

Approved By:	Board of Directors	Adopted Date:	01/11
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#### PURPOSE:

To describe the required documentation and timeliness of documentation standards for services provided by Open Door Community Health Centers (ODCHC) practitioners to ensure timely, quality patient care and billing.

#### DEFINITIONS:

**Open Encounter:** Documentation of a patient encounter or service that has not been completed and signed off by the rendering practitioner.

#### POLICY:

ODCHC practitioners are responsible for timely completion of documentation related to patient visits, in order to allow patient prescriptions, referrals, diagnostic studies and billing to be processed in a timely manner. It is expected that most clinical encounters will be documented and closed on the date of service. Clinical encounters that are open 72 hours or more after the date of service will be considered delinquent. After-hour calls that are not documented on the day received will be considered delinquent.

- All services by ODCHC practitioners must be documented in the EPIC electronic record system.
- Documentation made in EPIC must not be duplicated in paper or hardcopy (e.g., in the existing hardcopy medical record). Documentation made in EPIC must not be duplicated in electronic form, except in the case of disease- or service-specific databases adopted for use by ODCHC.
- No ODCHC practitioner will maintain patient documentation outside the EPIC system, except psychotherapy notes.
- Timeliness and completeness of clinical documentation is the responsibility of the Licensed Practitioner providing care. Monitoring timeliness of clinical documentation is the responsibility of the Compliance Officer (CO) and the Chief Medical Officer (CMO). Monitoring the quality of clinical documentation is the responsibility of Site Medical Directors (SMDs) and the ODCHC Peer Review Committee.
- Practitioners who provide care under supervision (e.g., nurses, advance practice practitioners, clinicians in training or on probation) must close completed encounters prior to routing them to their supervisor for review.
- Practitioners with delinquent open encounters will be offered additional training, tutoring, and/or one-on-one assistance.
- Practitioners who continue with delinquent open encounters after offers of the additional support outlined above, will be subject to increasingly severe disciplinary actions including:
  - Hands-on support from EPIC specialists to learn EPIC processes that may streamline their workflow. These will be coordinated with their Site Administrator (SA).
  - Mandatory discussion with a SMD regarding issues preventing chart closure.
  - Mandatory attendance at an off-hours Open Encounters workshop without additional compensation.
  - Reduction in the number of scheduled clinics, to allow for keeping current with open encounters. This will result in a subsequent reduction in pay.

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- Reduction in responsibilities, to allow for further focus on the timely closure of open encounters.
- Suspension without pay
- Termination of employment with ODCHC.
- At the discretion of the Chief Operations Officer and the CMO, repeated violations of this policy may result in suspension without pay or termination

The levels of support or discipline will be handled as per the following table:

Trigger for Support Assistance	Required % of Charts Closed	Support Services Provided	Disciplinary Action	Corrective Action Completed
Weekly report shows by 2 <sup>nd</sup> reporting period that required % of charts closed is not met	95% of charts closed within 72 hours, and/or less than 5 open charts at 8 weeks	One-on-one paired desktop support with a site specialist to support the process workflow	None	When 95% of charts are closed within 72 hours, as reported by weekly report
Weekly report shows by 4 <sup>th</sup> reporting period that required % of charts closed is not met	95% of charts closed within 72 hours, and/or less than 5 open charts at 8 weeks	Discussion with CMO regarding challenges to closure		When 95% of charts are closed within 72 hours, as reported by weekly report
Weekly report shows by 6 <sup>th</sup> reporting period that required % of charts closed is not met	95% of charts closed within 72 hours, and/or less than 5 open charts at 8 weeks	Mandatory attendance at an off-hours open encounters closure workshop, without additional compensation	Without additional compensation, attend the off-hours open encounters closure workshop. At the discretion of the Chief Operations Officer and the CMO, certain responsibilities outside of patient care may be removed from job duties. Reduction of the related stipend equal to the responsibilities removed.	When 95% of charts are closed in 72 hours, as reported by weekly report

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Weekly report shows by 8 <sup>th</sup> reporting period that required % of charts closed is not met	95% of charts closed within 72 hours, and/or less than 5 open charts at 8 weeks	A reduction by one in the number of scheduled clinics per week, by the Site Administrator, for purposes of allowing time for closing delinquent open encounters	Reduction in FTE status with a commensurate reduction in compensation equal to the number of clinic hours reduced	When 95% of charts are closed in 72 hours, as reported by weekly report
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**REFERENCES:**

None

**ASSOCIATED DOCUMENTS:**

OPS.073 Documentation of Medical Services (Retired)

CLN.039 After Hours Call

**KEYWORD TAGS:**

Documentation, guidelines, timeliness