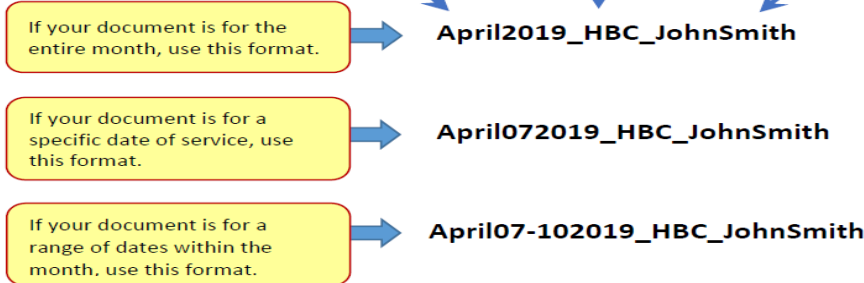


Documentation File Saving Format

- All documents should be saved using the following format for file name.
 1. Providers must save each required document using the following naming format as: **“Date of Service_Service_Client name”**. See examples below:

Date of Service	Type of Service	Client Name
April2019	HBC	JohnSmith



- The following type of service code should be used by our agency.
 - Home Based Casework-HBC
 - Parent Education- PE
 - Resource Family Support Services- RFSS
 - Parenting Assessment-PFFA
 - Habilitation-CMHIHAB
 - Training and Support for Unpaid Caregiver-CMHITS
- The following format should be used in the email subject line
 - Date of Service _ Service Code _ Client Name _ Description Of Document
 - Example: April242019_PE_JohnSmith_AAPI
 - Example: April05-152019_PE_JohnSmith_Monthly Report
 -

Where to send / Upload Documents

Assessment@purposefulparentingllc.com

- Client Assessments that need to be scored
- In the subject line put “NEW” for a client that has not had an assessment completed before & “Returning” for clients that have had assessments completed before.

All Documentation Related to Client or Client Service

- TheraNest-Clinical- Documents Tab
or
- CaseManagement Pro-Attachments

All Documentation Related to Service Providers File

- Bamboo HR