

BPA HEALTH
EAP/Behavioral Health Client Record and Site Review Tool

Review Date:		Review Type*:	
Provider Name:		Provider License:	
Provider Address:		City:	
State:			
Reviewer Name:		Reviewer License:	
*If review due to "other" describe:			

Quality Assurance Review Totals

Total Scored:	0
Total Possible:	0
Final Score:	#DIV/0!

Treatment Record Review

	Treatment Record Requirements and Scoring	Member Name						Comments
		Total	Poss.	Total	Poss.	Total	Poss.	
1	Chart includes Member/Client Name, Address and contact phone number(s). (Scoring: Yes = 1 point if record includes name, address and phone, 0 if missing)							
2	Chart includes appropriate Confidentiality Form(s). (Scoring: Yes = 1 point if HIPAA and/or Release of Information, 0 if missing/incomplete or NA)							
3	Is the record legible? (Scoring: Yes = 1, No = 0)							
4	Is the member's current issue documented? (Scoring = 1 point, 0 if missing. Diagnosis is not required)							
5	Is the member's identifier (name or number) on each entry? (Scoring: Yes = 1, No = 0)							
6	Dated documentation for each billed session? (Scoring: Yes = 1 point per session, No = 0 for each missing note)							
7	Provider signed each note with name and credential(s). (Scoring: Yes = 1 point per session, No = 0 if missing)							
8	File includes documentation of assessment of risk of harm to self or others. (Scoring: Yes = 1, No = 0)							
Treatment Record Review Subtotal:		0	0	0	0	0	0	

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Facility Review

Facility Requirements and Scoring (Provider attestation, complaints may require on-site visits for verification)		Total	Poss.	Comments
9	Accessible parking for individuals with physical disabilities. (Scoring: Yes = 1, No = 0)			
10	Accessible access to office for individuals with physical disabilities. (Scoring: Yes = 1, No = 0)			
11	Accessible restroom for individuals with physical disabilities. (Scoring: Yes = 1, No = 0)			
12	Charged fire extinguisher in office. Verify date. (Scoring: Yes = 1, No or expired = 0)			
13	Member/client records are protected from public access in locked file cabinets, or if electronic files are encrypted. (Scoring: Yes = 1, No = 0)			
14	Provider's license is displayed in office. (Scoring: Yes = 1, No = 0)			
Facility Review Subtotal:		0	0	

Comments