



REFERRAL PROCESS

The following information is being provided to inform people making a referral to our agency on how we proceed with a case from initial contact with us to ending our involvement. Some helpful additional information is provided to allow Case Manager's and Agencies understand the process we follow as part of our service delivery.

Our Referral Process

Step #1 – Case Manager makes contact with Jon Freer, Program Director (218-839-9135), to inquire about making a referral for services. At this point, the case manager will discuss the case in detail about what the service needs for the client are etc.

Step #2 – Case Manager completes the Referral Form. They also obtain consent to release information to Behavior Wizards that may include the following information: most recent psychological evaluation, Individualized Education Plan (IEP), Individual Service Plan (ISP), Risk Management Plan (RMP), previous behavioral assessments, recent psychiatric reports etc. The case manager should focus on information that is valuable to allow Behavior Wizards to be most efficient at producing a behavior plan.

Step #3 – Case Manager **gets approval for funding** of our services and enters a Service Agreement.

Step #4 – All referral information is sent to Behavior Wizards **after funding is approved.**

Step #5 – Behavior Wizards will receive Referral Information at our main office in Baxter, MN. Each referral is taken on a “First Received First Served” basis.

Step #6 – Jon Freer – Program Director will contact Case Manager. During this discussion the Referral Form will be reviewed with Case Manager. The Case Manager will verify the funding mechanism used for services. **Jon and Case Manager will determine the goals for involvement by Behavior Wizards.**

Step #7 – The case will be referred out to a consultant within Behavior Wizards, and this consultant will call and arrange an Initial Meeting with Case Manager and Team Members. The case will be initially reviewed.

- Behavior Wizards asks for 200 units (50 hours) to begin a case. In general, 200 units will get us very close towards meeting the process outlined above. The behavior consultant will monitor units used and notify case manager of any need for additional units in advance of using them.
- Behavior Wizards only use funding stream found under the Waiver – that includes the MR/RC, CADI, CAC, TBI, CDCS, and Elder Waivers. We also use the Family Support Grant. We do not bill MA or Insurance Carriers for our services.
- Any funding stream providing less than 200 units (50 hours) of time – will get a variation of the referral process, and usually an outcome that will not meet the clients every need.
- All financial questions and billing information should be worked through our Financial Director – Kathie Headley – 218-828-0083. She will help case managers out to determine how to bill or arrange Service Agreements etc.
- It is the case manager’s responsibility to get funding approved prior to our involvement. We will not begin a case until funding has been approved.
- The start date of our involvement will most always be the date of the Initial Meeting. We cannot bill our services until this date. Service Agreements should begin on this date for most efficient utilization of funds.
- It is our goal to get out of each case within 90 days whenever possible and pending the needs of the client. Some cases have been open for years – but most are opened and closed within 90-180 days.
- Our service bills out our time for all observations, meetings, write ups, data reviews, consultation with professionals, behavior plan development, mailing, travel time etc. that are utilized in completing our work on the case.
- The case manager can call ahead and attempt to see about waiting time for us to become involved. However, the waiting time fluctuates due to level of referrals being made to Behavior Wizards on a day to day basis. **The best way to get prompt service is to make the referral**, by completing Steps 1 – 5. We provide our service on a “First Referred First Served Basis.”
- If problems or questions arise about our service – they should be directed to Jon Freer – Program Director – Behavior Wizards at 218-839-9135.
- Please complete our “Customer Satisfaction Survey” upon our closing of a case. By offering us input it allows us to provide you with the best service possible.