



## Client File Development

### Data Entry

The following are I-SMART modules commonly used to construct a data entry client file for clients who are being admitted to treatment. This shows a client file with both assessment and admission steps.

- If the user is not documenting an assessment prior to admission, skip steps 5-8.
  - Always perform a search for clients prior to adding a new client to insure that person does not already have a file in the system.
  - If the client is already in the system and has a closed case, clicking on the client's Activity List link will take the user to the Episode List screen. At that screen, simply begin with step 3 below.
  - If documenting an assessment/placement screening with no admission, do steps 1-7. Then skip to Step 13 to **Save and Close the Case** at the Intake screen.
1. Client Search screen: Add New Client
  2. Client Profile
  3. Episode List: Start New Episode
  4. Intake
  5. Placement Screening (If completed, this will populate the Admission module should you want to admit the client to treatment at some point.)
  6. Program Enrollment (Assessment): Put in both start and end dates.
  7. Encounter: Placement Screening
  8. Admission
  9. Program Enrollment (EOP, IOP, etc.)
  10. Admitted Client Encounter Note(s): User can enter one encounter for each client session, or enter a monthly date range with several sessions documented in each encounter.
  11. Program Enrollment: If client changes programs and/or level of care, end client enrollment from program in that level of care and enroll him/her in the new program.
  12. Discharge: Client's program enrollments must all be ended in order to discharge.
  13. Close Case: The system will ask the user for a close case confirmation at the time the Discharge module is completed.
    - If the user wants to close the case manually, the **Save and Close the Case** link at the Intake Screen will close the case.
    - Cases can be closed at any time as long as the user has entered completed encounters for all face-to-face client sessions and has ended all program enrollments.