Initial Assessment Policy and Procedures

Policy

Transformations will initiate same day contact with a client/referral source who has initiated a request for information or treatment.

Transformations will offer an initial in-home evaluation to be completed within the first 48 hours of the request for services.

If the client requests that the initial evaluation be delayed beyond 48 hours, Transformations will seek to perform the evaluation within 7 days of the first request for services.

Failure to provide the initial evaluation within 7 days will be documented and evaluated for quality care improvement. The referral source and the insurance company will both be notified of the failed attempt to provide the service.

Procedure

1. The intake coordinator will receive and review all incoming referrals whether through the website, phone, fax, or walk-in.
2. The intake coordinator will acknowledge the referral immediately- the day of the referral
3. The Intake coordinator will contact the assessment team (any willing BHP) with client information
4. The assessment team members will reply immediately with their availability to accept the referral.
5. Intake Coordinator will verify the identity of the assessment team member who will take the referral.
6. The assessor will contact the client (same day)and arrange the appointment time (48 hours)
7. Failure to provide the initial evaluation within 7 days will be documented and evaluated for quality care improvement. The assessor will notify the intake coordinator.
8. The intake coordinator will contact both the referral source and the insurance company of the failed attempt or delay in providing the service.
9. The assessor will verify insurance coverage and any needed authorization prior to the service. We recommend you use the insurance company website.
10. When the assessor meets with the client the assessor will:
	1. Orient the client to our program and services
	2. Assist the client in completing the enrollment packet (you may email the packet to the client prior to your session)
	3. Evaluate the client, diagnose, and document the findings
	4. Make recommendations to the client for treatment
	5. Explain freedom of choice
	6. Facilitate the selection of providers for referrals for care
		1. Contact the providers selected with client information and request for services
		2. This should be done through the Transformations website
		3. Referrals made to providers and services outside the agency must be documented and release forms obtained
		4. The assessor will document all contacts on the Contact Log
		5. The intake coordinator will follow up with the referred to provider accepting the referral and family to be sure the services are implemented.
11. The assessor will give the completed evaluation/enrollment and other forms to the intake coordinator
12. The assessor will write up a client contact note documenting the diagnostic evaluation
13. The assessor will write up a client contact note documenting the collateral session
14. The provider will complete a billing form to accompany the documentation.
15. The Assessor will submit all documentation to the office/intake coordinator within 48 hours of the service provided in compliance with state and federal regulations.