



## Scanning Guide – updated 6/17/2021

**All scanned documents must have consumer name and medical record number on the first page of each document.**

<b>DOCUMENT</b>	<b>CHART SECTION</b>	<b>CHART LINK</b>
ABA Quarterly Report	Clinical Services	Autism
ABA Treatment Plan	Clinical Services	Autism
Activity Liability Release Form	Legal, Consents, Correspondence	Other Legal Info
Administrative/Finance Information	Administrative/Finance	Other Admin/Finance
Adult Access Screening Tool	Clinical Services	Screening Tools/Testing
Adult Home Health Award Letter (DHS)	Administrative/Finance	DHHS
Adult Protective Services Referral Letter	Administrative/Finance	DHHS
Advance Directive (full document)	Clinical Services	Advance Directives
Advance Directive Acknowledgement	Clinical Services	Advance Directives
AFC Admission Sheet	Administrative/Finance	AFC
AFC Assessment (DHS-3265)	Clinical Services	AFC
AFC Documents – Other	Clinical Services	AFC
Affidavit of Personal Representative Requesting Records	Legal, Consents, Correspondence	Other Legal Info
AFLS Master Scoring Form	Clinical Services	Autism
AIMS Worksheet	Health Services	Other Psychiatric/Medical
Assessment Plan for AFC Residents (DHS-3265)	Clinical Services	AFC
Auricular Acupuncture Informed Consent	Legal, Consents, Correspondence	Other Consents
Autopsy Report	Clinical Services	Other Clinical Docs (add note indicating Autopsy Report)
Baby Court Referral Form	Clinical Services	Other Clinical Docs
Behavior Support Plan	Clinical Services	Behavior Plan Documents
Behavior Support Plan Consent	Clinical Services	Behavior Plan Documents
Behavior Treatment Committee – Staff Report Form	Clinical Services	Behavior Plan Documents
Brief Behavior Activation Therapy (BBAT) Documents	Clinical Services	Other Clinical Docs
BSFT Forms	Clinical Services	EBP Documents
Budgets for Choice Voucher Arrangements	Administrative/Finance	Self-Determination/ Choice Voucher

<b>DOCUMENT</b>	<b>CHART SECTION</b>	<b>CHART LINK</b>
CAFAS	Clinical Services	Screening Tools/Testing
Child Access Screening Tool	Clinical Services	Screening Tools/Testing
Choice Voucher Agreements & Amendments	Administrative/Finance	Self-Determination/ Choice Voucher
Clinical Information – Other	Clinical Services	Other Clinical Docs
CLS Profile	Clinical Services	CLS Documents
CLS Progress Note	Clinical Services	CLS Documents
CLS Utilization Review	Clinical Services	CLS Documents
Closing Report	Clinical Services	Other Clinical Docs
Clubhouse Attendance Calendar	Clinical Services	Clubhouse
Clubhouse Member Notes	Clinical Services	Clubhouse
CMIT, Suicide Assessment & Housing Recommendation*	Hospital Records/Crisis	Emerg Screen/Prog Note
COFR Addendum (Expense COFR)	Clinical Services	Other Clinical Docs
COFR Assessment (Expense COFR)	Clinical Services	Other Clinical Docs
COFR BH-TEDS (Expense COFR)	Clinical Services	Other Clinical Docs
COFR Health Screen	Health Services	Health Screen
COFR Payer Authorization (Expense COFR)	Legal, Consent, Correspondence	Correspondence/Letters
COFR Payer Authorization (Revenue COFR)	Administrative/Finance	Insurance/Funding Source
COFR Person-Centered Plan (Expense COFR)	Clinical Services	Attach to Data Entered PCP
COFR Progress Note (Expense COFR)	Clinical Services	Other Clinical Docs
COFR Review of Progress (Expense COFR)	Clinical Services	Other Clinical Docs
Community Care Form	Clinical Services	Community Care Plans
Consent for Audio-Monitoring in SLT	Legal, Consents, Correspondence	Other Consents
Consent for Medical Services	Health Services	Consent for Medical Treatment
Consent for Participation in CMHCM	Legal, Consents, Correspondence	Other Consents
Consent for Placement/Medical Treatment for Foster Youth	Legal, Consents, Correspondence	Other Consents
Consent to Photograph	Legal, Consents, Correspondence	Other Consents
Consent to Routine Medical Care Card from DHHS	Legal, Consents, Correspondence	Other Consents
Consents – Other	Legal, Consents, Correspondence	Other Consents
Consents – Revoked	Legal, Consents, Correspondence	Other Consents
Consumer Reference Sheet (PERS)	Clinical Services	PERS

<b>DOCUMENT</b>	<b>CHART SECTION</b>	<b>CHART LINK</b>
Contract Residential Unbundling Form	Clinical Services	Other Clinical Docs
Controlled Substance Agreement	Health Services	Clinical Note
Copy of PHCP Scripts	Health Services	PHCP
Correspondence	Legal, Consents, Correspondence	Correspondence/Letters
Court Orders	Legal, Consents, Correspondence	Court Services Orders
Crisis Prevention and Safety Planning	Clinical Services	Crisis Prevention and Safety Planning
Crisis Residential	Hospital Records/Crisis	Other Hospital/Crisis
CRCT Case Consultation Form	Clinical Services	Attach to Corresponding Consultation Note
Data Sheet & Prescription for Personal Use (DHS-3803)	Clinical Services	AFC
DBT Diary Notes	Clinical Services	EBP Documents
DBT Telephone Skills Coaching Progress Notes	Clinical Services	EBP Documents
DD Access Screening Tool	Clinical Services	Screening Tools/Testing
Devereux Early Childhood Assessment for Infants	Clinical Services	EBP Documents
Devereux Toddler Record Form	Clinical Services	EBP Documents
DHS/SSA Referral (DHS-3471)	Administrative/Finance	DHHS
Durable Power of Attorney	Legal, Consents, Correspondence	Other Legal Info
e-DECA	Clinical Services	EBP Documents
EBP – Other	Clinical Services	EBP Documents
Email to/from Consumer	Clinical Services	Attach to Corresponding Progress Note
Email to/from Others (Staff)	Legal, Consents, Correspondence	Correspondence/Letters
Emergency Room*	Hospital Records/Crisis	Emerg Screen/Clinic Note
Exit Report (Autism)	Clinical Services	Autism
Family Psychoeducation (FPE) Documents	Clinical Services	Other Clinical Docs
Fee Discussion	Administrative/Finance	Self-Pay Policy
Final Face Sheet	Other	Scanned Archival/ Clinical
First Step Behavior Plan	Clinical Services	Behavior Plan Docs
Functional Assessment Screening Tool (FAST)	Clinical Services	Behavior Plan Docs
GAIN-Q3	Clinical Services	EBP Documents
Guardianship Papers	Legal, Consents, Correspondence	Guardianship Papers
Health Care Appraisal	Health Services	PHCP
Health Screen	Health Services	Health Screenings

<b>DOCUMENT</b>	<b>CHART SECTION</b>	<b>CHART LINK</b>
Health Screen Signature Page	Health Services	Health Screenings
HIPAA Acknowledgement and Consent to Contact	Legal, Consents, Correspondence	HIPAA
Historical Medical Documents	Health Services	Other Psychiatric/Medical
Historic Psychiatric Hospitalizations	Hospital Records/Crisis	Hospital Correspondence
Home Provider's Report	Clinical Services	AFC
Hospice Documents	Health Services	Other Psychiatric/Medical
Hospital Admission Note*	Hospital Records/Crisis	Emerg Screen/Clinic Note
Hospital Consultations*	Hospital Records/Crisis	Emerg Screen/Clinic Note
Hospital Correspondence*	Hospital Records/Crisis	Hospital Correspondence
Hospital Discharge Instructions*	Hospital Records/Crisis	Emerg Screen/Clinic Note
Hospital Discharge Summary*	Hospital Records/Crisis	Emerg Screen/Clinic Note
Hospital Notes*	Hospital Records/Crisis	Hospital Correspondence
Hospital/Crisis Information – Other*	Hospital Records/Crisis	Emerg Screen/Clinic Note
IEPC Reports	Clinical Services	School/IEPC
Insurance Card Photos	Administrative/Finance	Insurance/Funding Source
Jail Diversion Note	Clinical Services	Jail Documents
Jail Diversion Pre/Post Booking Jail Services	Clinical Services	Jail Documents
Jail Referral	Clinical Services	Jail Documents
Lab Reports	Health Services	Labs
Legal Information – Other	Legal, Consents, Correspondence	Other Legal Info
Letter – 2 <sup>nd</sup> Missed AS Appointment	Legal, Consents, Correspondence	Correspondence/Letters
Letter – Closing Planned	Legal, Consents, Correspondence	Correspondence/Letters
Letter – Closing Withdrew (Staff Concerns)	Legal, Consents, Correspondence	Correspondence/Letters
Letter – Closing Withdrew from Services	Legal, Consents, Correspondence	Correspondence/Letters
Letter – From CMHCM Prescriber to Health Care Provider	Legal, Consents, Correspondence	Correspondence/Letters
Letter – From Health Care Provider to CMHCM Prescriber	Legal, Consents, Correspondence	Correspondence/Letters
Letter – Miscellaneous	Legal, Consents, Correspondence	Correspondence/Letters
Letter – Missed AS Appointment	Legal, Consents, Correspondence	Correspondence/Letters
Letter – No Show	Legal, Consents, Correspondence	Correspondence/Letters
Letter – Non-Eligible Referrals	Legal, Consents, Correspondence	Correspondence/Letters

<b>DOCUMENT</b>	<b>CHART SECTION</b>	<b>CHART LINK</b>
Letter – Transferred to Walk-In	Legal, Consents, Correspondence	Correspondence/Letters
Letter – Wait List	Legal, Consents, Correspondence	Correspondence/Letters
Letter – Withdrew from AS Appointment	Legal, Consents, Correspondence	Correspondence/Letters
Living in Balance Documents	Clinical Services	Other Clinical Docs
Medicaid Provider Agreement (CLS)	Administrative/Finance	Self-Determination/ Choice Voucher
Medicaid Provider Assurance (CLS)	Administrative/Finance	Self-Determination/ Choice Voucher
Medical Needs (DHS 54a)	Administrative/Finance	DHHS
Medical Information – Other	Health Services	Other Psychiatric/Medical
Medical Passport (DHHS form)	Administrative/Finance	DHHS
Medical Verification for Transport	Administrative/Finance	DHHS
Medication Administration Form	Administrative/Finance	AFC
Medication Consent	Health Services	Signed Med Consents
Modified Checklist for Autism in Toddlers (MCHAT)	Clinical Services	Autism
MRS Referral Form (non-SE consumer)	Clinical Services	Other Clinical Docs
MST Forms	Clinical Services	EBP Documents
NCTSN Resource Parent Training Pre-Test	Clinical Services	EBP Documents
Notices of Benefit Determination	Administrative/Finance	Notices of Benefit Determination (Scanned)
OBRA Assessment (MDHHS Comp Level II Eval)	Clinical Services	OBRA
OBRA 3877 (PAS (ARR))	Clinical Services	OBRA
OBRA 3878 (MI/MR/RC Exemption Crit)	Clinical Services	OBRA
Occupational Therapy (OT) Assessment	Clinical Services	Other Clinical Docs
Occupational Therapy Data Sheet	Clinical Services	Other Clinical Docs
Occupational Therapy Prescriptions	Clinical Services	Program Referral Forms (attach to OT Referral)
Occupational Therapy Programs/Monitoring/Reviews	Clinical Services	Other Clinical Docs
Patient Assistance Program – Prescriptions	Health Services	Other Psychiatric/Medical
Patient Health Questionnaire (U of M form)	Health Services	Clinic Note
Payee Designation form (MDHHS)	Legal, Consents, Correspondence	Other Legal Info
PCIT Forms	Clinical Services	EPB Documents
PCP/Addendum Training Record	Clinical Services	PCP
PCP Signature Sheet	Clinical Services	PCP
Peer Support Checklist	Clinical Services	Progress Note (attach)

<b>DOCUMENT</b>	<b>CHART SECTION</b>	<b>CHART LINK</b>
PERS Documents	Clinical Services	PERS
Personal Care Logs	Administrative/Finance <u>OR</u> Clinical Services	AFC, SD, Choice Voucher, CLS (depending on service)
Personal Care Services Provider Log	Administrative/Finance	DHHS
Physical Exam Report	Health Services	PHCP
Physical Therapy (PT) Assessment	Clinical Services	Other Clinical Docs
Physician's Orders for AFC	Health Services	PHCP
Police Reports	Legal, Consents, Correspondence	Other Legal Info
Power of Attorney (for Minors, Common Law or Other)	Legal, Consents, Correspondence	Guardianship Papers
Prescription for Personal Care Services	Health Services	Other Psychiatric/Medical
Prescriptions – CMHCM	Health Services	Other Psychiatric/Medical
Prescriptions – Community Health Care Providers	Health Services	PHCP
Prescriptions – Occupational or Physical Therapy	Health Services	PHCP
Prescriptions – Prior Authorizations	Health Services	Other Psychiatric/Medical
Project Calm Forms	Clinical Services	Other Clinical Docs
Prolonged Exposure Consent to Photograph/ Audiotape/ Videotape or for Use of One-Way Glass	Legal, Consents, Correspondence	Other Consents
Prolonged Exposure (PE) Survey Packets	Clinical Services	EBP Documents
Proof of Income Documents	Administrative/Finance	Fee Discussion
PSI-4 (U of M form)	Clinical Services	EBP Documents
Psychological Evaluation	Clinical Services	Other Clinical Docs
Psychological Testing	Clinical Services	Screening Tools/Testing
Psychotropic Informed Consent (DHS-1643)	Health Services	Signed Med Consents
PTSD Checklist	Clinical Services	Screening Tools/Testing
Quality of Life Documentation Form for Non-Residential	Clinical Services	PCP
Quality of Life Documentation Form for Residential	Clinical Services	PCP
Recovering Youth Future Data Form	Clinical Services	EBP Documents
Relapse Prevention or Harm Reduction Plan	Clinical Services	Other Clinical Services
Releases Requesting Information	Legal, Consents, Correspondence	Other Consents
Report of Suspected Child Abuse & Neglect (DHS-3200)	Administrative/Finance	DHHS
Respite Acknowledgement	Administrative/Finance	Respite
Respite Spreadsheets	Administrative/Finance	Respite

Respite Timesheets	Administrative/Finance	Respite
<b>DOCUMENT</b>	<b>CHART SECTION</b>	<b>CHART LINK</b>
Retro Account Detail	Administrative/Finance	Other Admin/Finance
Retro Account Summary	Administrative/Finance	Other Admin/Finance
Retrospective Review	Clinical Services	Other Clinical Services (Retro Review Packet)
Review of Systems – Initial	Health Services	Clinic Note
Review of Systems – Return Visit	Health Services	Clinic Note
Revocation Form	Legal, Consents, Correspondence	Other Consents
Sample Medication Information Documents	Health Services	Other Psychiatric/Medical
Schema Forms	Clinical Services	Other Clinical Docs
Seeking Safety Forms	Clinical Services	Other Clinical Docs
Self-Determination (SD) Budget Worksheet	Administrative/Finance	Self Determination/ Choice Voucher
Self-Determination (SD) Provider Agreement (CLS)	Administrative/Finance	Self-Determination/ Choice Voucher
Severity Measure for Depression – Adult	Health Services	Clinic Note
SIS	Clinical Services	Screening Tools/Testing
Smoking Cessation Forms	Clinical Services	Other Clinical Docs
Social Communication Questionnaire (SCQ)	Clinical Services	Autism
Spenddown Documents	Administrative/Finance	Insurance Policies
Strengths & Cultural Narrative	Clinical Services	Wraparound
Supported Employment (SE) Forms	Supported Employment	SE EBP Forms
Supported Employment Progress Notes (CMHCM-1216)	Clinical Services	Vocational Services
Telehealth Informed Consent	Legal/Consents/Correspondence	Other Consents
Time & Task Reports	Administrative/Finance	DHHS
Trauma Focused CBT (TF-CBT) Forms	Clinical Services	Other Clinical Docs
TREM Forms	Clinical Services	EBP Documents
Urine Drug Test Requisition (Order Form)	Health Services	Clinic Note
Urine Drug Test Results	Health Services	Labs
VB-MAPP Master Scoring Form	Clinical Services	Autism
VB-MAPP Reassessment Report	Clinical Services	Autism
VB-MAPP Report	Clinical Services	Autism
Waiver Eligibility Certification (MDHHS)	Legal, Consents, Correspondence	MDCH Waiver
Waiver Consent (MDHHS)	Legal, Consents, Correspondence	MDCH Waiver

Waiver Re-Certification (MDHHS)	Legal, Consents, Correspondence	MDCH Waiver
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<b>DOCUMENT</b>	<b>CHART SECTION</b>	<b>CHART LINK</b>
Web Denis/C-Snap	Administrative/Finance	Insurance Policies
Worksheet B	Administrative/Finance	Fee Discussion
Workshop/Day Program Documents	Clinical Services	Vocational Services
Wraparound Forms (all)	Clinical Services	Wraparound
Youth/Family Safety Plan	Clinical Services	Crisis Prevention and Safety Planning

\*Hospital/Emergency Screening documents are scanned centrally by the Midland Office (see CIGMMO Help/Emergency Screenings for scanning detail).

\*\*Recent or requested psychiatric hospitalization information is first given to the hospital liaison who will review and label for scanning.