

San Mateo County Behavioral Health and Recovery Services
 Quality Management
Managed Care Site and Chart Review – Individual Providers

Provider _____ **Address** _____ **City** _____

Phone _____ **Fax** _____ **Email** _____

Office	Review	Yes	No	Notes
Physical Environment	Office space is safe and suitable for San Mateo County clients.			
	Consumer Rights & Problem Resolution Brochures are available upon request.			
Safety	Provides clients with information to access emergency care during non-business hours.			
	Office is wheelchair accessible.			
Medical Records	Secure storage system for active and inactive charts.			
	Client records are retained for a minimum of 10 years, except for minors, whose records are kept for at least 1 year after the minor has reached 18 years, but in no case less than 10 years.			
Documentation	Standards	Yes	No	Notes
Overall Chart	Each client has a separate and distinct chart.			
	Re-authorization paperwork and other relevant documents are in the chart.			
Progress Notes	Every note is signed with the service date, name, & license			
	There must be a progress note for every service date.			
	Every progress note must be legible.			
	Interventions relate to diagnosis and treatment plan goals.			
	Notes document any high risk SI/HI/other with updates.			
	Face to face minutes with the client present.			
	CPT code.			
	The language services were provided in.			
	Location of services.			
	As needed, notes show coordination with PCP/others.			
If applicable, client signed authorization to release PHI.				
Med Consent (Recommended, if applicable)	Signed w/ license and dated w/in 12 months by physician.			
	Signed and dated by client/parent.			
	Includes all medications ordered for client.			

Comments

Reviewer _____ **Date** _____