

**Optum Public Sector San Diego
SITE REVIEW TOOL**

Provider Name		Review Type			
License		Location			
Date of Review		Reviewer Name			
Total Audit Score:	0	Total Audit Questions:	29	Compliance Rate:	0%

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.	
Comments:	
Q2. The office appearance is reasonably neat and clean.	
Comments:	
Q3. The waiting room is of adequate size and reasonably comfortable.	
Comments:	
Q4. The clinical offices are of adequate size and reasonably comfortable.	
Comments:	
Q5. The office furnishings and decor are appropriately professional.	
Comments:	
Q6. There are no culturally insensitive or offensive materials posted.	
Comments:	
Q7. There are accessible and functional fire extinguishers in the office or there is a fire suppression system.	
Comments:	
Q8. The exits are well marked and free of obstruction.	
Comments:	

Medi-Cal Beneficiary Protections

Q9. Problem Resolution poster is accessible in the waiting areas and/or the office area.	
Comments:	
Q10. Access and Crisis Line poster/brochure is visibly posted.	
Comments:	
Q11. Advanced Directives Brochure is accessible.	
Comments:	
Q12. Limited English Proficiency poster is posted in the waiting areas and/or the office area.	
Comments:	
Q13. Integrated Behavioral Health Member Handbook or Quick Guide to BHS Services are accessible.	
Comments:	
Q14. Problem Resolution Process brochures and client grievance and appeal forms are available without requiring a consumer to request them from office personnel.	
Comments:	

Q15. Professional licensure is posted.	
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Comments:

Q16. Provider maintains a log of any critical incidents involving Medi-Cal beneficiaries.	
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Comments:

Q17. The provider has created a professional will to ensure continuity of care for their clients, in the case the provider is no longer able to render services.	
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Comments:

Q18. Prescribers only: Open Payments Database Notice is posted in the waiting areas and/or the office area. If applicable, the notice has been posted onto provider's website.	
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Comments:

Information Privacy and Security

Q19. For providers with electronic health records only: The provider has a process to maintain a back-up copy of all electronic health records.	
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Comments:

Q20. The computer screen locations do not violate client confidentiality.	
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Comments:

Q21. The practice site has an organized system of filing information in the treatment records.	
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Comments:

Q22. 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).	
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Comments:

Q23. The practice site maintains the confidentiality, safety and retention of treatment records in accordance with any applicable statutes and regulations.	
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Comments:

Q24. If records need to be transported to another location, there is a protocol in place to maintain confidentiality of records throughout the transportation process.	
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Comments:

Accessibility for Individuals with Disabilities
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Q25. 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?	
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Comments:

Q26. The office has accessible parking spaces.	
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Comments:

Q27. The office has an access ramp allowing wheelchair entrance into the building.	
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Comments:

Q28. The office has doorways wide enough for wheelchair access.	
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Comments:

Q29. The office has an accessible restroom.	
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Comments:

Medications (For prescribers only)

Q30. Prescription drugs are labeled in compliance with state and federal laws.	N/A
Comments:	
Q31. Prescription drugs are stored at proper temperatures (room temperatures at 59-86 F and refrigerated drugs at 36-46).	N/A
Comments:	
Q32. Prescription drugs are stored in a locked area with access limited to those medical personnel authorized to prescribe, dispense, or administer medication.	N/A
Comments:	
Q33. Prescription drugs are not retained after the expiration date.	N/A
Comments:	
Q34. Multi-dose vials of injectable medications are dated and initialed when opened.	N/A
Comments:	
Q35. Provider disposes of expired, contaminated, deteriorated, and abandoned drugs in compliance with state and federal laws.	N/A
Comments:	
Q36. A prescription drug log is maintained to ensure the provider disposes compliance with state and federal laws.	N/A
Comments:	
Q37. There is a health permit for disposal of infectious waste/sharps.	N/A
Comments:	
Q38. MD/DO only: The Physicans Notice to Consumers is posted in the waiting areas and/or the office area.	N/A
Comments:	