

## Timeliness Data Entry and Checking Compliance

10/6/25

A SmartCare timeliness document is required for clients entering **DMC-ODS programs**, regardless of insurance, to measure the time it takes to get into care. The data is used to assess Marin’s adherence to timely access standards.

### CalMHSA instructions

- [Outpatient](#) (Note: There isn’t a Residential option - use the Outpatient form)
- [NTP/OTP](#)

### Entering Timeliness

<b>Who:</b>	<b>When:</b>	<b>What:</b>
Outpatient, OTP & withdrawal management	Client contacts your agency	<ol style="list-style-type: none"> <li>1. Select client in SmartCare: Search “Timeliness” and pick correct form</li> <li>2. Fill out all the fields under “Initial request” up through “First appointment offered” (you may call this the “intake” at your organization).</li> <li>3. <b>Withdrawal management: check “Urgent”</b></li> </ol>
Residential ( <b>Marin based</b> providers)	Client contacts your agency, Access, or has BQUIP	<ol style="list-style-type: none"> <li>1. Select client in SmartCare: Search “Timeliness” and pick correct form</li> <li>2. Fill out all the fields under “Initial request” up through “First appointment offered”. First appointment offered will be for ASAM.</li> <li>3. <b>Do not check “Urgent”</b></li> </ol>
Residential ( <b>Out of county</b> providers)	Client contacts your agency, Access, or has BQUIP	<ol style="list-style-type: none"> <li>1. Select client in SmartCare: Search “Timeliness” and pick correct form</li> <li>2. Fill out all the fields under “Initial request” up through “First appointment offered”                             <ol style="list-style-type: none"> <li>a. Date of first contact is the date on the Out Of County referral form, <b>except for ADC referrals</b> where date of first contact is the date of the ASAM</li> <li>b. Date of First appointment offered is ASAM date</li> </ol> </li> <li>3. <b>Do not check “Urgent”</b></li> </ol>
All	First appointment NOT kept	<ol style="list-style-type: none"> <li>4. Go back into form, complete “Initial Request” section</li> <li>5. Complete the Closure section</li> <li>6. Sign the form – you’re done!</li> </ol>
Outpatient, OTP & withdrawal management	Client attends first visit	<ol style="list-style-type: none"> <li>7. Go back into form, complete “Initial Request” section</li> <li>8. Use date of intake/first visit as first appointment rendered date.</li> <li>9. If they are <b>not appropriate for treatment or don’t want to continue</b>, indicate “Follow up is not required” and sign the form.</li> <li>10. If they are appropriate for treatment and want to continue, schedule or instruct them when to come back, that is “follow up offered date”</li> </ol>
Residential (all)	Client assessed (i.e. kept first visit)	<ol style="list-style-type: none"> <li>7. Go back into form, complete “Initial Request” section</li> <li>8. Use date of ASAM as first appointment rendered date.</li> </ol>

		<p>9. <b>Say no to this question:</b> <i>“Indicate whether or not the client was referred to an out-of-network provider”</i> (even if client is at out of county residential)</p> <p>10. If they are <b>not appropriate for treatment or don’t want to continue</b>, indicate “Follow up is not required” and sign the form.</p> <p>11. If they are appropriate for treatment and want to continue, schedule or instruct them when to come back, that is “follow up offered date”</p>
All	Follow up NOT kept	<p>12. Go back into form</p> <p>13. Complete the Closure section</p> <p>14. Sign the form – you’re done!</p>
Outpatient, OTP & withdrawal management	Client has 2 <sup>nd</sup> visit	<p>12. Go back into the form and complete “Follow up” section (2<sup>nd</sup> visit overall)</p> <p>13. Sign the form.</p>
Residential (all)	Client enrolled	<p>12. Go back into the form and complete “Follow up” section</p> <p>13. Use enrollment date as follow up appointment rendered date</p> <p>14. Sign the form.</p>

**Notes:**

- Sometimes a client does not complete the admission process. If a client makes a request for services but doesn’t continue (doesn’t attend intake or doesn’t come to second visit within 15 days), then:
  - Complete the Closure section and sign the form.
- The dates should make logical sense: the date the first visit was kept can’t be BEFORE the intake (though they can be on the same day), and the date the follow-up was kept can’t be BEFORE the first visit offered/kept dates.

**Monitoring timeliness compliance**

- Monthly, run the report **SUD Clients Missing Data**
- This report lists any client enrolled in a DMC-ODS program 14+ days ago with missing timeliness information
- For any clients missing a timeliness form, create the timeliness form
- For any timeliness forms not signed, complete and sign the timeliness form

## 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

## Timeliness Entry Flow Chart

This document contains the unified Timeliness Entry process flow chart, covering Outpatient, OTP & Withdrawal Management, Residential (Marin Providers), and Residential (Out-of-County Providers).

