

## ***MEDICAL RECORD DOCUMENTATION STANDARDS***

Comprehensive, consistent and timely documentation in the patient medical record is an integral component of quality patient care. Blue Cross recognizes the importance of the patient medical record and has established minimum documentation and review standards as follows:

- 1. Page Identification:** Each page in the record contains the patient's name or ID number
- 2. Personal Biographical Data:** The patient's home address, employer, emergency contact name and telephone number, home and work telephone numbers and marital status.
- 3. Entries are dated:** All entries are dated with the month, day, and year.
- 4. Author Identification:** Every entry is to contain the author's signature, unique electronic identifier or initials, and their title.
- 5. Provider List:** All physicians and providers involved in the patient's care and information on services furnished by these healthcare providers.
- 6. Problem List:** Significant illnesses and medical and psychological conditions are listed and dated.
- 7. Presenting Complaints:** Presenting complaints, diagnoses, and treatment plans, including the services to be delivered.
- 8. Physical Findings:** Physical findings relevant to the visit including vital signs, normal and abnormal findings, and appropriate subjective and objective information.
- 9. Allergies and Adverse Reactions:** Information on allergies and adverse reactions (or a notation that the patient has no known allergies or history of adverse reactions).
- 10. Advance Directives:** Information on advance directives and/or a copy of the completed directive, if applicable.
- 11. Medical History:** Past medical history, including serious accidents, operations, illnesses, and for patient's 14 years old and older, substance abuse. For children and adolescents past medical history relates to prenatal care, birth, operations, and childhood illnesses.
- 12. Physical Exams, Treatments, Risk Factors:** Physical examinations, treatment necessary and possible risk factors for the member are relevant to the particular treatment.
- 13. Medications:** Prescribed medications, including dosages and dates of initial and/or refill prescriptions.

- 14. Tobacco, Alcohol, and Substance Abuse:** For patients 14 years and older, there is appropriate notation concerning the use of cigarettes, alcohol and substance abuse (including anticipatory guidance and health education).
- 15. Patient Caregiver or Assistant Information:** Information on the individuals to be instructed in assisting the patient.
- 16. Legibility, Dates, Signatures:** Medical records must be legible, dated, and signed by the physician, physician assistant, nurse practitioner, or nurse midwife providing patient care.
- 17. Immunization Record:** An immunization record for children is up-to-date or an appropriate history is in the medical record for adults.
- 18. Preventive Health Screening/Service:** Evidence of preventive screening and services in accordance with Blue Cross preventive health practice guidelines.
- 19. Referrals, consultations, test results:** Documentation of referrals, consultation reports, diagnostic test results and services, and behavioral health. Test results are to be initialed by the ordering physician to signify review. Notations of informing the patient of test results should be included.
- 20. Ancillary Services, Behavioral Health, and Inpatient Reports:** Records, reports, and discharge summaries for inpatient care, behavioral health care, and ancillary services, such as: home health, ambulatory surgery, skilled nursing, and physical/occupational/speech therapies.
- 21. Missed or Cancelled Appointments:** Notations of patient appointment cancellations or “No Shows” and the 3 attempts to contact the patient to re-schedule.
- 22. Procedure Risks:** No evidence that the patient is placed at inappropriate risk by a diagnostic or therapeutic procedure.
- 23. Interpreter Services:** Documentation on whether an interpreter was used, and, if so, that interpreter was also used in follow-up.