Meaningful Day Services
Everyone deserves Meaningful Days!

SECTION	**ABA**
Policy Number	**0013**
Policy Name	**New Client Intake**
Effective Date	**March 2020**
Revision Date	**11/15/21**

New Client Intake

I. Policy Statements

1. The purpose of this policy is to outline the process for the intake of a new client.
2. An ABA intake meeting can be set up after a referral is taken.
3. An intake meeting is a 1.5 hour long informational meeting in which families have a chance to meet with an ABA representative, tour the facility, and ask any questions they might have.
4. An intake meeting may be in clinic or via Zoom meeting ("tele-intake")
   a. Tele-intakes will only occur when deemed appropriate by ABA administrative team (e.g., extended clinic closures, etc.)

II. Procedures

(In-person intake)

1. Administrative Assistant works with client family and ABA representative who will complete intake meeting to determine a mutually available time block of 1.5 hours for meeting to take place.
2. Administrative Assistant adds the agreed upon 1.5 hour time block to TrackSmart and notify the team via email.
   a. Client Coordinator ABA representative will update referral summary and referral tracker.
3. Administrative Assistant will email client caregiver all necessary documents to complete via Microsoft Forms including:
   a. Welcome Packet
   b. Welcome Packet Signature Page
   c. Release of Information
   d. Assignment of Benefits
   e. Assessment Pretest
   f. Intake Assessment
4. Client Coordinator or administrator assigned duty will monitor Forms for document results.
   a. After results are received, assigned person will upload PDF versions of documents to Accel/Provide.
5. Administrative Assistant requests scanned copy of Medicaid/insurance card and diagnostic paperwork.
   a. These documents should be returned before the intake meeting.

    b. Administrative Assistant will forward these documents to Client Coordinator.
6. Administrative Assistant reserves a conference space for the meeting and will include this information to the notes for the meeting in TrackSmart.
7. Administrative assistant adds primary caregiver's phone number to Remind.com under "ABA Intake Families" group.
8. Administrative assistant sends reminder text 24 hours before the meeting is scheduled to take place, requesting confirmation.
9. Intake meeting takes place.
    a. ABA representative discusses:
        i. History of ABA Program
        ii. What is ABA?
        iii. RBTs and Scheduling
        iv. BCBAs and Bridge to Home
        v. Becoming a Client
    b. ABA representative will complete the following documents with caregiver:
        i. ABA Intake Questionnaire
        ii. Barriers to ABA Services
10. ABA representative will obtain copies of diagnostic paperwork and Insurance and/or Medicaid Card (if not returned previously)
11. Once all documents are returned and completed, they will be emailed to Client Coordinator and the assessment process will begin (see ABA 0001 – Obtaining ABA Funding for details).
12. Client Coordinator ABA representative will update referral summary and referral tracker.

(Tele-intake)

1. Prior to scheduling, a member of the ABA administrative team will contact client guardian to verify that tele-intake will be possible based on their access to compatible technology.
    a. "Compatible technology" could include laptop, desktop, smartphone, or tablet that has Zoom capabilities.
2. Client Coordinator or ABA representative works with client family to determine a mutually available time block of 1.5 hours for meeting to take place.
3. Client Coordinator or ABA representative adds the agreed upon 1.5 hour time block to TrackSmart and notifies the administrative team via email.
    a. Client Coordinator or ABA representative will update referral summary and referral tracker after this step is complete.
4. Client Coordinator or ABA representative sends the following documents to caregiver vie email to complete and/or submit BEFORE teleintake meeting occurs:
    a. Welcome Packet
    b. Signature Page
    c. Release of Information
    d. Assignment of Benefits
    e. Assessment Pretest
    f. Intake Assessment

  g. Telehealth Consent Form (this should include their email for Zoom)

5. Client Coordinator or administrator assigned duty will monitor Forms for document results.
   a. After results are received, assigned person will upload PDF versions of documents to Accel/Provide.
6. Client Coordinator or ABA representative requests scanned copy of Medicaid/insurance card and diagnostic paperwork.
   a. These documents should be returned before the intake meeting.
7. Once consent form and documents are received, Client Coordinator or ABA representative will set up a Zoom link and email invitation to guardian for the agreed upon date and time.
8. Administrative assistant adds primary caregiver's phone number to Remind.com under "ABA Intake Families" group.
9. Client Coordinator or ABA representative sends reminder text 24 hours before the meeting is scheduled to take place, requesting confirmation.
10. Intake meeting takes place.
    a. ABA representative discusses:
       i. History of ABA Program
       ii. What is ABA?
       iii. RBTs and Scheduling
       iv. BCBAs and Bridge to Home
       v. Becoming a Client
    b. ABA representative completes the following documents with caregiver:
       i. ABA Intake Questionnaire
       ii. Barriers to ABA Services
11. Once all documents are returned and completed, they will be emailed to Client Coordinator and the assessment process will begin (see ABA 0001 – Obtaining ABA Funding for details).
12. Client Coordinator ABA representative will update referral summary and referral tracker.