# Social Services Training Guide

**Contact Info**

- Email: socialservices@spectrahealth.org
- Phone Extension: 701-757-2100 x1218

## General Appointment Information:

- **SpectraPlan ONLY**: 30 minutes
- **Marketplace**: 90 minutes
- **All other SS needs**: 60 minutes (*unless approved by Social Services staff*)

**Appointment Notes**

- Include chief complaint (e.g., transportation, RX assistance, insurance, SP)
- Note if patient refused to provide information
- Indicate who approved the visit (medical, dental, SS, Optometry, etc.)
- If not in-person, specify method (Teams, phone, Zoom)
- *Must be approved/requested by SS staff only*

## Staff overview

| Name | Role / Focus | Trained In | Not Trained In / Notes |
|---|---|---|---|
| **Kayla Hochstetler** | Supervises SS staff. Not taking new patients unless approved by Kayla or Charge SW. | FTR, Community Connect, ACP, Marketplace | Housing Prioritization Tool (HPT) |
| **Taylor Becker** | Supervises Social Work Interns. Focus on SpectraPlan & insurance enrollment. In Larimore every Wednesday. | Marketplace, FTR, Community Connect, ACP | HPT |
| **Haleigh Stenseth** | SUD Triage Caseworker. Focus on patients in recovery. Triages MAT intake calls. **Any SS staff can do MAT intake if needed.** | Marketplace, FTR | Community Connect, HPT |
| **Tanya Cook** | Can see anyone. | FTR, Community Connect | |
| **Elizabeth Stevens** | Can see anyone. | FTR, Community Connect | Marketplace, HPT |
| **SW Interns** | Can see anyone once trained. Focus on SpectraPlan, transportation, insurance enrollment. | — | Marketplace |

## Social Service Processes, Staff Availability, and Scheduling

** SS staff schedules are not public, except for:**

- SpectraPlan
- Insurance navigation
- 1–2 same-day spots (available daily)

**Same-Day Appointments**

- PSRs may schedule for any reason
- Do not schedule until the day of the appointment
- Staff availability varies; holds are placed for flexibility
- Call at **7:30 AM, Monday–Friday** — First Come, First Served

**Scheduling Guidelines**

- Patients needing insurance navigation or SpectraPlan: schedule as normal
- If patient is new or hasn't visited in over a year:
    - Must be triaged by Charge SS member before scheduling
- If patient presents and no same-day spot is available:
- Ask reason for visit and get MRN
- Say:

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 "Please give me a few minutes as I reach out to our Social Services team and inquire if anyone is available to come out and see you. Please have a seat until I have an answer."
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- Keeps front desk clear for other patients
- Relay SS staff guidance to patient

# Additional information

**Housing Prioritization Tool (HPT)**

- Formerly called VISPDAT
- Vulnerability assessment for housing
- Only Callie can complete due to system access from a previous grant
- Refer patients asking for HPT to Charge SS staff for triage
- Patients may also be referred to the Mission

**Free Through Recovery (FTR)**

- Collaborative program with ND DHS Behavioral Health Division & DOCR
- For justice-involved individuals with behavioral health concerns
- Spectra Health provides Care Coordination
- **Referrals must come from probation/parole**

**Community Connect**

- Collaborative program with ND BHS Behavioral Health Division
- Spectra Health provides Care Coordination
- Patients must:
    - Complete application
    - Select Spectra Health as provider

- Be approved to access services

# SW/BH/Optom Checklists



### Start of day

| Task | Notes |
|---|---|
| Turn lights on | |
| Log into comuter/phone | Turn scanner on |
| Log into Epic and Teams | |
| Tend to Teams/Provider requests | For example: When a provider is out, rescheduling |
| Collect chart prep from optom area | |
| Check voicemails, return patient calls | |
| Work on patient MyChart messages for your department | |
| Start chart prep | |
| Confirmation calls | Typically done before noon |

Reminder - check voicemails throughout the day and return patient calls as time allows.

### Weekly

Please remember to check the waitlist for your department.

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