

SUBJECT: CHARTING INSTRUCTIONS

EFFECTIVE  
DATE: 02-15-10 (replaces 12-03-07)

APPROVED BY:

Reviewed (no changes): \_\_\_\_\_  
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Executive Director

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POLICY

It is the policy of McIntosh Trail CSB to provide accurate information regarding the consumer, including observations made in counseling sessions and telephone contacts.

PROCEDURE

All staff will observe the following instructions when making entries into consumer records:

1. All chart entries will be entered utilizing software approved by the organization for documenting consumer Protected Health Information (PHI). In situations where access to a computer or the approved software is not available, all data shall be legibly hand printed. Clinical supervisors will establish a schedule (not to exceed quarterly) to periodically review charting appropriateness and legibility of their staff who create documentation for entry into the consumer's chart. All documentation created for chart entry will be filed in a timely manner as stated in Policy No. 1116.
2. Consumer name and/or C.I.D. number are on each page and if a service is provided to consumer, it will include HIPAA code, unit(s), date of service.
3. Corrections/revisions - a single line is used to strike an entry, mark "error", initial, date (erasure, unreadable crossouts, and white out are not allowed).
4. Ink - black or blue (pencil not allowed).
5. All entries shall possess a date of service and handwritten date of signature. The entry shall conclude with the author's printed/stamped name and signature with credentials/title. If administering medication, FIRST NAME, LAST NAME, initials for title). If a service is provided to consumer, it will include HIPAA code, unit(s), date of service.
6. Symbols/abbreviations from Dangerous Abbreviations, Acronyms and Symbols **Not To Be Used** (see Policy 1108).
7. All forms to be filled out completely, reasons for exceptions to be documented.
8. FLAGGING ALLERGIES:  
All known drug allergies will be recorded on the Medication/Prescription Record form and in the Biopsychosocial Assessment. All allergies will be "flagged" by underscoring them in **RED**.

The outside cover of the clinical record has a designated space to identify all known drug allergies. This information is to be updated annually or at anytime it is discovered that a consumer has developed a new allergy.

9. The designated space on the outside cover of the clinical record will identify the presence of an "Advance Directive".

Reference: JCO IM