

FOOTHILLS GATEWAY, INC.

SummitStone Health Partners

REFERRAL PROCESS:

1. The Interdisciplinary Team (IDT) will determine that the individuals may need mental health services and/or annual review of psychotropic medications.
2. The Program Approved Service Agency (PASA) will gather medical, behavioral, psychological and social information (including medical history, medication sheet, family medical history, mental health history, developmental history) and submit this information to the FGI Case Manager (CM). The FGI CM will prepare a SummitStone fact sheet and compile the information listed above into a referral packet for a new Annual Medication Review, or Open SummitStone individual and submit to the Housing Coordinator. If the individual is in Supported Living Services (SLS) or on the Waiting List, the FGI CM will assure all individual information required for referral, as outlined above, is included in the referral packet.

Returning Annuals who have been placed on the Psychiatrist's schedule but do not have the supporting documentation submitted to the FGI Housing Coordinator at least one week prior to the appointment, will be rescheduled. The supporting documentation required for returning Annuals includes updated medical and behavioral information, an updated fact sheet, an updated medication sheet and a SummitStone referral form. For Therapy Only Referrals, referral information needed is the same as it is for Open individual referrals to the SummitStone Psychiatrist.

The SummitStone lead therapist will assign the person to a therapist. The emergent nature of the situation will be taken into consideration in scheduling appointments per recommendation from the Case Management Coordinator. The CM Coordinator will consult with the lead therapist if there is an emergent need that constitutes a switch of appointment times.

After the initial intake, a person may become a client of SummitStone if SummitStone determines that the person has a targeted mental health diagnosis and that the treatment is medically necessary.

Medication evaluations are time limited and SummitStone's policy is that if an individual is more than 10 minutes late for the appointment, the appointment will be rescheduled for another day.

POINT OF CONTACT/RESPONSIBILITIES:

All mental health services are accessed through the primary therapist, whether that primary therapist is a SummitStone therapist or an External Provider Network (EPN) therapist. If that person is unavailable, and it is an urgent situation that cannot wait for the primary therapist's return, then one of the other SummitStone therapists should be contacted. This is true for all mental health services. **Do not** go directly to the SummitStone Psychiatrist or

Psychiatric Nurse Practitioner for any reason. If an individual needs SummitStone medical staff services, the SummitStone therapist will make that determination and the arrangements.

SCHEDULING

A schedule for all SummitStone appointments with the Psychiatrist and/or Psychiatric Nurse will be developed by the FGI Housing Coordinator and a SummitStone liaison and distributed weekly to FGI CMs, the Director of Resource Coordination and Development, Case Management Coordinators, and the SummitStone therapists. Individual schedules for individuals in Comprehensive services will be given to each PASA for the person in that PASA's services. FGI CMs will inform the parents/guardians and individuals in regard to scheduled appointments. If an FGI CM or PASA representative is unable to attend, it is his/her responsibility to find someone to cover the appointment and to assure the replacement will familiarize themselves with the information needed before attempting to reschedule. Regularly scheduled appointments will occur for therapy, monitoring of ongoing treatment, and maintaining stability for some SummitStone individuals. However, due to an individual's activities and needs, there must be some flexibility. It is very important that scheduled appointments are kept. It is difficult to reschedule due to limited Psychiatrist's/Psychiatric Nurse's time. However, if an appointment must be rescheduled, the FGI CM should be contacted, and they will then coordinate rescheduling with the SummitStone therapist.

EMERGENCY CONSULTATION

Services provided by the SummitStone medical staff are scheduled in advance and SummitStone has an interest in providing the best possible care for individuals at FGI. SummitStone now maintains one open appointment each week to be used for emergencies that may present or to use as consultation time if needed. In order to provide the best continuity of care for individuals, SummitStone will no longer "bump" individual's on a routine basis in order to move up other individuals medication evaluations. At every medication evaluation the next appointment is scheduled. If at that time the team is concerned that it is scheduled too far out, the IDT can express that concern at that time. If an individual who has previously been stable exhibits an increase in symptoms prior to the next scheduled appointment, the Case Manager will contact the primary therapist to consult. This procedure does not include the annuals and intakes. If one of these individuals needs to be "bumped" in order for another FGI individual to be evaluated earlier, SummitStone will continue to work with FGI Case Managers to ensure that those individuals will be seen as soon can be arranged.

The emergency/case consult time slot will not be filled prior to the week before a scheduled medication evaluation day as this time is being maintained to provide for true emergencies or urgent situations. It should not be viewed as a routine medication evaluation time slot to be used for regularly scheduled appointments. The SummitStone therapist will make the determination whether an individual's situation is an emergency, urgent, or otherwise. For this reason, it is extremely important to keep the SummitStone therapist apprised of the individual's current status in regards to symptoms and behaviors. **This is also why it is important for therapists to be invited to annual Service Plans (SPs) and IDTs or be notified if any IDT, which was scheduled for the individual, has changed (except in the case of a**

SummitStone individual classed as “Meds Only”), unless they are having significant mental health issues.

The PASA is responsible for transporting the individual to appointments, unless other arrangements have been made with the FGI CM. All appointments will be at Foothills Gateway, Inc. unless otherwise specified on specific individuals by the SummitStone therapist in conjunction with the SummitStone lead therapist. For SLS programs, it is the FGI CM's responsibility to provide or arrange for transportation according to the IDT recommendations.

The FGI CM will ensure that the SummitStone therapist is kept informed of all non-mental health related changes experienced by the individual and the SummitStone therapist will ensure that the FGI CM is kept informed of all mental health related changes experienced by individual.

If a physician requests SummitStone to take over psychiatric treatment, the request must be made in writing.

The FGI Case manager is considered the facilitator of the IDT, and as such, he/she is the point of contact for all information flowing to and from SummitStone.

The SummitStone Psychiatrist or Psychiatric Nurse Practitioner is the facilitator for medication evaluations.

Emergency medical case consults are always done with SummitStone medical staff, the SummitStone therapist, and the FGI Case Manager. For a consultation with the SummitStone Psychiatrist, the FGI CM will bring the request to one of the SummitStone therapists who will in turn make arrangements with the Psychiatrist for this appointment. Please keep in mind that a case consult is not an IDT, it is a chance to discuss, briefly, with the psychiatric medical staff, concerns, questions, or problems that have arisen that need to be addressed prior to the next scheduled medication evaluation. Consults are scheduled in advance so that SummitStone staff can bring the individual's chart to FGI in order for the psychiatric medical staff to have all of the records available to them so that they are prepared to best answer questions brought to the consult. During a mental health emergency, the SummitStone therapist will take the lead and act as liaison between the mental health systems and the FGI CM and IDT.

AFTER HOURS MENTAL HEALTH SERVICES:

If an individual or staff person needs to talk to a therapist after normal business hours, the individual and/or staff person can call the SummitStone main number, 970-494-4200, and then will be switched to a therapist for a brief consult. Individuals or staff who call should be prepared to state the problem and follow direction from the therapist. Whenever possible, hospitalizations should be taking place through Poudre Valley Hospital (PVH) or Medical Center of the Rockies (MCR) Emergency Room (ER). If an assessment for possible hospitalization is needed after normal business hours, the individual should be taken directly to Community Crisis Clinic. If the person is combative, heavily intoxicated or an elopement risk, 911 should be called or the person taken to the ER. Loveland and Estes

Park individuals should be taken to the nearest available ER. During normal business hours, contact the SummitStone therapist who will determine if the individual should go to the ER or the Community Crisis Clinic.

ABSENCE OF SUMMITSTONE THERAPIST:

When a SummitStone therapist will be absent from FGI, the following procedure will be followed:

- i. Before leaving, the therapist will notify the Front Desk at FGI and an alternative SummitStone therapist will be assigned for coverage if necessary.
- ii. The SummitStone therapist who is notified will contact the Comprehensive Case Management Coordinator by calling her desk or cell phone to inform her of the absence of that therapist. The Case Management Coordinator will communicate with those who need to know should a CM be out.
- iii. FGI CMs will notify individuals and team members as necessary.
- iv. The SummitStone therapist who is absent will make arrangements to reschedule those individuals upon his or her return to work.

DOCUMENTATION PROVIDED BY SUMMITSTONE AND TO SUMMITSTONE:

Copies of individual's SummitStone treatment plans will be provided to FGI bi-annually. SummitStone will give these to the FGI Housing Coordinator who will disseminate to FGI CMs and to PASAs.

Copies of medication evaluation progress notes that include the primary diagnosis and signature of the SummitStone Psychiatrist, will be provided weekly to the FGI Housing Coordinator who will in turn disseminate these to FGI CMs and to PASAs. The FGI Housing Coordinator will track notes and reports received and distributed. The SummitStone psychiatrist's signature on these will suffice for documentation of medical necessity for the advised course of treatment.

For individuals in comprehensive services, the PASA is responsible for assuring that requested information is completed and submitted to SummitStone (i.e. blood work, hospital records, etc.). For individuals in Supported Living Services, this will be decided by the IDT.

SummitStone therapists may make home visits with SummitStone individuals depending on the needs of the individuals and the availability of therapists' time to do so. SummitStone therapists will need to schedule home visits with residential support staff prior to the visit. SummitStone therapists may observe individuals at day program sites as necessary to monitor and evaluate medication effectiveness and side effects. This will increase SummitStone therapist's ability to respond in a timely and effective manner to any and all events that arise. These therapist visits will be communicated with the supervisor in the area being visited at the day program site. It is the responsibility of the day program service provider to inform therapists in writing who the area supervisors are and when they change.

It is the responsibility of the PASA to train staff regarding this SummitStone procedure and to assure that the person with the most knowledge about the individual attend the

SummitStone meetings. SummitStone staff will hold trainings during the year to familiarize staff with procedures and give information, as well as provide trainings in regard to psychotropic medications.

GROUP REFERRALS:

All group referrals (except for those to (DBT) Dialectical Behavior Therapy) will be made by the FGI CM.

- v. SummitStone therapists will notify the FGI CM when a group will be starting and may suggest people that might benefit from participating in the group.
- vi. The FGI CM will then fill out a referral form for any individual who will be participating in the group (this includes all individuals that SummitStone therapists may have suggested as well as ones that Case Managers want to have included) and return it to the SummitStone therapist. All groups, except for the Substance Abuse group, are closed groups which means that once they start no new members can be added.
- vii. For DBT, the SummitStone therapist will notify the FGI CM that the individual is going to be invited into the group.
- viii. If FGI CM has concerns about this, SummitStone therapist and FGI CM will discuss the concerns and reach agreement prior to the individuals being invited.

CHANGING INDIVIDUAL STATUS FROM “MEDS ONLY” TO “ANNUAL”:

When an open SummitStone “Meds Only” individual is determined by the SummitStone medical staff to be in remission, or no longer needing on-going evaluation of his/her medications, the SummitStone therapist will notify the FGI CM that the recommendation has been made for the individual to obtain follow up treatment with the Primary Care Physician (PCP). The SummitStone therapist will send a letter to the PCP to notify the PCP of this recommendation. It is then the FGI CM’s responsibility to ensure that communication with PCP takes place to determine if PCP is willing to take over the prescribing of all the individual’s medications. The FGI CM will notify SummitStone therapist when confirmation has taken place and at that time, the individual is closed to SummitStone and placed on Annual status, if necessary.

TERMINATION OF THERAPY SERVICES:

If a SummitStone therapist determines that therapy is no longer necessary, and has discussed this with the individual, he or she will contact the IDT.

Concerns may need to be addressed within the IDT.

The SummitStone therapist will work with the individual on this process and deliver a brief summary of why therapy is being discontinued to the FGI CM.

SUMMITSTONE/FGI LIAISONS

Karen Corriveau	SummitStone Lead Therapist	266-5413 (office)
Debbie Lapp	Foothills Gateway, Inc.	266-5315 (office)
		690-8122 (cell)

SUMMITSTONE THERAPISTS

Ashley Shaw Dawson	SummitStone Therapist	266-5431 (office)
Sally Blevins	SummitStone Therapist	266-5329 (office)
Colby Miller	Meds only – Case Manager	266-5372 (office)

9/07. 5/15; 9/15; 11/15