

Behavioral Health Services  
**Pathways to Well-Being**  
**Organizational Provider Intake Checklist**

**CERNER COMMUNITY BEHAVIORAL HEALTH**

- Complete Eligibility for Pathways to Well-Being and Enhanced Services form** in Cerner Community Behavioral Health (CCBH) within 30 days of intake for all clients 0-21 years old, with an open Child Welfare Services (CWS) case. The form is located under “Assessment Type.”
  - The Eligibility form is completed at intake, reassessment (during any noted changes throughout the course of treatment), and at discharge.
  - See Explanation for Eligibility for Pathways to Well-Being (PWB) and Enhanced Services form for step-by-step instructions on how to complete the form and how to enter the “Subclass” or “Class” designation under Client Categories Maintenance (CCM) in CCBH.

**CLIENT CATEGORIES MAINTENANCE REMINDERS**

- Click the “All” radio button** whenever viewing data in the CCM, this will reflect all current and previous Class or Subclass designations.
- Always tab** to a new row when entering information in CCM to ensure the data entered will be saved.
  - Start/end dates cannot be the same date or overlap.
  - Never delete any information in CCM.

**PATHWAYS TO WELL-BEING REQUIRED DOCUMENTATION**

- Verify the current Behavioral Health Assessment** reflects the client’s PWB status.
- Verify the current Client Plan** includes Intensive Care Coordination (ICC) or Intensive Home Based Services (IHBS) Service Codes for clients that receive these services.
- Complete the Pathways Progress Report to Child Welfare Services form** within 30 days of identifying a youth as PWB eligible, Class or Subclass, with all relevant forms attached.
- Fax to HEP OA** as instructed on the top of the Pathways to Well-Being Progress Report to Child Welfare Services form.

**PATHWAYS TO WELL-BEING ENHANCED SERVICES**

- Meet with the client and caregiver** to provide education on PWB, including the purpose of the Child and Family Team (CFT), CFT meetings, identify natural supports, etc.
- Contact Child Welfare Protective Services Worker** to discuss meeting focus and clear CFT members before scheduling CFT meeting.
- Submit referral to CFT Meeting Facilitation Program to coordinate and facilitate CFT meetings.**
- Initial CFT meeting must be held within 30 days** of identifying the client as eligible for Enhanced (Subclass) Services and then at a **minimum every 90 days thereafter.**
- CFT meeting Facilitation Program will complete CFT meeting Summary and Action Plan form** at each CFT meeting and provide a copy to all team members after each meeting.

**CERNER COMMUNITY BEHAVIORAL HEALTH REMINDERS FOR ENHANCED YOUTH**

- Complete Child and Family Team Meeting Note** for participation in all types of CFT meetings.
- When completing a service entry** for a CFT meeting, be sure to click the **EBP/SS button** and enter ID 92 CFT meeting for the service encounter.
- Complete Intensive Care Coordination (ICC) Note** to document any ICC service conducted outside of the CFT meeting.

This checklist refers only to Pathways to Well-Being and is not intended to replace or remove any other required procedures related to opening or closing client services at your specific agency. For current forms and additional Pathways to Well-Being resources: <http://theacademy.sdsu.edu/programs/bheta/pathways/>