Housekeeping Checklist

Don’t assume anything!
Be prepared to address the following issues:

**Screening, recruitment and referral procedures**
Advertisement in the community
Medical community contracts: pulmonary, oncology, cardiology, primary care, OB/Gyn
Community/Institutional resources for mental health, substance abuse

**Data Collection**
Screening tools: CES-D, telephone screening

**Policies and procedures**
Financial agreements: fee schedule, missed appointments, refund policy
Visit frequency, number of visits covered by fee
Use of telephone contact
Is an individual session included in the fee schedule
Right to privacy: HIPPA, institutional policy, contact outside of group
Participant responsibilities: visit attendance, notification for missed meetings, respect for other participants
Paperwork for medical providers: release of information, permission for nicotine use, securing prescriptions for pharmacotherapy
Packets and handouts: separate fee, use of web resources
Contact information: yours, expectation for call back, current contact information for participant
Cancellation policy: weather, illness, refund/reschedule