

SCANNED DOCUMENT MANAGEMENT		
DOCUMENT NAME AND DATE OF DOCUMENT	Naming Convention for Description in SmartCare: (Type of Document - Name of Document- Date)	COMMENTS
Access and System of Care Document Types		
Access Referral	Access- Mental Health Service Request Form	
Detailed Authorization for Out of County Clients	Access- Detailed Auth for OOC	
Hospital Appointment Letters	Access- Hospital Appointment Letters	
Unable to Contact Letters	Access- Unable to Contact Letters	
Presumptive Eligibility Letters (AB 1299)	Access- PT Eligibility (AB1299)	
Service Authorization Requests (SARs)	Access- SAR (Type of SAR)	
3Ms	Assessments- 3M (Date) (Remove if this works in SmartCare)	
CalWorks Assessments	Assessments- CalWorks	
Clinical Assessment Tools	Assessment- Clinical Assessment Tools (Name of Document)	
Historical Core Assessments	Assessment-Core Assessment (Date)	
IP-CANS	Assessment- IP-CANS (Date) Used for documents prior to 7/1/23.	
KETs	Assessments- KETs (Date) (Remove if this works in SmartCare)	
Level of Intensity Screening Tool (LIST)	Assessments-LIST (Date)	
PAF	Assessments- PAFs (Date) (Remove if this works in SmartCare)	
QI Assessment for STRTPs	Assessments- QI Assessment STRTP (Date)	
Strengths Assessments and Personal Empowerment Plans	Assessments- SA (Date); Assessments- PEP (Date)	
Sacramento County ECM Comprehensive Assessment Form	Assessments- Sacramento County ECM Comprehensive Assessment Form (Date)	
Applications for SSI / Medi-Cal	Benefit Acquisition- SSI Applications/Medi-Cal	
MD SSI forms	Benefit Acquisition- MD SSI Forms	
Physician's/Medical Officer's Statement, Patient's Capacity to Manage Benefits	Benefit Acquisition- Physician's/Medical Officer's Statement, Patient's Capacity	Patient's Capacity to Manage Benefits
Requested Information for SSI	Benefit Acquisition- Requested Info for SSI	
CFT Action Plans	CFT Info-CFT Action Plans	
CFT Minutes	CFT Info- CFT Minutes	
TDMs	CFT Info- TDMs	
Client Voter form	Client Correspondence- Voter Form	
Patient Notes and Letters	Client Correspondence- Pt. Notes and Letters	
Behavioral Contract	Plans- Behavioral Contract	Once signed by patient, this will be scanned
Client Plan (if signature was obtained later, if Avatar was offline, etc.)	Plans- Historical Client Plan (with signature)	
Discharge Plans	Plans-Discharge Plans/Summaries Paperwork	
Crisis Residential Weekly Updates	Plans- Crisis Residential Weekly Updates	
Inpatient Program Schedule	Plans- Inpatient Program Schedule	
ISU Team Discharge Instructions for Minors	Plans- ISU Team Discharge Instructions for Minors	
Mental Health Wellness Plan	Plans- Mental Health Wellness Plan	
MHSA Client Housing Plan	Plans- Historical MHSA Client Housing Plan	
Safety Plans	Plans- Safety Plans	
Access Forms, Faxes and Correspondence	Collateral Documents- Access Forms, Faxes and Correspondence	
Approval of Prescription Drug Coverage	Collateral Documents- Approval of Prescription Drug Coverage	
Assessments/Evaluations from State Hospitals	Collateral Documents- Assessments/Evaluations from State Hospitals	
AWOL Report	Collateral Documents- AWOL Report	
CRP Extension Requests (past 30 days)	Collateral Documents- CRP Extension Requests (past 30 days)	
Group sign off document	Collateral Documents- Group Attendance Sheet (Name of Group/Date/Time)	
Leave of Absence	Collateral Documents- Leave of Absence	
LOCUS' Completed by other agencies	Collateral Documents- Historical LOCUS' Completed by other agencies	
LOCUS Hospital Packets at time of linkage	Collateral Documents- Historical LOCUS Hospital Packets at time of linkage	
PCP Records	Collateral Documents- PCP Records (Date)	

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Progress Notes and discharge summaries from other agencies (Not Hospitals)	Collateral Documents- Progress Notes, D/C summaries from other agencies	Does not include inpatient/hospital documents
Quarterly Report to CPS	Collateral Documents- Quarterly Report to CPS	
Service Requests/FAST Referral and collateral documents	Collateral Documents- Historical Service Requests/FAST Referral and collateral documents	
5150	Court/ Legal- 5150	
1570 Form for Commitment to State Hospital	Court/ Legal- 1570 Form for Commitment to State Hospital	
5150 Involuntary Patient Advisement	Court/ Legal- 5150 Involuntary Patient Advisement	
5250 – Notice of Additional 14-day Certification	Court/ Legal- 5250 – Notice of Additional 14-day Certification	
5250 Certification Review Hearing – Record and Decision (yellow sheet)	Court/ Legal- 5250 Certification Review Hearing – Record and Decision (yellow sheet)	
5270 Certification Review Hearing – Record and Decision (yellow sheet)	Court/ Legal- 5270 Certification Review Hearing – Record and Decision (yellow sheet)	
5270 Notice of Additional 30-day Certification	Court/ Legal-5270 Notice of Additional 30-day Certification	
Advance Medical Directive	Court/ Legal- Advance Medical Directive	
Affidavit of Identity for U.S. Citizen or National	Court/ Legal- Affidavit of Identity for U.S. Citizen or National	Will be named 1570 for NSH (Napa State Hospital), PSH (Patton State Hospital), etc.
Clinician's Affidavit for Suicidal Patient	Court/ Legal- Clinician's Affidavit for Suicidal Patient	
Conservatorship papers in chronological order (TCON Referral from MHTC) (TCON Granted from court)	Court/ Legal- Conservatorship papers (MHTC) (TCON Granted from court)	In chronological order. TCON Referral from MHTC.
Court Document Appointing guardianship of a minor	Court/ Legal- Court Document Appointing guardianship of a minor	
Court Orders	Court/Legal-Court Order	
Court-Related Documentation that is attached to a Service Request	Court/Legal-Court Related Document (Name of Document)	
Family Court Documents (Custody, Visitation, Etc.)	Court/ Legal- Family Court Documents (Custody, Visitation, Etc.)	
Guardianship Documents	Court/ Legal- Guardianship Documents	
Mental Health Court Documents	Court/ Legal- Mental Health Court Documents	
Mental Health Facilities Report of Firearms Prohibition – DOJ form	Court/ Legal- Mental Health Facilities Report of Firearms Prohibition – DOJ form	
Notice of Adverse Benefit Determination (NOABD)	Court/ Legal- NOABD (Type) Date	
Notice of Certification Hearing (to Patient - 5250,5270,etc.)	Court/ Legal- Notice of Certification Hearing (to Patient - 5250,5270,etc.)	
Notice of Intent to Request Conservatorship (NOI)	Court/ Legal- Notice of Intent to Request Conservatorship (NOI)	
Order for Post certification Treatment of Imminently Dangerous Person - Hearing Results	Court/ Legal- Order for Post certification Treatment of Imminently Dangerous Person - Results	
Patient Notification of Firearms Prohibition and Right to Hearing	Court/ Legal- Patient Notification of Firearms Prohibition and Right to Hearing	
Petition for Post certification Treatment of a Dangerous Person	Court/ Legal- Petition for Post certification Treatment of a Dangerous Person	
Physician's Affidavit for a Dangerous Patient	Court/ Legal- Physician's Affidavit for a Dangerous Patient	
Physician's Affidavit for Suicidal Patient	Court/ Legal- Physician's Affidavit for Suicidal Patient	
Proof of Service -Physician's Affidavit for a Dangerous Patient	Court/ Legal- Proof of Service -Physician's Affidavit for a Dangerous Patient	
Request For Hearing For Relief From Firearms Prohibition	Court/ Legal-Request For Hearing For Relief From Firearms Prohibition	
Subpoenas	Court/ Legal- Subpoenas	
Tarasoff	Court/ Legal-Tarasoff	
Voluntary Consent for Treatment/List of Patients Rights	Court/ Legal- Voluntary Consent for Treatment/List of Patients Rights	
1370 (Restoration of Competency-Misdemeanor)	Court/Legal Sensitive- 1370 (Restoration of Competency-Misdemeanor)	
Commitment Order for 1370	Court/Legal Sensitive- Commitment Order for 1370	
Conservator Request for transport form	Court/Legal Sensitive- Conservator Request for transport form	
CPS Reports (Juris, Dispo, Status Review, Etc.)	Court/Legal Sensitive- CPS Reports (Juris, Dispo, Status Review, Etc.)	
ECT	Court/Legal Sensitive- ECT	
Health and Education Passport (HEP)	Court/Legal Sensitive- Health and Education Passport (HEP)	
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- Law Enforcement Reports (Patient/staff report on another patient)	
M.D. Letter to Court re: 1370s	Court/Legal Sensitive- M.D. Letter to Court re: 1370s	
Public Guardian's Letter of High Risk to Provider	Court/Legal Sensitive- Public Guardian's Letter of High Risk to Provider	
Riese - (Medical Capacity Hearing)	Court/Legal Sensitive- Riese - (Medical Capacity Hearing)	
Sex Offender Address Update (to Sheriff or other LE)	Court/Legal Sensitive- Sex Offender Address Update (to Sheriff or other LE)	
Superior Court -Index Search System Results	Court/Legal Sensitive- Superior Court -Index Search System Results	ISU intake gets copy from Facility Liaison. ISU can scan upon admit of 1370.
Writs	Court/Legal Sensitive- Writs	

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504 Plans	Education/Employment- 504 Plans	
Avatar Vocational Assessment	Education/Employment- Vocational Assessment	
Behavior Support Plans	Education/Employment- Behavior Support Plans	
DOR Psychiatric Summary (signed by a licensed staff)	Education/Employment- DOR Psychiatric Summary (signed by a licensed staff)	
DOR/Crossroads Papers	Education/Employment- DOR/Crossroads Papers	
EC Prescription Referral Form	Education/Employment- EC Prescription Referral Form	
EC Release of Information	Education/Employment- EC Release of Information	
IEP (Individualized Education Plan)	Education/Employment- IEP (Individualized Education Plan)	
School Records (Report Cards, etc.)	Education/Employment- School Records (Report Cards, etc.)	
SSTs	Education/Employment- SSTs	
Agreement to Pay (ATP) – white copy (Historical Document Replaced with FIF in 2016)	Financial Eligibility- Agreement to Pay (ATP) (Historical Document Replaced with FIF in 2016)	
Correspondence from Social Security (i.e. change of payor/payee)	Financial Eligibility- Correspondence from Social Security (i.e. change of payor/payee)	
Insurance Face sheet	Financial Eligibility- Insurance Face sheet	
Medical Screen from the Meds System	Financial Eligibility- Medical Screen from the Meds System	
VA Contact Sheet	Financial Eligibility- VA Contact Sheet	
Advanced Beneficiary Notice (ABN)	Financial Eligibility- Advanced Beneficiary Notice (ABN)	
UMDAP	Financials- UMDAP	
Financial Information Form (FIF)	Financials- Financial Information Form (FIF)	
Acknowledgement of Receipt	HIPAA- Acknowledgement of Receipt	
Accounting Of Disclosures	HIPAA- Accounting Of Disclosures	
Client Request for Access to Health Record and M.D. Approval form	HIPAA- Client Request for Access to Health Record and M.D. Approval form	
Notice of Privacy Practices	HIPAA- Notice of Privacy Practices	
Privacy Policies by Year	HIPAA- Privacy Policies by Year	
Request to Amend Records and Approved or Denied Response Forms	HIPAA- Request to Amend Records and Approved or Denied Response Forms	
All Historical Documents Prior to Avatar	Historical Chart Documents- Historical Documents prior to SmartCare	Please label the Clinical Introductory Note and the Initial Psychiatric Assessment
Client Merge Notification	Historical Chart Documents- Client Merge Notification (Avatar)	
Chronic Homelessness Verification Form	Homeless Doc-Chronic Homeless Verification Form (Date)	
Disability Certification	Homeless Doc-Disability Certification (Date)	
Proof of Income (No Income, Public Assistance, SSI Award Letter, Employment)	Homeless Doc-Proof of Income Paperwork (Date)	
Rent Assistance Calculator	Homeless Doc- Rent Assistance Calculator (Date)	
Service Animal/Companion Animal Certification	Homeless Doc-Service Animal Document (Date)	
Third Party Homeless Verification	Homeless Doc-3rd Party Homeless Verficiation (Date)	
Hospital Discharge Paperwork (including Psychiatric hospitals)	Hospital Discharge Paperwork (Date)	
Identification card	ID/Insurance Cards-ID Card (Date)	
Insurance Card (e.g., Medi-Cal, Medi-Care, Insurance card photocopies)	ID/Insurance Cards-Insurance Card and photocopies (Date)	
Miscellaneous card (i.e., UCDMC card)	ID/Insurance Cards-(Name of Card) (Date)	
Medical Records Requests	Incoming Correspondence-Medical Requests Request (Date)	
Concurrent Review Documents	Inpatient- Concurrent Review Docs	
Inpatient UR Tool	Inpatient- UR Tool	
TAR	Inpatient-TAR	
Ambulance packet	Intake Paperwork-Ambulance packet (Date)	
ISU Nurse to Nurse Patient Final Arrival Screening	Intake Paperwork-ISU Nurse Arrival Packet/Screening (Date)	
JV 583 Form	Intake Paperwork-JV 583 from (Date)	

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Reception Patient Worksheet	Intake Paperwork-Reception Patient Worksheet (Date)	
Referral Packets - clients accepted	Intake Paperwork-Referral Packets (Date)	ISU: Should be included in Intake packet
TFC Referral Form & Screening Tool	Intake Paperwork-TFC Referrel & Screening Tool Document (Date)	TFC Referral Form & Screening Tool into TFC Episode
VA contact sheet	Intake Paperwork-VA Contact Sheet (Date)	(Admitted MHTC, Crestwood Intake Scans)
EKG Results	Labs-EKG Results (Date)	
Laboratory Results	Lab Results (Date)	
PPD Results letter	Labs-PPD Results (Date)	
Pregnancy Tests	Labs-Pregnancy Test Results (Date)	
TB test results	Labs-TB Test Results (Date)	
X-Ray Results	Labs-X-Ray Results (Date)	
CURES	Medication Consent-Cures	
Informed Consent for Treatment with Psychotropic Drugs	Medication Consent-Informed Consent-Psychotropic Drugs (Date)	
JV220 Documents	Medication Consent-JV220 Documents (Date)	
Client Prescription Refill Request	Medication Service Note-Prescripion Refill (Date)	
Medical Practitioner (MD, PA, etc) notes	Medication Service Note--Medical Notes	
Prescriptions	Medication Service Note--Perscriptions (Date)	
Psychiatric Referrals	Medication Service Note--Psychatiric Referrals (Date)	
Client Merge Notification	MHTC Alert-Client Merge Noticiation	MHTC Only
Missing Persons Form	MHTC Alert--Missing Persons Form (Date)	MHTC Only
Provider Behavioral Plans/ISU MD Letter to ERs	MHTC Alert-Provider Behavioral Plans & ISU MD Letter (Date)	MHTC Only
Red Alert Sheets	MHTC Alert-Red Alert Sheets	MHTC Only
Tarasoff Forms	MHTC Alert-Tarasoff Documents (Date)	MHTC Only
Termination of Conservatorship (if client is not inpatient at the time)	MHTC Alert-Termination of Conservatorship (Date)	MHTC Only
Interview Summary from Crisis Residential	MHTC CR-Interview Summary of Crisis Residential (Date)	
Denial of Rights Documentation Record- 15 min. Pink sheet	MHTC Denial-Deniel Rights Packet (Date)	MHTC - (pink sheet)
Seclusion or Restraint Patient Debriefing	MHTC Denial-Seclusion or Restraint Patient Debriefing (Date)	
MHTC Accounting of Disclosures	MHTC HIPAA-MHTC Accounting of Disclosures (Date)	MHTC Only
MARs (Treatment/Standing and PRN)	MHTC-MARS (Date)	Title type of MAR separately (TX,PRN/Standing) and put date range
All Physician Orders	MHTC-Physican Orders (Date)	Scan all MD orders as one document and title with date range
Law Enforcement / MCST FAST Form	MHTC-Law Enforcement/MCST FAST Form (Date)	
MHTC Referral Packets - clients NOT accepted	MHTC-Referral Packets (Date)	
MHTC Subpoenas	MHTC-Subpoenas	If no ROI be sure to record release of records to County Council on Accounting of Disclosures
Consent for HIV Testing	Non-Medication Consent-Consent for HIV Testing (Date)	
Consent to Photograph	Non-Medication Consent-Consent to Photography (Date)	
Consent to treat (MERT)	Non-Medication Consent-Consent to Treat (MERT) (Date)	
Consent to Treat (Other)	Non-Medication Consent-Consent to Treat (other) (Date)	
Individual Consent	Non-Medication Consent-Individual Consent (Date)	
Informed Consent to Treat	Non-Medication Consent-Informed Consent to Treatment (Date)	

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JCE 366	Non-Medication Consent-JCE 366 (Date)	
Minor Consent Form	Non-Medication Consent-Minor Consent (Date)	
Telehealth Consent	Non-Medication Consent-Telehealth Consent (Date)	
Telepsychiatry Consent	Non-Medication Consent-Telepsychiatry Consent (Date)	
Therapy Consent	Non-Medication Consent-Therapy Consent (Date)	
Billing/Response letters to billers	Outgoing Correspondence-Billing/Response Letters (Date)	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-Letter from MHTC MD (Date)	
Med lists sent to PCP or another provider	Outgoing Correspondence-Med lists sent to PCP (Date)	
Property Reports / signed	Patient Property-Property Reports	
Property Request Forms	Patient Property-Property Requests	
		Providers with their own EHR will upload documentation supporting medical necessity for children/youth presumptively transferred to Sacramento
Client Plans	Providers with their own EHR-Client Plans (Date)	
Core Assessments	Providers with their own EHR-Core Assessment (Date)	
Initial Psychiatric Assessments	Providers with their own EHR-Initial Psychiatric Assessments (Date)	
Medication Service Plans	Providers with their own EHR-Medication Service Plans (Date)	
TBS Adjunct Client Plan	Providers with their own EHR-TBS Adjunct Client Plan (Date)	
Intensive Services Referral (LOCUS)	Referrals for Other Services-Intensive Services (LOCUS)	
MHTC Medical Consultation Request and documentation back from ED or outpatient appointment	Referrals for Other Services-MHTC Medical Consultation Request (Date)	Stamp individual RX as scanned and place in hard chart on unit
RX from other agencies (i.e. RX from Med Clearance)	Referrals for Other Services-Rx-other agencies (Date)	
DHCS Transition of Care Tool	Referrals for Other Services-Transition of Care Tool (Date)	
Access Team or SOC ROI	ROI-Access Team/SOC (Date)	
Any ROI	ROI-Name of ROI Entity (Date)	
Family Notification	ROI-Family Notification (Date)	
MDT ROI	ROI-MDT	
ISU Patient Tuberculosis and Heath Questionnaire	Screening-ISU Patient Tuberculosis and Heath Questionnaire (Date)	
Sleep Log	Sleep Log	
System of Care Authorization	SOC- Authorization for Services	
SOC Referral	SOC- SUPT Service Request Form	
CIWA (Alcohol Assessment by M.D.)	SUPT -CIWA/COWS (Date)	
Medical clearance or Physician letters	SUPT- Physicals from MDs	
Photographs (i.e. injuries, etc.)	Termination/Exit Documents-Photographs	
Psychiatric Tests	Testing/Evaluation-Psychiatric Test (Date)	
Psychological Assessment Summary	Testing/Evaluation-Psychological Assessment Summary (Date)	
Psychological Tests	Testing/Evaluation-Psychological Test (Date)	