

PATIENT RECORDS & CONTINUOUS IMPROVEMENT PROCEDURES

Patient records shall be maintained for a minimum of 5 years from the time that the documented treatment is provided. If the patient is a juvenile, the records shall be kept for a minimum of five years from the time the patients reaches 18 years old.

Patient records shall include the following:

1. Identifying and basic demographic data and the results of the screening process.
2. Documentation of program compliance with the program's policy regarding prevention of multiple admissions.
3. The initial assessment report.
4. A narrative biopsychosocial history.
5. All physical and biopsychosocial assessments.
6. Medical reports including all laboratory tests, any results from the Controlled Substance Monitoring program database, progress notes and documentation of current dose and other dosage data.
7. Dated case entries of all contacts with the patient including counseling notes in chronological order.
8. Dates and results of case conferences for patients.
9. Individualized plan of care or treatment strategies and any changes to the plan.
10. Documentation that services listed in plan of care have been offered or provided.
11. Coordination of care agreements signed by the physician, patient and primary counselor.
12. Documentation that the program made a good faith effort to determine if the patient is in any other OBMAT program.
13. Documentation of patients copy of rules and regulations, a copy of patient's rights and responsibilities, a copy of the patient's plan of care, a copy of the patient's goals and documentation that each of these were discussed with the patient.
14. Consent forms, releases of information, prescription information, travel and employment.
15. A closing summary and reason for discharge or referral and any knowledge of death if such an event occurs.
16. Primary counselor or physician shall document any patient contacts and should include the reason for and nature of contact, the patients current condition, any significant events since last contact, an assessment of patient status and a plan of action for further treatment.
17. Each entry shall be completed by the next business day or within 3 business days

both dated and signed by the staff person.

If an OBMAT program **closes or discontinues**, the program shall arrange for continued management of all patient records as follows:

- A. CCHS shall notify the secretary in writing of the address where records will be stored and specify the Individual or organization who will be managing the records with their contact information.
- B. CCHS shall arrange for the storage of each record through one or more of the following records:
 - 1. CCHS shall continue to manage the patient records.
 - 2. CCHS shall transfer records of patients who have given written consent to another program.
 - 3. CCHS shall enter into an agreement with another OBMAT program to store and manage patient records.

Continuous Quality Improvement Policy

1. Staff and volunteers shall participate in regular and continuous staff education.
2. A service delivery assessment shall be performed on all participants at least quarterly. This shall include:
 - A. A review of the patient's charts to ensure completeness of documentation;
 - B. A review of the individualized treatment plan and services delivered;
 - C. Linkage to primary care services and services as well as medications for other health conditions;
 - D. Monitoring of patient outcomes including:
 - i. Reduction of use or elimination of patient's use of illicit opioids and other illicit drugs
 - ii. Problematic use of licit drugs:
 - iii. Elimination of criminal activity associated with illicit drug use
 - iv. Reduction of patients' behaviors contributing to the spread of infectious disease as appropriate
 - v. Improvement in quality of life as demonstrated in areas of relationship stability, housing, or employment.

Patient name _____ Date of CQI Review _____

Assessment of Patient Outcomes

Missing items: _____

Completion of patient review

Reviewer's signature