



# Monterey County Behavioral Health Policy and Procedure

<b>Policy Number</b>	467
<b>Policy Title</b>	Medical Record Review Annual Updates
<b>References</b>	None
<b>Form</b>	Annual Review Update
<b>Effective</b>	May 15, 1998 Revised: September 16, 2011

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## Policy

It is the policy of MCHD-BHD that certain components of the medical records must be updated and completed, at its anniversary date.

## Procedure

1. Following components must be completed at the minimum of once a year at its anniversary date:
  - a. A finalized Treatment Plan
  - b. A finalized Psychosocial Assessment
  - c. A Mental Status Examination
  - d. A Diagnosis
  - e. Consents for Services
  - f. Medical Necessity
  - g. Release of Information forms (if applicable)
  - h. Medication(s) Informed Consents
  - i. Referral for Annual Physical
  - j. Outcome Measures
  - k. UMDAP
2. Utilization Review (authorization) may not be approved without completion of above requirements