



**Substance Use Disorder Uniform Record Manual (SUD URM)  
Form Updates April 2017**

<b>Form</b>	<b>Revision based on:</b>	<b>What has changed</b>
Throughout the instructions/forms	Federal/State language changes. Updated language to "Substance Use Disorder" or "SUD"	<ul style="list-style-type: none"> <li>Updated footers from "ADS" to "SUD"</li> </ul>
Client File Order	Edits to all documents	<ul style="list-style-type: none"> <li>Updated this "Table of Contents" document to reflect changes throughout the forms.</li> </ul>
Initial and Extension QAR forms	Request from QAR Lead	<ul style="list-style-type: none"> <li>Updated physical info requirements</li> <li>Changed IOP to IOT</li> </ul>
DMC Eligibility Printout Instructions	Most current DHCS website information	<ul style="list-style-type: none"> <li>Updated the verification of eligibility information to match DHCS website information. Removed sample forms.</li> </ul>
Initial Screening	DHCS audit and updated information	<ul style="list-style-type: none"> <li>Items re-organized for ease of use</li> <li>"Vocational achievements" was added</li> <li>AOD Treatment History was added</li> <li>Interim Services removal of fee info</li> </ul>
CalOMS forms	Updated from MIS unit	<ul style="list-style-type: none"> <li>Forms and instructions updated for ease of use.</li> <li>Profile form S109A now has an additional Collateral Contacts S109B if applicable</li> <li>Admission record is in one complete pdf with additional Payor Group Enrollment if applicable, and Contact Information</li> <li>Renumbering on all forms start with an "S": Profile S109A and S109B, Intake S110, Admission S111, Annual Update S112, Discharge S113</li> </ul>
Client Personal Rights	Most current DHCS website information	<ul style="list-style-type: none"> <li>Updated contact information for complaints.</li> </ul>
Stay Review Justification	DHCS information	<ul style="list-style-type: none"> <li>Per DHCS, DSM-5 will be acceptable in documentation. Updated form to reflect this.</li> </ul>
Centrally Stored Medication and Destruction Record	Most current DHCS website information	<ul style="list-style-type: none"> <li>Form was updated to removed "Department of Alcohol and Drug Programs" and included DHCS information.</li> </ul>
DHCS Health Questionnaire	Updated DHCS form 6/16	<ul style="list-style-type: none"> <li>Received approval from DHCS to remove items asked in other forms (e.g., ASI).</li> <li>Developed a new Health Questionnaire based on new items from DHCS health questionnaire</li> </ul>
Physician Direction Form	Elimination of outdated information	<ul style="list-style-type: none"> <li>References to "waiving the physical exam" were removed.</li> </ul>
Medical Necessity Note	"DHCS Title 22 DMC requirements for Determination of Diagnosis	<ul style="list-style-type: none"> <li>Renamed the "Diagnosis Determination Note"</li> <li>"Basis for Diagnosis" must be documented by a Therapist, Physician Assistant, Nurse</li> </ul>



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	and Medical Necessity Fact Sheet: August 2016” and recent DHCS audit	Practitioner, or MD <ul style="list-style-type: none"> <li>Title 22 defines a Therapist as a California licensed psychologist, social worker, or MFT, or an intern registered with the California Board of Psychology or the California Board of Behavioral Sciences</li> </ul>
Recovery/Treatment Plan Instructions	Title 22	<ul style="list-style-type: none"> <li>Added reminder that if client has not had a physical exam within the 12 month period prior to admission, a goal for this must be included on the plan. Also, if client has a significant illness, a goal that the client obtain appropriate treatment for the illness must be included.</li> </ul>
Recovery/Treatment Plan	Above “Fact Sheet”, MHSUDS Information Notice No. 16-051, and updated information	<ul style="list-style-type: none"> <li>Medical necessity is established by the MD printing name, signing and dating the initial treatment plan and updated treatment plans</li> <li>Both DSM description and ICD-10 code must be on the treatment plan</li> <li>Added checkbox to indicate an initial or updated plan</li> </ul>
Progress Note	DHCS Information	<ul style="list-style-type: none"> <li>Changed Activity code for “DCH” to “IOT”</li> </ul>
Weekly Progress Note	DHCS Information	<ul style="list-style-type: none"> <li>Changed Activity code for “DCH” to “IOT”</li> </ul>
Client Discharge Plan	Title 22 Requirements	<ul style="list-style-type: none"> <li>Added question for specific “relapse triggers” and “how to avoid a relapse with these identified triggers”</li> <li>Items re-organized or eliminated for ease of use</li> </ul>