

Patient Name: \_\_\_\_\_

Date: \_\_\_\_\_

DOB/Medical Record #: \_\_\_\_\_

**For All Patients with Mental Health Issues, Providers Should Complete the Following:**

- Complete a comprehensive risk assessment including patient interview, record review and solicitation of information from family/parents. **If you do not feel qualified to complete a comprehensive risk assessment, refer the patient for urgent evaluation and verify completion.**
  - If the patient is 18 or older, or if you believe confidentiality is required by law or common medical practice, seek an authorization to release information for the family/parents **or** document a compelling reason not to do so. Be assertive and persuasive in obtaining this authorization.
  - Interview the family to obtain additional history about the patient and to determine what the family/parents already know about the illness/need for treatment. An authorization is not necessary to do this.
  - Obtain authorizations to obtain information from all previous treatment providers and promptly request treatment records, including psychotherapy notes, psychiatric treatment, and relevant medical records.
  - Review the medical records carefully to gain a comprehensive knowledge of risk factors for the patient.

**Where an elevated risk of suicide is identified in adult patients (or when patient is a minor in Oregon), take the following steps regardless of whether or not one has a signed authorization:**

- Following the initial evaluation, communicate with the patient and the family/parents regarding diagnoses, treatment recommendations and safety issues. Do **not** assume they know anything about the nature of mental illness, treatment, risk factors, or community resources.
- Explicitly inform the family in the presence of the patient of all safety issues, including risk factors for suicide and what steps to take if danger exists, such as ridding the home of firearms/other means of self-harm and creating a plan to monitor and support the patient.
- Discuss available community resources to help the family and patient, including resources for case management, support groups, improving mental health at home, and other relevant factors.
- Coordinate provision of care when a patient transitions from one level of care to another, or one provider to another:
  - Involve patient and family in planning process including discussion of interim safety plan.
  - Assure follow up is in place with a specific timely appointment.
  - Assure accepting provider has full knowledge of history and risk issues/records.
  - Confirm that patient has attended the follow up appointment.

**Additional Notes:**

Clinician Signature: \_\_\_\_\_

Date: \_\_\_\_\_