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**Intake-Referral Protocol**

1. *Respond within 2 hours to referral intake coordinator, if asked to take an ongoing client or to do an intake. A simple text will do.*
2. *If you accept the new referral, contact the client within 12 hours to schedule your initial appointment.*

1. *Make 3 attempts at scheduling client. Text, e-mail, call.*

*Fill out Referral outcome sheet and keep with file.*

*If client doesn’t come in for initial session with you, attach outcome sheet to the file and place in appropriate file cabinet.*

1. *Have your OA calendar up to date for current and the following week. If it shows you have an opening and a referral is made to you, it will be expected for you to take the referral and fit them in.*
2. *Client Intake paperwork (entire packet with diagnostic code written in) and insurance card need to be emailed to Richard, cc Jen by Sunday night of the week client intake is done, or provider will not be paid for client sessions.*

*Failure to comply with above protocol = 0 new referrals to you.*

**Protocol for Paper Intakes**

* *Original client contact - Must have entire completed Intake packet with insurance card(s) and medical information. If Cash client, make sure the DL# blank is filled.*
* *Recommendation: Make an email template with all the info for client you can reuse, then attach intake forms and send***.**
* **Be sure to ask client if they have any other insurance besides Beacon/Gold Coast***, or if they could be on anyone's policy, such as a parent/spouse.*
* *Fill out clinical assessment with client during the Initial Visit. If incomplete, screening can be done, but make sure the client knows they are not assigned to a therapist until all info is in.*
* *Completed Intake packet, clinical assessment and copy of Ins card(s) is sent to Richard, cc Jennifer and assigned therapist.*

**Adobe Sign for Electronic Intakes**

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*Login to Adobe:* [*documentcloud.adobe.com*](http://documentcloud.adobe.com/)

* *At the top, click on* ***Documents,*** *then find* ***Templates*** *on the bottom left.*
* *Under templates, choose the document you want to send (Intake).*
* *Click once to highlight, then on the right side, scroll down to choose* ***Use Template*** *on bottom left.*
* *Enter recipient email and customize the subject line with your name. Click “next”, the document to send will come up. Hit* ***Send****. That’s it!*

*The signed copy will be under “All Agreements” in Adobe Sign. When you receive it, forward to Richard, cc Jen.*

*Note: Please do not delete any documents or templates. Thank you.*

**Cash Clients**

* *When taking cash clients, keep a* ***Payment log*** *to turn in at the end of the month.*
* *Put cash & checks in the manilla envelope in the file cabinet at Maple, or if Paypal only, send log by email to Richard cc Jen.*
* ***Checks*** *are to be made out to Maple or Transformational Counseling, depending which entity you work under.*
* *You can take payments via* ***Paypal****, adding a $2 fee for paypal fees. Send the client the link to Maple’s Paypal payment webpage:* [Payment (maplecounseling.org)](https://www.maplecounseling.org/payment.html#/)