Protocol for Printing Client's Chart in Response to "Subpoena to Release Records" or "Client Request for Records"

Step 1: Review Request with clinical team, and **for subpoena send subpoena to QM**.

Step 2: In Avatar print the following documents listed below.

Step 3: Review the episode display (**if the client was opened earlier than 2010 request the chart from storage and make a copy of the documents listed below).

Step 4: BEFORE providing the documents ask the clinical staff to review the documents and **WAIT** for QM's approval to release to the court.

Step 5: Any questions or other types of records release please contact QM.

QM Contact Information: Unit Chief – 650-573-2323, Program Specialist – 650-573-2331
HS_BHRS_QM@smcgov.org

In Avatar You Will Print Documents From the Following Sections:

BHRS Episode Display

Client Information/Consent -**Urgent care plan only (have clinician review before release)

Medical

Client Views

Documents (**not restricted**)

BHRS Episode Display (To find in Avatar utilize search forms in Avatar "BHRS Episode Display", double click and report will open, print this report.

Client Information/Consent

Print **URGENT CARE PLAN** (To find in Avatar open the client's chart, in chart on the left side find the column title "Client Information/Consent", in that section its listed as "URGENT CARE PLAN", double click and report will open, print this report.

MEDICAL

Print <u>any</u> documents in the Medical Section (such as Total Wellness SID, AIMS, etc.) by opening the client's Avatar chart, in chart on the left side find the column title Medical
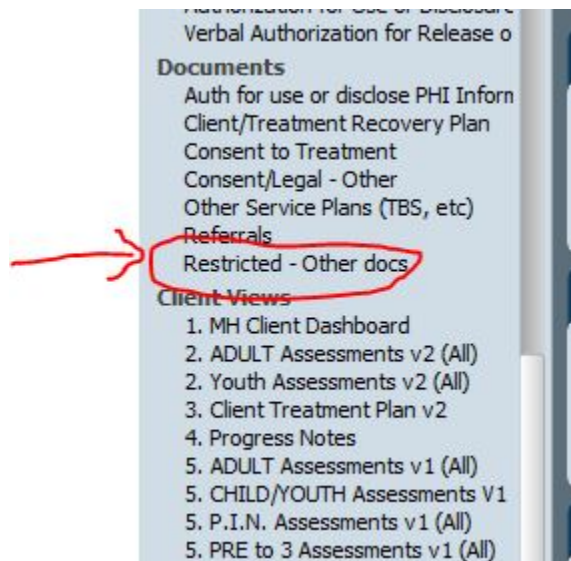
CLIENT VIEWS

Open the client's Avatar chart, in "chart" on the left side find the column title "Client Views"-

double click on each report and the report will open, print this

report. (See example to the right).

Print all of the following **"Client Views" reports**:

1. MH Client Dashboard
2. ADULT Assessments v2(All)
2. Youth Assessments v2(All)
3. Client Treatment Plan v2
4. Progress Notes ** **EXCEPTION** – all Restricted labeled notes must be reviewed by a clinician. (If applicable, for subpoenas, verify the timeframe of the notes requested).
5. ADULT Assessments v1(All)
5. CHILD/Youth Assessments V1
5. P.I.N Assessments v1 (All)
5. PRE to 3 Assessments v1 (All)

DOCUMENTS

Print out all **scanned documents** in the chart. (*****EXCEPTION** – do **NOT** print documents in folder "Restricted – Other docs", see

example below). To find in Avatar, open client's chart, in chart on

the left side find the column titled "Documents", all scanned

documents in chart print out