

State Waitlist Guide

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INTRODUCTION

The IBHRS State Waitlist assists the Iowa Department of Public Health to monitor treatment access, engagement, and capacity for individuals who are pregnant and/or have used a drug(s) via IV injection in the past 30 days to meet the specific Substance Abuse Block Grant Requirements (§96.126, §96.131).

The **State Waitlist** menu option, labeled as A in Figure 1 below, is accessed via the "blue" Home Page menu on the left hand side of the IBHRS Home Page screen. The **State Waitlist** is visible to a user when the **Grant Management** domain is added to an **Agency Profile** in IBHRS, their **Staff Member Account** includes the **Grant Management** domain and the **Cross Agency State Waitlist Management** role.

IBHR 21.4.1	IS UAT	SSRS Reports	Snapshot	:	EP	Eric Preuss Iowa Department of Public Health
Home Page	Change Facility					
R	rent Agency					
I:= State Waitlist	A wa Department of Public Health					
IBHRS Dashboard	Current Facility					
•	New Agency					
	Iowa Department of Public Health					
выка керотану	New Facility					
Agency	•					
Client List	Go × Cancel					
(3)						
System Administration						

Figure 1: IBHRS Change Facility Screen

This **State Waitlist Guide** contains an overview of the State Waitlist workflow, screenshots of the workflow, and additional information to help support the use of the State Waitlist. Send questions regarding the State Waitlist to <u>SAPGData@idph.iowa.gov</u>.



STATE WAITLIST WORKFLOW

The State Waitlist workflow listed below shows the steps to use the State Waitlist within IBHRS.

- 1. To add a patient to the Waitlist, the user creates a **Client Profile** for the patient (if not already created).
- 2. The user then clicks on the **State Waitlist** and chooses an appropriate agency(s)/program(s) for the patient. The use may choose to use any of the various search fields to assist with locating an appropriate program match for their patient.
- 3. The user will click on the "pencil" icon next to the program selected and select "Review List". This will bring the user to the **Client Waitlist** screen for the chosen program.
- 4. The user will click "Add Client to Waitlist". The Client Wait List Profile screen will appear.
- 5. The user fills in the required fields on the **Client Waitlist Profile**.
 - Date on Waitlist
 - Phone Number
 - Client Name (this is a search field. If patient does not appear, a Client Profile needs created for the patient)
 - IV Drug User
 - How was the person informed of the disposition
 - Is Consent Signed
 - If the patient **did** sign a consent form:
 - a. Add the patient to **the State Waitlist** by saving the **Client Waitlist Profile** with the waitlist status as "Referred".
 - If the patient did **not** sign a consent form:
 - a. The **Client Waitlist Profile** cannot be saved, as the patient may not be added to the State Waitlist.

NOTE: If the user chooses to place a patient on a local waitlist, a Consent is not required, and **Client Waitlist Profile** will save, and patient's waitlist status is set to "Referred".

- 4. The patient's referral packet is then uploaded (<u>State Waitlist Consent</u> and <u>IDPH StateWaitlist Cover Sheet</u>; click on the three dot ellipsis and click on review to bring up the **Client Waitlist Profile.** Click on "Documents" at the top of the profile (See Figure 6) to drag and drop the files to upload.
- 5. Referral Email to Receiving Program: Users with "Cross-Agency Waitlist Management (Full Access)" role within the receiving agency(s) will receive an email notification of a patient referral to their program.
- 6. The Referral Email will contain an abbreviated version of the **Client Waitlist Profile** and changes to the **Waitlist Status** to one of the following values:
 - Rejected
 - \circ \quad A rejected status is required to have a rejection reason.
 - Pending Admission
 - o A Pending Admission status is required to have a Pending Admission Date
 - Admitted
 - An Admitted status is required to have an Admission Date (Is not to be a future date)
 - Closed
 - A Closed status is required to have a **Closure Reason**.
- 7. If the receiving agency decides to move forward with a referred patient, the waitlist status will be set to "Pending Admission" with a **Planned Date of Admission** listed.



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- Specified users within the placed by agency will receive an email notification when the patient has a **Planned Date** of Admission.
- 8. When the "referred to program" admits the patient, the specified user will update the patient's waitlist status to "Admitted" and submit the **Date of Admission**. This cannot be a future date.
 - Specified users within the "referring program" will receive email notification when the waitlist status changes to "Admitted."
- 9. The **Client Waitlist Profile** locks and workflow ended once the patient status changes to admitted.

Note: The User at the referred to program can choose to set the patient's waitlist status to "Closed" at any time if the patient has not been "Rejected" or "Admitted". The following "Closure Reasons" are available:

- Pending Admission at another program
- Unable to locate patient/Patient refuses treatment
- Patient did not show

If a patient is added (referred) to multiple program waitlists, the first program to change the patient's waitlist status to "Pending Admission" will automatically change the remaining waitlist statuses from "Referred" to "Closed".

ASSUMPTIONS

- Patients will sign consents (release of information) outside of IBHRS via the "referring agency's" current consent policy/procedure.
- Referring agencies will share via the State Waitlist the "referral packet" to the programs for which the patient was referred on the date that the patient is placed on the waitlist.
- For patients that do not have a **Client Profile** in IBHRS, the user will create a Client Profile.
- The Priority Score field contains the score based on responses to the two dropdowns "Pregnant" and "IV Drug User" on the Client Waitlist Profile. When either of those fields equals "Yes" the Priority Score is calculated (Pregnant = 3; IV Drug User = 2; both = 5).



IBHRS STATE WAITLIST

	RS UAT	SSRS Reports	Snapshot	:	EP	Eric Preuss Iowa Department of Public Health
Home Page	Change Facility					
State Waitlist	A wa Department of Public Health					
IBHRS Dashboard	Current Facility					
IBHRS Reporting	New Agency Iowa Department of Public Health					
Agency	New Facility					
Client List	Go × Cancel					
System Administration						

Figure 2: IBHRS Agency Change Facility Screen

To see and access the State Waitlist menu item (A), the following must be in place. Agency will need to provide IDPH a list of staff members to have access to the State Waitlist:

- The GRANT MANAGEMENT DOMAIN is added to the Agency Profile;
- Add GRANT MANAGEMENT DOMAIN to the Staff Member Accounts; and
- Add CROSS-AGENCY WAITLIST MANAGEMENT (Full Access) to the Staff Member Accounts.

IBHF 21.4.1	RS UAT	SSRS Reports Snapshot : EP Eric Preuss Iowa Department of Public Health, Bug test	•
Home Page	January 17 Hello, Eric	There is currently 1 person that has been referred in. There is currently 1 support ticket with status 'Pending WITS Admin'. X	
IBHRS Dashboard	Announcements You have no announcements.		
Agency Client List	Alert List Q. Search in Agency Q. Search Supervisee Alerts You have no alerts.		



Figure 3: IBHRS Home Page (Waitlist Client Waiting Alert)

Additionally, the **Waitlist Client Waiting Alert** (Figure 3) has been enabled (Home Screen alert). The Waitlist Client Waiting Alert is available for Agencies to track patients that have been on the waitlist for a particular period (configurable by each agency - AGENCY>ALERTS CONFIGURATION).

STAFF MEMBER ACCOUNT

There are two Staff Member Account Roles tied to the State Waitlist (See D in screenshot below). Select and add CROSS-AGENCY WAITLIST MANAGEMENT (Full Access) for those staff members who will be using and monitoring the State Waitlist.

Available Roles	Hide Inherited Roles	Show description	Assigned Roles	Show descriptio
wait		Q	Search	Q
Cross-Agency Walflist Management (Full Access) Allows access to the Cross-Agency walfst menu items and screens. User can create new records and edit existing ones. Cross-Agency Walflist Management (Read-Only)	Task Group View included roles	0	Agency Administrator Task Group This role should be assigned to the person in charge of updating an Agency record (Agency <u>View included roles</u> Profile, Contacts, Governance, Amouncements, Tx Team Groups, etc.). This role gives access to all sub-menus under the Agency List, as well as Group Notes and the Reports	•
Gives user access to the Cross-Agency Wattist menu items and screens in read-only mode.	View included roles	0	Securit. Case ReOpen Allow the user to re-open a closed case on Client List/Activity List/Intake screen. Vew included roles Vew included roles	•
			Client Diagnosis (Full Access) Task Group Full access to the Diagnosis fields on Client Diagnosis screens under Client List/Activity View included roles Intel Accessment/Diagnosis - Anteriority Diagnosis - ac-Tractment/Tur-Diagnosis-	•

Figure 4: Staff Member Account Roles

The Grant Management Domain needs added to each account in order to see the STATE WAITLIST in the IBHRS Home Screen Menu.

Domains		~
Substance Abuse		ø •
Grant Management	×	
Save <u>Cancel</u>		

Figure 5: Staff Member Account Domains



PROGRAM SET UP

IDPH will set up agency facilities and state waitlist eligible programs in IBHRS. Agencies are not to edit any program set up to participate in the State Waitlist.

If updates to an existing program or a new participating program needs added, please contact the SAGP Data Help Desk (<u>sapgdata@idph.iowa.gov</u>). See Figure 6 below for an example of a Program Setup for the IBHRS State Waitlist.

Program Setup			
▲ Hide Context Information			
lowa Department of Public Health	Residential	0	Substance Use Treatment
Program Name		Display Name	
ASAM 3.5		ASAM 3.5	
Grant Management	•	7/1/2021	Ē
Modality 14-Clinically managed high intensity res	idential		~
Modality Specifier			
Adult Residential			•
Level of care III.5			~
Grant		Residence	
	•		•
Available Reporting Guidelines		Selected Reporting Guidelines	
		õ	
Age Group		Gender Specific	
Adult	-	CO-ED	•
Waitlist Availability Type	_		
clossagency	•		
Save Save and Finish	Cancel		
Capacity List			
+ Add New Capacity			
Capacity Type 🗸			Capacity 🗸
Beds			25

Figure 6: IBHRS State Waitlist Program Setup



ADDING A PATIENT TO THE STATE WAITLIST

To add a patient to the State Waitlist, click on **State Waitlist** in the IBHRS side menu and the **State Waitlist Search** screen (See Figure 7 below) will appear. Users may search participating programs on this screen, or simply scroll through the list using the scroll bar. Clicking on the **State Waitlist List** columns will re-order the list.

IBHRS UAT				SSRS Reports Snapshot	EP Eric Pri Iowa D	euss epartment of Public Health, IDPH Residenti	ial
State Waitlist My Programs State Waitlist My Clents State Waitlist My Clents State Waitlist My Clents State Waitlist State Waitlist My Clents State Waitlist State Waitlist My Clents State Waitlist State Waitlist	State Waitlist Search	iity Name	v v				
	State Waitlist List Agency/Facility Administrative Agency/Administrative Unit	Facility City 🗸 abc	Program ∨ Admin Test	Modelity V	#on Weitlist ∽ 1	Age/Gender V Adult and Youth/None	
	Administrative Agency/Administrative Unit Alcohol and Drug Dependency Service/ADDS Residential Tx	abc Burlington	Grant ASAM 3.1	Intensive outpatient Clinically managed low intensity residential	0	Adult and Youth/None Adult/CO-ED	

Figure 7: State Waitlist Search Screen and State Waitlist List

Click on the three-dot ellipsis and choose "Review List" to bring up the **Client Waitlist** screen. Click on "Add Client to Waitlist" to add a patient to the program's waitlist (see Figure 8 below).



Client Waitlist

Agency Iowa Department of Public Health	Facility Residential			
Program Name ASAM 3.5				
Modality Clinically managed high intensity residential				
Available Slots	Age/Gender None/CO-ED			
Statuses Rejected Closed Admitted	Selected Status(es) Pending Admission Referred			
Finish Search × Clear				
Client Waitlist List				
Waitlist ID $\!$	Pregnancy Due Date 🗸 Person who Us	es IV Drugs 🗸 Days Walting	Priority Score 🗸 Status 🗸	
471 Administrative Agency	Yes	7	2 Referred	
)

Figure 8: Client Waitlist List

After clicking on "Add Client to Waitlist", the Client Waitlist Profile screen will appear (see Figure 9)



Client Waitlist Profile

Agency Iowa Department of Public Health	Facility Residential	Age/Gender None/CO-ED
ASAM 3.5	Clinically managed high intensity residential	
Available Slots	Waitlist Status Referred	Date on Waitlist
Planned Date of Admission	Date of Admission	Closure Reasons
Phone Number	Client Name Type here to search Q	Unique Client Number
Gender	DOB	Last 4 of SSN
Pregnant 👻	Due Date	IV Drug User
Other Priority Options All Other Contract KY Pregnant/IV Users State Probation/Parole	Selected Priority Options	
Priority Score	How was the client informed of the disposition?	Is consent signed?
Rejection Reason		
Save Save and Finish × Cancel		

Figure 9: Client Waitlist List Profile



CLIENT WAITLIST PROFILE

In the Client Waitlist Profile (see Figure 9), the selected Agency/Facility/Program information will be greyed out. Enter the last name of the patient using the **Client Name** field. If the patient name does not appear, a **Client Profile** has not been created yet.

The user will complete the required fields (hard yellow) to complete the CLIENT WAITLIST PROFILE:

- Date on Wait List This field defaults to the current date and should not be changed.
- Client Name Enter the last name of the patient and IBHRS will return patient names in IBHRS. If last name does not appear, check to see if a Client Profile exists in IBHRS for the patient.
- Phone Number This may auto populate if provided in the Client Profile, if not, please enter the patient's phone number.
- IV Drug User If the patient reports using a drug(s) via IV Injection in the past 30 days, select "Yes."
- Pregnant If Gender equals "Female", select the appropriate response.
- Due Date If Pregnant equals "Yes", enter the due date as reported by the patient.
- How was the client informed of

the disposition? - Select the applicable option on communication of referral disposition to the patient.

Is consent signed? – To place a patient on the State Waitlist, a consent to the referred to program(s) must be signed.
 Selecting "No" will cancel the referral.

"Is Consent Signed?" Business Rule:

If the field "Is consent signed?" equals "No" or "Refused", the Client Waitlist Profile would not be created.

Exception: The exception to this rule is if the user is placing a patient on a local waitlist, meaning the agency on the Client Waitlist Profile matches the context agency.

Error Message: "Client cannot be added to this Waitlist without having a signed consent."

Client Waitlist Profile Facility Age/Gender Agency None/CO-ED Iowa Department of Public Residential Program Name Modality ASAM 3.5 Clinically managed high intensity residential Available Slots Waitlist Status Date on Waitlist 1/11/2022 🛅 25 Referred Planned Date of Admission Date of Admissio Closure Reasons Phone Number Client Name Unique Client Numbe (306) 159-4621 Q 8011020984 Brown, John Gender DOB Last 4 of SSN 11/2/1980 Male 0984 IV Drug User Due Date Pregnant • Other Priority Options Selected Priority Options All Other Contract Ø KY 3 Pregnant/IV Users State Probation/Parole Priority Score was the client info of the disposition? Is consent signed? In Person -Yes Save and Finish × Cancel Figure 11: Client Waitlist Profile - completed



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Once all fields are completed, click "Save and Finish". A prompt will appear to confirm the referral.

Are you sure you want to add Brown, John to the waitlist for Iowa Department of Public Health, Residential, ASAM the waitlist record.	3.5? Proceeding will lock
Yes × No	

Figure 12: Client Waitlist Profile confirmation

Clicking "Yes" will return the user to the **Client Waitlist** screen for the referred to Program. The next step is to add referral documentation to the referral.



DOCUMENT STORAGE

The IBHRS State Wait List includes the ability to add referral related documents to the referral for review by the referred to program.

lient Waitlist								
ency		F	acility					
wa Department of Public	Health		Residential					
gram Name								
AM 3.5								
dality								
inically managed high int	ensity residential							
ilable Slots		A						
i			None/CO-ED					
tuses			Selected Status(es)					
ejected			Pending Admission					
osed Imitted			Referred					
		v						
Finish Search Client Waitlist + Add Client to Waitlis	× Clear List							
Waitlist ID 🗸	Placed by Agency 🗸		Pregnancy Due Date 🗸	Person who Uses IV Drugs 🗸	Days Waiting	Priority Score 🗸	Status 🗸	
471	Administrative Agency			Yes	7	2	Referred	
470	Administrative Agency			Yes	6	2		
472					•	-	Referred	

Figure 13: Client Waitlist Screen after confirming referral

To add the referral documents (referral packet, <u>IDPH State Waitlist Cover Sheet</u>, <u>StateWaitlist Consent</u>, and other relevant documents) click on the three-dot ellipsis of the "Waitlist ID" and choose "Review" to view the **Client Waitlist Profile**. Click on Documents (see Figure 14).

IBHRS UAT				SSRS Reports	Documents (0)	Snapshot	: EP	Eric Preuss Administrative Agency, Administrative Unit	,
Home Page State Waitlist My Programs State Waitlist My Clients	Client Waitlist Profile	Faciny Residential	Apr/Gender None/CO-ED						
Desthoard	Program Name ASAM 3.5 Available Slots 25	Modainy Clinically managed high intensity reside Wattist Status Referred	ntial Date on Watlist 1/10/2022						
HRS Reporting Agency	Planned Date of Admission Phone Number (212) 212-2123	Date of Admission Client Name Bond, James	Closure Reasons						× I

Figure 14: Client Waitlist Profile – Document Storage



Documents Search...

referral_1pager

IDPH Statewide Waitlist Cover Sheet

Wait List Consent (March 2021)

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The **Documents** pop-up window will display (see Figure 15). The user may search or drag/drop the files to be attached to the **Client Waitlist Profile.**

Once a file is added, a new **Documents** window will appear (see Figure 16).

Ext. \checkmark Description \checkmark

.docx Cover Sheet

.pdf Referral Packet

.pdf Consent

A maximum of five files can be uploaded at one time. After each file is added to the list, enter a description for each uploaded file.

There are no documents uploaded. Drop files here or click to select files for upload (max 5 files at a time) x Close gure 15: Document Upload pop up window	Search (2		
Drop files here or click to select files for upload (max 5 files at a time) x Close gure 15: Document Upload pop up window	There are no documents uploaded.			
x close gure 15: Document Upload pop up window	Drop files here or click to select files for upload (max 5 f	files at a time	÷)	
gure 15: Document Upload pop up window	Y Cince			
	gure 15: Document Upload pop	up win	do	w

Figure 16: Client Waitlist Screen after confirming referral

When done uploading files, click "Close" and the number of documents uploaded (3) now shows next to the "Documents" hyperlink in the IBHRS header (see Figure 17).

Drop files here or click to select files for upload (max 5 files at a time)

Size(K) V Upload Date V Tags

1/17/2022

1/17/2022

1/17/2022

100kb

141kb

202kb

Figure 17: Document Number



CLIENT WAITLIST

Once the **Client Waitlist Profile** has been completed and submitted, the referral will show on the selected Program Waitlist and then the **Client Waitlist** screen displays (Figure 18).

Note: In Figure 18 example, two patients are currently on the waitlist for this program.

су		E	cility					
a Department of Public	Health	1	esidential					
ram Name								
AM 3.5								
ality								
ically managed high int	ensity residential							
able Slots		A	e/Gender					
		l.	lone/CO-ED					
ises			Selected Status(es)					
sed		۲	Referred					
nitted		0						
inish Search	× Clear							
Client Waitlist	List							
+ Add Client to Waitli	st							
					Dave			
Waitlist ID 🗸	Placed by Agency V		Pregnancy Due Date 🗸	Person who Uses IV Drugs 🗸	Waiting	Priority Score 🗸	Status 🗸	
471	Administrative Agency			Yes	7	2	Referred	
170	Administrative Agency			Yes	6	2	Referred	
4/2								

Figure 18: Client Waitlist

Use the Statuses "slider boxes" (see Figure 18) to filter the Client Waitlist List:

- Referred default status when referral made (patient added to a program waitlist).
- **Rejected** referred to program has rejected the referral (rejection reason given).
- Pending Admission referred to program has accepted the referral and scheduled an admission date.
- Admitted referred to program has admitted patient.
- Closed patient is no longer on the waitlist.

The Client Waitlist shows the Wait List ID, Placed by Agency, Pregnancy Due Date, Person who Uses IV Drugs, Days Waiting, Priority Score and Status. The Priority Score (determined by an algorithm) gives preference to priority populations (pregnant women, persons who inject drugs). Pregnant woman injecting drugs have the highest Priority Score. If two or more patients have the same Priority Score, then the patient who has the highest number of Days Waiting is listed higher on the waitlist.

1

To cancel a completed referral, the referring agency will open MY CLIENTS, find the referred patient, click on the "pencil" icon and choose "Delete". The user see this warning: *Are you sure you want to delete this client from the waitlist?*

Are you :	sure you want to delete this client from the waitlist?	
Yes	× No	

Clicking "Yes" will delete the referral(s) made for this patient.



MY CLIENTS

Selecting **My Clients** (Figure 19) under **State Waitlist** in the IBHRS Menu, the **Client Waitlist Search** screen will appear showing all referred patients from the agency and their status (Figure 20).

≙	State Waitlist
Home Page	My Programs
	My Clients
State Waitlist	

Figure 19: State Waitlist - My Clients

Figure 20 shows the **Client Waitlist Search** and options that are available to filter the **Client Waitlist** List. Use the **Statuses** "slider boxes" to filter the **Client Waitlist List**.

Client Waitlist Search									
Client First Name	Client Last Name	Unique Client Number							
Waitlist ID	Agency	Program Name							
Modality			•						
Statuses Rejected Closed Admitted	Selected Status(ee) Pending Admission Referred								
Days Waiting	Pregnant	HIV							
IV Drug Use									
Finish Search × Clear									
Client Waitlist List									
Waitlist ID 🗸 Client Name 🛇	Agency/Fac	sility 🗸	Program Name 🗸	$_{\rm Waiting}^{\rm Days} \sim$	Priority Score 🗸	Person who Uses IV Drugs 🗸	Pregnancy Due Date 🗸	Status 🗸	
471 Bond, James	Iowa Department of Public Health/Re	sidential	ASAM 3.5	7	2	Yes		Referred	:
472 Brown, John	Iowa Department of Public Health/Re	sidential	ASAM 3.5	6	2	Yes		Referred	
414 Test, Amber	Alcohol and Drug Dependency Service	e/ADDS Residential Tx	ASAM 3.5	473	0	No		Referred	+
415 Test, Ana	Alcohol and Drug Dependency Service	e/ADDS Residential Tx	ASAM 3.5	473	0	No		Referred	

Figure 20: Client Waitlist Search and List



MY PROGRAMS

For Agencies that have Programs that are participating on the State Waitlist, selecting **My Programs** under **State Waitlist** in the IBHRS Menu will open the Program Waitlist Search screen (see Figure 22)



Figure 21: My Programs

Figure 22 shows the **Program Waitlist Search** and options that are available to filter the **Program Waitlist List**. Use the **Statuses** "slider boxes" to filter the **Program Waitlist List**.

Program Waitlis	Search								
Waitlist ID		Facility	Program Nar	me					
Modality				•					
Statuses Rejected Closed Admitted		s 0 0	elected Status(es) Pending Admission Referred						
Available Slots									
Finish Search	× Clear								
Program Waitl	st List								
Waitlist ID 🗸	Program 🗸	Placed by Agency 🗸	Client Name 🗸	Pregnancy Due Date 🗸	Person who Uses IV Drugs \smallsetminus	Days Waiting 🗸	Priority Score 🗸	Status 🗸	
471	ASAM 3.5	Administrative Agency	Bond, James		Yes	7	2	Referred	÷
472	ASAM 3.5	Administrative Agency	Brown, John		Yes	б	2	Referred	÷

Figure 22: Program Waitlist Search and Program Waitlist List



REVIEWING AND UPDATING A REFERRAL

Upon email notification of the referral made, the referred to program will review and update the status of the referral. To review or update a referral, click the three-dot ellipsis and select "Review" which will open the selected **Client Waitlist Profile** (See Figure 23).

IBHRS 21.4.1	UAT				SSRS Reports Documents (3)
Home Page My	te Waitlist ly Programs ly Clients	Client Waitlist Profile	Facility Residential	Program Name ASAM 3.5	
IBHRS Reporting Agency Client List		Modality Clinically managed high intensity residential Waitiet Status Date of Admission Other Priority Options All Other Contract KY Pregnant/IV Users State Probation/Parole	Date on Waitlist 1/10/2022 Closure Reasons Closure Reasons Closure Comparison Option	Available Slots 25 Planned Date of Admission Phone Number (212) 212-2123	
System Administration Reports Support Ticket	liont Waitlist	Priority Score 2 Rejection Reason Save Save and Finish × Cancel Profile	How was the client informed of the disposition?	Is consent signed? Yes	
rigure 23: C	ilent waitlist	Prome			

To download and view the referral documents, click on "Documents" at the top of the Client Waitlist Profile.

Upon review of documents and contacting the referred patient, the referred to program will update the **Waitlist Status**. There are three options:

- **Rejected** Referral was not accepted. A rejection reason must be provided.
- **Pending Admission** Referral was accepted and pending admission scheduled.
- Planned Date of Admission projected date of admission to the program.
- Admitted Referral admitted.
 - **Date of Admission** date referral admitted. Entering a date closes the waitlist entry and closes any other open State Waitlist referrals for the patient.
- **Closed** the referred to program will choose this option if one of the following happens:
 - Pending Admission at another program
 - o Unable to locate the patient/patient refuses treatment
 - Patient did not show. .

Programs are to update the Client Waitlist Profile upon each change in Waitlist Status



STATE WAITLIST NOTIFICATIONS

The State Waitlist generates email notifications at four different times during the State Waitlist process. Users at the referring and referred to agencies with the Cross Agency Waitlist Management role will receive these email notifications as applicable.

- 1. Referral Made: When a patient is placed on a program/agency's Waitlist (referred to program)
- 2. Pending Admission: When a patient is pending an admission date. (referring program)
- 3. Admission: When a patient is admitted (referring program)
- 4. Closure: When a patient's waitlist status is closed (referring program)

Figure 24 below is an example of what a notification email will look like.



Figure 24: Email Notification Example

TECHNICAL ASSISTANCE

For questions regarding the IBHRS State Waitlist Guide or for technical assistance in the management of participating waitlist programs (edits, adding new, etc.), please contact the SAPG Data Helpdesk at (<u>sapgdata@idph.iowa.gov</u>).