



SOAR Records

1. Clinical Records Cx Assessment (65E-4.014.6.a (1)(2)(3)) Assessment is completed 30 days after intake and include the following with client input:
 - a. Current and potential strengths and problems
 - b. information from the intake and evaluation
 - c. Description of the client's current and potential strengths and problems, the client's family and friends, pertinent service agencies with whom the client has been involved, and other social support systems that may contribute to the course of treatment.

2. Clinical Records Cx Assess Trx Plan (65E-4.014(6), F.A.C.) Treatment Plan/Service Plan must be completed, and the actions specified in the plan must be initiated for each active client within 30 days after completion of intake.

3. Clinical Records Cx Client Record (65E-4.014.3.b.11) Client Record includes:
Legal status

4. Clinical Records Cx Client Record (65E-4.014.3.b.2) Client Record includes:
Staff name who has primary responsibility of client

5. Clinical Records Cx Client Record (65E-4.014.3.b.8) Client Record includes:
Time-specific release of information, signed/dated by client/guardian, authorizing a designated the agency to receive the information

6. Clinical Records Cx client records (65E-4.014.3.b.1) Client Record includes:
Marital status.

7. Clinical Records Cx Client Records (65E-4.014.3.b.1) Client Record includes:
Sex.

8. Clinical Records Cx Client Records (65E-4.014.3.b.1) Client Record includes:
Race.

9. Clinical Records Cx Client Records (65E-4.014.3.b.1) Client Record includes:
Date of birth.

10. Clinical Records Cx Client Records (65E-4.014.3.b.1) Client Record includes:
Guardian contact information for minor clients.

11. Clinical Records Cx Client Records (65E-4.014.3.b.1) Client Record includes:
Referral source.

12. Clinical Records Cx Client Records (65E-4.014.3.b.1) Client Record includes:
Client Name

13. Clinical Records Cx Client Records (65E-4.014.3.b.1) Client Record includes:
Telephone number.

14. Clinical Records Cx Client Records (65E-4.014.3.b.1) Client Record includes:
Address.



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15. Clinical Records Cx Progress Notes (65E-4.014.3.c) Progress notes shall be prepared at least monthly for clients having a service or treatment plan unless documented otherwise. Content shall include:
3) Modified service or treatment plan from changes in client's needs, resources, findings.
16. Clinical Records Cx Progress Notes (65E-4.014.3.c) Progress notes shall be prepared at least monthly for clients having a service or treatment plan unless documented otherwise. Content shall include:
1) Contact dates with client, family, friends, or service agencies;
17. Clinical Records Cx Progress Notes (65E-4.014.3.c) Progress notes shall be prepared at least monthly for clients having a service or treatment plan unless documented otherwise. Content shall include:
2) Progress, or lack thereof, relative to the service plan or treatment plan
18. Clinical Records Cx Requirements Record ID
19. Clinical Records Cx Requirements Client Initials
20. Clinical Records Cx Requirements Client Identifier
21. Clinical Records Cx Termination (65E-4.014.3.d) Termination report must be in the record within 4 weeks after official termination of services.
Termination Report shall include:
2) Date and signature of individual preparing report.
22. Clinical Records Cx Termination (65E-4.014.3.d) Termination report must be in the record within 4 weeks after official termination of services.
Termination Report shall include:
3) If there is a referral, a reason for the referral must be noted.
23. Clinical Records Cx Termination (65E-4.014.3.d) If no contact over 90 days, file must be closed, unless service or treatment plan indicates less frequent contact. Reason for termination must be included.
24. Clinical Records Cx Termination (65E-4.014.3.d) Termination report must be in the record within 4 weeks after official termination of services.
Termination Report shall include:
1) Evaluation of impact of agency's services on client's goals or objectives.
25. Clinical Records Cx Trx Plan (65E-4.014.6.b) Completed 30 days after intake with the following goals and objectives with client input:
a. Achievable, observable, measurable.
26. Clinical Records Cx Trx Plan (65E-4.014.6.b) Completed 30 days after intake with the following goals and objectives with client input
27. Clinical Records Cx Trx Plan (65E-4.014.6.b) Completed 30 days after intake with the following goals and objectives with client input:
e. 1 goal for each treatment issue



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28. Clinical Records Cx Trx Plan (65E-4.014.6.b) Completed 30 days after intake with the following goals and objectives with client input:

d. Incorporate needs and strengths from assessment

29. Clinical Records Cx Trx Plan (65E-4.014.6.b) Completed 30 days after intake with the following goals and objectives with client input:

g. If service is unavailable within the agency, Primary therapist must link client to appropriate agencies.

30. Clinical Records Cx Trx Plan (65E-4.014.6.b) Completed 30 days after intake with the following goals and objectives with client input:

c. Actions needed to attain the goals and staff responsible.

31. Clinical Records Cx Trx Plan (65E-4.014.6.b) Completed 30 days after intake with the following goals and objectives with client input:

b. Reasonable timeframe