

IntelleChartPRO End of Day Checklist – Clinical Team

Purpose

Following a clear closing process can ensure all clinical processes are resolved accurately and timely.

Process

All clinical staff should contribute to the completion of unresolved clinical procedures and prepare for the next day. The notification center should be utilized as a checklist.

Incomplete Charts	
Complete and sign all encounters created (Ensure charts are signed within 4 business days for timely electronic patient access to health information according to Promoting Interoperability requirements)	<input type="checkbox"/>
E-Rx	
Review Pharmacy Messages and respond appropriately (Rx Change Requests, Rx Cancellation Updates, Rx Renewals Awaiting)	<input type="checkbox"/>
Review any ePAs and respond appropriately (PA Needed, PA Submissions, PA Decision Received)	<input type="checkbox"/>
Providers – Review e-Rx Report to verify what was e-prescribed for the day with their credentials	<input type="checkbox"/>
Communications	
<u>Patient Communications</u> - Communication that needs to stay as part of the patient's electronic medical record. This can include patient triaging, medication refills, patient calls, questions, etc. Resolve communications by the end of day. <ul style="list-style-type: none"> o Individual vs team communications are identified by the format of notifications (incoming sent to specific user / incoming message sent to group that the user belongs to / outgoing message that has not been resolved) 	<input type="checkbox"/>
<u>Internal Communications</u> - Internal Communications are temporary messages that are entered to remind office staff of something that needs to be done for the patient. This type of communications should be deleted once resolved. They are not part of the patient's medical record. Ensure these are kept up to date by reviewing them daily and deleting them once they are resolved.	<input type="checkbox"/>
<u>Secure Messages</u> - Communication between patients and their providers via their patient portal. Only providers can reply to the patient via secure message to their patient portal, but techs can mark secure messages "Resolved" and document phone calls with the patient via Patient Communications if they are responsible for triaging some secure messages.	<input type="checkbox"/>
Open Referrals – Properly document all external referrals under "Outgoing Referrals" and send CCD to external provider.	<input type="checkbox"/>
Letters	
Ensure all letters are scheduled to fax and no failed faxes exist under "Pending Letters"	<input type="checkbox"/>
Billing	
Incomplete – Review all incomplete billing for the day to ensure all encounters have been billed out. (TIP: filter by location, DOS, provider initials)	<input type="checkbox"/>

Doc/Image Review	<input type="checkbox"/>
Documents that have been scanned in and marked as "Needs Review" assigned to a specific user/provider. This could also be a matched patient CCDA that needs to be reviewed and reconciled.	<input type="checkbox"/>