



# Promising Practice

## Cross-train Counselors and Assign Backups for Assessments

### Problem

There are not enough counselors available to do assessments and counselors get burned out from doing too many assessments.

### Solution

Cross-train counselors to both assess and treat clients and assign backup counselors to see clients whenever the number of requests for assessments exceeds scheduled staffing levels.

### Featured Stories

**Kentucky River Community Care** in Jackson, Kentucky reduced the waiting time for assessments from 21 days to 1 day by training 8 additional counselors to conduct substance abuse assessments. They also increased the number of offices available for assessments from 1 to 3 to make it possible to conduct multiple assessments simultaneously. Although the appointment scheduler noted that most clients declined the next-day appointment, they gave clients the choice about which day and time was most convenient for them by scheduling the next available counselor for the initial appointment.

**STEP 2** in Reno, Nevada reduced the waiting time for treatment from 21 days to 10 days by establishing an assessment team that included all of their counselors. Each counselor is assigned a day when they are responsible for assessments. Initially, this change led to an increase in waiting times from 5 days to 24 days; after the initial training period and some counselor re-assignments, the waiting time was reduced to 10 days.

### Lessons Learned

- Use backup counselors to respond to unanticipated numbers of clients, especially walk-in clients, to compensate for staffing shortfalls, and to be able to schedule more flexibly.
- Backup counselors may include qualified managers, other trained counselors, or on-call counselors.

### Tracking Measures

#### Cycle Measure

Number of days until the next available appointment

#### Data Collection Form

[Next Available Appointment Tracking Spreadsheet](#)

### Action Steps

- Plan**
1. Collect baseline data to track the number of days until the next available appointment.

#### NIATx Aims

- ✓ Reduce waiting time
  - Reduce no-shows
  - Increase continuation
  - Increase admissions

#### Financial Impact

- ✓ Increase revenue
- ✓ Increase staff retention
- Reduce costs



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2. Select two or three counselors to cross-train so that they can perform assessments.
  3. If necessary, create a training program for counselors to learn how to conduct assessments.
- Do**
4. Train two or three counselors to conduct assessments and schedule them for assessments for two weeks.
  5. Re-check the number of days until the next available assessment appointment.
- Study**
6. Check the fidelity of the change. Was the change implemented as planned?
  7. Evaluate the change:
    - Did the number of counselors trained to perform assessments increase?
    - Did the newly trained counselors able to perform assessments?
    - Did the number of days until the next available assessment appointment decrease?
- Act**
8. Adjust the training program or the number of counselors and re-test this promising practice for an additional two weeks.

Repeat this series of steps until you have cross-trained all available counselors so that they can both assess and treat clients.

### Related Promising Practices

- [Establish Walk-in Hours](#)
- [Use All Time Slots Including Special Use Time Slots](#)
- [Double-book Time Slots](#)

### More Stories

**Connecticut Renaissance, Inc.** in Bridgeport, Connecticut reduced the waiting time for assessments from 14 days to same-day service and increased the number of assessments by 51 percent by asking counselors to work as a team and help with intakes if their schedules permitted when multiple clients showed up for assessments at the same time. They also significantly reduced the caseload for one counselor who took responsibility for being the intake coordinator.

**Asian Counseling and Referral Service** in Seattle, Washington reduced the waiting time for assessments from 14 days to 7 days by increasing the number of counselors available to do assessments and by reallocating staff assignments to back-up the assessment staff if a client had to wait more than 5 days for an assessment appointment. Because this change added extra work for most of the staff, they recognized and celebrated the staff for improving customer service. They were aware of the limits on staff capacity.



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**Prairie Ridge Addiction Treatment Services** in Mason City, Iowa reduced the waiting time for assessments from 9 days to 1 day by identifying sites with excess capacity during high-demand periods at other sites and by bringing in a counselor from an underutilized satellite office to provide assessments during these times.

**Sinnissippi Centers** in Dixon, Illinois created a backup plan for double-booking assessment appointments. When all clients showed up for double-booked time slots, supervisors provided backup so that all the clients received service without overloading the regularly scheduled counselors.

**The Center for Drug Free Living** in Orlando, Florida cross-trained all counselors to complete assessments. This increased the number of assessment time slots available for simultaneous walk-in appointments, eliminated cancellations due to staff absences, and improved staff satisfaction.