

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 any 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

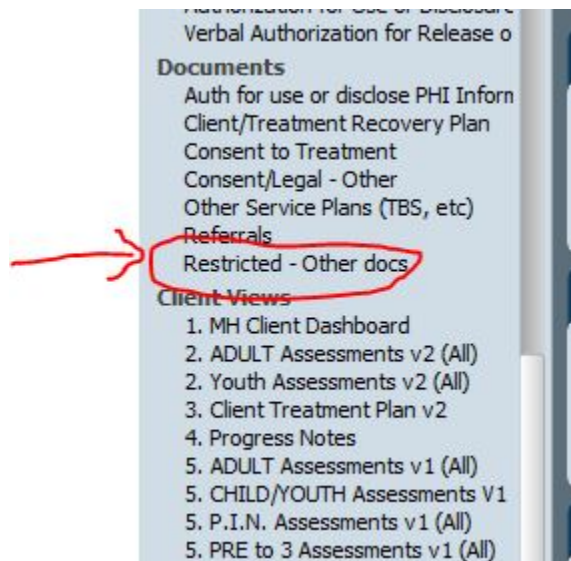
Open the client's Avatar chart, in "chart" on the left side find the column title "Client Views"- double click on each report and the report will open, print this report. (See example to the right).

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)
- Call Intake History
ICI

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



Home jolly T
TEST, JOLLY (000938760)
M, 54, 12/05/1962

Chart Overview Overview

Vitals Entry
AIMS (Abnormal Involuntary Move
Physician's Initial Assessment (PIN
Total Wellness SID

Contractor Forms
Contractor/Field Based Treatment
Contractor LOCUS Entry
Contractor CALOCUS Entry

Financial and Authorizations
Financial Eligibility
Day Treatment Authorization
Day Treatment Authorization Appr

Consents
Application for Services and Conse
Verification of Consent to Medicati
Authorization for Use or Disclosure
Verbal Authorization for Release o

Documents
26.5 Consent to Assessmnt Plan (f
Annual Assessment
Auth for use or disclose PHI Inform
Client/Treatment Recovery Plan
Consent to Treatment
Correspondence - Other
Court Reports
Screening - Service Connect Only

Client Views
1. MH Client Dashboard
2. ADULT Assessments v2 (All)
2. Youth Assessments v2 (All)
3. Client Treatment Plan v2
4. Progress Notes
5. ADULT Assessments v1 (All)
5. CHILD/YOUTH Assessments V1
5. P.I.N. Assessments v1 (All)
5. PRE to 3 Assessments v1 (All)
Call Intake History
Consent Tracking
DX from Assess. ADULT
DX from Assess. YOUTH
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Past Appoi
Date
2017-09-14
2017-08-31
2017-08-17
2017-08-03
2017-07-21
2017-07-20
2017-07-19
2017-07-18
2017-07-06
2017-06-22
2017-06-08

Upcoming Ap
Medication
Med Name
hydroCHLORO
Acetaminophen
Current Op
EP Program
998500 NMT
29 SEQ. MODE
THERAP.
Treatment
ID
938760
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SMBHRS myAvatar Live