### Chart Monitoring Tool - Substance Use Disorder Treatment

#### Local Authority: [Field]

#### Risk Score: [Field]

#### Chart Number | Site | Age | Insurance | Screening and Assessment | Recovery Plan | Progress Notes | Continuing Recovery Support
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**Screening and Assessment**

1. **SUD** Screening
2. **MH** Screening
3. **EBP - Criminogenic Risk Screening Tool, RANT, etc.**
4. **C-SSRS/Safety Plan if indicated**
5. **ASAM - (a) Assessment Dimensions and Justification (b) Level of Care Recommendation (c) ASAM Goals included in Recovery Plan & Reviews**
6. **Standardized assessment instrument or a structured clinical interview**
   - (a) Treatment History
   - (b) Trauma History
   - (c) Assess for Tobacco and MAT
   - (d) Co-Occurring SUD and MH
   - (e) Culture Considered
   - (f) Engagement and Ongoing Assessment
   - (g) Confidentiality - 42 CFR / HIPAA

**Recovery Plan**

- 1. **Recovery Plan is individualized and includes evidence of the individual / family's involvement in the plan**
- (a) Goals, objectives and interventions are measureable, time limited and achieveable
- (b) Tobacco and MAT is addressed and provided if needed
- (c) Trauma is addressed and services provided if needed
- (d) Recovery supports are identified throughout treatment and individuals are linked to services as needed

**Progress Notes**

- Tie to the assessment, recovery plan and progress notes and identify progress or lack of progress in treatment

**Continuing Recovery Support**

- Identifies recovery support, ongoing services, referrals and provides follow-up care as needed