

MENTAL HEALTH SERVICES

COMBINED UNIFORM
CLINICAL RECORDS
MANUAL

APRIL 2015

Section 7	Correspondence <i>Completed on paper and stored in the paper chart</i> Correspondence Received Documentation of correspondence requested	
Section 8	Previous Treatment <i>Completed on paper and stored in the paper chart</i>	
Section 9	Appendix <i>Completed on paper and stored in the paper chart</i> Materials for County Operated Clinics Authorization to use or disclose Protected Health Information	HHSA: 23-07 (04/03)
Section 11	Case Management <i>Completed on paper and stored in the paper chart</i> File Chart Order Agreement for Services Client Financial Information Transfer/Case Manager Discharge Checklist	HHSA:MHS-864 (06/2003) HHSA:MHS-862 (06/2003) HHSA:MHS-863 (06/2003)

**When Anasazi is down, or there are new staff, completion of Anasazi required assessments and forms will be on paper and stored in the appropriate section of the chart. These paper forms can be found on Optum Website.

UNIFORM CHART ORDER
CHILDRENS MENTAL HEALTH SERVICES

Section 1	<p><u>CLIENT DATA –</u> <i>Completed electronically and stored in Anasazi</i> Client Information Face Sheet Discharge Summary</p>	
Section 2	<p><u>ASSESSMENTS</u> <i>Completed electronically and stored in Anasazi</i> Behavioral Health Assessment Initial Screening Form Safety Alerts High Risk Index <i>Completed on paper and stored in the paper chart</i> Youth Transition Self Evaluation (Optional) Transitional Youth Referral Plan (Optional) Psychological Testing and Evaluations Pathways to Well-Being Eligibility Determination Review</p>	<p>HHSA:MHS-624 HHSA:MHS-605</p>
Section 3	<p><u>OUTCOME EVALUATIONS -</u> <i>Completed on paper and stored in the paper chart</i> ECBI CAMS</p>	
Section 4	<p><u>PLANS -</u> <i>Completed electronically and stored in Anasazi</i> Client Plan Therapeutic Behavioral Services Client Plan <i>Completed on paper and stored in the paper chart</i> My Safety Plan Authorization (day programs and ancillary services) Utilization Management Request and Authorization Pathways Teaming Standards Form Pathways Progress Summary Action Plan Pathways Progress Report to Child Welfare Services</p>	<p>UBH 12-13-02 (revised 8-1-07)</p>
Section 5	<p><u>PROGRESS NOTES –</u> <i>Completed electronically and stored in Anasazi</i> Individual / Family Progress Note Group Progress Note TBS Progress Note <i>Completed on paper and stored in the paper chart</i> Day Program – Weekly Summary (with or without prompts) Day Program – Progress Note Service Records may be filed in this section or kept in a separate confidential location – minimum 7 years</p>	<p>HHSA:MHS-613 A or B HHSA:MHS-604</p>
Section 6	<p><u>MEDICAL-</u> <i>Completed electronically and stored in Anasazi</i> Psychiatric Assessment Medical Conditions Vital Signs All Medication Information <i>Completed on paper and stored in the paper chart</i> Informed Consent for the Use of Psychotropic Medications (or Ex Parte) Application & Order for Authorization to Administer Psychotropic Medication – Juvenile Laboratory Reports Physician’s Order Form *Child/Youth History Questionnaire Advance Directive Advisement (Adult clients and emancipated minors) Advance Directive (when provided) Coordination with Primary Care Physician and Behavioral health Services Form</p>	<p>HHSA:MHS-005 HHSA:MHS-985 HHSA:MHS-651 HHSA:MHS-611 JV220 (1-1-07)</p>
Section 7	<p><u>ADMINISTRATIVE/LEGAL (for county programs) –</u> <i>Completed on paper and stored in the paper chart</i> Consent for Mental Health Services Dependents: Consent for Treatment – Parent Ex-parte or Court Order Authorization to Use or Disclose Protected Health Information Dependents: Authorization to Use or Disclose Protected Health Info. Ex-parte or Court Order Authorization for Use or Disclosure of Health Information to School Districts</p>	<p>HHSA:MHS-272 04-24P (06/03) 04-24C (04/04) HHSA:23-07(04/03) 14 font 04-24A-P (03/04) 04-24A-C (04/04)</p>

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Discharge Summary – Instructions

Section 2 – Assessments

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Initial Screening Form Fill

Initial Screening Paper Form

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Initial Screening – ESU Form Fill

Initial Screening – ESU Paper Form

Initial Screening – ESU Form Instructions

Explanation – Safety Alerts

Safety Alerts – Form Instructions

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- f. Tiers – Financial
- g. Tiers – Identity Issues
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My Safety Plan (Spanish)

My Safety Plan Form Fill (Spanish)

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DPR Form

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Progress Report to Child Welfare Services Form

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ICC Progress Note