POLICY AND PROCEDURES FOR DOCUMENTATION

REVISED DATE: 03/17

POLICY:

All client-related documentation shall be maintained in a legible, consistent and legally acceptable format.

PROCEDURES:

1. All client-related documentation produced and/or signed by agency staff will be accurate and complete to the best of the knowledge of the individual producing and/or signing the document.

2. All documentation produced by agency staff will be legible.

3. Only blue or black ink will be used in the client record on documents produced and/or signed by agency staff.

4. All service documentation will be dated and signed with the full legal name and title of the individual providing the service. Time expended with or on behalf of the client will also be documented in the progress note in exact minutes, when applicable. Administrative duties are not billable activities (including, but not limited to, writing progress notes, leaving a phone message, faxing or mailing documents.)

5. The client’s first and last name and/or record number will be included on all documents contained in the client record.

6. When an error is made, a single straight line will be drawn through the error and the initials of the individual making the correction will be written above the error. Correction fluid and erasers may not be used.

7. The client record will not contain the names and/or identifying information of other HIV+ individuals who have not signed the Consent for Release of Information form with the agency.
8. Backup documentation is required for all services billed. Acceptable documentation is as follows:

- An agency staff signature and date on flow chart or progress note.
- Clients receiving clinical services (e.g. primary medical care, oral health care, mental health therapy, substance abuse treatment, case management, and skilled rehabilitation services) are required to either sign-in or electronically check-in when accessing services at the agency location.

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Approved by Manager
HCPH – Ryan White Grant Administration

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Date