



COUNTY OF SAN DIEGO
BEHAVIORAL HEALTH SERVICES

LOCUS Tool

Level of Care Utilization System Tool

SmartCare EHR Navigation

Jill Michalski

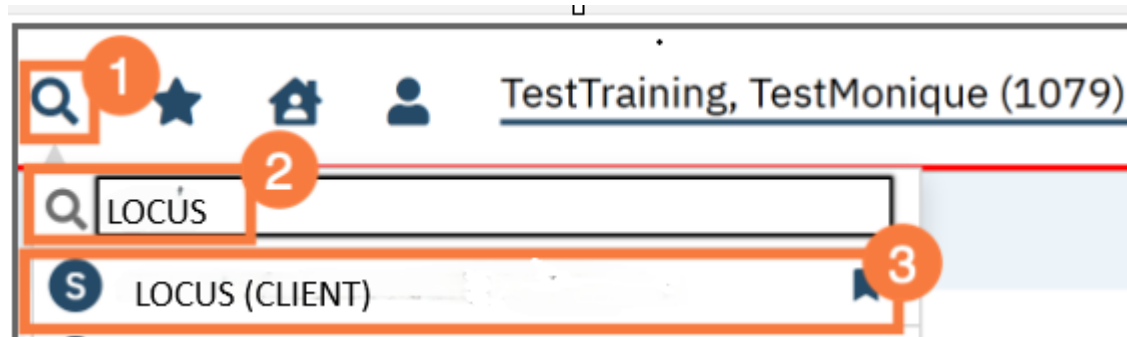
EHR Project Team Clinical Lead

BHS Health Plan Operations

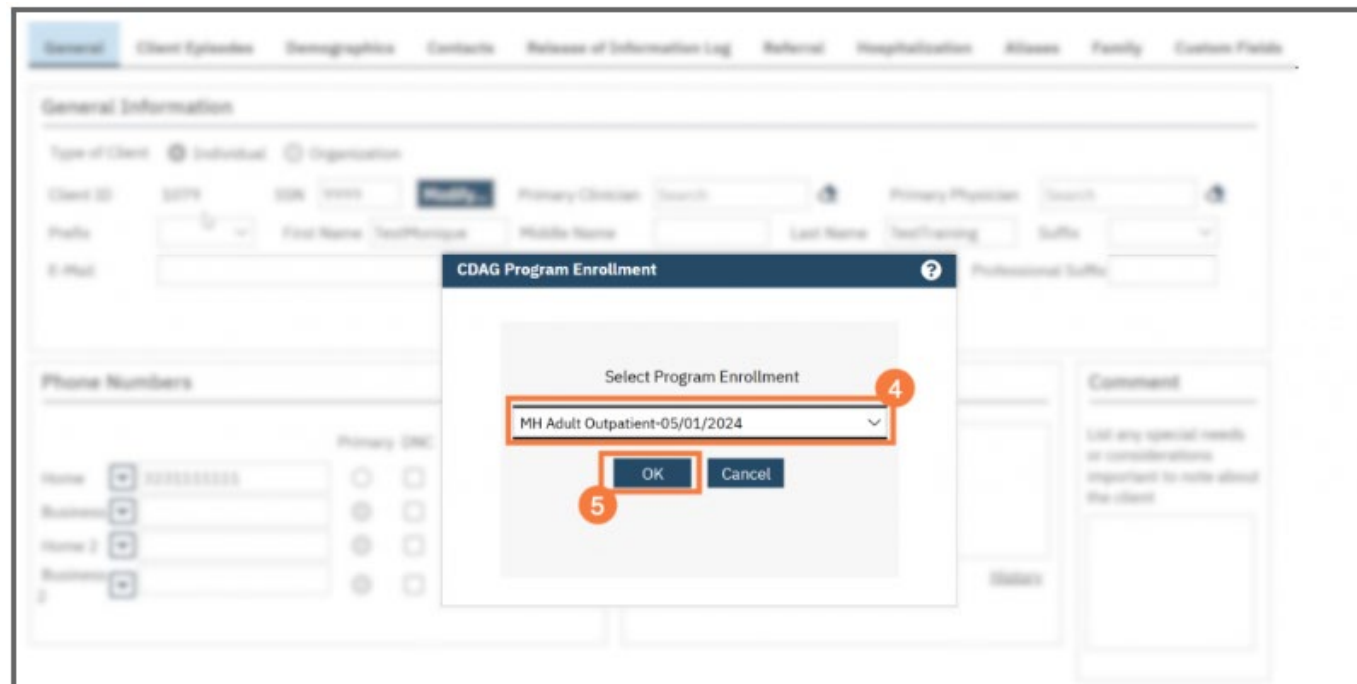
SmartCare Navigation



- You must first have the client open, then **click the Search icon.**
- Type **LOCUS** into the search bar.
- Click to select **LOCUS(Client).**



- In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- **Click OK** to continue

A screenshot of a software interface showing a "CDAG Program Enrollment" pop-up window. The background window has tabs for "General", "Client Episodes", "Demographics", "Contacts", "Release of Information Log", "Referral", "Hospitalization", "Admission", "Family", and "Custom Fields". The "General Information" section is active, showing fields for "Type of Client" (Individual/Organisation), "Client ID", "DOB", "Gender", "Primary Clinician", "Primary Physician", "Profile", "First Name", "Last Name", "Suffix", "E-Mail", and "Phone Numbers". The "CDAG Program Enrollment" pop-up window is centered, titled "Select Program Enrollment", and contains a dropdown menu with the selected option "MH Adult Outpatient-05/01/2024". Below the dropdown are "OK" and "Cancel" buttons. Red circles with numbers 4 and 5 highlight the dropdown and the OK button, respectively.

- The LOCUS Tool will open. **Complete the document.**

LOCUS

Effective 07/23/2026 Status New Author Michalski, Jill

Risk of Harm Functional Status Medical, Addictive and Psychiatric Co-Morbidity Recovery Environment (Level of Stress) Recovery Environment (Level of Support) Treatment and Recovery History Engagement and Recovery Status Summary

Risk of Harm

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This dimension of the assessment considers a person's potential to cause significant harm to self or others. While this may most frequently be due to suicidal or homicidal thoughts or intentions, in many cases unintentional harm may result from misinterpretations of reality, from inability to adequately care for oneself, or from altered states of consciousness due to use of intoxicating substances in an uncontrolled manner. For the purposes of evaluation in this parameter, deficits in ability to care for oneself are considered only in the context of their potential to cause harm. Likewise, only behaviors associated with substance use are used to rate risk of harm, not the substance use itself. In addition to direct evidence of potentially dangerous behavior from interview and observation, other factors may be considered in determining the likelihood of such behavior such as; past history of dangerous behaviors, inability to contract for safety (while contracting for safety does not guarantee it, the inability to do so increases concern), and availability of means. When considering historical information, recent patterns of behavior should take precedence over patterns reported from the remote past. Risk of harm may be rated according to the following criteria:

1 – Minimal Risk of Harm

☐ No indication of suicidal or homicidal thoughts or impulses, and no history of suicidal or homicidal ideation, and no indication of significant distress.

☐ Clear ability to care for self now and in the past.

2 – Low Risk of Harm

☐ No current suicidal or homicidal ideation, plan, intentions or severe distress, but may have had transient or passive thoughts recently or in the past.

☐ Occasional substance use without significant episodes of potentially harmful behaviors.

☐ Periods in the past of self-neglect without current evidence of such behavior.

3 – Moderate Risk of Harm

☐ Significant current suicidal or homicidal ideation without intent or conscious plan and without past history.

☐ No active suicidal/homicidal ideation, but extreme distress and/or a history of suicidal/homicidal behavior exists.

☐ History of chronic impulsive suicidal/homicidal behavior or threats, but current expressions do not represent significant change from usual behavior.

☐ Binge or excessive use of substances resulted in potentially harmful behaviors in the past, but there have been no recent episodes.

☐ Some evidence of self-neglect and/or decrease in ability to care for oneself in current environment.

- Click Sign to complete and generate the document

LOCUS

Effective 07/23/2026 Status In Progress Author Michalski, Jill

Sign

Risk of Harm Functional Status Medical, Addictive and Psychiatric Co-Morbidity Recovery Environment (Level of Stress)

Recovery Environment (Level of Support) Treatment and Recovery History Engagement and Recovery Status Summary

Summary

LOCUS Result	4
LOCUS Result Description	Medically Monitored Non-Residential Services
Risk of Harm	3
Functional Status	3
Medical, Addictive and Psychiatric Co-Morbidity	2
Recovery Environment (Level of Stress)	4
Recovery Environment (Level of Support)	4
Treatment and Recovery History	3
Engagement and Recovery	3
Current Level of Care	None
LOCUS Recommended Disposition	Level Four - Medically Monitored Non-Residential Services
Actual Disposition	3 - High Intensity Community Based Services
Reason for Variance	
Program/Referred to	Level Four - Assertive Community Treatment (ACT)
Evaluation Notes	

- PDF will be generated.

LOCUS

Effective 07/23/2026 Status Signed Author Michalski, Jill

Document

Client ID: 200388753 Page 1 of 2

LOCUS			
Client Information			
Client Name:		Client ID:	
DOB:	12/09/1969	Effective Date:	07/23/2026
Program:			
LOCUS Results	4	LOCUS Total Score	22
Current Level of Care	None		
LOCUS Recommended Disposition	Level Four - Medically Monitored Non-Residential Services		
Actual Disposition	3 - High Intensity Community Based Services		
Reason for Variance			
Program/Referred to	Level Four - Assertive Community Treatment (ACT)		
Evaluation Notes			
Risk of Harm		Dimension Score 3	
3 - Moderate Risk of Harm			
History of chronic impulsive suicidal/homicidal behavior or threats, but current expressions do not represent significant change from usual behavior.			
Functional Status		Dimension Score 3	
3 - Moderate Impairment			
Significant deterioration in ability to fulfill responsibilities and obligations to job, school, self, or significant others and these may be avoided or neglected on some occasions.			