


# Using Checklists: CBHS

All enrolled clients must have a “Checklist” filled out on their case record. The checklist indicates which documents and consent forms have been completed AND uploaded to the case record. [Click here](#) for more information on how to upload files.

## Create a new documents checklist

Related List Quick L

1. Navigate to your client's Case Record.
2. Hover over the Checklist related list link on the top left of the case record. 
3. Click NEW to create a new checklist.
4. When you create a new checklist, each document will default to NO.
  - a. **Therapy Consent Form** and **HIPAA Acknowledgement** → select YES once the client has signed the document and it has been uploaded to the Case Record.
  - b. **WHOQOL Consent Form** → there are several different options to select from to indicate whether or not the client has consented to participate in the WHOQOL evaluation:
    - **NO** - default
    - **YES** – the client has consented and the consent form has been attached to the case record. Do NOT change the status to YES unless the consent form has been signed and attached.
    - **VERBAL** – this value should only be used if the client has granted verbal consent to participate in the WHOQOL assessment. The therapist must still upload a consent form and sign their name. In the “Client’s Name” field on the form, enter “Verbal Consent.” This option should only be used in rare cases when it is not possible to collect signed consent.
    - **CLIENT OPT OUT** – the client has opted NOT to participate in the WHOQOL evaluation
    - **NOT INDICATED** – the therapist has determined that participation in the WHOQOL evaluation is not appropriate for the client at this time
    - **NOT APPLICABLE** – select for children, couples and family therapy cases. Only adult clients receiving individual therapy should be offered the opportunity to complete the WHOQOL.
    - **WITHDRAWN** – the client has the ability to opt out of the WHOQOL evaluation at any time. If they choose to do so, select this option and enter the date the client withdrew their consent.

## New Checklist: CBHS Checklist

**Fields**

\* Case Record  
Joey Ramone TEST CBHS 3/2022 Case Record X

**Required Documents**

Therapy Consent Form NO	WHOQOL Consent Form NO
HIPAA Acknowledgement NO	WHOQOL Consent Withdrawn Date ⓘ [Calendar Icon]

Cancel Save & New Save

## View or Update an existing documents checklist

To view or update an existing documents checklist (if the family brings in documents not yet received):

1. Hover over the **Checklists** related list.
2. Select the **Checklist record** (the item that says "Checklist" and then has a number)

Related List Quick Links ⓘ

Checklists (1) Service Entries (9) Progress Notes (9) Files (9) Assessment (4) Housing Tracker (6) Income & Non-Cash Benefits (0) Case Participations (10)

**Checklists**  
1 item • Updated a few seconds ago

Checklist #	Therapy Consent Form	HIPAA Acknowledgement	WHOQOL Consent Form	WHOQOL Consent Withdrawn D...
1 Checklist-15790	YES	YES	CLIENT OPT OUT	

View All

3. If you need to **UPDATE** the status of a document, you can do so by clicking on the pencil icon next to the relevant document.