

## Emergency COVID-19 Project Documentation

1. Admission Documents (storage and organization of documents to be determined by agency):
  - COVID-19 Screener: screening tool for identifying client eligibility for project admission
  - If admitted, also complete:
    - Consent Form (consent for participation in project)
    - GPRA Intake (data collection interview)
    - Collateral Contacts (list of individuals to contact/support client)
    - Releases of Information (for Collateral Contacts and others as appropriate)
    - Exception Request form can be used to request an exception as appropriate
2. Direct Service Requirements:

SAMHSA has outlined [requirements regarding funding limitations \(page 7\)](#), those are outlined within the Direct Services Requirements attachment on the website
3. Services
  - Emergency COVID-19 Service Type/Definition document: provides definitions, categorical limitations and how to document services provided
  - Monthly Tracking Form: to be used to document what services clients receives; the number of times received in a month and how much total by category and per month is provided to client
    - To be submitted monthly with the financial claim in IowaGrants
    - Critical Incident Report: to be used to document critical incidents that occur when client is enrolled in grant services, should be emailed to the Project Director
4. Site Visit documentation:
  - December and March financial documentation (supporting documentation if there were any funds billed under the line item budget during those months)
  - Client Record Review
    - ✓ Admission documents (see above)
    - ✓ Supporting documentation for services billed to the grant
      - Care Coordination (supporting documentation that reflects what coordination was provided)
      - Care Coordination with GPRA Interviews (Receipt Form for the GPRA Follow-up Incentive)
      - Contingency Management (Receipt Form for each incentive documenting sessions attended)
      - Co-pay/Co-insurance/Service Fee and Case Rate (an excel sheet that reflects the services [date/type of service] by client)
      - Pharmacological Interventions (documentation of adherence to medical protocols, documentation of medication prescription and/or pharmacy receipt, documenting client receipt of goods or services – Receipt Form, documenting each service in the provider's records)
      - Gas Cards/Transportation (Receipt Form and receipt)
      - Receipts are not required for incentives (Contingency Management and GPRA Follow-up)