

Steps for Evaluating Notes for Co-Signature

August 2023

1. Medical knowledge:

Does documentation address the reason for the visit and support decisions regarding medical care? Standard of care provided?

If disease management visit-were medications reviewed, side effects evaluated, labs reviewed? Is there an appropriate plan to address any concerns/abnormal results? Follow up plan?

If HTN not controlled is there a clear plan in place?

If acute problem, is their sufficient history to create a differential diagnosis? Are systemic symptoms documented?

Does the exam document the necessary significant neg or positive findings to support assessment/plan?

If wellness visit, have templates been reviewed and updated? Risk assessment appropriate? Have results of PHQ-9/Audit/Swyc etc been addressed? QM tab addressed? Medication refills completed?

Is interpretation of EKG appropriate?

Referrals-Are referrals appropriate? Could we manage internally?

Radiology-Are high end radiology orders appropriate?

Labs-Are the correct labs being ordered? Do they have a specific diagnosis to support the order? Is the lab medically necessary?

2. EHR Use:

Are Encounter Plans being used?

Order sets used?

Free text or templates?

Does the note contain too little too much detail?

Macros being used?

Chart prepped?

3. RAF

Are the most specific diagnosis being added to note? Does documentation support the RAF codes used?

4. Quality

Has the QM tab been addressed? Vaccines given, Cancer screening, tobacco counseling, Diabetes, HTN.

5. Billing Tab:

Medical Decision Making moderate (214: 2 chronic conditions or acute problem with systemic symptoms or unknown outcome or independent historian-why? 215: complex referred to ED)

Time: if billed for time was it documented in note?

25 modifiers-Wellness plus E&M (does the documentation support a separate E&M?)

Counseling codes-Was an EP opened? Is time documented to support code?

Are all boxes Billing slip checked? Green check on all services provided?

Have RAF diagnosis been addressed?