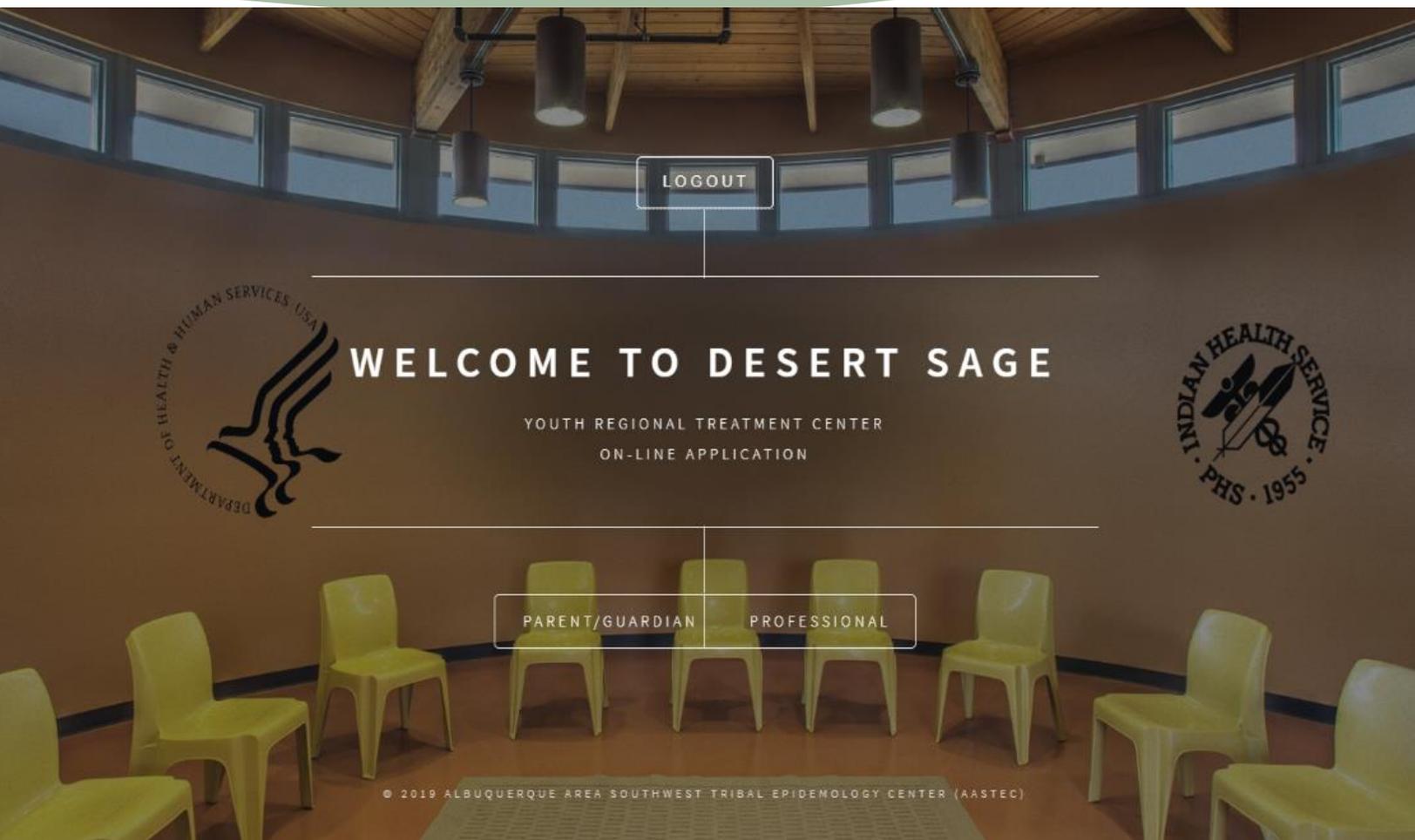


# Desert Sage Youth Regional Treatment Center Online Application Portal USER GUIDE



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## The Purpose and Use of the Portal

The Desert Sage Youth Regional Treatment Center Online Application Portal is designed to create, maintain, and manage applications for youth needing to be enrolled in the Desert Sage Youth Treatment Regional Center. This database is an online application portal that can be used by parents and/or guardians, clinical staff at referring clinics, and Desert Sage administration. Each of the previously listed user groups has a particular level of access to the site with corresponding security measures in place.

- **Parents/Guardians:** This user group can create an account and fill out an application. They are only able to access and view applications submitted using their unique username and password.
- **Clinical Staff:** This user group must request an account through Desert Sage, and once the account is created and a clinic site is assigned, this group can access and view all applications submitted through and/or transferred to the clinic site.
- **Desert Sage Staff and Administration:** This user group has the widest access to the portal as they can access and view all applications submitted to the portal. In addition to granting accounts to clinical staff at referring sites, they can also assign particular applications to specific clinic sites in the event that an application needs to be moved.

This portal is built in a secure, HIPAA-certified platform to ensure the safety and confidentiality of patient/client information. Each user group must login to the site using a unique username and password in order to enter and access information. These elements support the security of the data.

## Introduction: Welcome to Desert Sage

Website Address: <https://db.aastec.net/YRTC/index.html>

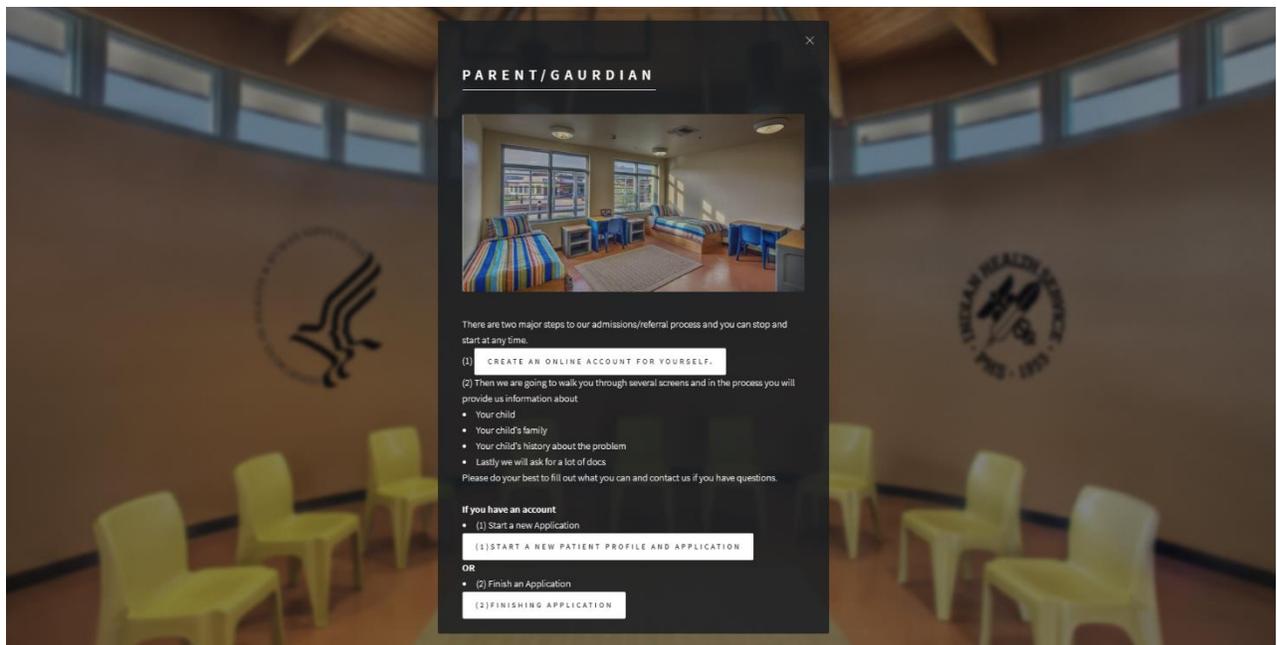
The opening webpage directs individuals to enter as either a **Parent/Guardian** or a **Professional** (this category includes both referring clinic staff and Desert Sage administration).



## Using the Desert Sage Platform: Parent/Guardian

If you are a parent and/or guardian of the youth applying for admission to Desert Sage Youth Regional Treatment Center, click on the **Parent/Guardian** button on the homepage. From here it will take you to a new screen with three options.

1. **Create an online account for yourself** – creating an account for yourself. This step is required in order to securely fill out an application for a youth.
2. **Start a new patient profile and application** – initiating an application for the youth. This step involves creating a patient profile and providing the required application information.
3. **Finish application** – completing and submitting the application. This step provides the option to complete an unfinished application if needed.



## Creating an Online Application

1. Create an online account for yourself by first entering your first and last name, your phone number, and your relationship to the youth.
2. Next develop a username. This username must be unique, so if an error message pops up when you try to submit saying that the name has already been chosen, you must chose a different username.
3. Enter and confirm a valid email address where you would like to receive any notifications regarding the youth's application status.
4. Lastly, develop a secure password containing at least 8 characters which includes at least one number and both lower and upper case letters.

You must create an account before you begin. All fields are required to create an account.

First & Last Name *	Phone where you can be reached during the day *	Your Relationship to Youth *
<input type="text" value="Haley McBeth"/>	<input type="text" value="(555)555-5555"/>	<input type="text" value="mother"/>

(Your user name and email must be unique)

User name *	Confirm Email *
<input type="text" value="hmcbeth"/>	<input type="text" value="hmcbeth@email.com"/>

Your password must be at least 8 characters, including at least 1 number and both lower and upper case letters.

Password *	Confirm Password *
<input type="password" value="*****"/>	<input type="password" value="*****"/>

[Cancel](#)

**Please click on "Submit" to  
enter and save your account information.  
You will automatically be taken the next step.**

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## Starting a New Application

Once the parent/guardian online account is created, the process of submitting an application for the youth can begin.

1. For a complete submission, please make sure to fill out at least any of the fields that are in red. These are required to move on to the next page of the application. Once this page is complete, click the SUBMIT button at the bottom of the page to move onto the next section of the application.

Patient Information: \*these questions are required

First Name *	Middle Name	Last Name *	Other Name/Aliases	Suffix	
Janet		McBeth			
Sex *	Marital Status	Primary Language	Race (select all that apply)	Ethnicity	Religious Preference (Select all that apply)
<input type="radio"/> Male <input checked="" type="radio"/> Female <input type="radio"/> Non-conforming	Single/Never Married	English	White	Not Hispanic/Latino	Nondenominational

Birth Information:

DOB *	City Place of Birth	Place of Birth (City/State)	Born outside of US
07/17/2002		Alabama	<input type="checkbox"/>

Tribal Affiliation(s):

Tribal Affiliation Primary

Tribal Affiliation Other (if NOT on list or more details is needed)

Medical Insurance Information:

Medicaid/Medi-Cal	<input checked="" type="radio"/> Yes <input type="radio"/> No	Policy Number	123456789	Effective Date	11/13/2001
OtherHealthInsure	<input type="radio"/> Yes <input checked="" type="radio"/> No				

**SUBMIT**

2. The next page asks to fill out Family Information \*Important to note that there is a bottom scroll bar with more information fields to be filled out\*

[Back to Main Page](#) [Logout](#)

Please provide as much information about the patient's family life.

**Family Information:**

Pt Placement  
 Foster Setting  Home  Hospital  Juvenile Detention  Other Family  Other Non-Family

**Legal Guardian Information**

Name of Legal Guardian	Legal Guardian Relationship	Phone Number		
Hailey McBeth	Mother	000-000-0000		
Legal Guardian's Address	Legal Guardian's City	Legal Guardian's State	Legal Guardian's ZIP Code	Mother's Information (if not listed above):
123 ABC Street	Sesame	Iowa	11111	
Mother's First Name	Mother's Last Name	Mother's Phone Number		
		( ) - -		
Mother's Street Address	Mother's City	Mother's State	Mother's ZIP Code	Mother Resides Outside US
		Please Select from list		<input type="checkbox"/>

**Father's Information (if not listed above):**

Father's First Name	Father's Last Name	Father's Phone Number	Father's Street Address	Father's City	Father's State
Shakespeare	McBeth	2222222222	123 ABC Street	Sesame	Iowa

ApplicationID 22

**CONTINUE**

- Next fill out Additional History. \*Important to note that there is a up/down scroll bar with more information fields to be filled out\*

Back to Main Page | Logout

Please provide us with as much history as you can about your child so we know how to help.

ApplicationID  
22

**Education History:**

Name of last School attended: Some High school | City/State: Iowa | Last Grade Completed: 4th 5th 6th 7th 8th 9th 10th 11th 12th

Attending special classes: Yes No | IEP/504 plan?: Yes No | Has been suspended or expelled from school: Yes No

Other school related comments: [Text Area] 64000

**Legal History:**

Current and/or pending legal charges: Yes No | If yes, please describe: physical violence and destruction of personal property 63946

Social Service Involvement: [Text Area] 255 | Indian Child Welfare Act Involvement: [Text Area] 255

**Emotional/Behavioral:**

**To enter substances used**, click on the button that says View/Add Current/Past Substance Abuse/Use. A new window will open allowing where you can enter information. All fields (with the exception of “Primary Substance”) are required. Click the ADD button to add a substance to the list until the list is complete. Close out of the window. \*Your list will be saved.\* To re-open the window and edit/add more information, click on the button again.

Other school related comments: [Text Area]

**Legal**

Current and/or pending legal charges: Yes No

Social Service Involvement: [Text Area]

**Substances Used**

All fields except Primary Substance are required.

CURRENT/PAST SUBSTANCE	MONTH LAST USED	YEAR LAST USED	HOW MUCH	FREQUENCY	PRIMARY SUBSTANCE
drugs	Mar	2019	dose	daily	No

Records 1-1 of 1

Please click on the link below to enter Substances Abused/Used

[View/Add Current/Past Substance Abuse/Use](#)

**Emotional/Behavioral**

History of physical violence/aggression towards others?  
Yes No

History of suicidal ideation/attempt?

**To enter medications used**, click the box that says “Please check box if patient currently prescribed medications.” A button will appear that says “View/Add Medications.” Click on this button and a new

window will open allowing where you can enter information. All fields are required. Click the ADD button to add a substance to the list until the list is complete. Each entry can be edited or deleted. Close out of the window. \*Your list will be saved.\* To re-open the window and edit/add more information, click on the button again.

**Please click on the link below to enter Substances**  
[View/Add Current/Past Substance Abuse/Use](#)

**Emotional/Behavioral**

History of physical violence/aggression towards others?  
 Yes  No

History of suicidal ideation/attempt?  
 Yes  No

History of self-injurious behavior?  
 Yes  No

Co-morbid Mental Health Conditions

Clinical indications for residential care (Reason cannot be treated in less restrictive environment.) Please cite applicable ASAM placement criteria.

Medical conditions  Please check box if Patient Currently Prescribed Medications

**Please click on links below to enter Currently Prescribed Medications**  
[View/Add Medications](#)

**Referring Provider Information**

**app-medlist - Google Chrome**  
c0arw037.caspio.com/dp/0ee44000a261a085c5f541d5bab37ApplicationID=17

**All fields are required**

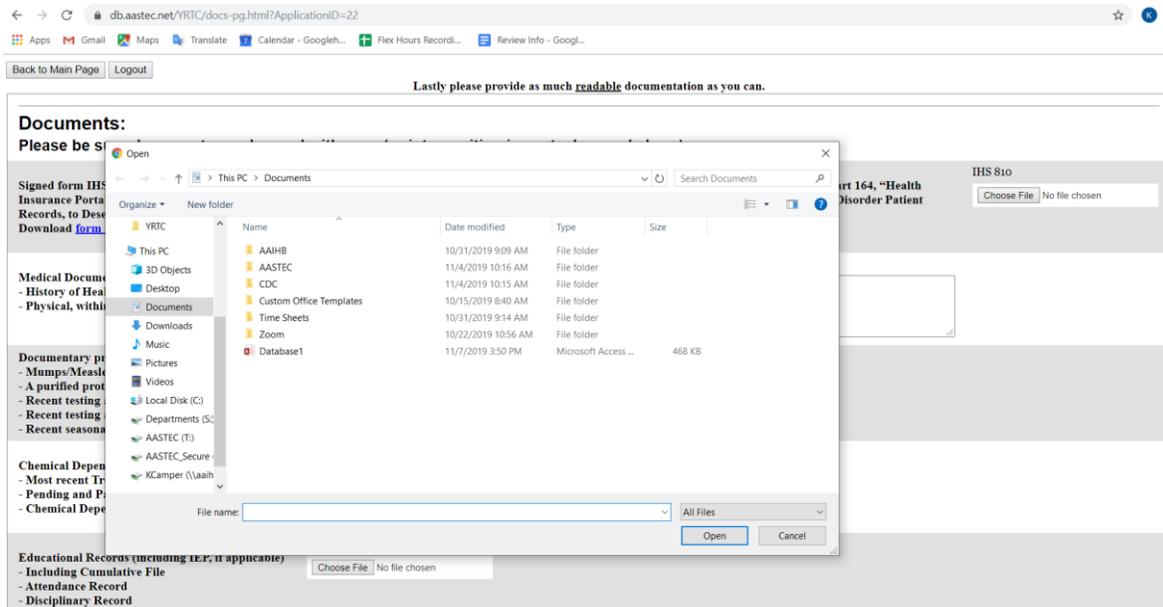
NAME OF MEDICATION	DOSE	MEDICAL CONDITION	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="ADD"/>
Medications	100mg	Conditions	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Records 1-1 of 1

## Uploading and Saving Documents

The final step in the application requires certain documents to be uploaded. \*Please make sure that the documents that are uploaded are **legible** and **easy to read**.\* There is a scroll down bar here as well.

1. To add a file, first make sure that the file is saved on the computer that you are using to complete the application, then click “choose file”, and a new open folder will appear on your screen where you can browse and double click on the document that you would like to add.



2. Press UPDATE and you will be redirected to an overview of your entire application. If you would like to print or save a PDF copy of the application, right click on the screen and click PRINT. Review this page before you press UPDATE again at the bottom which will save your application.
3. You will receive a message on the final screen in green letters saying “Data was updated successfully. You may go back to the last screen anytime to add documents or information as needed. Thank you.”

## Using the Desert Sage Platform: Clinical Staff

If you are staff from a referring clinic wanting to submit an application to Desert Sage Youth Regional Treatment Center on behalf of a patient/client, **you must first contact Desert Sage administrative staff to request a username and password** if you do not already have one.



Once your account has been created, an application can be started. From the main page, click on the **PROFESSIONALS** button, then click on the **CLINICAL STAFF ONLY** button.

**Privacy Agreement:** If you have not yet clicked the box agreeing to the HIPAA privacy terms, a message will pop up saying "If you have not yet agreed to the Confidentiality Agreement, please login [Here](#)." You will need to click on the word "Here" and reenter your login information. You will be redirected to a page to read. If you would like to continue, enter your first and last names and check the box showing your agreement, then click the UPDATE button. You will be redirected to the login page and can now login with your HIPAA credentials accepted to begin or update an application.

**CONFIDENTIALITY AGREEMENT**

**AASTEC CONFIDENTIALITY POLICY**  
Protecting the confidentiality of the Tribes and community members that we serve is of utmost importance to AASTEC (Albuquerque Area Southwest Tribal Epidemiology Center). AASTEC's Southwest Indigenous Database (SID) confidentiality policy encompasses the following, whereas "parties" refers to both AASTEC and the Tribal Entity utilizing SID.

1. Both parties agree not to use, nor disclose to any unauthorized person, any confidential information relating to or received from the Southwest Indigenous Database for any reason unless authorized by the Tribal Entity who owns the data, or as required by law. Both parties understand that this applies both during and after employment/voluntary service.
2. Both parties agree not to use or disclose any personal data acquired during work for any purpose that is or may be incompatible with the purposes of that work.
3. Both parties understand that they are required to keep all confidential and personal data securely, and agree to follow all relevant local procedures in doing so.
4. Both parties shall limit disclosure of SID data within its own organization to its directors, officers, partners, members and/or employees having a need to know and shall not disclose SID data to any third party (whether an individual, corporation, or other entity) without prior written consent.
5. Confidentiality is governed by federal law (42 U.S.C § 290dd-2) and regulations (42 CFR, Part 2) which outline the limits of disclosure for patient information and legal access to patient information.

First Name\*

Last Name\*

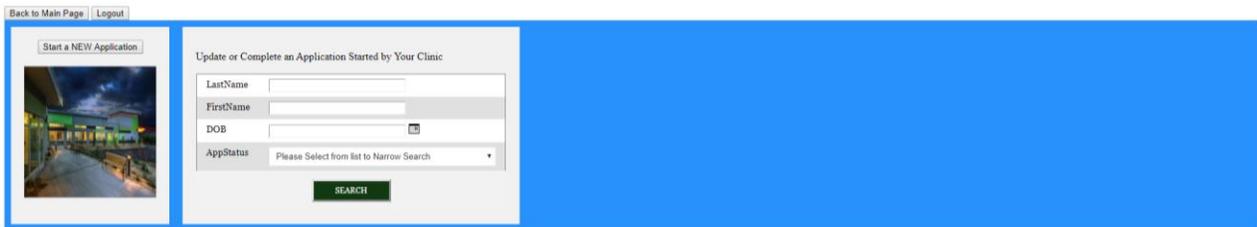
HIPAA Agreement\*  Yes I have read and agree to this Confidentiality Agreement.

**UPDATE**

Please close this window if you do not agree to the terms. Agreement will take you to the Login screen.

Once you login, you will be taken to new screen with four options:

1. **Begin a New Application** – click on the New Application button to the left to start a brand new application.
2. **Search for an Application** – enter in the prompted fields and click SEARCH, or simply click SEARCH for a full list of applications submitted from your location.
3. **Update and/or Finish an Application** – once the desired application has been found, it can be updated by clicking UPDATE APPLICATION on the left side of the name.
4. **More information** – informational links are provided below to explain more about the admissions process.



#### About the View Process

There are two steps in the referral admissions process:

##### Step 1 = Admissions Process

For best consideration, supporting documents must be included with the submission of the Admission Applications  
[Listing of Support Documents \(PDF\)](#)

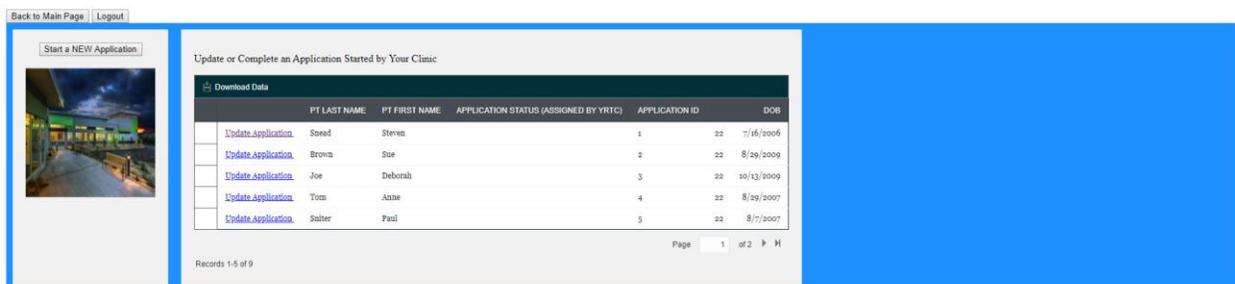
##### Step 2 = Approval Process

- The Admissions Committee reviews the completed Admission Application and all supporting documentation. It is important that all information is complete and submitted for a timely review. If application is approved, the referring program will be contacted to coordinate an admission date.
- On admittance day, forms requiring signature must be signed in the presence of the Intake Coordinator.  
[Listing of Additional Forms Requiring Signature upon Admissions \(PDF\)](#)

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Below is a screenshot of the search box resulting from clicking SEARCH without entering any filters. You can navigate through the pages of individuals by clicking on the navigation arrows below the table.



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## Starting a New Application

1. At any point after this process you will be able to start a new application by clicking the “Start a NEW Application” button over the image in the left-hand corner of the screen and following the steps.

The screenshot shows a web interface with a blue header. On the left, there is a button labeled 'Start a NEW Application' next to a small image of a building. To the right, there is a search form titled 'Update or Complete an Application Started by Your Clinic'. The form includes input fields for 'LastName', 'FirstName', and 'DOB', a dropdown menu for 'AppStatus' with the text 'Please Select from list to Narrow Search', and a green 'SEARCH' button. At the top left of the interface, there are links for 'Back to Main Page' and 'Logout'.

### About the View Process

There are two steps in the referral/admissions process:

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For best consideration, supporting documents must be included with the submission of the Admission Applications  
[Listing of Support Documents \(PDF\)](#)

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[Listing of Additional Forms Requiring Signature upon Admissions \(PDF\)](#)

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2. After clicking the “Start a New Application” button, you will be redirected to the first page of the application where you can fill in the client information. Any fields with a red asterisk next to it are required questions that must be answered in order to progress onto the next page.

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Please fill out as much Patient Information as you can before you click on continue. You will be able to review the complete application at the very end.

**Patient Information: \*these questions are required**

First Name\* Middle Name Last Name\* Other Name/Aliases Suffix

Sex\* Marital Status Primary Language Race (select all that apply) Ethnicity Religious Preference (Select all that apply)

Male  Female  Non-conforming  Single/Never Married  Please select from list  Hispanic/Latino

**Birth Information:**

DOB\* City Place of Birth Place of Birth (City/State) Born outside of US

Alabama

**Tribal Affiliation(s):**

Tribal Affiliation Primary

Tribal Affiliation Other (if NOT on list or more details is needed)

**Medical Insurance Information:**

Medicaid/Medi-Cal  Yes  No

Other Health Insurance  Yes  No

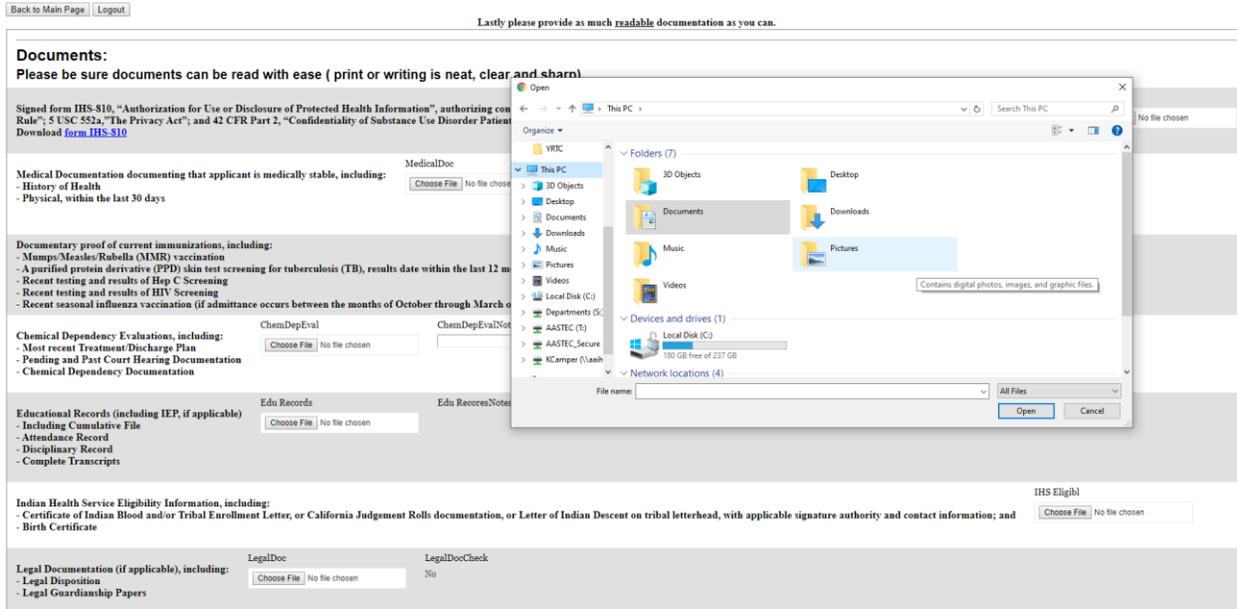
**SUBMIT**

Please click on "Continue" to enter and save Patient Profile part of the application

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3. The application is 4 pages long with the first three being demographic information and the final page being a page dedicated to uploading documents pertaining to the individual.

- In order to complete the Documents page, you will have to browse for the client's information on your computer. This means that you will have these documents saved onto your computer as well.
- To choose a file press the "choose file" button and a folder screen will pop up onto your screen. Find the location on your computer where your patient's information has been saved and click open in order to bring it onto the database screen.



- It is helpful to have your client's information organized on your computer in a location where it can be easily found in order to find it for the upload.
- Finally, after filling out all the appropriate pages for your new patient the database will give you an overview of your entire application so that you can review it before submitting it. You also have the option to print the overview page for your paper records as well.

## Returning to an Application

If you would like to pause in the middle of an application and return to it later that is possible with this database using the following steps.

1. Follow the same steps as above, but if you cannot finish it all at once that is okay. Simply click through all the pages until you go through even the overview page. It will save the patient into the system.
2. The only necessary things to fill out to enter a new patient into the system is to fill out the red print, asterisks.
3. When you are ready to return and finish the application you can search for the individual after logging in and press Update Application and it will open up the information for you to complete.

PT LAST NAME	PT FIRST NAME	APPLICATION STATUS (ASSIGNED BY YRTC)	APPLICATION ID	DOB
Doe	Jane		23	11/1/2019

### About the View Process

There are two steps in the referral admissions process:

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[Listing of Support Documents \(PDF\)](#)

#### Step 2 = Approval Process

- The Admissions Committee reviews the completed Admission Application and all supporting documentation. It is important that all information is complete and submitted for a timely review. If application is approved, the referring program will be contacted to coordinate an admission date.
- On admittance day, forms requiring signature must be signed in the presence of the Intake Coordinator.  
[Listing of Additional Forms Requiring Signature upon Admissions \(PDF\)](#)

## Updating a Patient's Information

1. To update an individual patient's information click Update Application next to that person's name and go through their application to adjust any fields as needed. The most important part of this stage is that after completing the changes needed, you must scroll down to the bottom to and press the UPDATE button. This ensures that the changes you just made are saved into the database.

[Back to Main Page](#) | [Logout](#)

**Here is your whole application - please review for completion.**  
 If you would like to print this just right click on your mouse for a menu and select "Print."

ApplicationID	Confirmation Number	Application Origin
1	HQ2BHQUC	Site99
Application Status (Assigned by Desert Sage)	Date Entered	Entered By
	8/29/2019	TestUser

### Patient Information

<b>First Name*</b>	<b>Middle Name</b>	<b>Last Name*</b>	<b>Other Name/Aliases</b>	<b>Suffix</b>
Steven	John	Snead	Steve	Jr
<b>Gender*</b>	<b>Marital Status</b>	<b>Primary Language</b>		
<input type="radio"/> Female <input checked="" type="radio"/> Male <input type="radio"/> Non-conforming <input type="radio"/> Refused	Single/Never Married			
<b>Race (select all that apply)</b>	<b>Ethnicity</b>	<b>Religious Preference (Select all that apply)</b>		
American Indian or Alaska Native	Not Hispanic/Latino	None		

### Birth Information:

<b>DOB*</b>	<b>City Birth Place</b>	<b>Birth Place State</b>	<b>Born outside of US</b>
07/16/2006	New York	New York	<input type="checkbox"/>

**Tribal Affiliation(s):**

<b>Tribal Affiliation Primary</b>	<b>Tribal Affiliation Secondary</b>	<b>Tribal Affiliation Tertiary</b>
ZUNI TRIBE, NM		

Tribal Affiliation Other (if NOT on list or more details is needed)

### Medical Insurance Information

<b>Medicaid/Medi-Cal</b>	<b>Policy Number</b>	<b>Effective Date</b>	
<input checked="" type="radio"/> Yes <input type="radio"/> No	kkidh	08/21/2019	
<b>Other Health Insurance</b>	<b>Name of Insurance</b>	<b>Policy Number</b>	<b>Other Effective Date</b>
<input checked="" type="radio"/> Yes <input type="radio"/> No	Aetna	5K3K3K3K	08/07/2010

2. After pressing UPDATE the computer will redirect you to a final screen that says in green letters that the "data was updated successfully". This is your confirmation that you did indeed press the update button. You will only need to click the update button once in order to register your changes. After this you can click back to main page or logout using the buttons in the upper left corner.

## Downloading Client Data into Excel

In order to protect client data and not breach confidentiality, **ensure that you are on a secure workspace before downloading any patient data.**

1. To download the entire patient list into an Excel spreadsheet onto your computer you must login and press the search button with all the format fields blank.
2. Doing this will take you to a full patient list where you can click “Download Data” on the top left corner of the search box.

	PT LAST NAME	PT FIRST NAME	APPLICATION STATUS (ASSIGNED BY YRTC)	APPLICATION ID	DOB
<a href="#">Update Application</a>	Samad	Steven	1	23	7/16/2006
<a href="#">Update Application</a>	Brown	Sue	2	23	8/29/2009
<a href="#">Update Application</a>	Doe	Jane	23	23	11/1/2010
<a href="#">Update Application</a>	Joe	Deborah	3	23	10/13/2009
<a href="#">Update Application</a>	Tom	Anne	4	23	8/29/2007

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[Listing of Additional Forms Requiring Signature upon Admissions \(PDF\)](#)

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3. If you would like to download a specific individual then go back to the search screen, enter in the individual’s first and last name and press search.
4. Then you can download the data for that patient the same as you would for the entire list.
5. The downloaded data will appear in the bottom bar of your screen saying, “Application Search...”. From here you double click on the box to open it up into an Excel sheet.
6. Once in Excel there are many different things that you can do with the data including creating graphs, charts, and equations. If you have further questions about this process, please reach out to AASTEC staff at [aastec@aaihb.org](mailto:aastec@aaihb.org) and we can provide assistance.

Back to Main Page | Logout

Start a NEW Application



Update or Complete an Application Started by Your Clinic

Download Data

	PT LAST NAME	PT FIRST NAME	APPLICATION STATUS (ASSIGNED BY YR/TC)	APPLICATION ID	DOB	
<a href="#">Update Application</a>	Doe	Jane		23	23	11/1/2019

Records 1-1 of 1

### About the View Process

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- [Listing of Additional Forms Requiring Signature upon Admissions \(PDF\)](#)

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Back to Main Page | Logout



Application Search...aml ^

Show all X

## Using the Desert Sage Platform: Desert Sage Administration

Staff at Desert Sage Youth Regional Treatment Center have the widest access to portal information as they can view and update all applications as well as assign a review status to applications. Selected staff will have full administrative access to the application portal which includes the modification of user information. With this full access, staff can find and view applications, assign a review status to an application, download uploaded documents, assign a clinic site to an application, and develop and approve clinic staff logins. To access the Desert Sage staff page, from the homepage click on **PROFESSIONALS** then **DESERT SAGE STAFF ONLY**.



## Getting Started: Logging-In and HIPAA Certification

To get started, Desert Sage staff will be provided with a username and password by staff at the Albuquerque Area Southwest Tribal Epidemiology Center (AASTEC). The username will likely consist of the first initial of the user's first name and the user's last name. For example, if a user's name is Dolly Parton, their username will likely be dparton. Once AASTEC provides Desert Sage staff with their login information, they are able to change their password by entering their username and clicking "Forgot Password." We recommend that all users complete this step in order to keep each person's login information confidential. Passwords should consist of numbers, letters, and special characters. They should contain more than eight characters to maintain password security.

Once a user has their username and updated password, they will be able to login. At the time of first login, they will be prompted to certify HIPAA compliancy through a confidentiality agreement.

**Confidentiality Agreement:** The first time you login, a message will pop up saying "If you have not yet agreed to the Confidentiality Agreement, please login [Here](#)." You will need to click on the word "Here"

and reenter your login information. You will be redirected to a page to read. If you would like to continue, enter your first and last names and check the box showing your agreement, then click the UPDATE button. You will be redirected to the login page and can now login with your HIPAA credentials accepted to begin or update an application. This certification will be saved to your login so you will not have to fill it out again.

Referring clinic staff will also be required to complete this step, but parents/guardians will not.

**CONFIDENTIALITY AGREEMENT**

**AASTEC CONFIDENTIALITY POLICY**  
Protecting the confidentiality of the Tribes and community members that we serve is of utmost importance to AASTEC (Albuquerque Area Southwest Tribal Epidemiology Center). AASTEC's Southwest Indigenous Database (SID) confidentiality policy encompasses the following, whereas "parties" refers to both AASTEC and the Tribal Entity utilizing SID.

- Both parties agree not to use, nor disclose to any unauthorized person, any confidential information relating to or received from the Southwest Indigenous Database for any reason unless authorized by the Tribal Entity who owns the data, or as required by law. Both parties understand that this applies both during and after employment/voluntary service.
- Both parties agree not use or disclose any personal data acquired during work for any purpose that is or may be incompatible with the purposes of that work.
- Both parties understand that they are required to keep all confidential and personal data securely; and agree to follow all relevant local procedures in doing so.
- Both parties shall limit disclosure of SID data within its own organization to its directors, officers, partners, members and/or employees having a need to know and shall not disclose SID data to any third party (whether an individual, corporation, or other entity) without prior written consent.
- Confidentiality is governed by federal law (42 U.S.C. § 290dd-2) and regulations (42 CFR Part 2) which outline the limits of disclosure for patient information and legal access to patient information.

First Name\*

Last Name\*

HIPAA Agreement\*  Yes I have read and agree to this Confidentiality Agreement.

[UPDATE](#)

Please close this window if you do not agree to the terms. Agreement will take you to the Login screen.

For those logging in through Desert Sage, open the main page and click once on the Desert Sage staff only button. From here it will take you to a new screen with four options.

1. **Start a New Application** – click on the button on the left side of the screen to begin a new application.
2. **Search to Update/Review an Application** – after searching for a client using filters or a blank search, click on update application to the left side of the name.
3. **Create a New Staff/Clinic Account** – staff from referring clinics are required to go through Desert Sage in order to create a username and password.
4. **Modify Staff/Clinic Accounts** – where changes can be made to existing staff accounts including name change or deletion.

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[Logout](#)

[Start a NEW Application](#)

To Update or Review ALL Applications and check for appropriate documentation

[SEARCH](#)

Administration ONLY

[Create a New Staff/Clinic Account](#)

To modify or remove a person's access to this database

[Modify Staff/Clinic Accounts](#)

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## Start New Application

Please see the information beginning on **Page 6** for this process.

## Search to Update/Review Applications

1. To search for a specific application, enter some basic information into the filter fields. To view all submitted applications, click the search bar without entering in any information into the filter fields.

The screenshot displays a web application interface for managing applications. The main area shows a table of applications with columns for PT LAST NAME, PT FIRST NAME, APPLICATION STATUS, APPLICATION ID, DOB, CURRENT CLINIC SITE, and ORIGIN SITE. The table is filtered by last name 'Aquarius' and first name 'Paul'. Below the table, there are buttons for 'Update Application' and 'Add New Clinic Site'. The bottom left corner has an 'Administration ONLY' section with buttons for 'Create a New Staff/Clinic Account' and 'Modify Staff/Clinic Accounts'.

PT LAST NAME	PT FIRST NAME	APPLICATION STATUS (ASSIGNED BY YRTC)	APPLICATION ID	DOB	CURRENT CLINIC SITE	ORIGIN SITE			
Aquarius									
Paul									
		<a href="#">Update Application</a>	Missing Documents please complete	9	9	9/4/2007	Site99	<a href="#">Add New Clinic Site</a>	Site4DS
		<a href="#">Update Application</a>	Missing Documents please complete	9	9	9/4/2007	Site85	<a href="#">Add New Clinic Site</a>	Site4DS
		<a href="#">Update Application</a>	Missing Documents please complete	9	9	9/4/2007	Site85	<a href="#">Add New Clinic Site</a>	Site4DS
		<a href="#">Update Application</a>	Missing Documents please complete	9	9	9/4/2007	Site80	<a href="#">Add New Clinic Site</a>	Site4DS
Brown									
Sue									
		<a href="#">Update Application</a>		9	9	8/29/2009	Site80	<a href="#">Add New Clinic Site</a>	Site99

Records 1-5 of 27

Page 1 of 6

Administration ONLY

Create a New Staff/Clinic Account

To modify or remove a person's access to this database

Modify Staff/Clinic Accounts

2. If you search the entire client list without entering filters, applications will be organized by the applicant name. This page tracks the current clinic assignment as well as the location of the application origin (i.e., parent/guardian, clinic site, Desert Sage). As the screenshot shows, applications are organized alphabetically by last name (the blue bar reading "Aquarius") then first name (the grey bar reading "Paul"). Since multiple applications can be submitted for the same client, all of Paul's applications will be listed here.
3. At any point after this process you will be able to start a new application by clicking either the "create a new staff/clinic account" or "modify staff/clinic account" button over the image in the bottom left-hand corner of the screen.
4. If you would like to only search for one individual's history, then you would type in that individual's name in the field box on the search page and then press search.

## Assigning a Review Status

All Desert Sage staff are able to access and update the application status on applications by clicking Update Application next to a client's name and assigning a status using the dropdown menu. Once an application status is assigned, the status will be an additional search filter for applications. Also, individuals and clinics that submitted the applications will be able to see their application status, so the status can be used to alert applicants if additional information is needed in order for their application to be completed.

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**Here is your whole application - please review for completion.**  
**If you would like to print this just right click on your mouse for a menu and select "Print."**

ApplicationID	Confirmation Number	Application Origin	DateEntered	EnteredBy	EnterByEmail
9	MiEA85iQ	SiteDS	9/10/2019	TestAdmin	testad@aahb.org

**Application Status (Assigned by YRTC)**

Missing Documents please complete 
  
 Please Select from List
 

- Accepted
- Declined
- Missing Documents please complete
- Needs to be reviewed by D.S. Youth Wellness Center
- Sent to Admissions Committee

**First Name** 
**Middle Name** 
**Last Name\*** 
**Other Name/Aliases** 
**Suffix**

**Gender** 
**Marital Status** 
**Primary Language**

**Race** 
**Ethnicity** 
**Religious Preference**

**Birth Information:**

**DOB\*** 
**BirthPlaceCity** 
**BirthPlaceState**

## Downloading Data into Excel

1. To download the entire patient list into an Excel spreadsheet onto your computer you must login and press the search button with all the format fields blank.
2. Doing this will take you to a full patient list where you can click “Download Data” on the top left corner.
3. If you would like to download a specific individual then go back to the search screen, enter in the individual’s first and last name and press search. Then you can download the data for that patient the same as you would for the entire list.
4. The downloaded data will appear in the bottom bar of your screen saying, “Application Search...”. From here you double click on the box to open it up into an Excel sheet.

Download Data	PT LAST NAME	PT FIRST NAME	APPLICATION STATUS (ASSIGNED BY YRTC)	APPLICATION ID	DOB
<a href="#">Update Application</a>	Doe	Jane	23	23	11/1/2019

Records 1-1 of 1

### About the View Process

There are two steps in the referral/admissions process:  
**Step 1 = Admissions Process**

For best consideration, supporting documents must be included with the submission of the Admission Applications  
[Listing of Support Documents \(PDF\)](#)

### Step 2 = Approval Process

- The Admissions Committee reviews the completed Admission Application and all supporting documentation. It is important that all information is complete and submitted for a timely review. If application is approved, the referring program will be contacted to coordinate an admission date.
- On admittance day, forms requiring signature must be signed in the presence of the Intake Coordinator.  
[Listing of Additional Forms Requiring Signature upon Admissions \(PDF\)](#)

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Application Search...aml ^

Show all x

5. Once in Excel there are many different things that you can do with the data that include creating graphs, charts, and equations. If you have further questions about this process, please reach out to AASTEC staff at [aastec@aaihb.org](mailto:aastec@aaihb.org) for assistance.

## Create a New Staff/Clinic Account

In order to avoid potential confusion, this level of access is restricted to selected administrative individuals at Desert Sage. Those individuals will be responsible for providing staff at referring clinics with a username and password so that they can enter client information. They will also be able to assign labels to referring clinics that can be used for searching and tracking purposes. If individuals who do not have this access attempt to access the buttons in the Administration Only box, they will be redirected to the page for staff.

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Start a NEW Application

To Update or Review ALL Applications and check for appropriate documentation

Administration ONLY

Create a New Staff/Clinic Account

To modify or remove a person's access to this database

Modify Staff/Clinic Accounts

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1. To create a new staff account, click on the Create a New Staff/Clinic Account button on the Desert Sage page.

Click here to add a new clinic site

Type in Clinic Site or Select from List

\* All fields are required to create an account.

First & Last Name \*

(All user names and emails must be unique)

User name \*

Email (may only be used once) \* Confirm Email \*

Your password must be at least 8 characters, including at least 1 number and both lower and upper case letters.

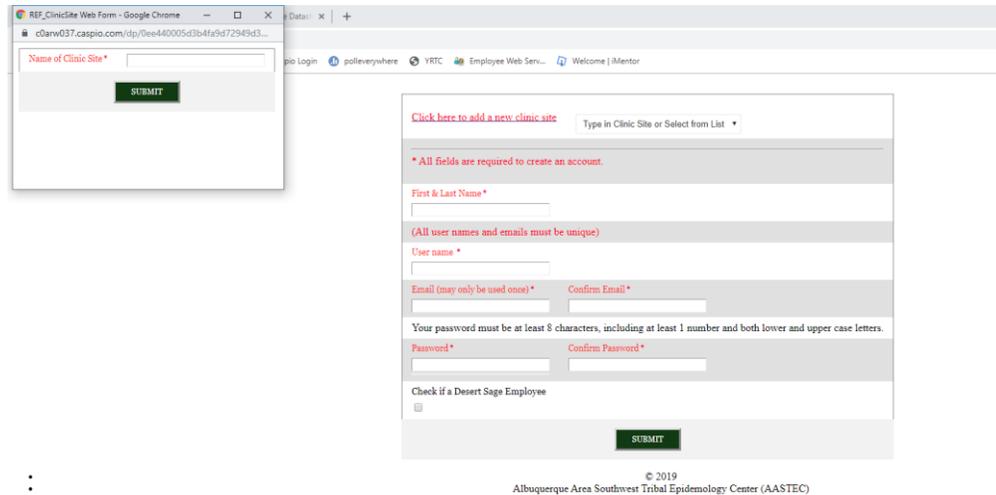
Password \* Confirm Password \*

Check if a Desert Sage Employee

SUBMIT

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- Each account must be assigned to a clinic site from the dropdown menu. If the desired site is not currently listed in the menu, it can be added by clicking “Click here to add a new clinic site.” A window will pop up where you can type in the desired label for the site and click SUBMIT.



- In order to see the new clinic in the dropdown list, you will need to refresh the page. This will add the new site to the dropdown list and will also erase any other information entered on the form, so we recommend that you do not begin filling out the rest of the form until the correct clinic site is selected.
- Once the clinic site is assigned, enter the staff member’s first and last name and email address (these should be provided to you by the staff), and create a username and password for them.
- If the individual is staff at Desert Sage, click the box at the bottom of the form. This gives the individual access to all applications and the ability to select a review status. If the individual is from a referring clinic, **do not check the box**. This will limit the individual to only seeing the applications submitted from their clinic site which is necessary for privacy purposes.

## Modify or Remove Staff/Clinic Accounts

1. To modify a pre-existing staff/clinic account, click “Modify a Staff/Clinic Account” on the Desert Sage page.
2. From here, search for a particular user by entering in at least one search term, or click search without any filters to bring up the entire list.

The search form contains the following fields and options:

- Name:** Text input field
- Email:** Text input field
- User name:** Text input field
- Active Status:** Radio buttons for Yes, No, and Any
- Clinic Site:** Dropdown menu with the text "Please Select Clinic Site"
- SEARCH:** A button to execute the search

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3. To modify any user information, find the user on the screen, press “edit” and change any of the available information.
4. The Clinic Site is an important field in this table. Referring Clinic Staff users are restricted to seeing applications labeled with their particular clinic, so once the clinic site on an application is changed, that will affect who is able to view that application. In order for a clinic to access an application submitted by a Parent/Guardian, the clinic site will need to be switched to the referring clinic’s label. Desert Sage staff are able to see applications from all clinics.
5. If you would like to temporarily disable a user, simply uncheck the check box in the column that reads “Active Status” and their status will become inactive. If you would like to delete the individual from the system, simply press “delete.” However, this is a permanent action and if you were to ever need that user in the future a new account would have to be created. We recommend removing the active status of the user rather than deleting them from the system.

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Search Again

USER NAME	EMAIL	NAME ▲	ACTIVE STATUS	HIPAA	HIPAA FIRST NAME	HIPAA LAST NAME	HIPAA DATE	CLINIC SITE	ALLSITE ADMIN	SITE DATA ENTRY	DESERT SAGE ADMIN		
agarcia	agarcia@uall.org	Al Garcia	Yes	Yes			4/9/2009	Site01	<a href="#">Click here to add a new clinic site</a>	No	Yes	Yes	<a href="#">Edit</a> <a href="#">Delete</a>
amuchna	amuchna@saibh.org	Amy Muchna	Yes	Yes	Amy	Muchna	11/5/2008	Site01	<a href="#">Click here to add a new clinic site</a>	No	No	No	<a href="#">Edit</a> <a href="#">Delete</a>
cgrens	Carrie.Grens@lhs.gov	Carrie Grens	Yes	Yes			12/7/2008	SiteDS	<a href="#">Click here to add a new clinic site</a>	Yes	Yes	No	<a href="#">Edit</a> <a href="#">Delete</a>
cpfent	cpfent@indianhealth.com	Cheryl Pfent	Yes	Yes			4/9/2009	Site01	<a href="#">Click here to add a new clinic site</a>	No	Yes	No	<a href="#">Edit</a> <a href="#">Delete</a>
ckamatani	ckamatani@uall.org	Chris Kamatani	Yes	Yes			4/9/2009	Site01	<a href="#">Click here to add a new clinic site</a>	No	Yes	No	<a href="#">Edit</a> <a href="#">Delete</a>
cbrennan	Christine.Brennan@lhs.gov	Christine Brennan	Yes	Yes			12/7/2008	SiteDS	<a href="#">Click here to add a new clinic site</a>	Yes	Yes	No	<a href="#">Edit</a> <a href="#">Delete</a>
estretter	Emily.Stretter@lhs.gov	Emily Stretter	Yes	Yes			12/7/2008	SiteDS	<a href="#">Click here to add a new clinic site</a>	Yes	Yes	No	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="text" value="name"/>	<input type="text" value="aaotec@saibh.org"/>	<input type="text" value="First Name"/>	<input checked="" type="checkbox"/>	No			8/16/2009	Site100	<a href="#">Click here to add a new clinic site</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">UPDATE</a> <a href="#">CANCEL</a>
gmcliskey	garvin.mcliskey@saahc.org	Garvin McCliskey	Yes	Yes			4/9/2009	Site01	<a href="#">Click here to add a new clinic site</a>	No	Yes	No	<a href="#">Edit</a> <a href="#">Delete</a>
hmcMichael	hmcMichael@rsbchi.org	Herbert McMichael	Yes	Yes			4/9/2009	Site01	<a href="#">Click here to add a new clinic site</a>	No	Yes	No	<a href="#">Edit</a> <a href="#">Delete</a>
JudyEspinoza	Jespinoza@saibh.org	Judy Espinoza	Yes	Yes	Judy	Espinoza	7/30/2009	SiteTest	<a href="#">Click here to add a new clinic site</a>	No	Yes	No	<a href="#">Edit</a> <a href="#">Delete</a>
lcmasser	lcmasser@indianhealth.com	Karen Yarrisa-Masser	Yes	Yes			4/6/2009	Site01	<a href="#">Click here to add a new clinic site</a>	No	Yes	No	<a href="#">Edit</a> <a href="#">Delete</a>

## Information and Technical Assistance

This application portal has been developed by the Albuquerque Area Southwest Tribal Epidemiology Center (AASTEC), and AASTEC staff are available to assist anyone utilizing the portal. If you have questions about the portal or encounter any issues while using it, please reach out to the “YRTC technical assistance team” at [aastec@aaihb.org](mailto:aastec@aaihb.org) and we will work with you to address your concerns.