

# Parenting Assessment Referral Procedure

- Receive Referral
- Review Referral

## Contact The Client

- Contact the client explain your role to the client, and set up your first initial appointment WITHIN 24 HOURS OF RECEIVING THE REFERRAL. When leaving, a message use this script.

### (Sample Script)

IF Client Does Not Answer: Hello, My name is *(Your Name)* I am trying to reach *(Clients Name)* Please give me a call back at *(your phone number)*

\*\*\*\*\*MEET WITH THE CLIENT WITHIN 24- 48 HOURS OF RECEIVING THE REFERRAL) \*\*\*\*\*

### (Sample Script)

Hello, My name is \_\_\_\_\_ I will be your Parenting Assessor. The parenting assessment is designed to better understanding of your needs. This will allow DCS to put proper support in place to help you reach your goals. I will meet with you a few times over the next few weeks to complete forms and an assessment that was ordered by (FCM Name). What is a good day for our initial meeting? I will complete intake forms and explain the assessment in more details.

## Contact The FCM

- Send an e-mail to the FCM using the email template on page 2 of this document as a guide. ( Attach a copy of this email to the client file in CMP.

## First Face to Face Meeting

During the first meeting make sure you retrieve all pertinent information that is needed. By the end of this assessment your goal is to understand the client's story and determine what support is needed, and assist in determining the services necessary to improve the family's functioning.

### (Give the client an explanation of each form prior to filling out the form)

- Leave a copy of your business card and one of the director's business cards.
- The following forms should be completed during this visit
  - Consent to Services
  - HIPPA
  - Safety Plan
  - Client Rights and Responsibility
  - TeleHealth informed consent
  - Consent for Release of Information for DCS & all collateral contacts that will be used for this assessment.
- Collect a copy of the clients state ID.
- Set your schedule with the client and help them document the appointments in their calendar. The assessment shall include at least two separate appointments held on different days.
- Take note of the client's strengths & needs.
- Schedule the observation session. (This should take place while the client is with their children)
- Complete a progress note in CMP
- Complete Session Sign in sheet (for face to face time with clients)
- Begin written assessments (AAPI & Purposeful Parenting Intake Assessment), observations & interview if appropriate.
- For clients seen remotely print proof of meeting and upload it to the clients CMP file.

## Second - Final Contact

- Finish written assessments that require client input(AAPI & Purposeful Parenting Intake Assessment), observations & interview
- Complete observation portion of the parenting assessment.
- Complete progress note in CMP
- Complete progress note for each collateral contact communication.
- Complete Service Plan in CMP
- Complete Session Sign In Sheet (for face to face time with clients)
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## After Final Contact

- Finish all assessment documentation (AAPI & Purposeful Parenting Intake Assessment & Written Report)
- Complete DCS Monthly Report Form in CMP
- Submit completed client file
- Schedule & attend supervision.
- Send Survey to client and FCM/Probation or Choices Coordinator

# INITIAL E-MAIL TO FCM TEMPLA TE

Dear **[Insert FCM Name]**,

Thank you again for referring [Insert name of client] to the Parenting Assessment program at Purposeful Parenting LLC. My name is **[Insert your name]** and I am the Therapist assigned to this family. I will attempt to contact the client immediately.

Can you please let me know your availability to discuss this case? I would like to begin gathering background information on this case as soon as possible.

Purposeful Parenting appreciates the opportunity to serve this client and I look forward to working with you.

Sincerely,