NEW CASES

When you get the email from the Account Manager giving you a new case (whether you self-referred it or not), please make sure to reach out to the client…

within 48 hours

- This is not only the courteous thing to do,
- but you'll also cement a strong image in the client's mind that you are professional and responsible.

1. Please contact the client **within 48 hours** to make contact and schedule an appointment for the intake. You don't need to schedule within 48 hours, but you need to make contact. If the client is not there, leave a VM, text, email, etc. You don't need to let me know the scheduled time - that's between you and the client.

2. I suggest you have the client (and guardian) sign the Intake Paperwork before your appointment. That way, they can do it ahead of time. Otherwise, you can have them do it during the appointment. As a last resort, you can have them do it after the intake appointment (but then you're risking them forgetting about it).

The direct link to the intake packet that they need to sign is here: https://lukascounseling.org/intakepacket. You can email it to them, or even text them.

If this is your first case, or if you are not sure, or need to review how to do things, please consult the staff training page (https://lukascounseling.org/stafftraining1994) and/or ask us!

3. Complete the intake session with the client. You can access the biopsychosocial and CFARS/FARS here, scroll all the way to the bottom where it says Submit Documentation. You might want to bookmark that page.

If you are not licensed... The "LE" portion of the intake will be done by a licensed clinician (I cc/'d here). Please communicate with him/her after the first part of the intake is completed (e.g. after you complete the biopsychosocial and CFARS/FARS), so that he/she can do the Licensed Evaluation via telehealth. The LE must be done within 30 days, and you need this completed in order to complete the Master Treatment Plan. **Please remind the client that a short 8-10 min LE session will be done, and that the LE person will be calling/texting them to schedule it.**

When to Return the Referral

Try contacting the client **at least 4 times, over the next 14 days**. Still, if after that time, you hear nothing back, let me know, and I'll close it. You might also want to consider texting, emailing them (if those options are available), or contacting the referral source on the referral form, sometimes they might have another way to contact them.