

SAN MATEO COUNTY  
MENTAL HEALTH SERVICES DIVISION

DATE: February 25, 2005

MENTAL HEALTH POLICY NO.: MH 05-06

SUBJECT: Clinical Forms

AUTHORITY: Divisional; DMH Contract

SUPERSEDES: Prior existing practice

#### DEFINITION

For the purposes of this policy, clinical forms are defined as any form, whether in hard copy or available electronically, that will contain clinical information pertinent to diagnosis, treatment, authorization and/or referral of clients. Clinical forms are client specific and completed forms are maintained in the client record and/or the authorization record.

#### PURPOSE

To assure that all clinical forms in use within Mental Health Services comply with the most current state and federal regulations, record information that is essential to quality care, are supportive of the principles of recovery and cultural competence, and are consistent from unit to unit.

#### POLICY

1. No individual clinician or individual unit or team may begin using a new clinical form until it has received approval from the Quality Improvement Committee. This includes, but is not limited, to the following categories of forms:
  - ICI Forms
  - Authorization Request Forms
  - Assessment Forms
  - Physician's Initial Note
  - Progress (Activity) Notes, including Group Activity Notes

- Transfer Forms
  - Discharge Forms
  - Special Data Collection Forms (ex: related to Best Practices)
  - Translation of Forms into a language other than English
2. In addition to the above, forms involving medication management must have the approval of the Medical Director before review by the Quality Improvement Committee.
  3. Before a staff member begins to use a form that has been individually adapted into an electronic template for personal use by that clinician, a copy of the product must be referred to the Quality Improvement Manager, for review and approval (e.g. Progress Notes).
  4. New forms may be “piloted”, in advance of final adoption, only with the approval of the Quality Improvement Manager

Approved:

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Gale Bataille, Director  
Mental Health Services Division

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Patrick Miles, PhD  
QI Manager and Custodian of Records