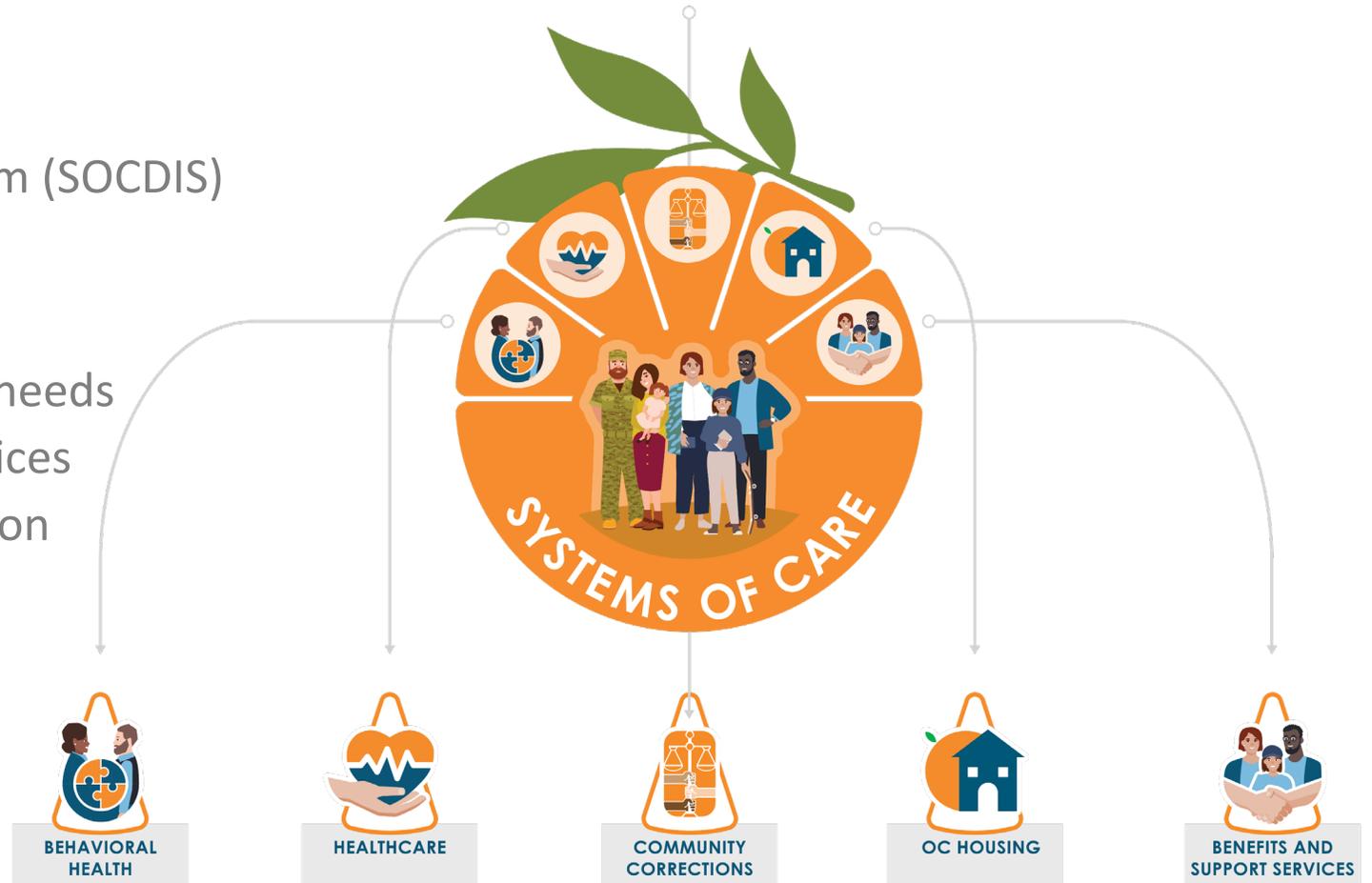


System of Care Data Integration System

SOCDIS

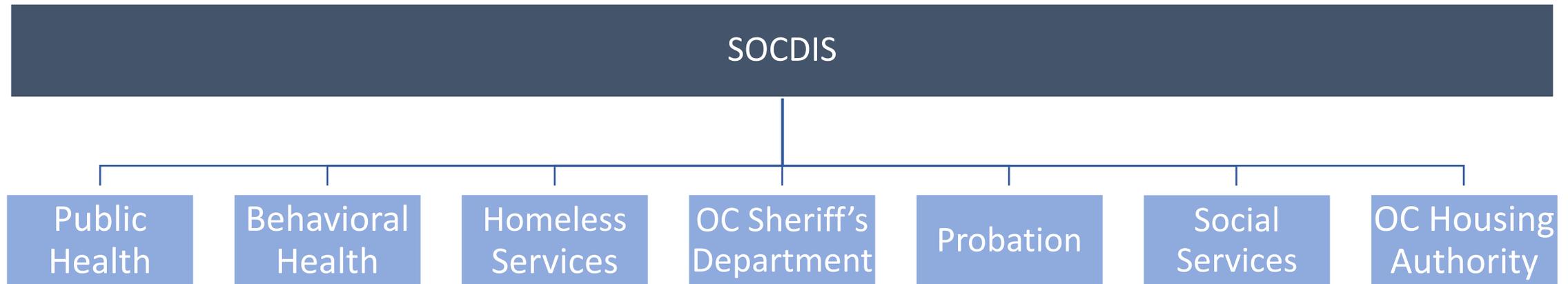
Care Plus Program

- The Care Plus Program offers enhanced care coordination for those who are the most vulnerable across the County's System of Care.
- The program consists of two components:
 1. System of Care Data Integration System (SOCDIS)
 2. Multidisciplinary Team (MDT)
- The program has two objectives:
 1. Expediting the identification of client needs
 2. Providing subsequent linkages to services with greater collaboration, maximization of resources and fewer delays in care coordination



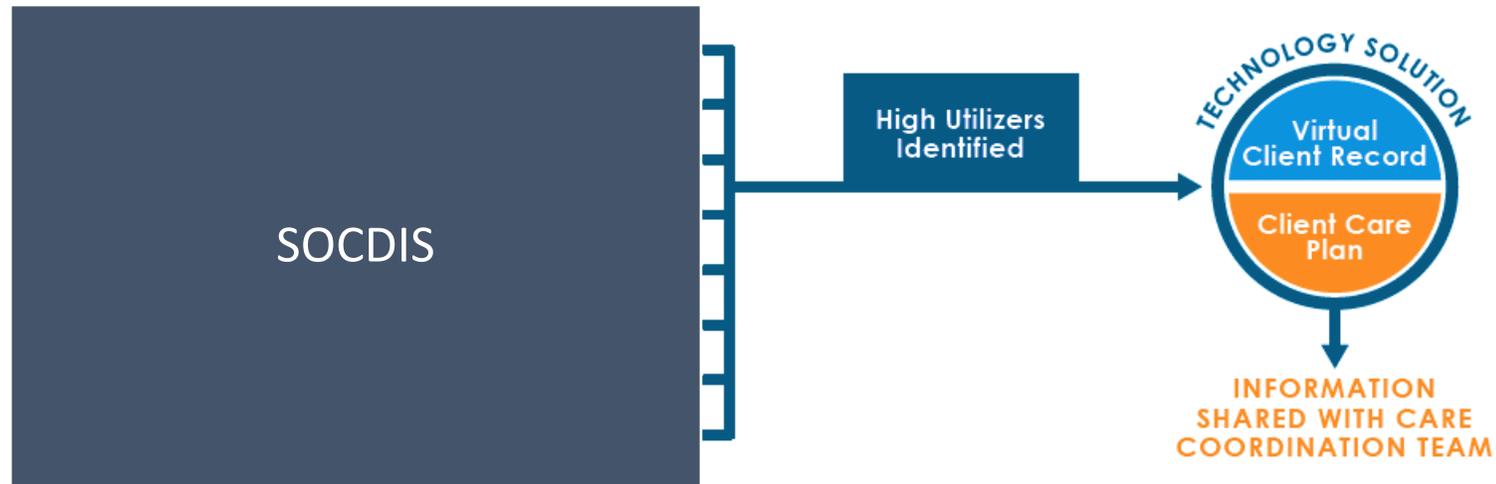
SOCDIS

- The System of Care Data Integration System (SOCDIS) integrates numerous County databases to create a consolidated virtual client record. This technology solution facilitates data sharing between County departments and community-based organizations and provides a platform to create client care plans and track progress.



Multi-Disciplinary Team

- SOCDIS creates one Virtual Client Record with a client's demographics, program history and service utilization. Interdepartmental data and information sharing is then facilitated by a Multi-Disciplinary Team (MDT) which meets twice a month to coordinate care for high utilizers accessing County services/programs. High utilizers are defined as those found in four or more databases across source systems.



Care Team

- Jordan Silveira – Volunteers of America
- Jennifer Dinicola – Health Care Agency
- Miguel Anguiano – Social Services Agency
- Brenda Troung – Health Care Agency
- Brian Shumate – OC Probation Department

Client Dashboard

Power Apps | SOCDIS New look + 🔔 ⚙️ ?

← Save Save & Close + New Deactivate Client Connect Delete Refresh Check Access Process Flow Share

Client: David Smith - Saved Kuldeep Joshi Service Coordinator ICM001058 ICM Key

Summary Contact Info Addresses Care Plan Care Team Notes Related

Client Profile - David Smith



Age: 39
Birth Date: 10/11/1984
Gender: Male

David@test.mail

[View Virtual Client Record](#)

Client Authorization:

Client has given authorization
Start Date: 1/4/2024
Expiry Date: 1/3/2025

[Revoke/Modify Authorization](#)

Programs

<input type="checkbox"/>	Status Re...	Name	Start ...	Program T...
<input type="checkbox"/>	Enroll...	Homeless Cohort - ICC	2/5/2024	
<input type="checkbox"/>	Endin...	Homeless Cohort - VCC	1/3/2024	

Rows: 2

Recent Modified Goals

<input type="checkbox"/>	I	Program Typ...	Name	Care Go...	Op
<input type="checkbox"/>	.	ICC - Homel...	Gathering required docum...	Open	

Care Team Members

- Brenda Truong Service Chief II
- Jennifer Dinicola Program Manager/Administrative Manager II
- # Nicolalde, Jennifer OC Public Defender Director
- # jsilveira@voala.org
- Brian Shumate DPO II

1 - 13 of 13 Page 1

Assessments



Virtual Client Record (VCR)

Power Apps | SOCDIS | Search | New look | Share | ICM001058 ICM Key

VCR

Virtual Client Record

Refresh

10/11/1984 | Smith, David | Registered In ICM: ICM001058

- Client Demographics
- Contact Information
- Program Overview
- Extended Demographics
- Physical Health
- Behavioral Health
- Correctional Health Services
- County Jail
- Community Corrections
- Street Outreach
- Rental Assistance
- Shelter and Housing Programs

Start Date: 1/4/2024



VCR – Client Demographics

ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307

Power Apps | SOCDIS | Search | New look | Share | Refresh

Virtual Client Record

10/11/1984 | Smith, David | Registered In ICM: ICM001058

Client Demographics

First Name	Middle Name	Last Name
David		Smith
Alias	Date of Birth	Last 4 SSN
39	10/11/1984	5283
Marital Status	Gender	Gender Identity
Married	Male	Male
Race	Ethnicity	Veteran
White	Not Hispanic or Latino	No
Preferred Language	Other Language	English Ability
English	Spanish	Fluent Speaking
High School Grad	Enrolled In School	School Name
Yes	No	
Place Of Birth	Country Of Birth	Birth Last Name

Start Date: 1/4/2024
Expiry Date: 1/3/2025

ICM001058
ICM Key

Administrative Manager II



VCR – Program Overview

← → ↻ ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307 ☆ 👤 ⋮

Power Apps | SOCDIS | Search | New look | 🔔 ⚙️ ? 👤

VCR

Virtual Client Record

10/11/1984 | Smith, David | Registered In ICM: ICM001058

Refresh

Client Demographics

Contact Information

Program Overview

Program Name	Start Date	End Date	Status	Program Category	Agency
Homeless Cohort - ICC	02/05/2024		Enrolled	Referrals	
CalWORKs	02/15/2024	02/15/2025	Active	Benefits	Social Services Agency
Medi-Cal	02/15/2024	02/15/2025	Active	Benefits	Social Services Agency
CalFresh	02/15/2024	02/15/2025	Active	Benefits	Social Services Agency
OCSJ County Jail	04/13/2024	05/12/2024	Released	County Jail	OC Sheriffs Departm...

Rows: 8

Extended Demographics

Physical Health

ICM001058 ICM Key

Administrative Manager II

Start Date: 1/4/2024



HCA Outreach & Engagement Case Note

← → ↻ ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307 ☆ 👤 ⋮

Power Apps | SOCDIS New look + 🔔 ⚙️ ? 👤

☰ Home Recent Pinned Care Management Case Worker Dashbo... Case Worker Dashbo... Search Clients Clients Appointments Alerts

← | 📄 | 📁 | 💾 Save | 🗑️ Save & Close | + New | 🚫 Deactivate Client | 🔗 Connect | ⌵ | 🗑️ Delete | 🔄 Refresh | 🔍 Check Access | ⋮ | [Share](#) ⌵

 **Client: David Smith** - Saved
Contact

Kuldeep Joshi Service Coordinator | **ICM001058** ICM Key ⌵

Summary Contact Info Addresses Care Plan Care Team **Notes** Related ⌵

 **Client Contact from Jennifer Dinicola** 👤 ✓ 📄 🗨️ 🗑️
Agreed to Participate
On 1/4/2024 Client was found in Anaheim while doing canvassing outreach. He was referred to Bridges at Kraemer Place. He agreed to participate in the Care Plus Program, he signed the authorization and was referred to regional care coordination – VOALA.

10

S SOCDIS ⌵



Client Authorization

ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307

Power Apps | SOCDIS

Search

New look

Home, Recent, Pinned, Care Management, Case Worker Dashbo..., Search Clients, Clients, Appointments, Alerts

Client: David Smith - Saved
Contact

Kuldeep Joshi, Service Coordinator | ICM001058, ICM Key

Summary, Contact Info, Addresses, Care Plan, Care Team, Notes, Related

Client Profile - David Smith

Age: 39
Birth Date: 10/11/1984
Gender: Male

David@test.mail

View Virtual Client Record

Client Authorization:
Client has given authorization
Start Date: 1/4/2024
Expiry Date: 1/3/2025

Revoke/Modify Authorization

Programs

Status Re...	Name	Start ...	Pro
<input type="checkbox"/>	Enroll...	Homeless Cohort - ICC	2/5/2024
<input type="checkbox"/>	Endin...	Homeless Cohort - VCC	1/3/2024

Rows: 2

Recent Modified Goals

I	Program Typ...	Name	Care C
<input type="checkbox"/>	ICC - Homel...	Gathering required docum...	0

Care Team Members

- Brenda Truong, Service Chief II
- Jennifer Dinicola, Program Manager/Administrative Manager II
- # Nicolalde, Jennifer, OC Public Defender Director
- # jsilveira@voala.org
- Brian Shumate, DPO II

1 - 13 of 13 | Page 1



Client Authorization

ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307

Power Apps | SOCDIS

Search

New look

Home

Recent

Pinned

Care Management

Case Worker Dashbo...

Case Worker Dashbo...

Search Clients

Clients

Appointments

Alerts

Client: David Smith - Sav

Contact

Summary Contact Info Addresses

David@test.mail

View Virtual Client Record

Client Authorization:

Client has given authorization

Start Date: 1/4/2024

Expiry Date: 1/3/2025

Revoke/Modify Authorization

Assessment progress

Goal progress

Actions progress

AHC Open Assessments

0

Workflow - Google Chrome

ochca.preprod.simpligov.com/preprod/portal/ShowWorkFlow/ShowWorkflowDetail/5a...

Client Search



CARE PLUS PROGRAM

AUTHORIZATION TO USE & DISCLOSE PHI & PII

The Care Plus Program is designed to improve health outcomes by coordinating care among Participating Entities through information sharing. Your authorization to share your information will allow Care Plus Program Participating Entities to disclose to each other confidential information including personally identifying information and protected health information that pertains to you for purposes of coordinating your care. The Participating Entities will utilize tools including the

Kuldeep Joshi Service Coordinator ICM001058 ICM Key

OC Public Defender Director

#jsilveira@voala.org

Brian Shumate DPO II

1 - 13 of 13 Page 1

Assessments



VOA Case Note

The screenshot shows a web browser window displaying a Dynamics CRM case record. The browser address bar shows the URL: `ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307`. The Dynamics CRM interface includes a top navigation bar with 'Power Apps' and 'SOCDIS' labels, a search bar, and a 'New look' toggle. A left-hand navigation pane lists various options: Home, Recent, Pinned, Care Management, Case Worker Dashboards, Search Clients, Clients (selected), Appointments, and Alerts. The main content area shows the case record for 'Client: David Smith - Saved', with the user 'Kuldeep Joshi' (Service Coordinator) and 'ICM001058' (ICM Key) associated with it. The 'Notes' tab is active, displaying a note with the following text: 'Participant Entered in Shelter Stabilization. Regional Care Coordination engaged the participant on 1/4/2024; and completed the referral process into the Bridges at Kraemer Place Homeless Shelter. Consequently, the participant was stabilized into shelter placement successfully.' The note was modified on 6/18/2024 at 11:07 PM by user #jsilveira@voala.org. The interface also includes a toolbar with actions like Save, Deactivate Client, Connect, Delete, Refresh, and Check Access, as well as a 'Share' button.

ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307

Power Apps | SOCDIS

Search

New look

Client: David Smith - Saved

Contact

Kuldeep Joshi
Service Coordinator

ICM001058
ICM Key

Summary Contact Info Addresses Care Plan Care Team **Notes** Related

View more

Modified on: 6/18/2024 11:07 PM

Note modified by #jsilveira@voala.org

Participant Entered in Shelter Stabilization

Regional Care Coordination engaged the participant on 1/4/2024; and completed the referral process into the Bridges at Kraemer Place Homeless Shelter. Consequently, the participant was stabilized into shelter placement successfully.

Modified On: 6/18/2024 11:07 PM

View less



VOA Case Note

The screenshot displays a web application interface for a case management system. The browser address bar shows the URL: `ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307`. The application header includes "Power Apps" and "SOCDIS" on the left, a search bar in the center, and "New look" with various utility icons on the right. A left-hand navigation pane lists options such as Home, Recent, Pinned, Care Management, Case Worker Dashboards, Search Clients, Clients, Appointments, and Alerts. The main content area shows a record for "Client: David Smith - Saved" with a "Contact" type. The user "Kuldeep Joshi" (Service Coordinator) is associated with the record, and the ICM Key is "ICM001058". A tabbed interface at the top of the record view includes Summary, Contact Info, Addresses, Care Plan, Care Team, Notes (selected), and Related. The "Notes" tab contains a single note with the following text: "Modified on: 6/18/2024 11:00 PM", "Note modified by #jsilveira@voala.org", "Participant Enrolled into Care Plus Program - Intensive Care Coordination", "Through continued engagement with the participant, Regional Care Coordination became more aware of the participant's serious and persistent mental illness (SPMI) concerns. As such, the Regional Care Coordination team determined the participant would benefit from more intensive care coordination. Consequently, on 2/5/2024 the participant was disenrolled from the Care Plus Program's (CPP) virtual care coordination (VCC) and instead be newly enrolled into CPP's intensive care coordination (ICC). This enrollment into ICC now allowed the participant to benefit from the multidisciplinary team (MDT) cohort meeting on a biweekly basis to discuss the care coordination and care delivery model for the participant through a myriad of social service departments regarding his mental acuity concerns.", and "Modified On: 6/18/2024 11:00 PM". A "View less" link is visible at the bottom of the note.



Program Enrollment

ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307

Power Apps | SOCDIS

Search

New look

Client: David Smith - Saved
Contact

Kuldeep Joshi
Service Coordinator

ICM001058
ICM Key

Summary | Contact Info | Addresses | Care Plan | Care Team | Notes | Related

Client Profile - David Smith

Age: 39
Birth Date: 10/11/1984
Gender: Male

David@test.mail

View Virtual Client Record

Client Authorization:
Client has given authorization
Start Date: 1/4/2024
Expiry Date: 1/3/2025

Programs

<input type="checkbox"/>	Status Re...	Name	Start ...	Pro
<input type="checkbox"/>	Enroll...	Homeless Cohort - ICC	2/5/2024	
<input type="checkbox"/>	Endin...	Homeless Cohort - VCC	1/3/2024	

Rows: 2

Recent Modified Goals

<input type="checkbox"/>	I	Program Typ...	Name	Care
<input type="checkbox"/>	.	ICC - Homel...	Gathering required docum...	0

Care Team Members

- Brenda Truong
Service Chief II
- Jennifer Dinicola
Program Manager/Administrative Manager II
- # Nicolalde, Jennifer
OC Public Defender Director
- # jsilveira@voala.org
- Brian Shumate
DPO II

S SOCDIS



VOA Case Note

The screenshot displays a web browser window with the URL `ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307`. The application is identified as 'Power Apps | SOCDIS'. The top navigation bar includes a search field and utility icons for 'New look', '+', 'Share', and user profile. A left-hand navigation pane lists options: Home, Recent, Pinned, Care Management (with sub-items: Case Worker Dashbo..., Search Clients, Clients, Appointments, Alerts), and Alerts.

The main content area shows a record for 'Client: David Smith - Saved' with the role 'Contact'. The user 'Kuldeep Joshi' (Service Coordinator) is associated with the record, and the ICM Key is 'ICM001058'. Below the record header are tabs for 'Summary', 'Contact Info', 'Addresses', 'Care Plan', 'Care Team', 'Notes' (which is active), and 'Related'. The 'Notes' tab displays a 'Timeline' section with a search bar and an 'Enter a note...' input field. A recent note is shown with the following content:

Modified on: 6:39 PM
Note modified by # jsilveira@voala.org
Participant SSA Benefits Established

Upon further engagement with the participant, Regional Care Coordination was able to determine that the participant was not actively receiving any state benefits through Social Services Agency. Through the Multidisciplinary (MDT) Cohort meetings, Regional Care Coordination was able to work with Social Services Agency to schedule a telephonic interview to enroll in state benefits. The program participant was then successfully enrolled in CalWorks, CalFresh, and MediCal.

Modified On: 6:39 PM
View less



VCR - Benefits

ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307

Power Apps | SOCDIS | Search | New look | Share | ICM001058 ICM Key

VCR

Virtual Client Record

Refresh

Benefits

Programs

Case Number	Program Name	Individual Status	Effective Date	End Date
0IH63F6	CalWORKs	Active	02/15/2024	02/15/2025
0IH63F6	Medi-Cal	Active	02/15/2024	02/15/2025
0IH63F6	CalFresh	Active	02/15/2024	02/15/2025

CalFresh

Case Number - Status	Name	Last 4 SSN - Relationship	Effective End Date	Recertification Date
0IH63F6-Active	Max Smith	5283 - Sibling (full or half)	02/15/2024	

Medi-Cal
Start Date: 1/4/2024
Expiry Date: 1/3/2025



VOA Case Note

The screenshot displays a web application interface for a case management system. The browser address bar shows the URL: `ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307`. The application header includes "Power Apps" and "SOCDIS" on the left, a search bar in the center, and "New look" with various utility icons on the right. A left-hand navigation pane lists options such as Home, Recent, Pinned, Care Management, Case Worker Dashboards, Search Clients, Clients, Appointments, and Alerts. The main content area shows a record for "Client: David Smith - Saved" with a profile picture and the role "Contact". The user "Kuldeep Joshi" (Service Coordinator) is logged in, with "ICM001058" as the ICM Key. Below the client information, a tabbed interface shows "Notes" as the active tab. A note is displayed with a timestamp of "6/18/2024 11:11 PM" and a modification history entry: "Note modified by # jsilveira@voala.org". The note text reads: "Participant Exited from Shelter Stabilization. Regional Care Coordination was informed that the participant was exited from stabilization at Bridges at Kraemer Place Homeless Shelter on 4/12/2024 due to noncompliance with shelter placement guidelines and expectations. The participant is now unsheltered; with outreach to be conducted by the Regional Care Coordination team and the Orange County Outreach & Engagement to find and connect with the participant on next steps regarding stabilization opportunities." The note is followed by another timestamp "Modified On: 6/18/2024 11:11 PM" and a "View less" link.



VCR - County Jail

Browser address bar: ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307

Power Apps | SOCDIS | Search | New look | Share | ICM001058 ICM Key

VCR

Virtual Client Record

Refresh

- Program Overview
- Extended Demographics
- Physical Health
- Behavioral Health
- Correctional Health Services
- County Jail

Booking Number	Booking Status	Date Booked Reason	Date Released Reason
x680799	Released	04/13/2024	05/12/2024

Rows: 1



Client Alert

← → ↻ ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307 ☆ 👤 ⋮

Power Apps | SOCDIS New look + 🔔 ⚙️ ? 👤

- Home
- Recent
- Pinned
- Care Management
 - Case Worker Dashbo...
 - Case Worker Dashbo...
 - Search Clients
 - Clients
 - Appointments
 - Alerts

← | 📄 | 🗑️ | 💾 Save | 💾 Save & Close | + New | 🗑️ Deactivate Client | 🔗 Connect | 🗑️ Delete | ↻ Refresh | 🔍 Check Access | 📄 Process | ⚙️ Flow | 📄 Word Templates | ⋮ | [Share](#)

 **Client: David Smith** - Saved Kuldeep Joshi Service Coordinator | ICM001058 ICM Key

Summary | Contact Info | Addresses | Care Plan | Care Team | Notes | Related

Number of Care Goals: 2
Last updated: 6/20/2024 12:05 AM

Agreed to Participate
On 1/4/2024 Client was found in Anaheim while doing canvassing outreach. He was referred to Bridge...
Overdue 6/19/2024 9:49 PM

- Note modified by # jsilveira@voala.org**
Status Update: Participant Remains Enrolled in Care Plus Program: Intensive Care Coordination
As of 5/28/24, the participant continues to be actively enrolled in the Care Plus Program (CPP) Intensiv...
6/18/2024 11:55 PM
- Note modified by # jsilveira@voala.org**
Participant Released from Orange County Sheriff's Department Custody
The Regional Care Coordination team was present on 5/12/2024 with the local Full Service Partnership...
6/18/2024 11:44 PM
- Note modified by # jsilveira@voala.org**
Apprised of the participant's sentence end date (SED) of 5/12/2024; the Regional Care Coordination te...
6/18/2024 11:37 PM
- Note modified by # jsilveira@voala.org**
Participant Sentence End Date Established
The Jail to Community Re-entry Program (JCRP) has informed the Regional Care Coordination team th...
6/18/2024 11:31 PM
- Note modified by # jsilveira@voala.org**

0 - 0 of 0 | Page 1

Note Text

Search timeline

Enter a note...

Recent

- KJ** Modified on: 6/17/2024 4:20 PM
Alert from: Kuldeep Joshi Active
It has been reported that this Client has been arrested on 2024-04-13.
Last Updated: 6/17/2024 4:20 PM
[View less](#)



VOA Case Note

← → 🔄 ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307 ☆ 👤 ⋮

Power Apps | SOCDIS New look + 🔔 ⚙️ ? 👤

Home Recent Pinned Care Management Case Worker Dashbo... Case Worker Dashbo... Search Clients Clients Appointments Alerts

Client: David Smith - Saved Kuldeep Joshi Service Coordinator ICM001058 ICM Key

Summary Contact Info Addresses Care Plan Care Team **Notes** Related

Modified on: 6/18/2024 11:20 PM
Note modified by # jsilveira@voala.org

Participant Arrested; Residing in Orange County Custody
Regional Care Coordination became apprised that the participant was arrested and placed into the custody of Orange County Sheriff's Department on 4/13/2024. Regional Care Coordination will conduct jail in-reach efforts to connect and engage with the participant while remanded to discuss delivery of care while both in custody and upon release from custody.

Regional Care Coordination will also connect with the Jail to Community Re-Entry Program (JCRP), the Orange County Sheriff's Department (OCSD), and the Orange County Public Defender's Office (OCPD) at the next biweekly Care Plus Program Multidisciplinary Team cohort meeting to apprise all of the participant's updated status in custody along with next steps regarding legal proceedings, future court dates, sentencing, mental health assessments and all other pertinent opportunities that would serve to the betterment of the participant while in custody.

Modified On: 6/18/2024 11:20 PM
View less



VCR - Correctional Health

ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307

Power Apps | SOCDIS | Search | New look | Share | ICM001058 ICM Key

VCR

Virtual Client Record

Refresh

Correctional Health Services

# Psych Observations	# LPS Admissions
8	4

Medical Conditions

- Mental Health Hold
- Safety gown
- MH hold - DTS
- MOD L

Mental Health Conditions

- Post-traumatic stress disorder, chronic
- Major Depressive Disorder

Start Date: 1/4/2024

SOCDIS



HCA Correctional Health Case Note

Power Apps | SOCDIS | Search | New look | + | ? | [User Icon]

Client: David Smith - Saved | Kuldeep Joshi Service Coordinator | ICM001058 ICM Key

Summary | Contact Info | Addresses | Care Plan | Care Team | Notes | Related

participant through a myriad of social service departments regarding his mental acuity concerns.
Modified On: 6/18/2024 11:00 PM
View less

BT | Modified on: 6/17/2024 7:04 PM | Note modified by Brenda Truong | JCRP Linkage Update | JCRP coordinated in-reach with FSP program. FSP program provided an update that the client has been accepted to program as client meets their program eligibility criteria. JCRP had updated client of program acceptance. JCRP emails VOALA to informed them client's acceptance of FSP. JCRP provided VOALA the date and time of client's intake appointment at the FSP. JCRP completes the client's discharge plan and place a notification to hold for OCSO for program pick up on day of release.
Modified On: 6/17/2024 7:04 PM
View less

BT | Modified on: 6/17/2024 6:55 PM | Note modified by Brenda Truong | JCRP to provide case management and linkage | Client was seen by JCRP to discuss client's past and present mental health symptoms. Explored client's mental health history treatment and services that he had received. Acknowledged client's challenges with past mental health services. Discuss his current symptoms and barriers. Educated client on VOALA and mental health services such as Full-Service Partnerships (FSPs). Client was agreeable in connecting with VOALA and FSPs. JCRP completed FSP linkage/referral form and sent to the FSP. JCRP emailed VOALA to informed them of client's interest in connecting with VOALA. Provide VOALA client's current progress and presentation. JCRP informed VOALA that a referral/linkage form has been sent to FSP and an update will be provided.
Modified On: 6/17/2024 6:55 PM
View less

BT | Modified on: 6/17/2024 6:46 PM | Note modified by Brenda Truong | JCRP to build rapport | JCRP identified client has a Sentence End Date (SED). JCRP met with client within OCJ to build rapport and identify client's Mental Health Concerns. Educated client JCRP's role in coordination of care and linkage in preparation of client's release date. Explored client's thoughts and interests in acceptance JCRP services. Client agreed to JCRP services. JCRP to follow up on client's program appropriateness at next session.
Modified On: 6/17/2024 6:46 PM
View less



VOA Case Note

The screenshot shows a web browser displaying a Power Apps interface for a case note. The browser address bar shows the URL: `ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001d8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001d8097307`. The Power Apps header includes the text "Power Apps | SOCDIS" and a search bar. The left-hand navigation pane lists various options: Home, Recent, Pinned, Care Management (with sub-items like Case Worker Dashboards and Search Clients), Clients, Appointments, and Alerts. The main content area is titled "Client: David Smith - Saved" and "Contact". It features a tabbed interface with "Notes" selected. The notes are as follows:

- Note 1:** Modified on: 6/18/2024 11:44 PM. Note modified by [jsilveira@voala.org](#).
Participant Released from Orange County Sheriff's Department Custody
The Regional Care Coordination team was present on 5/12/2024 with the local Full Service Partnership (FSP) provider to assist in picking up the participant from custody on his sentence end date (SED). The participant was picked up successfully and taken to the FSP provider's office to complete intake paperwork necessary to having the individual placed in a FSP provider sponsored room and board stabilization opportunity. The participant adhered and complied with these requirements and was successfully stabilized in the aforementioned room and board sponsored by the FSP provider.
The Regional Care Coordination team also made plans to transport the participant to the Orange County Probation Department the following day (5/13/2024) to meet with the participant's newly assigned Probation Officer for further directives and compliance guidelines. The participant agreed and appeared amenable to the planned itinerary on 5/13/2024.
Modified On: 6/18/2024 11:44 PM
View less
- Note 2:** Modified on: 6/18/2024 11:37 PM. Note modified by [jsilveira@voala.org](#).
Apprised of the participant's sentence end date (SED) of 5/12/2024; the Regional Care Coordination team has reached out to connect with the Orange County Public Defender's Office (OCPD) to confirm any next steps or responsibilities of the participant upon their release from the custody of the Orange County Sheriff's Department (OCSD).
Ranateh Shaghoorian (OCPD) confirmed with the Regional Care Coordination team the participant's need to follow up with outstanding stipulations related to the participant's sentencing and the need to connect the participant to the Orange County Probation Department upon the participant's release to avoid further legal proceedings related to probation violations
As such, the Regional Care Coordination team will ensure the participant is connected to the Orange County Probation Department upon release from custody to ensure the participant is in compliance with legal sentencing terms upon custody release.
Modified On: 6/18/2024 11:37 PM
View less
- Note 3:** Modified on: 6/18/2024 11:31 PM. Note modified by [jsilveira@voala.org](#).
Participant Sentence End Date Established
The Jail to Community Re-entry Program (JCRP) has informed the Regional Care Coordination team that while still in custody, the participant has been assessed and met the eligibility criteria to be enrolled into the program of a Full Service Partnership (FSP) provider. This FSP provider will be scheduled to pick up the participant on the newly established sentence end date (SED) of 5/12/2024; where the participant will be released from the custody of the Orange County Sheriff's Department (OCSD).
JCRP has placed a release hold with the OCSD to ensure the participant will be picked up from custody by the FSP provider (with the Regional Care Coordination team present to assist). JCRP has connected the Regional Care Coordination team to the FSP provider, so that the Regional Care Coordination team can assist the FSP Provider with any transportation needs or trust/rapport transference in part due to the Regional Care Coordination team's history with the participant during and prior to their custody stay with OCSD.
Modified On: 6/18/2024 11:31 PM



Client Alert

ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307

Power Apps | SOCDIS

Client: David Smith - Saved
Contact

Kuldeep Joshi Service Coordinator | ICM001058 ICM Key

Summary | Contact Info | Addresses | Care Plan | Care Team | Notes | Related

Number of Care Goals: 2
Last updated: 6/20/2024 12:05 AM

Agreed to participate
On 1/4/2024 Client was found in Anaheim while doing canvassing outreach. He was referred to Bridge...
Overdue 6/19/2024 9:49 PM

Note modified by #jsilveira@voala.org
Status Update: Participant Remains Enrolled in Care Plus Program: Intensive Care Coordination
As of 5/28/24, the participant continues to be actively enrolled in the Care Plus Program (CPP) Intensiv...
6/18/2024 11:55 PM

Note modified by #jsilveira@voala.org
Participant Released from Orange County Sheriff's Department Custody
The Regional Care Coordination team was present on 5/12/2024 with the local Full Service Partnership...
6/18/2024 11:44 PM

Note modified by #jsilveira@voala.org
Apprised of the participant's sentence end date (SED) of 5/12/2024; the Regional Care Coordination te...
6/18/2024 11:37 PM

Note modified by #jsilveira@voala.org
Participant Sentence End Date Established
The Jail to Community Re-entry Program (JCRP) has informed the Regional Care Coordination team th...
6/18/2024 11:31 PM

Note modified by #jsilveira@voala.org

Note Text

Search timeline

Enter a note...

Recent

KJ Modified on: 6/13/2024 9:08 PM

Alert from: Kuldeep Joshi
Active

It has been reported that this Client has been released from jail on 2024.06.13
It has b
jail on 2024-02-16.
Last Updated: 6/13/2024 9:08 PM
View less



VCR – Community Corrections

ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307

Power Apps | SOCDIS | Search | New look | Share | ICM001058 ICM Key

VCR

Virtual Client Record

Refresh

Community Corrections

Officer Name	Officer Email
Schumate, Brian	Brian.Schumate@prob.ocgov.com

Probation Status	End Date
Active	05/05/2026

Rows: 1

- Street Outreach
- Rental Assistance
- Shelter and Housing Programs
- Housing Navigation

Start Date: 1/4/2024

SOCDIS



Probation Case Note

ocit-icm-uat.crm9.dynamics.com/main.aspx?appid=d98086fe-6600-ef11-a1fe-001dd8068952&pagetype=entityrecord&etn=contact&id=c877eb6b-6d27-ef11-840a-001dd8097307

Power Apps | SOCDIS | Search | New look | + | ?

Client: David Smith - Saved | Kuldeep Joshi | ICM001058 | Service Coordinator | ICM Key

Summary | Contact Info | Addresses | Care Plan | Care Team | **Notes** | Related

Timeline

Search timeline

Enter a note...

Recent

BS Modified on: 6/19/2024 10:32 PM

Note modified by Brian Shumate

Status Update: Probation Check-In

05/13/24 - Office Visit - Client reports following release from Orange County Jail as directed by the Court. Probation indoctrination completed, client signs and retains copies of his terms and conditions of probation supervision and the rules/expectations are reviewed in their entirety. Client reports he is homeless/transient but states his area location is Anaheim. The client is directed to report back to Santa Ana Probation on 05/27/24 for further update on progress and/or any additional resources that Probation can facilitate. Next Office Visit 05/27/24

Modified On: 6/19/2024 10:32 PM

View less



Care Plan

- Home
- Recent
- Pinned
- Care Management
- Case Worker Dashbo...
- Case Worker Dashbo...
- Search Clients
- Clients
- Appointments
- Alerts

Save Save & Close New Deactivate Client Connect Delete Refresh Check Access Process Flow Word Templates Run Report Share


Kuldeep Joshi
Service Coordinator | ICM001058
ICM Key

Summary Contact Info Addresses Care Plan Care Team Notes Related



Program Goals and Actions/Tasks

+ New Care Goal Refresh Flow Run Report Filter by keyword

Group By: (no grouping)

Care Goal Status	Program	Name	Open Activities	Outcome WCM	Target Date	Created On
Closed	Homeless Cohort - VCC	Functioning in daily activities	0	---	---	6/17/2024 11:49 PM
Open	Homeless Cohort - ICC	Gathering required documentation	1	---	---	6/17/2024 11:54 PM

Page 1

Actions/Tasks

+ New Action/Task Refresh Flow Run Report

Status Reason	Program (Care Goal)	Care Goal	Subject	Regarding	Owner	Priority	Due Date
Completed	Homeless Cohort - VCC	Functioning in daily activities	House Keeping	David Smith	#jsilveira@voala.org	Normal	4/12/2024 11:49 PM
In Progress	Homeless Cohort - ICC	Gathering required documentation	Obtain Documentation Checklist	David Smith	#jsilveira@voala.org	Normal	7/2/2024 11:54 PM
Completed	Homeless Cohort - VCC	Functioning in daily activities	Personal Hygenie	David Smith	#jsilveira@voala.org	Normal	4/12/2024 10:00 A...
Completed	Homeless Cohort - VCC	Functioning in daily activities	Responsible Tenancy	David Smith	#jsilveira@voala.org	Normal	4/12/2024 11:49 PM

Rows: 4



Graduation from ICC to VCC

Power Apps | SOCDIS

Client: David Smith - Saved

Summary | Contact Info | Addresses | Care Plan | Care Team | Notes | Related

Age: 39
Birth Date: 10/11/1984
Gender: Male

View Virtual Client Record

Client Authorization:
Client has given authorization
Start Date: 1/4/2024
Expiry Date: 1/3/2025
Revoke/Modify Authorization

Programs

Status Reason	Name	Start ...	Program T...	Cre...
Enrolled	Homeless Cohort - VCC	6/20/2024		6/20/2024
Ending Care Plan	Homeless Cohort - ICC	2/5/2024		6/18/2024
Completed	Homeless Cohort - VCC	1/3/2024		6/18/2024

Rows: 3

Recent Modified Goals

Program Typ...	Name	Care Go...	Open Acti...	M
VCC - Home...	Financial Stability	Open	0	
VCC - Home...	Follow up on identified ini...	Open	0	
VCC - Home...	Functioning in daily activiti...	Open	0	
VCC - Home...	Gathering required docum...	Open	0	
ICC - Homel...	Gathering required docum...	Open	1	

Rows: 9

Care Team Members

- Brenda Truong
Service Chief II
- Jennifer Dinicola
Program Manager/Administrative Manager II
- # Nicolalde, Jennifer
OC Public Defender Director
- # jsilveira@voala.org
- Brian Shumate
DPO II

1 - 13 of 13 | Page 1

Assessments

AHC Open Assessments 0



Questions?

The background of the slide features a large, faint, circular seal of Orange County, California. The seal contains a landscape with mountains, a river, and oranges, surrounded by the text "ORANGE COUNTY OF CALIFORNIA".

Thank You

