

**SIU CLINICAL CENTER**  
**PSYCHOLOGICAL SERVICES MANUAL**  
**Psychology and Counseling Policies and Procedures**

Welcome to the SIU Clinical Center! We are excited to have you join us.

The Clinical Center is where our clinical psychology students complete most of their clinical training. It also serves trainees from the Counselor Education and Speech Language programs.

**This manual is specifically for Clinical Psychology graduate students.**

We hope that this manual will be a resource for you moving forward. It describes in detail the procedures that you will quickly become familiar with to navigate working at the clinic. While we will go over much of this information with you in person, it is hard to remember everything when you first start. But these tasks will quickly become second nature to you!

**In the meantime, please refer to this manual if you have questions about scheduling, Titanium, and more!**

The table of contents includes links to various sections so you can easily find what you are looking for. There are also links included throughout the manual to help make navigating easy.

If you have additional questions after reviewing the manual, please feel free to ask one of the Clinical Center Graduate Assistants (GAs), the Clinical Center director, or any other member of the Clinical Center staff.

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## PSYCHOTHERAPY

The Clinical Center provides therapy services for children, adolescents, and adults for a variety of concerns.

**COST:** The standard fee that we charge is \$30 per session. We also offer a sliding scale for clients that allows them to qualify for lower fees based on income. Using this sliding scale, the cost can be between \$5 and \$30. To qualify for reduced fees, clients must first complete the Reduced Fee Application form. This form can be found on the Clinical Center website's resources page (<https://clinicalcenter.siu.edu/resources/>). For telehealth sessions, clients must pay prior to their appointments either via check in the mail or via credit card by phone. For in person sessions, clients pay at the front desk when they arrive.

### **ASSIGNING CASES**

For clients to begin services at the Clinical Center, they must first meet with a clinician to do an intake during which information about the client's background and presenting concern is collected. The Clinical Center GAs conduct intakes. Once an intake is conducted and written up, clients are added to the waitlist with information about the presenting concerns. More information about conducting intakes can be found in the [intake](#) section of this manual.

After reviewing the waitlist, if you or your supervisor think that you should be assigned a particular case, you and your supervisor will reach out to Dr. Cormier via email to request the assignment. Your email should include the client ID number and client initials.

Upon receiving your email, Dr. Cormier will email you and your supervisor that the client has been assigned to you. **You must attempt to make contact with that client within 24 hours of assignment.** All contact with clients should be made using the Clinical Center phone.

**EMAILING CLIENTS TO SCHEDULE IS NOT PERMITTED.** For information about how to make a call, see the [making calls](#) section of this manual. Any time you make a call to a client, a phone note must be added to Titanium. For information about adding phone notes to Titanium, please see the [documentation](#) section of this manual.

If the client answers your call, proceed to schedule with them via phone. Instructions for scheduling an appointment with your client can be found in the [scheduling a therapy client](#) section of this manual. **Please review this section before making your call.**

If the client does not answer the call, you can leave a message informing them of who you are, that you are calling from SIU, and that you will leave placeholders on the schedule for them to call back and schedule with the front desk. Then you will need to go into Titanium and add placeholders to your schedule that reflect your availability. Please see the [documentation](#) section of this manual for steps to complete this.

If you have attempted to contact the client two times by phone within one week but are unable to contact them to schedule, please send the **"initiating services letter"** to the address in the

client's Clinical Center file. **The letter should be sent on the day of the second call.** The template for this letter can be found on the Clinical Center One Drive in the "Letter Templates" folder. For more information about how to send letters, see the [paperwork](#) section of this manual.

If you do not hear from the client by the date indicated in the initiating services letter, please notify your supervisor and proceed with closing the case. Information about closing cases can be found in the [closing cases](#) section of this manual.

## SCHEDULING A THERAPY CLIENT

Before calling your client to schedule, please ensure that you have times ready to provide them that you are available to schedule a session.

Sessions last for 45-50 minutes and can be scheduled on Monday/Wednesday between 8:00AM and 5:00PM (session ending at 5:00, so beginning at 4:00PM) and Tuesday/Thursday between 8:00AM and 8:00PM (session ending at 8:00, so beginning at 7:00PM).

Therapy sessions are **NOT** offered on Fridays. Psychological assessment appointments can be scheduled on Fridays.

Therapy sessions begin on the hour (e.g., 2:00PM, 4:00PM) and **cannot** be scheduled to begin on the half hour (e.g., 4:30PM) without permission from the Clinical Center director.

Then call your client. For information about making calls, see the [making calls](#) section of this manual. When your client answers the phone, offer them your availability, and ask them what works best for them. Confirm whether the appointment will be occurring in person at the Clinical Center or virtually via telehealth.

Once you have agreed upon a time for your session, complete a phone note in Titanium. For information about adding phone notes to Titanium, please see the [documentation](#) section of this manual.

After adding your phone note, you need to add the appointment to your schedule in Titanium. **It is critical that appointments are added to your Titanium schedule promptly for billing purposes.** Please see the DOCUMENTATION section of this manual for instructions on how to do this.

After adding your appointment to Titanium, you must book a room for your appointment. For instructions on how to do this, please see the [rooms](#) section of this manual.

## CONDUCTING IN PERSON PSYCHOTHERAPY SESSIONS

Be early for your appointments. You should be at the Clinical Center no later than 15 minutes before your appointment time.

Go to the therapy room that you reserved through the front desk to set-up for the session (e.g., turn on the computer and login, set up for recording your session, adjust seating and lighting).

Please note that therapy rooms are used by multiple clinicians throughout the day. **You**

**may not be able to access your room until right before your session as there may be a session in progress.** Please see the [rooms](#) section of this manual for policies regarding this.

When your client arrives for an **in-person** session, the front desk will mark them as attended in Titanium. If you have Titanium open on the computer in the therapy room, you will get an alert that your client has arrived. When you hear this alert **or** at your session time, go to the waiting room and escort your client back to your therapy room. For telehealth sessions, when your client arrives you are responsible

If the client arrives more than 10 minutes after their session was supposed to begin, the session should not proceed, and they should be marked as a no-show. If the client arrives at the Clinical Center, you should talk with them then about rescheduling. If the client never comes to the Clinical Center, you should call them later that day to discuss rescheduling.

### First Sessions and Paperwork

If it is your first session with the client (i.e., if they are a new client or a transfer client) the following paperwork must be completed at the beginning of the session. The forms are listed in the order it is recommended to review them. For information about completing paperwork, please see the [paperwork](#) section of this manual. The paperwork forms can be found on the Clinical Center website's resources page (<https://clinicalcenter.siu.edu/resources/>).

#### New **IN PERSON** Psychotherapy Client

1. Consent to record (*begin recording after this form is completed*)
2. Informed consent for psychological services
3. Informed consent for telehealth
4. Therapist-Client Agreement

### In Person Recordings

All sessions must be recorded. If it is **NOT** your first session with a client, begin recording the session **before** you go get your client from the waiting room. If it **IS** your first session, begin the recording after you review the “informed consent to record” paperwork. This should be the first form you review with the client.

Recordings are made using the camera app on the computer. To access this application, just search “Camera.” Move to video option (looks like a video camera). Then be sure to complete the following steps before your session:

**Step 1:** Click the settings button in the top left corner (it looks like a wheel).

**Step 2:** Edit the video quality to a lower resolution. Do this by selecting the gear icon in the top-left of the window, scrolling down to the “Videos” section, selecting “Video quality” and scrolling down to the bottom of the list and selecting **240p 53:50 30fps**.

**Step 3:** To begin recording, make sure on the right-hand side of the window that the icon with the shape of a video camera is selected and then press the white video camera button.

Step 4: Then you will need to adjust the computer so that the client cannot see the video as it is often distracting to session. Do not minimize the camera app or else the camera will stop recording. Instead, you can turn off the monitor by pressing the power button on the physical monitor (bottom right-hand corner, usually). You can also put the computer to sleep by clicking the windows icon in the bottom left-hand corner, then clicking the “Power” button, then clicking “Sleep.”

Step 5: When you are done with the session, press the red and white recording button again on the right-hand side of the window to stop the video.

The recording then needs to be moved to your supervisor’s folder through the following steps:

Step 1: Once you stop the recording, a thumbnail for your recent video will appear in the bottom right corner of the screen in a small square. Click on this thumbnail to open the video.

Step 2: Once you are viewing the video you just took, click on the three dots in the top-right corner of the window and select “Open Folder.” After you have opened the file explorer to the location of the saved video, make sure to close the Camera application so that you can make changes to the file.

Step 3: Open the “Video Shares” folder on the desktop.

Step 4: Open your supervisor’s folder (e.g., “Holly Cormier”).

Step 5: There should be a folder within your supervisor’s folder that has your name. Open this folder. If you do not have a folder, contact the Clinical Center director and your supervisor to have it added.

Step 6: Drag and drop the video from its location in the file explorer to your folder (within your supervisor’s folder). This will make a copy in the designated folder.

Step 7: Once in your supervisor’s folder, the video file should be named using the following format: [Your Last Name]\_[Client Initials] [Month.Day.Year (of the session)]

Example: Jones\_AA 1.1.2000

Videos then **must be deleted** from the computer:

Step 1: Select the original “File Explorer” location with your video (i.e., Camera Roll subfolder).

Step 2: Right click on the video from your session and select “Delete.” You can then close the “File Explorer.”

Step 3: Right-click on the “Recycle Bin” on the desktop and select “Empty Recycle Bin.”

The computer will prompt you to make sure you are ready to empty the recycling bin.

*NOTE* that if your video is not properly saved in your supervisor’s folder it will be lost permanently after emptying the recycling bin! Click yes to finalize deleting the videos.

## **In Session**

Psychotherapy sessions are a maximum of 50-minutes in length. You should **aim to wrap up your sessions by 45 minutes** as it usually takes longer than you anticipate. This helps with clinic and room flow.

If you have concerns about a client’s safety or you are concerned you may need to make a DCFS report, find a Clinical Center supervisor immediately. If you are debating whether the situation needs a supervisor, get the supervisor anyway. It is better to be safe than sorry! A supervisor will



never be upset with you for interrupting them to check in about a client crisis.

### Post Session Tasks

Step 1: After finishing your session and moving your recordings, please ensure that it is reasonably neat, and all furniture is placed where it was before you entered.

Step 2: Move the recording to your supervisor's folder by following the instructions above.

### Progress Notes

Step 3: You are required to write a **progress note** after each session. **Notes must be completed within 24 hours of the session.** Please see the [documentation](#) section of this manual for information regarding how to write notes in Titanium.

**Fifth Session Treatment Plan:** The note for your fifth session with any client (*including transfer clients*) will include a treatment plan. Please see instructions on how to do this in Titanium in the [documentation](#) section of this manual. Similar to progress notes, **treatment plans should be completed within one week.** You should discuss potential diagnoses and interventions with your supervisor prior to session five so that the treatment plan can be completed in Titanium within 24 hours. You must enter a diagnosis at session five; however, it can be “diagnosis deferred” if you plan to continue assessing psychopathology.

Step 4: If you have scheduled another appointment, be sure that you add it to your schedule in Titanium. If you have established a consistent schedule with your client, sessions can be scheduled as recurring appointments in Titanium. See the [documentation](#) section of this manual for instructions on how to schedule appointments in Titanium.

## CONDUCTING TELEHEALTH PSYCHOTHERAPY SESSIONS

Be early for your appointments. You should be at the Clinical Center no later than 15 minutes before your appointment time.

Telehealth appointments are conducted **from the Clinical Center** via Zoom for Business, which is HIPAA compliant. Each clinician should have their own Zoom for Business account. To obtain a HIPAA compliant Zoom account, consult with the Clinical Center director. Some notes about using Zoom for sessions:

- Zoom links for appointments are emailed to clients from their clinician 24 hours before the appointment. An email template for sending the Zoom link can be found in the Clinical Center OneDrive “Email Templates” folder.
- Zoom meetings for therapy appointments must have the waiting room feature enabled.
- The Zoom appointment should be titled [Your Initials] [Client Initials] (e.g., JD AA)
- Do **NOT** use blurring or other backgrounds on Zoom.

Go to the therapy room that you reserved through the front desk to set-up for the session (e.g., turn on the computer and login, log in to Zoom, adjust lighting).

Please note that therapy rooms are used by multiple clinicians throughout the day. **You**

**may not be able to access your room until right before your session as there may be a session in progress.** Please see the [rooms](#) section of this manual for policies regarding this.

When your client arrives in the Zoom waiting room for telehealth sessions, you are responsible for marking them as attended in Titanium. **Mark them as attended before letting them in to the Zoom meeting.** For information about how to do this, see the [documentation](#) section of this manual.

If the client arrives more than 10 minutes after their session was supposed to begin, the session should not proceed, you should close Zoom and they should be marked as a no-show. You should call the client later that day to talk about rescheduling.

### First Sessions and Paperwork

If it is your first session with the client (i.e., if they are a new client or a transfer client) the following paperwork must be completed at the beginning of the session. The forms are listed in the order it is recommended to review them. For information about completing paperwork, please see the [paperwork](#) section of this manual. The paperwork forms can be found on the Clinical Center website's resources page (<https://clinicalcenter.siu.edu/resources/>).

| New <u>TELEHEALTH</u> Psychotherapy Client  |
|---|
| 1. Consent to record (verbal consent) ( <i>begin recording after this form is completed</i> ) |
| 2. Telehealth clinician check   |
| 3. Informed consent for psychological services (verbal consent)                               |
| 4. Informed consent for telehealth (verbal consent)   |
| 5. Therapist-Client Agreement (verbal consent)  |

### Telehealth Recordings

All sessions must be recorded. If it is **NOT** your first session with a client, begin recording the session **before** you let your client in from virtual waiting room. If it **IS** your first session, begin the recording after you review the “informed consent to record” paperwork. This should be the first form you review with the client.

Recordings are made through the Zoom app. To record a session, click the “Record” button toward the bottom of the screen. If you do not see a “Record” button, click the “More” button (with three dots) and then click “Record.”

After the recording is stopped, the video will immediately start to convert, which takes several minutes. The recording then needs to be moved to your supervisor's folder through the following steps:

Step 1: Open the “Video Shares” folder on the desktop

Step 2: Open your supervisor's folder (e.g., “Holly Cormier”)

**Step 3:** There should be a folder within your supervisor's folder that has your name. Open this folder. If you do not have a folder, contact the Clinical Center director and your supervisor to have it added.

**Step 4:** When the video is finished recording, a window will open with three files. Drag and drop the video file into your folder (within your supervisor's folder). If the window does not open or if you accidentally close out of it, you can access the video by going to opening "File Explorer" then clicking on "Documents" and then "Zoom."

**Step 5:** Once in your supervisors folder, the video file should be named using the following format: [Your Last Name]\_[Client Initials] [Month.Day.Year (of the session)]

Example: Jones\_AA 1.1.2000

Videos then must be deleted from the computer:

**Step 1:** Open "File Explorer" then clicking on "Documents" and then "Zoom."

**Step 2:** Right click on the folder from your session and select "Delete."

**Step 3:** Right-click on the "Recycle Bin" (top right corner of the desktop) and select "Empty Recycle Bin." The computer will prompt you to make sure you are ready to empty the recycling bin. *NOTE* that if your video is not properly saved in your supervisor's folder it will be lost permanently after emptying the recycling bin! Click yes to finalize deleting the videos.

### In Session

Psychotherapy sessions are a maximum of 50-minutes in length. You should **aim to wrap up your sessions by 45 minutes** as it usually takes longer than you anticipate. This helps with clinic and room flow.

If you have concerns about a client's safety or you are concerned you may need to make a DCFS report, find a Clinical Center supervisor immediately. If you are debating whether the situation needs a supervisor, get the supervisor anyway. It is better safe than sorry! A supervisor will never be upset with you for interrupting them to check in about a client crisis.

### Post Session Tasks

**Step 1:** After finishing your session and moving your recordings, please ensure that it is reasonably neat, and all furniture is placed where it was before you entered.

**Step 2:** Move the recording to your supervisor's folder by following the instructions above.

### Progress Notes

**Step 3:** You are required to write a **progress note** after each session. **Notes must be completed within 24 hours of the session.** Please see the [documentation](#) section of this manual for information regarding how to write notes in Titanium.

**Fifth Session Treatment Plan:** The note for your fifth session with any client (*including transfer clients*) will include a treatment plan. Please see instructions on how to do this in Titanium in the [documentation](#) section of this manual. Similar progress notes, **treatment plans should be completed within one week.** You should discuss potential diagnoses and

interventions with your supervisor prior to session five so that the treatment plan can be completed in Titanium within 24 hours. You must enter a diagnosis at session five; however, it can be “diagnosis deferred” if you plan to continue assessing psychopathology.

Step 4: If you have scheduled another appointment, be sure that you add it to your schedule in Titanium. If you have established a consistent schedule with your client, sessions can be scheduled as recurring appointments in Titanium. See the [documentation](#) section of this manual for instructions on how to schedule appointments in Titanium.

## ATTENDANCE POLICY

As of Fall of 2022, the SIU Clinical Center is adopting a clinic-wide attendance policy that will be monitored and enforced. Therapy clients will be terminated if they meet *either* of the following:

- Go more than **one** month (4 weeks) without receiving services.
- Have **three or more** missed appointments of any kind within a 90-day period (i.e., cancellation without a reschedule, late cancellation, no show). Cancelled sessions that are rescheduled for the same week do not count toward this policy.

After a client has missed a session for any reason, the clinician must review the attendance policies with the client. The following note (i.e., phone/email contact *or* the next progress note) must indicate that the clinician has reiterated the above attendance policy with the client. The client may contact the Clinical Center if they wish to continue services. However, they must wait at least three months (90 days) and they will be re-added to the waitlist.

If the client has violated the attendance policy and is being terminated, they should be sent a letter. Templates for this letter can be found in the Clinical Center OneDrive “Letter Templates” folder. Please see the [paperwork](#) section of this manual for information about sending letters.

The case will then need to be closed. See the [closing cases](#) section of this manual (below) for information about how to do this.

## CLOSING CASES

Therapy cases can be closed (e.g., terminated) for a number of reasons: client violation of attendance policy, client finishes therapy, client moves away.

Whenever a case is closed, there are several steps that must be completed.

Step 1: First, you must write a closing report. For instructions on completing this task in Titanium, see the [documentation](#) section of this manual.

Step 2: Once the closing report is finalized and signed by your supervisor, check to make sure that all other notes in Titanium have been signed by all supervisors.

Step 3: Once all notes have been signed, email the Clinical Center director (i.e., Holly Cormier) and Tom Aken to let them know the case is ready to be closed. Include the client initials and ID number.

Step 4: You will need to remove the client from your client list. To do this, click “Open” in the top left corner of the screen. Then click “My Clients.” This will open a list of all your clients.

Step 5: Click “Terminate” on the far right-hand side of the row of the client you are closing. This will remove them from your client list.

## PSYCHOLOGICAL ASSESSMENTS

**COST:** Psychological assessments typically cost a total of \$1,000. Payments are made in two amounts. The first half of payment is due before the first appointment. The remaining half of payment is due prior to the feedback session where the client will get their assessment results.

- For SIUC students, assessments are discounted to a total of \$500 (\$250 paid at the first session, \$250 paid at the final feedback session).
- Some families qualify for reduced fee assessments through the Jackson County Grant. More information about this can be provided by Clinical Center staff.

### **ASSIGNING CASES**

For clients to begin assessment services at the Clinical Center, they must first meet with a clinician to do an assessment screening during which information about the client's background and presenting concern is collected. The Clinical Center GAs conduct assessment screenings. Even if the client is referred for an assessment by a Clinical Center clinician, they must still complete an assessment screening. Once an assessment screening is conducted and written up, clients are added to the waitlist with information about the presenting concerns. More information about conducting assessment screeners can be found in the [assessment screening](#) section of this manual.

After reviewing the waitlist, if you or your supervisor think that you should be assigned a particular assessment case, you and your supervisor will reach out to Dr. Cormier via email to request the assignment. Your email should include the client ID number and client initials.

Upon receiving your email, Dr. Cormier will email you and your supervisor that the client has been assigned to you. **You must attempt to make contact with that client within 24 hours of assignment.** All contact with clients should be made using the Clinical Center phone.

**EMAILING CLIENTS TO SCHEDULE IS NOT PERMITTED.** For information about how to make a call, see the [making calls](#) section of this manual. Any time you make a call to a client, a phone note must be added to Titanium. For information about adding phone notes to Titanium, please see the [documentation](#) section of this manual.

If the client answers your call, proceed to schedule with them via phone. Instructions for scheduling an appointment with your client can be found in the [scheduling a client](#) section of this manual. **Please review this section before making your call.**

If the client does not answer the call, you can leave a message informing them of who you are, that you are calling from SIU, and that you will leave placeholders on the schedule for them to call back and schedule with the front desk. Then you will need to go into Titanium and add placeholders to your schedule that reflect your availability. Please see the [documentation](#) section of this manual for steps to complete this.

If you have attempted to contact the client two times by phone within one week but are unable to contact them to schedule, please send the initiating services letter to the address in the client's

Clinical Center file. **The letter should be sent on the day of the second call.** The template for this letter can be found in the Clinical Center OneDrive “Email Template” folder. For more information about how to send letters, see the [paperwork](#) section of this manual.

If you do not hear from the client by the date indicated in the initiating services letter, please notify your supervisor, and proceed with closing the case. Information about closing cases can be found in the [closing cases](#) section of this manual.

## ASSESSMENT PAPERWORK

The following paperwork must be completed at the beginning of your first assessment appointment. The forms are listed in the order it is recommended to review them. For information about completing paperwork, please see the [paperwork](#) section of this manual. The paperwork forms can be found on the Clinical Center website’s resources page (<https://clinicalcenter.siu.edu/resources/>).

| First Appointment <u>VIRTUAL</u>   | First Appointment <u>IN PERSON</u>   |
|--|--|
| <ol style="list-style-type: none"> <li>1. Consent to record (verbal consent)</li> <li>2. Telehealth clinician check</li> <li>3. Authorization for Psychological Assessment, COVID Edition (verbal consent)</li> </ol>  | <ol style="list-style-type: none"> <li>1. Consent to record</li> <li>2. Authorization for Psychological Assessment, COVID Edition</li> </ol> |
| <p><b>Releases of Information (ROI):</b> If you need to speak with someone other than the client or their legal guardian (e.g., teacher, grandparent), you will need to get an ROI. Written signatures are required on ROIs, verbal consent is not permitted. For more information about ROIs, see the <a href="#">paperwork</a> section of this manual.</p> |  |

## SCHEDULING AN ASSESSMENT CLIENT

Before calling your client to schedule, please ensure that you have times ready to provide them that you are available to schedule a session.

- The time of your assessment appointment depends on what you are going to administer. Appointments can be scheduled on Monday/Wednesday between 8:00AM and 5:00PM (session ending at 5:00, so beginning at 4:00PM), Tuesday/Thursday between 8:00AM and 8:00PM (session ending at 8:00, so beginning at 7:00PM), **and** on Fridays between 8:00PM and 5:00PM.

Then call your client. For information about making calls, see the [making calls](#) section of this manual. When your client answers the phone, offer them your availability, and ask them what works best for them. Be sure to let them know whether the appointment will be occurring in person at the Clinical Center or virtually via telehealth. *Also remind them that the first half of payment will be due before your initial session begins.*

Once you have agreed upon a time for your session, complete a phone note in Titanium. For information about adding phone notes to Titanium, please see the [documentation](#) section of this manual.

After adding your phone note, you need to add the appointment to your schedule in Titanium. **It is critical that appointments are added to your Titanium schedule promptly for billing purposes.** Please see the [documentation](#) section of this manual for instructions on how to do this. When adding your assessment appointment to Titanium, there are several key things to remember to do:

- The following should be included in the “Description” box for these specific appointments:
  - For your **first appointment**, write “FIRST HALF DUE” in the description box
  - For the **feedback session**, write “FEEDBACK, SECOND HALF DUE” in the description box
  - For any **other testing appointments**, write “NO PAYMENT NEEDED” in the description box
  - You should also **note whether the appointment is in-person or virtual** as there is no separate appointment code for virtual psychological assessments in Titanium. Do this by writing “in-person” or “virtual” in the “Location” box.

After adding your appointment to Titanium, you must book a room for your appointment. For instructions on how to do this, please see the [rooms](#) section of this manual. Note that you should schedule an appropriately sized room if you have an in-person appointment. In-person assessment appointments have priority over large rooms.

### **Reserving Testing Materials**

You must also reserve the testing materials you need for the day of testing. Follow the steps below to do so. For more information about testing materials and how to acquire them, see the [assessment materials, scoring, and storage](#) section of this manual.

Step 1: On the main page of Titanium, click on the drop-down menu at the top of the screen that says, “Senior Staff.”

Step 2: Select “Rooms” from the list of options.

Step 3: Scroll over to the “Psych Assessment Schedule/Materials” column. Go to the day on this schedule that you have scheduled your testing appointment.

Step 4: Right click on the day and time that you would like to add the appointment. And hover over the “Add” button.

Step 5: Select “Placeholder for an Other Appointment.”

Step 6: A box will pop up asking if you would like to add the appointment to your schedule also. If you would like the placeholder to show on your schedule, click “Yes.” If you do not, click “No.”

Step 7: Select the “Note to self” code from the “Code” drop down menu.

Step 8: In the “Description” box, type your last name and any materials you will be using that day of testing (e.g., JONES, WAIS, TOVA, Laptop 1).

Step 9: Adjust the length of the appointment to be the appropriate time.

Step 10: Click “Save” in the top left corner of the window. Note that you CANNOT edit the appointment after clicking save.



## ASSESSMENT MATERIALS, SCORING, AND STORAGE

A complete list of all assessment measures that we have is located on the Clinical Center OneDrive in the “Assessment” folder. A copy of this list is also in the materials library on a bulletin board. The materials librarian or a GA can help answer questions about the various assessments.

In addition, there is an assessment resource manual with information that can be helpful when doing assessments. This manual can be found on the Clinical Center OneDrive in the “Assessment” folder. This manual contains copies of portions of the administration manuals for various assessment measures, which can be very helpful for you to be to access and review, without having to check out an entire kit or actual manual. It also contains information about interpretation.

**CHECKING OUT MATERIALS:** On the day of testing, go to the Material’s Library to check out materials that you have reserved (e.g., report forms, test kits, etc.). Give the staff member working in the Material’s Library a list of the items you need, and they will check them out for you.

**SCORING:** Some of our assessments require hand scoring, while others make use of online scoring platforms or scoring programs. With respect to online or computer scoring, there is a list in both the front of the assessment resource book as well as in the GA office 146C. It lists where various scoring programs are stored (i.e. which computers) and passwords.

**STORING MATERIALS:** When conducting assessments, you must either use a Clinical Center flash drive or One Drive to write your report. The method used depends on your supervisor’s preference. If you use a flash drive, it must stay locked in the clinic Materials Library when you leave the clinic. All paperwork and protocols related to assessments are kept in your clinic mailbox. You may need to take protocols to your supervisor for their review, but never have a client name on the protocol when doing this.

## REPORT WRITING

The style of the report you are writing and whether there is a template to work from will be different based on your supervisor. Supervisors also have different policies regarding turn-around time for report writing. **Reports must be stored either on One Drive or on a Clinical Center flash drive** (based on supervisor preference). Please consult with your supervisor at the time of case assignment about these things.

**In general, assessments should take between 4 and 6 weeks to complete.** This includes the final feedback meeting with your client. If there is some reason why you cannot complete the assessment within this time frame, please contact the director to discuss the issue(s).

## CLOSING ASSESSMENT CASES

Once you have met with your client for their feedback session, you must submit all protocols and forms that were used during the assessment for scanning. To do this, please complete the following steps:

- Add the client initials and ID number to the top right of all materials.
- Place the materials in alphabetical order.
- Complete the “Assessment To Do List” which can be found by the computer in the material’s library. This form will ask you to write down the hours you spent scoring and writing the report for your assessment.
- Place the “Assessment To Do List” on top of the materials and use a large rubber band to wrap all of the testing materials together.
- Place the materials face down in the scanning bin, located in the top drawer of the credenza behind the reception desk.

Similar to when a therapy case is closed, there are additional steps that must be completed.

Step 1: First, you must write a closing report. For instructions on completing this task in Titanium, see the [documentation](#) section of this manual.

Step 2: Once the closing report is finalized and signed by your supervisor, check to make sure that all other notes in Titanium have been signed by all supervisors.

Step 3: Once all notes have been signed, email the Clinical Center director (i.e., Holly Cormier) and Tom Aken to let them know the case is ready to be closed. Include the client initials and ID number.

Step 4: You will need to remove the client from your client list. To do this, click “Open” in the top left corner of the screen. Then click “My Clients.” This will open a list of all your clients.

Step 5: Click “Terminate” on the far right-hand side of the row of the client you are closing. This will remove them from your client list.

## MAKING CALLS

Clients should only be contacted via a Clinical Center phone. **DO NOT USE YOUR PERSONAL CELL PHONE OR EMAIL TO CONTACT CLIENTS.** To make phone calls, follow these steps:

Step 1: Check out the phone from the materials library. The phone is located in the bottom cabinet under the large supervisor mailboxes. If you have trouble locating the phone, the materials library worker would be happy to show you.

Step 2: Check the rooms computer to see what room is open for you to step into to make your call. The rooms computer is located to the left when you walk into the materials library.

Step 3: Fill out the information on the phone log clipboard in the materials library to denote who you will be calling (client initials and ID number), what time you checked the phone in/out, and what room you will be calling from. This clipboard with the phone log is located on the side of the cabinets to the right of the materials library desk.

- Please note that the phone log will be validated through the auditing system of client files by a Clinical Center GA to make sure that all logged calls have an associated note in Titanium *and* that all phone contact notes in Titanium have been made through a Clinical Center phone.

Step 4: Once you are in a room with the sound machine on, open Titanium and go to the client card for your client to access their phone number. For information about opening the client card, see the [documentation](#) section of this manual.

Step 5: Press one of the green line buttons on the phone. You will then hear a dial tone. The next steps will differ depending on what kind of call you are making.

To make a **local call**, press 9. Wait for the dial tone to resume and enter the client's phone number **without the area code**. Wait for the phone to start ringing (it takes a second).

To make a **long-distance call**, press 8. Wait for the dial tone to resume, then enter a long-distance code (10401). Wait for the dial tone to resume, then enter the client's phone number **with the area code**. Wait for the phone to start ringing (it takes a second).

Step 6: **Write a phone note in Titanium immediately after getting off the call**, even if you did not get an answer or just left a voicemail. For information about how to add a phone note in Titanium, see the [documentation](#) section of this manual.

## DOCUMENTATION

We have tried to keep required documentation to a minimum, but consistent documentation is required so that we are able to track each case (administrative need) and have an official record of what occurred in therapy (legal/ethical need). It is also important for students to learn critical documentation skills to use in future practice. Ultimately, the goal of all of this paperwork is to provide continuity of care to the client beginning when they initially call the Clinical Center continuing through and termination (and future contact with us or with another mental health facility).

The following need to be documented for **therapy cases**:

- Any contact with clients (i.e., phone notes)
- Any contact with clients that occurs through the front desk (e.g., cancellations, etc.)
- Progress notes (every session)
- Treatment plan (session five or earlier)
  - o Treatment plans also need to be completed with transfer clients
- Closing reports

The following need to be documented for **assessment cases**:

- Any contact with clients (i.e., phone notes)
- Any contact with clients that occurs through the front desk (e.g., cancellations, etc.)
- Progress notes (every appointment)
- Treatment plan (session five or earlier)
- Closing reports

It is important to check your task list on a weekly basis (at a minimum). Your progress notes, Treatment plans, closing reports, etc. may be sent back to you by your supervisor for revisions. It is your responsibility to regularly check task list to see if there are notes or corrections waiting for your review. Client files and task lists will be audited regularly to ensure students stay on top of their documentation.

The next several pages include the steps for completing various tasks in Titanium. This section is good to reference when you are learning to navigate the Titanium system!

### **NAVIGATING TO YOUR SCHEDULE**

Step 1: The default schedule shown when opening Titanium is the “Senior Staff” schedule. To see your own schedule, click on the drop-down menu at the top of the screen that says, “Senior Staff.”

Step 2: Select “Practicum – Clinical Psych” from the list of options.

Step 3: Scroll across and find your name. To see only your schedule for that week, double click your name at the top of the screen. Then click “OK.”

Step 4: To scroll through days or weeks on your calendar, use the +/- “Day” and/or “Week” buttons at the top left of the screen. Clicking the “Today” button will navigate you back to the current day.

## OPENING A CLIENT CARD

Step 1: Click “Open” in the top left corner of the screen. Then click “Clients.” You can also click “Control + C” to open the window to find clients.

Step 2: You will then be prompted to search for a client. To do this, enter your client’s first name, last name, client ID number, or other search criteria into the appropriate boxes. You do NOT need to fill out all the boxes. Then click “Find” or press the “Enter” key on the keyboard.

Step 3: Double click on your client. This will open their “Client Card.”

## ADDING AN APPOINTMENT

Step 1: Go to your schedule in Titanium.

Step 2: Right click on the day and time that you would like to add the appointment. And hover over the “Add” button.

Step 3: What you select next depends on what type of appointment you would like to add and whether you would like to schedule a one-time appointment or if you would like to have it repeat each week.

### One Time Appointments

To add an appointment with a client that you would like to occur **one time**:

Step 1: Click on “Individual Appointment.”

Step 2: You will then be prompted to select a client for the appointment. To do this, enter your client’s first name, last name, client ID number, or other search criteria into the appropriate boxes. You do NOT need to fill out all the boxes. Then click “Find” or press the “Enter” key on the keyboard. Then double click on your client.

Step 3: Within the “Code” drop-down menu, select the appropriate appointment code.

If you are scheduling an **in-person therapy session**, select “Individual – Psychotherapy.”

If you are scheduling a **telehealth session**, select “Individual Psychotherapy – Telehealth.”

If you are scheduling an **assessment session**, select “Psychological Assessment.”

Please also see the [assessment](#) section of this manual for additional information about scheduling assessment appointments.

Step 4: You can edit the date, time, and length of appointment by editing the appropriate boxes toward the top of the window.

*Note:* If you add something to the “Description” box, it can be viewed by everyone using Titanium, including the front desk. Things that could be included in this box include “check for payment,” etc. Information added into the “Comment” box can only be seen by you.

Step 5: If you would like to add the room number that you have reserved to your appointment, you can do so in the “Location” box. Note that this does NOT mean that you have reserved the room. To reserve a room, see the [rooms](#) section of this manual.

Step 6: Click “Save” in the top left corner of the window.

## Recurring Appointments

If you have a consistent time that you meet with clients each week, you can add repeating appointments in Titanium. To add **repeating appointments**:

Step 1: Click on “Recurring Individual Appointment Definition.”

Step 2: Follow Steps 2 through 5 from the [one-time appointments section](#) above to complete the appointment.

Step 3: Use the “Number in series” box to change the number of times the appointment will occur on the schedule. You can also add an end date to the recurring appointment using the “to date” box near the top left. You can also edit appointments to occur weekly, every other week, etc. by using the “Recur” drop down menu at the top of the window.

Step 4: Click “Save” in the top left corner of the window.

## Appointments with Multiple Clinicians

If you are scheduling a session that will include **multiple clinicians** (e.g., co-therapy appointments, co-assessments):

Step 1: Follow the steps above to schedule either a one-time or recurring appointment.

Step 2: Click on the “Scheduling” tab near the top of the window, next to the “Appointment Information” tab.

Step 3: Click on “Add/Select” on the right-hand side of the window.

Step 4: Search for the last name of the clinician you would like to add. Click the check box to the left of the name and then click “OK.”

Step 5: Click on the drop-down menu under “Role in appointment” and select “Organizer.” This will allow the person to edit the appointment and write notes.

Step 6: Click “Save” on the top left of the window. The appointments should now appear on both of your schedules.

## ADDING PLACEHOLDERS

Step 1: Go to your schedule in Titanium.

Step 2: Right click on the day and time that you would like to add the appointment. And hover over the “Add” button.

Step 3: Click on “Placeholder for Individual Appointment.”

Step 4: Next you will need to add a client to the appointment so that the front desk knows who the placeholder is for. To do this, first click “Select Client.”

Step 5: You will then be prompted to select a client for the appointment. To do this, enter your client’s first name, last name, client ID number, or other search criteria into the appropriate boxes. You do NOT need to fill out all the boxes. Then click “Find” or press the “Enter” key on the keyboard. Then double click on your client.

Step 6: Chose the appropriate appointment code from the “Code” drop down menu.

If your placeholder is for an **in-person therapy session**, select “Individual – Psychotherapy.”

If your placeholder is for a **telehealth session**, select “Individual Psychotherapy – Telehealth.”

If your placeholder is for an **assessment session**, select “Psychological Assessment.” Please also see the [assessment](#) section of this manual for additional information about scheduling assessment appointments.

**Step 7:** In the “Description” box, include any information you want the front desk to see when scheduling the appointment. Things included in the “Description” box of placeholders can include “confirm in person or telehealth,” “please schedule for 30-minute appointment,” etc.

Note: If you add something to the “Description” box, it can be viewed by everyone using Titanium, including the front desk. Things that could be included in this box include “check for payment,” etc. Information added into the “Comment” box can only be seen by you.

**Step 8:** When finished, click “Save” on the top left of the window.

**Step 9:** Placeholders can be added for all the availability you would like to provide for a client to schedule. To add more placeholders, repeat these steps. You can also add large blocks of time and specify in the description box how long the appointment should be scheduled for. For example, if you are free on Mondays from 10 until 5, you can put one placeholder on your schedule blocking off that time but include something like the following in the description box: “SCHEDULE FOR 1 HOUR APPOINTMENT.”

## CHANGING CLIENT ATTENDANCE FOR APPOINTMENTS

**Step 1:** Go to your schedule in Titanium. Find the appointment you would like to change the attendance for.

**Step 2:** Click on the appointment. Then click “Edit” in the top left-hand corner of the window.

**Step 3:** Click on the “Attendance” drop down menu to the right-hand side of the window. Select the appropriate attendance from the list:

“**Attended**” means the client attended the appointment.

“**Client no-show**” means the client did not attend the appointment and did not call to cancel ahead of time. If your client shows up past the 10-minute grace period, the session should not proceed, and they should be marked as a no-show.

“**Client cancelled**” means that the client cancelled a day or more before the appointment.

“**Client cancelled late**” means that the client cancelled their appointment on the same day it was supposed to be held.

## CHECKING YOUR TASK LIST AND EDITING NOTES

*It is critical that you check your task list regularly to see if notes have been sent back by supervisors. It is your responsibility to ensure that notes returned to you are edited in a timely manner.*

**Step 1:** Click “Open” in the top left corner of the screen. Then click “Task List.”

**Step 2:** Any notes that need action from you will appear on your task list. To open one, double click on the note.

**Step 3:** If the task has not been completed yet (e.g., if you have to add a progress note from a session), see the [adding progress notes](#) section of this manual for instructions on what to do.

**Step 4:** If the task is a note that was returned to you by a supervisor, you will need to edit the note. In the “Forward to note:” section, the supervisor should have left comments about what you need to edit.

Step 5: To edit a note, first remove your signature by clicking on the number “1:” box at the bottom left of the screen.

Step 6: Then edit the note according to your supervisor’s comments. It is often helpful to respond to each of your supervisors comments to note that you addressed them (e.g., writing “- Done. ”).

Step 8: Re-sign the note by clicking on the number “1:” box at the bottom left of the screen.

Step 9: Forward the note back to your supervisor by selecting your supervisor’s last name from the “Forward to:” drop down menu. Then click “Save” in the top left corner of the window.

## ADDING PHONE NOTES

*Every time a client makes contact with the Clinical Center, a phone note needs to be put into their file. It is your responsibility to ensure phone notes are included in the file, even when contact is made through the front desk.*

Step 1: First you will need to open the client file. You can do this by clicking “Open” in the top left corner of the screen. Then click “Clients.” You can also click “Control + C” to open the window to find clients.

Step 2: You will then be prompted to select a client for the appointment. To do this, enter your client’s first name, last name, client ID number, or other search criteria into the appropriate boxes. You do NOT need to fill out all the boxes. Then click “Find” or press the “Enter” key on the keyboard.

Step 3: Double click on your client. This will open their “Client Card.”

Step 4: Click on the “Client File” button at the top of the window.

Step 5: Click “New Note” at the top of the screen. A message will pop up asking if you are sure you want to create a new note that is not associated with an appointment. Click “Yes.”

Step 6: From the “Type of note” drop down menu, select “Phone Contact/Email.”

Step 7: Write your phone note.

Step 8: Then, sign the note by clicking on the number “1:” box at the bottom left of the screen.

Step 9: Forward the note to your supervisor by selecting your supervisor’s last name from the “Forward to:” drop down menu. Then click “Save” in the top left corner of the window.

Step 10: Check your task list regularly to see if your supervisor sent the note back to be edited. To edit notes sent back from your supervisor, first remove your signature by clicking on the number “1:” box at the bottom left of the screen. Then edit the note and complete Steps 8 through 9.

## ADDING PROGRESS NOTES

*Progress notes need to be completed after every session with a client. Notes should be completed within 24 hours of the session.*

Step 1: The easiest way to add a note for an appointment is through your task list. To access your task list, click “Open” in the top left corner of the screen. Then click “Task List.”

Step 2: Any notes that need action from you will appear on your task list. To open one, double click on the note.

Step 3: From the “Type of note” drop down menu, select the type of note you need to write.

If the note is for an **in-person therapy session**, select “Progress”

If the note is for an is for a **telehealth session**, select “Progress note – Telemental health”



If the note is for your **fifth therapy session and you need to complete a treatment plan**, select “Session 5 Treatment Plan - Psychotherapy.”

If the note is for an **assessment session**, select “Assessment Progress Note.”

Step 4: Write your note.

Step 5: Then, sign the note by clicking on the number “1:” box at the bottom left of the screen.

Step 6: Forward the note to your supervisor by selecting your supervisor’s last name from the “Forward to:” drop down menu. Then click “Save” in the top left corner of the window.

Step 7: Check your task list regularly to see if your supervisor sent the note back to be edited. To edit notes sent back from your supervisor, first remove your signature by clicking on the number “1:” box at the bottom left of the screen. Then edit the note and complete Steps 5 through 6.

### ADDING CLOSING NOTES

*When you finish services with a therapy or assessment client, a closing note needs to be written.*

Step 1: First you will need to open the client file. You can do this by clicking “Open” in the top left corner of the screen. Then click “Clients.” You can also click “Control + C” to open the window to find clients.

Step 2: You will then be prompted to select a client for the appointment. To do this, enter your client’s first name, last name, client ID number, or other search criteria into the appropriate boxes. You do NOT need to fill out all the boxes. Then click “Find” or press the “Enter” key on the keyboard.

Step 3: Double click on your client. This will open their “Client Card.”

Step 4: Click on the “Client File” button at the top of the window.

Step 5: Click “New Note” at the top of the screen. A message will pop up asking if you are sure you want to create a new note that is not associated with an appointment. Click “Yes.”

Step 6: From the “Type of note” drop down menu, select either “Closing Note – Psychotherapy” or “Closing Note – Psychological Assessment” (depending on the service you provided).

Step 7: Write your closing note.

Step 8: Then, sign the note by clicking on the number “1:” box at the bottom left of the screen.

Step 9: Forward the note to your supervisor by selecting your supervisor’s last name from the “Forward to:” drop down menu. Then click “Save” in the top left corner of the window.

Step 10: Check your task list regularly to see if your supervisor sent the note back to be edited. To edit notes sent back from your supervisor, first remove your signature by clicking on the number “1:” box at the bottom left of the screen. Then edit the note and complete Steps 8 through 9.

### ADDING A CLIENT TO THE WAITLIST

*After intakes and assessment screeners, clients must be added to the appropriate waitlist. Only clinicians with certain permissions (e.g., GAs) can do this.*

Step 1: Click “Open” in the top left corner of the screen. Then click “Clients.” You can also click “Control + C” to open the window to find clients.

Step 2: You will then be prompted to search for a client. To do this, enter the client’s first name, last name, client ID number, or other search criteria into the appropriate boxes. You do NOT need to fill out all the boxes. Then click “Find” or press the “Enter” key on the keyboard.

Step 3: Double click on your client. This will open their “Client Card.”

Step 4: At the top of the window, click “Waitlist.”

Step 5: Click on the drop-down menu under “New waitlist for this client” and select the appropriate wait list (e.g., Child Therapy, Adult Assessment).

Step 6: The “Referred Date” should be the date of their intake or screener. Under “Referral Comment” include a brief description of the client’s age and presenting concerns.

Step 7: On the right-hand side of the window, select the appropriate “Case Difficulty” from the drop-down menu.

Step 8: Next you will need to select the appropriate classifications of safety risk using the “Suicidal Risk” and “Homicide Risk” drop down menus.

Step 9: In the “Age” drop down menu, select the client’s age range.

Step 10: Click “Save” in the top left corner of the window. This will send the client to the appropriate wait list. *Note that you cannot edit the waitlist entry after it has been saved.*

## ROOMS

There are 12 rooms in our clinic. Rooms can be used for therapy, assessment, supervision, and other purposes but **MUST** be reserved before use. **Never enter a room at the Clinical Center if the door is closed, EVEN if you think you have the room reserved.**

### **RESERVING AND RELEASING ROOMS**

Rooms must be booked at least the day before they need to be used. To reserve a room, complete the following steps:

Step 1: You will need to check Titanium for room availability. One way to do this is by checking the computer in the Material's Library. This computer (on the left right when you walk in the door of the Material's Library) always has the room schedule displayed. You can also access the room schedule on your own Titanium by clicking on the drop-down menu at the top of the main Titanium screen that says, "Senior Staff" and selecting "Rooms" from the list of options.

Step 2: Once you have verified that a room is available, get a purple room request slip. These can be found in all the therapy rooms and by the computer in the Material's Library.

Step 3: Fill out the room request form completely.

Step 4: Submit the form to the material's librarian. They will add the request to Titanium.

Rooms that will not be used **must** be released to ensure there is enough space for clients to be seen at the clinic. To release a room, complete the following steps:

Step 1: Get a green room release form. These can be found in all the therapy rooms and by the computer in the Material's Library.

Step 3: Fill out the room release form completely.

Step 4: Submit the form to the material's librarian. They will remove your reservation from Titanium.

Room reservations will be audited weekly. If you have a room reserved without an appointment in your schedule, you will be notified and given 24 hours to rectify the error before the room reservation is released for you.

### **KNOCK POLICY**

It is very important that you **NEVER enter a room at the Clinical Center if the door is closed, EVEN if you think you have the room reserved.** This is for privacy purposes.

If a room you have reserved is in use, first, double check that you do in fact have that room reserved. You can do this by looking at room reservations on the computer in the materials library or on your own titanium schedule.

If you do in fact have the room reserved at that time, knock gently at **8 minutes to the hour.** If at

**5 minutes to the hour** the room has not been vacated or the clinician has not come to the door, knock gently again. If the clinician does not come to the door they are likely inside is dealing with a crisis. In this case, you should go to the front desk and ask for help finding another room if possible.

As a clinician, if you are in the room and you hear a knock because your time is up, begin to wrap up the session. If you are in a crisis situation with your client, respond to the knock by going to the door. Open it slightly, protecting the privacy of your client, and inform the person who has knocked that you cannot vacate the room. **This should only happen when there is a clinical crisis.** Otherwise, it is your responsibility to maintain good boundaries around session time limits with all clients. **Aim to wrap up sessions by 45 minutes to avoid running over time.**

If you have clients who consistently push the boundaries of session time limits, it is a therapeutic issue that needs to be addressed early. Consult with your supervisor and/or the Clinical Center director if this becomes an issue.

## CLINIC ROOMS AND THEIR USES

The following rooms are large clinic rooms. **Psychological assessments and in-person couples and family sessions get priority for these rooms.** If you have one of these rooms reserved and a higher priority case needs the room, you will be informed by the front desk that you have been switched to another room for that week: **140D, 140E, 140F** (*window observation*), **145B** (*playroom; window observation*), **145D** (*playroom; window observation*), **145F** (*window observation*).

The following rooms are smaller clinic rooms. Telehealth session should be booked in these rooms whenever possible: **140B, 140C, 140G, 147, 145A, 145G**

The Clinical Center also has a large group room that can only be reserved for specific purposes (e.g., group therapy, vertical team supervision). This room must be booked through the Clinical Center director.

## GENERAL THINGS

Before leaving a room, please make sure that it is reasonably neat (e.g., no trash on the floor, tables and chairs in good order, etc.). This is simple courtesy to others.

If something appears to be broken or particularly messy, be sure to let a Clinical Center staff member someone know (e.g., GA, receptionist, Tom Aken) if something is not working properly. If you don't report it, we won't know to fix it.

## PAPERWORK

### LIST OF FORMS

The following paperwork is required for services. The forms are listed in the order in which it is recommended to review them. The paperwork forms can be found on the Clinical Center website's resources page (<https://clinicalcenter.siu.edu/resources/>).

|  |   |
|--|---|
| <b>Intake <u>VIRTUAL</u></b>   | <b>Intake <u>IN PERSON</u></b>  |
| <ol style="list-style-type: none"> <li>1. Consent to record (verbal consent)</li> <li>2. Telehealth clinician check</li> <li>3. HIPPA (verbal consent)</li> <li>4. Informed consent for treatment (verbal consent)</li> <li>5. Informed consent for telehealth (verbal consent)</li> </ol>                                   | <ol style="list-style-type: none"> <li>1. Consent to record</li> <li>2. HIPPA</li> <li>3. Informed consent for treatment</li> </ol>   |
| <b>Assessment Screening <u>VIRTUAL</u></b>   | <b>Assessment Screening <u>IN PERSON</u></b>  |
| <ol style="list-style-type: none"> <li>1. HIPPA (verbal consent)</li> <li>2. Telehealth clinician check</li> <li>3. Authorization for Psychological Assessment, COVID Addition (verbal consent)</li> </ol>   | <ol style="list-style-type: none"> <li>1. HIPPA</li> <li>2. Authorization for Psychological Assessment, COVID Addition</li> </ol>   |
| <b>Psychotherapy <u>VIRTUAL</u></b>  | <b>Psychotherapy <u>IN PERSON</u></b>   |
| <ol style="list-style-type: none"> <li>1. Consent to record (verbal consent)</li> <li>2. Telehealth clinician check</li> <li>3. Informed consent for psychological services (verbal consent)</li> <li>4. Informed consent for telehealth (verbal consent)</li> <li>5. Therapist-Client Agreement (verbal consent)</li> </ol> | <ol style="list-style-type: none"> <li>1. Consent to record</li> <li>2. Informed consent for psychological services</li> <li>3. Informed consent for telehealth</li> <li>4. Therapist-Client Agreement</li> </ol> |
| <b>Psychological Assessment, First Appointment <u>VIRTUAL</u></b>  | <b>Psychological Assessment, First Appointment <u>IN PERSON</u></b>   |
| <ol style="list-style-type: none"> <li>1. Consent to record (verbal consent)</li> <li>2. Telehealth clinician check</li> <li>3. Authorization for Psychological Assessment, COVID Addition (verbal consent)</li> </ol>   | <ol style="list-style-type: none"> <li>1. Consent to record</li> <li>2. Authorization for Psychological Assessment, COVID Addition</li> </ol>   |

### Other Forms

**Releases of Information (ROI):** If you need to speak with someone other than your client or their legal guardian (e.g., teacher, grandparent), you will need to get an ROI. Written signatures are required on ROIs, verbal consent is not permitted.

## CONSENTING TO SERVICES FOR CHILD CLIENTS

The legal guardian of children under age 12 must provide consent. Otherwise, the child cannot be served. If children are age 12 or older, we obtain consent from both the parent and the child. If the child is age 12 or older, the state of Illinois allows us to provide outpatient services without guardian consent for up to 5 sessions lasting no more than 50 minutes. The parent/guardian is not liable for any fees for the service and, unless the Clinical Center director deems it necessary, the parent/guardian is NOT to be informed that the adolescent is receiving counseling. For persons 18 years old or older, no parental/guardian consent is necessary unless such person is under a specific court-appointed legal guardianship.

If the youth's guardians are divorced, we must have a copy of the guardian's custody agreement that states the consenting parent has legal medical and psychological decision-making power for the child on file at the Clinical Center. This paperwork must be obtained before proceeding with therapy or assessment services.

## COMPLETING AND SUBMITTING PAPERWORK

**For in person appointments**, the clinician talks through the forms listed above in their recommended order and obtains written consent from the client and/or their legal guardian on each form. After the appointment is completed, the clinician will print out the forms and submit them to the scan basket for scanning. The scan basket is located in the top drawer of the table behind the front desk (under the printer). Client information should be placed face down in the basket.

**For virtual appointments**, the clinician will have each form pulled up on their computer. They will share their screen via Zoom and talk through each form with the client. The client and/or their legal guardian will provide verbal consent for each form. After the appointment is completed, the clinician will email the verbal consent forms to the client. The template for this email is included in the Clinical Center OneDrive "Email Templates" folder. After emailing the forms, the clinician will then print out the forms and submit them to the scan basket for scanning. The scan basket is located in the top drawer of the table behind the front desk (under the printer). Client information should be placed face down in the basket.

## SENDING LETTERS

Letters are sent to clients if they have been assigned to a clinician but fail to call and initiate services OR if they have violated the attendance policy and their file is being closed.

If you need to send a letter to a client, please use the appropriate letter template to draft your letter. Templates for these letters can be found in the Clinical Center OneDrive "Letter Templates" folder. Then complete the following steps:

Step 1: Print two copies of the letter on a Clinical Center letterhead. These can be found in the top drawer of the table behind the front desk (under the printer).

Step 2: Address a Clinical Center envelope to the address in your client's file. Envelopes are found in the same locations as Clinical Center letterheads.

Step 3: Put one copy of letter in the envelope and close it. Then place it face-down in the outgoing mail basket. This is located next to the printer behind the front desk.

Step 4: In the top right corner of the second copy of the letter, write the client's initials and client ID number. Then place the copy face down in the scan basket to be scanned into the client's Clinical Center file. The scan basket is located in the top drawer of the table behind the front desk (under the printer).

## INTAKES

For clients to begin therapy at the Clinical Center, they must first attend an intake appointment. During the intake appointment, the clinician gathers information about the client's presenting concerns and background.

GAs conduct the intakes for the Clinical Center. If another student is interested in doing intakes, they must reach out to the Clinical Center director and go through intake training. Intake training consists of 1) observing an intake conducted by a trained clinician and writing up the intake note for the trained clinician to review, 2) co-conducting an intake with a trained clinician and writing up the note, and 3) continuing to co-conduct intakes and have the notes reviewed until you are approved to conduct them on your own.

### SCHEDULING INTAKES

GAs and anyone else conducting intakes will have intake placeholders on their schedule each week. When someone calls the front desk requesting an intake, the receptionist will schedule the intake in one of the placeholders, book a room for you, and send you an email informing you of the appointment. It is recommended, though, that you check your schedule regularly to see whether your intake slots have been filled.

### INTAKE PROCEDURES

Be early for your appointments. You should be at the Clinical Center no later than 15 minutes before your appointment time.

Intakes are typically conducted via telehealth. Telehealth appointments are conducted **from the Clinical Center** via Zoom for Business, which is HIPAA compliant. Each clinician should have their own Zoom for Business account. To obtain a HIPAA compliant Zoom account, consult with the Clinical Center director. Some notes about using Zoom for appointments:

- Zoom links for appointments are emailed to clients from their clinician 24 hours before the appointment. An email template for sending the Zoom link for intakes can be found in the Clinical Center OneDrive "Email Templates" folder.
- Zoom meetings for appointments must have the waiting room feature enabled.
- The Zoom appointment should be titled [Your Initials] [Client Initials] (e.g., JD AA)
- Do **NOT** use blurring or other backgrounds on Zoom.

Go to the therapy room that was reserved for you through the front desk to set-up for the session (e.g., turn on the computer and login, log in to Zoom, adjust lighting).

Please note that therapy rooms are used by multiple clinicians throughout the day. **You may not be able to access your room until right before your session as there may be a session in progress.** Please see the [rooms](#) section of this manual for policies regarding this.

When your client arrives in the Zoom waiting room for the intake appointment, you are



responsible for marking them as attended in Titanium. **Mark them as attended before letting them in to the Zoom meeting.** For information about how to do this, see the [documentation](#) section of this manual.

### Intake Paperwork

The following paperwork must be completed at the beginning of the intake appointment. For additional information about completing paperwork, see the [paperwork](#) section of this manual. The paperwork forms can be found on the Clinical Center website's resources page (<https://clinicalcenter.siu.edu/resources/>).

| Intake Paperwork  |
|---|
| <ol style="list-style-type: none"> <li>1. Consent to record (verbal consent; <i>begin recording after this form is completed</i>)</li> <li>2. Telehealth clinician check (not needed if appointment is in person)</li> <li>3. HIPPA (verbal consent)</li> <li>4. Informed consent for treatment</li> <li>5. Informed consent for telehealth (verbal consent)</li> </ol> |

### Telehealth Recordings

All intakes must be recorded. Begin recording the intake after you review the “informed consent to record” paperwork. This should be the first form you review with the client.

Recordings are made through the Zoom app. To record a session, follow these steps.

Step 1: Open the “Video Shares” folder on the desktop

Step 2: Open your supervisor’s folder (e.g., “Holly Cormier”)

Step 3: There should be a folder within your supervisor’s folder that has your name. Open this folder. If you do not have a folder, contact the Clinical Center director and your supervisor to have it added.

Step 4: When the video is finished recording, a window will open with three files. Drag and drop the video file into your folder (within your supervisor’s folder). If the window does not open or if you accidentally close out of it, you can access the video by going to opening “File Explorer” then clicking on “Documents” and then “Zoom.”

Step 5: Once in your supervisors folder, the video file should be named using the following format: [Your Last Name]\_[Client Initials] [Month.Day.Year (of the session)]

Example: Jones\_AA 1.1.2000

Videos then must be deleted from the computer:

Step 1: Open “File Explorer” then clicking on “Documents” and then “Zoom.”

Step 2: Right click on the folder from your session and select “Delete.”

Step 3: Right-click on the “Recycle Bin” (top right corner of the desktop) and select “Empty Recycle Bin.” The computer will prompt you to make sure you are ready to empty

the recycling bin. *NOTE* that if your video is not properly saved in your supervisor's folder it will be lost permanently after emptying the recycling bin! Click yes to finalize deleting the videos.

### Conducting Intake Appointments

Intake appointments are scheduled to be two hours; however, they should be completed within 90 minutes.

During the intake appointment, you should use the appropriate intake note template in Titanium to guide the interview (i.e., "Intake – Personal – Adult," "Intake – Personal – Family," "Intake – Personal – Child/Adolescent," or "Intake – Personal – Couples"). You should also take comprehensive notes. Notes can be taken on paper (using a printed-out version of the intake interview), directly within the Titanium note, or on a One Drive Word document.

At the end of each intake before letting the client leave, you must check in with a Clinical Center supervisor. Knock on a supervisor's door and give the an overview of the intake information (including safety concerns). If there are serious safety concerns, supervisors often come into the appointment to check in with the client.

### Post Session Tasks

Step 1: After finishing your session and moving your recordings, please ensure that it is reasonably neat, and all furniture is placed where it was before you entered.

Step 2: Move the recording to your Dr. Clark's folder by following the instructions above.

Step 3: Add the intake client to the waitlist. Please see the [documentation](#) section of this manual for information regarding how to do this.

Step 4: You are required to write an **intake note** after the appointment. **The note must be completed within 24 hours of the appointment.** Please see the [documentation](#) section of this manual for information regarding how to write notes in Titanium. Specific things about notes for intakes include:

- Choose the appropriate note template to write your note: "Intake – Personal – Adult," "Intake – Personal – Family," "Intake – Personal – Child/Adolescent," or "Intake – Personal – Couples"
- Intake notes should be forwarded to Dr. Cindy Clark.

## ASSESSMENT SCREENERS

For clients to begin the assessment process at the Clinical Center, they must first attend an assessment screening appointment. During the intake appointment, the clinician gathers information about the client's presenting concerns and background. GAs conduct the intakes for the Clinical Center.

### **SCHEDULING ASSESSMENT SCREENINGS**

GAs and anyone else conducting assessment screenings will have assessment screening placeholders on their schedule each week. When someone calls the front desk requesting an assessment, the receptionist will schedule the screener in one of the placeholders, book a room for you, and send you an email informing you of the appointment. It is recommended, though, that you check you schedule regularly to see whether your assessment screening slots have been filled.

### **ASSESSMENT SCREENING PROCEDURES**

Be early for your appointments. You should be at the Clinical Center no later than 15 minutes before your appointment time.

Assessment screeners are typically conducted via telehealth. Telehealth appointments are conducted **from the Clinical Center** via Zoom for Business, which is HIPAA compliant. Each clinician should have their own Zoom for Business account. To obtain a HIPAA compliant Zoom account, consult with the Clinical Center director. Some notes about using Zoom for appointments:

- Zoom links for appointments are emailed to clients from their clinician 24 hours before the appointment. An email template for sending the Zoom link for assessment screeners can be found in the Clinical Center OneDrive "Email Templates" folder.
- Zoom meetings for appointments must have the waiting room feature enabled.
- The Zoom appointment should be titled [Your Initials] [Client Initials] (e.g., JD AA)
- Do **NOT** use blurring or other backgrounds on Zoom.

Go to the therapy room that was reserved for you through the front desk to set-up for the screener (e.g., turn on the computer and login, log in to Zoom, adjust lighting).

Please note that rooms are used by multiple clinicians throughout the day. **You may not be able to access your room until right before your session as there may be a session in progress.** Please see the [rooms](#) section of this manual for policies regarding this.

When your client arrives in the Zoom waiting room for the assessment screening appointment, you are responsible for marking them as attended in Titanium. **Mark them as attended before letting them in to the Zoom meeting.** For information about how to do this, see the [documentation](#) section of this manual.

### Assessment Screening Paperwork

The following paperwork must be completed at the beginning of the assessment screening appointment. For additional information about completing paperwork, see the [paperwork](#) section of this manual. The paperwork forms can be found on the Clinical Center website's resources page (<https://clinicalcenter.siu.edu/resources/>).

| Assessment Screening Paperwork   |
|--|
| <ol style="list-style-type: none"> <li>1. HIPPA (verbal consent)</li> <li>2. Telehealth clinician check (not needed if appointment is in person)</li> <li>3. Authorization for Psychological Assessment, COVID Edition (verbal consent)</li> </ol> |

### Conducting Assessment Screening Appointments

Assessment screenings are NOT recorded. Assessment screening appointments are scheduled to be one hour.

During the assessment screening appointment, you should use the assessment screening note template in Titanium to guide the interview (i.e., “In Person Screen Assessment – Psych Eval”). You should also take comprehensive notes. Notes can be taken on paper (using a printed-out version of the assessment screening interview), directly within the Titanium note, or on a One Drive Word document.

You do NOT need to check in with a supervisor at the end of assessment screening appointments unless you have any safety concerns.

### Post Appointment Tasks

**Step 1:** After finishing your appointment, please ensure that it is reasonably neat and all furniture is placed where it was before you entered.

**Step 2:** Add the assessment client to the waitlist. Add the intake client to the waitlist. Please see the [documentation](#) section of this manual for information regarding how to do this.

**Step 3:** You are required to write an **assessment screening note** after the appointment. **The note must be completed within 24 hours of the appointment.** Please see the [documentation](#) section of this manual for information regarding how to write notes in Titanium. Specific things about notes for intakes include:

- Choose the “In Person Screen Assessment – Psych Eval” note template.
- Assessment screening notes should be forwarded to Dr. Holly Cormier.

## BILLING

### CPT CODES

CPT stands for Current Procedural Terminology and consists of “a set of codes, descriptions, and guidelines intended to describe procedures and services performed by physicians and other health care providers. Each procedure or service is identified with a five-digit code. The use of CPT codes simplifies the reporting of services” (see American Medical Association, *CPT 2006*, p. xiii).

One of the primary reasons for using a CPT code is to describe the service uniformly; specifically, two services in two separate states that report the same CPT code are reporting the same service regardless of whether they are calling one therapy and the other counseling. This uniformity or consistency in naming a service appeals to any billing agency in that they do not have to determine what the service is they are paying for. Thus, it is not surprising that private insurance companies and Medicare use these codes for billing. Since we follow Medicare procedures, we use the CPT codes.

For the most part CPT codes are self-explanatory. For example, couples psychotherapy is counseling of a couple such as marital or partner therapy. Psychotherapy, office, 45 minutes is an individual therapy session lasting for 45-50 minutes. Some services are billed by the hour such as psychological testing. A few of the terms may seem odd; for example, environmental consultation is defined as “environmental intervention for medical management purposes on a patient’s behalf with agencies, employers, or institutions” (p. 295) that we may use for attending meetings on behalf of a client such as a school IEP meeting. Another example is psychotherapy, interactive, office, 20-30 minutes. This is described as “individual psychotherapy, interactive, using play equipment, physical devices, interpreter, or other mechanisms of non-verbal communication” (p. 294) for 20-30 minutes.

Other services such as psychotherapy, office, are billed by the amount of face-to-face service. We **do not** bill in those cases for writing progress notes, etc. Also, please be aware that the typical session is 45 to 50 minutes with the patient. For all of the therapy codes we bill only for face-to-face time and **NOT for phone sessions or any paperwork**. For psychological assessments we bill for all face-to-face time, test scoring, test interpretation, report preparation, and feedback (see section on billing for psychological assessment).

### BILLING CODES FOR ASSESSMENT

Psych Assessment Performed by a Licensed Clinical Psychologist (96101): Includes face to face time administering assessments and interviews and time spent in interpreting results and preparing a report of the findings and recommendations by a qualified health care professional. It includes feedback session(s).

Psychological Assessments Performed by a Clinician (96102): Includes face to face time

administering assessments and interviews and time spent in interpreting results and preparing a report of the findings and recommendations by a qualified health care professional. It includes feedback session(s).

Psychological Computer Assessment (96103): Assessment is completed on a computer and we bill only for the time of Assessment.

Neuro-Psychological Testing (96119): Includes face to face time administering Assessments and interviews and time spent in interpreting results and preparing a report of the findings and recommendations by a qualified health care professional. It includes feedback session(s).

Neuro-Psychological Computer Assessments (96120): Assessment is completed on a computer and we bill only for the time of Assessment.

*Note: We estimate that full assessment batteries will take about 10-12 hours to complete. Clients will never be billed beyond 10 hours, so the maximum amount any client will pay for assessment is \$1000.00.*