

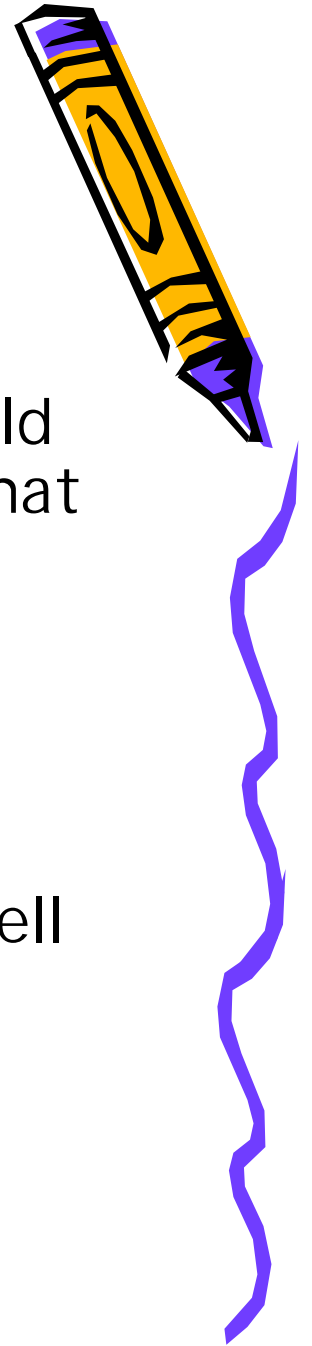


Indicator #18: Have you been well trained in paperwork requirements for the program and do your records clearly reflect delineated policies and procedures?



Background

- Expanded school mental health programs should have a clear and defined paperwork process that is consistent with clinical, legal, financial, institutional, and accrediting/oversite organization regulations.
- A user-friendly document or training manual should be available for clinicians during orientation and on an ongoing basis that has well defined policy and procedures related to paperwork.



Background

- Paperwork is not fun, but is a necessity.
- Why document?
 - It is the law and is part of professional codes in fields such as psychology, counseling, and social work.
 - It is a reference to use to improve treatment and assist in supervision.
 - It documents service utilization and impact of services.
 - It encourages clinicians to define goals and objectives with clients.
 - It serves as a record in case of legal and ethical proceedings.
 - It provides records for verification of the delivery of and the content of services for funders and oversight entities.
 - It offers records that can be accessed at a later date by other health and mental health professionals to inform ongoing care.



Background

- Clinicians should have adequate time to complete paperwork and receive periodic trainings to update them on changes in documentation requirements.
- A good approach is for program administrators to work to streamline paperwork demands and strategize with clinicians on how to effectively and efficiently meet documentation requirements.
- Program administrators should have a process to update staff on documentation, policy, and procedure changes.



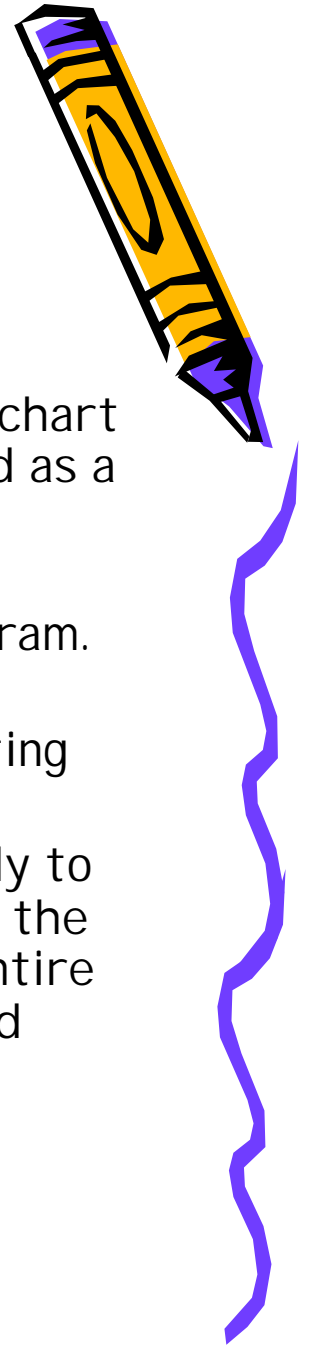
Menu of Suggested Activities

- Create a helpful hint sheet that describes how to complete each of your program's forms.
- Create a flowchart that follows the necessary paperwork path for each case (from initial referral to termination).
- Improve or create a training for clinicians to understand the paperwork process.
- Create a peer-review process to review whether clinicians are following delineated policies and procedures in their paperwork.
- Use the group meeting time to process and review delineated policies and procedures related to paperwork and to consider how this translates to individual records. Consider areas of needed improvement.



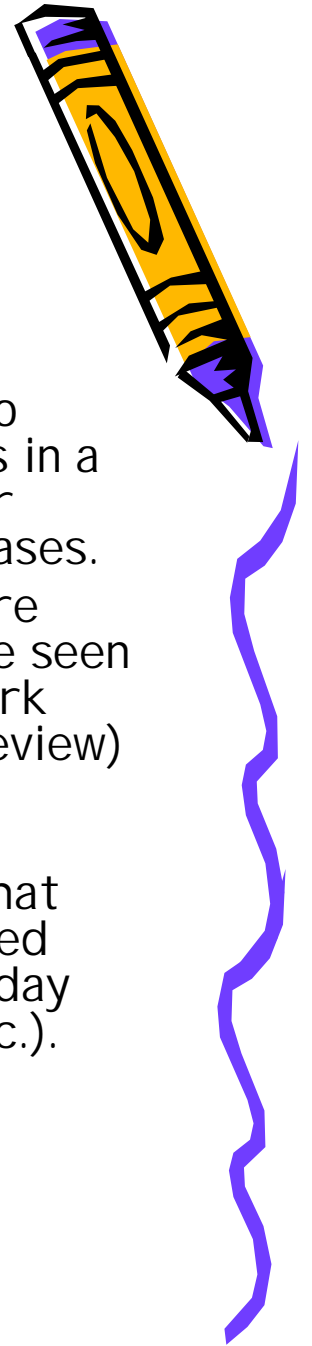
Helpful Hints

- Work with your administrative team to create a model chart that has examples of completed forms that can be used as a reference.
- Create a document that summarizes frequently asked questions and errors in documentation within your program.
- Use a supervision group meeting to outline required paperwork and create a helpful hints sheet for completing each form that can be used in future training.
- Administrative staff should audit records on a quarterly to bi-annual basis and should provide specific feedback to the individual clinician as well as general feedback to the entire clinical staff about common problems in the records and relevant strategies to overcome them.



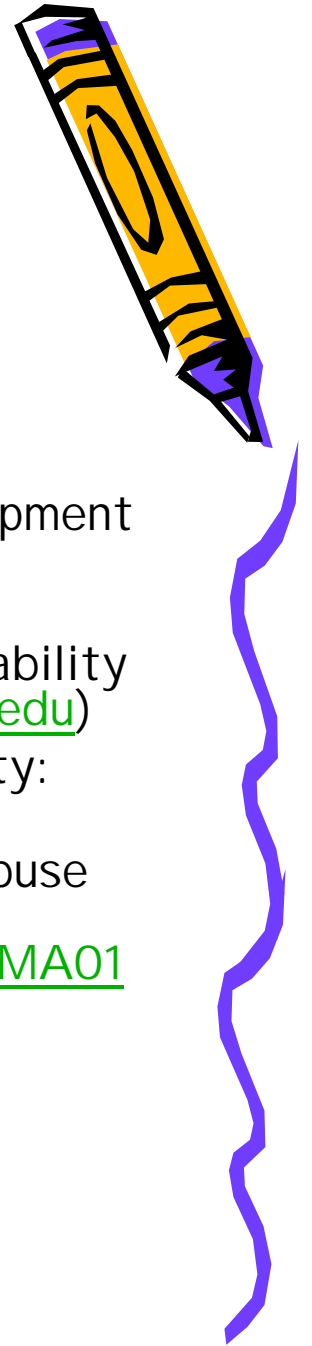
Helpful Hints

- Consider using undergraduate and graduate externs to assist clinicians with some of the prevention activities in a school. This may free up some clinician time to better meet the paperwork demands of the more intensive cases.
- Arrange for a paperwork party on a day when there are testing or other activities in which students cannot be seen for services. Arrange for clinicians to periodically work with one another to review each others cases (peer review) to consider if documentation is consistent across the program and if it is meeting regulations.
- Arrange a paperwork review training day with staff that summarizes documentation requirements and delineated policies and procedures. Try to add some fun to this day by being playful and creative (paperwork jeopardy, etc.).



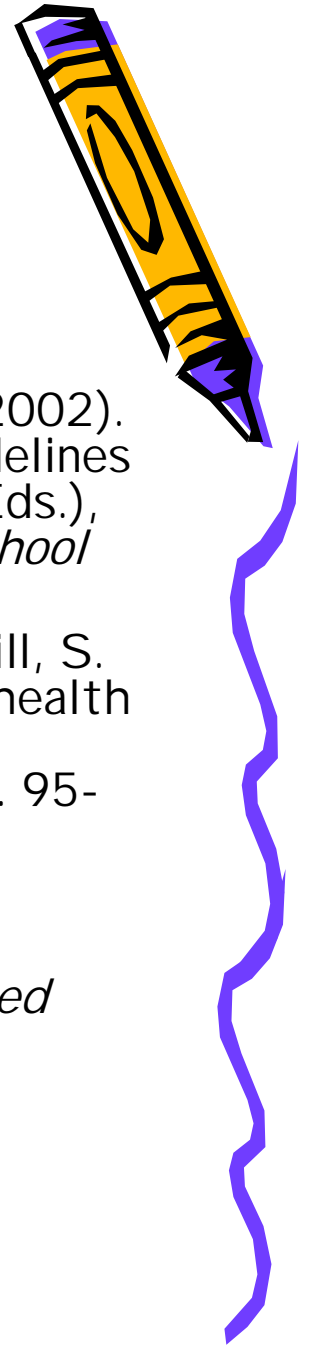
Web Resources

- American Psychological Association
(<http://www.apa.org/practice/recordkeeping.html>)
- Center for School Mental Health Assistance, Program Development Resource Guide (2003)
(<http://csmha.umaryland.edu/how/respackets.html>)
- Center for Mental Health in Schools, Evaluation and Accountability Related to Mental Health in Schools (<http://smhp.psych.ucla.edu>)
- Center for Mental Health in Schools, Evaluation Accountability: Getting Credit for All You Do (<http://smhp.psych.ucla.edu>)
- US Department of Health and Human Services, Substance Abuse and Mental Health Services Administration,
(<http://www.mentalhealth.samhsa.gov/publications/allpubs/SMA01-3537/chapter3.asp>)



Background References

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