



CentralReach Policy (enacted September 29th, 2021)

Colorado Behavior and Learning Group will be transitioning to CentralReach (CR) on 9/29/2021. With CentralReach there will be some changes as to what we require for staff and what staff are given permission to do in CentralReach.

Center Staff

1. Center staff will continue to add their own appointments.
2. Center staff will not be allowed to delete sessions or edit sessions that have already been converted. If a session needs to be deleted or edited after converted, staff will submit a Center Cancellations/Daily Change form. **Changes will only be accepted via form and not by email.**

In-Home Staff

1. **Adding Appointments:** In-home staff are not allowed to add their own sessions to CentralReach. If a session needs to be added, in-home staff will submit an In-Home Cancellations/Daily Changes form
 - A supervisor can also add a session for in-home staff
2. ***NEW* Cancelling Appointments:** In-home staff now have permission to cancel single appointments. However, there are parameters around this:
 - Staff must choose a cancellation reason from the list provided in CentralReach.
 - Staff must follow the existing policy and submit an In-Home Cancellations/Daily Changes form.
 - Staff **DO NOT** need to wait for scheduling to adjust their session for them. Forms are needed for documentation purposes.
 - Forms must be completed by the end of the day that the affected session occurred.
 - **Failure to submit a form, will result in disciplinary action.**
 - In-home staff may only change times for single appointments.
 - Staff will not be allowed to change entire series and need to continue to follow the existing policy around availability changes.
 - ***CHANGING ENTIRE SERIES OF APPOINTMENTS BY DIRECT STAFF WILL RESULT IN DISCIPLINARY ACTION***

All Staff:

1. For concerns that cannot be addressed via forms (e.g., staff are unsure about how to change a session or need confirmation that changes were made correctly) staff will reach out to the

Authorization and Billing Coordinator (Nina Smart) and **BLG Admin** via email at:

nina.smart@coloradobehavior.com

BLGadmin@coloradobehavior.com

2. Staff who reach out and are waiting on a response will not face disciplinary action for unconverted sessions.

Converting Sessions:

1. **All billable sessions must be converted within 24 hours.** After 24 hours have elapsed, staff will not be able to convert sessions themselves and must reach out to the email addresses above for assistance. **Repeated need for assistance due to late conversions will result in disciplinary action.** These conversions are your time sheet and failure to complete them in a timely manner affects both payroll and billing.
2. Sessions will not be considered fully converted without session summaries. CentralReach allows a partial conversion, like Rethink partially verifying sessions missing parent signatures. **However, for billing and payroll purposes, sessions are not kicked over to billing and payroll until conversion has been completed in full.**
3. Staff needing assistance should reach out to nina.smart@coloradobehavior.com and BLGadmin@coloradobehavior.com **the same day as the issue occurs.** Please remember that company policy is to reply to emails within 24 business hours. Please do not send repeated emails/follow up emails about the same topic.