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| **POLICY TITLE:**  | **Intake Procedure** - CP01 |
| **APPLIES TO:**  | All Clinical Staff at Caregiver Grove Behavioral Health  |
| **EFFECTIVE DATE:**  | August 19, 2024 |
| **ANNUAL** **REVIEW DATE:**   | January 1 (each calendar year)Reviewed: August 7, 2024 |
| **PURPOSE:**  | This policy provides an official intake/admission procedure for new and returning clients.   |
| **DEFINITION:**  | Intake: The entry of a new or returning client to CGBH services.   |
| **POLICY**  | 1. Complete all Intake / Admission paperwork.
2. This must be done prior to the client beginning treatment.
3. Be sure to obtain the client’s correct contact information and insurance information. Verify that insurance is accepted upon scheduling intake.
4. Schedule the client for an assessment. Assessments must be completed by LSW, LPC, LISW or LPCC.

 1. Confirm that all intake paperwork has been completed. These forms are all available under Client Orientation Checklist Forms unless otherwise indicated. These forms include:
2. Client Orientation Checklist
3. Consent for Treatment
4. HIPAA Notice
5. Notice of Informed Consent, HIPAA, and Client Right Document
6. Confidentiality Policy
7. Client Services Agreement
8. Client Rules and Expectation
9. Fee Schedule
10. Service Fee Agreement
11. Notice of Patient Financial Responsibility
12. Safety Contract
13. Drug and Alcohol Use Policy
14. Universal Precautions for Infection Control
15. Transportation Release and Waiver of Liability
16. Written Summary of Federal Regulation: Confidentiality of Alcohol & other Drug Abuse Client Record (42 C.F.R)
17. Right to Refuse or Withdraw from Treatment
18. Group Confidentiality
19. Consent to Participant in Telehealth Treatment
20. Suicide Risk Assessment
21. Authorizations for Release (ROI): Releases of Information to Include– emergency contact, referral source, legal involvement, EAPs, etc. (Located under Custom Forms in INSYNC)
22. Client Satisfaction Survey (Located under Custom Forms in INSYNC)
23. ASAM Level of Care (Located under assessment tab and Custom Forms in INSYNC) for this with co-occuring diagnosis

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| **APPLICABLE STANDARDS:** |  |
| **EXCEPTIONS:**  |   |
| **APPROVERS:**  |  Tonya Tooson | Chief Operations Officer (COO)Leandra Oman | Manager, Clinical II |