

The Primary Care Behavioral Health Chart Review Tool

Confidential: The purpose of this tool is to assure quality in documentation by Behavioral Health Consultants working in the PCBH Model.

BHC: _____ MR#: _____ Date of service: _____

Date of review: _____ Reviewer: _____

	YES	NO	N/A	Comments:
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Documentation in Medical Record

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|--|--|--|--|--|
| 1. Entries are brief, specific, and accurate. | | | | |
| 2. Each encounter contains written or electronic signature of the BHC. | | | | |
| 3. All entries are completed and signed within 3 working days. * | | | | |

Behavioral Health Documentation Content

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|--|--|--|--|--|
| 4. Includes name of referring provider and referral problem or question. | | | | |
| 5. Subjective includes life context assessment. | | | | |
| 6. Subjective includes functional analysis of target problem. | | | | |
| 7. Subjective includes suicide/homicide risk assessment as indicated. | | | | |
| 8. Follow-up notes assess change and patient experience with the initial consult plan. | | | | |
| 9. Objective includes description of patient behavior and/or outcomes instrument measure (e.g., Duke for adults, PSC-17 for children). | | | | |
| 10. Assessment includes medical diagnosis by referring PCP (as applicable) and/or other diagnosis by PCP or BHC. | | | | |
| 11. Functional analysis problem conceptualization is in the note. ** | | | | |
| 12. Plan includes interventions for patient and follow-up plan. | | | | |
| 13. Plan includes recommendations for PCP. | | | | |

Feedback to BHC from Reviewer (including any corrective action needed):

* This may vary depending on clinic policy.

** Depending on note format, may be described in the plan, the assessment, or an open general comments field.

Figure 9.13. PCBH chart review tool.