## CLINICAL RECORD FORMS

ADULT MENTAL HEALTH SERVICES

### Section 1 *CLIENT DATA -*

***Completed electronically and stored in CCBH***

Client Information Face Sheet

Discharge Summary

Demographic Form

***Completed on paper and stored in the paper chart***

Client Assignment Form

### Section 2 ASSESSMENT -

***Completed electronically and stored in CCBH***

Initial Screening

Behavioral Health Assessment

Problem List

Safety Alerts

High Risk Assessment

Diagnosis Form

***Completed on paper and stored in the paper chart***

Recovery Markers Questionnaire (RMQ)

Illness Management and Recover (IMR)

Milestones of Recovery Scare (MORS)

Level of Care Utilization System (LOCUS)

Substance Abuse Treatment Scale (SATS-R) – (Optional)

### Section 3 PLANS -

***Completed electronically and stored in CCBH***

Client Plan

Case Management/Peer Support Plan Note

***Completed on paper and stored in the paper chart***

My Safety Plan

### Section 4 PROGRESS NOTES -

***Completed electronically and stored in CCBH***

Individual Progress Note (which includes all Medication notes)

Group Progress Note

### Section 5 MEDICAL -

***Completed electronically and stored in CCBH***

Psychiatric Assessment

Vital Signs/Weight/Height Record (optional)

Medications

Medical Conditions

Abnormal Involuntary Movement Scale (Optional)

***Completed on paper and stored in the paper chart***

Informed Consent for the Use of Psychotropic Medications

Lab Results

Physician’s Order Form

Coordination with Primary Care Physician and Behavioral Health Services

### Section 6 ADMINISTRATIVE/LEGAL -

***Completed on paper and stored in the paper chart***

Agreement for Services

Client Questionnaire

Voter Registration

All other consents/authorizations

Advance Directive

Notice of Privacy Practices Acknowledgement

### Section 7 CORRESPONDENCE -

***Completed on paper and stored in the paper chart***

Correspondence Received

Documentation of correspondence requested

### Section 8 PREVIOUS TREATMENT -

***Completed on paper and stored in the paper chart***

### Section 9 APPENDIX -

***Completed on paper and stored in the paper chart***

Materials for County Operated Clinics

Authorization to use or disclose Protected Health Information

### Section 11 CASE MANAGEMENT -

***Completed on paper and stored in the paper chart***

File Chart Order

Agreement for Services

Client Financial Information

Transfer/Case Manager Discharge Checklist

\*\*When CCBH is down, or there are new staff, completion of CCBH 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 in the UCRM Tab.