

# **ST. CLAIR COUNTY COMMUNITY MENTAL HEALTH AUTHORITY**

## **ADMINISTRATIVE PROCEDURE**

Date Issued **7/23**

Page **1**

<b>CHAPTER</b> Administrative		<b>CHAPTER</b> 01	<b>SECTION</b> 002	<b>SUBJECT</b> 0060
<b>SECTION</b> Operations		<b>SUBJECT</b> General Document Management		
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### **I. APPLICATION:**

#### **ST. CLAIR COUNTY CMH**

- ☐ SCCCMH Board
- ☐ SCCCMH Providers and Subcontractors
- ☒ Direct-Operated Contractors
- ☐ Community Agency Contractors
- ☐ Residential Programs
- ☐ Specialized Foster Care

### **II. PURPOSE STATEMENT:**

St. Clair County Community Mental Health Authority (SCCCMHA) shall have a system of structure for its general management and transmission of documents (non-case record).

### **III. DEFINITIONS:**

- A. File Path Name: Identifying information on a computer produced document, which includes typist's initials, document name, date created/updated and the electronic location of the document.
- B. Facsimile: The electronic transmission of an image or document over telephone line as data.
- C. Mail: Internal, external, interoffice, U.S. Postal Mail, facsimiles (not generally email).

### **IV. STANDARDS:**

- A. SCCCMHA will maintain a system of mail boxes for the purpose of transmitting documents.
- B. Mailboxes will be available for agency departments, programs, outside designated agencies/programs and for staff as appropriate.
- C. Mailboxes should be used for business purposes.
- D. All documents/mail transmitted in and out of offices, buildings and programs, whether via the U.S. Postal Service or interoffice, shall be "marked" with a date (date stamping) as it is received.

<b>CHAPTER</b> Administrative		<b>CHAPTER</b> 01	<b>SECTION</b> 002	<b>SUBJECT</b> 0060
<b>SECTION</b> Operations		<b>SUBJECT</b> General Document Management		

- E. Facsimile documents automatically are printed with a date and time stamp.
- F. All non-case record documents created will be identified with a file path name.
- G. All document transmittals shall be in compliance with the Michigan Mental Health Code and HIPAA.

V. PROCEDURES:

A. **File Path Name**

- 1. Follow steps outlined on Exhibit A.

B. **Date Stamping Documents/Mail**

**Designated Clerical**

- 1. Receives and distributes all documents and mail according to the mailbox system; mailboxes set up with SCCCMHA staff names.

**Each Program/Office**

- 2. Opens all documents/mail, marks with a date and distributes to the respective mailbox as needed.
- 3. EXCEPTIONS to this procedure:
  - a. Special forms, contracts or books sent to SCCCMHA **should not** be date stamped. Date stamp a post-it note and attach it to the item.
  - b. Mail that staff have requested not to be opened and/or date stamped. (Please inform the receptionist or clerical designee that handles the mail in your building/on your floor as to what item(s) should not be opened and/or date stamped.)
  - c. "Confidential" and mail marked "Personal" should not be opened. Date stamp the front of the envelope.
  - d. Other items such as: Mail for medical personnel, Bank Statements, Friend of the Court, Bankruptcy Notices, Garnishment Notices, Employee Medical Testing (McLaren IHS – TB Tests, Drug Screens, Medtox, Employee Medical Benefit Items, and Unemployment Information, should not be opened. Date stamp the front of the envelope.
  - e. Incoming mail requiring a signature (i.e. certified mail: a SCCCMH Staff will sign for it

<b>CHAPTER</b> Administrative	<b>CHAPTER</b> 01	<b>SECTION</b> 002	<b>SUBJECT</b> 0060
<b>SECTION</b> Operations	<b>SUBJECT</b> General Document Management		

unless it is addressed to the Chief Operating Officer or Finance. If addressed to either of them, the 1<sup>st</sup> floor clerical staff shall contact Administrative Clerical staff to obtain a signature.

**C. Facsimile Transmittals**

**Staff**

1. Must refrain from transmitting protected identifiable health information and/or lengthy documents.
2. Must refrain from personal use of Agency fax machines unless approval has been obtained.
3. Uses the SCCCMHA Fax (Facsimile) Transmittal Cover Sheet Form (CMH Fax Cover) that contains verbiage regarding confidential, privileged information, or information that is exempt from disclosure.
4. Does not leave the fax machine unattended when faxing unidentifiable information and does not fax any identifiable personal information, unless it is an emergency.
5. Emails or calls the intended recipient prior to sending the emergency fax and then follows up to confirm receipt of the document by the intended recipient.

**VI. REFERENCES:**

- A. Health Insurance Portability and Accountability Act of 1996 (HIPAA)
- B. Health Information Technology for Economic and Clinical Health Act of 2009 (HITECH)
- C. Mental Health code, Section 330.1748

**VII. EXHIBITS:**

- A. File Path Name

**VIII. REVISION HISTORY:**

Dates issued 01/21, 09/21, 09/22.

## EXHIBIT A

### FILE PATH NAME

A. Once a document has been created, insert a file path name, date and time by completing the following:

1. Type initials (example: cdc)
2. Space
3. Click on insert
4. Click on Quick Parts
5. Click on Field
6. In Choose a Field area, click on FileName
7. In Field Options area, click in box "Add path to filename"
8. Click on "OK"
9. Click on insert
10. Click on Date and Time
11. Choose the format with the date and time stamp
12. Click OK

Example: L:/Dr. Browne/1-3-08schedule.doc Created on 12/27/2007 4:15 PM

**OR**

B. Types, using a typewriter, the path name, typists initials and date on reports where it is not possible for the software to include the information within the document. (e.g., database software).

**OR**

C. After updating information on a document, the filepath name, date and time should be updated immediately after, using the following steps:

1. Highlight the initials in the filepath name
2. Change the initials to your own (if necessary)
3. Right click on the filepath name
4. Click on update, field
5. Click on OK
6. Click on the date and time field
7. Click on update field
8. Click on OK