



Quick Guide: Clinical Documentation Reminders for Telehealth Services

Behavioral Health Services (BHS) providers should document the following in each telehealth progress note (Orange County Behavioral Health Services, April 2020):

The reason the telehealth service is being provided, identifying the barrier(s) preventing the client from receiving in-person services

The telehealth service is intended to take the place of an in-person service

The service being provided is medically necessary and clinically appropriate to be delivered through telehealth

The client has agreed to the telehealth service and the provider received verbal and/or written consent

The specific platform being used to provide the telehealth service (e.g. WebEx, Zoom)

The steps taken to ensure the client's privacy was protected (e.g., in a separate room, closed door, did not address client by name)

Discussion with the client regarding limitations or potential lack of confidentiality (e.g. client's acknowledgement of setting and possibility of others overhearing conversation and agreement to proceed with receiving services)

BHS providers should adhere to all Mental Health Plan (MHP), Drug Medi-Cal Organized Delivery System (DMC-ODS), and/or Health Care Agency BHS clinical documentation requirements. Providers should refer to BHS's [Documentation of Services](#) Policy & Procedure (P&P) as well as documentation resources provided for [MHP](#) and [DMC-ODS](#) programs by the BHS Quality Management Services (QMS) Division. Note the BHS Combined Informed and Telehealth Consent.