

Example Workflow for Adult Substance abuse, outpatient:

Referral from N Florida Safety Counsel:

1. Receive fax, email, hard copy referral.
2. **Patient** calls or comes to facility.
3. Capture Email address
4. **Front Office Staff** determines which intake counselor/intern's calendar to enter for assessment.
 1. Determined by location
 2. Priority
 3. Availability
 4. Patient lookup (MIS# - patient identifier)
5. Email patient with access to portal for intake paperwork.
6. **Intake paperwork**, financial assessment, PHI, medicaid check.
7. If paper intake, enter information into system.
8. Ask for payment (payment not required for assessment)
 1. Amount determined by financial assessment.
 2. System takes CC payments.
9. Collect payment.
10. Assessment happens either via video or face-to-face:
 1. Counselor asks a few questions.
 2. Screenings (each of these get billed separately)
 1. Substance abuse
 2. Mental health
 3. HIV
 4. MAT - Medication assisted treatment
 3. Based on results of screening, do BIO/Physch/Social assessment
 4. Initial treatment plan, and participation agreement.
 1. Assign as "Individual" or "Group" treatment.
 5. Generate an interpretive summary from information gathered above.
 6. **Level of Care** determination.

1. Levels of Care:

- I. Intervention*
- II. Outpatient*
- III. Intensive Outpatient *
- IV. Residential*
- V. * eligible for After Care

2. If “Group” treatment

- i) If Medicaid patient, “Brief Behavior Status Exam” needed. Scheduled with licensed practitioner. Has to be delivered within 10 days.
- ii) Patient has to complete a treatment plan prior to joining.

7. Case Staffing: Patient is assigned to a counselor based on Level of Care and availability of the service.

1. Either assigned right away (Active), or waitlisted (Waiting) if at capacity, or service not available.

A. 2 types of Waitlist: Individual and Group.

B. Individual, exits waitlist:

- 1. Assigned counselor when service becomes available.
- 2. Moved
- 3. Declined
- 4. Died
- 5. No longer appropriate
- 6. Other

C. Group

- 1.

D. If waitlisted for a service

- (1)Assigned a Case Manager (interim service)
- (2)When the service becomes available, the

E. If assigned, schedule following up (Treatment Plan Appointment). Could be with different counselor.

8.

11.

Non-client specific Program

Workflow Example

1. Counselor receives a referral from School Admin
2. Staff member pulls student in for screening.
3. Send home parent permission form. Consent needed.
 1. Offer online option for permission form.
 2. Have upload for paper version to store in student profile.
4. Intake paperwork (7 forms)
5. Start on sessions, typically 1 per week.
6. 12-15 sessions, can fluctuate.
7. Finish sessions, do a discharge.

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