THE FLOW OF DOCUMENTATION

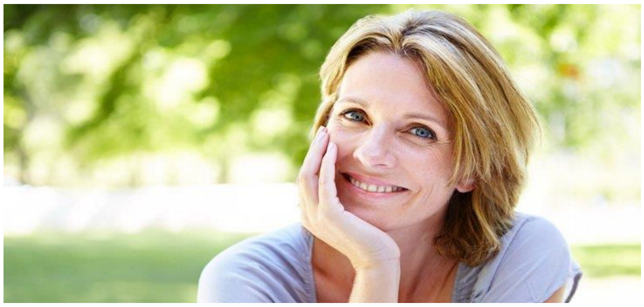
1

Call/Text/Email the new client within 48 hours to schedule the intake (the intake doesn't have to be scheduled within 48 hours, just reach out to them by then)

TIP – give the client the link to the intake consent paperwork they need to sign, that way they can do that BEFORE your intake session (they CAN do it during your intake, but you want to make sure it's done, so asking them beforehand is always good!)

TIP – for children, make sure that the legal guardian signs the paperwork (always ask if you are unsure who the legal guardian is – sometimes it is not obvious especially in difficult cases)

TIP – remind them WHO referred them for therapy. Sometimes clients are confused, so mention who referred them, and don't be afraid to reach out to the referral source if you have issues contacting them.



2

If you **ARE** licensed, complete the Assessment. (BIO + CFARS/FARS + Treatment Plan)

If you **ARE NOT** licensed, complete the Assessment NL. (BIO + CFARS/FARS). Then email the LE person (see assignment email), and let them know the Assessment was completed so that he/she can do the LE (short 8-10 min Zoom call with the Client – Please let the client know this needs to happen)

You MAY do weekly individual sessions while the LE is being completed (but not before the assessment is done!)

The LE person will email you when the LE is completed (and will tell you IF a change of diagnosis is required).

You can now complete the Master Treatment Plan and have the client sign the Treatment Plan signature page (please review the training website and all PDFs, since the treatment plan MUST be Medicaid-compliant!) – If your Treatment Plan is not done by **45 days** from the Assessment date, none of your work will be billable – Don't wait!

3

Continue your weekly sessions with the client. A treatment plan review must be done between 5 and 6 months (we say 5 so you don't wait until the last minute)