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| Referrals | Diagnostic Evaluation | @ Home Office | 2nd Session |  |
| * Referrals are sent from Janna Winsted, Intake Coordinator and are sent to your Transformations email for review. * If you want to accept the case reply to the email as quickly as possible. First come, first serve. * Document case acceptance within 48 hours in a **blank note** in MC+. Document all attempts to contact the potential client in a **blank note**. * **Verify Insurance** at kymmis.com (KY Health Net). Renee will send out a monthly email detailing how to verify insurance. * Go to Transformations Library and click on #3 “Enrollment of Client” Services. * Click on “BHP Enrollment Packet”. Add client info into the header and print out. | * Go to the Library and click on “#4 Evaluation Services”. Choose the appropriate Biopsychosocial (Adults or Children & Adolescents) * Save this document template to your computer. Go to the home, gather information and complete the document. * The billing code for this session is 90791 diagnostic evaluation and H0032 Mental Health Service Plan Development (aka Treatment Plan Development). * Enter the bill claim and a blank note documenting you completed a diagnostic evaluation and developed a treatment plan. This must be completed within 48hrs of the start of the session. | * Finalize the Biopsychosocial and COPY and PASTE into a **blank note**. * Complete CAFAS assessment (ages 5-18) if you did not do this at the home with the client . * If you have enough information then finalize the treatment plan and COPY and PASTE into a **blank note**. * We recommend using measurable problem and goals by identifying frequency, intensity and/or duration of symptoms.      * Print out the treatment plan and take a copy to your next session. | Psychotherapy/Family therapy   * Give a copy of the TX plan to the   parent/guardian.   * Review the TX plan with parent/ guardian. * Make changes if needed based on the response of the parent/ guardian. * On the treatment plan blank note add an addendum that you gave a **copy**, **reviewed** and got a **response** to the treatment plan from the parent/guardian and/or client. This is a STATE regulation! | *Helpful Hint:*  At ***transformationsllc.net*** aka “the library” #6 BHP services lists all the information from Opening to Closing a case.  *Helpful Hint:*  ***Sign and Lock*** all progress notes within 48 hours of the start of the session. For example, if you start a session at 1:00pm Monday, then the note must be signed and locked PRIOR to 1:00pm Wednesday.  *Helpful Hint:*  Learn the ***copy and paste*** keys on your computer. Copy and paste the biospychosocial and treatment plan into a blank note. This is a time saver.  *Helpful Hint:*  All **treatment plans** must be updated every 5 months and the **Biopsychosocial** every 6 months. You can update these items together at the same session. |

MC+ = My Clients Plus BHP = Behavioral Health Professional CAFAS = Child & Adolescent Functioning Assessment Scale

ECSII = Early Childhood Service Intensity Instrument (ages 0-5) CASII = Child and Adolescent Service Intensity Instrument (5-18)

LOCUS = Level of Care Utilization of Services (19+)