

**Cottonwood, Inc.
Policies and Procedures**

SECTION: Consumer Related

POLICY NO: 05-002

SUBJECT: Trial Visit

EFFECTIVE DATE: July 1987

Policy:

All individuals who wish to access Cottonwood, Inc. direct services may be asked to participate in a "trial visit." The exception to this is JobLink Supported Employment Services and SIL Residential Services. The trial visit is conducted to determine the individual's specific support needs.

Procedures:

1. The Director of Support Services and Case Manager are responsible for scheduling trial visits with assistance of the department director(s).
2. The length of trial visit will be determined as part of the admissions process.
3. Prior to a trial visit, the Director of Support Services initiates an entry in the Trial Visit database for the individual(s) expected to participate in the trial visit, which includes a scanned copy of the Applicant Information (if completed within the past two months), obtained from the Case Manager. Automatic notifications regarding the planned trial visit are sent to the Health Supports Nurse Manager and the appropriate coordinator or director, indicating that documentation is available for use by the direct support staff where the trial visit is taking place. If the individual has had Case Management services for more than two months, then the Case Manager shares copies of the following: Support Plan, Behavior Support Plan (if applicable), Medication List, Emergency Medical Treatment Release, ID sheet (if receiving Case Management from Cottonwood, Inc.). During the trial visit, the staff involved informs Service Coordinator and/or Director of the individual's adjustment to the setting.
4. During the trial visit, the staff involved informs Service Coordinator and/or Director of the individual's adjustment to the setting.
5. The Service Director informs the Director of Support Services of the individual's support needs, adjustment to the setting, and any concerns or issues at the end of the Trial Visit.
6. The Director of Support Services summarizes the results of the Trial Visit for admission consideration.
7. Trial visits will not be allowed to begin until all related documentation is obtained.