Naropa UNIVERSITY
COUNSELING SERVICES

Naropa Community Counseling
Training Manual

Resource Guide 2016

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Section 1
Getting Started

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Welcome

Naropa Community Counseling integrates contemplative approaches with modern clinical practice to assist our clients in reaching their highest level of emotional and mental well-being. We provide cutting edge, transformative intervention across a broad range of therapeutic services. Naropa Community Counseling serves Boulder and Front Range residents with low to moderate income, with sliding scale services from $30-90.

CONTEMPLATIVE AND MINDFUL HEALING

Somatic therapy: Focusing on the body's role in transforming behavior, integrating body awareness and movement with counseling skills.

Contemplative therapy: Merging in-depth training in cultivating mindfulness compassion with therapeutic work.

Transpersonal therapy: Reconnecting the spiritual dimensions of human experience with traditional theoretical perspectives.

Art therapy: Using art and the creative process to enter into an authentic relationship with self, other, process, and product.

Wilderness therapy: Integrating therapy with experiential and nature-based wisdom.

Equine therapy: Working with horses to promote physical, emotional, and occupational health.

Create effective change: Trained in stages of change/motivational interviewing, we are ready to help you make positive changes in your client's lives.

Referrals: If an initial evaluation reveals that your client's needs would be better served elsewhere, we will provide referrals to local therapists and resources.

CLIENT-CENTERED AND WELLNESS-INFORMED MODEL

Our focus begins and ends with the needs of each client. Treatment plans are reviewed by the director, and evaluated at least every six months. As a wellness-informed model, we specialize in treatment of depression, anxiety, trauma, bereavement, and adjustment issues.

NAROPA UNIVERSITY STUDENTS

Please note that Naropa students should contact Naropa's on-campus Student Counseling Center for any therapeutic needs.

ADDRESS:

3400 Table Mesa Drive,
Boulder, CO 80305

Hours
Mon – Thur: 9 am – 8 pm
Friday: 9 am – 6 pm

Contact
303-546-3589
counselingclinic@naropa.edu

Graduate Student Internship Agreement

Naropa Counseling Services (NCS) is committed to providing quality professional education for master's degree students in various disciplines. This agreement is between the intern, the educational institution and Naropa Counseling Services in regards to the educational goals and requirements of the internship. It is to be signed by the intern, the primary supervisor, the director of NCS and the Internship Coordinator.

In this section we will cover:

- ✓ Supervision Process
- ✓ Evaluation Process
- ✓ Expectations of the Intern
- ✓ Expectations from the University
- ✓ Naropa Counseling Services

Supervision Process

The supervisor's role is to:

- Ensure quality of clinical care to clients
- Monitor overall training experience
- Promote growth and stage development
- Support, model and share
- Evaluate intern's progress and performance

Supervision is...

1. A formal process of professional support and learning which enables individual practitioners to develop knowledge and competence, assume responsibility of their own practice and enhance client protection and safety in complex situations.

   The process concentrates on the educational and evaluative elements of the supervisory relationship, with continuous awareness of the distinction between clinical supervision and personal therapy.

2. About helping the trainee to become more effective with conceptual abilities, clinical intervention, assessment and diagnosis, and implementation, among other areas.

Evaluation Process

Evaluation is an important part of the supervisory relationship, which is inherently hierarchical. The primary supervisor works with the educational institution to evaluate the ethical, professional and therapeutic competence of the intern and their suitability for entry level (or independent) practice.

Evaluation will be communicated throughout the internship by way of oral and written means. Written evaluations will be completed by the primary supervisor and intern, at midterm and at the end of the internship experience.

Meetings will be held with the Internship Coordinator in the frequency designated by the educational institution. It is the intern's responsibility to communicate these requirements to their primary supervisor, including providing any forms needed for evaluation.

Expectations of the Intern

Interns will:

1. Be assigned a primary NCS supervisor with whom schedule and responsibilities will be reviewed.
2. Provide a copy of their liability insurance upon commencement of the internship.
3. Utilize supervision to help formulate assessments, diagnosis, treatment plans and review overall process as an intern.
4. Maintain regular attendance at the internship. When an intern is unable to report to the site, the primary supervisor must be notified. The intern is responsible for contacting and rescheduling clients.
    a. The intern must notify the supervisor of illness before 9 am.
    b. NCC interns will have 7 sick days per internship year
    c. NSCC interns will have 5 sick days per internship year
    d. Illnesses requiring more than 7 days absence will require a doctor's note.
    e. NCC interns will get 2 weeks vacation at Christmas time and 2 weeks of vacation to be taken at other times during the internship.
    i. Not all NCC interns may take Spring Break at the same time, to maintain service to community clients.
    f. NSCC interns will get all Naropa academic breaks and no more than 5 additional vacation days outside of these breaks
    g. Interns requiring a leave of absence must follow their GSCP program guidelines to obtain one, and understand that this may affect the accumulation of their clinical hours.
5. Spend the required weekly hours performing the duties identified by the site's primary supervisor and which meet the requirements of the school's educational program.
6. Attend individual supervision on a weekly basis.

Expectations of the Intern *continued*

7. Attend group supervision on a weekly basis.
8. Attend biweekly training sessions.
9. Receive training regarding online charting and subsequently practice timely charting, as specified by their NCS supervisor.
10. Be responsible for logging all the hours required for internship and will submit. to their NCS supervisor for signature on a monthly basis.
    a. The NCC internship commitment is for a full year of time (July to July)
    b. The Student Center internship commitment is for 9 months (Aug-May)
11. Abide by NCS policies and rules during internship, including conduct, confidentiality, HIPAA regulations and dress code.
12. Make available to the NCS supervisor the midterm evaluation form **at least 2 weeks** prior to due date.
13. Make available to the NCS supervisor the final evaluation form **at least 2 weeks** prior to due date.
14. Complete any other evaluative activities in a timely fashion (observed sessions, recorded sessions, meetings with clinical mentors, etc.).

Expectations From The University

1. Will provide consultation and support to NCS primary supervisor and director as needed to support effective internship experiences.
2. Will provide necessary internship requirements and documentation as a guide to the primary NCS supervisor.
3. Will provide interns with information about how to carry their own liability insurance.
4. Will participate in evaluative activities as dictated by program requirements.
5. Will provide support and consultation in the event that an intern's area of growth and development is not addressed sufficiently through the usual educational and on site supervision. If problem areas are identified, the Internship Coordinator will assist in developing a collaborative plan to address such areas.
6 Should an intern have support needs which are not effectively able to be met on site, the Internship Coordinator will assist with finding formal sources of educational support, including but not limited to, referral to Disability Services, assistance with Exceptions to Policy requests or any mediation needed between supervisor and intern.

Naropa Counseling Services

1. Will provide the intern with orientation material which outlines important information about Naropa Counseling Services, treatment provided and policies.
2. Will provide training, both didactic and experiential, on clinical and practical responsibilities during internship
3. Will provide the intern with qualified professional individual supervision (1 hour per week).
4. Will provide group supervision for all NCS interns, 2 hours per week, facilitated by licensed staff.
5. Will offer appropriate opportunities for therapeutic contact for the intern to develop skills during internship.
6. Will provide interns with needed supplies.
7. Will evaluate the intern and provide feedback on the intern's performance by oral and written means.
8. Will provide written evaluations to be reviewed with the intern at mid-term and at the end of internship.
9. Will participate in any needed meetings with educational staff to support the intern's programmatic requirements.
10. Will provide support in the event that an intern's area of growth and development is not addressed sufficiently through usual educational and on site supervision. If problem areas needing improvement are identified, then the educational institution is informed, as well as the intern and the Internship Coordinator, and a plan for improvement is developed together.
11. Reserves the right to terminate internship should an intern's level of unsatisfactory performance reach a point where it endangers client wellbeing, per NCS Policies and Procedures regarding impaired staff.

I agree that I have read and understand the Graduate Internship Agreement and have reviewed it with my Clinical Supervisor and Internship Coordinator, as well as the Naropa Counseling Services Director.

Internship start date: ____________________

Internship end date: _____________________

Intern Signature: ____

Date:__________________

Clinical Supervisor: ____

Date:_________________

Naropa Counseling Services Director:_______________________________________

Date:___________________

Internship Coordinator:____

Date:___________________

Scope of Service

The NCC seeks to provide an opportunity for low and moderate income members of the community to address issues of concern in their emotional life and mental health.

In this section we will cover:

- ✓ Evaluations/Phone Screens
- ✓ Treatment Plans
- ✓ Exceptions to Treatment

Evaluations

As a counseling center that largely employs graduate interns to provide individual and group services to clients, we are limited in the appropriate scope of our service and practice.

REMEMBER:
When the first appointment is being scheduled, inform the client that the initial visit is a structured clinical interview (history gathering). This may not be what clients are expecting - they may be expecting something more like a regular therapy session.

When a potential client calls the center for our services:

STEP 1 Get their name, number and email address.

STEP 2 Let them know that they have to complete the phone screening process to best match them with an intern therapist.

STEP 3 Let them know that the phone screen will take about 10-15 mins.

STEP 4 Ask for the best times to reach them within the following 24-48 hours (eliminates a bit of phone tag).

Log all call attempts on the phone log form. If you reach a client, phone screen forms are located in a file folder directly next to the scanner.

After an initial phone screening:

1. Appropriate clients will be scheduled by the director, assistant director, or site supervisor for an initial 90 minute intake with an intern therapist.
2. Intern therapist will gather relevant information during the intake and review their CCAPS. **This is discussed in Section 2: Client Policy, 'Client Greeting & Check-In'.*
3. The intern therapist will present the client in individual or group supervision.
4. Licensed clinical staff, and ultimately the site supervisor, will determine a good fit, resulting in referral or acceptance to the center, assignment of therapist, and treatment recommendations.
5. The intern will document the outcome of the client presentation in the client's file.

PLEASE NOTE:
The intern therapist will ask the client to fill out CCAPS during their initial visit to the center. They will look at these prior to their intake to determine areas of importance in the intake process.

Please refer to Client Greeting & Check-In in Section 2: Client Policy

PLEASE NOTE:

Treatment plans must be completed and **signed** by the 4th session.

Treatment Plans

Since treatment plans must be signed by the client, they provide a unique opportunity for collaboration.

Clients treatment plans will be reviewed in group or individual supervision at a minimum of every 6 months, and if a change in acuity or biopsychosocial needs has occurred which necessitates a higher level of care, recommendations will be made for disposition.

Length of Treatment

Clients may be seen at NCS for a length of treatment which will be identified in the initial treatment plan when their treatment issue is deemed within the scope of the service that the center can provide.

This will be re-assessed at each treatment plan review which will occur at a minimum of every 6 months, or when significant new treatment issues are identified.

Factors that play into length of treatment and treatment plan include:
(1) client's stated goals, (2) clinical issues, (3) clinician's assessment, and (4) financial resources of client.

Recommendation possibilities may include but are not limited to:

1. Continued individual therapy with additional community supports
2. Referral to group therapy support
3. Referral to the community for psycho-pharmacological or medical treatment
4. Continued individual or group therapy
5. Termination
6. Intensive outpatient treatment
7. Inpatient Treatment
8. Comprehensive care through community agencies

Permanent clinical staff will provide acute crisis assessment, short-term crisis management, and short-term case management of crisis situations in order to resolve situations with the least intrusive of interventions.

REMINDER:

If group therapy is the treatment of choice, clients may remain in group indeterminately as long as they agree to the guidelines established for groups.

Please refer to Group Guidelines for more information.

Exceptions to Treatment

Clients with complex issues may be better served by other services which provide medical, psychiatric, case management or specialized addiction treatment.

Clients may present significant personality disorders, thought disorders,

Exceptions to Treatment *continued*

PLEASE NOTE:

If you are in need of additional referral resources, the community center has an additional list in the **Resource Binder**, **Tab 5**.

primary addiction, active eating disorders, persistent mental illness, ongoing suicidality or parasuicidality, complex trauma, TBI or other issues that require specialized skill not found in the staff. These are people with issues that would better served by longer care or different kinds of treatment.

They may also be deemed too acute or chronic to be handled in a center with limited resources and availability. In that case, they will be referred to therapists in the community using our referral list or other appropriate venue such as Mental Health Partners.

Mental Health Partners
529 Coffman St #300
Longmont, CO 80501
(303) 684-0555

Mental Health Boulder County
1333 Iris Ave
Boulder, CO 80304
(303) 443-8500

Mental Health Center of Boulder
Public Health Department
899 US-287
Broomfield, CO 80020
(303) 466-3007

Office Etiquette

The NCC seeks to provide an environment that is mindful, supportive and respectful of one another's time, space, and privacy, as well as that of our client's and fellow tenant's.

In this section we will cover:

✓ Dress Code
✓ Kitchen Use
✓ General Reminders

Dress Code

Business casual is defined as:

>> Classic, clean cut, and put together look where a full suit is not required
>> Slacks, khakis, skirts, blouses, polo shirts, or shirts with a collar (no necktie)
>> Some sweaters, jeans, and leggings (w/skirt)

NOTE: It is not clothing you would wear to a club or for athletic purposes. Don't let the word casual mislead you. You still need to look professional.

Kitchen Use

Please do not allow clients in the kitchen.

Dishwasher

- Please wash your own dishes and place in the dishwasher to dry.
- Run dishwasher once per week to sanitize dishes.

Microwave

- Turn on kitchen fan when cooking food in the microwave.
  *There is a ventilation issue with our upstairs neighbors.
- Wipe down microwave after each use.

PLEASE BE AWARE OF YOUR VOLUME:

Please be aware of your volume in the hallway or at the front desk out of consideration for each other, our clients and our tenants.

General Reminders

- Please remove aging food from the refrigerator.
- Park on the street - we are not allowed to park in the parking lot, that is reserved for customers of all the businesses in the building
- Our lease does not allow dogs, so unless an animal accompanying your client is a service dog, kindly ask them to put the dog in their car.

Opening/Closing Duties

Here is a complete checklist for NCC seeks to provide an opportunity for low and moderate income members of the community to address issues of concern in their emotional life and mental health.

In this section we will cover:

- ✓ Morining Duties
- ✓ End of Shift Responsibilities

Morning Duties

First Person In:

1. Unlock main door
2. Turn on lights in entry room and hallway
3. Turn on all ambiant lighting
4. Wake up computer and launch Titanium
5. Turn on printer
6. Fill Brita pitcher
7. Empty dishwasher
8. Fill electric water kettle
9. Check that intake clipboard is ready with Intake, Consent, and Disclosure forms.
10. Check that there is a clipboard with Treatment Plans

PLEASE NOTE:

It can take 10-15 mins. for Titanium to load on initial startup.

Per Therapist per Room:

1. Turn on lights and sound machines in the area you are using.
2. If applicable, set up video recording machines in your room.
3. Adjust lighting

End of Shift Responsibilities

Billing

Batch out the credit card machine (see instructions)
Assemble receipts, checks and cash for deposit (see instructions)
Print Revenue Summary (see instructions)
Scan Revenue Summary (*to hide client names)
Save Revenue Summary as pdf – file format: Revenue Summary_20apr2016

End of Shift Responsibilities *continued*

Front Desk

1. Files locked/Keys in drawer
2. Drawer locked
3. Printer off

Client Files

1. All notes filed

Kitchen

1. Tea pot filled and off
2. Fill Brita and put in fridge
3. Make sure all dishes are cleaned and drying in dishwasher
4. Run dishwasher on Fridays to sanitize

Rooms

1. Check all rooms for people
2. Rooms cleared of dishes and trash
3. Windows locked
4. Sound machines off

General

1. Check bathroom for cleanliness
2. Check that bathroom is stocked (To replace paper towels, simply pull down on holder – there's no key. It's sticky, but it opens.)
3. All lights off
4. Lock doors (check back door)
5. Check that plants are watered

Quick Reference

What To Do If...

COMPUTER ISSUES

- Reboot
- Turn modem on and off (In IT closet in Group Room)
- Call IT Help Desk
- Ask Joy or Katina to put in IT ticket

REPAIRS ARE NEEDED

- Do NOT put in a facilities work order
  Some items are our landlord's responsibility and some are ours.
- Katina puts in facilities work orders and tracks their responses

CREDIT CARD MACHINE

1. Out of paper?

   PLEASE NOTE:
   The new rolls are too large and must be made smaller to fit inside the machine.

2. Call the help number listed on the side of the machine

3. Transactions can be cancelled if needed

ORDERING OFFICE SUPPLIES

- Note any needs on the order sheet by your mailboxes
- Mention in group supervision
- Make sure you anticipate needs by 2-3 weeks as the Office Depot ordering process can be quite slow

POWER GOES OUT

- Check fuses (Panels in intern work room)
- Push the GFI reset button in the bathroom

Naropa University
COUNSELING SERVICES

Section 2
Client Policy

Greeting & Check-In • Documentation • Emailing, Late Arrivals & Cancellations
Suicidal Protocol • Agitated Clients • Referral Reference Guide

Client Greeting & Check-In

The NCC seeks to provide a warm, welcoming environment for all of our clients through a series of small actions that create both comfort and trust.

In this section we will cover:

✓ New and Returning Clients
✓ Disabled Clients

Check In

WELCOME! Please remember to welcome all of your clients and offer them either tea or water. Since clients are not allowed in the kitchen, please bring their hot or filtered water to the waiting room.

New Clients

1. New clients will need to complete the intake process at the Titanium desk in the waiting room. ****Please let them know that this may take 10-15 minutes to complete.***
2. If Titanium is down, please provide paper forms for them to complete.
3. Make sure they also digitally sign the Consent and Disclosure forms after their intake.
4. As they're completing this process, prepare a paper copy of the paper Intake form, Consent, and Disclosure forms on a clipboard to take into the room.
5. Once they complete the electronic intake, select 'Process Incoming Data' in Titanium order to review their CCAP information (***no more than 5 minutes***).

CCAPS Review:

- Before beginning the session, review this information to get a sense of initial assessments and the areas that you should follow up on more thoroughly in session.
- Any sections marked in the yellow or red are areas of concern.
- Always check for SI and HI areas to get a sense of basic safety.
- A CCAPS with several areas in yellow, and/or red indicates a person with higher acuity.

6. Before they leave, make sure to give them their copies of the Consent and Disclosure forms.
7. You may need to occasionally restart the check-in computer.

UNATTENDED CHILDREN:

While children are welcome to stay in the waiting room, Naropa has no responsibility for their safety or welfare. Staff will not be responsible for monitoring or watching children.

Your clients should be made aware that the front door remains unlocked and we cannot control public access into our building.

Check In *continued*

Returning Clients

1. All returning clients will need to check in during every visit. Instruct them to click 'Returning Client' on their first visit after their intake.
2. Make sure that your student clients sign in as students.

Disabled Clients

1. If the person is a new client, please provide paper forms for them to complete.
2. Our office is wheelchair accessible from the corner of Gillaspie Drive and Table Mesa Drive.

Client Documentation

In this section we will cover:

- ✓ Notes and Diagnosis
- ✓ Treatments Plans
- ✓ Discharge Summaries

PLEASE NOTE:
Although the informed consent and mandatory disclosure forms are completed electronically through Titanium, you must give the client a copy to take with them and verbally review.

Notes and Diagnosis

All notes must be completed within 48 hours of seeing the client.

- Notes should be accompanied by diagnosis.
- If you mention a previous diagnosis in your note, you must document which (if any) of the symptoms that person is experiencing now
- Diagnosis will be reviewed in supervision. **Ask for help if needed.*
- Please do not diagnose all clients with adjustment disorder or diagnosis deferred
- It is strongly recommended that you obtain information from previous hospitalizations, or any previous psychiatric care by having your client sign a release of information.

Treatment Plans

Treatment Plans must be:

- Completed by the third session.
- Signed by the client.
- Reviewed and resigned when a client has been in treatment for 6 months.

Discharge Summaries

Upon termination, a discharge summary must be completed in Titanium, as well as note detailing the final session.

Please email your client the following SurveyMonkey link to so that we may obtain client satisfaction rating data:

https://www.surveymonkey.com/r/SYHHT2Z

Client Email, Late Arrivals and Cancellations

In this section we will cover:

✓ Email Etiquette & Setup
✓ Sample Emails
✓ Late Arrivals & Cancellations

REMEMBER:
Don't do actual therapy in email.

Email

- Be warm and friendly.
- **Set expectations early with your client early on about what their expectations are about frequency and rapidity of response.**

  Emailing is mainly for scheduling changes and clarification, not to create familiarity outside of the Center. Keep boundaries clear.

Signature

- Add language to your signature which states that the content of the email is private and confidential.
- Add language to your signature which identifies what to do in case of an emergency.
- Represent yourself accurately as an "Intern Therapist" and "Master's Degree Candidate" in your signature line.

Sample Signature:

Your Name
Intern Therapist
MA Clinical Mental Health Counseling Candidate
Mindfulness-based Transpersonal Counseling

http://www.naropa.edu/community-counseling

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you have received this email in error please notify the system manager. This message contains confidential information and is intended only for the individual named. If you are not the named addressee you should not disseminate, distribute or copy this e-mail. Please notify the sender immediately by e-mail if you have received this e-mail by mistake and delete this e-mail from your system. If you are not the intended recipient you are notified that disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited.

When emailing a Naropa Student Client, please add:

Feeling upset? Overwhelmed? Out of control? Need to talk?
The Naropa Crisis Counseling Line is available 24 hours a day/7 days a week.
Naropa Crisis Line: 1.855.254.3944

Sample Emails

No Shows:

"Hello client,

I notice that you have not attended our regularly scheduled appointment this week. Please let me know if you wish to reschedule, or if you are planning to attend at our regular time next week.

Clinic policy dictates that two weeks of no-shows is considered to be an indication that you no longer wish to receive services. I enjoy our work together and would like to continue it. Please contact me and let me know your thoughts."

Termination:

"Hello client,

I noticed that you have not attended any appointments with me for 2 weeks. Clinic policy dictates that two weeks of no-shows is considered to be an indication that you no longer wish to receive services.

I would encourage you to contact me so that we can schedule a termination appointment where we can review the progress we've made together and you can give me any feedback that you might wish.

Please contact me to schedule."

Student Center Introduction - Waitlist Candidates:

"Hi my name is [insert first name],

I am contacting you on behalf of Naropa Counseling Services. I learned from the Naropa Student Counseling Center that you are interested in therapy and were put on their waitlist. I am reaching out because I am an intern therapist and I have availability at the Naropa Community Counseling Center, located at 3400 Table Mesa Drive, Ste. 102 in S. Boulder.

The first 12 sessions are free and at that point you can begin paying $30 per session (or more) if you would like to continue.

Would you be interested in coming in for an intake to begin? Here are some times I am available in the next few days: [insert times] Getting started begins with you coming in, filling out some paperwork on a computer (CCAPS), and meeting with me for 90 minutes for an intake. This involves me asking some questions about things to get a full picture of what might be helpful for you. We'll feel out what you'd like to work on, whether or not our center is a good match for you, and what kind of therapist and therapy would be a good match for you. [Give them directions to the center.]

Thank you for your time."

Late Arrivals and Cancellations

Late Arrivals

Please encourage your new clients to arrive 10-15 mins. early for an intake since they will have to complete the 10-15 registration process, including the CCAPS.

Late Arrivals and Cancellations *continued*

PLEASE NOTE:

For some clients, it's therapeutic to be understanding of their lateness.

Use your best judgment when applying these policies, depending on your client's needs.

If it's a returning client, please encourage them to arrive 5-10 mins. early for their appointment; however, we know that this is not always possible.

If a client arrives late, please:

1. Give them the option to reschedule.
2. Inform them that the session will still end at the allotted time.
3. Inform them that they will be billed for the full hour.

Cancellations

Please let your clients know that we require a 24 hour notice for all cancellations. If a client cancels within the 24 hour window, we will not charge a fee for their first occurrence.

However, if they cancel a second time with little notice, we will charge a $15 fee (half of our Individual 1 rate).

Suicidal Protocol

The best case scenario is that the situation resolves with a safety contract. However, this is not always the case. The following section outlines steps to take if extra support is needed or if a situation excalates quickly.

In this section we will cover:

- ✓ Assessment
- ✓ Options For Disposition
- ✓ General Reminders

Assessment

STEP 1 **Fully assess the person:**

- **Ideation**
- **Plan**
- **Method**
- **Intention**

STEP 2 **Alert your supervisor**

STEP 3 **If your supervisor is not available, reach the other licensed Naropa Counseling Services Staff.**

STEP 4 **Keep the person present until they can be assessed by the licensed clinician.**

Jo-Lynn Park, MA, LPC
Manager of Student Counseling Center
Assistant Director of Counseling Services
Office: 303-245-4633 | **Cell: 970-759-8227** | **jpark@naropa.edu**

Joy Redstone, LCSW
Director of Counseling Services
Office: 303-546-3570 | **Cell: 303-503-9755** | **jredstone@naropa.edu**

Brooks Witter, MA, LPC
Clinical Supervisor
Cell: 303-641-2320 | **bwitter2@naropa.edu**

911 IS AN OPTION FOR:

ANY SITUATION THAT FEELS DANGEROUS.

Your own safety is of the **utmost** importance.

Options For Disposition

OPTION 1 **Situation resolves with a safety contract.**

OPTION 2 **Situation resolves with a plan for extra support.**

Plan For Extra Support:

1. Emergency sessions with yourself and/or Joy/Jo-Lynn.
2. Consider getting permission to contact supports in that person's life.
3. Document plan specifically in chart.

PLEASE NOTE:

As little as 5-6 Tylenol can be fatal.

Homicidal ideation may carry with it a legal duty to warn.

OPTION 3 Person is evaluated for hospitalization

1. Can be done by supervisors or by mobile crisis team: **(303) 447-1665**
2. Mobile crisis team can refer to a Crisis Stabilization Unit.
3. For more urgent cases, dispatch should be called: **(303) 441-3333**

If dispatch is called, be aware that this will bring police cars onto campus or the community center site. It is police protocol to use handcuffs.

- Security/Safety and Student Affairs should be notified when the person is on campus (please see below).
- If a person reports already ingesting a substance that could be dangerous, they must go to the ER for medical clearance.
- They will transport the person to the ER for evaluation.

General Reminders

1. Command auditory hallucinations are *always* cause for grave concern.
2. "Grave disability" is another category for possible hospitalization, but it's very hard to meet this criteria.

Security/Safety
2130 Arapahoe Avenue
Boulder, CO 80302
(720) 309-8211

Student Affairs
2130 Arapahoe Avenue
Boulder, CO 80302
(303) 546-3562

Naropa's 24 Hour On-Call Phone
(*When reporting an emergency)
(720) 309-8211

Agitated/Aggressive Clients Protocol

The best case scenario is that you will be able to calm down a person with verbal interventions, but this is not always possible, in particular if the person is experiencing psychosis or is altered with drugs or alcohol.

In this section we will cover:

- ✓ Assessment
- ✓ Options for Disposition
- ✓ Tarasoff Warning

Assessment

STEP 1 Start with asking calmly about what is upsetting the person
STEP 2 Allow adequate time for venting
STEP 3 Provide regulation for the person by noting your own tone, posture and level of agitation
STEP 4 Fully assess the situation

In order to fully assess the situation, you will need to revisit the questions asked during the phone screening and intake process, including:

- *What events led up to the situation? Is the person oriented to time and place?*
- *Ask specifically about drugs, alcohol and psychosis.*
- *Are they suicidal? (see Suicidal Protocol)*
- *Has this occurred before? How did it resolve last time? What helped?*
  **Use this information to help you decide and act to deescalate the person.*
- *Is the person wanting to harm another? Do they have a plan? Thoughts? Intention? Means?*
- *Ask specifically about threats to others: Ideation, Plan, Method and Intention**

*** A physical threat to another person is considered a clinical emergency: NOTIFY YOUR SUPERVISOR**

1. If your supervisor is not immediately available, reach the other licensed Naropa Counseling Services staff.
2. Keep the person present until they can be assessed by the licensed clinician.

CONTACT:

Joy Redstone, LCSW
Director of Counseling Services
Office: 303-546-3570
Cell: 303-503-9755
jredstone@naropa.edu

Jo-Lynn Park, MA, LPC
Manager of Student Counseling Center
Assistant Director of Counseling Services
Office: 303-245-4633
Cell: 970-759-8227
jpark@naropa.edu

Brooks Witter, MA, LPC
Clinical Supervisor
303-641-2320
bwitter2@naropa.edu

Options For Disposition

OPTION 1 **Situation resolves with a safety contract.**

OPTION 2 **Situation resolves with a plan for extra support.**

Plan For Extra Support:

1. Emergency sessions with yourself and/or Joy/Jo-Lynn.
2. Consider getting permission to contact supports in that person's life.
3. Document plan specifically in chart.

OPTION 3 **Person is evaluated for hospitalization**

1. Can be done by supervisors or by mobile crisis team: **(303) 447-1665**
2. Mobile crisis team can refer to a Crisis Stabilization Unit.
3. For more urgent cases, dispatch should be called: **(303) 441-3333**

If dispatch is called, be aware that this will bring police cars onto campus or the community center site. It is police protocol to use handcuffs.

- Security/Safety and Student Affairs should be notified when the person is on campus (please see below).
- If a person reports already ingesting a substance that could be dangerous, they must go to the ER for medical clearance.
- They will transport the person to the ER for evaluation.

1. Command auditory hallucinations are *always* cause for grave concern.
2. "Grave disability" is another category for possible hospitalization, but it's very hard to meet this criteria.

Tarasoff Warning

Hospitalization may preclude our need to break confidentiality. Tarasoff warnings are a very delicate legal and ethical situation that will require consultation with your supervisor, and for your supervisor to seek legal consultation.

You may or may not wish to tell the client about this legal obligation during the agitated episode, as your safety is paramount. Remember, this is covered in the informed consent process. However, generally speaking, transparency during any hospitalization or mandated breach of confidentiality is advised. The take away: GET CONSULTATION!

Quick Reference: Referrals

If a client is beyond our scope of service, please reference our Resource Guide located in the appendix of this manual. There you will find a list of licensed therapists and organizations in the community.

Insurance CARD

Use the website on the back of their card.

Limited FINANCIAL RESOURCES

+

Addiction ISSUES

Specialized CARE

Consult with your supervisor.

Examples: head injury & serious medical illness with emotional/psychological impact

Mental Health Partners: 303.443.8500

People's Clinic: 303.449.6050

Boulder Emotional Wellness: 303.225.2708

Counseling Cooperative: 720.381.6089

For INPATIENT CARE:

- ARC: 303.441.1281

For OUTPATIENT CARE:

- ARC: 303.441.1275
- BAEC: 303.444.6142

CONSIDER REFERRAL TO:

- AA: 303.447.8201
- NA: 303.412.2884
- Heart of Recovery at Shambhala Center: 303.444.0190

Substantial FINANCIAL RESOURCES

+

Addiction ISSUES

CONSIDER REFERRAL TO:

- AA
- NA
- Heart of Recovery at Shambhala Center

Paying OUT-OF-POCKET:

Use Psychology Today to find a licensed therapist

For INPATIENT CARE:

- Harmony: 866.686.7867
- Dual diagnosis unit covered by insurance

For OUTPATIENT CARE:

- BAEC: 303.449.1566
- Center for Change: 303.449.1566

STUDENTS:

- CU Recovery Center: 303.492.9642

Naropa University
COUNSELING SERVICES

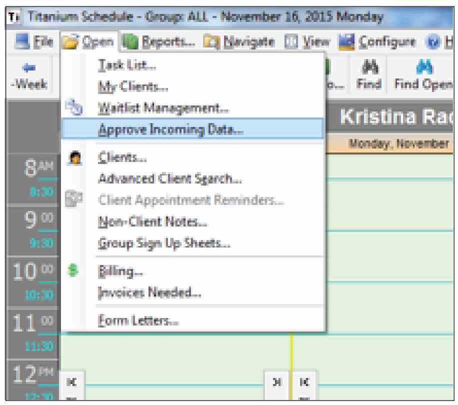
Section 3
Financial/Titanium Instructions

Titanium • Deposit • Cash & Credit Card Transactions • Payment Codes

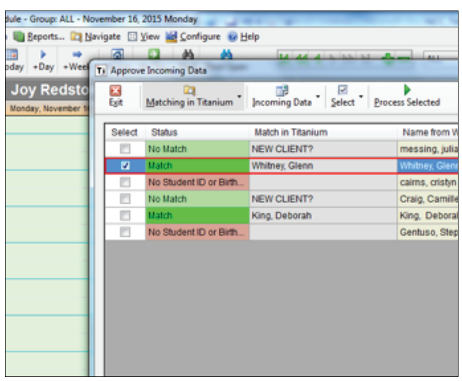
Processing New Client

After a new client has completed their Intake, you will have to process their information in order to create an appointment and later bill your client.

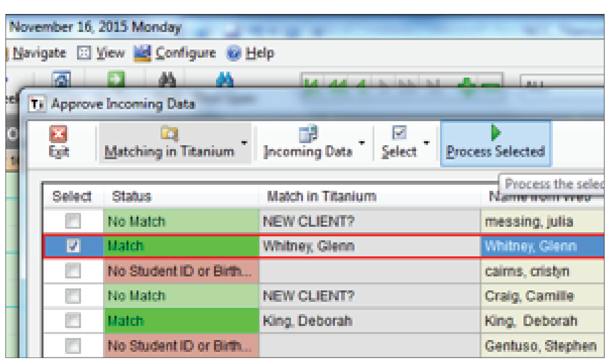
Click **Open** (top tab) > Approve Incoming Data



Select **Client (check mark)**



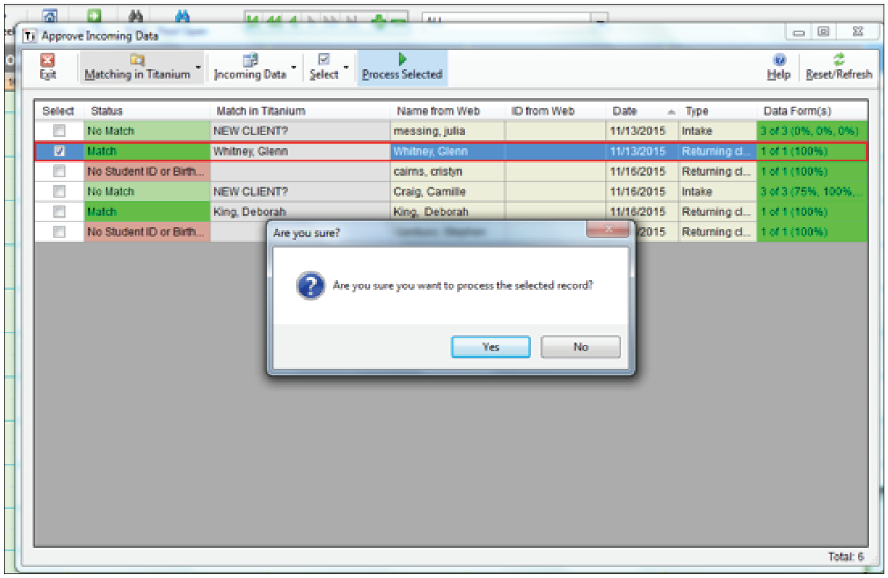
Click **Process Selected**



Are you sure you want to process the selected record?

Click **Yes**.

The new client will now be in the system.

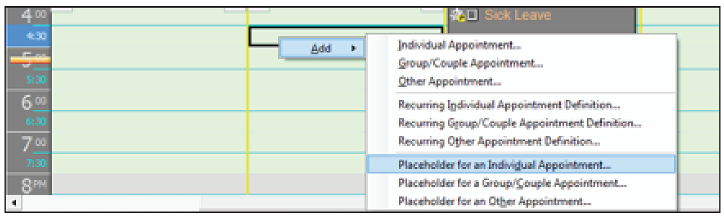


Adding a Placeholder

When a client is new or if you have a student client, you will want to create a placeholder in Titanium.

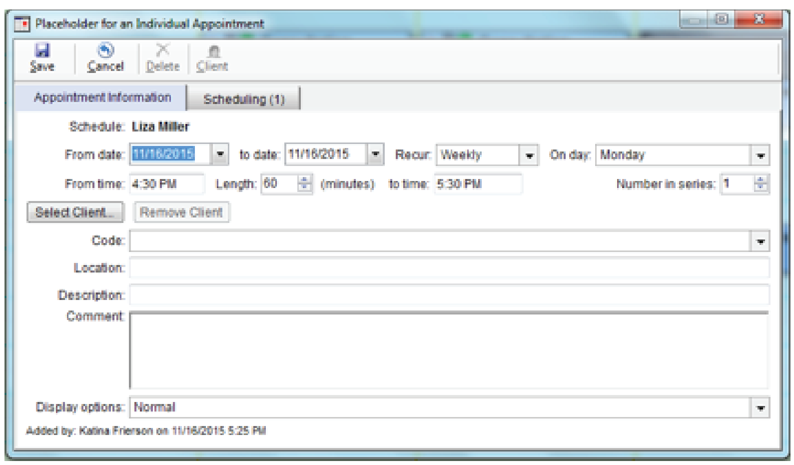
Right-Click the time slot where you would like to put your placeholder.

Select **Placeholder for an Individual Appointment**.

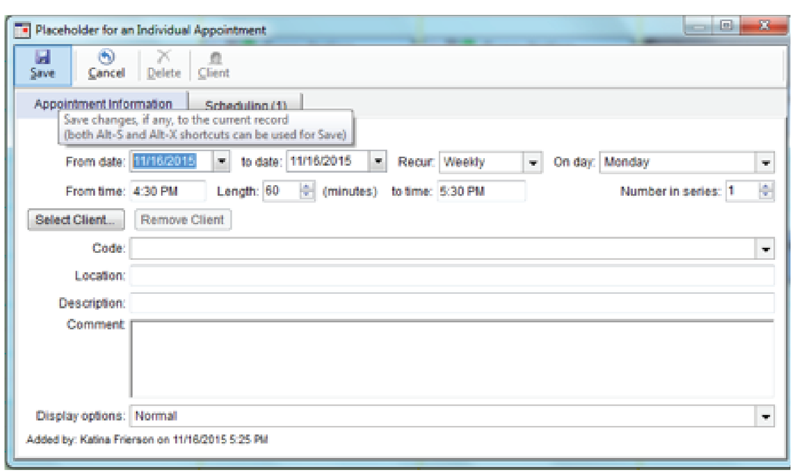


Input Length, Time and CODE.

PLEASE NOTE:
If this is a new client, the Code will be either Intake 1 - 4, depending on what the client can afford.



Click **Save**.



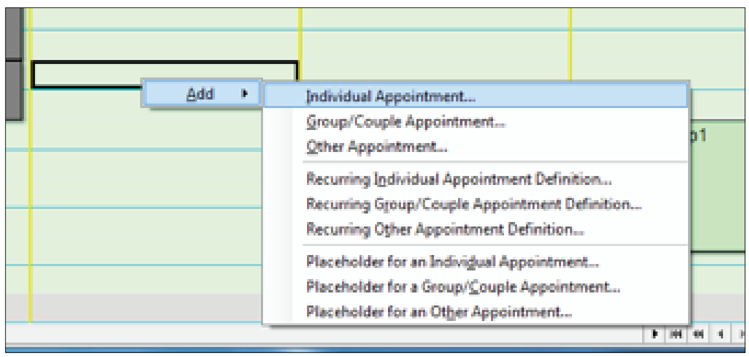
Placeholder will be gray and in the correct time slot.

Adding an Appointment

Once a new client has shown up to their first appointment, and completed their Intake, their Placeholder will need to be changed into a permanent appointment.

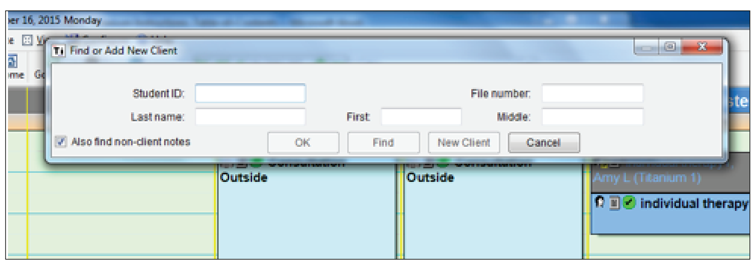
Right-Click in the time slot where you would like to put your appointment.

Select **Individual Appointment**

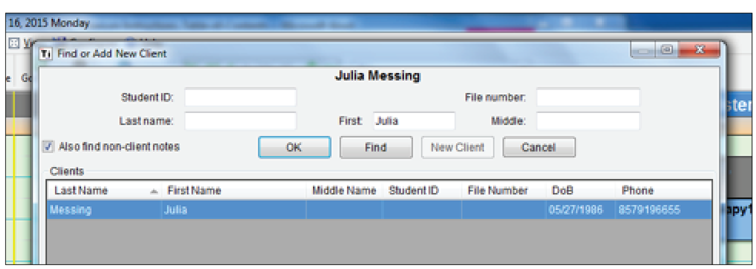


Type in either first or last name of client.

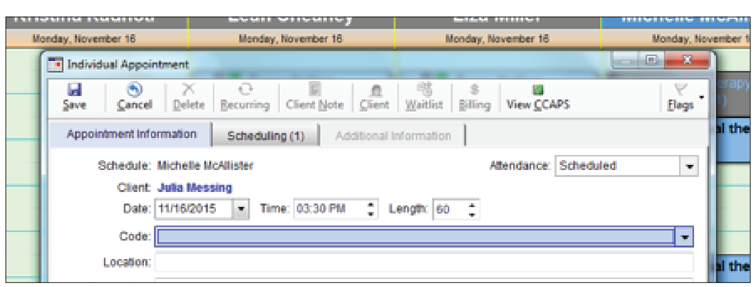
Click **Find** or hit **Return**



Double-Click on client name (blue highlighted bar)

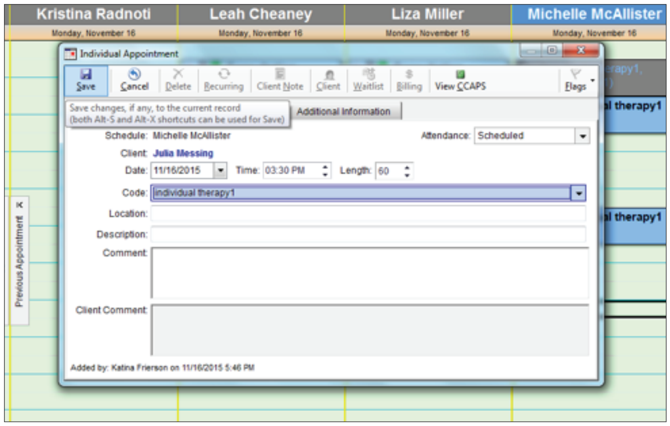


Input **Length, Time** and **CODE**



Click **Save**

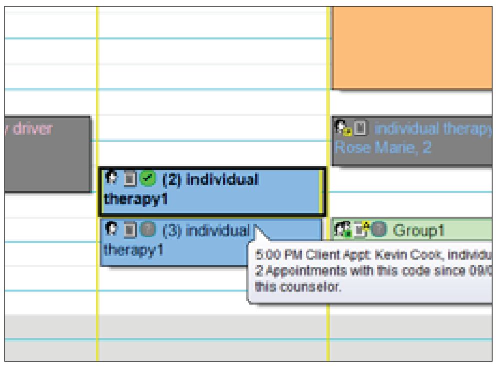
Appointment will be blue and in the correct time slot.



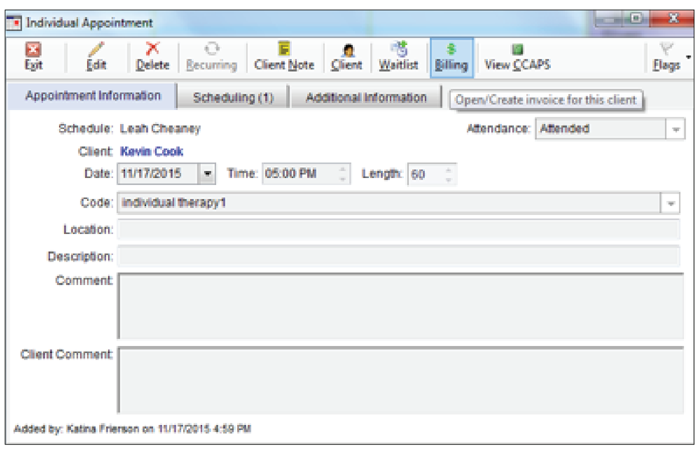
Billing

Once a client has finished their session, you will have to either record whether a payment was made with cash, a check or credit card.

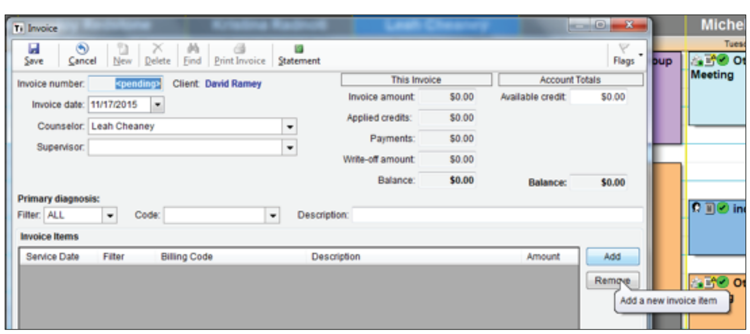
Double-Click on an Individual Appointment block **(highlighted blue)**



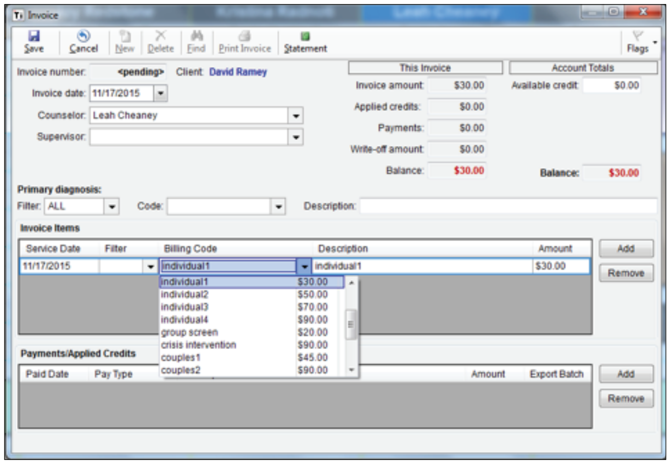
Click on **Billing** in top navigation



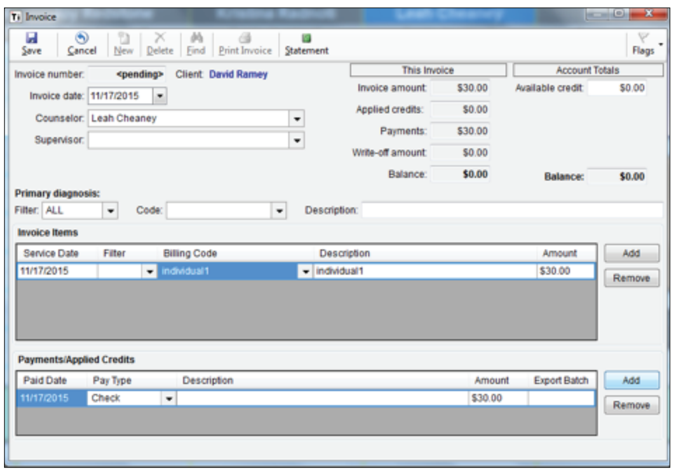
Click **Add** on right of Invoice Items field



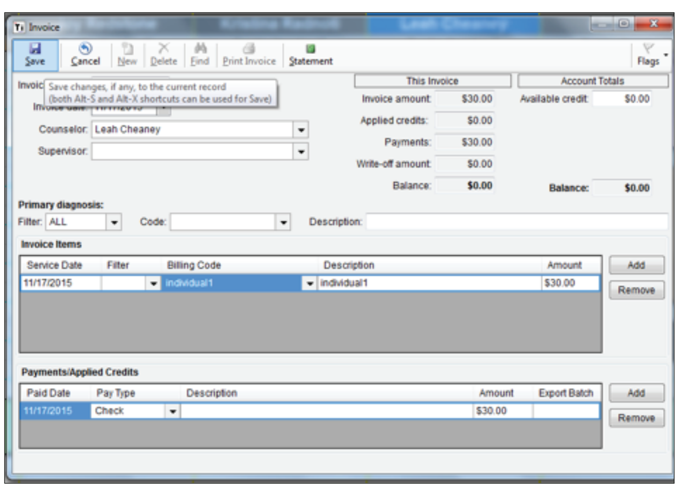
Select correct **Billing Code**



Select correct **Payment Type**



Click **Save** on top navigation



Adding a Scanned File

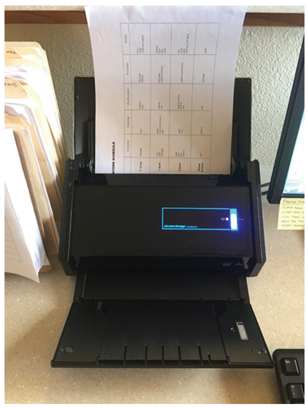
Steps to attach any document to a client's file.

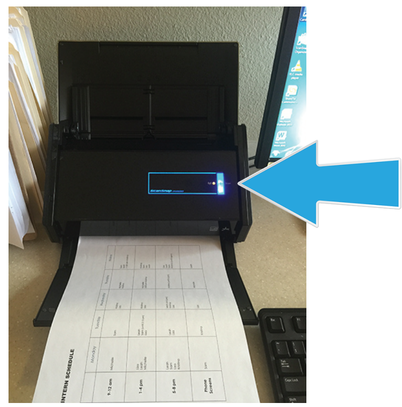
Put document(s) face up or down in scanner.

Press bright blue **Scan** button

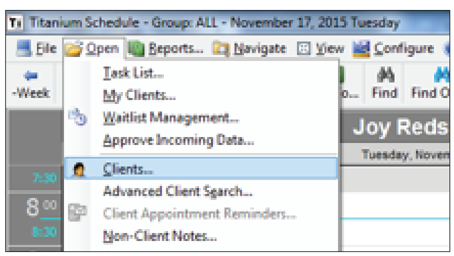
Select **Scan to Folder**

PLEASE NOTE
You can save to your desktop until a folder has been created.



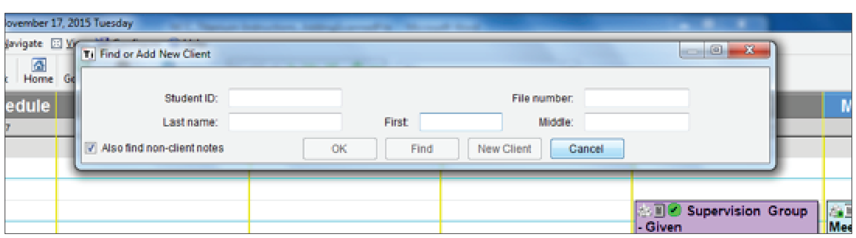


In Titanium, Click **Open** > **Clients**

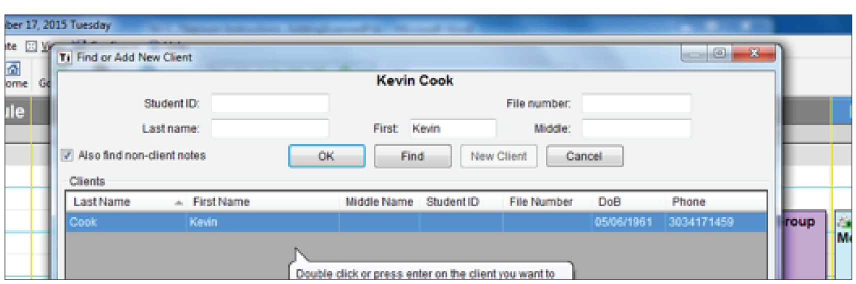


Find or Add New Client dialogue box will open.

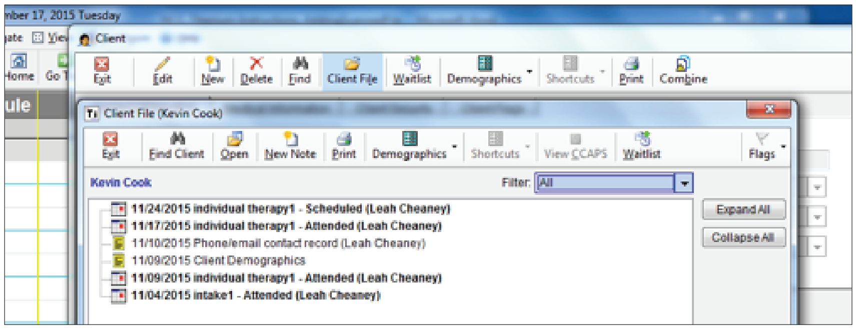
Key in first or last name, then click **Find** or hit return.



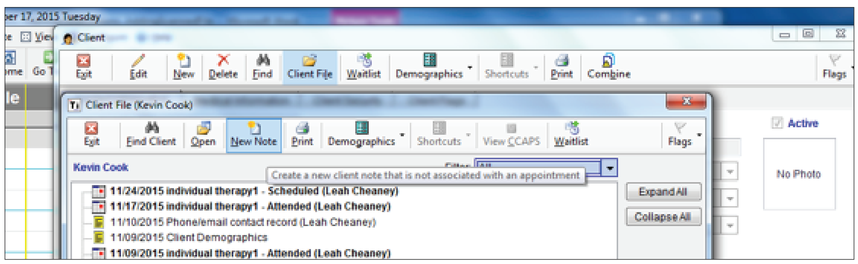
Double-Click name



Click **Client File** on top toolbar

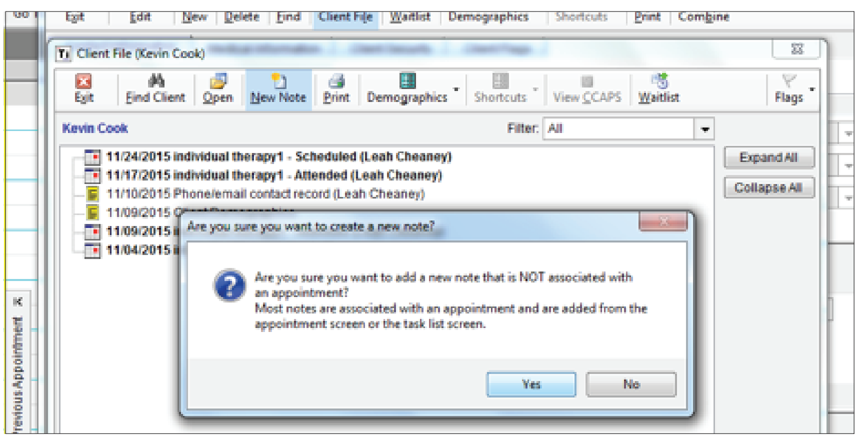


Click **New Note**

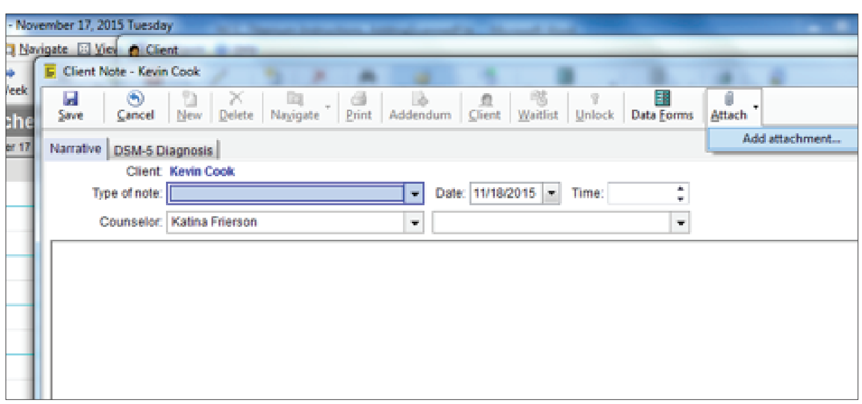


'Are you sure you want to create a new note?' dialogue box will open.

Click **Yes.**

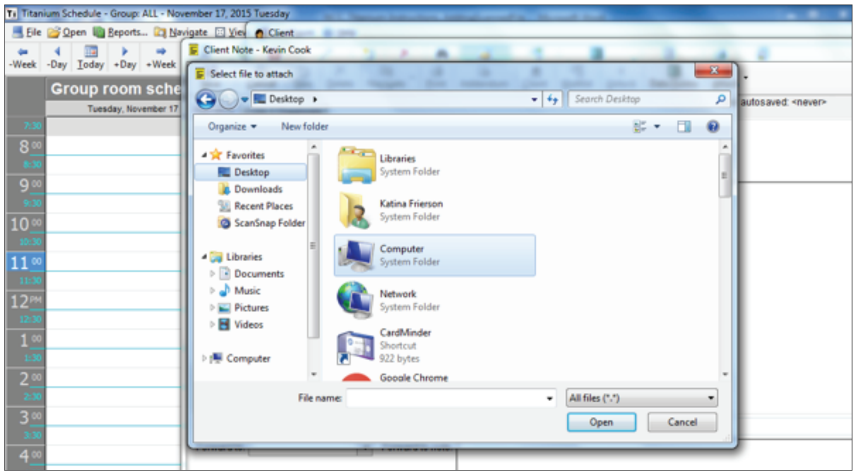


Click **Attach** > **Add attachment**

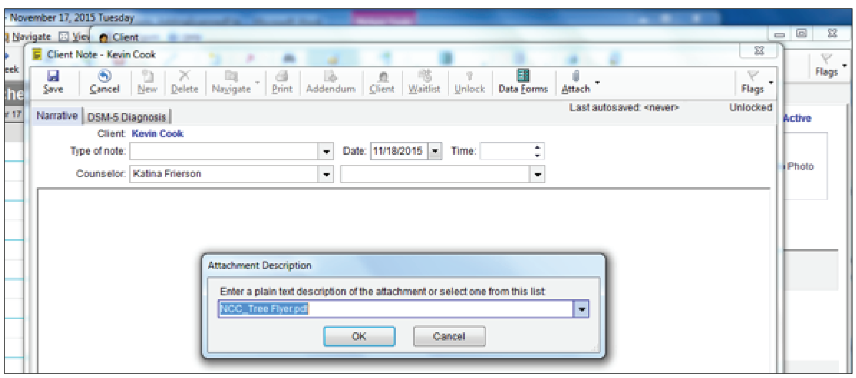


Browse for file to attach.

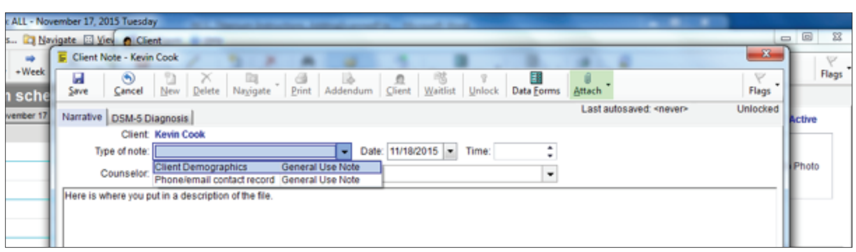
Click **Open**.



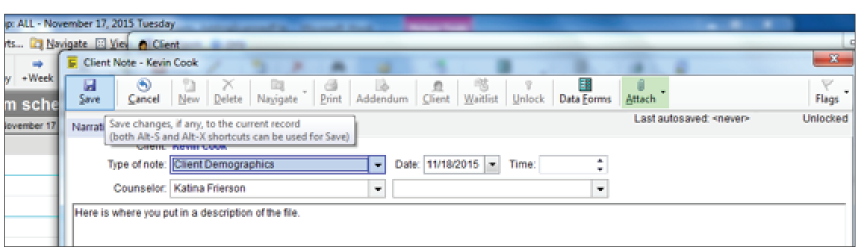
Enter a plain text description of the attachment



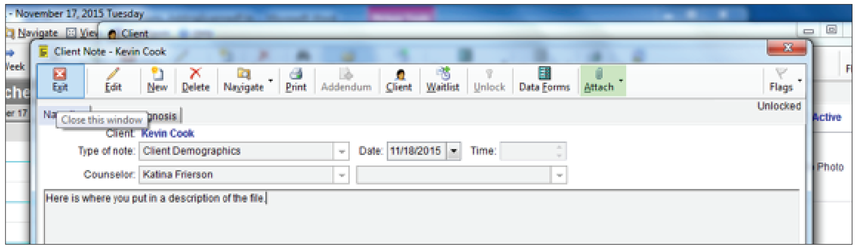
Select **Type of Note** then put in a brief description



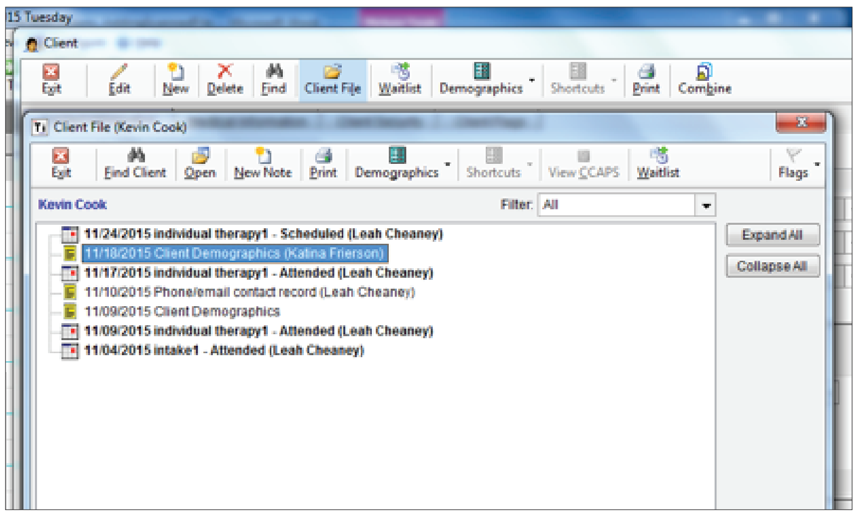
Click **Save**



Click **Exit**



The scanned file will now show up on the client file list

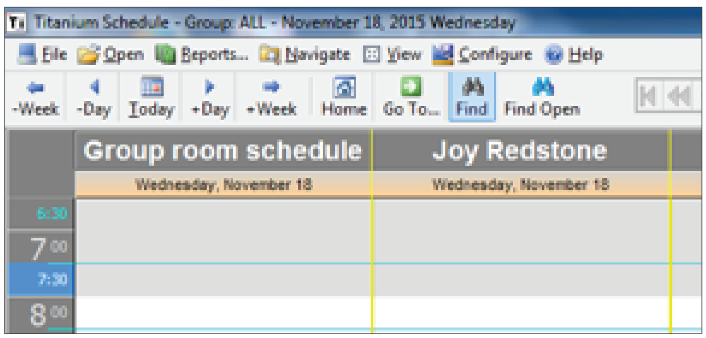


Finding & Editing

If you need to find a specific client or make changes to a client's file, use the find or edit functions.

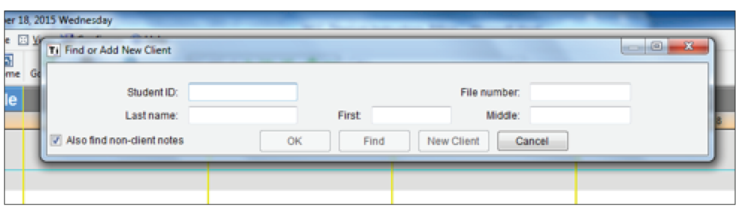
TO FIND A CLIENT

To find a specific client file, click **Find** (w/binoculars symbol) in toolbar



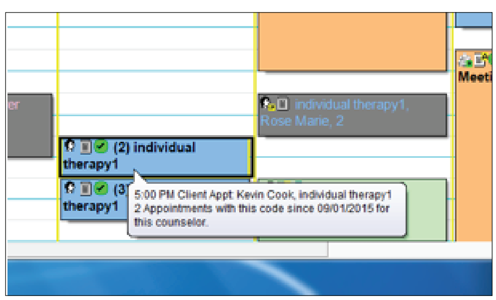
Find or *Add New Client* box will open.

Key in either first or last name and click **Find** or **hit** Enter.



TO EDIT A CLIENT FILE

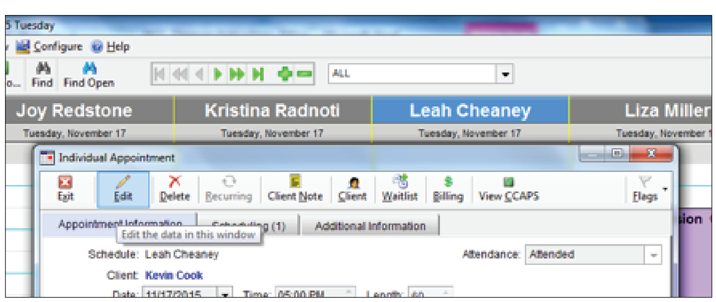
Double-Click on an **Appointment Box** (ie. labeled either individual therapy 1, 2, 3, 4)



Individual Appointment box will open.

Edit (w/pencil symbol) will be in the toolbar.

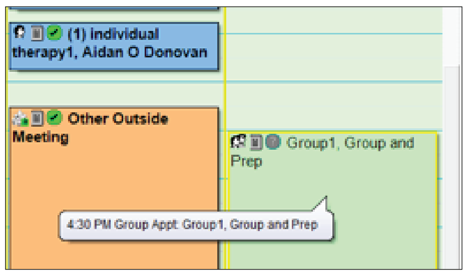
Click **Edit** to change Attendance, Code, Date, Time and Length)



Adding Clients to a Group

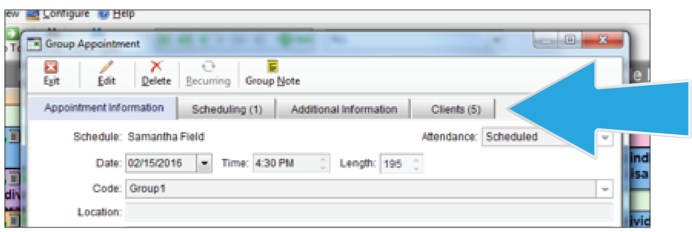
Click on **Group**

NOTE: Take the same steps to create a group as a placeholder or an appointment. Simply select 'Group' in menu.

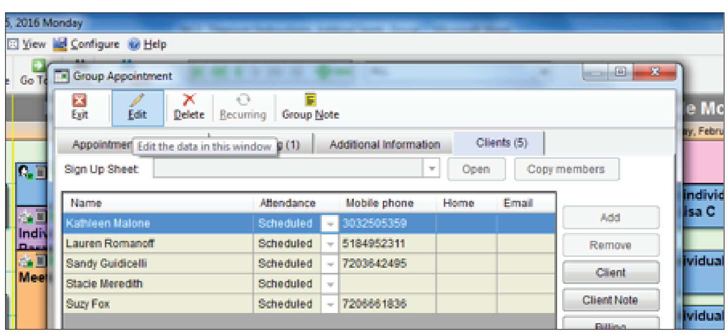


Group Appointment dialogue box will open

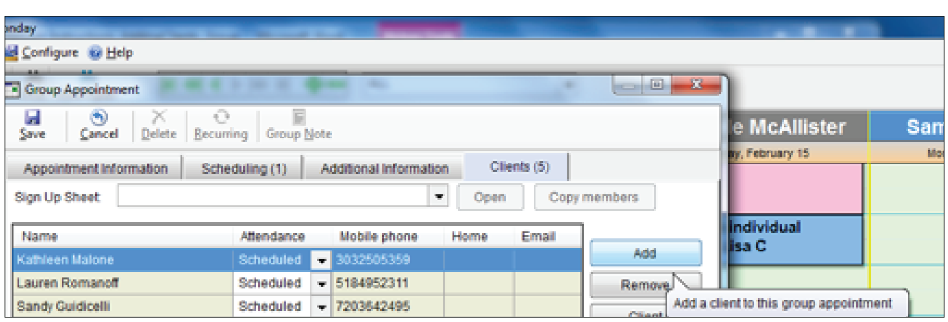
Click last tab that says **Clients**



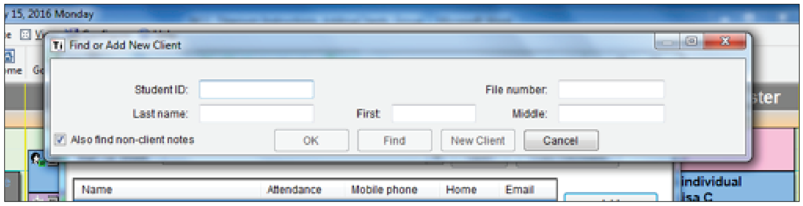
Click **Edit**



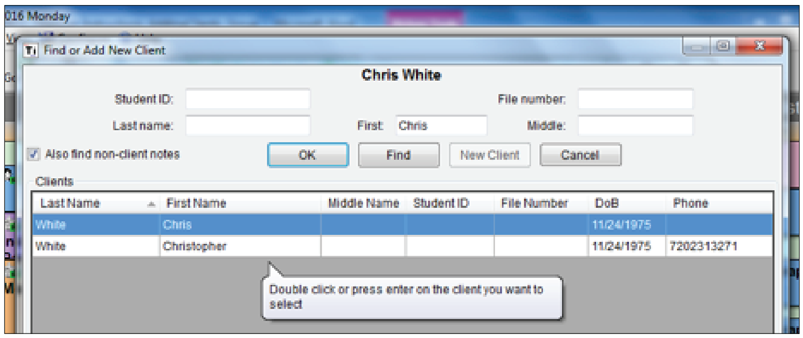
Click **Add**



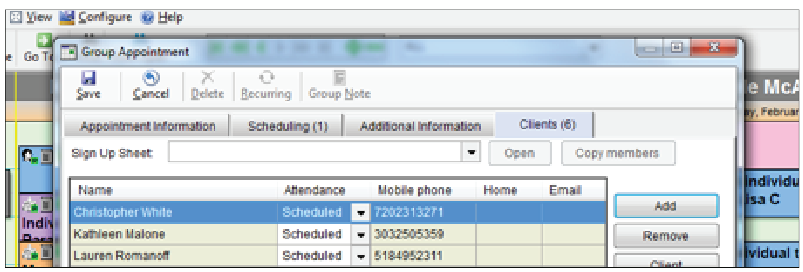
Search for Client



Double-click on name.



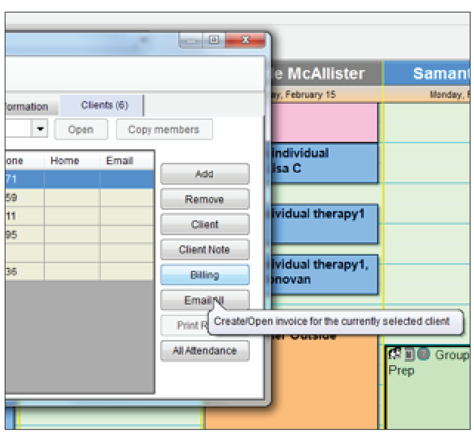
Name will automatically be added to the list

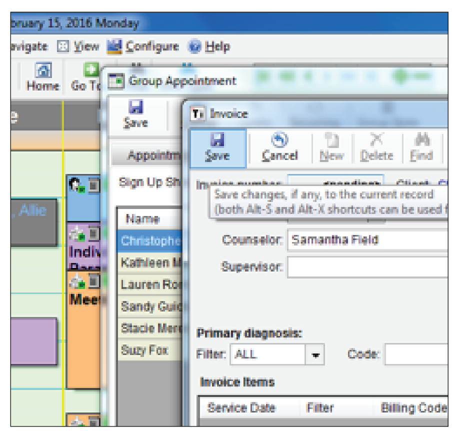


Click **Billing** to add payment

Reference Billing Section on page 29.

Click **Save**



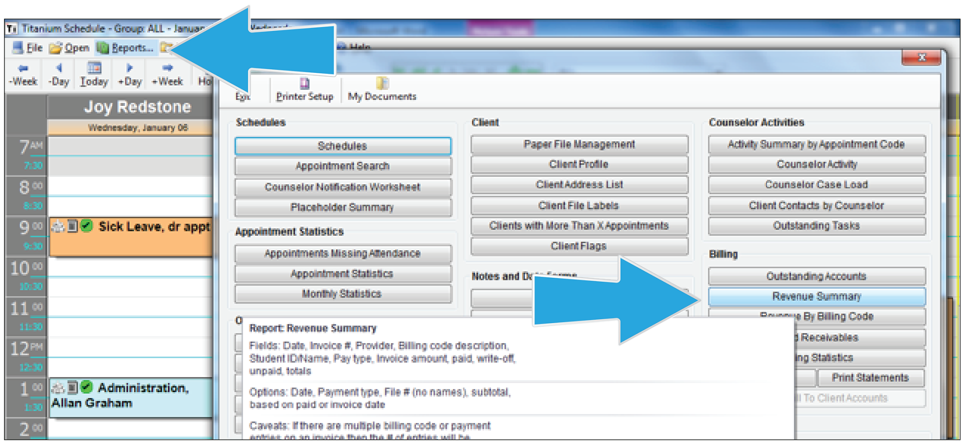


Revenue Summary Report

At closing, you will need to generate a report that lists all the transactions for the day.

Click **Reports** (top tab)

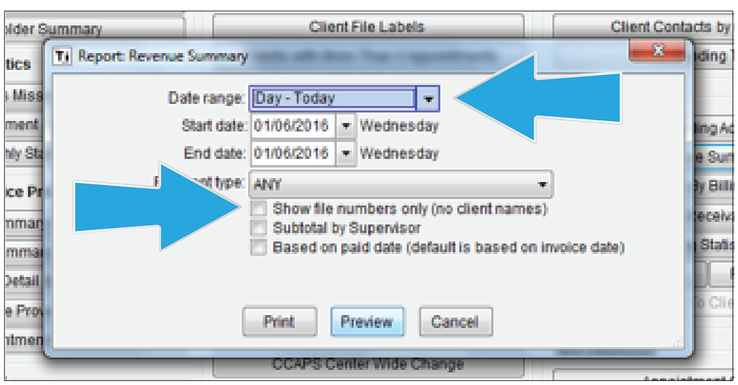
Select **Revenue Summary**



Select **Today** or a date range

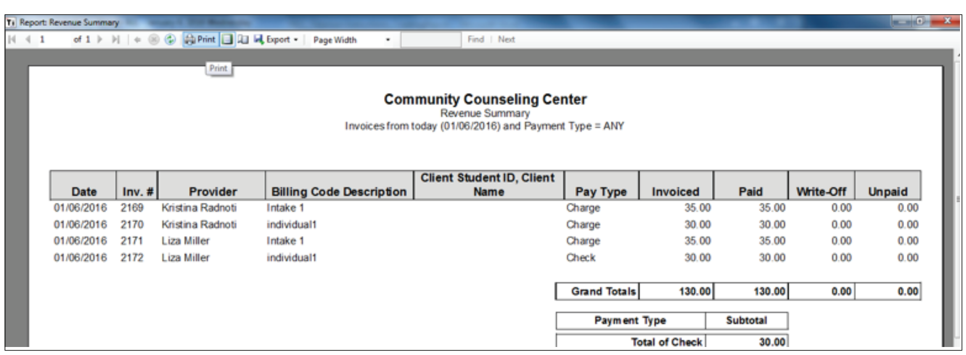
Select *Show file numbers only (no client names)*

Click **Preview**



Check Transactions against all charges, checks and cash received

Click **Print** (top tab/toolbar)



Community Counseling Center
Revenue Summary
Invoices from today (01/06/2016) and Payment Type = ANY

Date	Inv. #	Provider	Billing Code Description	Client Student ID, Client Name	Pay Type	Invoiced	Paid	Write-Off	Unpaid
01/06/2016	2169	Kristina Radnoti	Intake 1		Charge	35.00	35.00	0.00	0.00
01/06/2016	2170	Kristina Radnoti	individual1		Charge	30.00	30.00	0.00	0.00
01/06/2016	2171	Liza Miller	Intake 1		Charge	35.00	35.00	0.00	0.00
01/06/2016	2172	Liza Miller	individual1		Check	30.00	30.00	0.00	0.00
					Grand Totals	130.00	130.00	0.00	0.00

Payment Type	Subtotal
Total of Check	30.00

Creating a Deposit

At closing, after printing the Revenue Summary Report, you will have to assemble all credit card, cash and check payments into a deposit for pickup.

In this section we will cover:

- ✓ Settlement of Credit Card Machine
- ✓ Assembling Transactions for Deposit

Batching Out Credit Card Machine

STEP 1 Hit 7

STEP 2 Then Yes for Close Batch and Deposit Funds

STEP 3 Yes again to Print

STEP 4 Put settlement report on top of all credit card transactions

Assembling Transactions for Deposit

After Printing Revenue Summary Report (pg. 38):

1. Make sure all cash and checks are in envelopes and labeled.
2. Place credit card transactions and credit card settlement report on top of all envelopes.
3. Paper clip
4. Fold Revenue Summary Report into thirds.
5. Put all transactions in folded report.
6. Place into empty money bag labeled either Larry, Curly or Moe.
7. Lock money bag.
8. Lock drawer

Financial Instructions: Cash & Credit Card Transactions

In this section we will cover:

- ✓ Overview of Payment Steps
- ✓ Cash Transactions
- ✓ Credit Card Transactions

REMEMBER:
You MUST go to Billing Screen. If you don't manually add the charge, there is no way of tracking payment.

Overview of Payment Steps

1. Take out the placeholder in Titanium and replace with apt
2. Mark appt. attended
3. Right click on appt., drop down menu appears with billing as an option
4. Click on Billing (review section on pg. 29)
5. You do not need to use the envelope unless the payment isby check or cash
6. Put inside bank bag

Cash Transactions

When a potential client calls the center for our services:

STEP 1 Take the amount, and use petty cash to make change.
STEP 2 Replace the amount you take out with the amount you put in.
STEP 3 Give the client the correct change.
STEP 4 Put the amount we receive in an envelope, client name or initials hours, and place in money bag.
STEP 5 If the client wants a receipt, click **Print Statement** in top navigation.

Credit Card Transactions

- To start the process, hit the green button on the larger machine
- Choose **Credit**, press 1
- Enter the correct amount on the keypad of the larger machine
- When prompted, swipe or insert into the smaller machine
- It will first print a receipt for the client to sign, then a receipt for the client
- Give them the customer copy receipt

PLEASE NOTE:
Retain the signed copy of the credit card slip for us!

Payment Codes & Prices

A client's payment will be determined during their initial phone screening. The first session, their intake, is always $5.00 more.

Payment Codes and Prices

First Session Only - Intake

Intake 1	**$35.00**
Intake 2	**$55.00**
Intake 3	**$75.00**
Intake 4	**$95.00**

MOST COMMON PAYMENT CODES & PRICES

Individual 1	**60 min.**	**$30.00/session (most common code)**
Individual 2	**60 min.**	**$50.00/session**
Individual 3	**60 min.**	**$70.00/session**
Individual 4	**60 min.**	**$90.00/session**

Individual 1	**90 min.**	**$45.00/session**
Individual 2	**90 min.**	**$75.00/session**
Individual 3	**90 min.**	**$105.00/session**
Individual 4	**90 min.**	**$135.00/session**

Additional Payment Codes & Prices

Couples 1	60 min.	**$45.00**
Couples 2	60 min.	**$90.00**
Couples 1	90 min.	**$65.00**
Couples 2	90 min.	**$135.00**
Group Screen		**$90.00**
Group 1		**$25.00**
Group 2		**$50.00**
6-week Group Package @ $25.00		**$150.00**
6-week Group Package @ $50.00		**$300.00**
Crisis Intervention		**$90.00**
Returned Check Fee		**$20.00**