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Important Reminder

DMH Directly-Operated programs may only use DMH Official Forms. Once DMH implements its electronic record, only data elements on DMH Official Forms will be considered for incorporation into the electronic record. For this reason, it is even more important to ensure your programs is using DMH Official Forms (as identified by the MH# in the top left corner of the form). If your program is using a form without an MH #, please contact a Clinical Records Staff to begin the process of making the form official.

## FORMS USAGE CHART

### NEW CHART AVAILABLE ON INTERNET

([http://dmh.lacounty.gov/ToolsForClinicians/clinical\\_forms.html](http://dmh.lacounty.gov/ToolsForClinicians/clinical_forms.html) - CHART)

As programs become more "all inclusive" and forms become more standardized, it is more and more important to focus on the purpose behind the contact with the client and not the clinical form being used. For this reason, the attached Forms' Usage Chart has been developed to assist staff in recognizing the differences between different key forms that are used for initial contacts with clients. The forms identified on the chart include:

- COS
- Triage
- Short Assessment
- Initial Assessment

The Chart identifies the following usage elements for each of these forms:

- Purpose** identifies the purpose of the form and what the use of the form is
- Focus** identifies what the key focus of the contact with the client is when using the form
- Episode** identifies whether or not an episode is opened as a result of using the form
- Diagnosis** identifies whether or not a diagnosis is given to the individual as a result of using the form
- Service Types** identifies the types of services that might be are provided to the client during the contact or after the form has been completed
- Length of Services** identifies the length of services that will be provided to the client as a result of completing the form

It is hoped that the use of this chart will assist staff in determining which form should be used in a variety of initial client contact situations. It is also hoped that the use of this chart will assist staff in differentiating between these different types of contacts with clients. Staff should first ask themselves what the purpose of the contact with the individual is and then decide on which form to use to document the information gleaned from the contact and ensure they gathered the appropriate information to satisfy the purpose of the contact. The different initial contact scenarios require a different skill set of clinical staff.

### DID YOU KNOW...

Staff signatures must include discipline or job title? If staff hold a State recognized discipline (such as LCSW, MFTI, MD) then they should always identify their discipline after their signature. If staff do not hold a State recognized discipline, then they should always identify their job title after their signature.



## Clinical Form Usage for Initial Contacts with Individuals/Clients Quality Assurance Division – 04/11/11

	COS FORMS	TRIAGE FORMS	SHORT ASSESSMENT FORMS	INITIAL ASSESSMENT FORMS
PURPOSE	To promote and engage individuals in Mental Health services	To determine urgency and priority of being seen	To determine diagnosis, needs, and appropriate referrals.	To gather a complete psychosocial history to diagnosis and determine appropriate interventions
FOCUS	Education, engagement, outreach	Risk Factors, Safety, Urgency of being seen	Needs, Impairments, symptoms	Comprehensive understanding of symptoms and their link to impairments
EPISODE	No Episode Opened	No Episode Opened	Episode Opened (may close in the same day)	Episode Opened
DIAGNOSIS	Client does not receive a Diagnosis as a result of this contact	Client does not receive a Diagnosis as a result of this contact	Client is evaluated and receives a diagnosis as a result of this contact	Client is evaluated and receives a diagnosis as a result of this contact
SERVICE TYPES	No Direct Services COS Services	No Direct Services COS or MAA Services	Linkage/Referral; Immediate response to needs	Treatment Services
LENGTH OF SERVICES	Contact Based	Contact Based	Up to 2 Months	Ongoing