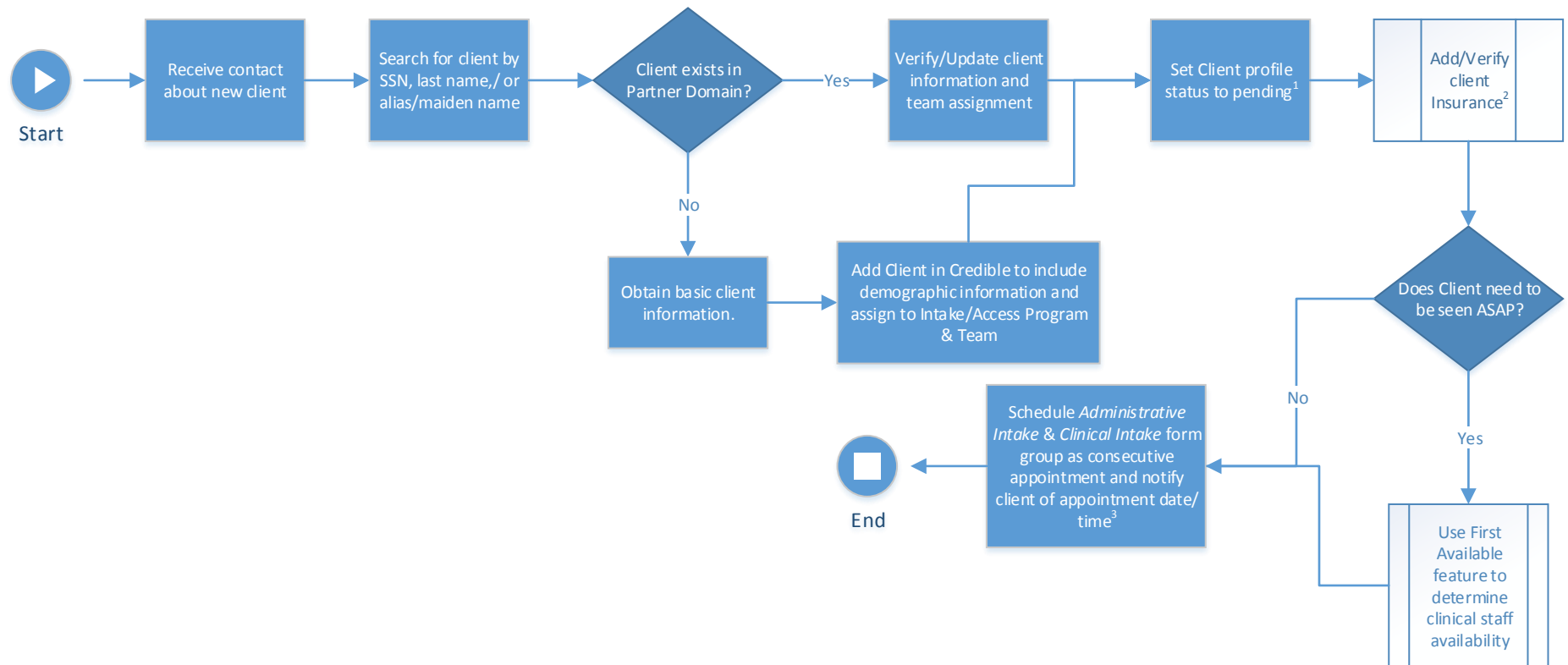# Administrative - Schedule Initial Appointment

CREDIBLE

Team: Intake/Access   **Program**: Intake/Access

Security Matrix Role: Front Desk / Billing / Billing Support

Start → Receive contact about new client → Search for client by SSN, last name,/ or alias/maiden name → **Client exists in Partner Domain?**

- **Yes** → Verify/Update client information and team assignment → Set Client profile status to pending[1] → Add/Verify client Insurance[2]

- **No** → Obtain basic client information. → Add Client in Credible to include demographic information and assign to Intake/Access Program & Team → (to) Set Client profile status to pending[1]

Does Client need to be seen ASAP?

- **No** → Schedule *Administrative Intake* & *Clinical Intake* form group as consecutive appointment and notify client of appointment date/ time[3]

- **Yes** → Use First Available feature to determine clinical staff availability → (to schedule)

Schedule *Administrative Intake* & *Clinical Intake* form group as consecutive appointment and notify client of appointment date/ time[3] → **End**

Legend

Process	Decision	Subprocess	Start/ End	Optional Process	Alert	Documents

NOTES

1. Best practice is to have Episode per Program Assignment turned on. This will create a new episode when a program is assigned.

2. Set all insurance to PENDING status

3 .Schedule template can be used to identify clinical staff schedule time reserved for intake assessment