



Consents and Referrals

Referrals and consents are frequently completed together. This Tip Sheet describes the complete process, from creating a Consent Disclosure template, to preparing a consent, to referring a client and finally, accepting a client referral.

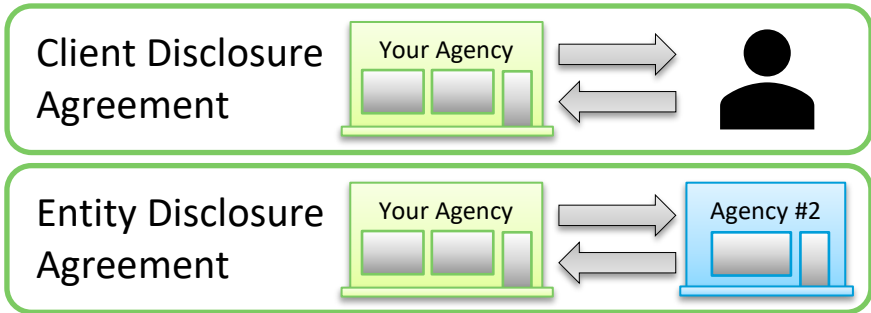
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Consents

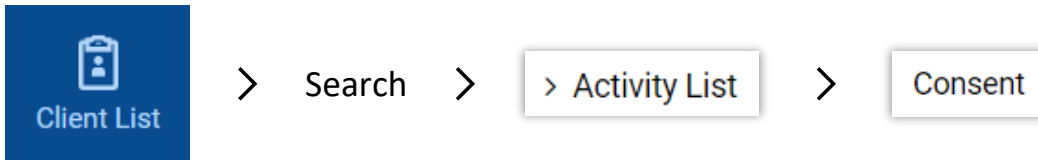
A **Client Disclosure Agreement (Consent)** is **required** before sharing information with any other entity and is between one client and one entity (such as your agency).

In addition, there is another type of **Disclosure Agreement** in UWITS which is called an **Entity Disclosure Agreement** (also called **Agency Disclosure Domains**). These are **optional** and are between your agency and another entity (such as another agency). They act as templates that can simplify creation of **Client Disclosure Agreements**.



Consents are required before sharing any information about a client with anyone outside the agency.

Note: Consenting to IGS for a UCE requires both Consent and a Referral.



Begin by navigating to the Client List. Search for the Client then click on Activity List then Consent. The Client Consent List screen shows previously created Consents for the client.

Create a New Client Consent Record
Once it has been determined that a new consent is needed, click on **+ Add New Client Consent Record** at the top left of the Client Consent List screen.

There may be several consents already on record. Will an existing consent suffice? Ensure that it has not been revoked. If it has been revoked, it will be noted in the **Status** column.

The screenshot shows the 'Client Consent List' interface. At the top left, there is a '+ Add New Client Consent Record' button. Below it is a table with columns: Start Date, Disclosed To, Status, Signed?, and a vertical ellipsis. The table contains six rows of consent records.

Start Date	Disclosed To	Status	Signed?	
4/1/2014	FEI Testing - Provider Agency	Active	Yes	⋮
8/11/2014	Administrative Agency	Active	Yes	⋮
7/26/2012	Fourth Street Clinic	Active	Yes	⋮
7/1/2012	Fourth Street Clinic	Active	Yes	⋮
7/1/2009	SLCo Outreach Unit	Active	Yes	⋮
7/14/2009	Asian Association	Active	Yes	⋮

Completing the Client Disclosure Agreement




There are two methods for completing a **Client Disclosure Agreement (Consent)**. The simplest option is to fill in each box. However, there is a faster way. Your Navigator can setup a template in advance. These templates are

called an **Entity Disclosure Agreement**. See page 19 for instructions to create one of these handy templates.

Once setup, template options will be available in the **Entities with Disclosure Agreements** drop-down box.

Selecting a template will automatically fill several boxes. These may include **System Agency**, **Disclosed to Agency**, **Facility** and **Disclosure Selection** boxes.

Whether selecting a template or filling in each box manually, for the Consent to be complete, all of the following boxes must be filled in:

- (1) Select the agency to which client information is to be shared in the **Disclosed to Agency** box.
- (2) If the agency is not listed then select **No** from the **System Agency** box then enter the name of the agency (or other entity) in the **Disclosed To Entity (Non System Agency)** box.
- (3) Select the name of the facility (or select All Facilities) in the **Facility** box.
- (4) Select an **Expiration Type** for each, adding any other required criteria.
- (5) Carefully select the relevant **Client Information Options** and then use the  button to move to the **Disclosure Selection** box.



Enter the **Purpose for Disclosure**.

The screenshot shows the 'Client Disclosure Agreement' form. A dashed blue box highlights the top section containing: 'Entities with Disclosure Agreements' (dropdown), 'System Agency' (radio buttons for Yes/No), 'Disclosed To Agency' (dropdown), 'Facility' (dropdown), 'Disclosed To Entity (Non System Agency)' (text input), 'Purpose for Disclosure' (text input), and 'Earliest Date of Services to be Consented' (calendar icon). A yellow callout box points to the 'Client Information To Be Consented' section, which includes an 'Expiration Type' dropdown and a list of 'Client Information Options' (Admission, ASAM, ASAM Tx Plan, Behavioral Health Assessment, Client Information (Profile), Client Screening, Consent, CONTINUUM™, Court Living Situation, Court Medication Assisted Treatment, DENS ASI Assessment). A right arrow button is shown next to this list. Another yellow callout box points to the 'Disclosure Selection' area. A third yellow callout box at the bottom right contains a note: 'Note: When creating a consent to an agency for the very first time, the message "No Agency Consent Policy Exists" will appear. Continue on with your agency selection as this will not impede the consent.' The form also has 'Comments' and 'Other Disclosures' sections at the bottom.

Earliest Date of Services to be Consented

Calendar icon and input field for date selection.

Selecting the Correct Dates

The **Earliest date of services to be consented** defaults to the current date; however, select this date carefully! This date must be the date of the earliest activity to be consented.

Client Activity List

Activity	Activity Date	Created Date	Status
Client Information (Profile)	7/8/2020	7/8/2020	Completed
Intake Transaction	7/8/2020	7/8/2020	Completed
Admission	7/9/2020	7/9/2020	Completed
Encounter Summary	7/9/2020	7/9/2020	Completed
Discharge	7/9/2020	7/9/2020	Completed
Outcome Measures - Client Status	7/9/2020	7/9/2020	Completed
Diagnosis Summary	7/9/2020	7/9/2020	Not Applicable
Miscellaneous Note Summary	7/31/2020	7/8/2020	Not Applicable

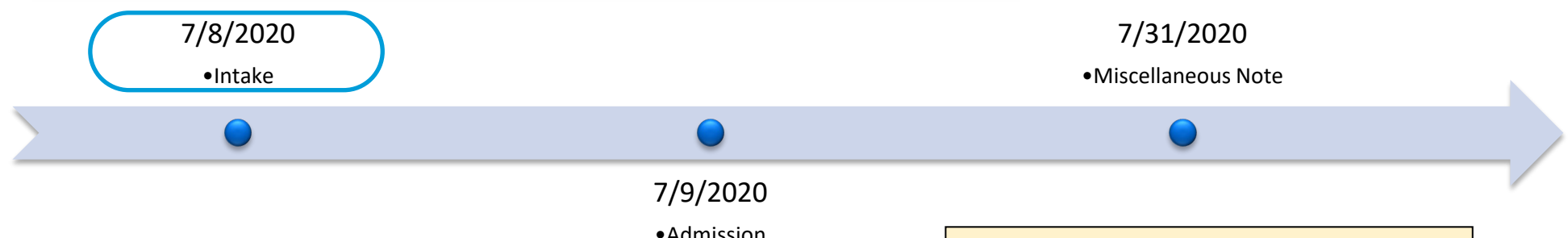
It may be helpful to sort the **Activity List** in order by Activity Date by clicking on the column header for that column until the triangle indicator points downward.

Example Dates

For example, the Intake, Admission, and Miscellaneous Note for a client need to be consented to the Administrative Agency.

- Intake dated 7/8/2020
- Admission dated 7/9/2020
- Miscellaneous Note Summary dated 7/31/2020

Therefore, the **Earliest date of services to be consented** must be 7/8/2020 for the agency to see the intended information.



Miscellaneous Note Summary Activity List shows the most recent Misc Note date. Encounter Note Summary are listed the same.

Client Information To Be Consented
 *Expiration type is required for disclosure activities.

Expiration Type: Discharge(UD) + Days:

*Expiration type is required for Disclosure activities.

Client Information Options:

- ASAM
- ASAM Tx Plan
- Behavioral Health Assessment
- Client Screening
- Consent
- CONTINUUM™
- Court Living Situation
- Court Medication Assisted Treatment
- DENS ASI Assessment
- DENS ASI Lite
- Diagnosis List


Disclosure Selection:

- Admission (DS, +10)
- Client Information (Profile) (UD, +30)
- Intake Transaction (UD, +30)
- Miscellaneous Note Detail (UD, +30)

Client Information to Be Consented

The box labeled **Client Information Options** shows client information that can be shared. As these options are selected, an expiration date must be associated with each option. An **Expiration Type** may be selected to determine when each **Client Information Option** expires.

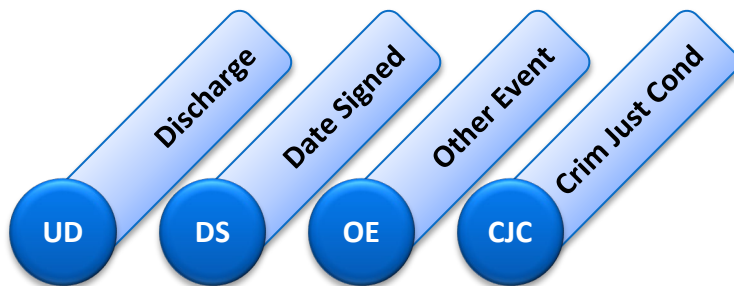
Click on the **Client Information Options** to be shared with the agency. You may hold the Ctrl key to select multiple Client Information options at once.

Then select the appropriate **Expiration Type** from the drop down box for the selected **Client Information Option** (or options) from the box. Click on the  button to move the selections to the **Disclosure Section** box.

To consent the signed note portion of a **Miscellaneous Note** or a **MH Encounter Note** then **Allow Disclosure** must equal **Yes**.

To consent the signed note portion of an **SUD Encounter Note** then **Release This Note?** must equal **Yes**.

Otherwise, only the Profile information for the note will be consented.



Expiration Types

The most common **Expiration Types** are **Discharge** and **Date Signed**.

When **Discharge** is selected, the consent will expire based on the date of discharge plus the number of days entered. To select expiration on the day of discharge itself, enter zero for **+Days**. **UD** stands for upon discharge.

When **Date Signed** is selected, the consent will expire based on the Consent Date plus the number of days entered. **DS** stands for date signed.

Alternative Expiration Types

Other Event – The consent will expire based on the specific event. The user must specify the date of expiration. The user must give details of the specific event in the **Description** box. **OE** stands for other event.

Criminal Justice Conditions – The consent expires based on a pre-determined expiration date associated with the Criminal Justice System. The user must enter in the **Description** box. **CJC** stands for Criminal Justice Conditions.

Client Disclosure Agreement

▼ Show Context Information

Entities with Disclosure Agreements

FEI Testing - Provider Agency

System Agency

Yes No

Disclosed To Agency

FEI Testing - Provider Agency

Facility

All Facilities

Disclosed To Entity (Non System Agency)

Purpose for Disclosure

Testing

Earliest Date of Services to be Consented

1/1/2004

Has the client signed the paper agreement form

Yes No

Date Client Signed Consent

Client Information To Be Consented

*Expiration type is required for disclosure activities.

Expiration Type

Date Signed(DS)

+ Days

*Expiration type is required for Disclosure activities.

Client Information Options

ASAM
ASAM Tx Plan
Behavioral Health Assessment
Client Information (Profile)
Client Screening
Consent
CONTINUUM™
Court Living Situation
Court Medication Assisted Treatment
DENS ASI Assessment
DENS ASI Lite

Disclosure Selection

Admission (DS, +20)
Discharge (UD, +90)

These are the elements the client is agreeing to consent. Only elements existing in the episode and are within the date parameters will be consented.

Preparing the Paper Form for Signature

Data **must not** be transferred until the paper form has been signed and filed.

1

To capture a signature, first click on the **Save** button to save the consent.

2

Next, click on the **Generate Report** link at the top, right side of the screen.

3

Once the client has signed the paper agreement form then select **Yes** from the box

labeled **Has the client signed the paper agreement form?**

Finally, enter the date that the client signed the agreement form.

Until these fields are completed, the consented information will not be available to view.

Click on the **Save** button to save the consent.

After clicking **Finish**, the screen is grayed out and nothing can be added or deleted from the **Client Disclosure Agreement**.

Revoking a consent ends all further sharing.

Revoking a Consent

A client may revoke a Consent at any time prior to its expiration. Navigate to the **Client Consent List**. Hover over the action button (⋮) then click on **Review**.

Revoke

Click on the **Revoke** button at the bottom of the Client Disclosure Agreement screen.

The status of the consent will change to **Revoked** in the Activity List.

Revocation is not retro-active. Whatever was already shared between agencies prior to revocation is not subject to non-disclosure.

Revoke cancels further information from being consented but doesn't remove the information already consented.

Start Date	Disclosed To	Status	Signed?	
5/6/2013	SLCo Outreach Unit	Active	Yes	⋮
1/1/2013	Asian Association	Revoked	Yes	⋮
4/1/2014	Clinical Consultants	Active	Yes	⋮

Tip! The date that you revoke a consent is called the **Revoke Date**. Revoking a consent ends the sharing of data which is dated on or after the **Revoke Date**. However, revoking the consent does not necessarily end sharing of all data.

Newly added instances of any of the elements included in the **Disclosure Selection** box will be shared if they are dated between the **Earliest Date of Services to be Consented** and prior to the **Revoke Date** even if they are not entered into UWITS until after the **Revoke Date**.

Please note that the **Revoke Date** is not displayed in UWITS. However, you can access this date via the SSRS Reporting module.

Viewing Consents from Outside Agencies

When a client has been consented to your agency, review their consented activities by searching for the client at the **Client Search** screen.

To enable this ability, a user must be assigned the **View Consented Clients** role.

Below the Client List box there is an additional box labeled **Consents from Outside Agencies**.

Find the relevant client then hover over the action button (⋮) and click on **Activity List** to view the consented information.

Each agency's consented activities must be viewed separately.

To Link a Consent

To link the consented information to an existing client, hover over the action button (⋮) and click on **Link**.

Tip! Use the Advanced Search options to select where to include only active consents in the search results.

Include Only Active Consents

Yes No

Client Search

Facility First Name Last Name Unique Client Number

Client List

Full Name	Unique Client #	SSN	
BROWN, Charlie 5/11/1990 Male	C9B051190M	125-87-7894	⋮
BROWN, Cleveland 6/4/1964 Male	C9B060464M	999-99-9999	⋮

Clients with Consents from Outside Agencies

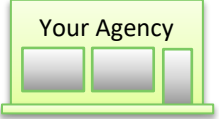
Full Name	Agency	Unique Client #	SSN	
BROWN, Leroy 8/15/1986 Male	FEI Testing - Provider Agency	L9B081586M	111-22-2333	⋮
BROWN, Paddington 1/1/2005 Male	Asian Association	P9B010105M	999-99-9999	⋮

Referrals

Referral records are viewable by both the sending and the receiving agency. That same record is found on different screens, depending on the perspective of your agency:

Referrals OUT 

The agency making the referral is referring a client OUT to another agency. This action is accessible from the **Activity List**.

Referrals IN 

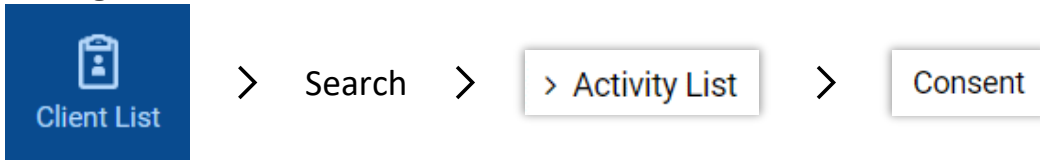
The agency accepting the referral is accepting the referral IN to the agency. This action is completed in the **Agency** section of UWITS.



Referrals Out

Before beginning, all referrals to another agency **require** that a Client Disclosure Agreement (Consent) be completed and signed by the client before an agency can share any information about the client with anyone outside the agency. See page 2 for more information.

Creating a new Referral Out from a Consent



There are three methods for creating a Referral Out:

- Create a new Consent then create a Referral from that,
- Create a new Referral from an existing Consent, or
- Create a new Referral and select to use an existing Consent.


Navigate to the **Client List**, search for the Client then click on **Activity List** then **Consent**. The **Client Consent List** screen shows previously created Consents for the client.

Before using an existing Consent, ensure that it has not been revoked by checking the **Status** column. Revoked consents will have a status of **Revoked**.

To use an existing Consent, Hover over the action button (⋮) then select **Review**.

To create a new Consent, click on the link **+ Add New Consent Record** and follow the instructions on page 3.

Client Consent List				
Start Date	Disclosed To	Status	Signed?	
5/6/2013	SLCo Outreach Unit	Active	Yes	⋮
1/1/2013	Asian Association	Revoked	Yes	⋮
4/1/2014	Clinical Consultants	Active	Yes	⋮

Review 

Client Disclosure Agreement

+ Create Referral Using this Disclosure Agreement

^ Hide Context Information

Note: Consented information may not be redisclosed.

Client Name Crunch, Captain	Unique Client Number C9C050680M	Disclosed From Agency Administrative Agency
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Entities with Disclosure Agreements
All Other Agencies

System Agency
Yes

Disclosed To Agency
Clinical Consultants

Facility
All Facilities

Disclosed To Entity (Non System Agency)

Purpose for Disclosure
Testing

Earliest Date of Services to be Consented
4/1/2014

Once a Consent has been created and signed, clicking on the link **Create Referral Using this Disclosure Agreement** will create a **Client Referral** using the details on the Consent screen, pre-populating many of the fields.

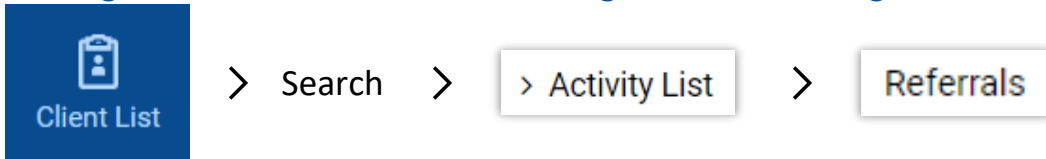


This also works for previously created consents. Identify the correct Consent at the **Client Consent** list. Hover over the action button (⋮) then select **Review**.

Finally, click on the same link as above, **Create Referral Using this Disclosure Agreement**, to create a **Client Referral**.

Skip to page 11 for instructions on how to fill-in the Referral screen.

Creating a new Referral Out and Selecting to use an Existing Consent



To create a new Referral Out, navigate to the Client List, search for the Client then click on Activity List and finally, click on Referrals.

Click on the link **+ Add New Client Referral Record**.

The next screen that appears will be the **Referral** screen.

Client Referral List

+ Add New Client Referral Record

Name	Referred To Agency	Referred To Facility	Non System Agency	Referred To Modality	Referral Status
Crunch, Captain	SLCo Outreach Unit	Assessment and Referral Unit		Assessment Only	Placed/Accepted

Referral

Referred By

Agency

Administrative Agency

Facility

Administrative Unit

Staff Member

Roach, Brian, LCSW-C

Program

State Reporting Category

Reason

Client declined

If Other

Is Consent Verification Required?

Yes No

Is Consent Verified?

Yes No

Continue This Episode of Care?

Yes No

The Referral Screen

Complete all required fields.

Referred By

Agency, Facility, and Staff Member will be pre-populated and marked read-only.

- Completing the **Program** field is only required when **Continue This Episode of Care** is **Yes**.
- At the **Reason** drop-down box, select the reason that the client is being referred to this agency.
- Client consent verification is **always required**. Select **Yes** from the **Is Consent Verification Required?** drop-down box. Once the client's consent has been verified, also select **Yes** from the **Is Consent Verified?** drop-down box.
- Will the episode of care be continued? Select either **Yes** or **No** from the **Continue This Episode of Care?** drop-down box. If **Yes**, the client must be enrolled in a program. Note: Enter "No" for request of Unique Client Eligibility (UCE) from IGS.

Tip! It is wise to keep an eye on the radio buttons at the left side of the screen to ensure that the selected values remain constant when moving through this screen.

Comments

Referral Status

Placed/Accepted

Referral Date

5/6/2013

Projected End Date

Created Date

5/6/2013 6:19 PM

Save Save and Finish × Cancel

Additional Referral Details

The **Comments** field is a two-way window. Once the client **Referral** has been saved, any comments can be seen by the facility to which the client is being referred.

Referral Status is auto-populated with "Referral Created/Pending" and **do not change**. This is for the receiving entity to track internally.

Update **Referral Date** and **Projected End Date** as needed.

The Agency to which the client is being referred will appear at the Agency's **Referrals In** screen.

Referred To

Select the relevant item from the **Signed Consents** drop-down box, after which **Agency** and **Consents Granted** will be filled in and marked Read Only. Select the relevant **Facility** and **Program** from the drop-down boxes.

An Appointment Date can be added to the **Appt Date** field.

When referring to a **Non-System Agency**, enter the name of the Agency into the text box. If so, **Modality** and **Specifier** are also required.

Referred To

Signed Consents
SLCo Outreach Unit

Agency
SLCo Outreach Unit

Facility
Assessment and Referral Unit

Staff Member

Program
01_1.0_A&R Svcs (I)

State Reporting Category
Youth/Family outpatient

Non-System Agency

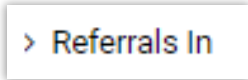
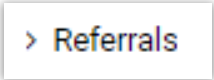
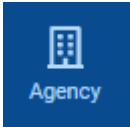
Non-System Modality

Non-System Specifier

Appt Date

Consents Granted
Consent Date:5/6/2013
Disclosure Domains:
Client Information (Profile) (DS, 5/6/2013)

Referrals In



Start at the Agency section to manage client referrals into your agency. Click on **Agency** at the Navigation bar to the left, then select **Referrals**. Next, select **Referrals In**.

Referrals In Search

Referral Status Codes

- Placed/Accepted
- Referral Created/Pending
- Referral Terminated
- Refused Treatment
- Rejected by Program
- Wait List

Search Criteria



Unique Client Number

First Name

Last Name

Created Date

Referred Date

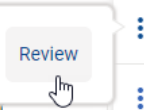
Search

× Clear

Referrals for Administrative Unit

Export

Unique Client #	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Refer Comm
B9G010234F	Gordon, Barbara	1/2/1934	11/18/2008	SLCo Outreach Unit/Assessment and Referral Unit	Amb. Intensive Outpatient	Placed/Accepted	Administrative Unit	⋮
S9R021980F	Reeves, Sarah	2/19/1980	12/9/2009	FEI Testing - Provider Agency/Testing Facility 1	Amb. Outpatient	Placed/Accepted	Administrative Unit	⋮
L9R050555F	Ricardo, Lucy	5/5/1955	1/12/2010	HouseofHope/House of Hope (SLC)	Amb. Outpatient	Placed/Accepted	A U	⋮
I9D021490F	Dreenk, Ineda	2/14/1990	7/1/2010	VOA_Archive/Center for Women and Children	Amb. Outpatient	Placed/Accepted	A Unit	⋮



To search for referrals, select the desired **Referral Status Codes** and move them to the **Search Criteria** box using the button. Alternatively, use the **Search Criteria** boxes, such as Client ID, Create Date, Referred Date, First Name and Last Name. Then click the **Go** button.

This will show a list of clients referred into your facility with the selected status code(s) or search criteria. To view a referral, hover over the action button (⋮) then click **Review**. This will show the **Referral** screen, including the shared Comments field.

Comments

Referral Status

Referral Created/Pending

Projected End Date

Created Date

6/6/2022 9:12 AM

Save and Finish

Cancel

To accept a referral, under **Referral Status** select **Placed/Accepted**.

Once **Referral Status** has been set to **Placed/Accepted** and then saved, it will be grayed out and can no longer be modified.

An Appointment Date can be added to the **Appt Date** field.

Alternatively, another **Referral Status** may be selected. There are several to choose from. Any of these can be modified later.

Referral Status

Referral Created/Pending

Placed/Accepted

Referral Created/Pending

Referral Terminated

Refused Treatment

Rejected by Program

Wait List

To view the information the referring agency agreed to share, check the **Consents Granted** box. Please note, watch for a scroll bar in this box. Scroll down to see the complete list, if needed.

Click the **Finish** button.

This client results in a Unique Client Number (P9B010180F) that already exists in your agency. Please review the following information and select the appropriate action: ✕

New/Referred Client Information

[Different Client](#)

Name	Date of Birth	SSN	Address	Phone	Alternate Names
Beazley, Pam	1/1/1980	999-99-9999			The Office

Existing Client(s) Information

Name	Date of Birth	SSN	Address	Phone	Unique Client #	Alternate Names
Box, Pandora	1/1/1980	000-00-0000			P9B010180F	Same Client ⋮

✕ Cancel

If the client is different, click on the **Different Client** link. The new client will be created and the second digit of the Client ID will differentiate the two clients.

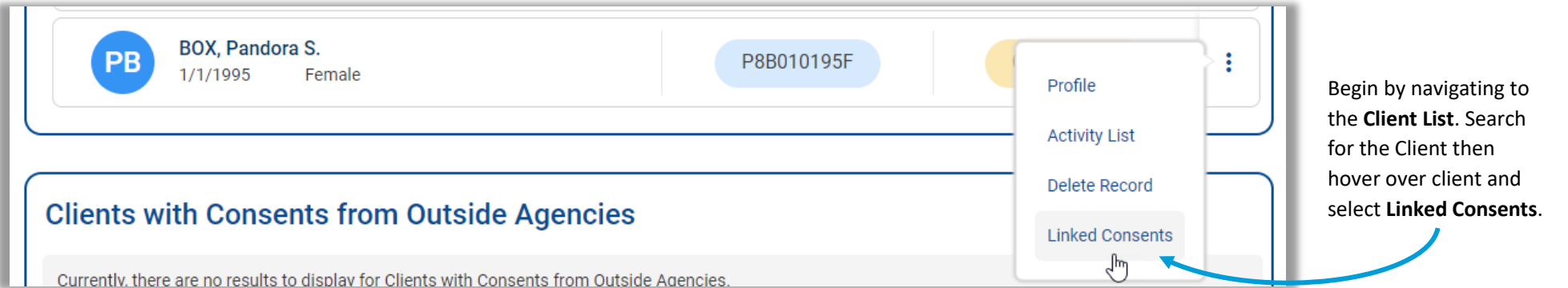
If the client is the same, hover over the action button (⋮) and click on the **Same Client** link.

After clicking the **Finish** button, ordinarily UWITS will copy the profile information into your agency, then will display the Client Profile screen. Follow your agency procedures for verifying the client data.

However, when a client being referred to your agency has the same first and last initials, date of birth and sex as a previously existing client at your agency, a warning message will be displayed. Determine whether the new client is the same or different than the existing client.

Linked Consents

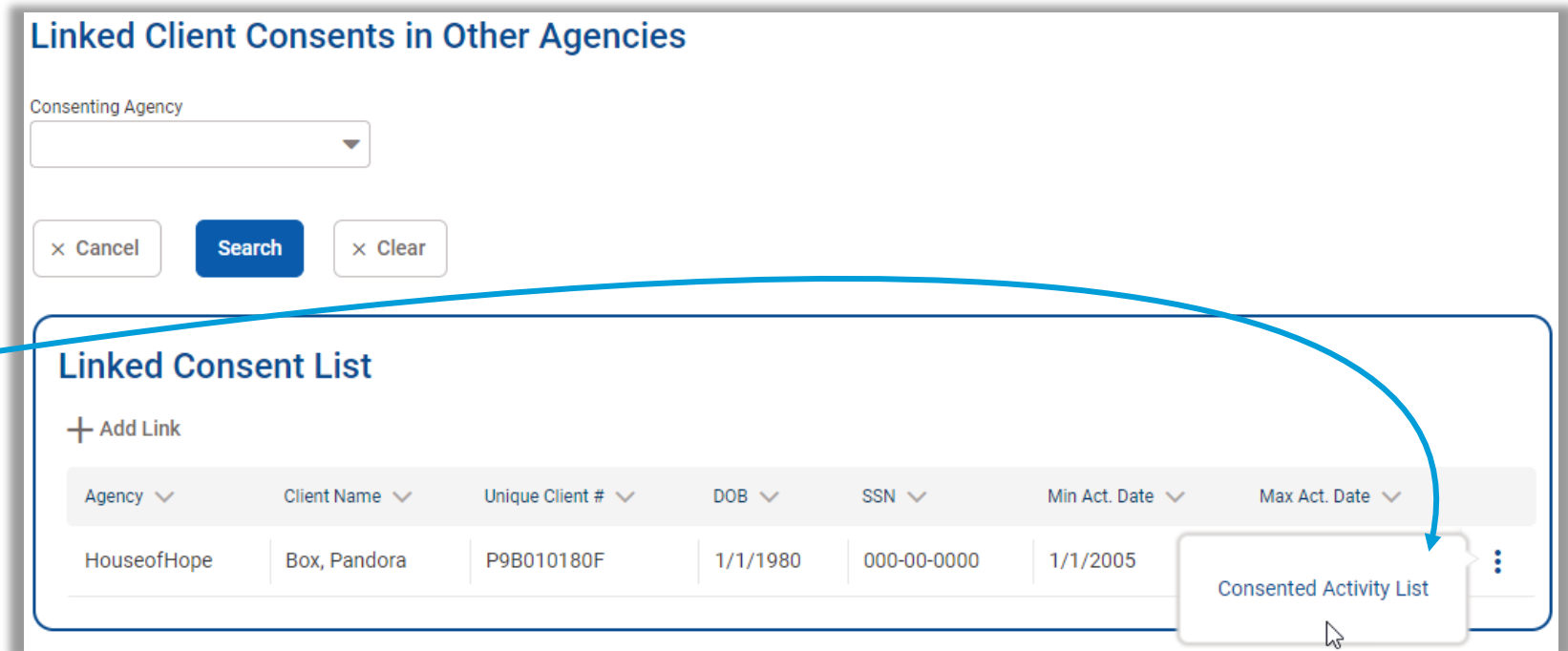
Once a referred client has had a new profile created in your agency or associated to an existing profile as the **Same Client**, the consented information for that client will be automatically linked to their profile at your agency. Users who have been assigned the UWITS role **Linked Consents** may view this information via the **Client List**.



The screenshot shows a client profile card for Pandora S. BOX. The card includes a profile picture (PB), name, date of birth (1/1/1995), gender (Female), and a unique client number (P8B010195F). A dropdown menu is open on the right side of the card, listing options: Profile, Activity List, Delete Record, and Linked Consents. A mouse cursor is hovering over the 'Linked Consents' option. Below the card is a section titled 'Clients with Consents from Outside Agencies' which currently displays no results.

Begin by navigating to the **Client List**. Search for the Client then hover over client and select **Linked Consents**.

Hover over the action button (⋮) then select **Consented Activity List** to view consented information.




The screenshot shows the 'Linked Client Consents in Other Agencies' page. It features a search filter for 'Consenting Agency' with a dropdown menu. Below the filter are 'Cancel', 'Search', and 'Clear' buttons. The main content area is titled 'Linked Consent List' and includes an 'Add Link' button. A table displays the following data:

Agency	Client Name	Unique Client #	DOB	SSN	Min Act. Date	Max Act. Date
HouseofHope	Box, Pandora	P9B010180F	1/1/1980	000-00-0000	1/1/2005	

A dropdown menu is open on the right side of the table, showing the 'Consented Activity List' option. A mouse cursor is hovering over this option.

Viewing Referrals Out

Referrals made from your agency to another agency (or entity) may be seen at the **Referral Out** screen for your agency. Click on an entry in the **Referral Status Codes** box and use the  button to choose a selection.

Alternatively, use the search criteria boxes, such as Unique Client Number or Referred Date. Click the **Search** button to search.

Referrals Out Search

Referral Status Codes

- Placed/Accepted
- Referral Created/Pending**
- Referral Terminated
- Refused Treatment
- Rejected by Program
- Wait List

Search Criteria

Unique Client Number

First Name


Last Name

Created Date


Referred Date

Search

Referrals from Administrative Unit

 Export

Currently, there are no results to display for Referrals from Administrative Unit .

Hover over the action button () then click on **Review** to see details for that referral.

Referrals from Administrative Unit

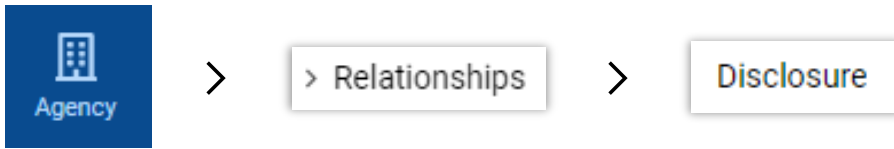
 Export

Name	Created Date	Referral Status	Referred To Agency	Referred To Facility	Non System Agency	Referred To Modality	Referral Comments	
Beazley, Pam	6/22/2022	Referral Created/Pending	HouseofHope	House of Hope (SLC)		Amb. Outpatient		
Romanoff, Natasha	5/18/2022	Referral Created/Pending	SLCo Outreach Unit	Assessment and Referral Unit		Amb. Intensive Outpatient	CW-A 5/18,	 Review
bauer, jack	5/4/2022	Referral Created/Pending	Criminal Justice Services	Treatment Program		Amb. Outpatient		

Referral Status shows the status of a referral. It can be changed by the agency to which the client was referred. For example, when an agency accepts the referral, it will show as **Placed/Accepted**.

Appendix: Agency Disclosure Domain

When an agency consistently requests the same information for a client, save the list of documents requested into an Agency Disclosure Domain record to make creating Consents to that agency faster and easier. An Agency Disclosure Domain record can be considered a template for creating new Consents.



First, navigate to the Agency Disclosure Domain List by clicking on Agency then Relationships then Disclosure.

The screenshot shows the "Agency Disclosure Domain List" interface. At the top left, there is a link "+ Add Agency Disclosure Domain Record". Below this is a table with columns "Consents Granted By" and "Consents Granted To". The table contains five rows, each with "Administrative Agency" in the first column and various agency names in the second column. To the right of each row is a vertical ellipsis menu. A callout box points to the "Add Agency Disclosure Domain Record" link, stating: "Click on the **Add Agency Disclosure Domain Record** link to add a new template." Another callout box points to the "Agency Name" dropdown menu, which is currently set to "Administrative Agency", stating: "The **Agency Name** dropdown box will default to your agency. Multiple agencies will only appear if you have access to or oversight of additional agencies. Select the agency for which you would like to setup an Agency Disclosure Domain." A third callout box points to the "Review" and "Delete" buttons in the vertical ellipsis menu of the first row, stating: "Existing Agency Disclosure Domain templates will be listed. Hover over the action button (⋮) to **Review** or **Delete** an existing template."

Click on the **Add Agency Disclosure Domain Record** link to add a new template.

The **Agency Name** dropdown box will default to your agency. Multiple agencies will only appear if you have access to or oversight of additional agencies. Select the agency for which you would like to setup an Agency Disclosure Domain.

Existing Agency Disclosure Domain templates will be listed. Hover over the action button (⋮) to **Review** or **Delete** an existing template.

Consents Granted By	Consents Granted To
Administrative Agency	OPTUM
Administrative Agency	FEI Testing - Provider Agency
Administrative Agency	FDCC
Administrative Agency	All Other Agencies

Agency Disclosure Domain

Disclosing Agency
Administrative Agency

Receiving Agency
FEI Testing - Provider Ag...

Receiving Entity(Non System Agency)
[Empty field]

Global Policy? (Available To All Agencies)
 Yes No

Always Verify Consent?
 Yes No

At the **Agency Disclosure Domain** screen, select the **Disclosing Agency**. The disclosing agency is the agency which has the information which will be shared. Unless you have access to or oversight of additional agencies, this will be your agency.

The **Receiving Agency** is the agency to which client information will be disclosed. Note: **Global Policy or Non-System** is listed as an option but is NOT used.

The **Always Verify Consent** field must be Yes.

Disclosure Domain Selection

Client Information To Be Consented

Expiration Type
[Empty dropdown]

*Expiration type is required for disclosure activities.

Consent Options
ASAM
ASAM Tx Plan
Behavioral Health Assessmer
Client Information (Profile)
Client Screening
Consent



Selected Options
Admission (DS, +20)
Discharge (UD, +90)

The **Disclosure Domain Selection** specifies the client information to be consented. See the next page 21 for more details.

Disclosure Domain Selection

The **Consent Options** box shows client information that can be shared. As these options are selected, an expiration date must be associated with each option. An **Expiration Type** must be selected to determine when each **Client Information Option** expires.

Consent Options

The list of available options includes the following:

- | | |
|------------------------------|----------------------------------|
| Admission | Intake Transaction |
| ASAM | Medication Summary |
| ASAM Tx Plan | Mental Health Assessment |
| Behavioral Health Assessment | Mental Status Report |
| Client Information (Profile) | Miscellaneous Note Detail |
| Client Screening | Multi-Dimensional Assessment |
| Consent | Outcome Measures – Client Status |
| CONTINUUM | SASSI Scores |
| DENS ASI Assessment | TAP Assessment |
| Diagnosis List | Treatment Plan |
| Discharge | Treatment review |
| Drug Test Results | Vital Signs |
| Encounter Detail | Wraparound Plan of Care |
| GPRA Assessment | Wraparound Transition Plan |
| GPRA Interview | |

Please note: Items listed in gray are not currently active in UWITS.

Click on the **Consent Options** to select which specific information to include in the **Agency Disclosure Domain** template. You may hold the Ctrl key to select multiple options at once.

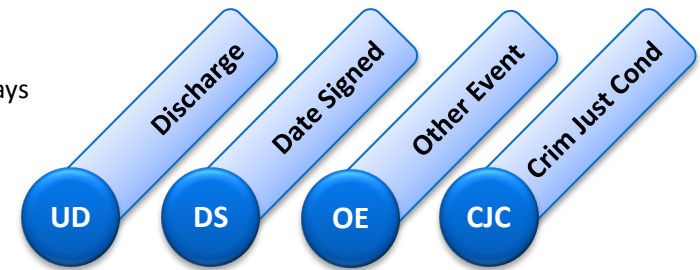
Then select the appropriate **Expiration Type** from the drop down box for the selected Consent Options. Click on the **>** button to move the selections to the **Selected Options** box.

Expiration Types

The most common **Expiration Types** are **Discharge** and **Date Signed**.

When **Discharge** is selected, the consent will expire based on the date of discharge plus the number of days entered. To select expiration on the day of discharge itself, enter zero for **+Days**. **UD** stands for upon discharge.

When **Date Signed** is selected, the consent will expire based on the Consent Date plus the number of days entered. **DS** stands for date signed.



Alternative Expiration Types

Other Event – The consent will expire based on the specific event. The user must specify the date of expiration. The user must give details of the specific event in the **Description** box. **OE** stands for other event.

Criminal Justice Conditions – The consent expires based on a pre-determined expiration date associated with the Criminal Justice System. The user must enter in the **Description** box. **CJC** stands for Criminal Justice Conditions.

Appendix: Frequently Asked Questions

When I try to look at Consented Activities, all I get is a message that says “Return to Consented Activity List”. Why can’t I see the details?

Allow pop-ups for the UWITS website in your browser.

Consented Activity View

[Return to Consented Activity List](#)

^ Hide Context Information

Note: Consented information may not be redisclosed.

Appendix: Related UWITS User Roles and Descriptions

Consent (Delete)

Allows the user to delete unsigned Client Consents subject to the business rules in place.

Consent (Full Access)

Full access to all options under Client List/Activity List/Consent.

Consent (Read-Only)

Read-Only access to all options under Client List/Activity List/Consent.

Referrals (Full Access)

Full access to all options under Client List/Activity list/Referrals.

Referrals (Read-Only)

Read-Only access to all options under Client List/Activity list/Referrals.

View Consented Clients

The role allows the user to view clients with Consents on the Client List.