



## Preadmission Screening Process in TIER<sup>®</sup> Workflow<sup>®</sup>

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### Discussion

Most organizations have developed methods to prescreen referrals and new admissions into their organization. A well-designed preadmission screening process is an important case management resource to help prospective clients or referral resources determine if the organization can meet their needs and to make appropriate referrals to other resources if the organization is not the appropriate treatment setting or lacks the services needed by the prospective client.

Accreditation organizations such as JCAHO, CARF, and COA require that organizations formalize a process to determine appropriateness of admission and treatment setting as well as specify criteria to be used by clinical staff during the prescreening process. Naturally, the preadmission screening process can be expedited or bypassed if the individual is experiencing a crisis that warrants immediate admission in accordance with the organization's intake process.

However, under normal or ideal circumstances, each prospective client should be prescreened. To facilitate this process, the Service Delivery module of TIER<sup>®</sup> Workflow includes a Preadmission Screening form that can be used by staff. The face sheet and pages of this form follow:

A screenshot of a software application window titled "Preadmission Screening". The window has a blue title bar and standard Windows window controls. Below the title bar is a menu bar with "Options" and a toolbar with icons for help, print, and save. A yellow bar contains "Save" and "Cancel" buttons. The main area has a tabbed interface with "Referral Information" selected. Below the tabs are input fields for "Contact Date", "Screening Date", and "Screen Staff". The "Referral" section contains fields for "Referral Source", "Organization", "Contact", "Address", "City", "State", "Zip", "Telephone", and "Screening Contact Location", along with "Add New" and "Edit" buttons. The "Reason for Referral Due to" section has checkboxes for "Mental Health Problems", "Substance Abuse Problems", "Other", "Homicidal Thoughts", and "Suicidal Thoughts". The "Crisis Status on Preadmission Screening" section has radio buttons for "Mild", "Moderate", "Significant", and "Urgent".

**Preadmission Screening**

Options

Save Cancel

Referral Information | **Presenting Problem/History** | Insurance/Recommendations | Follow Up Contact

Presenting Problem (Briefly Describe)

History of Presenting Problem and Treatment (Briefly Describe)

Physician

Name

Date of Last Medical Visit

Date of Last Hospitalization

If Physician not found

**Add New Physician**

**Preadmission Screening**

Options

Save Cancel

Referral Information | Presenting Problem/History | **Insurance/Recommendations** | Follow Up Contact

Insurance

**Add**

Payor Name	Plan	Insurance No.	Start Date	End Date

Recommendations

Preadmission Summary

**Add Referral** **Scheduler**

Projected Level of Care

UR Type  Next UR Review Date

Basic prescreening information is included under each of the five tabs of the form. If the screener checks that the reason for referral is due to homicidal or suicidal thoughts, the selected reason will automatically bring forward the related assessment so that the screener can expand the preadmission process to include the lethality assessment needed.

In addition, once information is entered into fields on the “presenting problem/history” tab, this information will automatically be initialized to the Intake form if the individual is subsequently admitted. Similarly, all necessary insurance information that is gathered during preadmission is also linked to the TIER<sup>®</sup> Billing module and used to obtain authorizations from the funding source. The Preadmission Screening form is also used to track referrals to the organization as well as referrals to other organizations if admission is not recommended. Staff can also initiate development of a treatment contract with the client, if needed, as well as schedule follow up contacts with the prospective client and/or referral source to be sure that recommendations for treatment are followed.

Reports in TIER<sup>®</sup> Workflow summarize basic information such as types of referrals, reasons for referral and outcomes. Staff can also use TIER<sup>®</sup>'s dynamic drill down reports to set up data queries related to preadmission screening activities. For example, a drill down may be useful to track volume and type of referrals to a particular program or by type of client.

## Conclusion

TIER<sup>®</sup>'s Preadmission Screening form is designed to be a useful tool to assist staff with effective screening and preliminary assignment of clients to appropriate levels of care and program settings. Final assignment can then be made after a more complete intake evaluation using the Intake Assessment form. The form can be modified to include fields and specific information required by the organization and its referral and funding sources.