

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
<b>Physical Environment</b>	Office space is safe and suitable for San Mateo County clients.			
	Consumer Rights & Problem Resolution Brochures are available upon request.			
<b>Safety</b>	Provides clients with information to access emergency care during non-business hours.			
	Office is wheelchair accessible.			
<b>Medical Records</b>	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.			
<b>Documentation</b>	<b>Standards</b>	<b>Yes</b>	<b>No</b>	<b>Notes</b>
<b>Overall Chart</b>	Each client has a separate and distinct chart.			
	Re-authorization paperwork and other relevant documents are in the chart.			
<b>Progress Notes</b>	Every note is signed with provider's name and license.			
	Dated, legible progress note for every service claimed.			
	Interventions relate to diagnosis and treatment plan goals.			
	Notes document any high risk SI/HI/other with updates.			
	As needed, notes show coordination with PCP/others.			
	If applicable, client signed authorization to release PHI.			
<b>Med Consent</b> (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 \_\_\_\_\_