

Direct service appointments are required to be offered to the client/caregiver every 10 business days. Direct appointments offered can include any authorized service code including caregiver training. Offers must be documented in the client's record, and documentation must include the following:

- Date of contact
- Name of contact (both the Provider representative making the contact and the client representative receiving the contact/offer).
- The date(s) and time(s) that were offered to the client/caregiver
- Whether that offer was accepted or declined
  - If declined, date that provider will call back for next offer
- Date of appointment that was accepted and scheduled.

**Assessment Examples:**

- *Example: 01/05/2020: Called and spoke to client's mother. Offered 1<sup>st</sup> appointment of 01/10/2020; client's mother declined. 1st appointment scheduled for 01/25/2020.*
- *Example: Met with client and caregiver for first assessment appointment on 01/25/2020. Offered next appointment for 01/28/2020, mother declined, but accepted 01/30/2020.*

**Treatment Examples:**

- *Example: 01/05/2020: Spoke with client's mother. Offered a first treatment date of 01/10/2020 and a treatment schedule of: Mondays from 3-5pm, Tuesdays from 4-6pm, and Thursdays from 3-7pm (total of 8 hours per week). Client's mother declined this start date and schedule. Start date was scheduled for 01/25/2020 and the schedule was set for Mondays from 4-5pm, Tuesdays from 4-6pm, and Thursdays from 4-7pm (total of 6 hours per week).*
- *Example: Met with client and client's mother on 01/25/2020. Shared that current BT is not feeling well and will not be able to facilitate sessions for the remainder of the week. Offered next session date of 02/02/2020, mother accepted.*

**Transfer Example:**

Scenario: Client requested transfer from provider due to staffing challenges. A new Provider has not been found for this client yet. Provider will need to continue to make offers every 10 days until a new provider is able to start.

- *Example: 03/02/22: Spoke to client's mother. Offered direct caregiver training appointment for 3/03/2022, mother declined appointment and did not want to schedule at this time. We will follow up on 3/15/22 to offer another appointment for 3/17/22.*

## Optional Templates:

### Template 1: Appointment Offer

|  |  |
|--|--|
| Client Name:   | Client MRN:  |
| Communication Type: <input type="checkbox"/> Phone Call <input type="checkbox"/> Email <input type="checkbox"/> Text |  |
| Relationship of Client Representative Communicated with: Choose an item.   |  |
| Name of Client Representative Communicated with:   |  |
| Date offer made:<br>Click or tap to enter a date.  | Date of Appointment offered:<br>Click or tap to enter a date.                  |
| Type of service appointment offered:<br>Choose an item.  | Type of appointment offered:<br>Choose an item.                                |
| Family's Response to offer:<br>Choose an item.   | Other Appointment Date Scheduled (if applicable) Click or tap to enter a date. |
| Follow Up Date: Click or tap to enter a date.  | Offer by Date: Click or tap to enter a date.                                   |

### Template 2: Schedule Offer

|  |   |
|--|---|
| Client Name:   | Client MRN:   |
| Communication Type: <input type="checkbox"/> Phone Call <input type="checkbox"/> Email <input type="checkbox"/> Text |   |
| Relationship of Client Representative Communicated with: Choose an item.   |   |
| Name of Client Representative Communicated with:   |   |
| Date schedule offer made:<br>Click or tap to enter a date.   | Date Schedule Offered would begin:<br>Click or tap to enter a date.                   |
| Type of service schedule offered:<br>Choose an item.   | Type of schedule offered:<br>Choose an item.  |
| Family's Response to offer:<br>Choose an item.   | Actual Schedule Accepted:<br>Schedule:<br>Beginning on: Click or tap to enter a date. |
| Follow Up Date: Click or tap to enter a date.  | Offer by Date: Click or tap to enter a date.  |

### Template 3: Appointment and/or Schedule Offer

*Date: Spoke with client's [relationship], [name]. Offered [appt type] appointment for [date of appointment offered] at [time of appointment offered]. Client's [relationship] [accepted/declined] this appointment offer. Will follow-up with client on [follow-up date].*