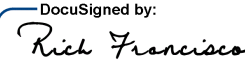




Procedure Title: Coordination of Care with Primary Care Physician from Intake through Discharge	Procedure #: 06-011	<u>Review Dates</u>	
Category: Clinical Subject: Coordination of Care with Primary Care Physician from Intake through Discharge	Prepared by: Name: Christy LaDronka, LMSW CAADC Title: Chief Clinical Officer Approved by: DocuSigned by:  AA7EBD48ABB04A3... Rich Francisco, Executive Director	08/06/2025	
Effective Date: 10/08/1999	Last Revised Date: 07/14/2026		

I. PURPOSE

HealthWest shall provide specific documentation to the primary care provider after a referral is made on an individual, they are serving through the end of the treatment episode/discharge.

II. APPLICATION

This procedure applies to all HealthWest service programs/employees.

III. PROCEDURE

- A. When HealthWest receives a referral for services from a primary care provider, the HealthWest Access or Warmline staff will provide the agency's hours for a "walk-in" Brief Screen.
- B. HealthWest staff will request medical records from the primary care provider's office at the time of the initial appointment and annually thereafter. Nursing staff will also be forwarded the completed Biopsychosocial Assessment for review after the consumer's initial appointment and on an annual basis. The nurse will follow up with the primary care provider for any physical health issues documented on the Biopsychosocial Assessment.
- C. Documentation related to the consumer's episode of treatment will be forwarded to the primary care provider by the HealthWest support staff. Such documentation includes, but is not limited to, psychiatric evaluations and medication reviews, etc. The process established in Policy and Procedure No. 04-002; "Disclosure of Consumer Information" will be followed.
- D. When a decision is made to discharge a consumer from HealthWest services, the primary worker must assure accommodations are made for a smooth transition to the individual's primary care provider:
 - i. Whenever possible, the primary worker/team nurse will contact the primary care provider to begin the transition process, to include identifying the medication

monitoring needs of the consumer. Additionally, they will schedule an appointment with the primary care provider prior to the discharge. If the primary care provider's office expresses concerns related to assumption of the medication monitoring, the primary worker/team nurse will make arrangements to attend the first appointment at the primary care provider's office.

- ii. When completing the Discharge Summary, the primary worker will ensure all areas of the document are completed. Additionally, whenever possible, the Discharge Summary must also include an appointment date with the primary care physician's office.
 - iii. When the Discharge Summary is processed by support staff, a copy of the Plan will be forwarded to the primary care provider.
- E. Should a consumer need a follow-up appointment at HealthWest after being discharged from services for either a medication change or an adjustment to an anti-psychotic medication, the HealthWest Medical Director/ previous provider will be available to provide a one-time consultation as needed.

Authors Initials CL/