

Chart Prep Checklist

- Check that superbill and chart match in name and Date of Birth (for paper charts)
- Verify that the particular provider can provide that type of visit
- Verify that the provider is the PCP
- Put a clean soap note in the chart for all non-well visits (for paper charts)
- Check to make sure that the health Hx questionnaire on the Left side of the chart is complete
- Read the visit notes from the last few visits to see if any labs, lab results or diagnostic test results will be needed for the visit (if so be sure they were done and then get the report or results now instead of waiting)
- Be sure a signed HIPAA for is in the chart

For Pediatrics (under age 18):

- Be sure that pediatric charts have a signed 'consent to treat' which is signed in both spots on the left side of chart
- Check to be sure the correct Health Supervision Summary is in the chart (with patient's name and dob on it)
- Check to see if the child is due for a well exam, if so, try to schedule it when you call to remind of appointment or if child isn't very sick and well exam is due, try to combine appointments
- Check to see if child is due for vaccines, if so, make note—If you are unsure if child has had varicella, ask when you call and either document a positive history or indicate that they are due. Attach appropriate vaccine consent forms.
- Be sure that the correct growth chart and health supervision summary is in the chart
- For adolescents (above age 12) place a behavioral questionnaire in the chart for each visit (unless you see on the health supervision summary that the provider has talked to them about high risk behavior in the past 12 months.
- Additional details if the patient is coming in for a Well Exam:
- Put exam form in chart and be sure that all past Well exams are noted and dated on Health Supervision Summary. If the child could possibly be school age, attach the blue school form.
- Place the appropriate behavioral questionnaires, lead screening, etc., in the chart and make note of it.

For Adults (over age 18):

- Check to make sure that Health Maintenance Checklist is completed and that
 - BMI has been done in the last 12 months (if not, make note to check height at this visit).
- Be sure that patient has documented hx of Tetanus vaccine in the past 10 years
- Review the problem list looking for chronic diseases which may need follow up (HTN, depression, DM, abnormal paps, etc.)
- If the patient is a diabetic, order a glucose fingerstick.
- If the patient is a female, review chart to see if she is using birth control or is sexually active. If she is using birth control, be sure that a signed consent is in chart (depo and bcp's) and if she is due to get more pills etc, make note of this.
- If the patient is over 65 years, be sure that they have completed a geriatric questionnaire in the last 12 months.
- If they are over 65, check to be sure that they have had Pneumovax vaccine in the past 5 years
- If patient hasn't had a depression screening questionnaire, put that in the chart
- If the patient is here for an Annual Exam, put appropriate papers in the chart including the annual form, the history questionnaire, the Breast Self-Exam (BSE) card, the cytology form and the lab slip.