

## SCANNED DOCUMENT MANAGEMENT

DOCUMENT NAME AND DATE OF DOCUMENT	AVATAR DOCUMENT MANAGEMENT CATEGORY	COMMENTS
	<b>Access Forms</b>	<b>This folder is only to be used by Access effective 9/10/20</b>
Access Referral	Access Forms	
Detailed Authorization for Out of County Clients	Access Forms	
Service request and supporting docs	Access Forms	
Wrap Around Referral Exception	Access Forms	
	<b>Access Only: Client Correspondence</b>	
Hospital Appointment Letters	Access Only: Client Correspondence	
Unable to Contact Letters	Access Only: Client Correspondence	
	<b>Access Only: Court/ Legal</b>	
APS/ CPS Reports	Access Only: Court/ Legal	
Court Orders	Access Only: Court/ Legal	
Court-Related Documentation that is attached to a Service Request	Access Only: Court/ Legal	
	<b>Access Only: Financial Information</b>	
Presumptive Eligibility Letters (AB 1299)	Access Only: Financial Information	
Service Authorization Requests (SARs)	Access Only: Financial Information	
	<b>Access Only: Release of Information</b>	
ROI to Access Team	Access Only: Release of Information	
	<b>Access Only: Unlinked Client Records</b>	
Unlinked Client Plans that are attached to a Service Request.	Access Only: Unlinked Client Records	
	<b>Acute Inpatient UR</b>	<b>This folder is only to be used by Inpatient UR</b>
Concurrent Review Documents	Acute Inpatient UR	
Inpatient UR Tool	Acute Inpatient UR	
TAR	Acute Inpatient UR	
	<b>ADS Assessment Verification Form</b>	<b>This folder is only to be used by ADS Programs</b>
Verification of ADS Assessment	ADS Assessment Verification Form	

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	<b>ADS Referral/Auth</b>	<b>This folder is only to be used by ADS Programs</b>
Outgoing Referrals to Other Contracted Programs	ADS Referral/Auth	
Referral and Authorization	ADS Referral/Auth	
	<b>ADS Related Medical Clearance Info</b>	<b>This folder is only to be used by ADS Programs</b>
Medical clearance or Physician letters	ADS Related Medical Clearance Info	
	<b>Assessments</b>	
1st AMSP	Assessments	
3Ms	Assessments	
Alcohol Withdrawal Assessment	Assessments	
CalWorks Assessments	Assessments	
CIWA (Alcohol Assessment by M.D.)	Assessments	
Clinical Assessment Tools	Assessments	
Code Blue	Assessments	
Historical Core Assessments	Assessments	
IP-CANS	Assessments	
KETs	Assessments	
Living Skills Assessment	Assessments	
Mode 60 Forms	Assessments	
PAF	Assessments	
Post Fall Assessment	Assessments	
Preschool CANS	Assessments	
QI Assessment for STRTPs	Assessments	
TBS Assessment - from Primary Provider	Assessments	
	<b>Benefit Acquisition</b>	
Applications for SSI / Medi-Cal	Benefit Acquisition	
MD SSI forms	Benefit Acquisition	
Physician's/Medical Officer's Statement, Patient's Capacity to Manage Benefits	Benefit Acquisition	
Requested Information for SSI	Benefit Acquisition	
	<b>Child and Family Team Info</b>	

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CFT Action Plans	Child and Family Team Info	
CFT Minutes	Child and Family Team Info	
TDMs	Child and Family Team Info	
	<b>Client Correspondence</b>	
ADS-CPS Referrals (including CPS Attorney Referrals)	Client Correspondence	
ADS-Other Referrals (APS, CDCR, DUI, MH, Probation, etc.)	Client Correspondence	
Client Voter form	Client Correspondence	
Patient Notes and Letters	Client Correspondence	
	<b>Client Plans - Not Avatar Generated</b>	
Behavioral Contract	Client Plans - Not Avatar Generated	Once signed by patient, this will be scanned
Client Plan (if signature was obtained later, if Avatar was offline, etc.)	Client Plans - Not Avatar Generated	
Client Plans from other agencies	Client Plans - Not Avatar Generated	
Crisis Residential Weekly Updates	Client Plans - Not Avatar Generated	
Inpatient Program Schedule	Client Plans - Not Avatar Generated	
ISU Team Discharge Instructions for Minors	Client Plans - Not Avatar Generated	
Mental Health Wellness Plan	Client Plans - Not Avatar Generated	
MHSA Client Housing Plan	Client Plans - Not Avatar Generated	
Safety Plans	Client Plans - Not Avatar Generated	
Sample Safety Plan	Client Plans - Not Avatar Generated	
Treatment Plan for Preparation for Discharge	Client Plans - Not Avatar Generated	
	<b>Collateral Clinical Documents</b>	
Access Forms, Faxes and Correspondence	Collateral Clinical Documents	
Approval of Prescription Drug Coverage	Collateral Clinical Documents	
Assessments/Evaluations from State Hospitals	Collateral Clinical Documents	
AWOL Report	Collateral Clinical Documents	
CRP Extension Requests (past 30 days)	Collateral Clinical Documents	
Discharge summaries for linked clients	Collateral Clinical Documents	
Group home Information Sheet (provided by Group home staff, i.e. for MERT)	Collateral Clinical Documents	
Group sign off document	Collateral Clinical Documents	
Leave of Absence	Collateral Clinical Documents	
LOCUS' Completed by other agencies	Collateral Clinical Documents	
LOCUS Hospital Packets at time of linkage	Collateral Clinical Documents	

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DOCUMENT NAME AND DATE OF DOCUMENT	AVATAR DOCUMENT MANAGEMENT CATEGORY	COMMENTS
NON-MHTC Business Cards	Collateral Clinical Documents	
PCP Records	Collateral Clinical Documents	
Progress Notes and discharge summaries from other agencies (Not Hospitals)	Collateral Clinical Documents	
Quarterly Report to CPS	Collateral Clinical Documents	
Service Requests/FAST Referral and collateral documents	Collateral Clinical Documents	
	<b>Continuity of Care Document</b>	
	<b>Continuity of Care Record</b>	
	<b>Continuity of Care Forms</b>	
CareQuality Notification Form	Continuity of Care Forms	If opting out send form to QMInformation@sacounty.net
	<b>Court/ Legal</b>	
5150	Court/ Legal	
1570 Form for Commitment to State Hospital	Court/ Legal	
5150 Involuntary Patient Advisement	Court/ Legal	
5250 – Notice of Additional 14-day Certification	Court/ Legal	
5250 Certification Review Hearing – Record and Decision (yellow sheet)	Court/ Legal	
5270 Certification Review Hearing – Record and Decision (yellow sheet)	Court/ Legal	
5270 Notice of Additional 30-day Certification	Court/ Legal	
Advance Medical Directive	Court/ Legal	
Affidavit of Identity for U.S. Citizen or National	Court/ Legal	Will be named 1570 for NSH (Napa State Hospital), PSH (Patton State Hospital), etc.
Clinician's Affidavit for Suicidal Patient	Court/ Legal	
Conservatorship papers in chronological order (TCON Referral from MHTC) (TCON Granted from court)	Court/ Legal	
Court Document Appointing guardianship of a minor	Court/ Legal	
Family Court Documents (Custody, Visitation, Etc.)	Court/ Legal	
Guardianship Documents	Court/ Legal	
Mental Health Court Documents	Court/ Legal	
Mental Health Facilities Report of Firearms Prohibition – DOJ form	Court/ Legal	
Notice of Adverse Benefit Determination (NOABD)	Court/ Legal	
Notice of Certification Hearing (to Patient - 5250,5270,etc.)	Court/ Legal	
Notice of Intent to Request Conservatorship (NOI)	Court/ Legal	

## SCANNED DOCUMENT MANAGEMENT

DOCUMENT NAME AND DATE OF DOCUMENT	AVATAR DOCUMENT MANAGEMENT CATEGORY	COMMENTS
Order for Post certification Treatment of Imminently Dangerous Person - Hearing Results	Court/ Legal	
Patient Notification of Firearms Prohibition and Right to Hearing	Court/ Legal	
Petition for Post certification Treatment of a Dangerous Person	Court/ Legal	
Physician's Affidavit for a Dangerous Patient	Court/ Legal	
Physician's Affidavit for Suicidal Patient	Court/ Legal	
Proof of Service -Physician's Affidavit for a Dangerous Patient	Court/ Legal	
Request For Hearing For Relief From Firearms Prohibition	Court/ Legal	
Subpoenas	Court/ Legal	
Tarasoff	Court/ Legal	
Voluntary Consent for Treatment/List of Patients Rights	Court/ Legal	
	<b>Court/ Legal Sensitive</b>	
1370 (Restoration of Competency-Misdemeanor)	Court/ Legal Sensitive	
Commitment Order for 1370	Court/ Legal Sensitive	
Conservator Request for transport form	Court/ Legal Sensitive	
CPS Reports (Juris, Dispo, Status Review, Etc.)	Court/ Legal Sensitive	
CPS/APS Reporting (Mandatory Reporting forms)	Court/ Legal Sensitive	
ECT	Court/ Legal Sensitive	
Health and Education Passport (HEP)	Court/ Legal Sensitive	
Law Enforcement Reports (patient or staff files report on another patient) Do not put names of both in one chart!!!Use white out!	Court/ Legal Sensitive	
M.D. Letter to Court re: 1370s	Court/ Legal Sensitive	
Public Guardian's Letter of High Risk to Provider	Court/ Legal Sensitive	
Riese - (Medical Capacity Hearing)	Court/ Legal Sensitive	
Sex Offender Address Update (to Sheriff or other LE)	Court/ Legal Sensitive	
Superior Court -Index Search System Results	Court/ Legal Sensitive	ISU intake gets copy from Facility Liaison. ISU can scan upon admit of 1370.
Writs	Court/ Legal Sensitive	
	<b>Education/ Employments Documents</b>	
504 Plans	Education/ Employments Documents	
Avatar Vocational Assessment	Education/ Employments Documents	
Behavior Support Plans	Education/ Employments Documents	
DOR Psychiatric Summary (signed by a licensed staff)	Education/ Employments Documents	
DOR/Crossroads Papers	Education/ Employments Documents	
EC Prescription Referral Form	Education/ Employments Documents	

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DOCUMENT NAME AND DATE OF DOCUMENT	AVATAR DOCUMENT MANAGEMENT CATEGORY	COMMENTS
EC Release of Information	Education/ Employments Documents	
IEP (Individualized Education Plan)	Education/ Employments Documents	
School Records (Report Cards, etc.)	Education/ Employments Documents	
SSTs	Education/ Employments Documents	
	<b>Financial Eligibility</b>	
Agreement to Pay (ATP) – white copy (Historical Document Replaced with FIF in 2016)	Financial Eligibility Information	
Correspondence from Social Security (i.e. change of payor/payee)	Financial Eligibility Information	
Financial Information Document (FID) (Historical Document Replaced with FIF in 2016)	Financial Eligibility Information	
Insurance Face sheet	Financial Eligibility Information	
Medical Screen from the Meds System	Financial Eligibility Information	
VA Contact Sheet	Financial Eligibility Information	
Advanced Beneficiary Notice (ABN)	Financial Eligibility Information	Episodic
	<b>Financial Information Form (FIF)</b>	
UMDAP	Financial Information Form (FIF)	Non-Episodic
Financial Information Form (FIF)	Financial Information Form (FIF)	Non-Episodic
	<b>HIPAA</b>	
Acknowledgement of Receipt	HIPAA	
Accounting Of Disclosures	HIPAA	
Client Request for Access to Health Record and M.D. Approval form	HIPAA	
Notice of Privacy Practices	HIPAA	
Privacy Policies by Year	HIPAA	
Request to Amend Records and Approved or Denied Response Forms	HIPAA	
	<b>Historical Chart Documents</b>	
All Historical Documents Prior to Avatar	Historical Chart Documents	Please label the Clinical Introductory Note and the Initial Psychiatric Assessment
Client Merge Notification	Historical Chart Documents	
	<b>Homeless Documentation</b>	
Chronic Homelessness Verification Form	Homeless Documentation	
Disability Certification	Homeless Documentation	
Proof of Income (No Income, Public Assistance, SSI Award Letter, Employment)	Homeless Documentation	

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Ready to Rent Intake Forms	Homeless Documentation	
Rent Assistance Calculator	Homeless Documentation	
Service Animal/Companion Animal Certification	Homeless Documentation	
Third Party Homeless Verification	Homeless Documentation	
	<b>Hospital Discharge</b>	
Aftercare Plan - signed by client	Hospital Discharge	
Hospital Discharge Paperwork (including Psychiatric hospitals)	Hospital Discharge	
	<b>ID and Insurance Cards</b>	
ADS-Booking	ID and Insurance Cards	
ADS-CADL	ID and Insurance Cards	
ADS-CAID	ID and Insurance Cards	
Identification card	ID and Insurance Cards	
Insurance Card	ID and Insurance Cards	
Medi-Cal, Medi-Care, Insurance card photocopies	ID and Insurance Cards	
MHTC Generated ID	ID and Insurance Cards	
Miscellaneous card (i.e., UCDCM card)	ID and Insurance Cards	
	<b>Incoming Correspondence</b>	
Medical Records Requests	Incoming Correspondence	
	<b>Intake Paperwork</b>	
Ambulance packet	Intake Paperwork	
ADS-Client Assessment Intake Sheet	Intake Paperwork	
ISU Nurse to Nurse Patient Final Arrival Screening	Intake Paperwork	
JV 583 Form	Intake Paperwork	
Reception Patient Worksheet	Intake Paperwork	
Referral Packets - clients accepted	Intake Paperwork	ISU: Should be included in Intake packet
TFC Referral Form & Screening Tool	Intake Paperwork	TFC Referral Form & Screening Tool into TFC Episode
VA contact sheet	Intake Paperwork	Episodic (Admitted MHTC, Crestwood Intake Scans)
	<b>Intake/Output</b>	

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Intake/Output Sheet	Intake/Output	MHTC
	<b>Labs</b>	
EKG Results	Labs	
Laboratory Results	Labs	
PPD Results letter	Labs	
Pregnancy Tests	Labs	
TB test results	Labs	
X-Ray Results	Labs	
	<b>Medication Consent</b>	
CURES	Medication Consent	
Inactivated Influenza Vaccine Patient Consent Form 2013-2014	Medication Consent	
Informed Consent for Treatment with Psychotropic Drugs	Medication Consent	
JV220 Documents	Medication Consent	
	<b>Medication Progress Notes</b>	
Client Prescription Refill Request	Medication Progress Notes	
Medical Practitioner (MD, PA, etc) notes	Medication Progress Notes	
Prescriptions	Medication Progress Notes	
Psychiatric Referrals	Medication Progress Notes	
	<b>MHTC 1:1 Flow Sheets</b>	
1:1 Flow sheets	MHTC 1:1 Flow Sheets	
	<b>MHTC Alerts</b>	
Client Merge Notification	MHTC Alert	Non-Episodic: Only seen by those with access to the MHTC system codes
Missing Persons Form	MHTC Alert	Non-Episodic: Only seen by those with access to the MHTC system codes
Provider Behavioral Plans/ISU MD Letter to ERs	MHTC Alert	Non-Episodic: Only seen by those with access to the MHTC system codes
Red Alert Sheets	MHTC Alert	Non-Episodic: Only seen by those with access to the MHTC system codes



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Tarasoff Forms	MHTC Alert	Non-Episodic: Only seen by those with access to the MHTC system codes
Termination of Conservatorship (if client is not inpatient at the time)	MHTC Alert	Non-Episodic: Only seen by those with access to the MHTC system codes
	<b>MHTC CR Interview Summary</b>	
Interview Summary from Crisis Residential	MHTC CR Interview Summary	
	<b>MHTC Denial of Rights</b>	
Denial of Rights Documentation Record- 15 min. Pink sheet	MHTC Denial of Rights	
Seclusion or Restraint Patient Debriefing	MHTC Denial of Rights	
	<b>MHTC HIPAA</b>	
MHTC Accounting of Disclosures	MHTC HIPAA	Non-Episodic: Only seen by those with access to the MHTC system codes
Requests to Amend Records / Response from MD	MHTC HIPAA	Non-Episodic: Only seen by those with access to the MHTC system codes
Client Request For Access To Health Records	MHTC HIPAA	Non-Episodic: Only seen by those with access to the MHTC system codes
	<b>MHTC MAR</b>	
MARs (Treatment/Standing and PRN)	MHTC MAR	Title type of MAR separately (TX,PRN/Standing) and put date range
	<b>MHTC Other Agency ROI</b>	
	<b>MHTC Physician Orders</b>	
All Physician Orders	MHTC Physician Orders	Scan all MD orders as one document and title with date range
	<b>MHTC Referrals not Accepted</b>	
Law Enforcement / MCST FAST Form	MHTC Referrals not Accepted	
MHTC Referral Packets - clients NOT accepted	MHTC Referrals not Accepted	If the client has an Avatar chart, scan into Non-Episodic

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	<b>MHTC ROI MHTC</b>	
Any ROI that <u>cannot be linked with one episode</u> and <u>is not a County form</u> . Scan the fax cover sheet with description of what was sent, and fax confirmation sheet and ROI as one unit. Examples: Jail, Turning Point or lawyers with ROI, etc	MHTC Other Agency ROI	Non-Episodic: Only seen by those with access to the MHTC system codes
Social Security or SMART Request for Records	MHTC Other Agency ROI	Non-Episodic: Only seen by those with access to the MHTC system codes
	<b>MHTC Subpoenas</b>	
MHTC Subpoenas	MHTC Subpoenas	Could be Episodic or Non-Episodic. If no ROI be sure to record release of records to County Council on Accounting of Disclosures
	<b>Non Medication Consents</b>	
Consent for HIV Testing	Non Medication Consents	
Consent to Photograph	Non Medication Consents	
Consent to treat (MERT)	Non Medication Consents	
Consent to Treat (Other)	Non Medication Consents	
Individual Consent	Non Medication Consents	
Informed Consent to Treat	Non Medication Consents	
JCE 366	Non Medication Consents	
Minor Consent Form	Non Medication Consents	
Telehealth Consent	Non Medication Consents	
Telepsychiatry Consent	Non Medication Consents	
Therapy Consent	Non Medication Consents	
	<b>Non Medication Progress Notes</b>	
Handwritten progress notes (Used only in power outage or if Avatar is not accessible as a system or by an individual staff on duty)	Non-Medication Progress Notes	MHTC
	<b>Outgoing Correspondence</b>	
Billing/Response letters to billers	Outgoing Correspondence	MHTC
Dr Thom follow-up letter	Outgoing Correspondence	MHTC
Letter from MHTC M.D. or clinician (Not related to 1370 or Benefits, i.e. letter to employer to excuse from work due to hospitalization)	Outgoing Correspondence	
Med lists sent to PCP or another provider	Outgoing Correspondence	
	<b>Patient Property</b>	

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Property Reports / signed	Patient Property	
Property Request Forms	Patient Property	
	<b>Providers with their own EHR-PT</b>	<b>This folder is only to be used by Providers with their own EHR to upload documentation supporting medical necessity for children/youth presumptively transferred to Sacramento</b>
Client Plans	Providers with their own EHR-PT	
Client Plans- Supporting documentation that includes the reasoning for missing signatures	Providers with their own EHR-PT	
Core Assessments	Providers with their own EHR-PT	
Initial Psychiatric Assessments	Providers with their own EHR-PT	
Medication Service Plans	Providers with their own EHR-PT	
TBS Adjunct Client Plan	Providers with their own EHR-PT	
	<b>Quality Control</b>	
	<b>Referral Attachments</b>	
	<b>Referrals for Other Services</b>	
AOD Referrals	Referrals for Other Services	
Benefits Management Corp Client Information Sheet and referral packet	Referrals for Other Services	
Dept of Human Assistance Patient Referral Form	Referrals for Other Services	
IMD Referrals	Referrals for Other Services	
Intensive Services Referral (LOCUS)	Referrals for Other Services	
MHTC Medical Consultation Request and documentation back from ED or outpatient appointment	Referrals for Other Services	Stamp individual RX as scanned and place in hard chart on unit
Physician's Report for Community Care Licensing/Appraisal Needs/Emergency Info Sheet	Referrals for Other Services	
RX from other agencies (i.e. RX from Med Clearance)	Referrals for Other Services	
Sac County Access Team Services Request and fax confirmations - scan as one document	Referrals for Other Services	
Sacramento County Bi-Directional Medi-Cal Transition of Care Request	Referrals for Other Services	
Treatment Summaries	Referrals for Other Services	
	<b>Release of Information</b>	
Authorization to Obtain (sent by MHTC) and fax confirmations (scan as one document)	Release of Information	

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Authorization to Release Health Records (SAC COUNTY and other agencies ROIs )Scan the fax cover sheet with description of what was sent, and fax confirmation sheet and ROI as one unit.	Release of Information	Episodic
Family Notification	Release of Information	Episodic
MDT ROI	Release of Information	
	<b>Screening</b>	
Adult Medi-Cal Mental Health Screening Tool	Screening	
ISU Patient Tuberculosis and Heath Questionnaire	Screening	
	<b>Sleep Log</b>	
Sleep Log	Sleep Log	
	<b>Supplemental Patient Photos</b>	
Photographs (i.e. injuries, etc.)	Supplemental Patient Photos	
	<b>Termination/ Exit Documents</b>	
Adult Access Intake Letter	Termination/ Exit Documents	
Leaving Hospital Against Medical Advice	Termination/ Exit Documents	
Transfer Forms	Termination/ Exit Documents	
	<b>Testing/ Evaluation</b>	
Psychiatric Tests	Testing/ Evaluation	
Psychological Assessment Summary	Testing/ Evaluation	
Psychological Tests	Testing/ Evaluation	
	<b>Visitor Slip</b>	
Visitor Slip	Visitor Slip	