Policy Title: 8012V.1 Assessment Procedures and Use of Diagnostic Integrated Assessment for Treatment Planning
Patient Age Group: (X) N/A ( ) All Ages ( ) Pediatric ( ) Adult

Purpose:
The purpose of this policy is to outline the procedures for conducting assessments at Centro Savila, including the use of diagnostic integrated assessments. The goal is to ensure that all individuals receive a comprehensive evaluation, which allows for the development of an appropriate and personalized treatment plan to support their mental health and behavioral well-being.

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1. Scope and Applicability

This policy applies to all clinicians, mental health professionals, and support staff involved in the assessment and treatment planning processes at Centro Savila. It is intended to guide the collection of relevant information, the use of standardized diagnostic tools, and the development of a treatment plan tailored to each individual's needs.

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2. Assessment Process Overview

The assessment process at Centro Savila consists of several stages to ensure that all necessary information is gathered and analyzed in a timely and effective manner. The assessment will involve the following components:

2.1 Initial Intake Evaluation

- **Purpose:** To gather preliminary information about the client's presenting concerns, medical history, psychosocial background, and any immediate safety concerns.
- **Content:** The intake evaluation will include personal details, mental health history, substance use history, family dynamics, trauma history, and current functioning (emotional, cognitive, social, and behavioral).
- **Format:** A structured interview, along with intake forms that may include screening tools to assess for immediate risk or need for urgent care.

2.2 Diagnostic Integrated Assessment

- **Purpose:** To provide a comprehensive, integrated evaluation that will inform the development of a treatment plan.

- **Approach:** This assessment will combine clinical interviews, diagnostic tools, and possibly self-report questionnaires. It will take into account:
    - **Psychological evaluations** (e.g., DSM-5 criteria for mental health conditions)
    - **Behavioral assessments** (e.g., observations of behavior patterns, communication style)
    - **Cognitive assessments** (e.g., screenings for cognitive impairment, attention, memory, executive function)
    - **Psychosocial assessments** (e.g., review of life stressors, social support systems, family dynamics)
    - **Substance use assessments** (if applicable)
    - **Trauma assessments** (for clients with histories of trauma or abuse)

  The integrated assessment will also consider cultural, socioeconomic, and environmental factors that may influence the individual's mental health.

2.3 Clinical Interviews and Collaboration

- **Purpose:** To gather more detailed information about the client's history, current symptoms, and goals for treatment.
- **Format:** This includes a one-on-one interview between the client and clinician, with an emphasis on open-ended questions, active listening, and establishing rapport. If needed, the clinician may also engage family members or other professionals (e.g., primary care providers, previous therapists) to gather additional collateral information. Clinical screenings and needs assessments may be used to more accurately assess for clinical symptoms as well as unmet needs and social determinants of health.

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3. Use of Diagnostic Integrated Assessment

A diagnostic integrated assessment is a critical tool in identifying the presence of mental health disorders, co-occurring disorders, and other relevant factors that affect treatment planning. This tool will help to:

- **Establish a clear clinical diagnosis** based on current DSM-5 criteria and evidence-based diagnostic frameworks.
- **Identify strengths and weaknesses** in the client's coping mechanisms, behavior, and cognitive functions.
- **Screen for co-occurring disorders** such as substance use, trauma, and physical health conditions that could impact mental health.
- **Incorporate a holistic view** of the client's needs, allowing for a comprehensive and individualized treatment plan.

Clinicians must ensure that diagnostic assessments are culturally sensitive and account for any language barriers or cultural factors that may influence the interpretation of symptoms and diagnostic criteria.

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4. Development of Treatment Plan

Following the diagnostic integrated assessment, a personalized treatment plan will be developed in collaboration with the client. The treatment plan will be:

4.1 Client-Centered

- The client's preferences, values, and goals will be taken into account when designing the treatment approach. Empowerment and autonomy will be prioritized, with the aim of creating a collaborative partnership between the clinician and client.

4.2 Comprehensive and Holistic

- The treatment plan will consider all areas of the client's well-being, including emotional, physical, cognitive, and social factors. Recommendations may include:
    - **Individual therapy** (e.g., Cognitive Behavioral Therapy, Dialectical Behavioral Therapy, trauma-informed care)
    - **Group therapy** (e.g., support groups, psychoeducation groups, skill-building groups)
    - **Family therapy** (if applicable, especially when family dynamics are influencing the client's well-being)
    - **Substance use treatment** (if indicated)
    - **Referral for additional services** (e.g., housing assistance, legal support, vocational training)

4.3 SMART Goals

- The treatment plan will include clear, measurable, and time-bound goals (SMART goals) to guide the therapeutic process. Goals should be focused on addressing the client's presenting concerns and building coping strategies for long-term well-being.

4.4 Regular Review and Updates

- Treatment plans will be reviewed regularly (every 90 days or earlier) and updated based on progress, feedback from the client, and ongoing assessments. Adjustments may be made to interventions as necessary to ensure the client is receiving the most effective care.

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5. Documentation and Confidentiality

All assessments, diagnostic results, and treatment plans will be documented in the client's confidential electronic health record (EHR). Clinicians are responsible for ensuring that all documentation is thorough, accurate, and adheres to legal and ethical standards for privacy and confidentiality (HIPAA regulations).

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6. Ethical and Cultural Considerations

At CSBH, all assessments and treatment plans will be conducted in a manner that respects the client's cultural background, values, and preferences. Special care will be taken to ensure that diagnostic tools and interventions are adapted appropriately for clients from diverse backgrounds, including linguistic, cultural, and socioeconomic factors.

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7. Roles and Responsibilities

- **Clinicians:** Responsible for conducting initial assessments, administering diagnostic integrated assessments, collaborating with the client to develop the treatment plan, and revising the treatment plan as necessary.
- **Supervisors/Managers:** Ensure that assessment procedures are followed consistently and in compliance with best practices, as well as reviewing cases and treatment plans for quality assurance.
- **Administrative Support Staff:** Ensure that intake and assessment forms are properly completed, records are maintained securely, and appointments are scheduled to ensure timely evaluations.

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8. Conclusion

Centro Savila Behavioral Health is committed to providing high-quality, individualized care through thorough and evidence-based assessment procedures. The use of diagnostic integrated assessments is essential in ensuring that each client receives the most appropriate and effective treatment plan tailored to their unique needs.

Approved by: William G. Wagner, Executive Director
Date: 11.12.24

Signature:

Item	*Date*	*Signature*
Executive Director	11/12/2024	
Deputy Director	11/12/2024	