

Chart Prep for Initial Consults

PURPOSE

1. Admin staff prepares Initials Consults data and patient charts for clinicians.
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 patient has all required paperwork completed.

PROCEDURE

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

1. Check MD HQ schedule to see Initial Consult appointments for the next week.
2. Open patient chart.
3. Check to see if patient has completed PG & IC. If not, send message to patient in portal to remind them to complete this.
4. In the green SOAP/Encounter Notes section, click the "+" to start a new encounter note.
5. Title: Initial Consult ([*clinician's initials*]).
6. Click the calendar square to change the date of the encounter to the appointment date.
7. Note categorization: based on the appointment type. Examples below:
 - a. Phone Call: For all phone appointments.
 - b. Video Consult: For all Chiron video appointments.
8. Click the "+" to add the appropriate charge ("IC (Phone)" or "IC (Video)") to the Charges box. Be sure to choose the charge with the initials of the clinician who will be doing the appointment.
9. Save and close note (do not "save & sign").
10. Close the chart.
11. Repeat for each patient.