2015 User Conference

Creating your BLUEPRINT for practice SUCCESS

Basic Chart Auditing

Presented by:
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AGENDA

- Getting Started: The Basics
- Supporting Medical Necessity
- History/Exam/Medical Decision Making
- Additional Documentation Guidelines
- Signature Requirements
- Questions?

Getting Started: The Basics

- Properly identify the patient
- Properly secure the documents
- Identify the patient on every page
- Don't combine family charts
- Keep MVA/BWC data separate
- Complete date on everything
- No Post-it Notes

Getting Started: The Basics

- Sign each entry, including title
- "Legible identity of observer/author"
- Write LEGIBLY or DICTATE
- Use only standard abbreviations
- No white-out, no erasing
- Draw lines through errors and initial
- HEM or SOAP?
- What set of guidelines are you using?

Supporting Medical Necessity

- The most critical part of the medical record
- Why are you seeing the patient today?
- F/U is not sufficient
- "Here to establish"
- Every visit must stand alone as a complete record

HISTORY

- **Chief Complaint**: "Why are you here today?"
- **HPI**- History of Present Illness- tell me a story
  - Location, Severity, Timing, Modifying Factors, Quality, Duration, Context, Associated Signs and Symptoms
  - 2 levels- Brief (1-3) and Extended (4 or more)
- **Review of Systems**
  - Questions about SYMPTOMS, not diseases
  - 4 levels- none, problem pertinent, extended (2-9), complete (10+)
- **Past, Family, Social History- noncontributory??**

EXAM

- What guidelines are you following?
  - 1995 Organ Systems, 1995 Body Areas, or 1997 Systems Exams
- EMR, Dictation, Paper templates, hand-written notes?
- Four levels of exam
  - Problem focused, expanded problem focused, detailed, comprehensive
- What level of exam is medically necessary?

MEDICAL DECISION MAKING

- Number of diagnoses or management options
  - Minimal, Limited, Multiple, Extensive
- Amount/Complexity of Data to be reviewed
  - Minimal, Limited, Multiple, Extensive
- Risk of Complications/Morbidity/Mortality
  - Minimal, Low, Moderate, High
- Medical decision making should support medical necessity

Other Documentation Guidelines

- Time Based Codes
- Preventive services
- Documentation of procedures

Signature Requirements

- Medicare and other payors are denying claims for missing, improper, or illegible signatures.
- All services provided or ordered require the legible identifier.

QUESTIONS?

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