OPTUM®

QI CORNER

Best Practices Series

In this issue:

- Intake paperwork
- Informed consent

To help ensure your success with following County, State, and Federal guidelines, we highlight some best practices for intake paperwork and informed consent.

Intake Paperwork

- **Client face sheet:** Must include (but not limited to) demographic information, emergency contact, & insurance carrier
- **Provision of Notice of Privacy Practices & Acknowledgment** must be reviewed and signed by client or guardian
- **Grievance Appeal Process & State Guide to Medi-Cal** must be documented that it was explained/offered to the client or guardian
- **Releases of information** are completed, signed, filed and updated annually if needed. Client is made aware that they can revoke releases at any time
- **Advanced Directives brochure** is explained, reviewed and documented that it was provided
- Information is provided to clients which includes an explanation of the **cancellation/no show policy**

Links and References

[Psychotropic Consent Template]

[Notice of Privacy Practices]

[Notice of Privacy Practice Acknowledgment]

[Advanced Directive]

[State Guide to Medi-Cal]

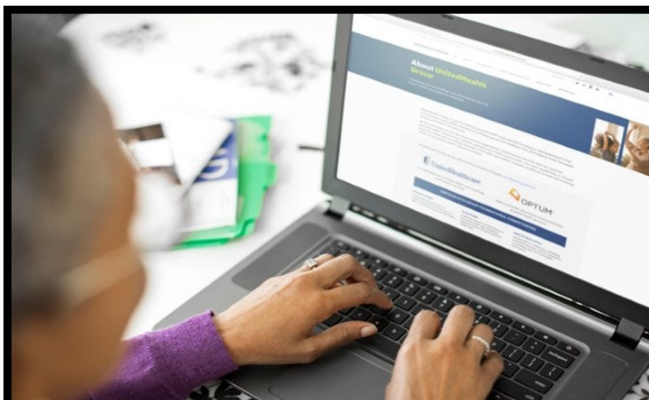
[Quick Guide to Medi-Cal]

[Grievance and Appeal Brochure]

[Beneficiary Materials Order Form]

Informed Consent

- **Consent for treatment:** Documentation explains risk of noncompliance, right to terminate/refuse treatment, description of services, limits of confidentiality, emergency coverage, therapist availability and who client/guardian can contact in the event of an emergency
- **Informed consent for psychotropics** must be reviewed and signed with client or guardian and updated whenever changes are made to medications. See example template in links and references
- The initial **client checklist** is a helpful guide to ensure all the above elements are incorporated into your chart (see below for link)



Have Questions?

Email us at: SDQI@Optum.com

**Beneficiary materials also available in threshold languages on Optumsandiego.com*