

## Retention and Classification Report

**Agency:** Department of Human Services. Division of Mental Health. Community Mental Health Centers (1427)  
150 W. North Temple  
Salt Lake City, UT 84145  
801-538-4270

**Records Officer:** \_\_\_\_\_

17249	*Adult out-patient client clinical records
17250	*Child out-patient client files
17251	*Client discharge summary sheet file
17252	*Patient service summary

**AGENCY:** Department of Human Services. Division of Mental Health. Community Mental Health Centers

**SERIES:** 17249

3

**TITLE:** Adult out-patient client clinical records

**DATES:** 1970-2015.

**ARRANGEMENT:** Alphabetical by client's name

**DESCRIPTION:**

This is a clinical record kept on each adult client who has been treated at the clinic as an out patient. Patients can be transferred to the Utah State Hospital for inpatient treatment. This series includes a Clinic Psychosocial Assessment, Diagnosis, Treatment Plan, Application for Treatment, Progress Notes, Treatment Reviews, Day Treatment Attendance and Summary, copies of prescriptions, Medication Use Profile, Intake Form, Pre-Admission Form, Court Orders, and all related correspondence. Information from these files are shared with the Utah State Hospital and any other Utah State Community Mental Health Center where a client has been transferred.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series were specifically approved by the State Records Committee.

**APPROVED:** 09/1988

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 10 years after date of last contact and then destroy provided Discharge Summary Sheet has been removed from file.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s).

**PRIMARY DESIGNATION:**

Controlled

**AGENCY:** Department of Human Services. Division of Mental Health. Community Mental Health Centers

**SERIES:** 17250

3

**TITLE:** Child out-patient client files

**DATES:** 1970-2015.

**ARRANGEMENT:** Alphabetical by client's name

**DESCRIPTION:**

This is a clinical record kept on each child who has been treated at the clinic as an out patient. Patients can be transferred to the Utah State Hospital for inpatient treatment. Information from these files are shared with the Utah State Hospital, and any other Utah State Community Mental Health Center where a client has been transferred. This series includes a Clinic Psychosocial Assessment, Diagnosis, Treatment Plan, Progress Notes, Treatment Reviews, Day Treatment Attendance and Summary, copies of prescriptions, Medication Use Profile, Intake Form, Pre-Admission Form, Court Orders, and all related correspondence.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series were specifically approved by the State Records Committee.

**APPROVED:** 09/1988

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 10 years after date of last contact or until child reaches the age of 25 and then destroy provided Discharge Summary Sheet has been removed from file.

**APPRAISAL:**

These records have administrative, fiscal, and/or legal value(s).

**PRIMARY DESIGNATION:**

Controlled

**AGENCY:** Department of Human Services. Division of Mental Health. Community Mental Health Centers

**SERIES:** 17251

3

**TITLE:** Client discharge summary sheet file

**DATES:** 1970-2015.

**ARRANGEMENT:** Alphabetical by client's name

**DESCRIPTION:**

This is a client discharge summary which indicates the status of the client after his last date of contact. This sheet must be pulled from the client's case file prior to destruction of the record. This series includes admission date, discharge date, reason for termination/transfer/or referral, summary of services, evaluation of treatment goals, post termination plan (follow-up), final diagnosis, name of last responsible therapist, initial and final GAS score, presenting problems, Reason for Termination/Transfer/Referral, and client's identification number.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series were specifically approved by the State Records Committee.

**APPROVED:** 09/1988

**FORMAT MANAGEMENT:**

Paper: Retain in Office permanently.

**APPRAISAL:**

These records have administrative, fiscal, historical, and/or legal value(s). Retention is based on the Division of Mental Health Policy and Procedure Manual.

**PRIMARY DESIGNATION:**

Controlled

**AGENCY:** Department of Human Services. Division of Mental Health. Community Mental Health Centers

**SERIES:** 17252

3

**TITLE:** Patient service summary

**DATES:** 1980-2004.

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

This is a client appointment sheet used to record appointments made and kept by a client. This record is used for billing and auditing purposes.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series were specifically approved by the State Records Committee.

**APPROVED:** 09/1988

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years after the year ends or until all audits have been completed and then destroy.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s).