

Core Function #2 INTAKE

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Definition of INTAKE:

**The administrative and initial assessment procedures
for admission to a program.**

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The intake process is sometimes explained as a continuation of screening or an in-depth assessment of a client. Intake is simpler than that. Intake is merely: “the administrative and initial assessment procedures for admission to a program.” It is all about the paperwork to get the client into treatment.

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The *INTAKE* process follows the initial *SCREENING*. Whereas the the initial *SCREENING* tries to rule out potential clients as ineligible or inappropriate for a treatment program, initial assessment procedures during the *INTAKE* process tries to “rule in” clients for treatment. The *INTAKE* documentation “proves that the client is both eligible and appropriate for admission.

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INTAKE does become an extension of *SCREENING* that results in either the decision to admit an individual as a client (and the assessment and treatment process continues) or the individual is determined to be ineligible or inappropriate for the treatment program (in which case a referral to another program or professional resource may be made, if appropriate).

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During *INTAKE* various record forms are completed. Typically, the client and counselor fill out an admission or intake form, sign the HIPPA form, collect financial data, and sign a consent for treatment and any authorizations to release information that are identified as appropriate at this point in the process. Signing a Client Rights and Responsibilities Form is a document appropriate for *INTAKE*. Explaining the information on the form is part of the next Core Function, *ORIENTATION*.

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The *INTAKE* counselor also will document the initial assessment in accordance with agency policy in enough detail to assist a subsequent and more comprehensive assessment. This documentation becomes part of the client record.

In many substance abuse treatment facilities, the next core function – *ORIENTATION* – also is completed during the *INTAKE* session. If not then, an additional appointment is made to orient the client and continue the *ASSESSMENT* process.

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Your role is to determine that this particular individual is indeed eligible and appropriate for your program. It typically involves much paperwork depending on the type of program, its focus, its needs, and its philosophy.

The counselor must balance the need to complete paperwork with establishing the initial therapeutic relationship. Failure to adequately complete required paperwork may leave the counselor and agency open to litigation should a client believe they were wronged in some way.

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In many treatment programs, the functions of *INTAKE*, *ORIENTATION*, and *ASSESSMENT* are often part of the first appointment. Creating a balance of paperwork, listening to the client, and doing an assessment should contribute to reducing the anxiety of the client, establishing initial rapport, and facilitating the assessment and future treatment process.

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A competent counselor/coach will know how to:

- Complete required documents for admission to the program.
- Complete required documents for program eligibility and appropriateness
- Obtain appropriately signed consents when soliciting from or providing information to outside sources to protect client confidentiality and rights

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Take the following pieces of information and determine which form would be possibly used during INTAKE:

INFORMATION:

- A. AMOUNT OF SUBSTANCES USED
- B. BLACKOUTS
- C. GENDER
- D. AGE
- E. COLLATERAL CONTACT INFORMATION
- F. COEXISTING CONDITIONS
- G. PRIOR TREATMENT EPISODES
- H. VETERAN STATUS
- I. ABILITY TO PAY
- J. DEPRESSION
- K. CIRRHOSIS
- L. DWI
- M. CLIENT CONSENT FOR TREATMENT
- N. CLIENT UNDERSTANDING OF CONFIDENTIALITY
- O. CLIENT CONTACT INFORMATION

POSSIBLE FORMS:

- 1. CLIENT INTAKE FORM (BIO-PSYCHO-SOCIAL-SPIRITUAL)
- 2. HIPPA NOTICE
- 3. RELEASE OF INFORMATION
- 4. PRE-TREATMENT SCREENING
- 5. INFORMED CONSENT
- 6. PAYMENT AGREEMENT
- 7. CLIENT CONFIDENTIALITY RIGHTS

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12 Core Functions of Alcohol and Drug Counseling:

- 1. Screening
- 2. Intake
- 3. Orientation
- 4. Assessment
- 5. Treatment Planning
- 6. Counseling
- 7. Case Management
- 8. Crisis Management
- 9. Education
- 10. Referral
- 11. Reports and Record Keeping
- 12. Consultation

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