



### **Introduction**

The following information is to disclose the intake process to ensure it is completed legally and ethically.

### **Hours of Operation for Intake Calls**

HHC is open from 9am to 5pm Monday through Friday for receiving new patient calls. Calls or emails received will be returned as soon as possible, and ideally within 24 hours; however, holidays, illness, or scheduled staff time off may delay a return call.

### **Intake Process**

Prior to the client being seen by a counselor, the following steps must be completed by the Intake Coordinator and the Client.

1. The Intake Coordinator will phone the client and obtain the necessary data to determine that the Client is appropriate for our services.
2. Then, an appointment will be scheduled with a Counselor. The Counselor is chosen based on the Client's needs and preferences communicated during the intake process. The appointment will be held with a \$50 deposit.
3. After the time and date are set, additional demographic information will be collected, and the Client will be set up in the TherapyNotes system. The client will be oriented to TherapyNotes and be provided with TherapyNotes portal access to complete the necessary paperwork for the initial appointment. Additionally, an appointment reminder will be set up in TherapyNotes. The intake paperwork must be received 48 hours prior to the initial appointment, or the appointment may be rescheduled.
4. The Client will be instructed on how to access their portal and complete the necessary paperwork. The client may e-sign in the portal, print out, complete, sign, and either mail, send by HIPAA compliant Fax (941) 806-0447, or scan the documents back to our HIPAA compliant Email: [support@harmony-harbor.com](mailto:support@harmony-harbor.com).
5. The following forms are required to attend an initial Intake Appointment:
  - a. Client Information Form and History Form
  - b. Telehealth Consent, if appropriate (Individual)
  - c. Releases of Information, if applicable
  - d. Sign the GFE Intake Assessment and provide Credit Card Authorization Form with \$50 Deposit
  - e. Sign the Consent for Treatment, HIPAA, and Policies and Procedures
6. The Initial Therapy Intake appointment will only be held once the above forms are complete, and the deposit is received.