MENTAL HEALTH & THERAPY · INTAKE OPERATIONS

Patient intake and assessment processing

Automates new patient intake from initial form submission through complete assessment processing, creating treatment-ready patient records while ensuring HIPAA compliance. Streamlines the onboarding process and reduces administrative burden on clinical staff.

01 WORKFLOW TRIGGER

New patient submits intake form through practice portal

BLUEPRINT OVERVIEW

What this workflow accomplishes

This workflow connects the practice portal intake form in SimplePractice to Therabill eligibility checks, TherapyNotes and TheraNest documentation, and the clinician's schedule. Automation handles data capture, benefits verification, risk screening, draft treatment planning, booking, and note scaffolding. Licensed clinicians retain authority over risk determination, diagnosis, treatment plan approval, and any clinical contact with the patient.

01

OUTPUTS

Complete intake chart with assessment, Booked first appointment, Verified benefits and billing setup, Urgency classification on record, Draft treatment recommendations

02

SUCCESS MEASURES

Intake processing time, Eligibility verification accuracy, Crisis indicator detection rate, Time to first appointment

03

CORE SYSTEMS

SimplePractice, Therabill, TherapyNotes, TheraNest, Psychology Today

HOW TO USE THIS BLUEPRINT

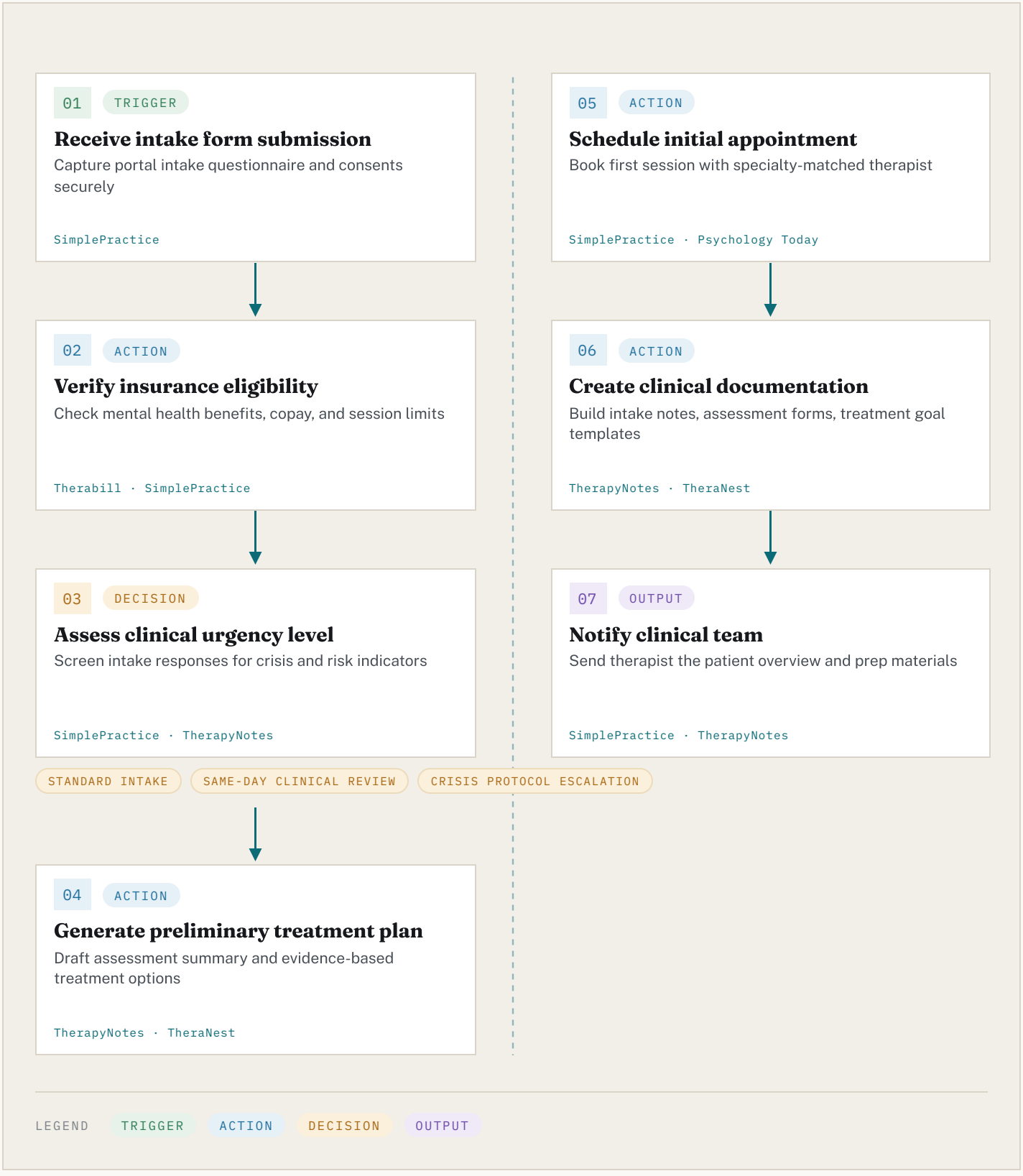
Practice owners: read the stage map and confirm the urgency routing rules match your crisis protocol and after-hours coverage.

Clinical staff: use the control points to see exactly where your signature, licensure, and clinical judgment are required before anything reaches a patient.

Implementers: build to the checks panel, especially role-based chart access, minimum necessary disclosure, and audit logging in SimplePractice and TherapyNotes.

End-to-end stage map

Seven stages carry a new patient from portal submission to a treatment-ready chart on the assigned therapist's caseload. The decision point at stage three governs whether the case follows standard intake or is pulled into same-day crisis review.



IMPLEMENTATION DETAIL

Stage-by-stage breakdown

Each stage states the operational intent, the human control point, and the systems likely to take part. System names are examples, not a required architecture.

01 TRIGGER

Receive intake form submission

Patient completes and submits initial intake questionnaire with personal information, insurance details, and presenting concerns. Form data is captured securely in HIPAA-compliant system.

CONTROL POINT

The intake coordinator confirms consent forms and release of information are signed and legible before the record advances.

SYSTEMS SimplePractice

02 ACTION

Verify insurance eligibility

System automatically checks patient insurance coverage and benefits for mental health services. Retrieves copay amounts, deductible status, and session limits.

CONTROL POINT

Billing staff review any eligibility response that returns inactive, out of network, or partial benefits before the patient is quoted a copay.

SYSTEMS Therabill SimplePractice

03 DECISION

Assess clinical urgency level

AI analyzes intake responses for crisis indicators, suicidal ideation, or severe symptoms requiring immediate attention. Routes high-risk cases for priority review.

CONTROL POINT

A licensed clinician, not the model, makes the final risk determination and can override the routing in either direction.

SYSTEMS SimplePractice TherapyNotes

04 ACTION

Generate preliminary treatment plan

System creates initial assessment summary and suggested treatment approaches based on presenting symptoms and evidence-based practices. Flags potential diagnoses for clinician review.

CONTROL POINT

The assigned therapist reviews and edits every suggested diagnosis and goal; no diagnostic code is entered without clinician sign-off.

SYSTEMS TherapyNotes TheraNest

COMPLETION AND MEASUREMENT

Closing stages and results

The closing stages build the chart, book the hour, and put a prepared clinician in the room with an accurate risk picture.

05 ACTION

Schedule initial appointment

Automatically books first available appointment slot with appropriate therapist based on specialty match and availability. Sends confirmation with intake paperwork to patient.

CONTROL POINT

The scheduler confirms the match against the therapist's licensure, panel status, and current caseload before the confirmation sends.

SYSTEMS SimplePractice Psychology Today

06 ACTION

Create clinical documentation

Generates structured intake notes, assessment forms, and treatment goal templates in patient record. Ensures all documentation meets clinical standards and compliance requirements.

CONTROL POINT

The clinician signs the intake note; unsigned drafts remain locked and are not billable or releasable.

SYSTEMS TherapyNotes TheraNest

07 OUTPUT

Notify clinical team

Sends summary notification to assigned therapist with patient overview, urgency level, and pre-populated session preparation materials. Includes links to complete patient record.

CONTROL POINT

The supervising clinician confirms receipt on any high-urgency case and escalates if the assigned therapist has not acknowledged within the protocol window.

SYSTEMS SimplePractice TherapyNotes

DELIVERABLES

- Complete intake chart with assessment
- Booked first appointment
- Verified benefits and billing setup
- Urgency classification on record
- Draft treatment recommendations

KEY METRICS

- Intake processing time
- Eligibility verification accuracy
- Crisis indicator detection rate
- Time to first appointment

IMPLEMENTATION CHECKS

- Role-based PHI access by caseload
- Signed BAAs with each vendor
- Crisis alerts route to on-call
- Audit trail on every chart edit
- State retention rules on intake records

NEXT STEP

Turn this blueprint into an implementation plan.

Map each stage to your own systems, permissions, and approval routing before selecting tools or building automation.

packfoundry.app/assessment

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