



ADMINISTRATIVE RULES OF MONTANA



24.155.402 RECORDS

- (1) Licensees must maintain the following records for each client:
 - (a) an initial intake form which includes:
 - (i) name of client;
 - (ii) health history;
 - (iii) current health status;
 - (iv) consent of the client to treat;
 - (v) date; and
 - (vi) client signature; and
 - (b) session notes, including:
 - (i) date;
 - (ii) services provided;
 - (iii) comments from licensed therapist; and
 - (iv) signature or initials of licensed therapist.
- (2) Licensees must document in the client's records, at the time the initial intake form is required, if the client refuses to complete the client intake form.
- (3) Licensees are required to maintain records for four years from the last date of service to the client.
- (4) Any violation of this rule is considered unprofessional conduct.

Authorizing statute(s): 37-1-131, 37-1-136, 37-1-319, MCA

Implementing statute(s): 37-1-131, 37-1-136, 37-1-319, MCA

History: NEW, 2020 MAR p. 1327, Eff. 7/25/20.