


PRE-CREDENTIALING SITE REVIEW TOOL

Provider_Name	<input type="text"/>	Location	<input type="text"/>
License	<input type="text" value="Please select a value..."/>	Reviewer Name	<input type="text" value="Please select a value..."/>
Date of Review	<input type="text"/> 	Total Audit Score	0 Out of 40
		Compliance Rate	0 %

Rating Scale: Y = Yes N = No N/A = Not Applicable

Environment of Care

Q1. The office location is easily identifiable from the street and/or client is informed how to access the office.	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q1. Comment	<input type="text"/>		
Q2. The office appearance is reasonably neat and clean.	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q2. Comment	<input type="text"/>		
Q3. The waiting room is of adequate size and reasonably comfortable.	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q3. Comment	<input type="text"/>		
Q4. The clinical offices are of adequate size and reasonably comfortable.	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q4. Comment	<input type="text"/>		
Q5. The office furnishings and decor are appropriately professional.	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q5. Comment	<input type="text"/>		
Q6. There are no culturally insensitive or offensive materials posted.	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q6. Comment	<input type="text"/>		
Q7. There are accessible and functional fire extinguishers in the office or there is a fire suppression system.	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q7. Comment	<input type="text"/>		
Q8. The exits are well marked and free of obstruction.	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A

Q8. Comment

Medi-Cal Beneficiary Protections

Q9. Grievance and appeal poster is accessible in the waiting areas and/or the office area. Yes No N/A

Q9. Comment

Q10. Access and Crisis Line poster/brochure is visibly posted. Yes No N/A

Q10. Comment

Q11. Advanced Directives Brochure is accessible. Yes No N/A

Q11. Comment

Q12. Limited English Proficiency poster is posted in the waiting areas and/or the office area. Yes No N/A

Q12. Comment

Q13. Guide to Medi-Cal Mental Health Services or Medi-Cal Quick Guides are accessible. Yes No N/A

Q13. Comment

Q14. Client grievance and appeal forms and brochures are available without requiring a consumer to request them from office personnel. Yes No N/A

Q14. Comment

Q15. Professional licensure is current and available. Yes No N/A

Q15. Comment

Q16. The office has a policy and/or process in place to ensure that clients are not discriminated against in the delivery of health care services based on race, ethnicity, national origin, religion, sex, age, mental or physical disability or medical condition, sexual orientation, claims experience, medical history, evidence of insurability (including conditions arising out of acts of domestic violence), disability, genetic information, or source of payment. Yes No N/A

Q16. Comment

Q17. Provider understands serious incident reporting requirements. Provider knows how to access and complete County of San Diego BHS Serious Incident Report. Provider maintains a log of any serious incidents involving Medi-Cal beneficiaries. Yes No N/A

Q17. Comment

Information Privacy and Security

Q18. For providers with electronic health records only: The provider has a process to maintain a "back-up" copy of all electronic health records.

Yes No N/A

Q18. Comment

Q19. The computer screen locations do not violate client confidentiality.

Yes No N/A

Q19. Comment

Q20. The practice site has an organized system of filing information in the treatment records.

Yes No N/A

Q20. Comment

Q21. There are appropriate levels of security and confidentiality of data (locked cabinets, charts and serious incident reports in secure areas, secure fax line, and secure computer systems).

Yes No N/A

Q21. Comment

Q22. The practice site maintains the confidentiality and safety of treatment records in accordance with any applicable statutes and regulations.

Yes No N/A

Q22. Comment

Q23. If records need to be transported to another location, there is a protocol in place to maintain confidentiality of records throughout the transportation process.

Yes No N/A

Q23. Comment

Q24. Discharged client records are completed and filed within 30 days. Records are maintained for a minimum of 10 years except for minors, whose records shall be kept at least 10 years after the minor has reached the age of 18.

Yes No N/A

Q24. Comment

Q25. Provider understands privacy incident reporting requirements. Provider knows how to access HHS portal and complete online County of San Diego BHS Privacy Incident Report. Provider maintains a log of any privacy incidents involving Medi-Cal beneficiaries.

Yes No N/A

Q25. Comment

Intake

Q26. There is written protocol for accommodating clients in the event of a life threatening emergency. Yes No N/A

Q26. Comment

Q27. The provider makes arrangements for emergency coverage for all clients 24 hours per day/7days per week. (Review how coverage is provided) Yes No N/A

Q27. Comment

Q28. Information is provided to clients which includes a description of services and goals of care. Yes No N/A

Q28. Comment

Q29. Information is provided to clients which includes the hours during which care and services are available and is comparable to non Medi-Cal clients. Yes No N/A

Q29. Comment

Q30. Information is provided to clients which includes an explanation of the cancellation/no-show policy. Yes No N/A

Q30. Comment

Q31. Clients are informed they have a right to refuse to participate in treatment. Yes No N/A

Q31. Comment

Q32. Clients are informed that information about them and their families is protected and kept confidential. Yes No N/A

Q32. Comment

Accessibility for Individuals with Disabilities

Q33. If the office is not accessible for individuals with disabilities, does the provider screen for accessibility needs prior to the first session and provide services in an alternative setting, or refer clients out as needed? Yes No N/A

Q33. Comment

Q34. The office has accessible parking spaces. Yes No N/A

Q34. Comment

Q35. The office has an access ramp allowing wheelchair entrance into the building.	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q35. Comment	<input type="text"/>		
Q36. The office has doorways wide enough for wheelchair access.	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q36. Comment	<input type="text"/>		
Q37. The office has an accessible restroom.	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q37. Comment	<input type="text"/>		
Q38. If the provider has any animals in the office, are clients informed prior to the first session? (N/A indicates the provider has no animals in the office)	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q38. Comment	<input type="text"/>		
Q39. Are the animals certified pet therapy animals?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q39. Comment	<input type="text"/>		
Q40. Are the animals used as part of the therapeutic process?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> N/A
Q40. Comment	<input type="text"/>		
Medications (For Medication Service providers only)			
Q41. Prescription drugs are labeled in compliance with state and federal laws.	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> N/A
Q41. Comment	<input type="text"/>		
Q42. Prescription drugs are stored at proper temperatures (room temperatures at 59-86 F and refrigerated drugs at 36-46 F).	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> N/A
Q42. Comment	<input type="text"/>		
Q43. Prescription drugs are stored in a locked area with access limited to those medical personnel authorized to prescribe, dispense, or administer medication.	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> N/A
Q43. Comment	<input type="text"/>		
Q44. Prescription drugs are not retained after the expiration date.	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> N/A
Q44. Comment	<input type="text"/>		

Q45. Multi-dose vials of injectable medications are dated and initialed when opened.

Yes

No

N/A

Q45. Comment

Q46. Provider disposes of expired, contaminated, deteriorated, and abandoned drugs in compliance with state and federal laws.

Yes

No

N/A

Q46. Comment

Q47. A prescription drug log is maintained to ensure the provider disposes of expired, contaminated, deteriorated, and abandoned drugs in compliance with state and federal laws.

Yes

No

N/A

Q47. Comment

Q48. Prescription drugs are dispensed only by persons lawfully authorized to do so.

Yes

No

N/A

Q48. Comment

Q49. There is a health permit for disposal of infectious waste/sharps.

Yes

No

N/A

Q49. Comment

Save

Cancel

Print to PDF