

Example of how the form is completed in response to review of a patient chart:

You find the following in the patient’s chart:

- 1) At the initial OB visit, GA 12 weeks the chart contained a completed screener.
- 2) Although the patient came for multiple visits in the second half of her pregnancy, the chart did not contain a completed screener for the second half of pregnancy.
- 3) The patient did not come for a postpartum visit.

You would fill out Part I of the extraction form as follows:

	Yes Place a check in the boxes below for each Yes response	No Place a check in the boxes below for each No response	N/A Place a check in the boxes below for each not applicable response
PART I - DETECTION			
I-A. Detection of Depression			
Early pregnancy screening (0-20 weeks GA)			
Are there depression screening results in the patient medical record (i.e., scanned EPDS, PHQ-2, PHQ-9 form, or documented score?)	✓		
Late pregnancy screening (21 weeks or more GA)			
Are there depression screening results in the patient medical record (i.e., scanned EPDS, PHQ-2, PHQ-9 form, or documented score?)		✓	
Early postpartum screening (0-3 months pp)			
Are there depression screening results in the patient medical record (i.e., scanned EPDS, PHQ-2, PHQ-9 form, or documented score?)			✓

Chart Spot Check Form: Perinatal Mental Health Screening, Assessment and Treatment

*Using the questions below, extract data from **10-20** charts of perinatal individuals who are at least 3 months (12 weeks) postpartum.*

Date _____ Chart number _____ Initial Visit Gestational Age _____ weeks

Yes <small>Place a check in the boxes below for each Yes response</small>	No <small>Place a check in the boxes below for each No response</small>	N/A <small>Place a check in the boxes below for each not applicable response</small>
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PART I - DETECTION

I-A. Detection of Depression

Early pregnancy screening (0-20 weeks GA)

Are there depression screening results in the patient medical record (i.e., scanned EPDS, PHQ-2, PHQ-9 form, or documented score)?			
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Late pregnancy screening (21 weeks or more GA)

Are there depression screening results in the patient medical record (i.e., scanned EPDS, PHQ-2, PHQ-9 form, or documented score)?			
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Early postpartum screening (0-3 months pp)

Are there depression screening results in the patient medical record (i.e., scanned EPDS, PHQ-2, PHQ-9 form, or documented score)?			
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I-B. Detection of Anxiety

Early pregnancy screening (0-20 weeks GA)

Are there anxiety screening results in the patient medical record (i.e., scanned GAD-2, GAD-7, or PASS form or documented score)?			
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Late pregnancy screening (21 weeks or more GA)

Are there anxiety screening results in the patient medical record (i.e., scanned GAD-2, GAD-7, or PASS form or documented score)?			
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Early postpartum screening (0-3 months pp)

Are there anxiety screening results in the patient medical record (i.e., scanned GAD-2, GAD-7, or PASS form or documented score)?			
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I-C. Detection of PTSD

Early pregnancy screening (0-20 weeks GA)

Are there PTSD screening results in the patient medical record (i.e., scanned PC-PTSD or PCL-C form or documented score)?			
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Late pregnancy screening (21 weeks or more GA)

Are there PTSD screening results in the patient medical record (i.e., scanned PC-PTSD or PCL-C form or documented score)?			
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Early postpartum screening (0-3 months pp)

Are there PTSD screening results in the patient medical record (i.e., scanned PC-PTSD or PCL-C form or documented score)?			
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I-D. Detection of Bipolar Disorder

Are there bipolar disorder screening results in the patient medical record (i.e., scanned MDQ or CIDI form or documented score) at any time point?			
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If there are any antidepressant medications prescribed for mood or anxiety conditions (such as SSRIs, SNRIs, NDRIs), is there a completed bipolar screen administered at any time before prescribing?			
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PART II - ASSESSMENT

	Yes <small>Place a check in the boxes below for each Yes response</small>	No <small>Place a check in the boxes below for each No response</small>	N/A <small>Place a check in the boxes below for each not applicable response</small>
If any perinatal mental health condition (e.g., EPDS, GAD, MDQ) screen was positive at any time point:			
was the positive screen assessed by a licensed independent practitioner (e.g., Ob/Gyn NP, midwife) as noted in the progress notes (e.g., documentation of symptoms, SIGECAPS, presence/absence of SI/HI, etc.) or on the screening instrument (e.g., signature/date on the instrument)?			
did the obstetric care clinician check any labs to rule out medical causes of the condition (e.g., TSH, B12, folate, etc.)?			
Is there documentation of asking about whether the patient had a prior history of psychiatric illness and/or treatment?			
If yes, is there documentation that the obstetric care clinician addressed this or gave psychoeducation?			

PART III - TREATMENT

If any perinatal mental health condition (e.g., EPDS, GAD, MDQ) screen was positive at any time point:			
is willingness to engage in treatment noted at any time point?			
is there documentation of current therapy or offering a referral to therapy at any time point?			
is there documentation of current medication treatment or medication treatment offered at any time point?			
is there documentation about providing psychoeducation at any time point?			

PART IV – FOLLOW-UP & MONITORING

If any perinatal mental health condition (e.g., EPDS, GAD, MDQ) screen was positive at any time point:			
was the positive screen(s) addressed by obstetric care clinician during follow-up visits (e.g., mention of symptoms or illness in progress note, notes indicating that symptoms were re-assessed, SIGECAPS, presence/absence of SI/HI, screening tool re-administered to assess changing severity)?			
is there any documentation of a repeat screen after a positive screen?			

PART V – ONGOING CARE

V-A/B/C. Ongoing care for perinatal mental health conditions

If any perinatal mental health condition screen was positive at any time point, is the positive screen(s) noted in the treatment plan at the comprehensive postpartum visit?			
Was medication for any perinatal mental health condition prescribed by an obstetric care clinician at any point in this pregnancy or postpartum period?			
If yes, was prescription(s) continued after care was complete to help the patient avoid gaps in medication treatment?			
If the screener for any perinatal mental health condition is still positive at the postpartum visit, was follow-up care with another health care provider noted (e.g., psychiatrist, therapist, PCP, other OB, etc.) AND/OR was it noted that the obstetric care clinician plans to continue care until transfer to another provider could be arranged?			

V-D. Ongoing care specific to bipolar disorder

If bipolar disorder screen is positive at any time point, is there documentation of referral to or consultation with a psychiatrist for further evaluation and treatment, if the patient is not already under the care of a psychiatrist?			
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Now that you have completed this form, enter the results in the Tool to Schedule Implementation Meetings and Create Practice Goals