

<b>WCHO</b>		<b><i>Policy and Procedure</i></b>	
Department	# of Pages: 2		
Policy Name: Clinical Records	Type of Policy: <input checked="" type="checkbox"/> WCHO <input type="checkbox"/> Regional <input type="checkbox"/> Network		
Policy Number 13.004	Effective Date	Revision Date	Approval Date
<b>Administrative/Board of Directors Sign Off</b>			
Administrative Signature:		Date:	
Board of Directors Signature:		Date:	

**I. PURPOSE**

To ensure consistency across network providers in meeting the minimum documentation standards through the clinical record structure.

**II. APPLICATION**

All WCHO Network Providers

**III. DEFINITIONS**

The structure must contain at a minimum:

- Assessment
  - Financial status
  - Legal Information
  - Appropriate Release of Information
  - Person Centered Plan /Treatment Plan
  - Documentation of activities/interventions conducted with the client
  - Progress toward meeting treatment goals
  - Historical and Ongoing information related to the client’s physical and behavioral health status and needs.
  - Documentation of how services are integrated across the continuum of care based upon identified need in the PCP/Treatment plan:
- Physical Health
  - Community
  - Education
  - Vocational
  - Spiritual
  - Family/Significant Other Support System
  - Socio-cultural
  - Special Population Needs

## Discharge Planning

### IV. POLICY

All Network Providers shall have a defined clinical record structure that is applied to each clinical record and is in accordance with standards set forth by their selected accrediting body.

### V. EXHIBITS

None

### VII. REFERENCES

WCHO Contract Monitoring Policy  
WCHO Assessment Policy

### V. PROCEDURES

<u>WHO</u>	<u>DOES WHAT</u>
Network Provider	Defines clinical record structure and maintains clinical records. Monitors appropriate documentation of clinical content, timeliness, medical necessity, etc. (minimally 30% of all records annually) through a pre-defined process. Must be able to submit results of monitoring when requested. Establishes a mechanism for improving problems noted in the clinical record.
WCHO Provider Relations Unit	Audits selected records upon routine site visits against the providers' established policy.