



BHA Practicum Requirements

Providing Client Orientation to Services including screening and initial intake, with appropriate documentation

Hour Requirements 25

Intake Definition

Intake is the first step in understanding a client's current situation, needs, strengths, and basic information. Intake is also the beginning of the treatment relationship. Because intake, screening, and orientation are often a person's first direct contact with the treatment system, this process helps shape their initial impression of services. The way screening is completed matters as much as the information collected because it helps establish trust, clarify expectations, and set the tone for future work with the client.

Although intake procedures may vary by provider, they commonly include state- or organization-required forms, standardized screening tools, and other required documentation. This process gives the behavioral health provider an opportunity to speak with the individual, begin building rapport, and review the completed intake packet in a supportive and organized manner.

Components of the Intake Process:

- Collecting client paperwork including Release of Information (ROI) forms, Informed Consent to Treatment, Privacy Practices, 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 an evidence-based client status screening tool.
- Referring to an assessment if indicated in the screening process.
- Conducting a brief mental status exam to determine their current emotional and mental state.
- Making preliminary diagnostic impressions.
- Beginning discussion about treatment goals
- Scheduling future appointments for assessment and/or other counseling services.

Examples of Intake Activities:

- Implementing intake screening questions required by your organization or other screening requirements.
- Entering information collected during a screening in your organizational Electronic Health Record (EHR).



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- Communicating with the client about potential internal and external services.
- Completing program enrollment and admission paperwork in AKAIMS and/or 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 a supervising clinician in any of the above activities.

Evidence-Based Practices and Resources

- Alaska Screening Tool and Guidance Document (the Screen Tool is no longer used, but the Guidance Document provides helpful information about the intake process.)
<https://www.akchap.org/wp-content/uploads/2026/06/02-AST-CSR-Clinical-Decision-Making-2011-slw-6-30-11.pdf>
- Brief Mental Status Exam
https://www.akchap.org/wp-content/uploads/2026/06/brief_mental_status_exam.pd_.pdf
- Substance Abuse and Mental Health Services Administration (SAMHSA) TAP 21 Addiction Counseling Competencies. See the full document here: <https://library.samhsa.gov/product/tap-21-addiction-counseling-competencies/sma15-4171> See the Clinical Evaluation Section here: https://www.akchap.org/wp-content/uploads/2026/06/TAP_21_Clinical_Evaluation.pdf