## ENKI HEALTH & RESEARCH SYSTEMS, INC. TIER ANNUAL TRACKING LOG

Confidential Patient Information See California Welfare Institution Code Section 5328

Client's Name:		IS Number:			
Mental Health Worker:		Clinician:			
Date completed by primary staff: Supervisor's Final Review Date:					
(Initial if completed, indications of the complete of the comp				if not app	olicable)
Annual – Clinical Items  DUE DATE:  (1 <sup>st</sup> of the month)		Staff	Sup	Admin. Svcs.	
oc: nts	Adult Attendance Contract (18+)				
Add. Doc: Consents	Parent/Guardian Responsibility Contract (0-17)				
	Consent to Release Information (can be created in multip	le places within Tier) (if applicable)			
MTP	Update to Master Treatment Plan				
	MD signature on Master Treatment Plan for <b>Medicare</b>	clients (if applicable)			
	Progress/Outcomes on prior MTP/CCCP objectives				
Assess- ments	Life Skills Assessment				
	Schedule 3-year Clinical Re-Assessment (if applicable)	Appt. date:			
SS	Progress Note – Justification of Medical / Service nece	ssity <b>Dated</b> :			
Progress Note	Progress Note – Completion of the Treatment Plan with				
as Med./Svc. Necessity)  Dated:					
Annual – Administrative Items		Staff	Sup	Admin. Svcs.	
	Generate & forward the Medications Services Tracking	Log (if applicable)			
Scan: H & L	Minute Order that specifies MHS (if applicable)				
Scan: Admin. & Consent	Caregiver's Authorization Affidavit (if applicable)				
🗖	Mini Mental State Exam (MMSE) (Required for all Olde	er Adult clients, age 60+)			
Scan: Clinical	Montreal Cognitive Assessment (MoCA) (if app., for Older Adult clients age 60+)				
*,0	IS Screens - 1. "Other" - SFPR; 3. "Open", 4. "Closed"				
	Outcome Measures for Adults completed (check, if app	<i>Dlicable)</i> Anxiety – GAD-7			
es		Depression – PHQ-9			
asur	FSP – FSP OMA				
e Me					
Scan: Outcome Measures	Outcome Measures for Youth completed (check, if applicable				
on ::		Anxiety – YOQ & RCADS			
Scar		Depression – YOQ & PHQ-9 Disruptive Bx. – YOQ & ECBI			
	☐ Seeking Safety – OQ & UCLA PTSD Index ☐ MAP 1	rauma – YOQ & UCLA PTSD Index			
	☐ TF-CBT – OQ, UCLA PTSD Index ☐ 0-5 cli	ents - PEDS & ASQ (if indicated by PEDS)			
Clients who turns 18 during treatment or when guardianship changes  DATE completed:			Staff	Sup	Admin. Svcs.
٠.	Consent for Services				
Doc	Adult Attendance Contract (for those who turn 18)				
Add. Doc.: Consents	Parent/Guardian Responsibility Contract (for guardians				
1	Consent to Release Information (can be created in multiple places within Tier) (if applicable)				

## **ENKI HEALTH & RESEACH SYSTEMS, INC.**

## PROCEDURE:

- 1. The designated staff/primary contact will initiate the TIER Coordinated Services Tracking log and complete the items indicated for the annual review.
- 2. The TIER Coordinated Services Tracking log is to be submitted to Medical Records.
- 3. Administrative Services will notify the supervisor that they have a tracking log to review. (Please note: Per the needs of the clinic, communication can be via email <u>or</u> copies of the tracking logs forwarded to the Unit Supervisor.)
- 4. The supervisor will complete a <u>qualitative</u> review of all the items on the tracking log they are responsible for, initial the <u>original</u> log for each item and provide signatures where applicable. Any needed additions/corrections will be returned to the designated staff/primary contact.
- 5. Upon completing the review, the supervisor will indicate the "Supervisor's Final Review Date" and return the tracking log to Medical Records with the <u>original</u> tracking log.
- 6. Administrative Services will do a <u>quantitative</u> review of the chart for completion/incompletion of the items on the tracking log they are responsible for and initial the log for each item. Any needed additions/corrections will be returned to the designated staff.
- 7. Administrative Services will finalize the process, enter all necessary data into TIER, scan the finalized documents into TIER, and stamp the log.
- 8. Filing Procedures: The original TIER Annual Tracking Log will be kept in a binder by month in Medical Records for a period of 13 months.
  - Only one binder should be created for all completed tracking logs.