REMINDER LIST

1. It is expected that you will make initial phone contact with new referral within 24 hours. It is expected that newly referred clients are to be seen face to face within a week of being assigned to you. If there is a delay, i.e, the prospective client does not return your calls; went to the hospital; or vacation, please notify the office to speak with Anna and you can also notify Linda by email or text.

2. Clients are expected to be seen weekly unless there is a valid reason as given in the example above.

3. Assessments are to be entered into Pimsy within 48 hours of the session.

4. Progress notes and assessments are due into Pimsy by Sunday of the week the therapeutic sessions are done.

5. All progress notes and assessments are to be entered by the last day of each month. Please text Mel when you have completed all your notes so we can get an accurate note count for the month.

6. Allow at least five minutes in between session times. This applies if you are visiting multiple clients at the same facility.

7. We MUST have legal consent form and Release of Health Information signed; and a medication list in order to release assessments. Also, an evaluation of possible Maltreatment Risk is to be answered and a scored Depression Scale is suggested.

❖ Pimsy will be made available to you on your computer (limited version for Apple computers but still fully functional) as well as an app for tablets and cell phones! In the phone/tablet app, you can upload photos of your consents and releases easily! We can walk you through it but if you are still having trouble, please email your consents to linda@bluemoonseniorcounseling.com and admin@bluemoonseniorcounseling.com (both, please).

8. If a client is not available for a scheduled appointment, enter a line or two stating that and use the “604 – No Show”. Any communication that is not face-to-face (i.e., phone) please enter a line or two in Pimsy stating this and use “602 – Non-Billable Case Management”. This applies to clients that go to the Hospital or are in rehab facilities; that is, we do not make visits to clients at these facilities but do make note of it as a “602”.

9. Please remember to sign in when arriving at a facility for a counseling session, as well as sign out when you leave.

10. If there is a POA (Power of Attorney) responsible for one of your clients, please contact and open communication with him/her regarding your counseling and the clients’ progress and status.

11. Be sure to get a name and number for a contact person for your client, especially if they live in a private home.

12. Be sure to notify the office for billing and Linda for notes review/release if your client is on Hospice – this requires a specific ‘HOSPICE’ billing code.