

Chart Prep for Case Reviews

PURPOSE

1. Admin staff prepares Case Review data and patient charts for practitioners.
2. Reduce the number of errors and omissions.
3. Create continuity with labeling and processing.
4. Improve the quality of work within our clinic.
5. Make sure the patient has all required paperwork and testing completed.
6. Increase the ease for the practitioner to review labs and paperwork prior to the appointment.

PROCEDURE

Expected time frame: Charts should be prepared by Friday afternoon for the upcoming week's appointments.

1. Check Cerbo schedule to see Case Review appointments for the next week.
2. Open patient chart.
3. Check to see if the patient has completed Case Review questionnaires.
 - a. If not, send a message to the patient in the portal to remind them to complete at least two days prior to appointment.
 - b. If yes, download all five questionnaires to desktop and use .pdf editor to combine into one document in the following order:
 - i. Metabolic Assessment
 - ii. Food Survey
 - iii. Dietary Habits
 - iv. Mold Survey
 - v. Case Review Questionnaire
 - c. Once combined into one document with the title "mm-dd-yy [Pt First Last Name] CR Documents". Use the CR appointment date as the date in the title.
 - d. Once the questionnaires are received and combined, upload to the patient's chart and leave in unreviewed.
 - e. Check the box to show in the patient's portal.
 - f. Delete all of the individual documents once the combined document is uploaded.
4. Confirm that all lab results have been received, and make them all visible in the patient's portal.

- a. Create LabCorp BC Report. (Reference Create BC Reports)
- b. If all lab results have not been received, log in to each lab with the credentials listed on the Vendor List and Credentials and check to see if the patient's results are available.
 - i. If yes, download them to the Dropbox: Patient Coordination>Labs for the EHR and then upload to the patient's chart. (Reference Upload Lab Results into the EHR)
 - ii. If not, leave a sticky note in the patient's chart to tell the practitioner that there are no samples at the lab.
5. In the green SOAP/Encounter Notes section, click the "+" to start a new encounter note.
6. Title: Case Review ([practitioner's initials]).
7. Click the calendar square to change the date of the encounter to the appointment date.
8. Note categorization: Office Visit.
9. Click the "+" to add the appropriate charge ("Case Review (practitioner initials)") to the Charges box.
10. Save and close note (do not "save & sign").
11. Close the chart.
12. Repeat for each patient.