Weeks 1-2: Basics of the Course, Ethics Review, Initial Components of an Intake Report

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Overall Targets for Weeks 1-2

- Using the e-learning material in IS.
  - Course requirements.
  - Grading.
- A review of ABA ethical practices for clinicians.
- Creating initial components of an intake report (collecting client identifying information, reasons for referral, indirect assessment processes using Hanley's open-ended functional assessment interview form and Functional Analysis Screening Tool (FAST), collecting client background information, and basic preference assessments).

Let's head to IS and the syllabus!

This course is... All about applied practice!

- *Learning to use certain tools.*
- *Practicing with them on a current case and/or via a role play.*
- **Repeated** *practice.. not mastery but working to get there.*

Specific Goals for this Online Meeting

1. Identify the initial steps in the intake process.
2. Using interview and indirect assessment forms.
3. Practice creating the first part of an intake report.
4. Use the work you have created here to replicate the first part of the process/report with your case.

INTAKE: WHAT IS IT?

The intake process generally means…

- Steps you are taking to open up a new case.
- Collecting initial baseline data (qualitative and quantitative).
- Determining the need for services.
- Determining what type of services are needed (e.g., intensity).
- Making the case for services being funded.

Sets the foundation for data collection and analysis!

INTAKE: WHY IT IS IMPORTANT

The BACB Professional and Ethical Compliance Code:

- 2.10: Work must be documented to allow for later services and accountability.
- 2.11: Data should allow for a case transition at any moment of time.
- 3.01: FBA must be done before developing a BIP; with data being collected and displayed to allow for moment-to-moment decision making.
- 4.05: Behavior change objectives need to be in writing and have thorough procedural descriptions.

Overall... THINK TECHNOLOGICAL

- If the behavior plan, goals, objectives, program sheets, are not specific, how can someone pick up the program and start running it?
- If you are not collecting data on all trials/behavior where is the accountability for session time?

https://www.bacb.com/wp-content/uploads/170706r_compliance_code_english.pdf

Creating a Procedure to Include:

- Contacting parents
- Sending parents needed forms/information
- Scheduling intake interview
- Reviewing contract and expectations
- Completing assessment procedures
- Doing observations/collecting direct data
- Doing skills assessment
- Analyzing all the data
- Writing the report
- Using the report for development of the BIP and programming

"To…" List

To Do	To Call	To Get
☐ Mail out indirect assessments	☐ Family for pre-screening and safety	☐ Copies of parent training materials
☐ Prepare parent training materials	☐ Family to remind of training requirement	☐ Copies made of other docs for family
☐ Mail out parent training materials	☐ Family to remind of the meeting	☐ Sample program binder and videos
☐ Prepare other assessment docs	☐	☐
☐ Send out agenda	☐	☐

YOU WILL NEED:

- ✓ **Intake report template (first part).**
- ✓ **Intake process part 1 instructions.**
- ✓ Hanley opened ended functional assessment interview form.
- ✓ FAST form.
- ✓ Preference assessment form from the internet.
- ✓ *Additional pieces will be added to doc sharing in Zoom during the call.*

Basic Parent Interview

Instructions | **Model** | **Practice**

Intake Process Part 1 Instructions

Directions for use: Go through each section and check off each item as completed.

Identifying Information (12 components)

- Ask the caregiver the following information (write down responses on the report template):
  - ☐ Client's name
  - ☐ Client's birthdate
  - ☐ Age
  - ☐ Gender
  - ☐ Caregivers' names
  - ☐ Phone
  - ☐ Email
  - ☐ Address
  - ☐ Funding source for services
  - ☐ Client's current diagnosis
- Additionally write down:
  - ☐ Date of assessment
  - ☐ Assessor's name

- I will model completing the first few steps.

- Pair up in the breakout rooms.
- Take the report template.
- Take the instructions.
- Complete half of the instructions then switch roles with your partner.
- I will pop into the rooms to support and provide feedback.

You will need:

- ✓ ***Intake report template (first part).***
- ✓ ***Intake process part 1 instructions.***
- ✓ **Hanley opened ended functional assessment interview form.**
- ✓ FAST form.
- ✓ Preference assessment form from the internet.

Function-Based Parent Interview Tools: Hanley

Instructions

Intake Assessment Process (Description of Assessment Process)

- ➢ Transition to the use of the indirect functional assessment tools.
- ➢ Begin with using Hanley's Open-Ended Functional Assessment Interview (write down responses on the assessment interview form):
    - ☐ Complete the top of the form and the relevant background information section, using the information collected earlier with the family.
    - ☐ Ask the parents questions 5-20 on the form (only ask the question/present the statement written directly next to the number, do not read the part next to the arrows out loud).

Model

- I will model completing the first few steps.

Practice

- Pair up.
- Take the report template.
- Take the instructions.
- Take the Hanley form.
- Complete half of the form then switch roles with your partner.
- I will be around to support and provide feedback.

YOU WILL NEED:

- ✓ ***Intake report template (first part).***
- ✓ ***Intake process part 1 instructions.***
- ✓ Hanley opened ended functional assessment interview form.
- ✓ **FAST form.**
- ✓ Preference assessment form from the internet.

Function-Based Parent Interview Tools: FAST

Instructions

- Next, use the Functional Analysis Screening Tool, FAST (write down responses on the FAST form):
  - Complete the top of the form using the information collected earlier with the family.
  - Read the directions on the form.
  - Ask the parent questions 1-4 in the Informant-Client Relationship section.
  - Ask the parent questions 1-8 in the Problem Behavior Information section. Only allow ONE behavior to be selected for discussion with the form in question 1. The form is completed for ONLY ONE problem behavior. If more than one behavior is specified, then additional forms will need to be completed for each behavior.
  - Ask the parent questions 1-16 in the large box. All questions should be answered in regard to ONLY ONE problem behavior. Circle only one answer per question.
  - Complete the scoring summary box by counting which items were scored as "yes" in the previous section.
- Go back to the report template.

Model

- I will model completing the first few steps .

Practice

- Pair up.
- Take the report template .
- Take the instructions .
- FAST form.
- Complete half of the form then switch roles with your partner.
- I will be around to support and provide feedback.

YOU WILL NEED:

- ✓ ***Intake report template (first part).***
- ✓ ***Intake process part 1 instructions.***
- ✓ Hanley opened ended functional assessment interview form.
- ✓ FAST form.
- ✓ **Preference assessment form from the internet.**

Preference Assessment

Instructions

Preferences (3 components)

- Collect indirect information from the parents about items that might function as reinforcers (are considered preferences).
    - Ask parents to list a few of the child's favorite items and write them down on the report template.
    - Give the parents the preference/possible reinforcer checklist document. Explain to them how to complete the document and to return it to you next time (information later added to the intake report).

Model

- I will model completing the first few steps.

Practice

- Pair up.
- Take the report template.
- Take the instructions.
- Find a preference assessment form.
- Complete half of the form then switch roles with your partner.
- I will be around to support and provide feedback.

Using the Collected Data

- Make sure that all areas of your first portion of the intake report are now completed, add in any missing information.
- This will serve as the model for what you should be completing in your assessment at the end of week 2.

Moving Forward

Ideally, you should be practicing these skills for the remainder of this week and next. Please try to complete the needed pieces with a real client, if possible.

You will need:

- ✓ Intake report template (first part).
- ✓ Intake process part 1 instructions .
- ✓ Hanley opened ended functional assessment interview form.
- ✓ FAST form.
- ✓ Preference assessment form.

Questions?

About the tools we've used, expectations, later classes?

Final recap: Before our next In-Person Class

- ✗ Use the examples/tools with your current case to do:
  - ✗ Parent interview
  - ✗ *Hanley FA*
  - ✗ *FAST*
  - ✗ Preference assessment
- ✗ If you do not have a current case, please complete all of the forms with another person who can pretend to be a parent of a child with challenging behaviors.

**** Reminder, you can of course do observations/interviews/data collection remotely! Zoom can be used, but there are other options.*

Final recap: Before our next In-Person Class

- ✗ Use the collected data to write the beginning of the intake report (only section 1- what we worked on today).
- ✗ View all of the week 1 and week 2 materials (there are some additional indirect assessment tools there, you are welcome to explore them).
- ✗ Watch this recording, if needed.
- ✗ Complete the assessments within the IS system (do not worry about sections we have not gotten to yet…).
- ✗ Be prepared with part 1 of the intake report and your collected data for the next live class.