

**CHART DOCUMENTATION CHECKLIST—INITIAL 60 DAYS**

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✓	Date Compl	Process – Timeline (standard)	Item	Dis-allow?	Comment -- Indicate if F/U needed	F/U done
<b>ASSESSMENT</b>						
		B4 Services Provided	Brief Screening Tool = Mod – Severe	Yes		
		Assess < 30 days	Inf Materials w sig	No		
		Assess < 30 days	Included Dx w Signs/Sx's Criteria Documented	Yes		
		<b>Assess-Same as above</b>	<b>For C/M indicated needed areas to be addressed: homelessness, medical needs, vocational, educational, etc.</b>	<b>Yes</b>		
		Assess < 30 days	Dx determined by LPHA (Licensed or Waivered/Registered with Licensed co-sig)	Yes		
		Assess < 30 days	Doc: 1) Signif. Impairments or, 2) risk of, or 3) EPSDT developmental risk.	Yes		
		Assess < 30 days	Tx will: 1) Decrease Signif Impairments; 2) prevent risk of deterioration; OR 3) allow child to develop appropriately	Yes		
		<b>Assess &lt; 30 days</b>	<b>For C/M Doc that Ct's Sx prevent Ct from accessing needed comm support services or for child lack of ... (housing, medical, etc.) exacerbates Ct's Sx's.</b>	<b>Yes</b>		
		Assess < 30 days	Tx will: Decrease Signif Impairments; prevent risk of deterioration; OR allow child to develop appropriately	Yes		
		Assess < 30 days	Cultural (includes SOGI)/Lang/Phys Limit Collected & Addressed	No		
		Assess < 30 days	Finalized w/in 30 days w/ LPHA signature or Trainee with a Licensed LPHA co-sig	Yes		
		Assess < 30 days	No Planned Svcs b4 Assess	Yes		
		As soon as needed	Informed Releases Signed	No		
		As soon as needed	Med Consents Signed—New Forms	No		
<b>PLAN</b>						
		Plan < 60 days	CANS/ANSA b4 Plan	Yes		
		Plan < 60 days	Risk past 90 days = Safety Plan	No		
		Plan < 60 days	All Service Modalities Listed with Frequency & Duration	Yes		
		Plan < 60 days	Each Svc Modal has Detailed Interventions	No		
		<b>Plan &lt; 60 days</b>	<b>For C/M Detailed Intervention indicates: Linkage and Monitoring of Ct's successful engagement in community support svcs for ... (housing, ed, voc, medical, etc.) will decrease Ct'sl MH Sx's of ...</b>	<b>Yes</b>		
		Plan < 60 days	All Objectives are MH in nature, SMART w/ duration	Yes		
		Plan < 60 days	Finalized w Staff Sig < 60 days	Yes		
		Plan < 60 days	Finalized w MD Sig < 60 days	Pend		
		Plan < 60 days	Ct offered copy, participated in, & agreed-doc in PN or narrative	No		
		Plan < 60 days	Finalized w Ct Sign < 60 days or Documentation	Yes		
		Plan < 60 days	No Planned Svcs b4 Plan <b>(Never Collateral-always disallowed)</b>	Pend		
<b>PROGRESS NOTES</b>						
		PN	F-F time in person only, not for phone—then indicate in <u>body of note</u> *time-based codes disallowed if not	Yes*		
		PN < 5days	Documentation time < 25% of Total Time or 10 mins (whichever is greater)	Yes		
		PN < 5 days	Presenting/Problem w update which <b>MUST</b> be directly <u>related</u> to an existing MH Obj	Yes		
		PN < 5 days	Staff Intervention Today detailed	Yes		
		PN < 5 days	Today's Client Response Detailed (including for Group)	Yes		
		PN < 5 days	No claiming for VM messages; faxing; non-tx report writing such as SSI disability; email or texting; scheduling; no shows; lock-outs when ct is in jail, juv hall, IMD, etc.; transporting Ct.; completing Brief Screening Tool; Non-SMHS svcs such as vocational, housing, payee, etc.	Yes		
<b>PLAN UPDATES</b>						
		Plan Updates when signif events—i.e hospitalization, school susp, S/I, H/I, etc.	Plan must be reconsidered for Update and acted upon as needed—doc in PN	Yes		