

## 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:
<i>Documentation in Medical Record</i>				
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. *				
<i>Behavioral Health Documentation Content</i>				
4. Includes name of referring provider and referral problem or question.				
5. Subjective includes life context assessment.				
6. Subjective includes problem context (functional assessment of target problem).				
7. Subjective includes suicide/homicide risk assessment as indicated.				
8. Follow-up notes assess change in problem 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 of problem and formulation of plan is in the note. **				
12. Plan includes SMART goal(s) 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.

**Fig. 7.7** PCBH Chart Review Tool

