



Division of Public and Behavioral Health Policy

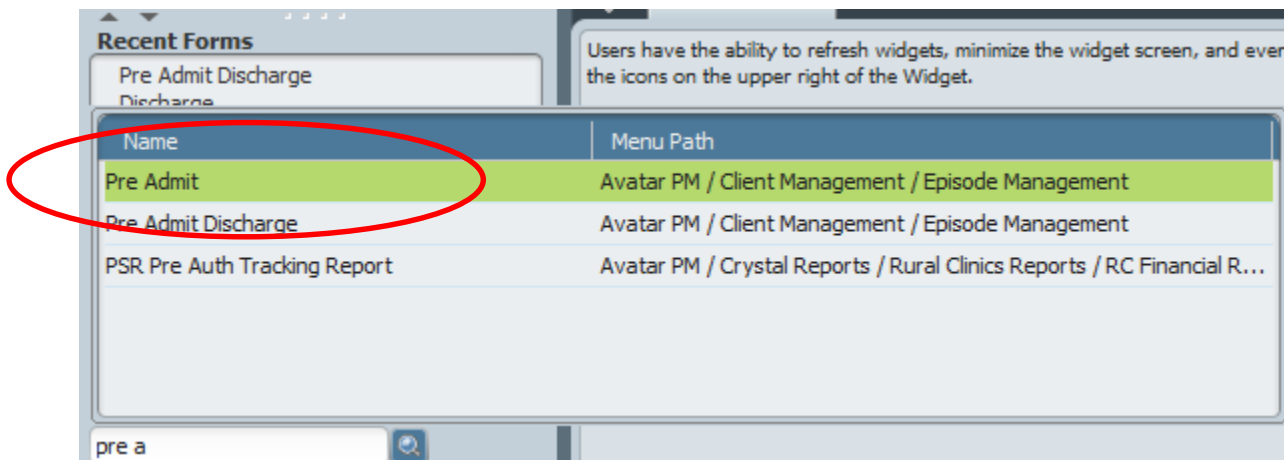
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1.0 Policy

It is the Policy of the Division of Public and Behavioral Health (DPBH), Substance Abuse, Prevention, and Treatment Agency (SAPTA) that all providers, in accordance with 505 (a) of the Public Health Service Act (42 US code 290aa-4) which directs the Administrator of the Substance Abuse and Mental Health Services Administration (SAMHSA), to collect items including admission and discharge data.

2.0 Procedure

1. Type **Pre-Admit** in the Search Forms field.
 - a. A selection menu will appear.



2. Select the **Pre-Admit** form by double clicking on it from the selection menu.
 - a. The select client screen will appear.
3. Enter at least three of the following options into the select client window.
 - a. Last Name
 - b. First Name
 - c. Sex
 - d. Social Security #
 - e. Date of Birth.
 - f. The following information is recorded in their respective fields.



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The screenshot shows the 'Select Client' dialog box with the following fields: Last Name, First Name, Sex, Social Security #, Date of Birth, Facility Chart #, and PATID. Below the fields are buttons for Search, Clear, and View Client History. A table with columns S..., Name, ID, Social Se..., Facility C..., Date Of..., and Client's A... is visible below the buttons. At the bottom are buttons for Select, New Client, and Cancel.

- g.
4. Click the Search button.
 - a. If the client appears, click on the green box with their name.
 - b. Otherwise, the Search Results text box will appear and state “No matches found.”
5. Click the OK button within the Search Result text box.

The screenshot shows the 'Select Client' dialog box with the following fields: Last Name (SAPTA), First Name, Sex (Male), Social Security #, Date of Birth (10/24/1961), Facility Chart #, and PATID. Below the fields are buttons for Search, Clear, and View Client History. A table with columns S..., Name, ID, Social Se..., Facility C..., Date Of..., and Client's A... is visible below the buttons. At the bottom are buttons for Select, New Client, and Cancel. A 'Search Results' dialog box is overlaid on top of the main dialog box, containing the text 'No matches found.' and an 'OK' button.

- a. The Search Results text box will disappear.
6. Click New Client at the bottom of the screen.



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- a. The Auto Assign Next ID Number box will appear.

The screenshot shows a 'Select Client' dialog box with fields for Last Name (JUNIE), First Name (BUG), Sex (Female), Social Security #, and Date of Birth. An 'Avatar 2014 - Client' modal window is overlaid on top, asking 'Auto Assign Next ID Number?' with 'Yes' and 'No' buttons. The background dialog box also has a 'Search' button and a table with columns 'S...' and 'Name'. At the bottom of the dialog box are 'Select', 'New Client', and 'Cancel' buttons.

7. Click Yes. The **Pre-Admission** form will open.
8. Verify that your information added from the New Client screen auto-populated.
- a. The **Facility, Episode Number, Client Name, Sex, RRG, and Date of Birth** will auto populate from the New Client screen; however, if any are missing, fill in those fields.

The screenshot shows the 'Pre-Admit' form with a red circle highlighting the following fields: Facility (1003), Episode Number (10), Client Name (DEVILLE, CRUELLA A IV MS), Sex (Female), RRG (RRG), and Date of Birth (02/2000). Other fields include: Type of Admission (Pre-Admission), Admitting Practitioner (SMITH, GARY (000005)), Expected Date of Admission, Scheduled Admitting Practitioner, Social Security Number (111-11-1111), Pre-Admission Diagnosis, Ever A Client In This Hospital (Yes), Employer (McDonalds), Disposition, Pre-Admission Disposition, Source of Admission, Current Resident Code, Veteran (No), and Homeless Indicator.

b.

9. If it does not auto-populate, fill in the **Date of Birth** field using the MM/DD/YYYY format or by clicking the T or Y button.



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- a. The client's date of birth is recorded.
- b. The **Age** field will auto-populate based on the date of birth entered.
10. Fill in the **Preadmit/Admission Date** field using the MM/DD/YYYY format or click the T or Y button.
 - a. The client's admission date is recorded.
11. Fill in the **Preadmit/Admission Time** field by either typing it in or clicking the Current button.
 - a. For quick typing, enter the time with an A (meaning AM) or P (meaning PM).
 - b. The client's admission time is recorded.
12. If it does not auto-populate, select an option from the **Program** drop-down menu.
 - a. The client's program type will be selected. Also, the Treatment Setting, Treatment Service, and RRG fields will auto-populate.
13. Select an option from the '**Type of Admission**' drop-down menu.
 - a. The client's admission type is recorded.
14. Select an option from the '**Source of Admission**' drop-down menu. The client's admission source is recorded.
15. Type a practitioner in the **Admitting Practitioner** field using the LAST NAME, FIRST NAME format.
 - a. A selection menu will appear.

The screenshot shows a pre-admission form with the following fields and values:

- Facility: 1003
- Episode Number: 10
- Client Name: DEVILLE, CRUELLE A IV MS
- Sex: Female, Male, Unknown
- Date Of Birth: 12/02/2000
- Age: 14
- Preadmit/Admission Date: 02/05/2015
- Preadmit/Admission Time: 03:13 PM
- Program: S1 Assessment Adult Pre-Admit
- Treatment Setting: Outpatient
- Treatment Service: SA Evaluations
- RRG: Assessments
- Type Of Admission: Pre-Admission
- Admitting Practitioner: SMITH, GARY (000005)
- Expected Date Of Admission: 02/06/2015
- Scheduled Admitting Practitioner: GARY SMITH (000005)
- Social Security Number: 111-11-1111
- Pre-Admission Diagnosis: (empty)
- Ever A Client In This Hospital: Yes, No

A red circle highlights the Admitting Practitioner field, which contains the text "SMITH, GARY (000005)".

16. Select **your Admitting Practitioner** by double-clicking on him/her.
 - a. The admitting practitioner field is selected.
17. Fill in the **Expected Date Of Admission** field using the MM/DD/YYYY format or click the T or Y button.
 - a. The client's admission date is recorded.
18. Type a practitioner in the **Scheduled Admitting Practitioner** field using the LAST NAME, FIRST NAME format.



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a. A selection menu will appear.

Facility: 1003
Episode Number: 10
Client Name: DEVILLE, CRUELLA A IV MS
Sex: Female Male Unknown
Date Of Birth: 12/02/2000
Age: 14
RRG: Assessments
Type Of Admission: Pre-Admission
Admitting Practitioner: SMITH, GARY (000005)
Expected Date Of Admission: 02/06/2015
Scheduled Admitting Practitioner: sm
Social Security Number: 111-11-1111
Pre-Admission Diagnosis: 290.10 DEMENTIA DUE TO CREUTZELT-JAKOB DISEASE, PICK'S DIS

19. Select your practitioner by double-clicking on him/her.

a. The attending practitioner is selected.

20. Social Security Number.

a. The number will remain when you tab to the next field.

Facility: 1003
Episode Number: 10
Client Name: DEVILLE, CRUELLA A IV MS
Sex: Female Male Unknown
Date Of Birth: 12/02/2000
Age: 14
Preadmit/Admission Date: 02/05/2015
Preadmit/Admission Time: 03:13 PM
Program: S1 Assessment Adult Pre-Admit
Treatment Setting: Outpatient
Treatment Service: SA Evaluations
RRG: Assessments
Type Of Admission: Pre-Admission
Admitting Practitioner: SMITH, GARY (000005)
Expected Date Of Admission: 02/06/2015
Scheduled Admitting Practitioner: GARY SMITH (000005)
Social Security Number: 111-11-1111
Pre-Admission Diagnosis:
Ever A Client In This Hospital: Yes No

21. Select either the Yes or No radial button in the **Ever A Client In This Hospital** field.

a. The client field will be recorded.



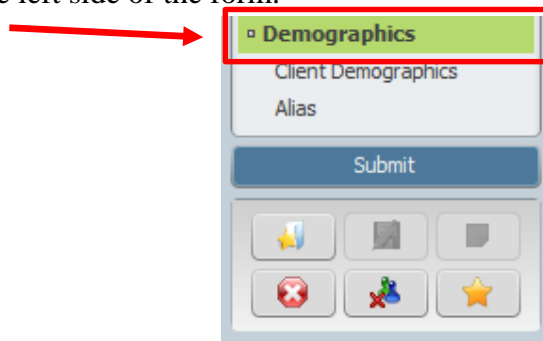
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22. Type an employer in the **Employer** field.
 - a. The client's alert is recorded.

The screenshot shows a form with several fields. A red circle highlights the 'Pre-Admission Disposition' field, which contains the text 'Pre-Admission disposition here.'. Other visible fields include 'Employer' (McDonalds), 'Disposition' (Anxious), 'Source Of Admission' (Court/Criminal Justice Referral/...), 'Current Resident Code' (With Children and Non-Relatives), 'Veteran' (No), and 'Homeless Indicator' (Independent Living).

23. Select an option from the **Disposition** drop-down menu.
 - a. The client's disposition is now recorded.
 24. Type the client's **Pre Admission Disposition** in the **Pre Admission Disposition** field. This is a free form field.
 - a. The client's detailed disposition is recorded
 25. Select an option from the **Source Of Admission** drop-down menu.
 - a. The client's source is recorded.
 26. Choose a radio button for the **Veteran** indicator. Yes means he/she is a veteran. No means he/she isn't.
 - a. The client's veteran status is recorded.
 27. Select an option from the **Homeless Indicator** drop-down menu.
 - a. The client's housing status is recorded.
1. Once all the needed information/information provided is entered move to **Demographics** by clicking on the tab on the left side of the form.



- a. The **Demographics** section should appear.
2. Most fields will auto populate from previous forms, but information can still be added/changed.
3. Click on the Clinical Summary tab on the left hand side of the screen to continue



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A screenshot of a form menu. The menu items are: Pre-Admit, Demographics (with sub-items Client Demographics and Alias), Clinical Summary (highlighted in green and circled in red), and Comments. Below the menu is a blue Submit button. At the bottom, there are six icons: a blue star, a grey square, a yellow square with '0', a red square with a white 'X', a blue square with a white 'X', and a yellow star.

4. In the **Pre-Admission Presenting Psychiatric Problems** field, enter the client's Presenting Psychiatric Problems.
 - a. This field will remain when you tab to the next field.
5. In the **Current Psychiatric Medications** field, enter the client's medications.
 - a. This field will remain when you tab to the next field.
6. In the **Current Other Medications** field, enter the client's non-psychiatric medications.
 - a. This field will remain when you tab to the next field.
7. In the **Pre-Admission Medical Problems** field, enter the client's medical problems.
 - a. This field will remain when you tab to the next field.



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4 → Pre-Admission Presenting Psychiatric Problems

5 → Current Psychiatric Medications

6 → Current Other Medications

7 → Pre-Admission Medical Problems

Previous Hospitalization Subs Abuse
 Yes No

Drugs Of Choice

8. In the **Previous Hospitalization Subs Abuse** column fill in the circle that correctly describes whether your client has had substance abuse issues in previous hospital visits. Yes means that they have had previous substance abuse issues, No means they have not.



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Pre-Admission Presenting Psychiatric Problems

Current Psychiatric Medications

Current Other Medications

Pre-Admission Medical Problems

Previous Hospitalization Subs Abuse

Yes No

Drugs Of Choice

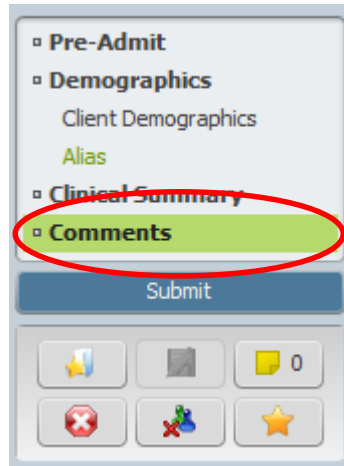
9. In the **Drugs Of Choice** field, enter the client's preferred substance.

10. When the **Clinical Summary** tab is completed, click on the **Comments** tab on the far left side of the screen to continue.

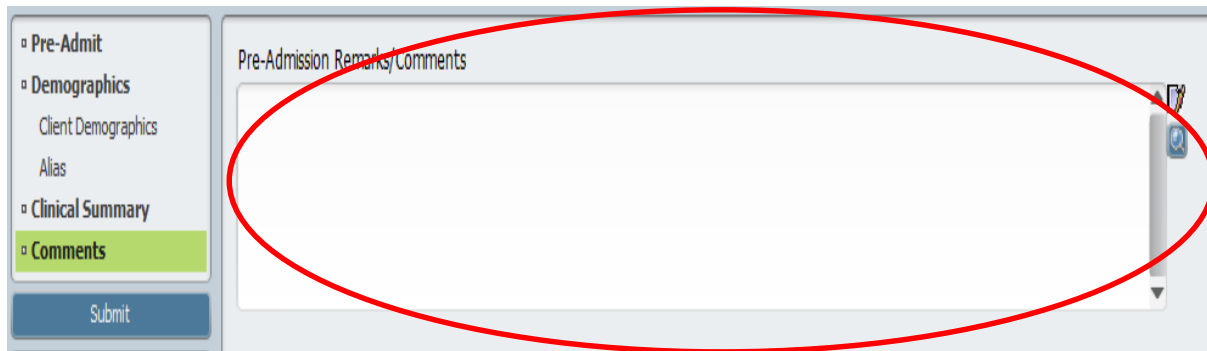


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11. You will be taken to the **Pre-Admission Remarks/Comments** field. This is a free form field which will allow you to enter any additional comments as necessary to help the client.



12. When finished with the Comments section, and you are satisfied that all of the other information in all of the other tabs is complete and correct, click on the **Submit** button. The client's pre-admission data is recorded. You will now return to the Avatar home screen.

