

# **SANILAC COUNTY COMMUNITY MENTAL HEALTH AUTHORITY**

## ADMINISTRATIVE PROCEDURE

**NUMBER: DA1023**

**NAME: FORMS DEVELOPMENT AND DISTRIBUTION**

INITIAL APPROVAL DATE:	05/23/1996	BY: Administrative Committee
(LAST) REVISION DATE:	10/18/2018	BY: Policy Committee
(LAST) REVIEW DATE:	07/14/2022	BY: Policy Committee
DISCONTINUED DATE:	N/A	REPLACED BY: N/A

**I. PURPOSE**

To establish a uniform practice for the development and distribution of forms and handouts

**II. APPLICATION**

Populations: NONE  
Programs: All Direct and Contracted

**III. POLICY**

It is the policy of Sanilac County Community Mental Health Authority (Sanilac CMH) to assure that all documentation formats meet the standards of funding and accrediting bodies through management review, and through the utilization of consistent formats throughout Agency programs and services. It is the policy of Sanilac CMH to coordinate service forms/formats as required and/or feasible with those of the Region 10 PIHP (Region 10).

**IV. DEFINITIONS**

Forms: All agency forms that are standardized documents used to complete agency business.

Handout: Any standardized agency document that is distributed to staff or individuals served by one or more programs.

**V. STANDARDS**

A. Forms/handouts developed and required by Region 10 (including those in computer programs such as OASIS) for utilization by all Region 10 Boards will be approved via the mechanisms of Region 10 and will be adopted without further approval. These forms/handouts will not have to adhere to the standards identified herein but should be forwarded by the responsible staff to the clerical team for tracking and/or distribution as outlined below.

B. All drafts of forms and handouts originating with Sanilac CMH must be created or modified on agency computers utilizing Microsoft Word or Excel and retained on the originating computer until after approval.

**C. NEW FORMS**

1. All new or newly revised forms, except for those professionally printed, will be created on white paper, unless approved by the Department Officer.

2. All forms shall become the responsibility of the Agency's Policy Committee, which shall be reviewed and updated at least annually, with input from appropriate experts.
3. The person/committee/department drafting a NEW form or handout will forward it to the Policy Committee. Approval must be obtained as follows:
  - If the form will only be used by one program or department, the Policy Committee will grant approval after confirmation with the appropriate Program Officer.
  - If it will be used by more than 1 program or agency wide or reflects a substantive change in Agency policy or procedure, the Policy Committee will ask for review and approval from the Administrative Committee.
4. The Policy Committee will review the form or handout to ensure that all the information is correct, that the form/format meets the standards identified in this procedure, and that there is no conflict with an existing form/format required by Sanilac CMH or Region 10.
5. If approved, the form or handout will be sent by the Policy Committee to the clerical team.
6. The clerical team will include a footer on the document that reflects that the Policy Committee is responsible for the form/handout and the date of the review.
7. The clerical team will maintain a complete list of each form and have it available for all staff.

D. REVISED FORMS

1. Persons wishing to modify an existing document contained on the Agency's Forms List must request the modifiable format of the current form from the clerical team and utilize it in the revisions.
2. The Policy Committee will be responsible for review of each form at least annually. That review shall include expert input from appropriate Agency staff or Committees. Changes will be forwarded by the Policy Committee to the clerical team for implementation. If a determination that no changes or revisions are necessary, the review date at the bottom of the form will be modified to reflect review at a minimum.

E. ISSUES

1. Whenever there is a lack of compliance with standards, or a conflict with an existing form/format noted, such information will be included in the minutes of the Administrative Committee or Policy Committee meeting and the form will be returned to the author for modification and resubmission as needed.
2. The clerical team will maintain a database of forms, a binder of hard copies, and will keep a log of all forms and handouts under revision. The clerical team will post the form on the internal web page and give notice to staff via email that the form is new or the form was changed and what the changes are.
3. All up to date forms are available on the Agency website.

VI. **ATTACHMENTS**

VII. **REFERENCES**