

## Clinical Services Planning Checklist

1. Decide which area of behavioral health will be addressed:
  - Mental Health
  - Substance Abuse
  - Other Addictions like Gambling
  - Co-occurring disorders (like mental health and substance abuse together)
  
2. Decide which population(s) will be served:
  - Small children (ages 5 and below)
  - School age children
  - Late adolescents or transition age children (17 – 24)
  - Adults
  - Older adults (sometimes referred to as Seniors or Elderly)
  - Gender specific service populations
  - Subgroups of the above (for example, Rural Elderly – Hispanic Women – Children from a certain neighborhood – African American men with HIV)

There are multitudes of subgroups that can be identified. It is extremely important to clearly identify the population your organization will serve.
  
3. Decide the type of service or service setting that will be pursued:
  - [Outpatient services](#)
  - [Residential services](#)
  - [Inpatient services](#)
  
4. Decide how the organization will provide crisis intervention services to support emergency needs of the population they serve:
  - Develop crisis intervention services “in-house”
  - Forge an agreement with another organization that has that service available
  
5. Identify the resources you have and those you will need to deliver and evaluate the service. Each of the resources below are:
  - a. Facilities & Equipment
    - i. All organizations offering clinical services will need facilities and equipment to keep notes or other confidential material safe and secure.
    - ii. **Outpatient Services** –
      - Facilities:** Generally you will need private space to meet with clients. This can be in the field (at the person’s home or at a church or meeting place) or it can be in an office setting.
      - Equipment:** Equipment needs can vary for outpatient service delivery. It is somewhat dependent upon the organization’s choice of service delivery site(s). One consideration is how the service is documented. Equipment

needs can range from pens and paper to computer hardware and software to run an integrated notes and billing software program for a computer.

iii. **Residential Services** –

**Facilities:** The primary facility need for this service is a safe place for people to reside. The number of people served will dictate the size and type of facility chosen. It can be a small home or large dormitory setting. In many instances there are licensing requirements that guide the set up of the physical plant for residential services. (See the licensing section for links to Nebraska licensing information.)

**Equipment:** The equipment needs for residential services include all the items that a person requires to live in a setting. Additional equipment considerations include things that help meet the special needs of residents, including items for safety and accessibility.

iv. **Inpatient Services** – The facilities and equipment needs for this level of service are quite extensive. Organizations that decide to offer inpatient services require specialized facilities that conform to licensing standards.

b. **Personnel**

i. Clinical services require a combination of licensed and non-licensed personnel to effectively carry out service delivery.

**Office Personnel:** Larger practices may wish to employ office personnel (who will answer your phone, make appointments, bill for services etc.) This is a function that some clinicians take on themselves in addition to providing treatment services in smaller outpatient or residential treatment settings. This function might also be carried out by qualified volunteers.

**Service delivery personnel:** Understanding the type of services and populations you are serving will guide the type of professional that is required to competently deliver the service.

a. Licensed personnel often have supervisory requirements. For example, Licensed Mental Health Practitioners in Nebraska must have supervision from a Psychologist or Physician when working with clients with certain kinds of problems.

b. Medical professionals may be required to meet some licensing standards along with chemical dependency counselors and mental health professionals. Sometimes specialized certifications are required to deliver services. This should be explored in context of the service chosen and population being served.

- c. Refer to the glossary for definitions of the different types of professionals that can be involved in delivering clinical services.
- d. Consider the type of [training](#) or ongoing education the professionals in your organization will need to competently carry out the services you plan to offer.

c. Licensure

- i. All Organizations planning for delivery of clinical services must be familiar with:

[Health Insurance Portability and Accountability Act of 1996 – HIPAA](#)

[Americans with Disabilities Act – ADA](#)

Local zoning ordinances related to location of facilities (check with your city or county government offices)

Accreditation Standards appropriate for service area

- a. [CARF](#) – Commission on Accreditation of Rehabilitation Facilities
- b. [JCAHO](#) – Joint Commission on Accreditation of Healthcare Organizations
- c. [COA](#) – Council On Accreditation
- d. [NCQA](#) – National Committee for Quality Assurance

- ii. Nebraska licensing for behavioral health services is the responsibility of the [Nebraska Health and Human Service System's Department of Regulation and Licensure](#).

- 1. **Outpatient Services** – These services may be offered without facility licensure in some instances. However, the providers of the service must abide by licensing requirements of their profession. There is a licensure available for [mental health clinics](#) and for [adult day services](#) that can be useful for some outpatient settings. There are licensing requirements for [outpatient substance abuse treatment facilities](#). Explore the options for licensure with a representative of the Nebraska Department of Licensure and Regulation.
- 2. **Residential Services** – The type of residential service you choose dictates the set of [facility licensing requirements](#) you must follow. Providing [respite care](#) within a residential setting also requires a licensed facility.
- 3. **Inpatient Services** – This requires licensure as a [hospital](#) or an [inpatient substance abuse treatment center](#).

d. Financing

- i. Supporting clinical services can be complicated. There is public funding available in Nebraska to support some types of clinical

behavioral health services. Nebraska's public mental health and substance abuse services are organized by geographic region. To qualify as a publicly funded provider, an organization must meet requirements that are available from the [Regional Behavioral Health Authorities](#). These are the quasi-governmental entities that the State of Nebraska uses to distribute and manage public behavioral health funds.

- ii. Planning should also involve exploration of the requirements to bill insurance companies for services rendered. The first step to determine if your organization can bill an insurance company is to contact that company and ask for information about the type of services and professionals they will cover. There are billing software programs available that assist with filling out forms that most insurance companies require. Billing insurance companies for services rendered requires an organization to understand [HIPAA regulations](#), how to use uniform coding systems that insurance companies require, and how to maintain appropriate records to document the service delivered. Many insurance companies require the organization to contact them prior to delivering a service to obtain pre-certification or approval from the insurance company.