

STANDARD OPERATING PROCEDURE

Lead Handoff, Placement, Intake, Transfer, Discharge, and Monitoring Process

OBJECTIVE

To establish a structured, efficient, and transparent process for handling leads from pre-qualification to [intake](#), transfers, discharges, and monitoring. This SOP ensures that all data is accurately documented, updates are communicated in real-time, and cross-checking is performed daily for operational efficiency.

RESPONSIBILITY AND ACCOUNTABILITY

Action	Responsible
<ul style="list-style-type: none">• Evaluate pre-qualified leads and determine their placement in an Intensive Outpatient Program (IOP) or Sober Living Home (SLH) under DFR or Bridges.• Notify all stakeholders in the WhatsApp “DFR - Main Chat” when a lead has landed, including:<ul style="list-style-type: none">• Client’s legal name• IOP placement (if applicable)• DFR/Bridges branch assigned• Ensure Operations Team (House Managers) is informed for intake processing.	Sales Closers
<p>Intake Responsibilities: Initiate onsite intake and ensure the client completes the appropriate intake form:</p> <ul style="list-style-type: none">• DFR - New Member Intake Form• Bridges - New Intake Form <p>Confirm intake completion by posting in:</p> <ul style="list-style-type: none">• DFR: “Design Shift Notes” (Signal Group Chat)• Bridges: “Bridges Shift Notes”	Operations Team (House Managers)

<p>(Signal Group Chat)</p> <ul style="list-style-type: none"> • Update the intake board at the house. <p>Transfer Responsibilities:</p> <ul style="list-style-type: none"> • If a resident needs to be transferred to a different DFR or Bridges branch or IOP, the Operations Team must: • Fill out the “SLH/IOP Transfer Form” to document the transfer. • Post in the appropriate Signal Group Chat once the transfer is completed. • Update the relevant Google Sheets to reflect the new placement. <p>Discharge Responsibilities:</p> <ul style="list-style-type: none"> • Fill out the “DFR - Discharge Form” when a resident is fully discharged. • Confirm discharge completion by posting in: <ul style="list-style-type: none"> • DFR: “Design Shift Notes” • Bridges: “Bridges Shift Notes” • Update the discharge board at the house. 	
<ul style="list-style-type: none"> • Log intake, transfer, and discharge details into Google Sheets, ensuring: <ul style="list-style-type: none"> • Resident’s legal name • Intake/transfer/discharge date • Cash paid (if applicable) • Data must be recorded in: <ul style="list-style-type: none"> • “Design Client Info” (DFR residents) • “Bridges Client Info” (Bridges residents) • Ensure accuracy for billing and compliance purposes. 	<p>DFR Leadership Team</p>
<p>Intake Monitoring Responsibilities:</p> <ul style="list-style-type: none"> • Monitor all intake notifications in “#dfr-closed-won-deals” (Slack) • Conduct daily cross-checking across: <ul style="list-style-type: none"> • WhatsApp notifications from Sales Closers. • Completed intake forms. • Signal Group confirmations from 	<p>HubSpot Specialist</p>

<p>House Managers.</p> <ul style="list-style-type: none"> •Google Sheet entries from the Leadership Team. •Flag and escalate any discrepancies. <p>Transfer Monitoring Responsibilities:</p> <ul style="list-style-type: none"> • Monitor all transfer notifications from the Signal Group Chat and verify that: <ul style="list-style-type: none"> •The SLH/IOP Transfer Form is completed. •The Google Sheets are updated to reflect the new placement. •Billing is not affected, as transfers do not stop charges. <p>Discharge Monitoring Responsibilities:</p> <ul style="list-style-type: none"> • Monitor all discharge notifications in "#dfr-discharges" (Slack). • Locate the contact in HubSpot and: • Post the Slack notification as a note. <ul style="list-style-type: none"> •Update Lifecycle Stage to "Alumni". •Update SLH - Lead Status to "Alumni". •Update SLH - Readmission Status to: <ul style="list-style-type: none"> •Eligible •Not Eligible at this Time •Banned 	
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PROCESS FLOW

1. Lead Handoff & Intake Process

✓ Sales Closer Actions:

- Notify stakeholders on WhatsApp "DFR - Main Chat".
- Provide key details about IOP/SLH placement.

✓ Operations Team Actions (House Managers):

- Conduct intake, complete forms, and trigger Slack notification.
- Confirm intake in Signal Group Chat.

- Update the intake board at the house.

✔ **DFR Leadership Team Actions:**

- Log intake details in Google Sheets.

✔ **HubSpot Specialist Actions:**

- Monitor intake notifications and cross-check data daily.

2. Transfer Process

✔ **Operations Team Actions (House Managers):**

- Complete the “SLH/IOP Transfer Form”.
- Post in the Signal Group Chat once the transfer is done.
- Update the Google Sheets to reflect the new placement.

✔ **HubSpot Specialist Actions:**

- Verify the transfer form completion and Google Sheets update.
- Ensure billing continues, as transfers do not stop charges.

3. Discharge Process

✔ **Operations Team Actions (House Managers):**

- Complete the “DFR - Discharge Form”.
- Confirm discharge in Signal Group Chat.
- Update the board at the house.
- Ensure billing stops, as discharges fully remove residents from the system.

✔ **DFR Leadership Team Actions:**

- Log discharge details in Google Sheets.

✔ **HubSpot Specialist Actions:**

- Monitor discharge notifications and update:
 - HubSpot contact records.

- Lifecycle Stage → “Alumni”.
- SLH - Lead Status → “Alumni”.
- SLH - Readmission Status: Eligible / Not Eligible at this Time / Banned.

Compliance & Accountability

- **Sales Closers:** Ensure accurate lead handoff and real-time communication.
- **Operations Team (House Managers):** Execute intakes, transfers, and discharges, updating relevant systems.
- **DFR Leadership Team:** Maintain accurate data logs for billing and compliance.
- **HubSpot Specialist:** Monitor all intakes, transfers, and discharges, ensuring data integrity and automation readiness.

Key Requirements

- ✓ Legal names must be used in all documents.
- ✓ Intake, transfer, and discharge dates must be accurate for tracking and billing.
- ✓ Billing updates must be communicated to Matt for Google Sheets adjustments.
- ✓ Daily monitoring of Slack and Signal group chats by the HubSpot Specialist.
- ✓ Transfers do not stop billing; discharges completely stop billing.

Conclusion

This comprehensive SOP ensures a structured, transparent, and efficient process for lead conversion, intake, transfers, discharges, and monitoring. By defining clear roles and responsibilities, it ensures seamless collaboration and operational accuracy across all departments.

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