

M E M O R A N D U M

Date: 6/5/17
To: All Supervisors and Managers
From: QCM
Subject: LOI Procedure for Supervisors and Managers
CC:

A Letter of Intent (LOI) is sent to a client when a change in services is being made, i.e. we are unable to reach client and may have to close client, client has a change in insurance and we can no longer serve them, client is going to a lower level of care, client no longer lives within the county, etc.

When a staff member creates an LOI, supervisors/managers must review them prior to being sent to the client.

1. Check for correct spelling and dates.
2. Review documentation in Clinician Gateway.
 - a. Confirm that client is no longer participating in ANY services, i.e. group, med support, crisis
 - b. Confirm that documentation matches what is written in the LOI (the LOI can be modified based on nature of circumstances and supervisors/managers must review that changes are accurate)
 - c. Confirm that case manager has attempted to contact client at least twice, prior to sending LOI
 - d. If client no showed for any scheduled appointments, confirm that staff attempted to contact client by phone, written letter or both
 - e. Confirm that LOI is written in client's primary language based on face sheet
3. Scan and email LOI to QCM to be logged.
4. Copy and paste into Imavisor under "Correspondence" tab.
5. Staff will then mail LOI to client at the address on file
 - a. The LOI should be mailed to the last known address, even if it is known that they no longer live there.

- b. If the client is homeless and does not have a mailing address, but staff know where client can be found, staff should attempt to hand deliver letter to client and document those attempts. If staff are unable to provide a hand delivery, staff can still proceed with closure and should document in Clinician Gateway that client is homeless and unable to be reached.