# Connect Nevada: Strengthening Youth, Empowering Families

# Outcomes and Assessments System – Adding a Youth to Your Caseload

Overview

Prior to working with youth within Magellan's outcomes and assessments system (accessed via Availity Essentials), you must locate the youth and add them to your caseload. This includes getting consent to view their information within the outcomes and assessments system before you will have access to their profile. This step-by-step guide will walk through how to conduct an advanced search to locate the youth, how to send a consent form to the youth/guardian to complete, and what access will look like once consent is received.

Locate the youth via an advanced search

1. From the Dashboard, type the youth's name into the **Search** bar at the top of the page.
2. Click the **magnifying glass** icon *or* hit **Enter** on your keyboard.
3. The search results will display **No data found** as the youth is not yet assigned to your caseload.
4. Click the **Advanced search** button.
5. Enter the search criteria for the youth.
   NOTE: Best practice is to search by first name, last name, and date of birth.
6. Click **Search**.
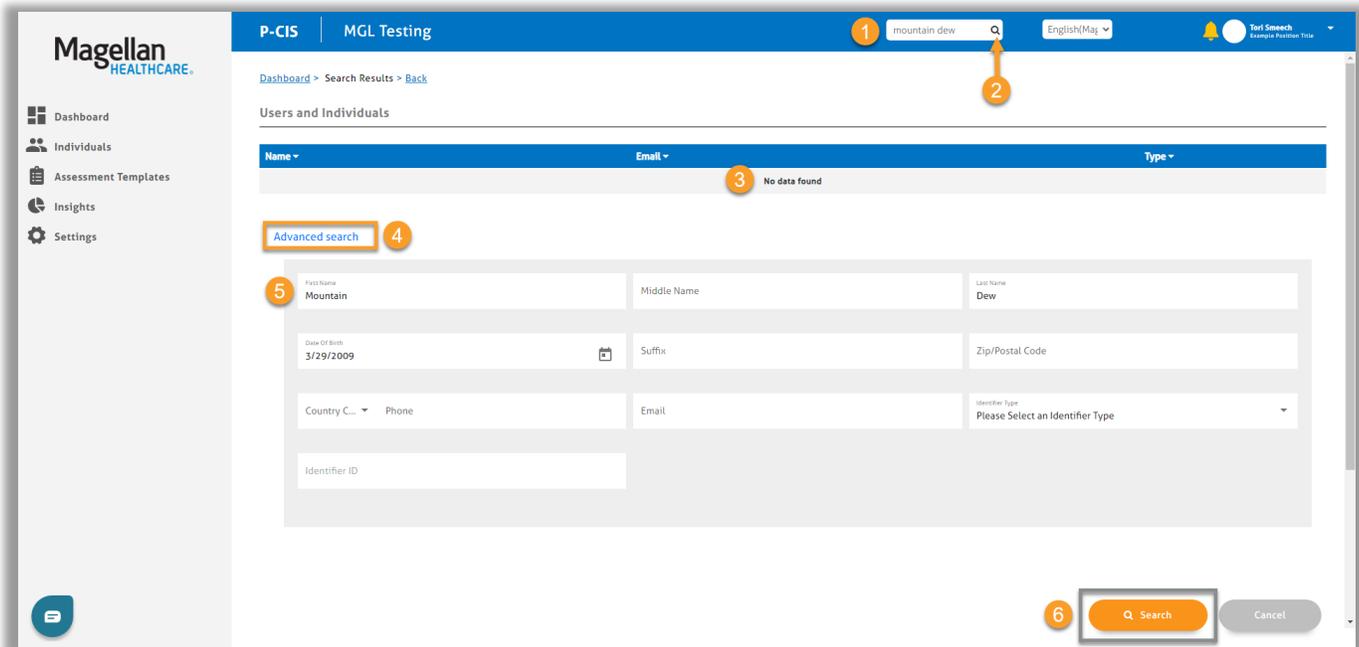
7. Click the hyperlinked name to navigate to the youth's profile.
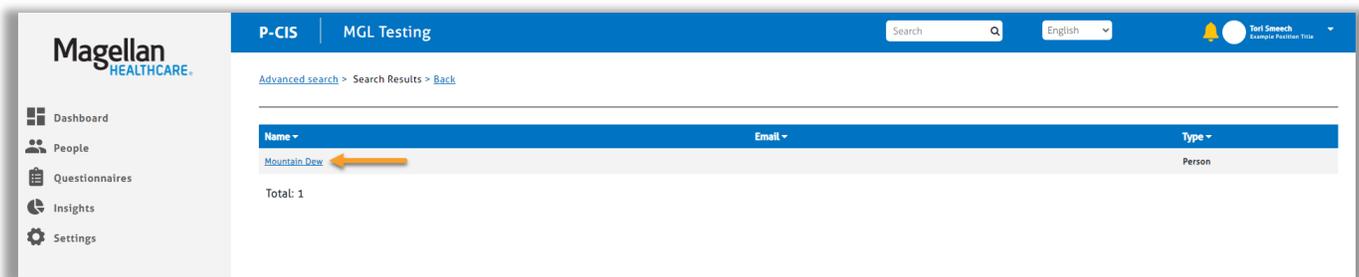
8. On the youth's profile, verify that there is a phone number and/or email address within the **Contact Info** section.
   NOTE: To send the consent form to the youth/guardian, there must be an email address and/or a phone number on file. This is how the consent form will be sent to them if the youth/guardian is not physically present.
9. Does the youth have a phone number and/or an email address on file?
   A. If yes, then proceed to the *Adding consent* section.
   B. If no, then proceed to *Step 10*.
10. Click **Edit**.

11. Enter a phone number into the **Phone 1** field and/or enter an email address into the **Email** field.
    NOTE: When editing the youth's profile, it is important to not edit anything other than phone number and/or email address. All other fields must remain untouched.
12. If a phone number was entered, check the box for **Texting Permitted**.
13. If an email address was entered, check the box for **Email Permitted**.
14. Click **Save**.

Adding consent – youth/guardian is *not* present

The following steps apply if the youth/guardian is not present to sign the consent form with you. If the youth/guardian is present, you can refer to the Adding an Assessment Step-by-Step Guide for further steps.

1. From the youth's profile, click the **Assessment Templates** tab.
2. Is the **Clone of Nevada Consent Form** assessment listed in the youth's **Assessment Templates** tab?
    A. If yes, complete the following steps:
        1) Click the radio button to open the assessment.
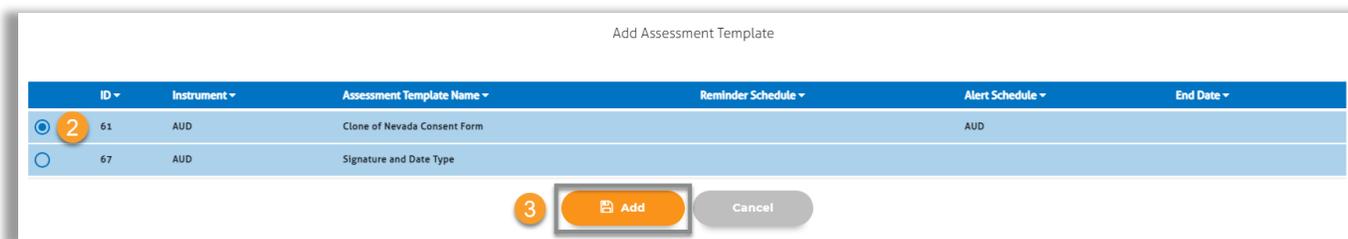   2) Click the **ADD** button.

        3) Proceed to *Step 3*.
    B. If no, complete the following steps:
        1) Click the **(+) Add Assessment Template** button.

        2) Click the radio button for the **Clone of Nevada Consent Form**.
        3) Click **Add**.
            NOTE: The Add button will not appear until you select an assessment template.

Add Assessment Template

	ID ▾	Instrument ▾	Assessment Template Name ▾	Reminder Schedule ▾	Alert Schedule ▾	End Date ▾
● ②	61	AUD	Clone of Nevada Consent Form		AUD	
○	67	AUD	Signature and Date Type			

③ 🖫 Add   Cancel

4) Now that the assessment has been added to the youth's profile, click the radio button to open the assessment.

5) Click the **ADD** button.
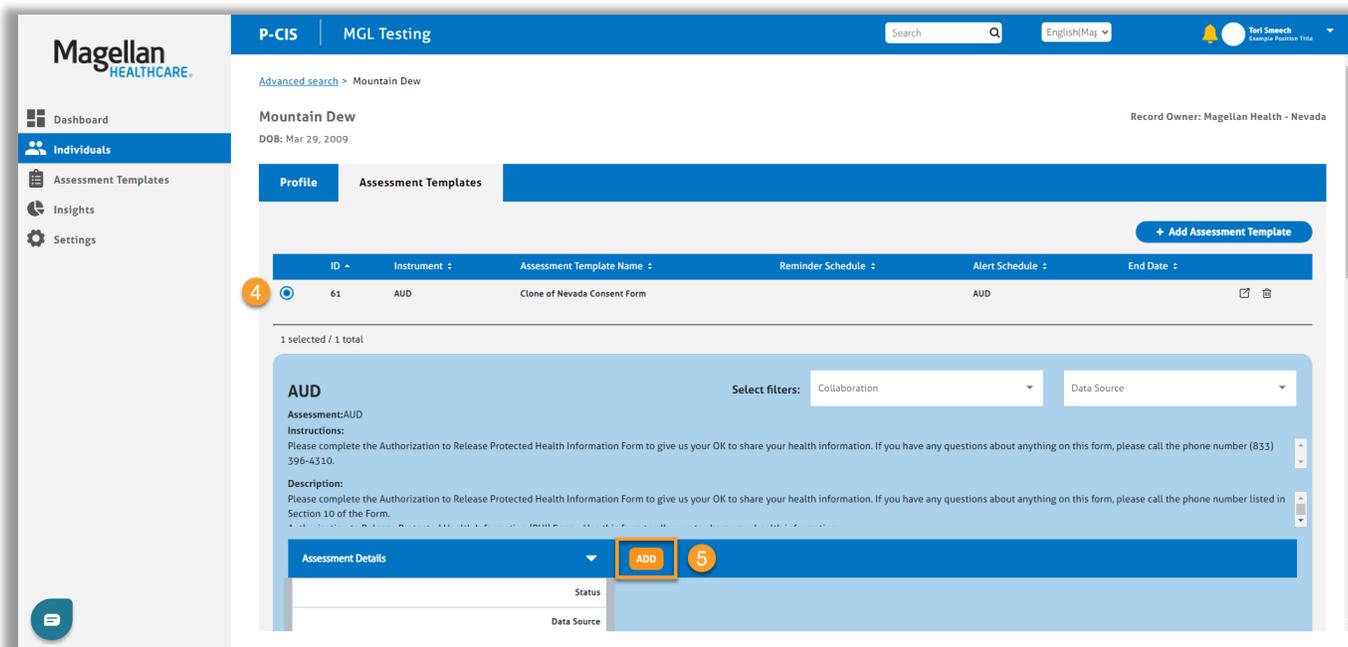
6) Proceed to *Step 3*.

3. Complete the fields of the Add New Assessment screen.
   A. **Date** – Auto populates the **current date** and can be changed if needed.
   B. **Data Source** – Select the appropriate option.
   C. **Reason** – Select the appropriate option.
   D. **Notes** – Optional and can be used to provide additional information as needed.

4. Click the **Invite to Complete** button. This will send a link to the natural support (support person/family member/guardian) person's email or phone number indicated in the youth's profile.

Magellan
HEALTHCARE®
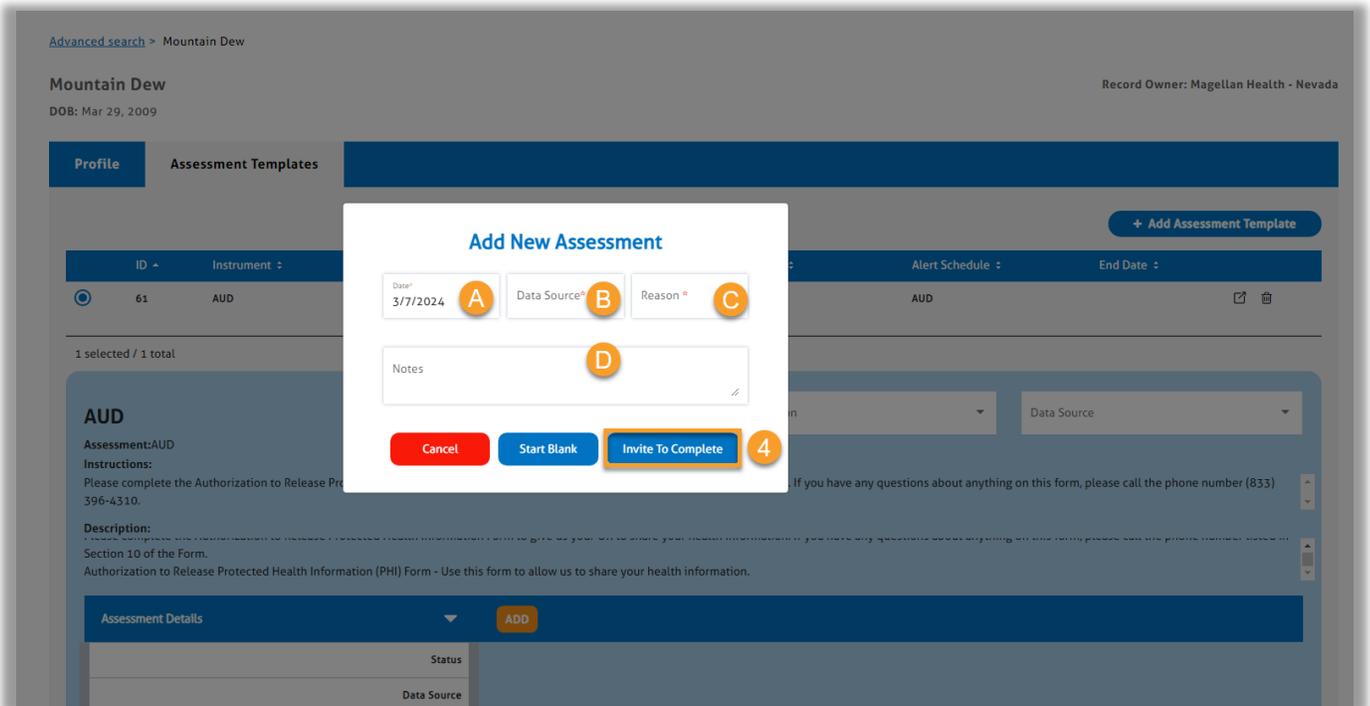
5. A **Thank You!** window will appear indicating that the natural support has been sent a link to complete the consent assessment.
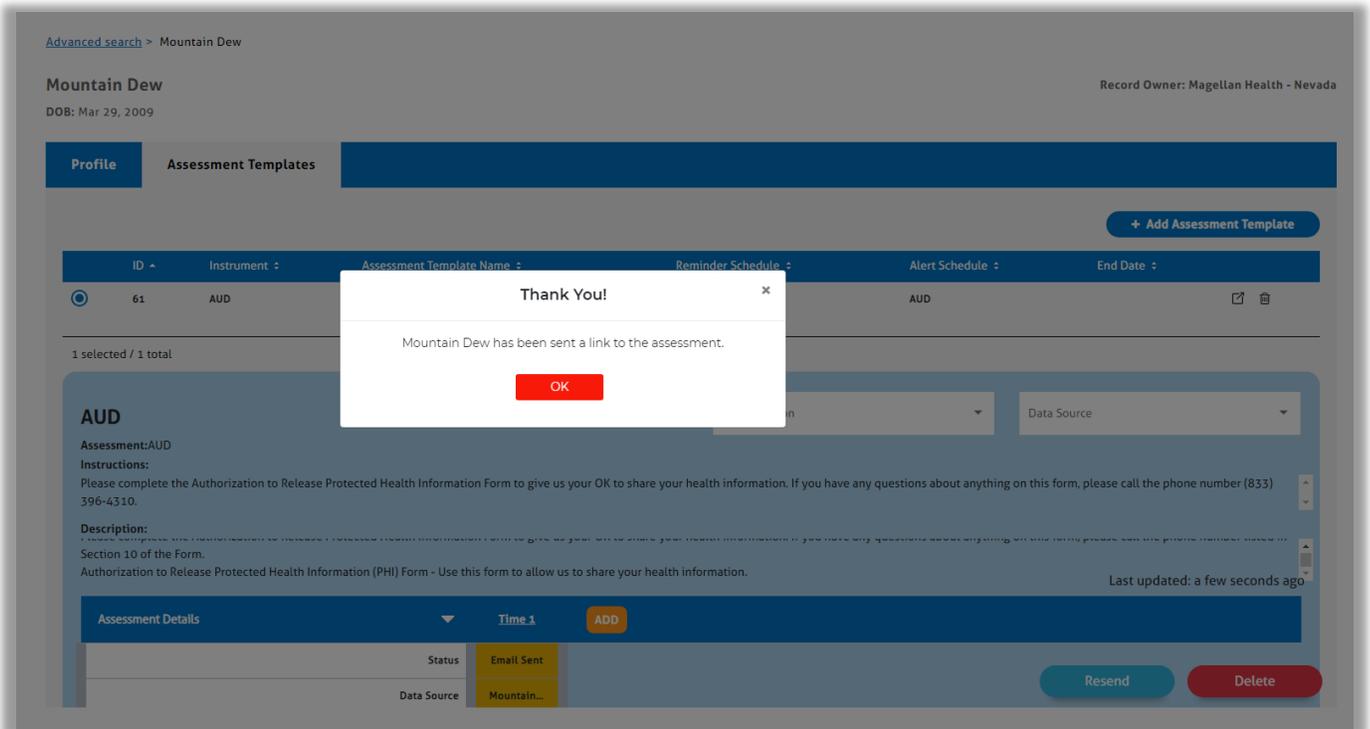
6. Once the Consent Form has been completed and returned, you will have immediate access to the youth's profile, as well as the Child and Adolescent Needs and Strengths (CANS) and Independent Behavioral Health Assessment (IBHA) that you will be completing with them.