



**MONITORING AND TECHNICAL ASSISTANCE SITE VISIT
(MTASV) TEMPLATE FOR THE
MHLA BEHAVIORAL HEALTH EXPANSION PROGRAM**

REVISED MTASV TEMPLATE EFFECTIVE JANUARY 10, 2023

Community Partner Clinic Name	
Due Date of MTASV Materials	
Date MTASV Materials Received	
Total Number of Charts Selected For Review <i>[A chart refers to a clinical or medical record, an Electronic Health Record (EHR), or an Electronic Medical Record (EMR)]</i>	
Name and Contact Information of Lead DMH Site Reviewer	

ANSWER EACH OF THE FOLLOWING QUESTIONS PER CHART

INDICATORS	REVIEWER COMMENTS
1. CLAIMING AND DATA OUTCOMES	
a. Were Mental Health Prevention Services (MHPS) codes used correctly (H0002 for MHPS screening and H2014 for MHPS follow-up sessions)?	
b. Were the BUPPS factor scores reported consistently between the chart documentation and on the BUPPS surveys themselves?	(1) MHPS screening session (2) MHPS discharge session
c. When applicable, were the BUPPS factor scores reported consistently between the BUPPS survey and the discharge summary?	(1) MHPS screening session (2) MHPS discharge session
d. i. Did each claim have a corresponding chart note?	
ii. Did each chart note have a corresponding claim?	



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INDICATORS	REVIEWER COMMENTS
2. DOCUMENTATION	
<p align="center">GENERAL REQUIRED ELEMENTS FOR MHPS SCREENING PROCESS (H0002)</p> <ol style="list-style-type: none"> 1. Date of Service 2. Name of Rendering Provider 3. Duration of Session in Minutes 4. Procedure Code 5. Service Modality (Individual or Group) 6. Face-to-Face or Telephonic 7. Patient Name and MHLA PID # 8. Note Narrative 9. Staff Signature 	
A. MHPS SCREENING PROCESS (H0002)	
I. Were all nine (9) required documentation elements found in note?	
II. Was the BUPPS administered?	
III. Was the BUPPS survey included in chart?	
IV. Was a discussion with patient about their BUPPS scores documented?	
V. Was the evaluation of risk factors and protective factors, as well as a review of other relevant information to determine if there was a need for MHPS documented?	



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INDICATORS	REVIEWER COMMENTS
<p>GENERAL REQUIRED ELEMENTS FOR MHPS FOLLOW-UP SESSIONS (H2014)</p> <ol style="list-style-type: none"> 1. Date of Service 2. Name of Rendering Provider 3. Duration of Session in Minutes 4. Procedure Code 5. Service Modality (Individual or Group) 6. Face-to-Face or Telephonic 7. Patient Name and MHLA PID # 8. Name of Curriculum (Stress, TIC, or Grief and Loss) 9. Note Narrative 10. Staff Signature 	
<p>B. MHPS FOLLOW-UP SESSIONS (H2014)</p>	
<p>COMPLETE THE FOLLOWING SECTION FOR EACH H2014 SESSION</p>	
<p>I. Were all ten (10) required documentation elements found in note?</p>	
<p>II. When required, was the BUPPS utilized in the H2014 session?</p>	
<p>III. When utilized in the H2014 session, was the BUPPS survey included in the chart?</p>	
<p>IV. Did documentation include a narrative of what was covered in the H2014 session?</p>	