

Category: Health Information- Mental Health	Subject: Medical Staff Review  County of San Luis Obispo: Behavioral Health Department
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## Purpose:

To review all Physician/NP/PA documentation for completeness (County and Contract staff)

## Procedure:

### Weekly

1. Go to Services (My Office).
  - a. Set Filters to see services with Warnings or Errors for all dates for the Prescriber and your program.

- i. Download list for report.
  - b. Check prior week's services for location, procedure for discrepancies.

1. Make corrections if necessary to ensure that the service details are coded properly.
    2. The Open Payment Database Notification for Physicians & Surgeons needs to be completed at IPE for services rendered by MD. Check services for Prescriber Assessment. Ensure form is scanned into record.
2. Client flags-run a list page (Client Flags (My Office) for prescriber to show all open flags that are assigned to them:
  1. See if there are any incomplete item(s) that are related to the medical provider.
3. In the Supervisee Documents widget on your Dashboard, click on the prescriber's "In Progress" link. It'll take you to the Supervision Reports page where you can run a list page to show all "Not signed, not completed, not co-signed" items. These would be missing notes and unfinished/unsigned notes, as well as any documents that have been assigned to prescriber for co-signature.

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#### Supervisee Documents

	Due Now	In Progress	Due in 14 days	Co Sign	Assigned	To Acknowledge
Andrade, Erica Christi...	0	2	0	0	0	0
Beardsley, Megan Lynn	0	0	0	5	0	0
Delgado, Abril	0	5	0	0	0	0
Delisle, Randall David	0	0	0	15	0	0
Dewitt, Jayana Michell...	0	13	0	0	0	0
Erickson, Hana	0	0	0	0	0	0

#### Supervision Reports (284)

Supervision Documents

Not Signed, Not Completed, Not Co-Signed

All Documents

Apply Filter

All Teams

Member...

Due in x days

Dewitt, Jayana Michelle

Member	Document	Description	Author	Program
	Psychiatric Note	08/10/2023(To Do)	Dewitt, Jayana...	All Authors
	Psychiatric Note	08/09/2023(To Do)	Dewitt, Jayana...	All Authors
	Psychiatric Note	08/09/2023(In Progress)	Dewitt, Jayana...	All Authors
	Psychiatric Note	08/08/2023(To Do)	Dewitt, Jayana...	All Authors
	Progress Note	08/08/2023(In Progress)	Dewitt, Jayana...	All Authors
	Psychiatric Note	08/07/2023(In Progress)	Dewitt, Jayana...	All Authors
	Psychiatric Note	08/04/2023(To Do)	Dewitt, Jayana...	All Authors
	Narrative	08/02/2023(To Do)	Dewitt, Jayana...	All Authors
	Narrative	08/01/2023(To Do)	Dewitt, Jayana...	All Authors

4. In Orders (My Office) Check for pending Results Obtained orders for review.

a. Filters should be January 2025 to today's date, status: Results Obtained, and Ordered by: Prescriber.

Start Date 01/01/2025

End Date 03/20/2025

Received From

Received To

Apply Filter

All Assigned Staff

Results Obtained

Client ID

Client Name

Penepacker, Stephen

All Programs

Labs

All Priorities

All Clinic/Locations

b. Download list for weekly report.

5. Per your schedule, at least weekly, review all older items for completeness and add new items until all items are completed.

6. Encrypt memo & list page reports and email to medical staff, program supervisor, Michelle Archer, and Kathy McGuire. Do not send it to the interim medical director, once we have a permanent Medical Director this will resume.

a. If there are no items to report, send email to the above recipients that have no items to report.

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## MEMORANDUM

DATE:

TO:

FROM:

CC: Program Supervisor, Michelle Archer & Kathy McGuire

MR #	Deficient item	Date	Comments

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### Revision History

Date:	Section Revised:	Details of Revision:
3-24-21	New	
8-28-23	Updated	All sections with SmartCare and medical director
Prior Approval dates:		