition of the appointment.
For clinics and linkage providers only:

If "Assessment appointment given at site" is selected from the drop-down then the "Final Disposition" field should be enabled allowing you to select any of the following values:

1. Individual accepted for DMH services
2. Individual declined DMH services
3. Individual did not show for appointment
4. Individual does not meet program criteria
5. Program is unable to serve individual

Once you select a Final Disposition, the system will show the date the disposition was entered along with the name of the user entering it.

For ACCESS Center role only:
When you select the value "Assessment appointment given at site" for "Disposition of Request for Service" field then the "Final Disposition" field should be disabled.

Note: Once the Final Disposition has been entered and saved, fields may not be modified.

If users select and save a Final Dispostion that is not correct, they can e-mail SRTS@dmh.lacounty.gov so an Administrator can edit the record on their behalf.

Cancel
This will close the record without saving any changes.

Save
This will save the record and/or any changes. Press the Save button only *__once__* when saving; double-clicking the Save button could create duplicate records.

Transfer
Service Requests can be transferred to another SRTS user. Please see the ".   Transferring a Service Request" section for additional information.

V.   Service Request (Show Page)

Once the service request is saved, you will be routed to the **Service Request Tracking Confirmation** page. This page

will display the Tracking Confirmation # along with the request information. To print, click on the icon. Click the **Home** button to return to the **Home** page.

Service Request Tracking System

Service Request

Tracking Confirmation # 110549

Client Information

Client Identifier

First Name	User	Last Name	Manual	DOB	5/5/1955
Gender	Unknown	Ethnicity	Amerasian	Preferred Language	Afrikaans
Client Phone	(555) 555 -5555	Insurance	Unknown		

If Minor / Legal Guardian is not the referring party:

Legal Guardian Name	Legal Guardian Phone	Legal Guardian Preferred Language
Test	(555) 555 -5555	American Sign

Service Request Information

Staff Responding to Request	Jennie Ko	Request Date / Time	1/11/2017
Request Type	Call	Released From	NA

Reason for request

Responder's Location: Hollywood MHC – 1909

Current Location: Hollywood MHC – 1909

Request Received From:

Role of Referrer	Name of Referrer	Phone Number of Referrer
Collateral/Family Member	Test	(555) 555 -5555

Is the client/potential client aware of request? **No**

Mental Health Information

Is the client/potential client currently receiving mental health services? **No**

Emergent Medication Needs?   **No**

Attachments

Attachment

Disposition

Disposition of Request for Service:	Entered By:	Date Entered:
Referred To		

First Offered Appointment:

Date and Time	Staff Name	Provider No. Associated to Appointment	Justification:

Did individual accept first offered appointment?   First scheduled appointment date and time:

View Comment History

	0	of 0	10	/ Page

Comment ID	Date and Time Entered	Entered By	Comments

View Transfers

	0	of 0	10	/ Page

Transfer ID	Transfer Date

Created By	Jennie Ko	Date Created	1/13/2017 1:29 PM
Last Modified By		Date Modified	

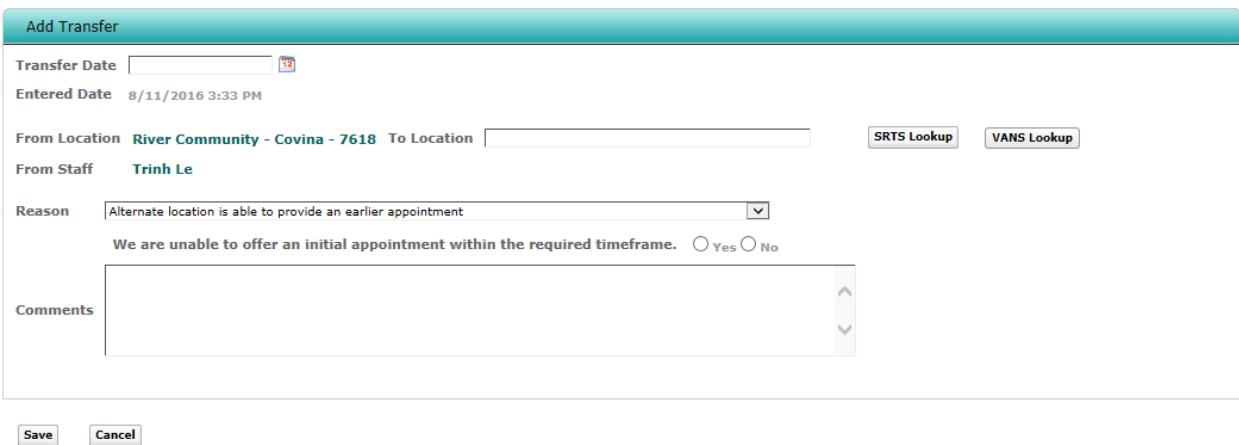Home

VI. Transferring a Service Request

On both the Add Service Request and Edit Service Request page, there is an option to transfer the service request to a Service Area Navigator or Legal Entity or Directly-operated site.

If working on the Add Service Request page, the required information must be entered before the transfer will proceed.

Click the Transfer button.

This will cause the Transfer section to to open in a new window.

Once in the Transfer section:

Enter the Transfer Date. This is the date the record is being transferred to another provider. However, if the record is in the FSP Authorization process, then it is the date of the actual request or authorization and can be backdated if needed.

Click the SRTS Lookup button to search for your provider by name or provider number and select the Location where the referral is being Transferred To.

If the location is unknown, click the VANS Lookup link to search for DMH services, programs or facilities serving the client's area. VANS will open in a new browser window. Enter the client's address and filter for the age of the client, type of services needed, insurance and language spoken. VANS will display providers closest to the client and show whether they are taking new clients. This information is updated by the outpatient providers'; be sure to check the Last Modified date to ensure the information is current. Once a location has been identfied, go to the SRTS Transfer window, click on SRTS Lookup and enter the provider name or number.

Once the location is selected, a reason for the transfer must be indicated and any comments associated with the transfer may be added.

When Transfer Reason "Alternate location is able to provide an earlier appointment" is selected from the drop-down, the message "We are unable to offer an First Offered Appointment within the required timeframe" with Yes/No radio buttons will display. **A response is required.**

If you have a Directly-operated or Legal Entity role, when Transfer Reason "This program is unable to serve the individual. Please select the reason and explain in Comments section." is selected from the drop-down, **a response is required.**

Select a Response from the following drop-down values**:**
- Not accepting clients at this time
- Individual does not meet program criteria
- Other (please explain in Comments section)

Click the **Save** button. This transfers the record to the new location. The "From Location" can no longer edit the record.

Service Request Transfer E-mail Notification
Once the service request has been transferred, the system will generate an e-mail to all the staff at the location where the service request was transferred to.

The staff person making the service request transfer will also receive the e-mail notification. The e-mail will include the service request confirmation # for reference and the hyperlink to the service request confirmation page.

Note: Staff at the Transfer To location may edit the service request by following the link on the e-mail notification.
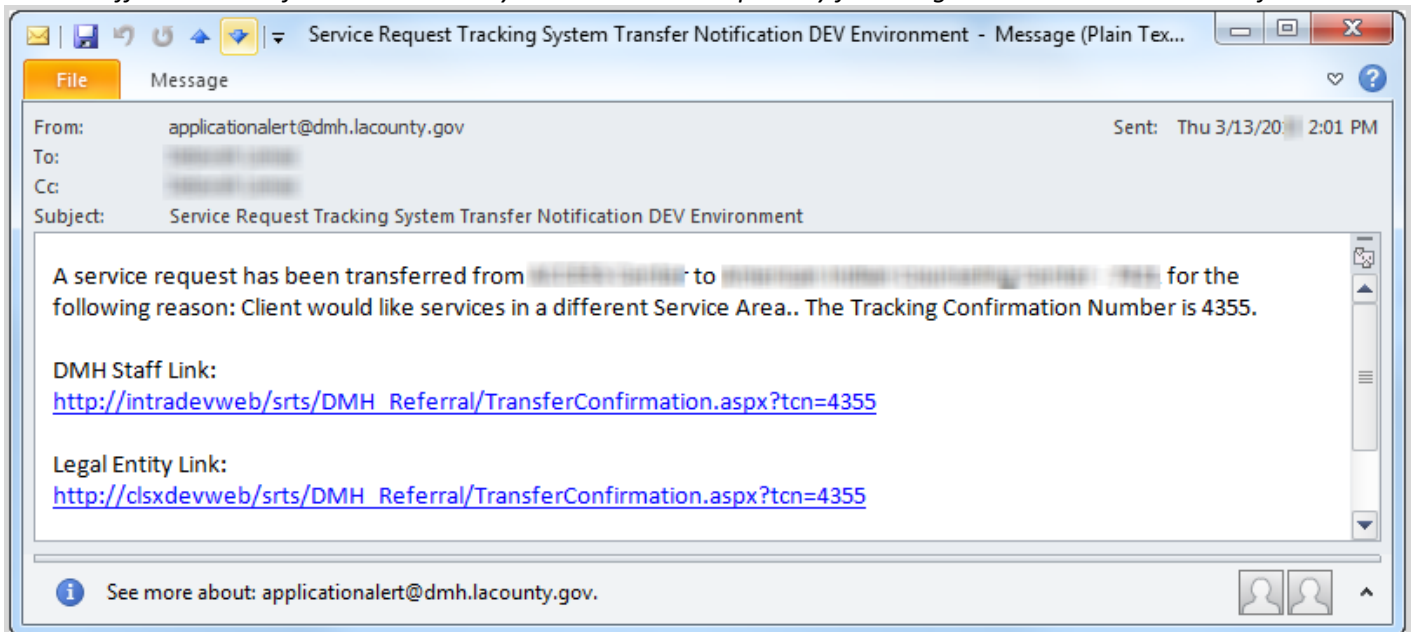
If the staff making the transfer realizes it was made to the incorrect location, click Reply All to the E-mail Notification, copy SRTS@dmh.lacounty.gov, and notify the staff at the "To Location" to disregard the request and ask that SRTS Admin delete the transfer so that the user can transfer again to the correct location.

Receiving a Service Request Transfer
From the **Home** page, click the **Edit Service Request by Confirmation #** button and enter the service request confirmation # listed on the e-mail notification.

You will be routed to the **Edit Service Request** page where you can edit Disposition of the service request.

Note: Since the referral has been transferred, the Client Information and Service Request Information sections may not be edited.

Service Request Tracking System

Edit Service Request

Client Information

Client Identifier

First Name User   **Last Name** Manual   **DOB** 5/5/1955

Gender Unknown   **Ethnicity** Amerasian   **Preferred Language** Afrikaans

Client Phone (555) 555 -5555   **Insurance** Unknown

If Minor / Legal Guardian is not the referring party:

Legal Guardian Name   **Legal Guardian Phone**   **Legal Guardian Preferred Language**

Test   (555) 555 -5555   American Sign

Service Request Information

Staff Responding to Request Jennie Ko   **Request Date** 1/11/2017   **Time**

Request Type Call   **Released From** NA

Reason for request

Responder Location   Hollywood MHC – 1909

Request Received From:

Role of Referrer	Name of Referrer	Phone Number of Referrer
Collateral/Family Member	Test	(555) 555 -5555

Is the client/potential client aware of request? No

Mental Health Information

Is the client/potential client currently receiving mental health services? No

Emergent Medication Needs? No

Attachment
[ ] Browse... 💾

Disposition

Disposition of Request for Service ** Please Select **

Add Comment History

Comments

View Comment History

[X] ◄ 0 of 0 ► 10 / Page

Comment ID	Date and Time Entered	Entered By	Comments

View Transfers

[X] ◄ 1 of 1 ► 10 / Page

Transfer ID	Transfer Date
51819	**Transfer Date** 1/12/2017
	Entered Date 1/13/2017 1:36 PM

From Location Hollywood MHC – 1909   **To Location** Service Area 4 Adult Navigation Team - FSP

From Staff Jennie Ko   [ ] **VANS was used**

Transfer By Jko

Reason Request for services

Comments Referring client to FSP.

Created By Jennie Ko   **Date Created** 1/13/2017 1:29 PM

Last Modified By   **Date Modified**

[Save] [Cancel] [Transfer]

VII.   Search for Existing Service Request
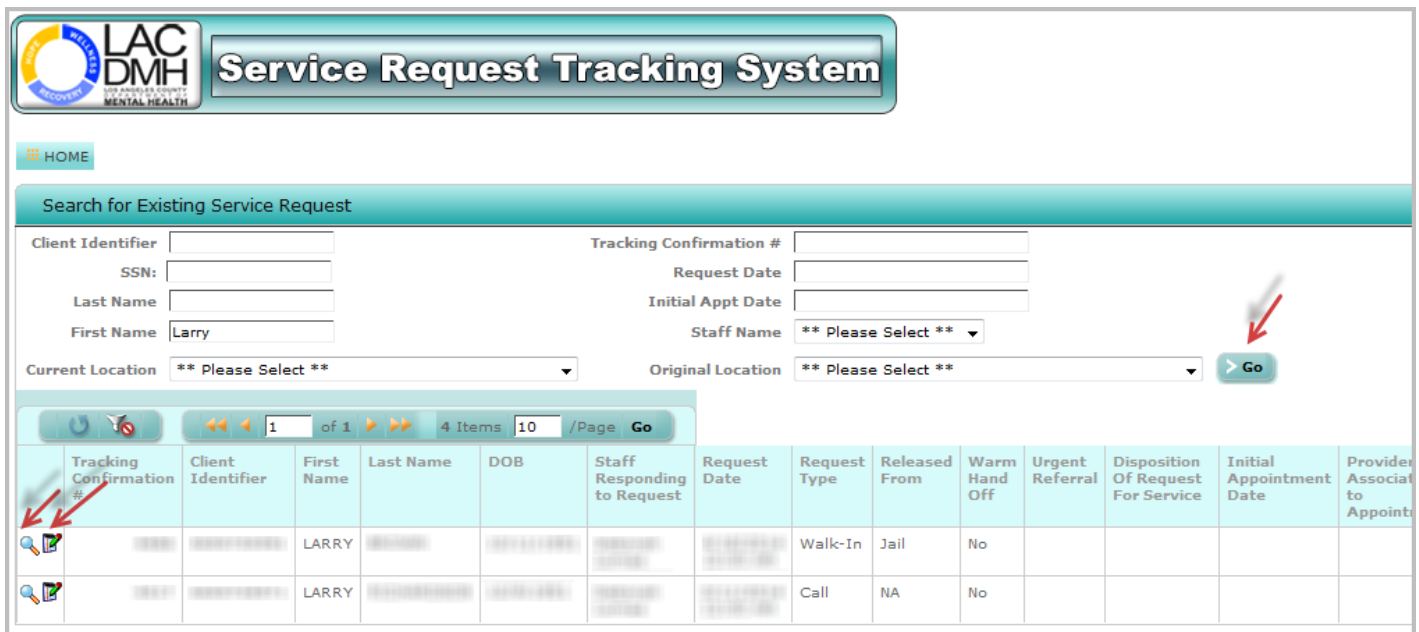
From the Home Page, select Search for Existing Service Request button.
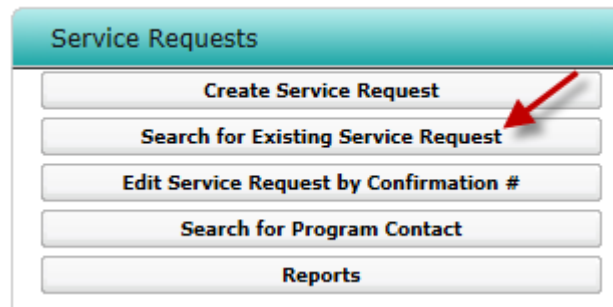
To aid the **Search for Existing Service Requests**, you have the option to search by Client Identifier, Tracking Confirmation #, SSN, Request Date, Client's Last and First Name, First Offered Appointment Date, Staff Name, Current Location (**view referrals for your assigned location**), and Original Location. Once record is saved staff name will lock not allowing you to modify it anymore.

Note: Staff within the same location can view and edit each other's service requests. Requests created in a different location can only be viewed.

To search for an existing service request by the client's first and last name, enter the information and click the button. The service request for the client will be displayed.

To view the service request, click on the 🔍 icon. You will be routed to the **Service Request Tracking Confirmation** page.

Note: You may edit the service request for your assigned location by clicking on the 📝 icon.

VIII. Edit Service Request by Confirmation

From the **Home Page**, click **Edit Service Request** by **Confirmation #.**
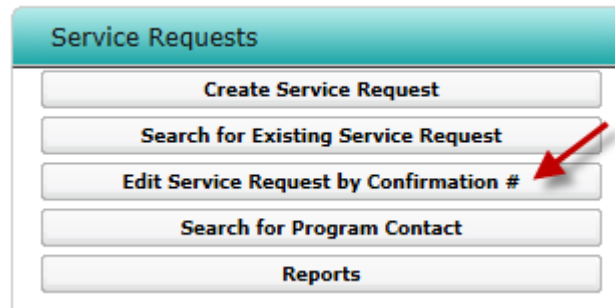
You will be routed to the **Edit Existing Service Request by Confirmation Number** page.

Enter the Service Request Tracking Confirmation # then click the [> Go] button.
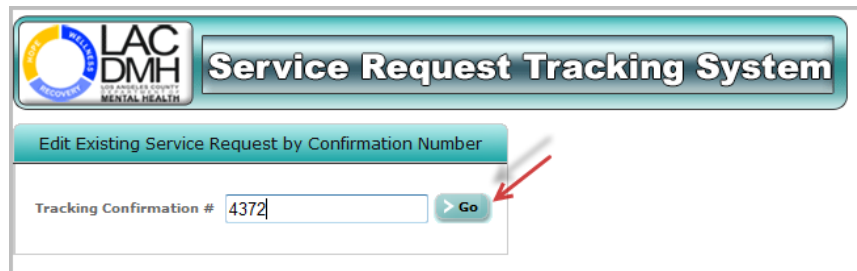
You will be routed to the **Edit Service Request** page. Edit the service request and click the **Save** button.

Note: Once the Disposition of Request for Services and First Offered Appointment Date and Time have been entered and saved, they may not be modified.

The Edit Service Request page displays the following additional fields that are not editable:

Created By
First Name and Last Name of the person that saved the original service request.

Date Created
Date and time the original service request was first saved.

Last Modified By
First Name and Last Name of the person that last saved the service request after it was created.

Date Modified
Date and time the service request was last saved while being modified.

Once the service request has been saved, you will be routed to the **Service Request Tracking Confirmation** page and the new information entered will be displayed. Click the Home button to return to the Home page.

Service Request Tracking System

Service Request

Tracking Confirmation # 110549

Client Information

Client Identifier

First Name	**User**	**Last Name**	**Manual**	**DOB** 5/5/1955
Gender	**Unknown**	**Ethnicity**	**Amerasian**	**Preferred Language** **Afrikaans**
Client Phone	**(555) 555 -5555**	**Insurance**	**Unknown**	

If Minor / Legal Guardian is not the referring party:

Legal Guardian Name   **Legal Guardian Phone**   **Legal Guardian Preferred Language**

Test   **(555) 555 -5555**   **American Sign**

Service Request Information

Staff Responding to Request	**Jennie Ko**	**Request Date / Time**	**1/11/2017**
Request Type	**Call**	**Released From**	**NA**

Reason for request

Responder's Location: **Hollywood MHC - 1909**

Current Location: **Service Area 4 Adult Navigation Team - FSP**

Request Received From:

Role of Referrer	**Name of Referrer**	**Phone Number of Referrer**
Collateral/Family Member	**Test**	**(555) 555 -5555**

Is the client/potential client aware of request?   **No**

Mental Health Information

Is the client/potential client currently receiving mental health services?   **No**

Emergent Medication Needs?   **No**

Attachments

Attachment

Disposition

Disposition of Request for Service: Unable to reach individual/collateral   **Entered By:**   **Jennie Ko**   **Date Entered:**   **1/13/2017 1:41 PM**

Referred To

First Offered Appointment:

Date and Time	**Staff Name**	**Provider No. Associated to Appointment**	**Justification:**

Did individual accept first offered appointment?   **First scheduled appointment date and time:**

View Comment History

	of 0	10	/ Page

Comment ID | Date and Time Entered | Entered By | Comments

View Transfers

1 of 1 10 / Page

Transfer ID	Transfer Date
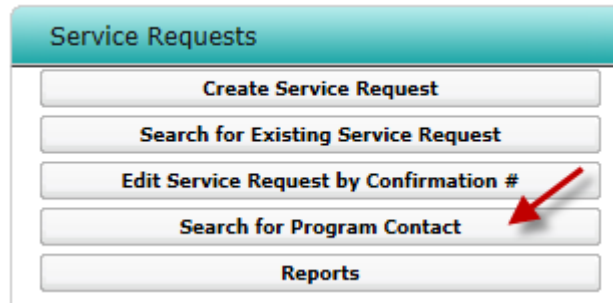
51819	**Transfer Date** 1/12/2017
	Entered Date 1/13/2017 1:36 PM
	From Location **Hollywood MHC - 1909** **To Location** **Service Area 4 Adult Navigation Team - FSP**
	From Staff **Jennie Ko** ☐ **VANS was used**
	Transfer By **Jko**
	Reason **Request for services**
	Comments Referring client to FSP.

Created By   **Jennie Ko**   **Date Created**   **1/13/2017 1:29 PM**

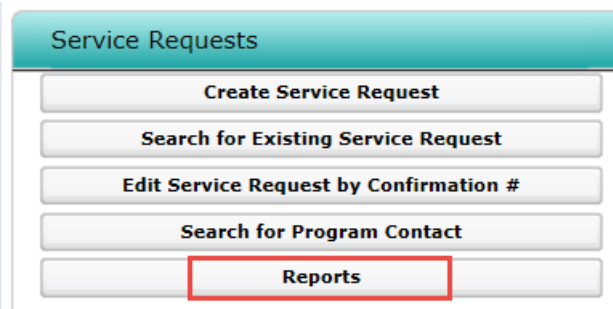**Last Modified By**   **Jennie Ko**   **Date Modified**   **1/13/2017 1:41 PM**

Home

IX.   Search for Program Contact

Enter the first couple of letters of a program name to bring up a list to select from and click on the button.

X.   Reports

Once you select the Reports button, you will be routed to the Internet Reports Application. A dialogue box will prompt you to enter your RSA SecurID and IS Password to access.

After credentials are entered, click on "DMH Contract Providers" on the top row header then choose the SRTS Detail Report or SRTS Original Location Report.

Enter the desired date parameters.

Enter the password that was given to you by SRTS Admin.

Select "Excel 2007" from the Report Output Type drop-down.

Click "SHOW REPORT" and the report will open in Excel.

XI. SCHEDULING MODULE

Purpose of the SRTS Scheduling Module
The purpose of the scheduling module is to provide Legal Entity contract providers the ability to add or update appointment slots in their own SRTS calendars. ACCESS Center users can then search, locate and book appointments in available slots, thereby streamlining the process of scheduling appointments between the ACCESS Center and the Legal Entities to ensure that clients receive the care they need as soon as possible.

Accessing the SRTS Scheduling Module
The only users that can access the SRTS scheduling module are those associated with a Legal Entity or the ACCESS Center. All other user types do not have access to the scheduling module.

Legal Entities Adding Appointment Slots
When a Legal Entity user logs into SRTS they should see the "Scheduling" tab on their home page. Located below that tab is a link called "Calendar for ACCESS Appointments." Here is a screen shot:
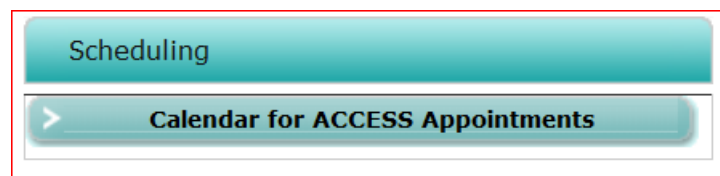
Once you click on the "Calendar for ACCESS Appointments" link, you will be directed to the "Calendar View" of your location. If you have more than one user location, verify that the correct location is displayed on the upper right corner under your name.

Here is a screen shot of the user name and the signed-in location on the upper right corner of the screen:
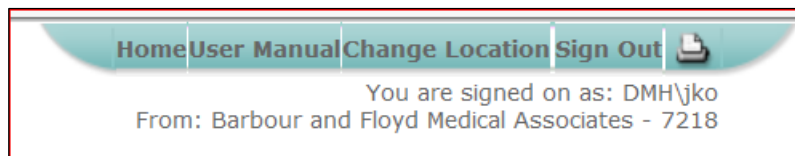
The calendar has the following view capabilities: daily, weekly and monthly. Here is a screen shot of the calendar's weekly view. Notice that the address of the location you are signed into displays right below the name of the provider:
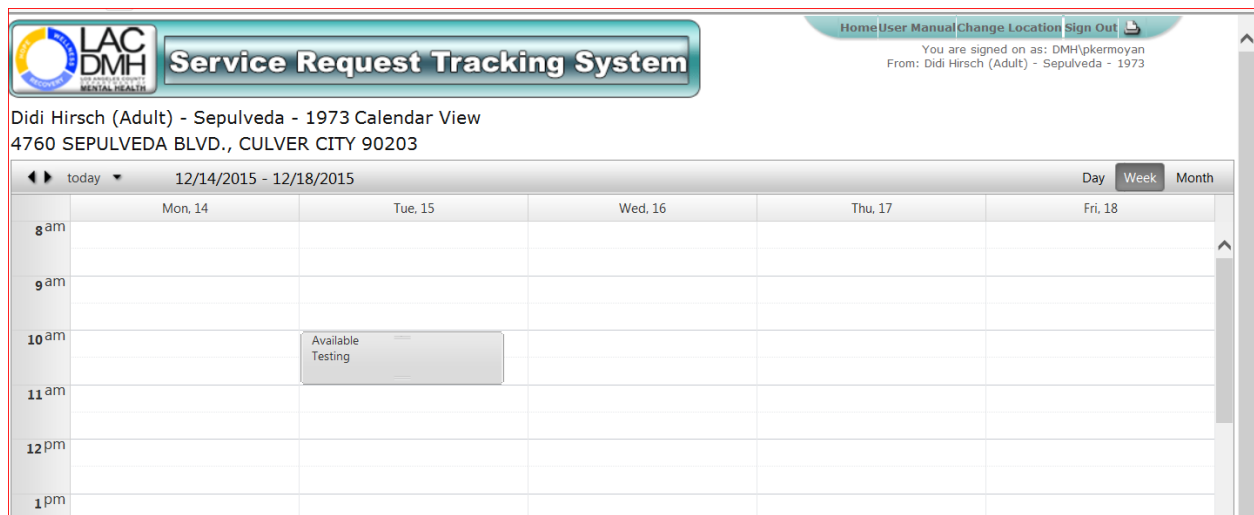
To add an appointment to the calendar, double-click on the time slot you want to add and the following pop-up will display:

The "Subject" field is prepopulated with the word "Available" and is grayed out for Legal Entity users; however, ACCESS Center users have the ability to edit it once they choose to save it.

There are three fields that are required in order to save the appointment a Legal Entity user is trying to add. If a Legal Entity user tries to save the appointment without entering data in these three fields, they will be prompted to do so. The three fields are:

1. Clinic Contact Person
2. Language
3. Age Group

Once a Legal Entity user has populated the required fields and clicked "Save," the appointment will show up on their calendar. If they click "Cancel," it will simply cancel the selection.

Legal Entities can add comments that are going to be visible to the ACCESS Center users.

Legal Entities can also set up recurring appointments. When a Legal Entity user checks the "Recurrence" check-box, the pop-up will expand. This section allows Legal Entities to set up recurring appointments in multiple ways. Here is a screen shot of what appears after checking the "Recurrence" box:

Once a Legal Entity user makes their selections and clicks "Save," all of the appointment recurrences will show up in the calendar. If they click cancel, it will simply cancel their selection.

To safeguard the booked appointments, Legal Entities cannot delete those appointments that are booked by ACCESS Center users.

ACCESS Center Users Searching and Locating Appointments
When ACCESS Center users log onto the SRTS, they should see the "Scheduling" tab on their home page. Located below that tab is a link called "Search for Appointments." Here is a screen shot:
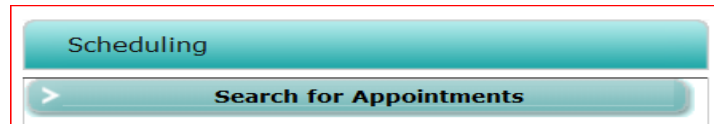
Once you click on the "Search for Appointments" link, you will be directed to the "Search Appointments" page. If you have more than one user location, verify that the correct location is displayed on the upper right corner under your name. Here is a screen shot of the user name and the signed-in location on the upper right corner of your screen:
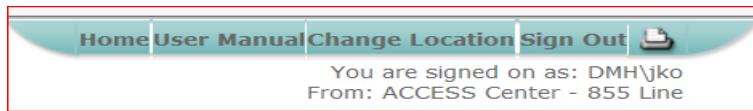

Here is a screen shot of the "Search Appointments" page:

It is on this page that ACCESS Center users can search for appointment slots that are added by the Legal Entities; however, they have to enter search criteria first. Users can narrow down their search by selecting any of the following criteria:

1. Date range. When the user clicks in the "Appointment Date" fields, a calendar will pop up from which the user can select a date; that date will populate the field.
2. Language. Users can select from a list of 13 languages.
3. Age group. Users can select from a list four age groups.
4. Appointment Status. Users can select "Available" or "Booked."
5. Provider Location or Client Address. Users cannot search by both criteria simultaneously.
   If the "Client Address" field is populated with a client address, then the "Location" field will not populate with the data that the user selects from the "Lookup" link.

If user selects "Location" first and then adds the client address, the search will default to the client address.

To select a location of user's choice, the user should click on the "Lookup" link. A window will open up allowing the user to search for location by provider name and provider number. Here is a screen shot of the "Location" search window after clicking the "Lookup" link:
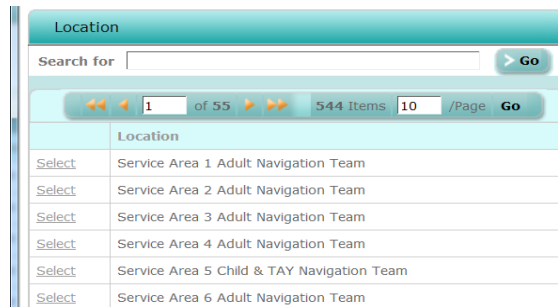
Once you find your location and click "Search," you will only see the available appointments for that specific location. You can select an appointment you want to save by clicking the "Edit" icon on the left side of the result.
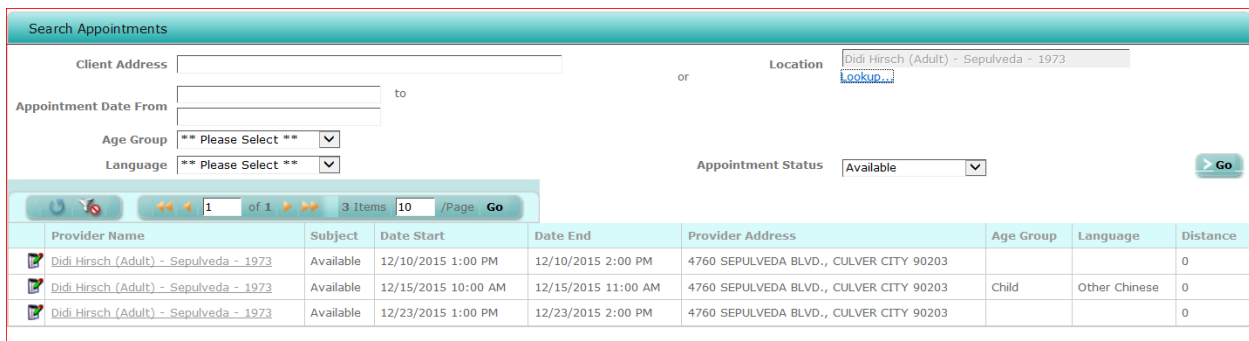
However, if you are searching by client address, the results table will display the distance from that specific location to the client's address; results default closest to farthest.
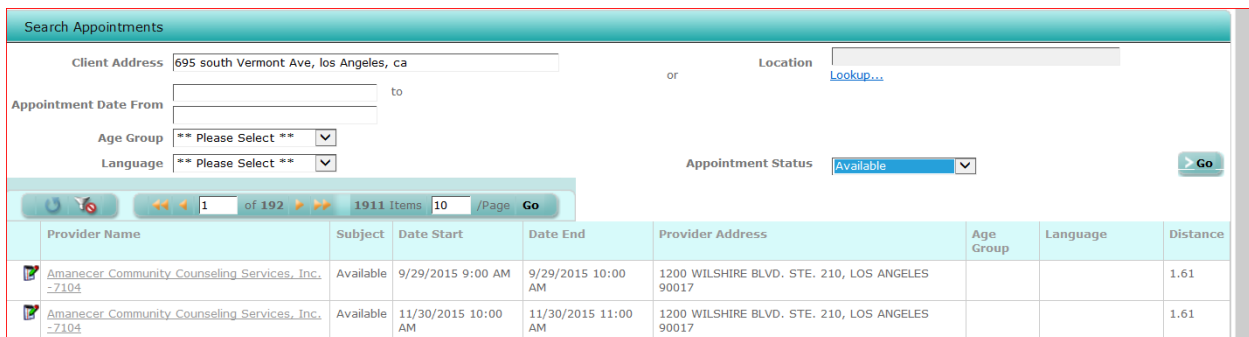
ACCESS Center Users Booking Available Appointments
To book an appointment click on the "Edit" icon located on the left side of the available appointment.

Notice that the name of the provider your search will yield is a link; when you click on it, you will be directed to the calendar of that provider where you can view appointments and navigate on the calendar.

Please note that booked appointments will display without the edit icon because you cannot edit them. It is just a way for the user to click on the link of the provider and view the booked appointment on the provider's calendar.

Here is a screen shot of how booked appointments will display in the results:

	Didi Hirsch (Adult) - Sepulveda - 1973	Cindy	12/9/2015 10:00 AM	12/9/2015 11:00 AM	16111 S CLARK ST, BELLFLOWER 90706	Child		0

Here is a screen shot of how available appointments will display in the results:

	Didi Hirsch (Adult) - Sepulveda - 1973	Available	12/15/2015 10:00 AM	12/15/2015 11:00 AM	4760 SEPULVEDA BLVD., CULVER CITY 90203	Child	Other Chinese	0

Once you click the "Edit" icon, you will be directed to the "Book New Appointments" page. Here is a screen shot of the "Book Appointment" page:
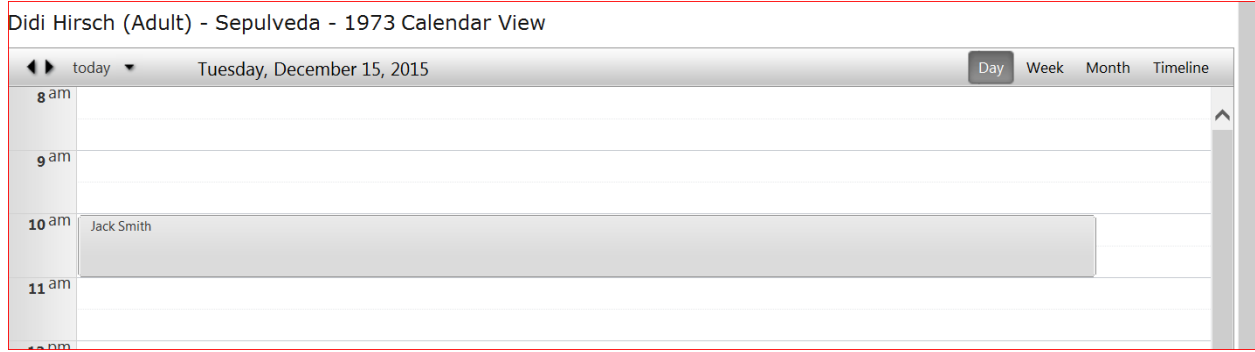
Book Appointment	
Location	Didi Hirsch (Adult) - Sepulveda - 1973
Subject	Available
Date Start	12/15/2015 10:00 AM **Date End** 12/15/2015 11:00 AM
Age Group	Child
Languages	Other Chinese
Comments	Testing
Clinic Contact Person	Paylig

> Cancel   > Save

When booking an appointment, remember to change the "Subject" line to be a client's name. If you click "Save" without changing the subject, you will receive a pop-up reminding you to change it. You cannot book your appointment until you change the subject:

Message from webpage

⚠ To save an appointment Subject line has to be a client's name.

OK
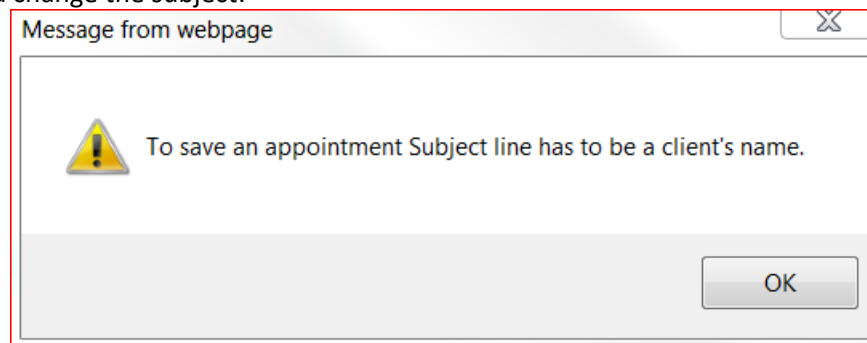
Once you click "Save," you will be directed to the calendar of the provider where the client is scheduled for an appointment. You will have read-only rights on that calendar. This will be your confirmation of your booking process. The calendar provides the option of clicking the "Home" button to take you to the "Home" page or clicking the "OK" button to take you to the "Search Appointments" page.

Here is a screen shot of the confirmation for a client:

Didi Hirsch (Adult) - Sepulveda - 1973 Calendar View

If you choose to cancel your selection and not book that appointment, then simply click "Cancel" and you will be directed to the "Search Appointments" page.

To safeguard appointments, the system will not allow you to book an appointment that is already booked. You will receive a pop-up telling you that the appointment is already taken. This is useful when two users have the same appointment selected to be booked and one user selects it before the other.