



Texas Health Steps Checkup Documentation Improvement

All Texas Health Steps medical and dental checkups and other services require documentation within the client’s medical record to support the service provided. Medical and dental services, including Texas Health Steps checkups, are subject to retrospective review and recoupment if documentation within the client’s medical record does not support the service submitted for payment. State–contracted medical record reviews have shown that client medical records for Texas Health Steps services often have incomplete or missing documentation, making them subject to recoupment.

The [Texas Health Steps Documentation Improvement Provider Letter](#) describes the importance of documenting each component and sub-component of a Texas Health Steps Checkup.

The following resources will assist you in completing Texas Health Steps checkup documentation:

- [Texas Health Steps Clinical Record Review Tool with Instructions](#)
This Excel workbook is available to assist you in self-audits in preparation for health plan quality reviews. This electronic format will self-populate totals with numerical values.
- [Texas Health Steps Clinical Record Review Tool](#)
This PDF provides a printable paper copy of the clinical record review tool. Instructions for paper copy use are included in the Excel workbook.