

DOCUMENTATION REQUIREMENTS MATRIX

- 1) Initial Assessment and Client/Treatment Plan due within 60 days of Start of Service

Child Initial Packet includes:

- a) Core Assessment
- b) Child Mental Status Exam
- c) Child Health Questionnaire
- d) Client/Treatment Plan
- e) CANS - Child/Adolescent Needs Assessment (for some programs)
- f) Diagnosis
- g) CSI Admission

Adult Initial Packet includes:

- a) Core Assessment
- b) Adult Mental Status Exam
- c) Adult Health Questionnaire
- d) Client/Treatment Plan
- e) Co-Occurring Disorders Assessment – CODA as needed/applicable
- f) Vocational Assessment as needed/applicable
- g) Diagnosis
- h) CSI Admission

- 2) MD Initial Psychiatric Assessment completed at start of psychiatric Service;
Medication Service Plan completed upon prescribing of medications and annually thereafter
- 3) N/A*: by program design and scope of practice some staff in specific programs may complete these documents
- 4) For Adult programs, LOCUS completed to go to higher level of care and annually with Reauthorization requests
- 5) CANS completed at open, discharge, and 6-month intervals for designated programs (currently WRAP and FIT level programs).
- 6) All mandatory State Reporting information (CSI, OSHPD, MHSA FSP documents, etc) must be collected and entered at the required collection points.
- 7) Allergies and Hypersensitivities – This is entered in Order Connect (formerly Infoscriber).
All staff expected to complete Health Questionnaires are expected to complete this information.
If a client has no known allergies, this must be indicated as well as No Known Allergies (NKA).
- 8) X*: indicates co-signature/supervisor approval required

Note: * A Progress Note that accounts for service and duration must be completed with every service
(i.e. completing the Core Assessment does not generate a charge)

Revised 9/21/2012