**Scheduling Form &**

**Group Referral Binder Procedure**

Use of Scheduling Form:

* At the end of each session, providers will complete the clinic’s Scheduling Form. This form should be used to initiate a referral to a group, or to schedule a follow-up appointment for individual psychotherapy or medication management. Providers will also indicate any outcome measures that need to be given at the next appointment by circling the measures on the form (e.g., PCL-5, PHQ-9, etc.) or designating them in BHDP, if available.
* Providers will hand the form to the patient, who will then bring the form to the front desk staff to schedule their next appointment.
* After collecting the Scheduling Form from patients, front office staff will perform the following:
  + If referred to a group, get the Group Therapy Referral Binder (kept in front office administrative area). Locate the group the patient is referred to and ask the member to take a picture of the group flyer (located on the front sleeve of the document protector) or give them a copy of the flyer. Front office staff will record the group start date and time on the backside of the Scheduling Form. They will then record necessary information on the Referral List (located on the backside of the document protector) to include:
    - First and last name of patient
    - Last 4 of patient’s SSN
    - Date of referral
    - Cell/home contact number
    - Work contact number
    - Name of referring provider
  + If the Scheduling Form identifies that a follow-up session is needed with the provider, please schedule the patient accordingly. For example, if the form requests that the patient be scheduled in two weeks, then look for availability in that time frame. If no appointment is available in the requested time frame, then call the provider to inquire about the next step in scheduling. For instance, the provider may want to create an appointment in two weeks or schedule the patient further out.
  + If the Scheduling Form requests an appointment be scheduled with psychiatry, the front office staff will inquire about whether the patient is already seeing a psychiatrist. If yes, then schedule the patient for the next available follow-up appointment with that psychiatrist. If no, then look for the next available intake with psychiatry.
  + If the Scheduling Form lists any measures to be given at the next appointment with the provider, then include these in the comments section when booking the appointment in CHCS. If using the BHDP, this step will not be necessary.
  + Check the Scheduling Form for any additional comments from the provider. If questions are present, call the provider for clarification or follow-up.
* Scheduling Forms will be returned to the patient upon completion of the above process, serving as a reminder of their next appointment(s) and as a reference for crisis response plans (if needed).

Group Referral Binder Procedure:

* The Group Referral Binder must be kept in the front office administrative area. As part of the clinic closing procedures at the end of each workday, the front office staff will be responsible for ensuring that the Binder is locked securely in the High Interest File Cabinet or another secure location.
* If a group is not accepting new patients (due to it being a closed group or the group being full), then please record the necessary information on a new group referral form so that the patient can join the next group or be contacted by the group leader(s).
* Group leaders are responsible for collecting or reviewing their referral sheets prior to the start of the group session. By entering the group members to the schedule on a weekly basis, changes in group membership can be easily made without having a negative impact on No Show/ Late Cancellation rates.
* The group referral sheets should also be used by group leaders or BH Techs to call referred group members and remind them of group session(s). As needed, new referral sheets will be updated and placed into the Group Referral Binder.