**Post FVO Assessment Appointment Process**

**Next day, pull the referral from “FVO Referrals” binder.**

**Check the system to determine if the assessment was completed or if the client missed appointment:**

1. If appointment date shows **assessment completed (green)** **and the** **service log confirms** this, confirm the referral packet is uploaded in ‘Documents’ and place the referral packet in the HIPAA bin. If the referral packet has not been uploaded in ‘Documents’, scan/upload at this time and then place the referral packet in the HIPAA bin.
2. If appointment date shows **assessment completed (green)**, but the **service log does not confirm** this, contact Risk Assessor (RA) for clarification.
3. If RA states assessment was **completed**, confirm the referral packet is uploaded in ‘Documents’ and place the referral packet in the HIPAA bin.
4. If the referral packet has not been uploaded in ‘Documents,’ scan/upload at this time and then place the referral packet in the HIPAA bin.
   1. If the RA states the assessment was **begun, but not completed**, write “incomplete” on the referral and file in the “Missed Assessments” binder. Ask the RA to check the “Incomplete Assessment” checkbox in the system.
5. If appointment date shows **assessment not yet completed (red)** and the **service log confirms** this, write “missed” on the referral and file the referral in “Missed Assessments” binder.
6. If appointment date shows **assessment not yet completed (red)**, but the **service log states assessment completed**, contact RA requesting they upload the assessment in the system to show assessment completed (green). Confirm the referral packet is uploaded in ‘Documents’ and place the referral packet in the HIPAA bin.
7. If the referral packet has not been uploaded in ‘Documents’, scan/upload at this time and then place the referral packet in the HIPAA bin.