

## Program Ticket FAQ/How To:

**Thank you for taking the time to review this! Reception greatly appreciates your efforts to work with us & improve collaboration 😊**

When do I submit a PT?:

Any time a change occurs in a client's status or group. For example:

- Starting a program or group
- Changing a program or group
- Changing caseload therapist
- Updating discharge date
- Adding additional PACs to a group

Types of PTs:

1. Intake: Initial placement into PDBTI programming/group
  - a. This lets the front desk team know to send a client materials and charge/waive the membership fee
  - b. Indicates who the IT/caseload therapist is so messages are directed to the correct person
  - c. Puts a client on the WL for group
2. Transfer: Changing programs (e.g. EST --> FP), changing groups within a program, changes to caseload therapist
3. Discharge Date Update\*: The discharge date has been changed

\*For EST clients, the group leader can change the discharge date.

Formerly we used "Group Info Update" tickets to indicate a change to a client's start date, end date, or weeks in a program. Going forward please indicate this via group roster update.

Where can I find the PT form?: [SharePoint!](#)

What's the difference between a PT and a roster update?:

PT:

- Adds a client to programs and waitlists (WL) for specific groups
- Filled out by intake or caseload therapist (for EST clients, this is the group leader)

Roster Updates:

- Moves a client from “WL” to “in group” status within a specific roster.
- Can remove a client from a group
- Comes from group leader ONLY

What do I do if I notice group info needs to be updated on the PT ticket dropdown?:

Reach out to Zoe Green via email ([zgreen@pdbti.org](mailto:zgreen@pdbti.org)) or zoom message.

Please make sure to include:

See next page for a sample PT 😊

- Client name --> preferred name is a-okay just make sure you put their legal name in parenthesis just in case
- What program and group the client is joining
  - o If the client is a teen (optional for YA), please also include what group the PAC(s) will be joining
- Caseload therapist --> so we can make sure admin is contacting the correct provider
- Start date, expected duration, and discharge date --> estimates are okay as these dates can be changed if need be via monthly group roster updates

