



Mental Health Assessment | **ADULT**

Complete CSI	CSI Standalone Collection (Client)	
Complete Clinical Assessments	Cal AIM Assessment (Client)	<ul style="list-style-type: none"> • Must be signed by LPHA • Program Supervisor co-signature needed • Completed annually by LPHA
	Mental Status Exam (Client)	
	Cost Agreement and/or Paper UMDAP Financial Assessment	<ul style="list-style-type: none"> • Client and Clinicians signs • UMDAP completed by Clinician when self pay, no funding source, private insurance, or Medicare only • Cost Agreement completed by AA when Medi-Cal, Medi-Cal SOC, or Grant Funded • Program Supervisor co-signature needed for UMDAP
Complete Assessment Service Note	Service Note	<ul style="list-style-type: none"> • "Total Service Time" includes bundled total service time
Complete Diagnosis Document	Diagnosis Document (Client)	<ul style="list-style-type: none"> • Review every active diagnosis each time a Diagnosis Document is completed • Update when a change of diagnosis is indicated
Make Needed Referrals	Service Note / Transition of Care (CalMHSA)(client)	<ul style="list-style-type: none"> • Transfer between SMHS programs use TCM/ICC Service Note • Transfers to Non-Specialty MH (CenCal or CHC) use Transition of Care document
(If needed) Complete NOABD	Paper Forms	<ul style="list-style-type: none"> • If not moving on, complete this step • HIT provides staff with fillable NOABD PDF, enters info into SC, assigns to staff to sign