SANTA BARBARA COUNTY
DEPARTMENT OF
Behavioral Wellness
A System of Care and Recovery

M E M O R A N D U M

Date: 10/5/2017

To: Clinical Staff

From: Quality Care Management

Subject: Pre-Consumer Process

The Pre-Consumer number is used for documenting services provided to Pre-Consumers: community members that are not currently in Sharecare or Clincian's Gateway, also called new clients and initial contacts.

Procedure:

1. Always check to see if the client was previously opened in Sharecare or Clincian's Gateway.
2. If there is no record of client in Sharecare or Clinician's Gateway, go to the Home screen on Clinician's Gateway/ Menu/ Client Registration.
3. Input client's information /Search.
4. Select Add Client. This creates a Pre-Consumer number.

You can now begin documenting under client's Pre-Consumer number.

It is appropriate to document under the Pre-Consumer number until client is open to the county. At that point, documentation should be under the Client number.

In addition to use for Pre-Consumers, remember that the Access Template will be used for all initial routine, urgent, and crisis contacts with Access, walk-ins to clinics, and outreach programs. Typically, Access QCM screeners are the ones who will use the screening tab due to the services being conducted by phone. Other staff will primarily use only the Contact sheet. After staff complete the Contact sheet, they will finalize the Access template, and then move on to complete one of the other assessment templates or the crisis template.

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