Policy Title: 8003V.1 Assessment Procedures for Presenting Problems and Relevant Psychological, Social, and Medical Conditions

Patient Age Group: (X) N/A ( ) All Ages ( ) Pediatric ( ) Adult

Purpose:

The purpose of this policy is to outline the procedures for conducting a comprehensive assessment at Centro Savila Behavioral Health Services. This assessment will focus on identifying the client's presenting problems, along with relevant psychological, social, psychiatric, and medical conditions that may impact their mental health and overall well-being. The policy ensures that clients receive a thorough evaluation that informs individualized treatment planning and promotes effective, integrated care.

Scope:

This policy applies to all clinical staff involved in the intake, assessment, and treatment planning process at Centro Savila. The assessment will cover presenting concerns, underlying psychological conditions, social factors, and any medical or psychiatric issues that may be relevant to the client's treatment needs.

Definitions:

1. **Presenting Problems:** The primary concerns, symptoms, or issues that bring the client to seek behavioral health services. These can include mental health symptoms (e.g., anxiety, depression), behavioral concerns (e.g., substance abuse, aggression), or psychosocial difficulties (e.g., relationship problems, life stressors).
2. **Psychological Conditions:** Mental health disorders, including but not limited to mood disorders (e.g., depression, bipolar disorder), anxiety disorders, psychotic disorders, and other psychological conditions that may impact a client's functioning.
3. **Social Conditions:** External factors affecting the client's mental health, including family dynamics, relationships, socioeconomic status, housing stability, work-related stress, cultural background, and social support networks.
4. **Psychiatric Status:** The client's mental health state, including any diagnoses or psychiatric conditions that may require specialized treatment (e.g., schizophrenia, bipolar disorder, personality disorders).

5. **Medical Status:** The client's physical health, including any chronic medical conditions, medications, disabilities, or health-related concerns that may affect mental health treatment (e.g., diabetes, neurological conditions, cardiovascular disease).

Policy:

Centro Savila Behavioral Health Services is committed to providing holistic, client-centered care that integrates an understanding of the client's presenting problems, psychological and social conditions, and any medical or psychiatric issues. This comprehensive approach helps ensure that treatment is tailored to the client's unique needs and promotes overall well-being.

Key Areas of the Assessment:

1. **Presenting Problems:**
    - Clinicians will begin by gathering information regarding the client's primary reason for seeking services. This may include:
        - **Current symptoms:** e.g., feelings of sadness, anxiety, panic, anger, or hopelessness.
        - **Behavioral issues:** e.g., substance use, aggression, self-harm, or impulsivity.
        - **Functional impairments:** e.g., difficulty at work or school, issues with relationships, or impaired daily functioning.
        - **Recent stressors or life events:** e.g., recent trauma, loss, job loss, or major life transitions.
2. **Relevant Psychological Conditions:**
    - The clinician will assess the client's mental health history and any underlying psychological conditions that may be contributing to their presenting problems, including:
        - **Mood disorders:** e.g., depression, bipolar disorder.
        - **Anxiety disorders:** e.g., generalized anxiety disorder, panic disorder, phobias.
        - **Psychotic disorders:** e.g., schizophrenia, delusional disorder.
        - **Obsessive-compulsive and related disorders:** e.g., obsessive-compulsive disorder (OCD), hoarding disorder.
        - **Personality disorders:** e.g., borderline personality disorder, antisocial personality disorder.
        - **Trauma and stress-related disorders:** e.g., post-traumatic stress disorder (PTSD), acute stress disorder.
3. **Social Conditions:**
    - Clinicians will evaluate the social and environmental factors that could affect the client's mental health. This includes:
        - **Family dynamics:** e.g., family history of mental health or substance use problems, relationships with parents, siblings, and children.

        - **Social support:** e.g., availability of friends, extended family, or community support.
        - **Cultural and environmental factors:** e.g., socioeconomic status, cultural norms, community resources, and challenges related to immigration or acculturation.
        - **Living situation and stability:** e.g., housing status, homelessness, or unstable living conditions.
        - **Work or school-related stressors:** e.g., job-related issues, academic pressures, or unemployment.
4. **Psychiatric Status:**
    - The assessment will include a detailed inquiry into the client's psychiatric status, including:
        - **Past psychiatric history:** e.g., previous diagnoses, hospitalizations, or psychiatric treatments.
        - **Current psychiatric conditions:** e.g., schizophrenia, mood disorders, or psychosis.
        - **Suicidal or homicidal ideation:** e.g., screening for thoughts of self-harm or harm to others, including risk assessment.
        - **Current medications:** e.g., psychotropic medications, medication adherence, and side effects.

Procedure:

1. Initial Assessment:

- **Scheduling and Preparation:**
    - Clients requesting services will be scheduled for an initial assessment with a licensed clinician. The client will be provided with information about the assessment process, including what to expect and any forms to complete beforehand (e.g., intake paperwork, history of medical or psychiatric conditions).
- **Conducting the Assessment:**
    - **Presenting Problems:** The clinician will begin by asking open-ended questions to understand the client's primary concerns, including specific symptoms, behaviors, or challenges they are facing.
    - **Psychological and Psychiatric History:** The clinician will ask about any past psychiatric diagnoses, mental health treatments, or hospitalizations.
    - **Social and Family History:** The clinician will assess the client's family background, including mental health history, substance use, and the client's role within the family dynamic.
    - **Medical History:** The clinician will inquire about any medical conditions, medications, or ongoing treatments that might affect the client's mental health care.
- **Assessment Tools:**
    - Standardized tools may be used during the assessment, including:
        - **PHQ-9 (Patient Health Questionnaire-9):** To assess depression severity.

        - **GAD-7 (Generalized Anxiety Disorder-7):** To assess anxiety severity.
    - The clinician will evaluate any immediate risks to the client's safety, including suicidal ideation, self-harm, or harm to others. If risk is identified, an appropriate safety plan will be developed.

2. Formulation of Treatment Plan:

- **Integrating Assessment Data:**
    - Following the assessment, the clinician will integrate the information gathered regarding the client's presenting problems, psychological conditions, social factors, psychiatric status, and medical conditions to develop a comprehensive treatment plan.
    - The treatment plan will outline specific goals for therapy, recommended interventions, referrals to other services (if needed), and a timeline for follow-up assessments.
- **Treatment Interventions:**
    - Based on the assessment, treatment interventions may include:
        - **Therapeutic modalities:** e.g., cognitive-behavioral therapy (CBT), dialectical behavior therapy (DBT), trauma-focused therapy.
        - **Social interventions:** e.g., case management, family therapy, or support groups.
        - **Medical referrals:** If needed, clients will be referred to a medical provider for co-occurring conditions (e.g., chronic health conditions, neurological assessments).

3. Ongoing Assessment and Monitoring:

- **Reassessments:**
    - Clients will be reassessed periodically throughout treatment to evaluate progress and adjust the treatment plan as needed. This will include tracking improvements or challenges in the client's emotional, social, psychiatric, and medical conditions.

- **Adjustments to the Treatment Plan:**
    - If the client's needs change or new issues emerge, the treatment plan will be updated accordingly. Ongoing assessment allows clinicians to ensure that care remains responsive to the client's evolving needs.

4. Referral for Additional Services:

- **Referral Process:**
    - If the assessment indicates a need for additional services (e.g., psychiatric evaluation, substance use treatment, or medical care), the clinician will facilitate referrals. This may involve:
        - Providing the client with the contact information for specialists.

- Coordinating with referral providers to ensure a smooth transition of care.
- Assisting with transportation or financial support for services, if needed.

Staff Responsibilities:

1. **Clinical Staff (Therapists, Counselors, Psychiatrists):**
    - Conduct comprehensive assessments, develop treatment plans, and provide ongoing therapy or psychiatric care.
    - Monitor the client's progress and make adjustments to treatment as needed.
    - Ensure that all relevant psychological, social, psychiatric, and medical information is considered in the assessment process.
2. **Case Managers:**
    - Assist clients in accessing resources and support services, including referrals for medical, psychiatric, or social services.
    - Help coordinate care between different providers and ensure that the treatment plan is followed.
3. **Administrative Staff:**
    - Schedule appointments and ensure that clients complete necessary forms before assessments.
    - Provide clients with information regarding the assessment and treatment process.

Confidentiality:

All information collected during the assessment process will be kept confidential in accordance with HIPAA regulations and Centro Savila's privacy policies. Clients will be informed of their rights to privacy and the limits of confidentiality, particularly in cases where safety concerns are present (e.g., suicidal ideation or harm to others).

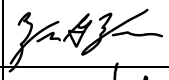
Client Rights:

- Clients have the right to be fully informed about the assessment process and to provide consent for the sharing of any personal information, except where disclosure is required by law.
- Clients may refuse to answer specific questions or participate in parts of the assessment; however, this may limit the ability to develop a complete treatment plan.
- Clients have the right to request referrals to other professionals or agencies and receive assistance in obtaining additional care if necessary.

This policy ensures that Centro Savila Behavioral Health Services delivers comprehensive, culturally competent care that considers all factors impacting a client's mental health and overall functioning. The goal is to provide an individualized treatment plan that addresses presenting concerns while promoting long-term well-being.

Approved by: William G. Wagner, Executive Director
Created: 08/28/2022 Updated: 11/12/24

Signature:

Item	*Date*	*Signature*
Executive Director	11/15/2024	
Deputy Director	11/14/2024