

Timeliness Entry Quick Reference Guide

Use this checklist to quickly complete Timeliness Entry in SmartCare. Refer to the full training handout for details.

Outpatient, OTP & Withdrawal Management

- Open SmartCare → Search 'Timeliness' → Select form
- Fill 'Initial Request' → 'First Appointment Offered'
- Withdrawal Mgmt ONLY → Check 'Urgent'
- First visit kept → Enter intake/visit date as 'First Appt Rendered'
- If appropriate → Schedule follow-up (enter as 'Follow Up Offered')
- Second visit → Complete 'Follow Up' section & sign

Residential (Marin Providers)

- Open SmartCare → Search 'Timeliness' → Select form
- Fill 'Initial Request' → 'First Appointment Offered' (ASAM)
- Do NOT check 'Urgent'
- First visit kept → Use ASAM date as 'First Appt Rendered'
- Mark 'No' for out-of-network provider
- Continue with follow-up

Residential (Out-of-County Providers)

- Open SmartCare → Search 'Timeliness' → Select form
- Date of First Contact = referral form date (or ASAM date for ADC)
- First Appointment Offered = ASAM date
- Do NOT check 'Urgent'
- First visit kept → Same steps as Marin Residential

All Programs

- First appointment NOT kept → Update Initial Request → Complete Closure → Sign
- Follow-up NOT kept → Complete Closure → Sign

Residential Follow-Up

- Client enrolled → Complete 'Follow Up' section
- Use enrollment date as 'Follow Up Rendered Date'
- Sign form