

## M E M O R A N D U M

**Date:** 6/5/2017  
**To:** Supervisors and Managers of Behavioral Wellness and  
Community Based Organizations  
**From:** Quality Care Management  
**Subject:** Process for Becoming a Note Reviewer  
**CC:**

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The process to become a note reviewer for *management* is as follows:

1. The manager will send an email to QCM requesting to become a note reviewer.
2. The QCM Coordinator will ensure that the manager is current on all documentation training.
3. The manager will participate in one Note Reviewer training.
4. The manager will request the Note Reviewer Worksheet from QCM.
5. The manager will select one client to complete the worksheet on. This client should not be a client whom the staff has provided documentation for. The staff will complete the note reviewer worksheet and email back to QCM.
6. The QCM Coordinator will evaluate the worksheet and provide any feedback to the manager.
7. The QCM Coordinator will send the outcome to the manager.
8. If it is determined that the manager can become a note reviewer, the QCM coordinator will alert MIS to enable staff to be a note reviewer.
9. If it is determined the manager did not provide appropriate review feedback, the manager can request to be re-evaluated in 30 days.

The process to become a note reviewer for *supervisor/ line-staff* is as follows:

1. The manager will ensure that the staff person is up to date on all documentation trainings.
2. The manager will ensure that the staff person has gone through the process to be removed from note review.
3. The staff person will participate in one Note Reviewer training.
4. The staff person will request the Note Reviewer Worksheet from QCM.
5. The staff person will select one client to complete the worksheet on. This client should not be a client whom the staff has provided documentation for. The staff will complete the note reviewer worksheet and email back to QCM.
6. The QCM Coordinator will evaluate the worksheet and provide any feedback to the staff person.
7. The QCM Coordinator will send the outcome to the staff person and manager.
8. If it is determined that the staff person can become a note reviewer, the QCM coordinator will alert MIS to enable staff to be a note reviewer.
9. If it is determined the staff person did not provide appropriate review feedback, the manager can request the staff person be re-evaluated in 30 days.