Client Discharge Workflow Validation

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Access the Client record

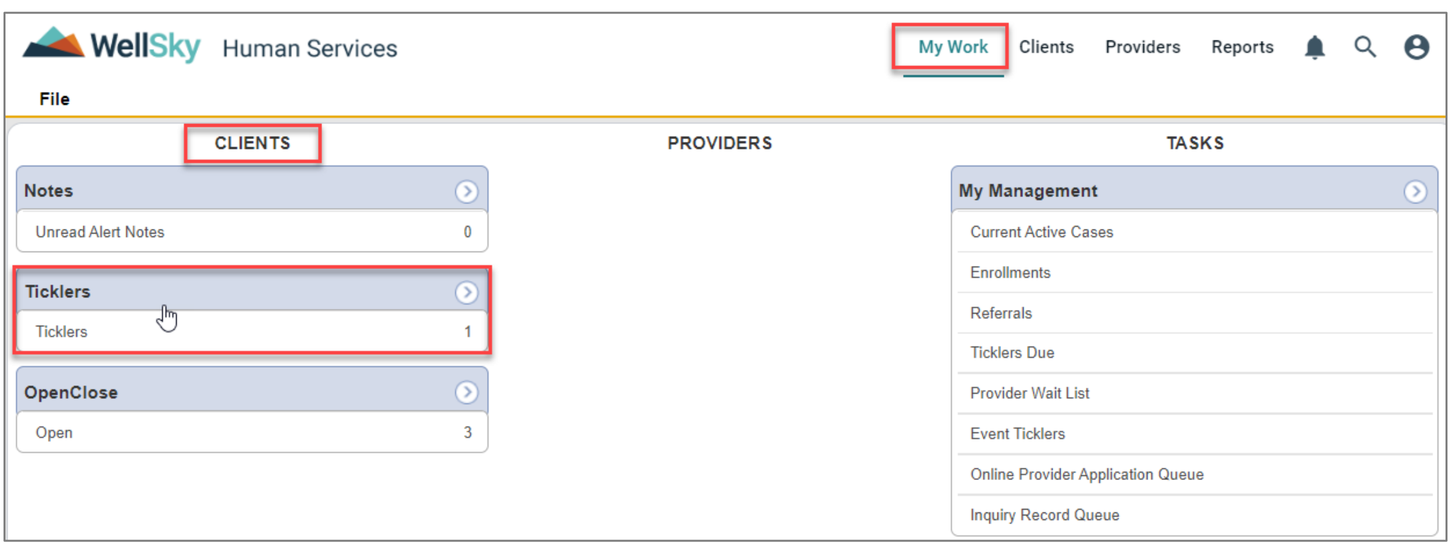
There are many ways to access the client record to begin the discharge process. Use only one of these options to locate the client record. Then proceed to the next section, Add Client Discharge Summary form for TEDS.

First, be sure you are using the Provider Role. If you are unsure how to do this, please refer to the "Set Role" section of the Client Admission Workflow Validation document.

Option 1: Use Ticklers to find Clients that need to be discharged

1. The Provider user will be reminded to discharge this client via a message tickler 60 days after the **1. TEDS / SABG Data Collection** Assessment/form was saved with a status of "Complete".

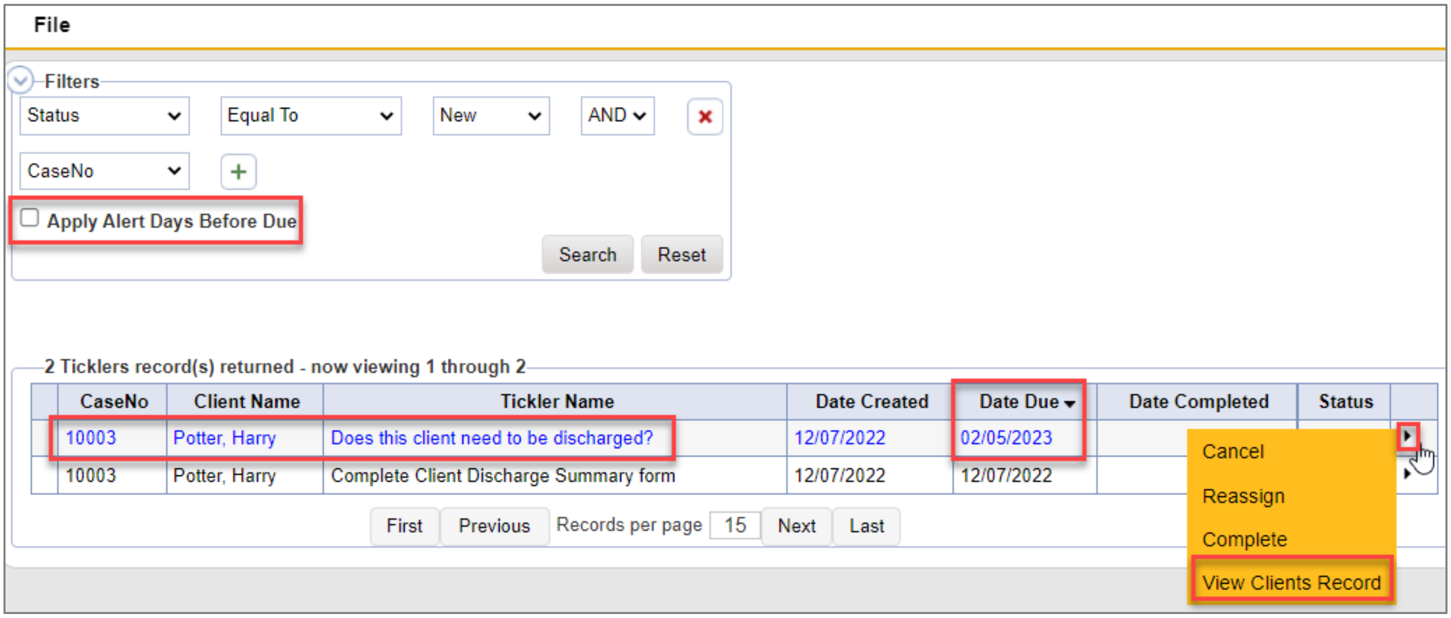
    a. In the **My Work** chapter, under the **Clients** column click **Ticklers.**



Caption: screen shot showing the My Work chapter with the Clients column and Ticklers panel selected

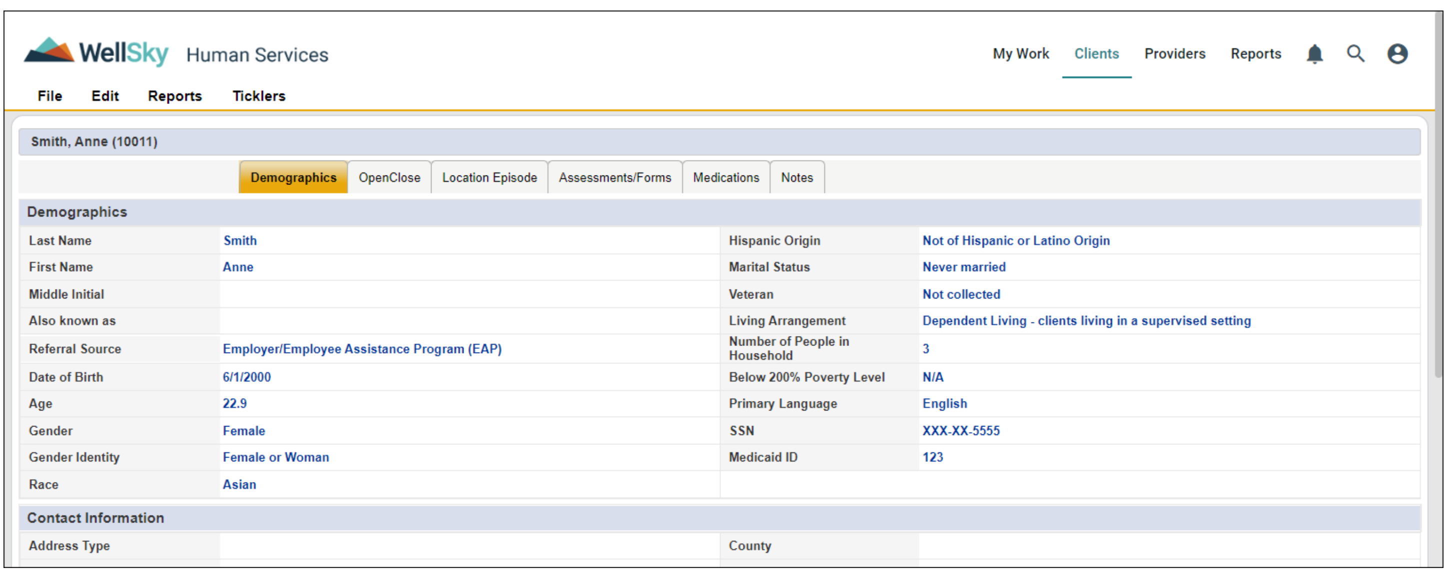
	Tip *The tickler will appear on the date it is due BUT if the due day hasn't arrived yet and you need to see it for testing, you must uncheck the "Apply Alert Days Before Due" box and click Search.*

b. Hover over the **black arrow** to the right of the row and click **View Client's Record**.



Caption: screen shot showing the tickler list with he Apply Alert Days Before Due and the View Clients Record selected

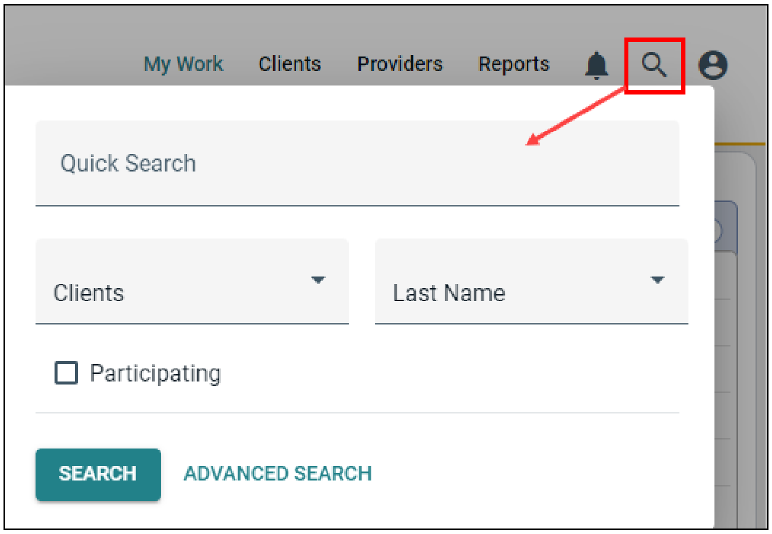
c. You are now on the client record.



Caption: Screen shot of a client's record

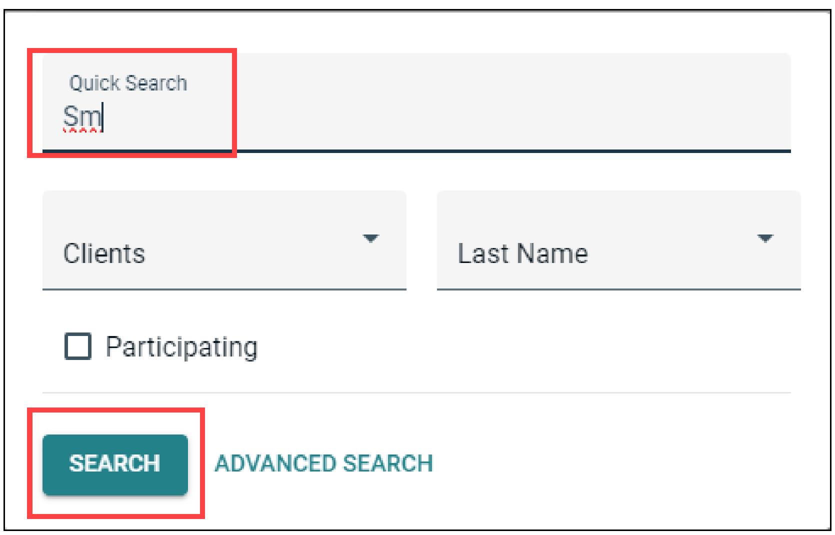
Option 2: Quick Search

2. Access the client record through quick search.
   a. Click the **search magnify glass** icon in the upper right-hand corner of the screen. It should look like the screen below. If needed, change the dropdown in the middle of the screen to "Clients" and "Last Name".



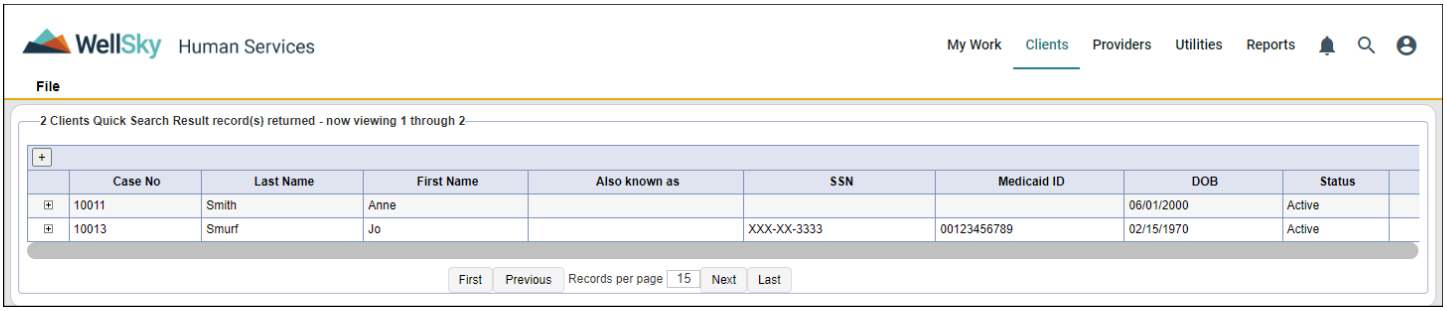
Caption: Screen shot of the quick search window when first opened

   b. Where it says "Quick Search" enter the first few letters of the client's last name. Click **Search**.



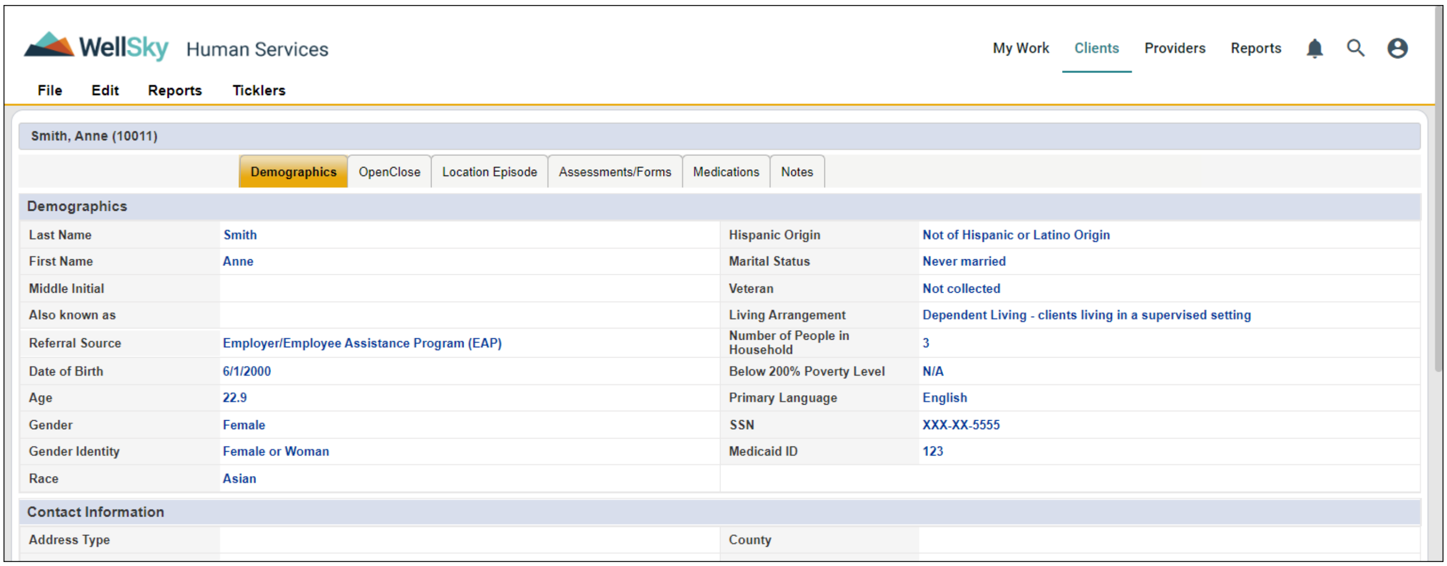
Caption: Screen shot of the quick search window with the start of a last name entered ("Sm")

   c. If only one match is found, the system will automatically take you to the record, if not, a list of matches will be shown. Once the correct record is found, **click anywhere within the row** to go to the client record**.**



Caption: Screen shot of Quick Search results

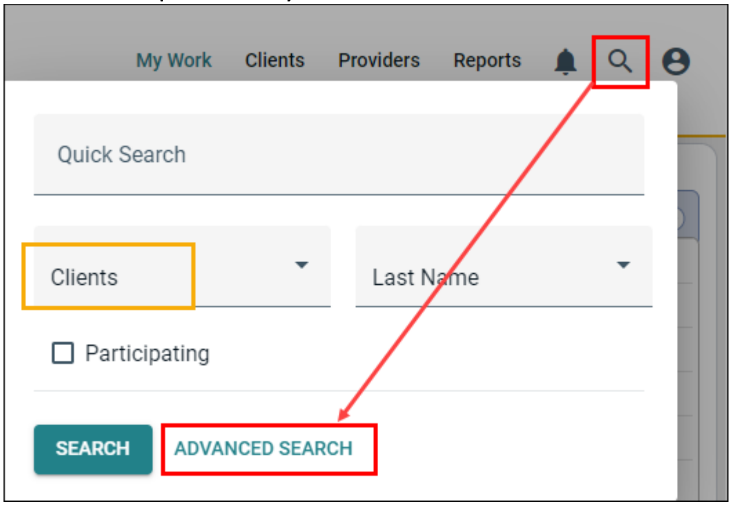
d. You are now on the client record.



Caption: Screen shot of a client’s record

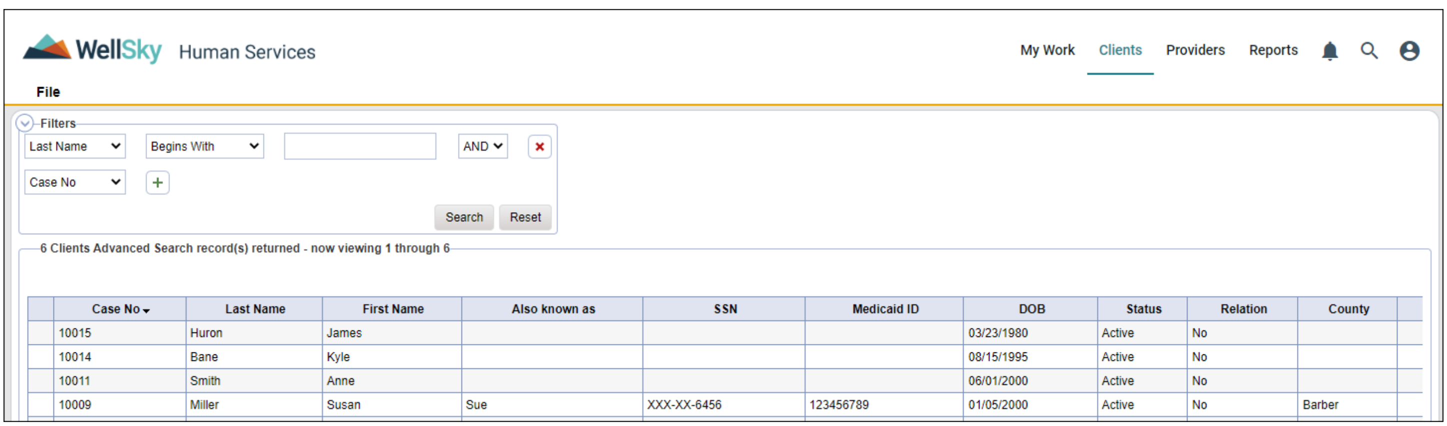
Option 3: Advanced Search

3. Access the client record through advanced search.
    a. Click the **search magnify glass** icon in the upper right-hand corner of the screen. Be sure the first dropdown says “Clients”. Click **Advanced Search**.



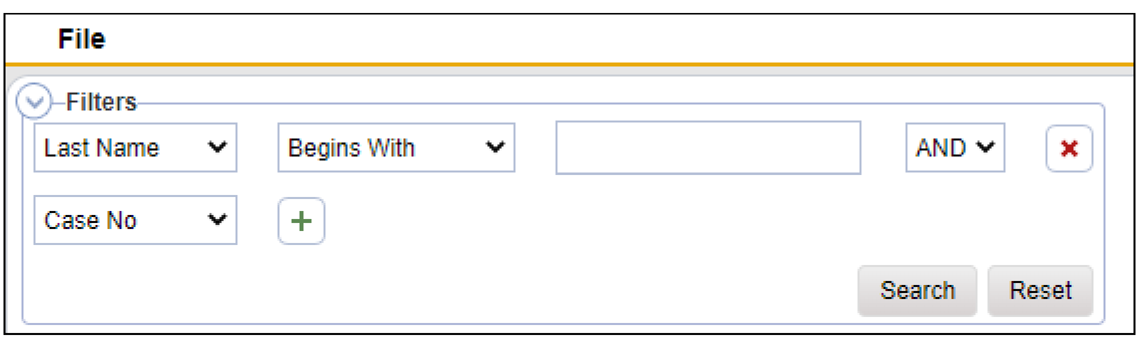
Caption: Screen shot of the search window when first opened

    b. The Advanced Search screen appears and by default shows all clients you have permission to see.



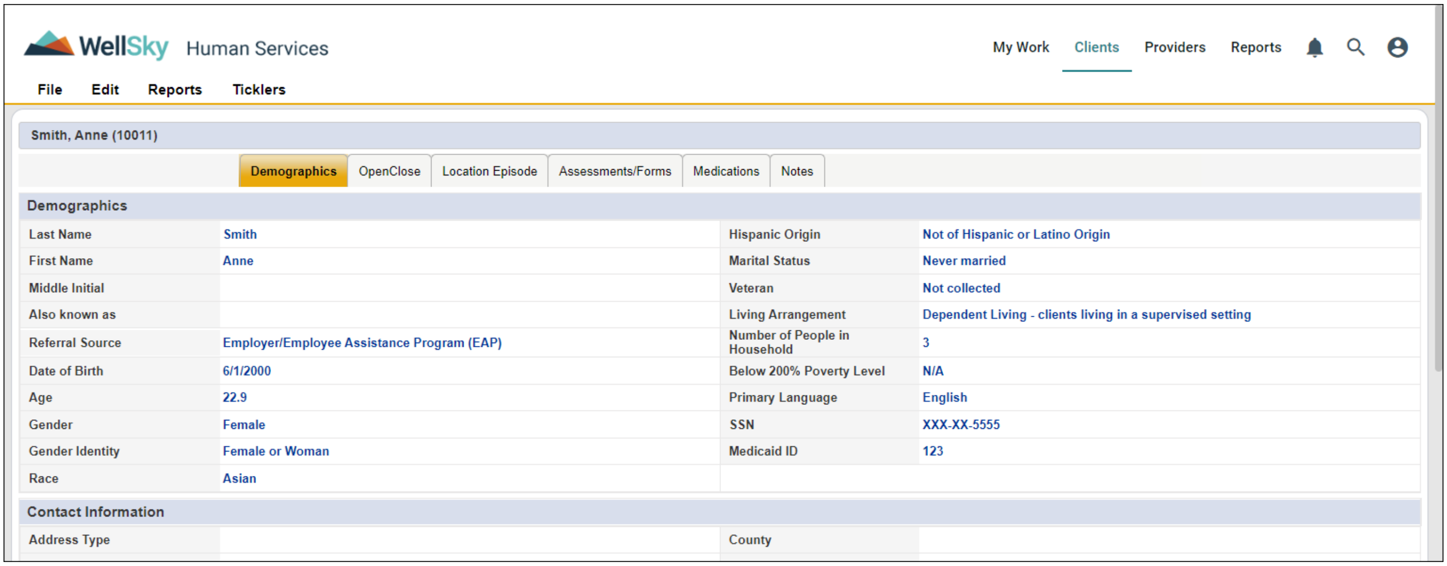
Caption: Screen shot of advanced search screen with results shown

    c. The list can be filtered to show less records by using the filters section.



Caption: Screen shot of filter section of Advanced Search window

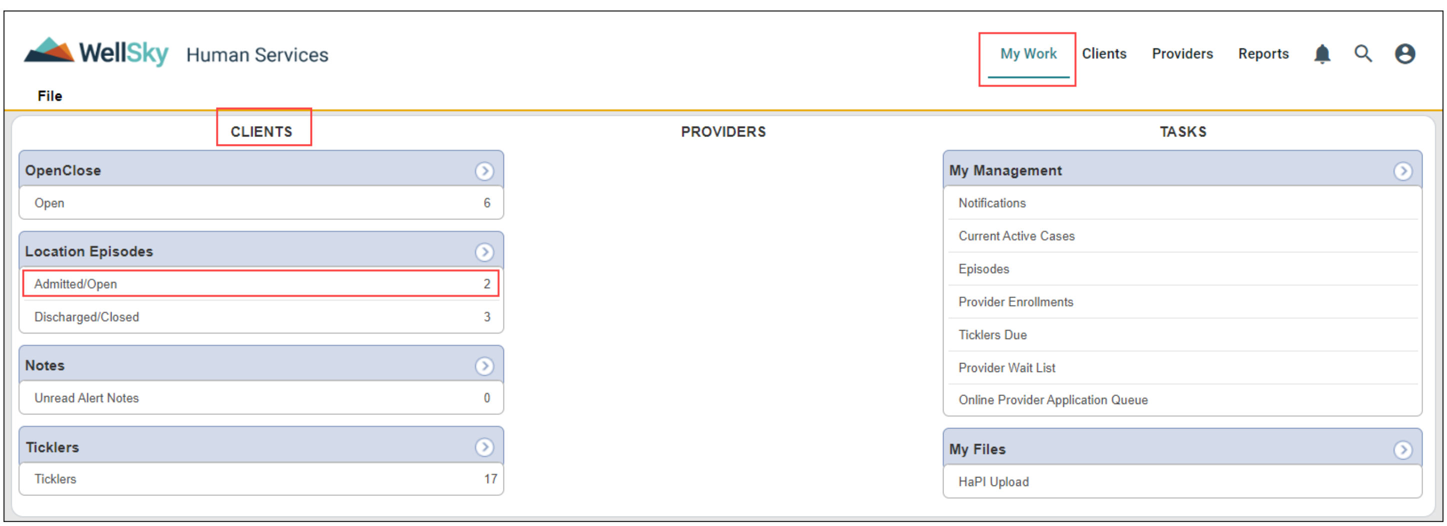
d. Multiple filters can be used at once. Add additional fields with the plus sign and remove them with the red X .
e. Once the correct record is found, **click anywhere within the row** to go to the client record.
f. You are now on the client record.



Caption: Screen shot of a client's record

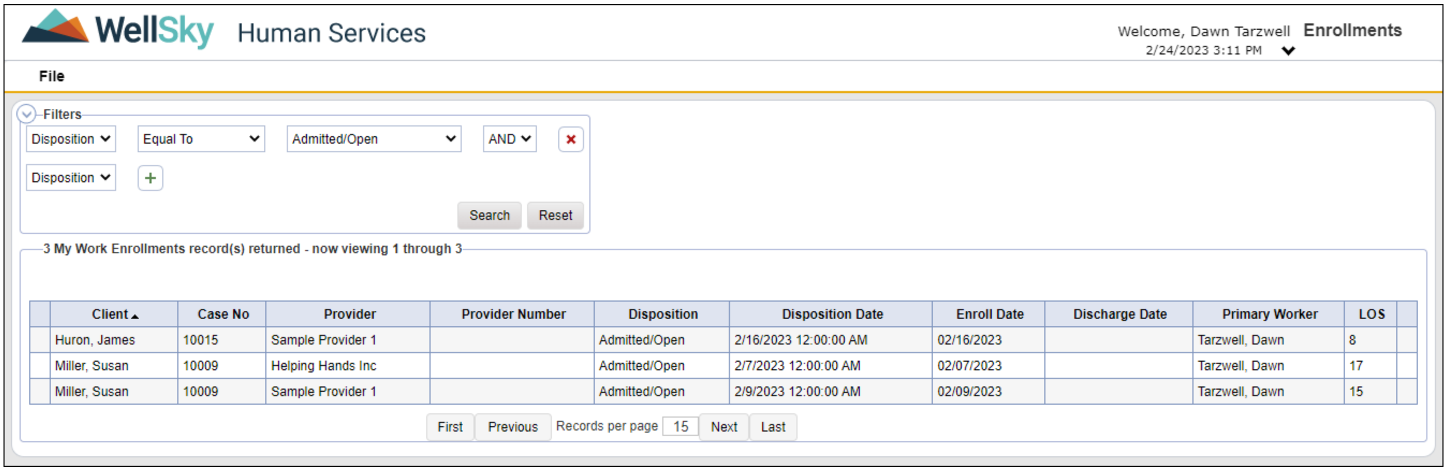
Option 4: My Work

4. Access the client record from the My Work dashboard.
    a. Click on My Work
    b. Under Clients, click on "Admitted/Open" under Enrollments.



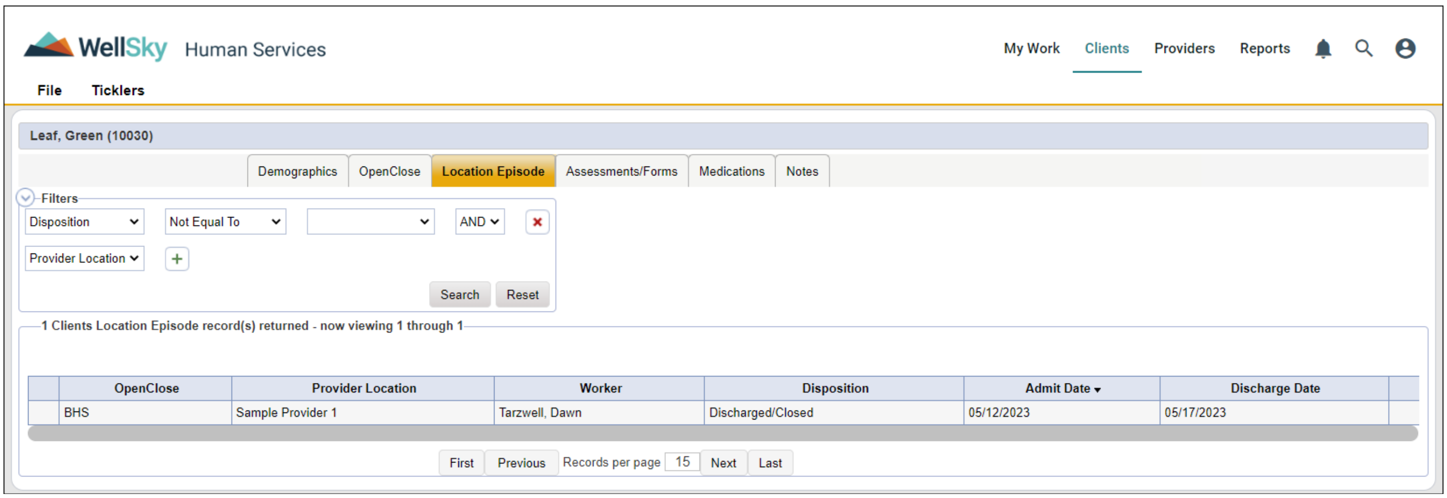
Caption: Screen shot of My Work, with Clients and Admitted/Open enrollments indicated

c. You will see a list of all your clients with this status.
d. Once the correct record is found, **click anywhere within the row** to go to the client record.



Caption: Screen shot of the list of clients in the selected disposition

e. You are now on the client record.

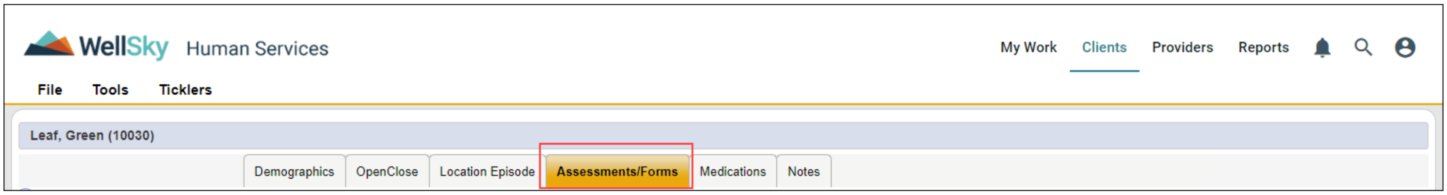


Caption: Screen shot of a client's record

Add Client Discharge Summary form for TEDS

Now that you have accessed the correct client record we can begin the discharge process.

1. Click the **Assessments/Forms** tab.

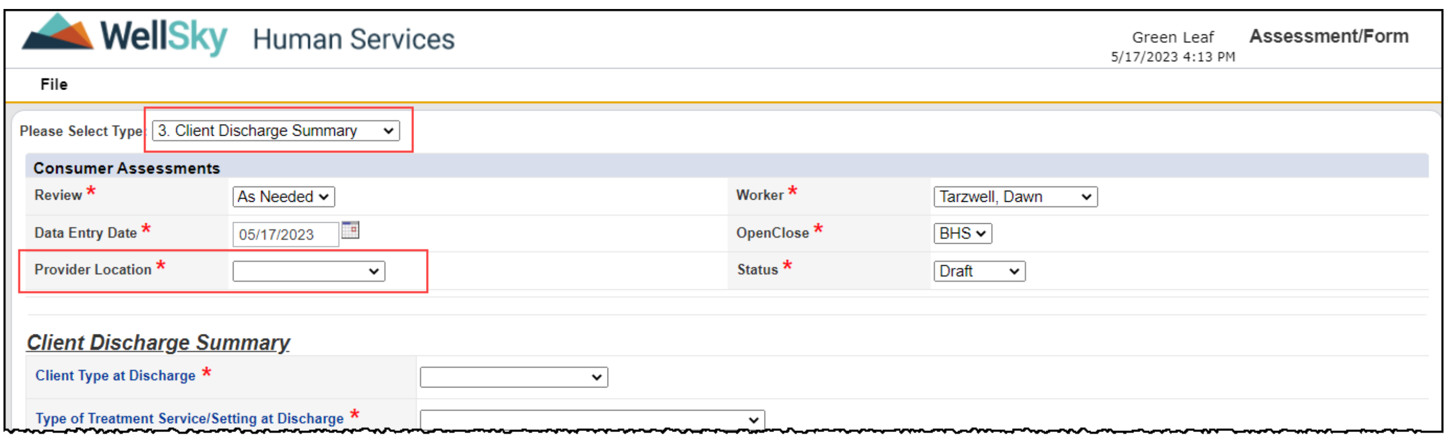


Caption: Screen shot of client's tabs

2. On the **File** menu, click **Add Assessment/Form**
    a. In the **Please Select Type:** dropdown, select **3. Client Discharge Summary**.
    b. Fill out the header section.
        i. Select the correct provider location from the dropdown.

CAUTION	**Caution** If you do not enter a provider location in the header you will NOT be able to save the form.

        ii. Worker defaults to current worker (person collecting the data). *(If this needs to change, click the ellipse (…) next to the field and search for the last name of the new worker)*
        iii. Leave Review and Data entry date as the default values.
        iv. Leave Status in Draft until data entry is finished.

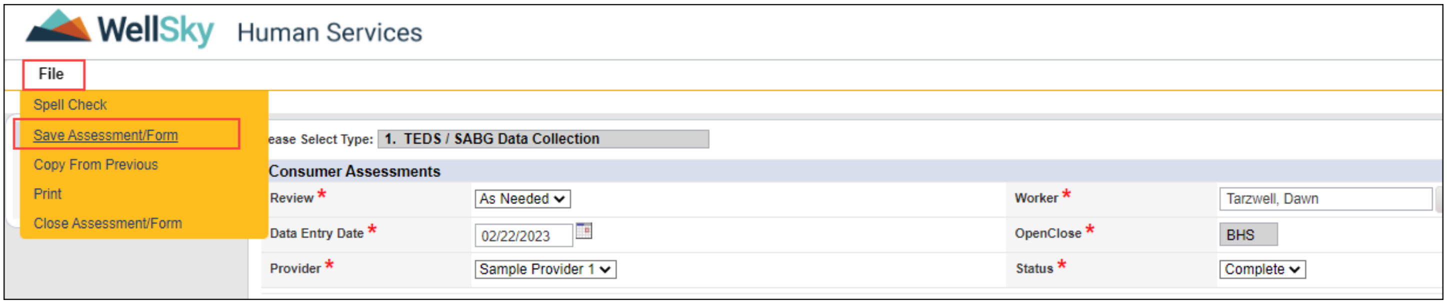


Caption: Screen shot showing header information on new assessment/form

3. Fill out the rest of the form. Remember that a red asterisk after the question means an answer is required. All questions should be answered based on status at discharge. TEDS questions reported with the discharge data which are based on status at admission (e.g., DIS 13 through DIS 16) will automatically be pulled from the form "1. TEDS / SABG Data Collection" and do not need to be supplied here.
    a. You can save this form in the status of "Draft" as often as you like without all required fields being filled in, but to "Complete" this form all required fields must be populated.
    b. When finished entering all of the data, go back to the top of the screen and change the **Status** to **Complete**.

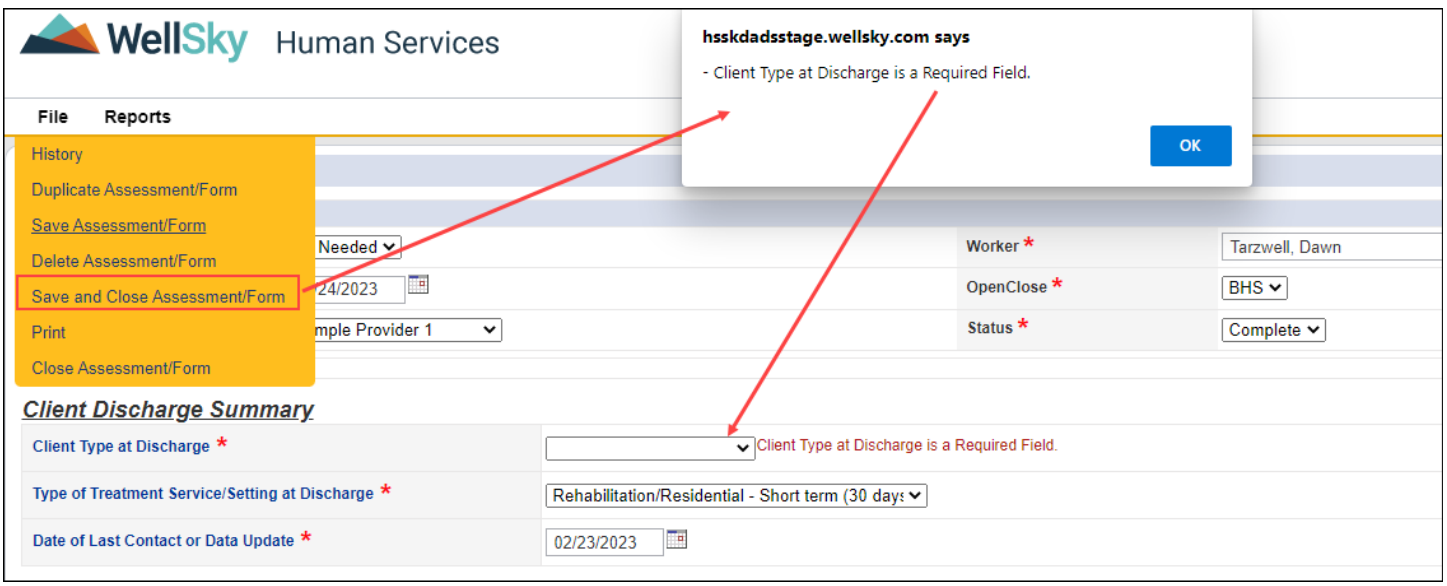
c. Click OK to the message stating “By changing the status of this record, all required fields must be completed before the record can be saved. Do you want to continue?”

d. On the **File** menu, click **Save and Close Assessment/Form**.



Caption: Screen shot showing the Save and Close Assessment/Form menu option

e. If you missed any required fields, they will be marked with a message in red like below. Correct these then attempt to save again.



Caption: Screen shot showing an example of a required field missing

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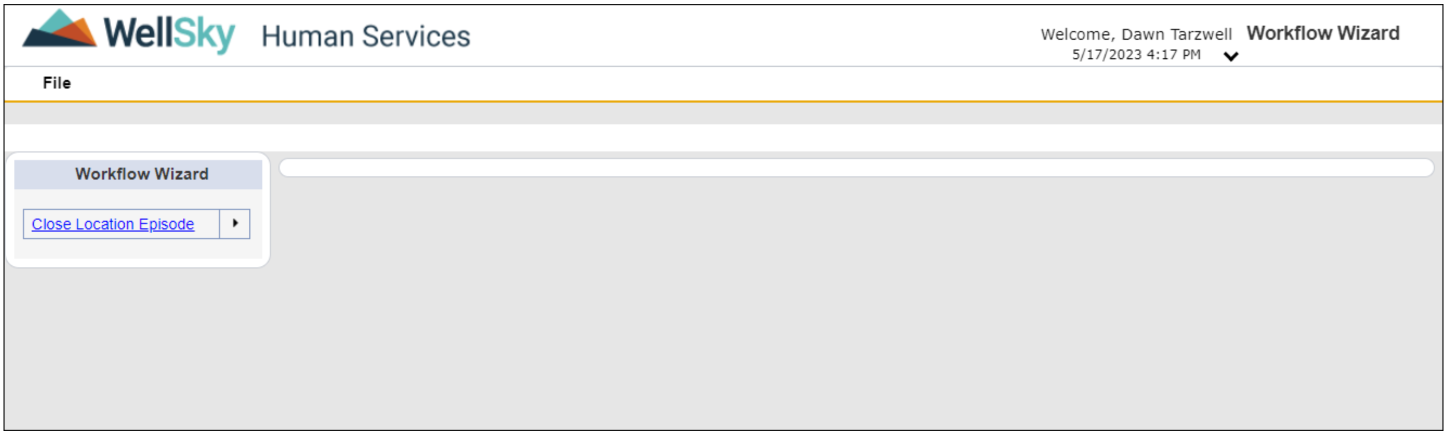
A workflow wizard will appear to take you through the final step to close/discharge the client.

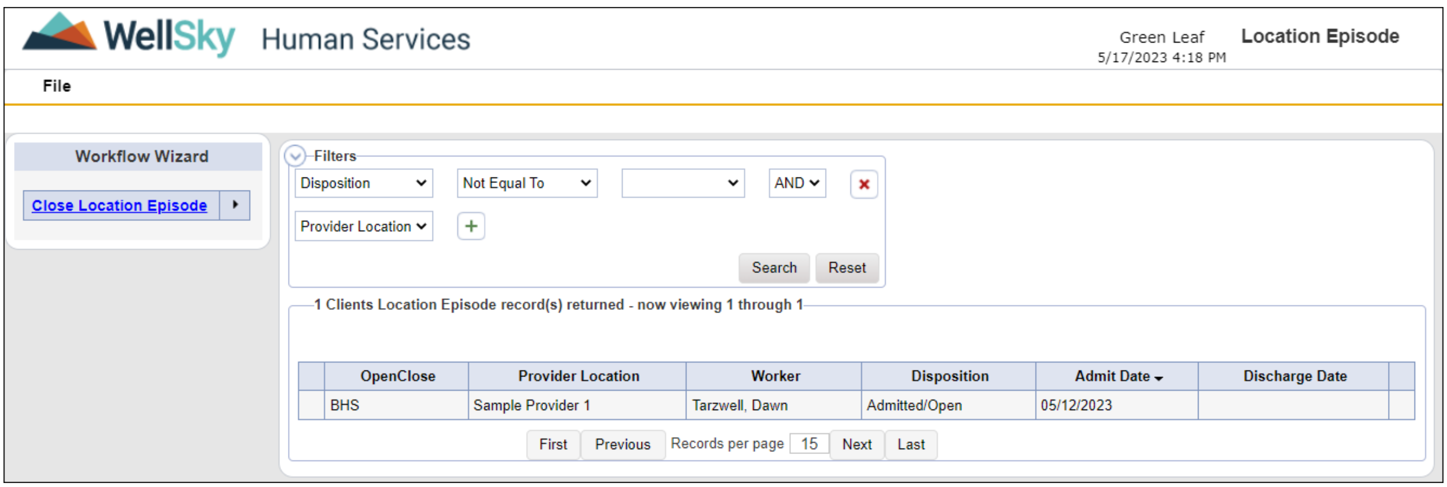
Close/Discharge an Episode

1. A Workflow wizard screen will appear.



Caption: Screen shot of Workflow Wizard with 1 task

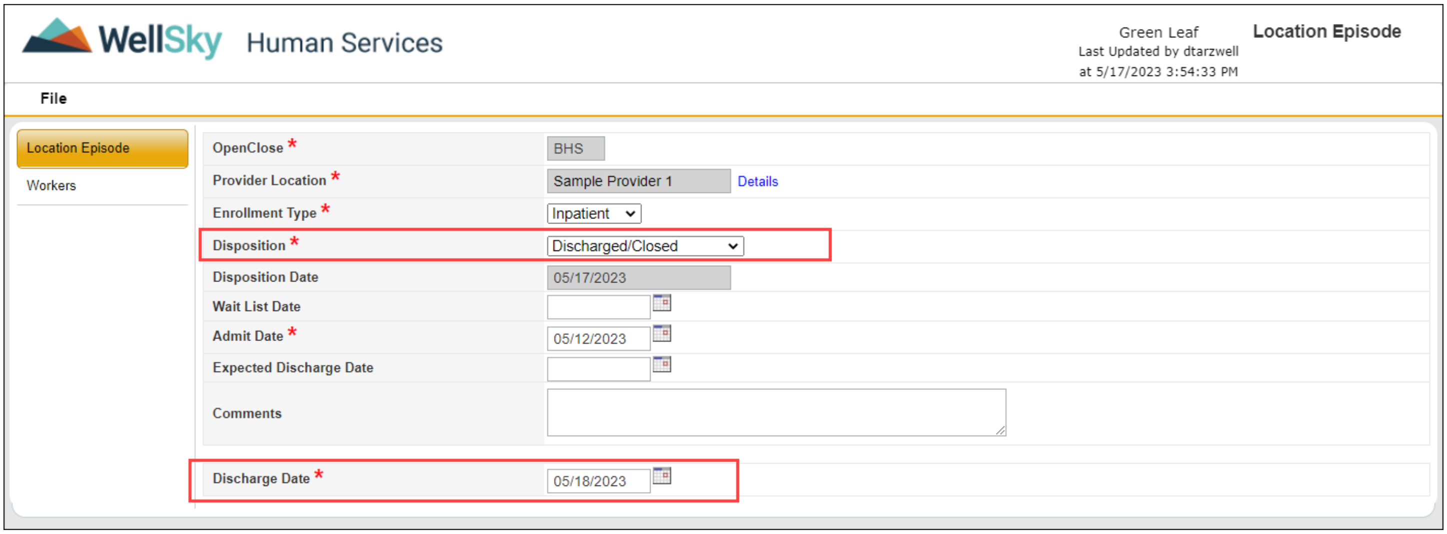
2. Click the task, **Close Location Episode**.
   a. A list view showing all episodes for the client will appear.



Caption: Screen shot of Workflow Wizard with list view of Episodes showing

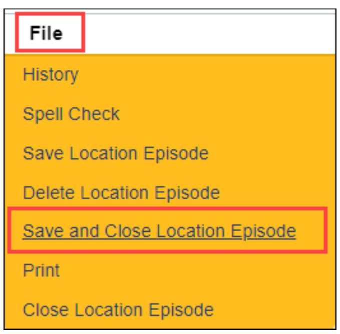
   b. Locate the current episode (there may be past episodes listed along with the current one). Click anywhere on that row to edit the Episode.

i. Change the Disposition to “Discharged/Closed”.
ii. The Discharge Date defaults to today, edit it as needed.
iii. Answer any other needed questions.



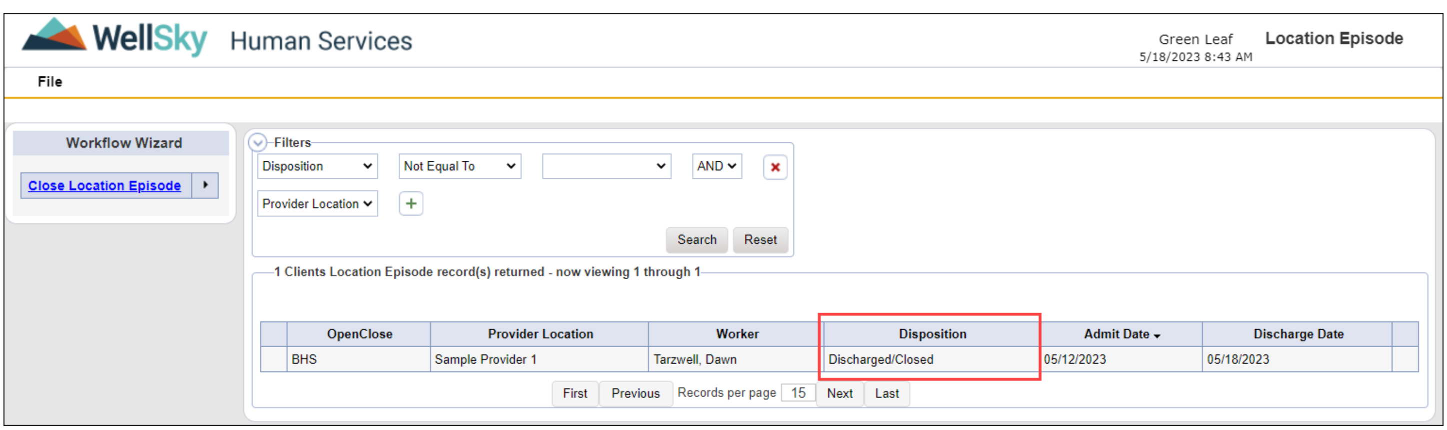
Caption: Screen shot of Episode record showing Disposition and Discharge Date fields

c. From the **File** menu, select **Save and Close Location Episode**.



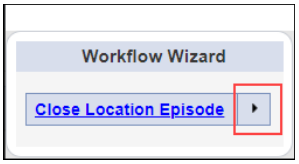
Caption: Screen shot of File menu

d. You will be returned to the Workflow Wizard screen with the list view showing all Location Episodes for the client. Note that the status is now showing as “Discharged/Closed”.

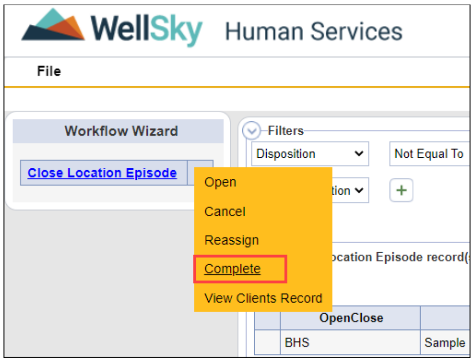


Caption: Screen shot of Workflow Wizard with list view of Location Episodes showing

e. Move your mouse pointer over the black triangle to the right of the task “Complete Episode”. From the fly out menu, click **Complete**.

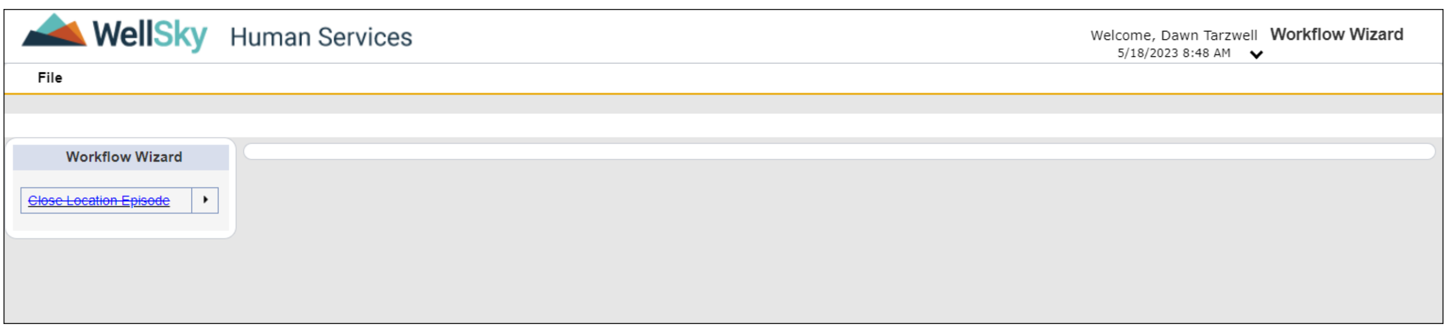


Caption: Screen shots of flyout menu



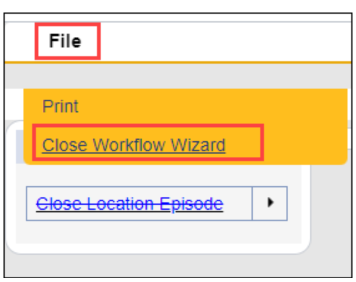
Caption: Screen shot of flyout menu once expanded

f. The task will now be crossed out, indicating it is complete.



Caption: Screen shot of Workflow Wizard screen with the task crossed out

g. On the **File** menu, click **Close Workflow Wizard**.



Caption: Screen shot of File menu

Client discharge is now complete.