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

Purpose:

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

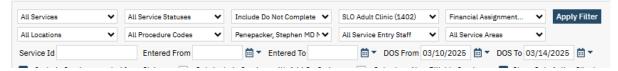
Procedure:

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.



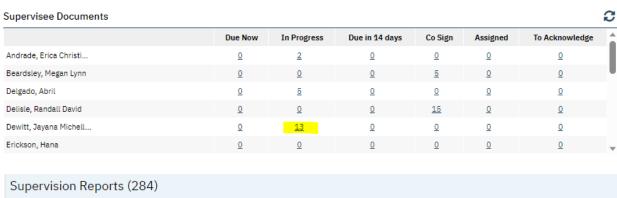
- i. Download list for report.
- b. Check prior week's services for location, procedure for discrepancies.

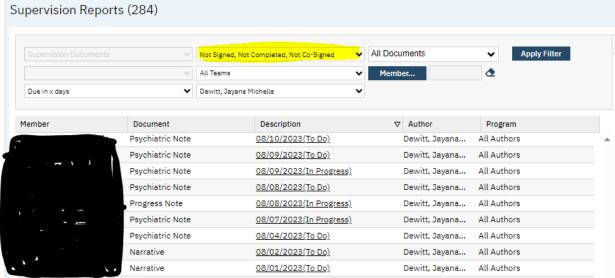


- 1. Make corrections if necessary to ensure that the service details are coded properly.
- 2. The Open Payment Database Notification for Physicians & Surgeons needs to be completed at IPE for services rendered by MD. Check services for Prescriber Assessment. Ensure form is scanned into record.
- Client 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 cosigned" items. These would be missing notes and unfinished/unsigned notes, as well as any documents that have been assigned to prescriber for co-signature.

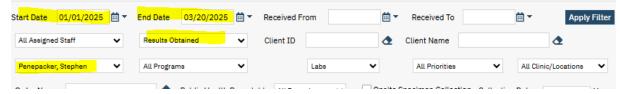
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- 4. In Orders (My Office) Check for pending Results Obtained orders for review.
 - Filters should be January 2025 to today's date, status: Results Obtained, and Ordered by: Prescriber.



- 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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Health Information-	
Mental Health	County of San Luis Obispo: Behavioral Health Department

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:			