

Document Name/type: <i>updated 6/4/20</i>	Category
1500 HICFA (Health Insurance Claim Form)	Do not scan - send to finance
Acknowledgement of Advance Directive Information	Admissions/Transfers/Discharges
Acknowledgement of Privacy Practices	Admissions/Transfers/Discharges
Admission documents	Admissions/Transfers/Discharges
Advance Directives/Do Not Resuscitate Orders	Legal Documents
Advanced Directive Acknowledgement (SCCMHA form)	Admissions/Transfers/Discharges
AFC Agreements & Assessment Plan for AFC	Other
AFC Healthcare appraisal	Other
Application for DHS services	Entitlement & Benefits
Application for Social Security	Entitlement & Benefits
Applications for services	Consult/Referral/Application
Appointment card	Other
Approval for services from other agencies	Correspondence
ASQSE	Assessments
Assessments from non-SCCMHA sources	Assessments
Assessments from school	Assessments
ATO (Hospitalization)	Legal Documents
ATP (Financial Assessment)	v-Finance will scan
Authorization to Renew Standing Orders (Quest)	Labs
Authorizations for services from insurance providers	w-send to Finance
Bayside Lodge Application	Consult/Referral/Application
Bayside Lodge Referral	Consult/Referral/Application
Bayside Monthly monitoring	Progress Notes
Bayside Plan	Attachment
Behavioral Assessment	Behavior Management
Behavioral Plan	Attachment
Behavioral Quarterly Report	Behavior Management
Benefit Exception Request	Insurance Policies
Bipolar Symptom Assessment	Assessments
Birth Certificates	Admissions/Transfers/Discharges
Budget (for Child Waiver)	Waiver Documents
Budget Report (Self-Determination)	y-send to Self-Determination Coordinator
Burial Fund Agreements	Insurance Policies
CAFAS Report	Attachment
Camper Health Form	Healthcare Integration
Care Review Form (Care Management)	z-Do not scan - return to staff
Caro Center Documents	State Facility
Casemanagement of Michigan documents	Attachment
Child & Adolescent Intake/Referral Assessment	Assessments
Child Attention Profile	Assessments
Child Protective Services documents	Legal Documents
Child Waiver Budget	Waiver Documents
Child Waiver form	Waiver Documents
Chore Provider Benefit Info	Entitlement & Benefits
Chore Services Denials	Entitlement & Benefits
Client Financial Record	Other
CLS Net Service Analysis Map	Entitlement & Benefits
COFR Authorizations	Supporting Documentation
Communications and Reports from Physicians	Healthcare Integration
Connor's Rating Scale	Assessments
Consent for Medication	Imbed-SentriConsent Form
Consults by SCCMHA case worker(s)	Consult/Referral/Application
Consumer's drawings	Attachment
CPS TDM Activity Report	Legal Documents
Crisis Follow-up Plan	Crisis/Safety Plan
Crisis Follow-up Plan (CMH)	Crisis/Safety Plan

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Crisis Referrals	Admissions/Transfers/Discharges
DCH 1181 Family Support Subsidy Program Application	Consult/Referral/Application
Department of Corrections Prisoner Information	Admissions/Transfers/Discharges
Depression Screenings	Supporting Documentation
Detention Center documents	Legal Documents
DHS 1212 Adequate Negative Action Notice	Correspondence
DHS 1605 Notice of Case Action	Insurance Policies
DHS 2355	Model Payment
DHS 3471 FIA Notification	Correspondence
DHS 3688 Shelter Verification	Other
DHS 3803	Model Payment
DHS 54-A Medical Needs (Michigan DHS)	Other
DHS 971 Permanency Planning Conference Activity Report	Correspondence
DHS application	Entitlement & Benefits
DHS Deductable Report	Entitlement & Benefits
DHS Disposition - Report of alleged Child Abuse and Neglect	Legal Documents
DHS Medical Examination Report DHS-49	Healthcare Integration
DHS Medical Needs (DHS 54-A)	Other
DHS Mental Residual Functional Capacity Assessment DHS-49-E	Healthcare Integration
DHS Psychiatric/Psychological Examination Report DHS-49-D	Healthcare Integration
DHS Spendown: Medicaid activated note (no title on document)	Entitlement & Benefits
DHS-3975 Authorization Reimbursement	Insurance Policies
DHS-49 Medical Examination Report	Healthcare Integration
DHS-49-D Psychiatric/Psychological Examination Report	Healthcare Integration
DHS-49-E Mental Residual Functional Capacity Assessment	Healthcare Integration
DHS-69 Foster Care/Juvenile Justice Structured Decision-Making Action Summary	Legal Documents
Discharge Plan from Hospital	Hospital Records
Disposition Transmittal PCPH	Correspondence
Doctor's Progress Notes (from AFC home)	Attachment
Drawings by consumers	Attachment
Driver's License (copy)	Admissions/Transfers/Discharges
DSS 3200 - Report of Actual or Suspected Child Abuse	z-Do not scan - send to Quality (Holly)
Echocardiogram Report	Healthcare Integration
Educational Assessments	Assessments
Educational Reviews	Person Centered Plans
Eligibility notification for services from other agencies	Correspondence
Family Choice Form	Admissions/Transfers/Discharges
Family Support Subsidy documents	Respite/Family Support Subsidy
Family Support Subsidy Program Application DCH 1181	Respite/Family Support Subsidy
FIA/SSA Referral Sheet	Consult/Referral/Application
FIA-68 Foster Care Structured Decision Making Permanent Ward Service Plan	Legal Documents
Financial Liability [Ability To Pay form]	v-Finance will scan
Forensic Center documents	State Facility
Foster Care Structured Decision Making Permanent Ward Service Plan FIA-68	Legal Documents
Foster Care/Juvenile Justice Structured Decision-Making Action Summary DHS-69	Legal Documents
Guardianship Papers	Attachment
Hab Waiver Forms	Waiver Documents
Hawthorne Center Documents	State Facility
Health Care Coordination Form (from other organizations)	Healthcare Integration
Health Professional Recovery Program MD-DO	Healthcare Integration
Health Professional Recovery Program Therapy	Healthcare Integration
Healthcare Appraisal - MDHS	Other
HICFA 1500 (Health Insurance Claim Form)	Do not scan - send to finance
Historical Information from other agencies	Admissions/Transfers/Discharges
HIV Assessment	Healthcare Integration
Home Health Agency Certification and Care Plan	Healthcare Integration

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Hospital Discharge Checklist	Hospital Records
Hospital Discharge Packet	Hospital Records
HPRP Quarterly Therapy Report	Healthcare Integration
IEPC	Person Centered Plans
IEPC Reports	Person Centered Plans
IEPC Reviews	Person Centered Plans
Incident Report	z-Do not scan - send to Quality (Holly)
Individual Health Consultation (from Registered Dietician)	Person Centered Plans
Initial Consent for Treatment	Consents - Treatment/Services
Insight Client Monthly Status Report	Progress Notes
Insurance card	w-send to Finance
Insurance Information	Insurance Policies
Insurance Plan (pre-paid funeral, life, other)	Insurance Policies
Juvenile Detention Center Incident Report	Other
Letters & Correspondence (unless otherwise indicated)	Correspondence
Life Choices Documentation Form	Attachment
Life Insurance documents	Insurance Policies
LOCUS Form	Attachment
MDCH Pharmacy Program Prior Authorization Request	Prescriptions for Services
Medicaid application	Entitlement & Benefits
Medicaid Deductable Report	Entitlement & Benefits
Medicaid Rx	Prescriptions for Services
Medical Test Reports	Labs
Medication Consent	Imbed-SentriConsent Form
Medication consults from outside doctors	Healthcare Integration
Medication Reviews by SCCMHA psychiatrist	Psych Evals / Med reviews
Medication sheets from outside agencies	Healthcare Integration
Mental Status Examination Form	Assessments
Model Payment Forms	Model Payment
Mt. Pleasant Center Documents	State Facility
Net Service Analysis Map	Entitlement & Benefits
Neurodevelopmental Trauma Assessments	Assessments
Neurological Reports	Healthcare Integration
New Passages Discharge/Transitional Plan	Hospital Records
Non-medical Tests, Evaluations or Assessments	Assessments
Non-medication Prescription Order	Prescriptions for Services
Notice of Case Action DHS 1605	Insurance Policies
Notice of Confidentiality	Admissions/Transfers/Discharges
Notice of Hearing	Legal Documents
Notice of Privacy Disclosure	Admissions/Transfers/Discharges
Notifications of approval or eligibility for services from other agencies	Correspondence
Nursing Notes	Progress Notes
Nutritional Assessment (from Registered Dietician)	Attachment
Order of Appointment (CASA)	Legal Documents
Orders for lab work	Attachment
Orders from CMH Psychiatrists	Attachment
Orientation form	Admissions/Transfers/Discharges
OT Clinical Review	Attachment
Other items relating to consumer's finances	Other
Other-party Information Release Requests	Imbed-Sentri Regional Release of Information
OT-PT-Speech Prescription form	Attachment
Parent Questionnaire	Healthcare Integration
Parenting Wisely Progress Note	Progress Notes
PATH Enrollment Paperwork	Other
Patient Assistance Paperwork	Healthcare Integration
PCP Signature page -consumer/guardian signature	Attachment

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Permanency Planning Conference Activity Report DHS 971	Correspondence
Permission Form For Prescribed Medication (school)	Other
Personal Care Physician Prescription copies	Healthcare Integration
Petition for Hospitalization	Legal Documents
Physical Health Care and Nutritional Screening Form	Healthcare Integration
Physical Health Care Screening	Healthcare Integration
Physicians Evaluation of Respondents Physical Condition (for court)	Legal Documents
Plan from non-SCCMHA sources (other than State Institution reports)	Person Centered Plans
Planning Tools (various types)	Attachment
PMTO Participation Consent	Consents - Treatment/Services
Power of Attorney	Legal Documents
Pre-authorizations Requests for Prescriptions	Prescriptions for Services
Pre-authorizations Requests to Insurance	Insurance Policies
Prescription and/OR Controlled Substance PRESCRIPTION	Prescriptions for Services
Prescription Assistance Plan (PAP) paperwork	Prescriptions for Services
Privacy Practices	Admissions/Transfers/Discharges
Professional Orders (from AFC home)	Healthcare Integration
Professional Treatment Monitor (from Registered Dietician)	Person Centered Plans
Progress Notes from other agency	Progress Notes
Protective Services Certificates	Legal Documents
Protective Services Release and responses	Legal Documents
Psychiatric Evaluation	Psych Evals / Med reviews
Psychological evaluations	Assessments
Referral Form for Dialectic Behavior Therapy	z-Do not scan - return to staff
Refill requests from pharmacy	Prescriptions for Services
Reimbursement Authorization DHS-3975	Insurance Policies
Release of Information request/consent	Imbed-Sentri Regional Release of Information
Rental Agreements	Other
Report of Acutal or Suspected Child Abuse or Neglect (DHS-3200)	z-Do not scan - send to Quality (Holly)
Request/Approval of Exception Payments	Other
Respite Care Emergency Medical and Advanced Directive Proc	Respite/Family Support Subsidy
Respite Care Medication Procedures	Respite/Family Support Subsidy
Respite Level of Care	Respite/Family Support Subsidy
Respite Plan	Person Centered Plans
Saginaw Collaborative Release	Attachment
Saginaw Meadows Discharge/Transitional Plan	Hospital Records
School Report - Psychoeducational Report	Assessments
Self-Determination documents	y-send to Self-Determination Coordinator
Shelter Verification DHS 3688	Other
Signed receipt of recipient rights material	Admissions/Transfers/Discharges
Social Security application	Entitlement & Benefits
Social Security Card (copy)	Admissions/Transfers/Discharges
Special Needs Vision Assessment	Assessments
Speech & Language Report from school	Assessments
Spend Down Report	Entitlement & Benefits
SSA Medical Source Statement (Mental)	Correspondence
SSA Notice of Decision	Correspondence
SSA Paralegal Analysis Letter	Correspondence
SSA Physician/Medical Officer's Statement SSA-787	Correspondence
SSA-787 Physician/Medical	Correspondence
STARS Application for Half-Fare, Fixed Route Bus Service	Consult/Referral/Application
Subpoenas (for Release of Information)	Imbed-Sentri Regional Release of Information
Subpoenas (not for Release of Information)	Legal Documents
Support Intensity Scale Declination	Assessments
SVRC Discharge	Other
SVRC IPS Progress Report	Person Centered Plans

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SVRC Plan	Attachment
Taxi Cab Vouchers	Other
TB Test Results	Labs
TDM Activity Report	Legal Documents
Team Decision Making Activity Report - Child Protective Services (CPS)	Legal Documents
Training Verification	Person Centered Plans
Trauma Screens	Supporting Documentation
Treatment Plan (from Registered Dietician)	Person Centered Plans
Treatment Monitoring	Person Centered Plans
Universal Acknowledgement & Consent	Consents - Treatment/Services
Will	Legal Documents
Youth Health Record Yearly Dental	Healthcare Integration

Attach	Corresponding E-Document
x	Medical Chart Order
x	IPOS Planning Meeting
x	IPOS Planning Meeting
x	CAFAS
x	IPOS Planning Meeting
x	IPOS Planning Meeting
x	Psych Evals / Med reviews
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Attach	Corresponding E-Document
x	IPOS Planning Meeting
x	Initial or Psychosocial Assessment