



**GENESEE COUNTY COMMUNITY
MENTAL HEALTH PIHP
PROCEDURE MANUAL**

Date Issued: 06-29-2009
Date Revised:

SUBJECT: Telephonic Access Screens		PAGE: 1
WRITTEN BY: J. Holiday		AUTHORIZED BY: T. Deeghan, Chief Operating Officer
Relates To Policy:	06-100-05	
Relates To Admin Directive:	n/a	
Relates To Human Resource Handbook:	n/a	

I. AFFECTED DEPARTMENTS:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Access | <input checked="" type="checkbox"/> Customer Services |
| <input checked="" type="checkbox"/> ACT | <input checked="" type="checkbox"/> MI Services - Adults |
| <input checked="" type="checkbox"/> Business Operations | <input checked="" type="checkbox"/> SUD Residential including Recovery Housing and SubAcute Detox |
| <input checked="" type="checkbox"/> Child and Family Services | <input checked="" type="checkbox"/> External Mental Health Providers |
| <input checked="" type="checkbox"/> Consult & Coord Services | |

II. PURPOSE

The purpose of conducting phone Access screens for children is to facilitate a convenient opportunity for timely child screening upon request and to decrease barriers to completing child screens.

The purpose of conducting phone Access screens for clients in SUD residential programs is to remove barriers related to transportation and the limitations inherent in residential staffing ratios, as well as to assure appropriate seamless linking and coordinating to additional mental health services upon discharge from residential care.

Access Coordinators and Access Support Staff shall refer to this procedure for guidance in providing consistent, timely, and efficient assistance to families requesting children’s services and to clients of residential substance abuse programs requesting mental health services.

III. PROCEDURE

A. Access Coordinator Availability:

1. Children

Of the current group of Access Coordinators, all are CAFAS-certified and three are child-credentialed. One Access Coordinator will be assigned to child screens full time and the other Access Coordinators will provide back-up. While the preference is for child screens to be conducted by child-credentialed Access Coordinators, the priority is for clients to be screened in a timely manner, ideally upon demand. Therefore, if a child-credentialed Access Coordinator is not available, the request will be routed to any available Access Coordinator in order to meet the needs of the client. The full-time child Access Coordinator will be stationed at the Child and Family Services (CFS) site Monday thru Friday from 8:00 a.m. to 5:00 p.m. If an appointment is necessary or desired by the family, phone screens will be

PROCEDURE MANUAL	06-15-09
SUBJECT: Telephonic Access Screens	PAGE: 2

scheduled on Mondays, Tuesdays, Thursdays, and Fridays beginning at 8:15 a.m. and the last appointment scheduled at 3:30 p.m. Later accommodations can be made upon request. Wednesdays will be reserved for screens for those who prefer a face-to-face meeting, with appointments starting at 8:15 a.m. and the last appointment scheduled at 3:30 p.m. Later accommodations can be made upon request. Two back-up Access Coordinators will be available for additional face-to-face appointments on Wednesdays if meeting the 14-day accommodation is in jeopardy. As a last resort, the Access Supervisor will act as back-up.

2. Clients in SUD Residential Programs

The request for a phone screen will be routed to any available Access Coordinator in order to meet the needs of the client. It is the goal to screen on demand. If necessary or desired, phone appointments will be scheduled as outlined under the paragraph above. Face-to-face screens may be scheduled at the Main Campus (420 W. 5th Avenue) Monday through Friday from 8:15 a.m. to 3:30 p.m. Later accommodations can be made upon request. As a last resort, the Access Supervisor will act as back-up.

B. Scheduling:

Access Support Staff should attempt to schedule back-to-back appointments starting at 8:15 a.m.; however, staff should accommodate client choice whenever possible. Access Support Staff should inform the Access Supervisor immediately in the event that any appointment is at risk of not being accommodated within 14 days from the initial request.

1. Initial Telephone Call to Access

Access Support Staff will gather all appropriate demographic information, including insurance information, and offer the choice of a telephone or face-to-face screen. Access Support Staff will inform the caller that the telephone screen takes approximately 45 minutes to 1 hour, and a face-to-face screen takes approximately 1 hour 15 minutes to 1½ hours.

If the parent/guardian or residential client chooses a telephone screen:

a. Children:

Access Support Staff will determine if it is possible for the screening to begin within 10 minutes by checking the scheduled appointments and observing staff phone activity. In addition to knowledge of the schedule, the Access Coordinators located at CFS will email Access Support Staff the start/stop times of all screens so they are aware of available times. If it is possible for a phone screen to occur within 10 minutes, an offer will be made to the parent/guardian. If not possible or if the parent/guardian chooses not to wait, an appointment will be made within 14 days for the phone screen if there is a call-back number; otherwise, a face-to-face appointment will be scheduled within 14 days. If it is an urgent situation, the screen will receive priority and be scheduled as soon as possible.

When a phone screen is scheduled, Access Support Staff will mail an appointment reminder letter no later than the next business day by 10:00 a.m. (unless the appointment is too soon to allow time for mailing) (see Attachment A).

PROCEDURE MANUAL	06-15-09
SUBJECT: Telephonic Access Screens	PAGE: 3

b. Clients in SUD Residential Programs:

Access Support Staff will determine if it is possible for the screening to begin within 10 minutes by checking the scheduled appointments and observing staff phone activity. This also includes Access staff stationed at CFS who may be available. If it is possible for a phone screen to occur within 10 minutes, an offer will be made to the client. If not possible, a phone screen or a face-to-face appointment will be made within seven (7) days. In either case, the screen will occur prior to the person's discharge from the residential program.

When a phone screen is scheduled, Access Support Staff will mail an appointment reminder letter to the residential program no later than the next business day by 10:00 a.m. (unless the appointment is too soon to allow time for mailing) (see Attachment A).

If the parent/guardian or residential client chooses a face-to-face screen:

a. Children:

An appointment for the screen will be made within fourteen (14) days, utilizing whenever possible the time slots on Wednesdays at CFS. If it is an urgent situation, the screen will receive priority and be scheduled as soon as possible. Access Staff will be clear about the location of the appointment. The parent/guardian will be asked to arrive 15 minutes prior to the appointment time to complete necessary paperwork. A packet prepared by Access Support Staff will be given to the family by the CFS Support Staff. An appointment confirmation letter will be mailed by the Access Support Staff no later than the next business day at 10:00 a.m.

b. Clients in SUD Residential Programs:

Prior to the client calling Access from the residential program, Residential program staff will complete and fax to the Access Department a signed Release of Information which will allow Access staff to contact the client while in residence at the program.

An appointment for the screen will be made within seven (7) days. If it is an urgent situation, the screen will receive priority and be scheduled as soon as possible.

The client should be asked to arrive 15 minutes prior to the appointment time to complete necessary paperwork. An appointment confirmation letter will be mailed by the Access Support Staff to the residential program no later than the next business day at 10:00 a.m.

2. Initial Telephone Call to CFS

CFS Staff will transfer the caller to Access and inform them of the nature of the call. Access Support Staff will implement step 1 above.

PROCEDURE MANUAL	06-15-09
SUBJECT: Telephonic Access Screens	PAGE: 4

3. Initial Unscheduled Walk-in at Access Main Campus (420 W. 5th Avenue)

a. Children:

As with any initial walk-in contact made with Access, Access Support Staff will immediately alert the Access Supervisor (or back-up management as needed) if the individual appears to have an urgent need for assistance. For routine, walk-in presentations to Access, Access Support Staff will gather all appropriate demographic information including, insurance information, and determine if there is availability for the screening to happen at that point in time by knowledge of scheduled appointments, phone activity light, and email of start/stop times of appointments at CFS. If there is availability for a face-to-face screen within 30 minutes, then make that offer to the parent/guardian. If a face-to-face screen is not possible within 30 minutes, Access Support Staff should inform them of the options to wait for the next available Access Coordinator (giving an estimated wait time) or to make an appointment. If the choice is made to make a future appointment, the individual will also be given the options of telephone or face-to-face screen. Access Support Staff will inform the parent/guardian that the telephone screen takes approximately 45 minutes to 1 hour and face-to-face approximately 1 hour 15 minutes to 1 ½ hours.

b. Clients in SUD Residential Programs:

This is not recommended as there are opportunities for scheduling either a phone or face-to-face screen.

4. Initial walk-in at CFS

CFS will contact the Access department and inform of the nature of the situation. Access Support Staff will implement step 3 above.

5. Reminder Calls

For appointments scheduled in advance, Access Support Staff will give a reminder call to the parent/guardian or to the client in care of the residential program one business day prior to the scheduled appointment.

C. Post Screen:

1. Phone Screen

a. Children:

If the screen results in eligibility and referral for services, the Access Coordinator will give the Access Support Staff the referral packet to be mailed with appointment date, time, location, contact person, and map of the location to the parent/guardian along with the Notice of Recipient Rights, Your Rights Booklet, Privacy Practices Notice, and Client Handbook with list of Network providers. The Access Coordinator will ask the parent/guardian to take the signature pages with them to the intake appointment. The Access Coordinator will also inform the referred-to program when scheduling the appointment that this was a phone screen and that the Consent for Treatment, Release of

PROCEDURE MANUAL	06-15-09
SUBJECT: Telephonic Access Screens	PAGE: 5

Information, and Client Orientation Checklist will need completion at intake. The Access Coordinator will explain that if the parent/guardian does not bring in the signature pages of the Notification of Recipient Rights and Notice of Privacy Practices forms, they will need to complete these at intake. The Access Support Staff will document that they mailed this packet to the parent/guardian on the Phone Screen Checklist (see Attachment B). GCCMH Billing Department will complete Ability to Pay.

If the screened child is found ineligible for services, an Adequate Notice along with community referrals will be mailed to the parent/guardian by the Access Support Staff. The Access Coordinator will complete the Phone Screen Checklist and return to the Access Support Staff for filing.

b. Clients in SUD Residential Programs:

If the screen results in eligibility and referral for mental health services, the Access Coordinator will give the Access Support Staff the referral packet to be mailed with appointment date, time, location, contact person, and map of the location to the client's preferred address along with the Notice of Recipient Rights, Your Rights Booklet, Privacy Practices Notice, and Client Handbook with list of CMH providers. The Access Coordinator will ask the client to take the signature pages with them to their intake appointment. The Access Coordinator will also inform the referred-to program when scheduling the appointment that this was a phone screen and that the Consent for Treatment, Release of Information, and Client Orientation Checklist will need completion at intake. The Access Coordinator will explain if the client does not bring in the signature forms for Notification of Recipient Rights and Notice of Privacy Practices, they will need to complete these at intake. The Access Support Staff will document they mailed this packet to the client on the Phone Screen Checklist (Attachment B). GCCMH Billing Department will complete Ability to Pay.

If the screened client is found ineligible for mental health services, an Adequate Notice will be mailed with community referrals to the client at their preferred address by the Access Support Staff. The Access Coordinator will complete the Phone Screen Checklist and return to the Access Support Staff for filing.

2. Face-to-Face Screen

After completion of a screen that results in eligibility and referral for services, the Access Coordinator will make copies of the client's tax return forms, or have them fill out the reimbursement questionnaire, and return to the Access Support Staff no later than 8:15 a.m. the next business day so Access Support Staff can process the Ability to Pay information.

D. No Show/No Contact

In the event that a parent/guardian or residential client is not reached on the first attempt to make contact for a scheduled phone screen, the Access Coordinator will wait ten (10) minutes and then try the call again. If a parent/guardian or residential client cannot be reached for a scheduled phone screen upon the second attempt, this will be considered as a no show. The Access Coordinator will complete an outreach form letter for missed appointment and forward to Access Support Staff to send out via U.S. Mail in a confidential envelope (see Attachment C).

PROCEDURE MANUAL	06-15-09
SUBJECT: Telephonic Access Screens	PAGE: 6

IV. DEFINITIONS

Access Screen: A process to determine eligibility for specialty mental health supports and services at Genesee County Community Mental Health.

Support Staff: Secretary, Receptionist, Medical Clerk

V. TRAINING AND DISSEMINATION

Support Staff in Access, Customer Services and CFS; Coordinators in Access and Customer Services; CFS Supervisors; Billing/Claims Supervisor; Principal Account Clerk; SUD Residential supervisors will be trained on this procedure by the Access Supervisor. All child programs will be notified about the change of required intake paperwork to be completed at time of intake.

PROCEDURE MANUAL	06-15-09
SUBJECT: Telephonic Access Screens	PAGE: 7

Sample

Attachment A

Your Phone Screen appointment is:
Date: Time:
We will call you at: (client phone number)

[Guardian Name]
[Address]
[City, State Zip Code]

Dear Client:

[client name] is scheduled for a phone screen on [date, time] with Genesee County Community Mental Health Access Center. We will be calling you at [phone number], which is the number you provided to us. We will call you promptly at [time]. If we are unable to reach you, we will call back ten minutes later. If you are unable to keep this appointment, please contact our Access Center at 257-3740 to reschedule your appointment.

We appreciate you scheduling an appointment with us and if you have any questions, or need to reschedule your appointment, please contact us at 257-3740 (TTY 232-6310).

Sincerely,

Katie Baxter, LMSW, CAAC, AADC
Access Supervisor

PROCEDURE MANUAL	06-15-09
SUBJECT: Telephonic Access Screens	PAGE: 8

Sample

Attachment B

Phone Screen Checklist

Client Name: _____

Case Number: _____

A. No Answer for scheduled phone screen

Called on _____ at _____ and second call at _____
Date Time Time

No Show Follow-up Letter mailed to parent/guardian on: _____
Date

B. Phone Screen Resulted in Denial of Services

Adequate Notice Mailed on: _____
Date

Community Referral (GHP-B, Medicaid MHP, etc) mailed on: _____
Date

C. Phone Screen Approved for Services

Referral Packet mailed on: _____
Date

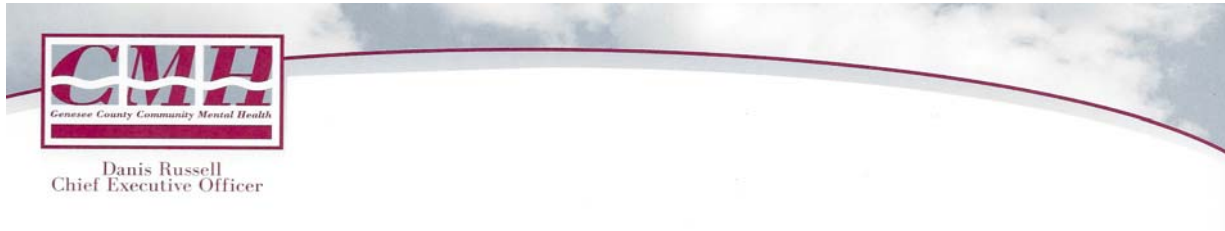
Referral Packet includes:

- Appointment Information (provider/time/date/contact name/map)
- Notice of Recipient Rights
- Your Rights Booklet
- Privacy Practices Notice
- Client Handbook with list of Network providers

PROCEDURE MANUAL	06-15-09
SUBJECT: Telephonic Access Screens	PAGE: 9

Sample

Attachment C



[Date]

[Guardian Name]

[Address]

[City, State Zip Code]

Dear Client:

We are sorry to have missed you for your scheduled phone screen with Genesee County Community Mental Health Access Center on [date] at [time]. We called you at [phone number] on [date] at [time] and placed a second call at [time], but were unable to reach you.

If you would like to schedule another appointment or if you have any questions about the services we provide, please contact us at 257-3740 (TTY 232-6310).

We hope to hear from you soon.

Sincerely,

Katie Baxter, LMSW, CAAC, AADC
Access Supervisor