

FOOTHILLS GATEWAY, INC.

SummitStone Health Partners

PROCEDURE:

REFERRAL PROCESS:

The Interdisciplinary Team (IDT) will determine that the individuals may need mental health services and/or annual review of psychotropic medications.

The HCBS-DD residential 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 Annual evaluations, 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 Annual evaluations 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 a Case Management Director. The CM Directors 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 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:

As a client of SummitStone, all mental health services are accessed through the primary SummitStone therapist. If that person is unavailable, and an urgent situation arises that cannot wait for the primary therapist's return, 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 unless specifically requested by them. It is preferred that if an individual needs psychiatric services that the SummitStone therapist will make that determination and the arrangements.

SCHEDULING WITH PSYCHIATRIST

A schedule for all SummitStone appointments with the Psychiatrist will be developed by the FGI Housing Coordinator and a SummitStone liaison and distributed weekly to FGI CMs, the Chief Operating Officer – Case Management Division, Case Management Directors, and the SummitStone therapists. Individual schedules for individuals in HCBS-DD services will be given to each PASA for the person in that PASA's services. FGI CMs will inform the parents/guardians and individuals of scheduled appointments. If a 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 time. However, if an appointment must be rescheduled, the FGI CM should be contacted, and they will then coordinate rescheduling with the SummitStone Case Manager.

SCHEDULING WITH A THERAPIST

The SummitStone Therapist will contact the individual or designated contact on the referral form to schedule therapy appointments. These appointments should be given to the front desk the Friday before the week of the appointment. If a therapist will be out of the office and needs to cancel therapy appointments, one of the SummitStone therapists will contact the person or designated support staff directly. The front desk needs to be notified if the therapist is out of the office for the day(s). One of the Case Manager Directors also needs to be notified.

EMERGENCY CONSULTATION

Services provided by the SummitStone medical staff are scheduled in advance. SummitStone maintains one open appointment each week to be used for emergencies 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. 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 as can be arranged.

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.

For people enrolled in HCBS-DD, the residential 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, and those not yet enrolled, the FGI CM can assist with the coordination of transportation.

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 that SummitStone assumes 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 is the facilitator for medication evaluations.

Emergency medical case consultations 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. A case consultation 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. Consultations 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 consultation. 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 press 1 to be transferred to the Community Crisis Clinic where a therapist would be available for a brief consultation. 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 crisis is needed after normal business

hours, the individual should be taken directly to Crisis Stabilization Unit. 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.

DOCUMENTATION PROVIDED BY SUMMITSTONE AND TO SUMMITSTONE:

With appropriate releases in place, 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 HCBS-DD 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 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 a FGI CM.

- i. 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.
- ii. 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.

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

When an open SummitStone “Meds Only” individual is determined by the SummitStone medical staff to no longer need 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 the FGI CM’s responsibility to ensure that communication with PCP takes place to determine if PCP is willing to prescribe 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

Lance Moberly	Program Manager, Team Lead	305-7464 (cell)
Marla Maxey	Foothills Gateway, Inc.	266-5317 (office) 690-8129 (cell)
Pat Carney	Foothills Gateway, Inc.	266-5419 (office) 443-2619 (cell)
Amy Baca	Foothills Gateway, Inc.	266-5331 (office) 219-0531 (cell)

SUMMITSTONE THERAPISTS

Melissa Schnee	SummitStone Therapist	617-3740 (cell)
Carley McClure	SummitStone Therapist	617-0974 (cell)
Taryn Metcalf	SummitStone Case Manager	294-1184 (cell)

9/07. 5/18; 6/19; 6/21