

**Department of Mental Health
Adult Community Clinical Services**

Frequently Asked Questions

**Comprehensive Assessment
Requirements for the Annual Review of the Comprehensive Assessment**

Question: What are the requirements for the annual review of the Comprehensive Assessment?

Answer: At a minimum the Comprehensive Assessment must be reviewed and updated annually. The annual update can be completed up to 45 days prior to the annual Community Service Plan date. A new formulation is also completed at this time. Additional assessments are added/updated as needed.

1. Mental Status Exam (MSE):

- a. Either the LPHA overseeing the annual review or another LPHA who knows the person served must complete the MSE.
- b. The MSE must be attached to the annual review (paper records) and signed by that LPHA.
- c. The exam must have been conducted within the past year and prior to the completion of the annual Community Services Plan.
- d. The Massachusetts Standardized Documentation Project (MSDP) MSE form may be used to record the MSE.
- e. If the provider chooses to use another form to record the MSE that form must include all of the information required.

2. Clinical Formulation – Interpretive Summary

- a. A Clinical Formulation – Interpretive Summary must be completed as part of the annual Review.
- b. The Clinical Formulation – Interpretive Summary must be completed by the Licensed Practitioner of the Healing Arts (LPHA).
- c. When completing the Clinical Formulation – Interpretive Summary the LPHA establishes medical necessity for rehabilitative services for the upcoming year and the continued need for the current level of care or a recommendation for a transition of level of care.