



## Providing Initial Intake or Client Orientation to Services

Hour Requirements 25

### Intake Definition

The intake process establishes the client's baseline status, needs, and information and initiates the treatment relationship. Intake, screening, and client orientation is often the initial contact between a person and the treatment system. The client forms their first impression of treatment during screening and intake. For this reason, how screening is conducted can be as important as the actual information gathered, as it sets the tone of treatment and begins the relationship with the client.

Each provider has an intake process that may include completing standardized screening tools and forms required by the state or your organization. The process generally allows the behavioral health provider to talk with the individual to develop rapport prior to a review of the completed intake packet.

### Components of the Intake Process

- Collecting client paperwork, including ROI, Consent to Treat, HIPPA, and any other necessary documents.
- Identifying and exploring the "chief complaint" or "presenting problem."
- Identifying significant life history and background.
- Reviewing client symptoms in various life domains using the Alaska Client Status Review of Life Domains (CSR) or similar tool.
- Referring for an assessment if this is indicated in the screening process
- Conducting a brief mental status exam to determine their current emotional and mental state.
- Making preliminary diagnostic impressions.
- Begin discussion about treatment goals.

### Examples of Intake Activities

- Implementing intake screening questions required by your organization, such as the Alaska Screening Tool 2011 (AST2011), Client Status Review of Life Domains (CSR), or other screening requirements.
- Entering in AST2011/CSR into Alaska's Automated Information Management System (AKAIMS).
- Communicating with the client about potential internal and external services.
- Completing program enrollment and admission paperwork in AKAIMS and/or Electronic Health Record (EHR).
- Arranging for appropriate assistance for the client in response to language or reading/writing limitations.
- Reviewing mandatory service requirements for a mandatory client (ASAP, OCS).
- Engaging and encouraging at-risk individuals to participate in services.
- Developing any sections of the treatment plan as appropriate, e.g., a list of client strengths and needs.
- Reviewing treatment plan with the client, obtaining signature, and delivering plan to appropriate parties.
- Reviewing the electronic Behavioral Health Aid Manual (eBHAM) to help define the chief complaint.
- Going over the client's rights and responsibilities.
- Explaining the rules and limitations of HIPAA, including appropriate disclosure of treatment records and the limits of confidentiality.
- Completing a Short-term Crisis Intervention.
- Observing supervising clinician in any of the above activities.

### Evidence-Based Practices and Resources

- Alaska Screening Tool 2011 (AST2011) [http://dhss.alaska.gov/dbh/Documents/Resources/pdf/AST\\_2011.pdf](http://dhss.alaska.gov/dbh/Documents/Resources/pdf/AST_2011.pdf)
- Alaska Screening Tool and Guidance Document 2011  
<http://dhss.alaska.gov/dbh/Documents/Resources/pdf/AST%20CSR%20Clinical%20Decision%20Making%202011%20slw%206%2030%2011.pdf>
- Client Status Review of Life Domains 2014 (CRS) <http://dhss.alaska.gov/dbh/Documents/Resources/pdf/CSR-2014.pdf>



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- Brief Mental Status Exam [https://wchsa.org/wp-content/uploads/2017/04/brief\\_mental\\_status\\_exam.pdf](https://wchsa.org/wp-content/uploads/2017/04/brief_mental_status_exam.pdf)
  - SAMHSA Screening Tools <https://www.integration.samhsa.gov/clinical-practice/screening-tools>
  - SAMHSA Treatment Planning Resource  
[https://www.ihs.gov/rpms/training/course-materials/?p=rpmsTraining%5Cintegrated+Behavioral+Health%5CIBH\\_Treatment\\_Plans.pdf&fname=IBH\\_Treatment\\_Plans.pdf&download=1](https://www.ihs.gov/rpms/training/course-materials/?p=rpmsTraining%5Cintegrated+Behavioral+Health%5CIBH_Treatment_Plans.pdf&fname=IBH_Treatment_Plans.pdf&download=1)