

Documentation Matrix

	X= Required										X= Completed Under the Direction of the Supervisor										NO=No Access			ORDER CONNCT		
	Diagnosis	Crisis Screening & Assessment	Core Assessment	Client Plan	Client Housing Plan	Progress Note(s)	AMS	Health Questionnaire (Child/Adult)	Mental Status Exam (Child/Adult)	LOCUS	CODA (Co-Occurring Disorders Assessment)	Medication Service Plan	CANS Assessment	ANSA Assessment	Client Safety Plan	Vocational Assessment	ASI	TASI	SUD Assessment	Ca/OMS	Initial Psychiatric Assessment	Psychiatric Mental Status Exam	Prescriber	Prescriber Assent	Non-Prescriber	
MD Psychiatrist (MD) (Post Graduate Medical Doctor) (MD Psychiatrist (Medicare Certified))	X	NO	NO	NO	NO	X	X	NO	NO	NO	X	X	NO	NO	X	NO	NO	NO	NO	NO	X	X	X	NO	NO	
MD - Not Psychiatrist (MD - Not Psychiatrist) (Doctor of Osteopathy) (Medical Doctor)	X	NO	NO	NO	NO	X	X	NO	X	NO	X	X	NO	NO	X	NO	NO	NO	NO	NO	X	X	X	NO	NO	
MD Psych Resident - Licensed (MD Psych Resident - Licensed) (Post Graduate Medical Doctor) (Psych Resident Licensed (Medicare))	X	NO	NO	NO	NO	X	X	NO	NO	NO	X	X	NO	NO	X	NO	NO	NO	NO	NO	X	X	X	NO	NO	
MD Psych Resident - Unlicensed (MD Psych Resident - Unlicensed) (Post Graduate Medical Doctor)	X	NO	NO	NO	NO	X	X	NO	NO	NO	X	X	NO	NO	X	NO	NO	NO	NO	NO	X	X	NO	X	NO	
MD Psych Med Stud Clinical Clerkship (MD Psych Med Stud Clinical Clerkship) (Medical Student Clinical Clerkship) (Student Intern) (Medical Student) (Clerkship)	X	NO	NO	NO	NO	X	X	NO	NO	NO	X	X	NO	NO	X	NO	NO	NO	NO	NO	X	X	NO	X	NO	
Nurse Practitioner (Nurse Practitioner) (Family Nurse Practitioner) (Nurse Practitioner (Medicare Certified))	X	X	X	X	NO	X	X	X	X	X	X	X	NO	NO	X	NO	NO	NO	NO	NO	X	X	X	X	X	
Nurse Practitioner - Intern	X	NO	NO	NO	NO	X	X	NO	NO	NO	X	X	NO	NO	X	NO	NO	NO	NO	NO	X	X	NO	X	X	
Physician Assistant	X	NO	NO	NO	NO	X	X	NO	NO	NO	X	X	NO	NO	X	NO	NO	NO	NO	NO	X	X	X	X	X	
Registered Nurse	X	NO	NO	NO	NO	X	X	X	NO	NO	NO	NO	NO	NO	X	NO	NO	NO	NO	NO	NO	NO	NO	X	X	
LVN	NO	X	X	X	X	X	NO	X	X	X	NO	X	X	X	X	X	X	NO	NO	NO	NO	NO	X	X	X	
Licensed Psychiatric Technician (LPT) (Licensed Psychiatric Technician (LPT)) (Psychiatric Technician)	NO	X	X	X	X	X	NO	X	X	X	NO	X	X	X	X	X	X	NO	NO	NO	NO	NO	X	X	X	
PhD Psychologist (PhD Psychologist) (Licensed Psychologist) (PhD Psychologist (Medicare Certified))	X	X	X	X	X	X	NO	X	X	X	X	X	X	X	X	X	X	NO	NO	NO	NO	NO	NO	NO	NO	
PhD (Walvoord) (PhD (Walvoord)) (Registered Psychological Assistant) (Registered Psychologist)	X	X	X	X	X	X	NO	X	X	NO	X	NO	X	X	X	X	X	NO	NO	NO	NO	NO	NO	NO	NO	
MFT (Licensed Clinical Social Worker) (Licensed Clinical Social Worker Medicare)	X	X	X	X	X	X	NO	X	X	X	X	NO	X	X	X	X	X	NO	NO	NO	NO	NO	NO	NO	NO	
LPCC (Licensed Professional Clinical Counselor)	X	X	X	X	X	X	NO	X	X	X	X	NO	X	X	X	X	X	NO	NO	NO	NO	NO	NO	NO	NO	
Master's Level Unlicensed - Elig for Waiver (Master's Level Unlicensed - Elig for Waiver) (Associate Social Worker) (Associate Marriage and Family Therapist) (Associate Professional Clinical Counselor)	X	X	X	X	X	X	NO	X	X	X	X	NO	X	X	X	X	X	NO	NO	NO	NO	NO	NO	NO	NO	
Student/Intern (Student/Intern) (Master's Level Student)	NO	X	X	X	X	X	NO	X	X	X	NO	X	X	X	X	X	X	NO	NO	NO	NO	NO	NO	NO	NO	
Graduate Student (Psychologist Student) (Student Intern) (These are Pre-Post Doctoral Students - UCD Only)	X	X	X	X	X	X	NO	X	X	X	NO	X	X	X	X	X	X	NO	NO	NO	NO	NO	NO	NO	NO	
Mental Health Rehab Specialist	NO	X	X	X	X	X	NO	X	X	X	NO	X	X	X	X	X	X	NO	NO	NO	NO	NO	NO	NO	NO	
MHA I	NO	X	NO	NO	X	X	NO	NO	NO	NO	NO	NO	NO	NO	X	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	
MHA II	NO	X	NO	NO	X	X	NO	NO	NO	NO	NO	NO	NO	NO	X	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	
MHA III	NO	X	X	X	X	X	NO	X	X	X	NO	X	X	X	X	X	X	NO	NO	NO	NO	NO	NO	NO	NO	
Peer Staff/Employment Spec.	NO	X	NO	NO	NO	X/Peer	NO	NO	NO	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	
BH Peer Specialist	NO	X	NO	X	X	X	NO	NO	NO	NO	NO	NO	NO	NO	X	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	
Senior BH Peer Specialist	NO	X	NO	X	X	X	NO	NO	NO	NO	NO	NO	NO	NO	X	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	
BH Peer Program Manager	NO	X	NO	X	X	X	NO	NO	NO	NO	NO	NO	NO	X	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO	
ADS MD	X	NO	NO	NO	NO	X	NO	NO	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	NO	
ADS NP	X	NO	NO	NO	NO	X	NO	NO	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	NO	
ADS PA	X	NO	NO	NO	NO	X	NO	NO	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	NO	
ADS RN	X	NO	NO	NO	NO	X	NO	X	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	NO	
ADS LVN	NO	NO	NO	X	NO	X	NO	X	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	NO	
ADS PHD Psychologist	X	X	X	X	NO	X	NO	X	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	NO	
ADS MFT	X	X	X	X	NO	X	NO	X	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	NO	
ADS LCSW	X	X	X	X	NO	X	NO	X	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	NO	
ADS LPCC	X	X	X	X	NO	X	NO	X	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	NO	
ADS Master's Level Unlicensed - Elig for Waiver (Master's Level Unlicensed - Elig for Waiver) (Associate Social Worker) (Associate Marriage and Family Therapist) (Associate Professional Clinical Counselor)	X	X	X	X	NO	X	NO	X	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	NO	
ADS Counselor I (ADS Counselor I) (Alcohol And Drug Counselor)	NO	X	NO	X	NO	X	NO	X	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	NO	
ADS Counselor II (ADS Counselor II) (Alcohol And Drug Counselor)	NO	X	NO	X	NO	X	NO	X	NO	NO	NO	NO	NO	X	NO	X	NO	X	X	NO	NO	NO	NO	NO	NO	

