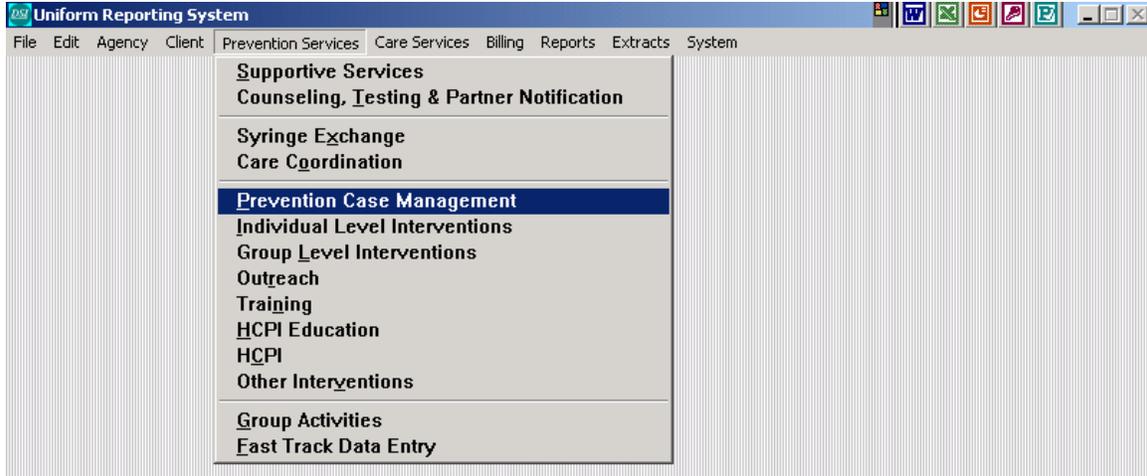
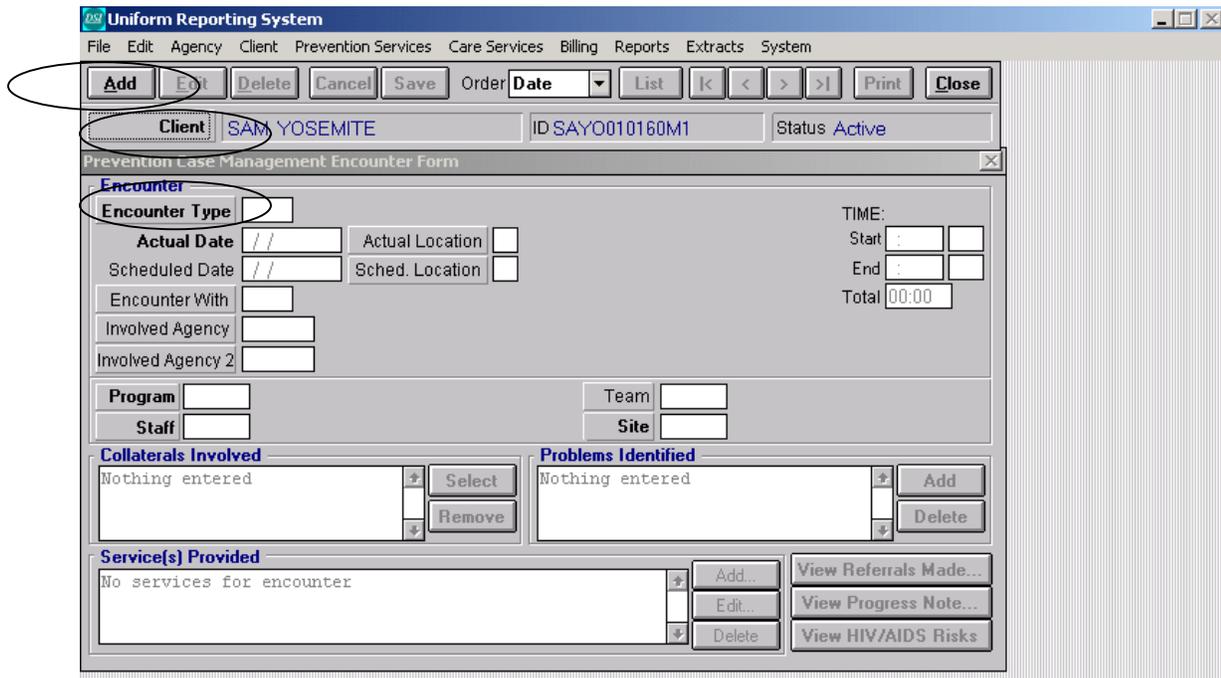


How to enter a Screening / Intake Encounter

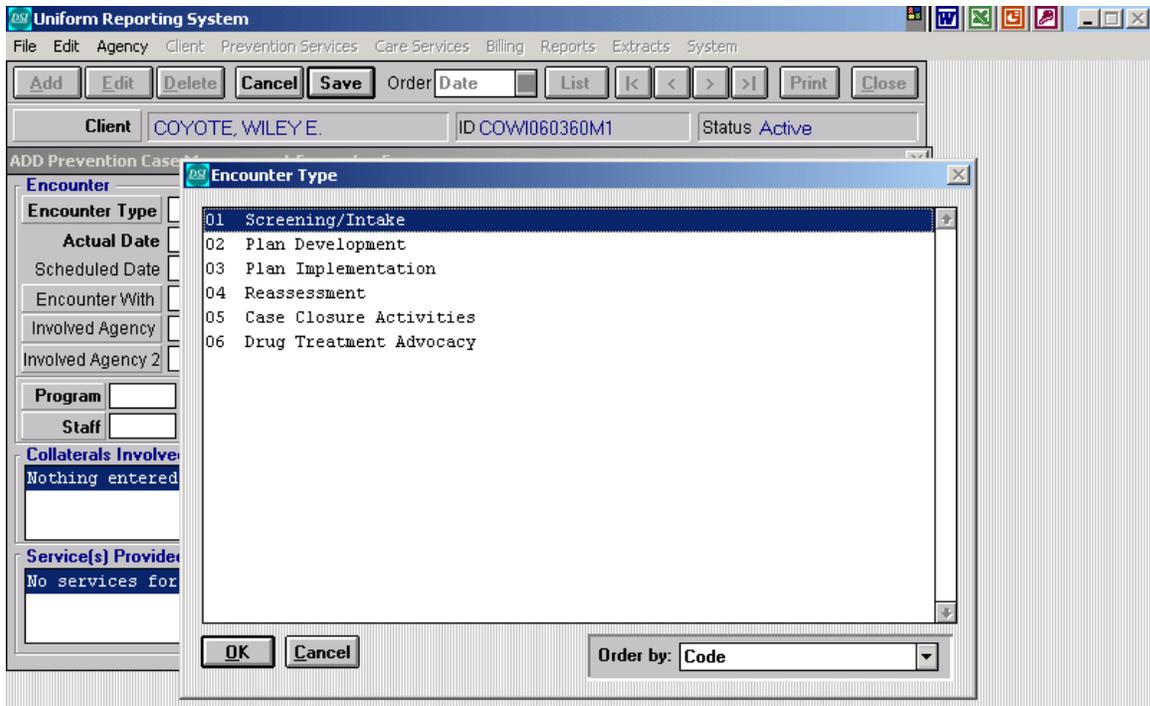
Each client must be already entered into URS before any Prevention Case Management encounters can be entered.



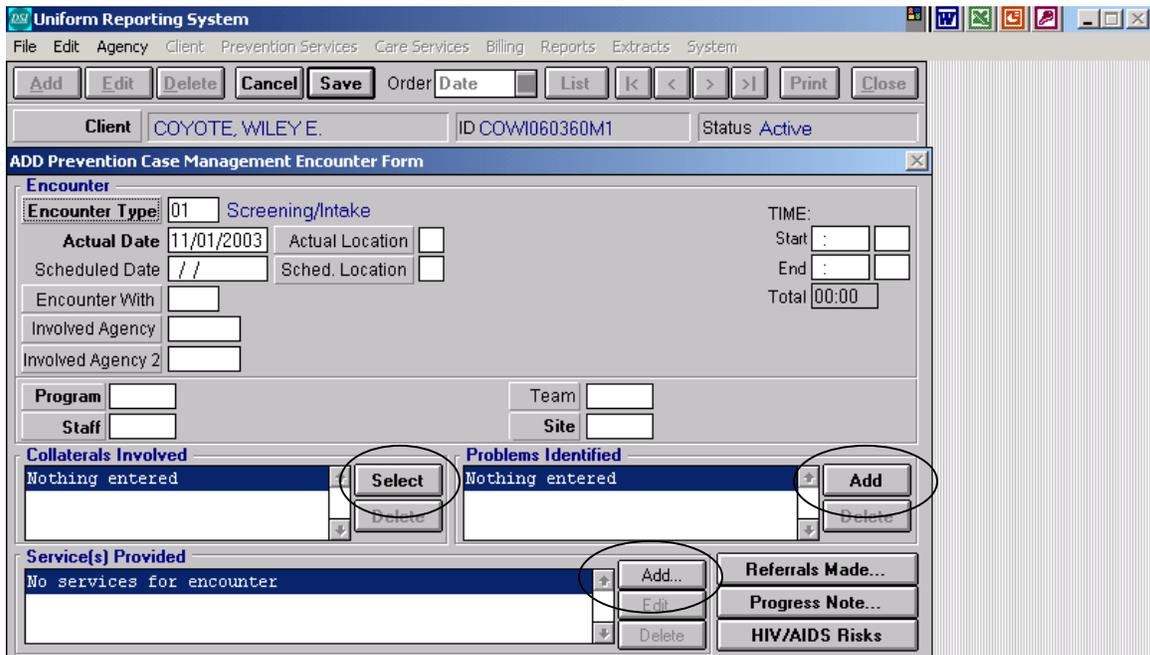
1. Press **Prevention Services** menu
2. Select **Prevention Case Management**



3. Press **Client** button
4. In the **Select a Client** screen, press **List** button
5. Select a client from the client list and press **OK**
6. Back in the **Prevention Case Management Encounter Form**, press **Add** button to add encounter
7. Press **Encounter Type** button



1. Select **01 Screening/Intake** in the **Encounter Type** screen



2. Enter bold fields, including **Actual Date**, **Program**, **Staff**, **Site**
3. Enter any **Collaterals Involved** by pressing **Select** button. Collaterals have to be entered at client intake.
4. Enter any **Problems Identified** by pressing **Add** button
5. Under **Service(s) Provided** press **Add** button

1. In **Services Provided** screen, press **Activity Code** button to access activity codes defined below:

PCM/Screening/Intake ACTIVITY CODES DEFINITIONS

0021 Client Recruitment and Engagement- The process of identifying, approaching, and developing a trusting and professional relationship with individuals who might be appropriate clients for the program.

0022 Screening and Assessment- The process to determine a client's needs for services and assistance. The assessment process serves as the basis for assisting the client in the formulation of a plan to reduce risk.

0023 Client Enrollment/Intake- The process to obtain demographic information and other pertinent data and consents from the client. This information will be used by the agency to assist the client with his/ her needs and for reporting purposes to funding sources.

0024 Study Enrollment- This would be used for clients who are being enrolled in a study. This will not be applicable for most prevention case management programs funded by DPH.

Uniform Reporting System

File Edit Agency Client Prevention Services Care Services Billing Reports Extracts System

Add Edit Delete Cancel Save Order Date List < > >> Print Close

Client COYOTE, WILEY E. ID COWI060360M1 Status Active

ADD Prevention Case Management Encounter Form

Encounter

Encounter Type 01 Screening/Intake TIME: Start: [] []

Actual Date 11/01/2003 Actual Location []

Scheduled Date [] []

Encounter With []

Involved Agency []

Involved Agency 2 []

Program []

Staff []

Collaterals Involved

Nothing entered

Service(s) Provided

No services for encounter

Services Provided

Service

Activity Code []

Time Start [] [] Time End [] [] Time Spent 00:00

How Provided []

Location []

Outcome []

Staff []

Value 0.00

Of Items 0

Remarks... OK Cancel

1. Enter **Time Start** and **Time End**
2. Press **Location** to select location where the Screening/Intake encounter took place
3. Enter **Outcome** to select an outcome
4. Enter **Staff** to select a staff member who performed the Screening/Intake
5. Press **OK** exit **Services Provided** screen
6. In main encounter form, press **Referrals Made** button

Uniform Reporting System

File Edit Agency Client Prevention Services Care Services Billing Reports Extracts System

Client FUDD, ELMER T. ID FUEL060460M1 Intake Date 05/01/2003 Age 43 Close

Referral Information for FUDD, ELMER T.

No referrals found

Service Need

Category []

Service []

Priority []

Referral Information

On Site [Y/N] [N]

Referred To []

Date Need Identified [] []

Date Referral Made 01/11/2003

Date Service Verified [] []

Status []

Appointments Per Week 0

Appointments Being Kept [Y/N] [N]

Add Edit Delete Print Form OK Cancel

1. Press **Add** button
2. Fill in bold fields on right side of screen including **Category, Service, On Site (Y/N), Date Referral Made**
3. Under **Referral Information** press **Referred To** button to select organization where the client was referred

4. Press **Status** button to select a status of the referral
5. Press **OK**
6. Press **Close**
7. Press **Save** on main encounter form