

# Appendix D: Pre-Assessment Checklist

Source: Dewane, Scott, & Brems (2005, p. 46)

## Referral process:

- Receive referrals through a single point of entry system
- Utilize a standardized referral form
- Provide client or caregiver with a letter explaining purpose and process of diagnostic team

## Screening process:

- Determine eligibility of client
- Prioritize client list
- Inform referral sources in a timely manner of outcome of screening process
- Provide an explanation and referral alternatives to ineligible clients

## Forms completion:

- Schedule a face-to-face appointment with client and caregivers
- Assist clients with forms completion to decrease attrition rate
- Use the Paper Trail notebook
- Utilize a pre-established charting system
- Track client status through an internal electronic tracking system

## Obtaining records:

- Secure signed release of information forms
- Use telephone, fax, or mail for making request
- Learn the most effective way to request records from different facilities
- Remember that gathering information from other agencies will improve the diagnostic