**Client Intake and Support Checklist**

**Client Name: Sally Sassypants** **Date: 6/18/25**

**Administered By: Sandy Finelli, PRSS-S**

1. **Picture ID**
   - x Has the client provided a picture ID?
     - x If yes, upload to the OneDrive & CRM.
     - ☐ If no, schedule an appointment for obtaining ID.
     - **Appointment Details:** _____
2. **Social Security Card**
   - x Has the client provided a copy of their Social Security card?
     - ☐ If yes, upload to the OneDrive & CRM.
     - x If no, schedule a time to transport the client to the Social Security office.
     - **Appointment Details:** __6/23/25, 9 am, SS Office on Vasser
3. **Registered as a Felon** (Required if client has more than one felony in Nevada)
   - x Confirm if the client is registered as a felon (if applicable).
     - x Not applicable
     - ☐ If no, assist the client in registering.
     - **Appointment Details:** _____
4. **Intercept** (Required if client has an ankle monitor)
   - ☐Not applicable
   - x Has the client reported to Intercept?
     - ☐ If no, make arrangements for the client to report to Intercept within 24 hours.
     - **Appointment Details:** 6/18/25 3 pm
5. **SNAP/Medicaid**
   - x Confirm eligibility and enrollment in SNAP and Medicaid (if applicable).
   - x Confer with the team to determine the most beneficial Medicaid Health Plan for the client (Anthem, Silver Summit, Molina, Health Plan of Nevada).
   - x Assist the client in signing up for both Medicaid and SNAP.
     - **Appointment Details:** Will meet Randy at office on 6/19/25 at 11 am to be transported to Welfare and sign up as an Anthem client
6. **Recovery Support Meeting Schedule** (All participants are required to attend a minimum of three self-help meetings per week)
   - x Document the client's current or planned attendance at recovery support meetings (e.g., 12-step, peer recovery meetings).
     - Client plans to attend the Friday Night Survivors meeting of NA as her home group. She will then choose two additional self help meetings to attend weekly.
   - x Provide online or printed schedule of meetings.
     - https://sierrasagena.org/?current-meeting-list=1
     - https://nnig.org/meetings
7. **Medical/Mental Health Needs**
   - x Assess and document any immediate medical or mental health needs or conditions.
     - Client will need to see a medical doctor for an annual physical
   - x Assist the client in connecting with their chosen Health Plan to schedule appointments.
8. **Drug/Alcohol Evaluation**
   - x Determine/document if the client is required by P&P to complete a drug/alcohol evaluation.

        - Sally is required to have a d/a evaluation and has been referred to Stepping Stones. Sally is to contact Stepping Stones at xxx-xxx-xxxx no later than Friday 6/20/25
    - x Refer the client to Life Changes preferred provider for evaluations.
    - x Client has signed the ROI between Life Changes and provider
    - ☐ Confirm completion of a drug/alcohol evaluation and document results.
        - Evaluation is to be uploaded to clients confidential file and CRM record to be case noted
9. **Mental Health Evaluation**
    - x Determine if the client is required by P&P to complete a mental health evaluation.
        - Details: Saly is not required to have a mental health evaluation
    - ☐ Refer the client to Life Changes preferred provider for evaluations.
    - ☐ Confirm completion of a mental health evaluation and document results (if applicable).
10. **Natural Supports**
    - x Identify and document any natural supports (e.g., family members, friends, community resources).
    - ☐ Additional Notes: Sally has a history of attending NA meetings in the northern Nevada area. She has been working with a local sponsor during her incarceration and plan to continue doing so. Although she does not have a strong relationship with her family, she has asked if she will be allowed to have lunch with her mother. This will be discussed at the team level.
11. **Employment Status**
    - x Document the client's current employment status (employed, seeking employment, not employed).
    - x Additional Notes: Sally is not currently employed but does have several leads. Most notably, she is hoping to return to her prior position at ABC printing Co.
12. **IRP/GPRA**
    - x IRP Scheduled for: 6/22/25 at 10 am in the admin offices
    - x GPRA Screening Tool Completed:
        - ☒eligible:
        - ☐not eligible
    - GPRA scheduled for: 6/22/25 at 10:30 am in the admin office
13. **Finalize**
    - **Upload "Client Intake and Support checklist to One Drive and CRM**
    - **Create DAP Case Note for CRM file**
        - **Copy this document to Chat GPT and enter "create DAP Case Note"**
        - **Sample Below:**

**DAP Case Note:**

**D (Data):**

- **Client Name**: Sally Sassypants
- **Date of Intake**: 6/18/25
- **Administered By**: Sandy Finelli, PRSS-S
- **Key Actions Completed**:
    - Client provided a picture ID (uploaded to OneDrive & CRM).
    - Scheduled for a trip to the Social Security office on 6/23/25 at 9 am for SS card.
    - Confirmed client is not registered as a felon (not applicable).
    - Client reported to Intercept on 6/18/25 at 3 pm.
    - Client confirmed for Medicaid and SNAP eligibility; appointment to meet Randy on 6/19/25 at 11 am for Anthem enrollment.

- Client plans to attend Friday Night Survivors NA meeting as home group and will attend two additional self-help meetings weekly.
- Client needs an annual physical, will connect with Anthem for scheduling.
- Client referred to Stepping Stones for a drug/alcohol evaluation, must contact by 6/20/25.
- No mental health evaluation required.
- Client has a local sponsor from NA meetings during incarceration and plans to continue this support; discussions on lunch with mother to be addressed at the team level.
- Client not employed but has job leads, especially hoping to return to ABC Printing Co.
- IRP scheduled for 6/22/25 at 10 am; GPRA screening scheduled for 6/22/25 at 10:30 am.

**A (Assessment):**

- Client is actively engaged with recovery support and addressing necessary health and legal evaluations. There are no significant barriers to participation or progress, and client is making proactive steps towards continued recovery and stability, including employment and medical care.

**P (Plan):**

- Follow up on the completion of the Social Security card application and the upcoming Medicaid enrollment on 6/19/25.
- Ensure client attends the IRP and GPRA appointments on 6/22/25.
- Monitor client's engagement with Stepping Stones for the drug/alcohol evaluation by 6/20/25.
- Provide ongoing support for employment leads and further medical/health planning.
- Team meeting to address lunch request with mother and explore any additional natural support options.