


SENDING AN ELECTRONIC ASAM ASSESSMENT TO ANOTHER PROVIDER IN ASAIS

1. Locate the client's record either through Quick Search or in the "Clients" chapter
2. Click on the "Notes" tab in the client record

Last Name	Testcase	Status	Active
First Name	Eric	Medicaid ID	N/A
ASAIS ID	313145	SSN	345-53-4354
Middle Name			

Demographics Episode Enrollments Contacts Claims Submitted **Notes** 

Payers Profiles and Discharge Summaries Eligibility Diagnosis Medications

Demographics


Date of Birth	10/1/1978	Gender	Female
Date of Death		Alias	

Contact Information

County	Madison	State	Alabama
Street	444 Main Street	Zip Code	34234
Street 2		Home Phone Number	
City	Huntsville		

3. Click on the "Add Notes" Menu Option

Eric Testcase

File - Add New Client - Add Notes - Print 

Tools

Reports - Consumer Notes for Selected Consumer

Ticklers

Last Name	Testcase	Status	Active
First Name	Eric	Medicaid ID	N/A
ASAIS ID	313145	SSN	345-53-4354
Middle Name			

Demographics Episode Enrollments Contacts Claims Submitted **Notes**

Payers Profiles and Discharge Summaries Eligibility Diagnosis Medications

Filter

Note Date

0 record(s) returned

4. A pop-up window will open that then allows you to create a note, set the "Fund Code" to "SA", **DO NOT** select a "Program", set the "Note Type" to "Attachment", enter a "Description" of "Assessment" with the date of the assessment and fill out the "Phone Number" field with the

number of the assessor.

AS AIS id [redacted]
Note By * Vilamaa, Kris
Note Date * 8/8/2012
Fund Code SA
Program [redacted]
Note Type * Attachment
Description Assessment 8/2/2012
Note [redacted]

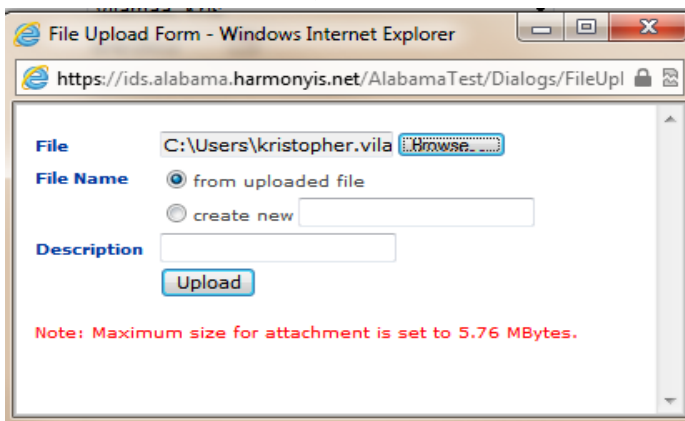
Status * Pending
Date Completed [redacted]
Confidential
Phone Number (334)242-2222

Attachments
Add Attachment
Document Description Action
There are no attachments to display

Note Recipients
Add Note Recipient: [redacted] ... Clear

Name	Date Sent	Date Read	Status	Date Signed
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5. Click on "Add Attachment"
6. You will receive a second pop-up that asks you to locate the file you want to upload. Locate the assessment for the client (in this case "Testcase Assessment.docx")



- Click "Upload" and the file will appear as a "Document" on the first pop up window

Attachments

Add Attachment

Document	Description	Action
Testcase Assessment.docx		Remove

Note Recipients

Add Note Recipient: ... Clear

Name	Date Sent	Date Read	Status	Date Signed
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- Next to "Add Note Recipient" click on the ellipsis

Attachments

Add Attachment

Document	Description	Action
Testcase Assessment.docx		Remove

Note Recipients

Add Note Recipient: ... Clear

Name	Date Sent	Date Read	Status	Date Signed
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- Every provider has a worker in the system with the last name of assessment, search for the last name "Assessment"

DialogWorkerSearch -- Webpage Dialog

https://ids.alabama.harmonyis.net/AlabamaTest/Dialogs

Search by Last Name:

Assessment

- Find the provider who you are trying to send the assessment to (In this case, "ADATC Assessment") and click on them

Search by Last Name:

Assessment

MEMBERID	Worker
201	Assessment, ADATC
1367	Assessment, AIDS Alabama
946	Assessment, Ala Family Resource Ctr, Inc.
202	Assessment, Aletheia House
227	Assessment, Altapointe
824	Assessment, Anniston Fellowship House
825	Assessment, Baldwin MHC
1314	Assessment, BHM Metro
826	Assessment, Birmingham Fellowship House
839	Assessment, C.A.P.

11. They will show on the list view

Attachments		
Add Attachment		
Document	Description	Action
Testcase Assessment.docx		Remove

Note Recipients					
Add Note Recipient: <input type="text"/> ... <input type="button" value="Clear"/>					
Name	Date Sent	Date Read	Status	Date Signed	
Assessment, ADATC	8/8/2012		Unread		Remove

12. Scroll back to the top and click "Save and Close Notes"

Eric Testcase

File - Spell Check - Save Notes - Save and Close Notes - - Print - Close Notes

Notes Details

AS AIS id

Note By *

Note Date *

Fund Code

Program

Note Type *

Description

Note

13. You will get a "Save was Successful" message

14. The Note will appear as a new record on the "Notes" List View and the receiving provider will get a tickler to let them know the assessment is there.

Eric Testcase

File - Add New Client - Add Notes - Print

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Reports - Consumer Notes for Selected Consumer

Ticklers

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AS AIS ID	313145	SSN	345-53-4354
Middle Name			

Demographics | Episode | Enrollments | Contacts | Claims Submitted | **Notes**

Payers | Profiles and Discharge Summaries | Eligibility | Diagnosis | Medications

Filter

Note Date

1 Notes record(s) returned - now viewing 1 through 1

Note Date	Note By	Note Type	Description	Status	Date Completed	Attachment
08/08/2012	Vilamaa, Kris	Attachment	Assessment 8/2/2012	Pending		Yes

Retrieve 50 Records at a time