



SA Intervention Clinical Tool

SA Intervention Cx Consent (65D-30.0042 (1)(d)) Consent for Services: A consent for services form shall be signed by the individual prior to or upon placement, with the exception of involuntary placements.

SA Intervention Cx Ct. Information (65D-30.004 (12)(c)(3)) Name and address of client and referral source;

SA Intervention Cx Ct. Information (65D-30.004 (12)(c)(3)) Informed consent for a drug screen, when conducted;

SA Intervention Cx Ct. Information (65D-30.004 (12)(c)(3)) Client placement information, (except case management)

SA Intervention Cx Ct. Information (65D-30.004 (12)(c)(3)) Record of disciplinary problems, as applicable;

SA Intervention Cx Ct. Information (65D-30.004 (12)(c)(3)) Record of ancillary services, as applicable;

SA Intervention Cx Ct. Information (65D-30.004 (12)(c)(3)) Reports to the criminal and juvenile justice systems, as applicable;

SA Intervention Cx Ct. Information (65D-30.004 (12)(c)(3)) A transfer or discharge summary, as applicable;

SA Intervention Cx Ct. Information (65D-30.004 (12)(c)(11)) Copies of service-related correspondence generated or received by the provider

SA Intervention Cx Determ of Need (65D-30.0042 (1)(a)) "Determination of Need and Eligibility for Placement. The condition and needs of the individual shall dictate the urgency and timing of screening; screening is not required if an assessment is completed at time of admission. All individuals presenting for services, voluntarily or involuntarily, shall be evaluated to determine service needs and eligibility for placement or other disposition. The person conducting the screening shall document the rationale for any action taken and the validated tool used for service determination."

SA Intervention Cx Dx (65D-30.0044 (a)) Discharge Summary. A written discharge summary shall be completed for individuals who complete services or who leave the provider prior to completion of services. The discharge summary shall include a summary of the client's individual's involvement in services and, the reasons for discharge, and the provision of and referral to other services needed by the individual following discharge, including aftercare. The discharge summary shall be completed within 15 business days and signed and dated by a primary counselor.

SA Intervention Cx Interv. Plan (65D-30.004(19)(b)) Reviewed and updated at least every 60 days.

SA Intervention Cx Notes (65D-30.004(19)(c)) Summary notes shall be entered into the individual's clinical record at least weekly for those weeks in which services are scheduled. Summary notes shall contain information regarding an individual's progress or lack of progress in meeting the conditions of the intervention plan.



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SA Intervention Cx Plan (65D-30.004(19)(b)) Goals and objectives designed to reduce the severity and intensity of factors associated with substance use.

SA Intervention Cx Plan (65D-30.004(19)(b)) Signed and dated by staff who developed the plan and signed and dated by the individual.

SA Intervention Cx Plan (65D-30.004(19)(b)) For individuals involved in intervention on a continuing basis, an intervention plan shall be completed within 45 calendar days

SA Intervention Cx ROI (65D-30.004(13) 42 Code of Federal Regulations, Part 2.) Consent for Release of Information Contains the following:

- (1) Program permitted to make the disclosure,
- (2) Individual/organization to which the disclosure is to be made,
- (3) Purpose of the disclosure,
- (4) How much and what kind of information to be disclosed,
- (5) Signature & date of client/guardian (May be signed by the individual only if the form is complete)
- (6) Statement that consent is subject to revocation at any time,
- (7) Expiration Date of consent

SA Intervention Cx Screening (65D-30.004 (12)(c)(2), 65D-30.0042 (1)) Screening information: If the screening is not completed by a qualified professional, then it shall be countersigned and dated by a qualified professional.

SA Intervention Cx Summary Notes (65D-30.004(19)(c)) Each summary note shall be signed and dated by staff delivering the service.

SA Intervention Cx Summary Notes (65D-30.004(19)(c)) Summary notes shall contain information regarding a participant or client's progress or lack of progress in meeting the conditions of the intervention plan.

SA Intervention Cx Summary Notes (65D-30.004(19)(c)) Summary notes shall be entered into the client record at least weekly for those weeks in which services are scheduled.

SA Intervention Cx Transfer (65D-30.0044 (b)) Transfer Summary. A transfer summary in accordance with policies and procedures shall be completed immediately for individuals who transfer from one (1) component to another within the same provider and shall be completed within 5 calendar days when transferring from one (1) provider to another. In all cases, an entry shall be made in the individual's clinical record regarding the circumstances surrounding the transfer and that entry and transfer summary shall be signed and dated by a primary counselor within 15 days.