

IntelleChart PRO Tech Checklist	
Create A New Encounter	
Highlight the correct appointment from left hand column (if not already done)	<input type="checkbox"/>
Select the appointment type	<input type="checkbox"/>
Choose the appropriate profile	<input type="checkbox"/>
History	
Ensure correct technician initials in the box at the upper right corner	<input type="checkbox"/>
Reason for Visit/Other History (should include all current and previous ocular history)	<input type="checkbox"/>
HPI (need chief complaint <u>AND</u> four unique modifiers)	<input type="checkbox"/>
Mental Status Exam	<input type="checkbox"/>
LBS/A1c with date if possible (for diabetics)	<input type="checkbox"/>
Ocular Meds (don't forget to check the Systemic Medications Reviewed box)	<input type="checkbox"/>
PSFH/ROS	
Pertinent Medical History (includes all current and past systemic medical conditions)	<input type="checkbox"/>
Surgical History (add all systemic surgical history)	<input type="checkbox"/>
Systemic Medications (include dosages and schedule if possible)	<input type="checkbox"/>
Allergies (with reactions if known)	<input type="checkbox"/>
Family History (don't forget relationship to patient if known)	<input type="checkbox"/>
Social History (MIPS requirement Smoking/Tobacco recorded here)	<input type="checkbox"/>
ROS (use [Defaults] to ensure all systems are recorded and change necessary sections)	<input type="checkbox"/>
Ensure all boxes are checked off in section or check box next to section header when completed	<input type="checkbox"/>
V & P	
Visual Acuity	<input type="checkbox"/>
IOP (use the drop down to choose the method of measurement)	<input type="checkbox"/>
Dilation (confirm the appropriate eye(s) and drops have been selected)	<input type="checkbox"/>
Refractions (select +Spec Rx/+Soft CL/+RGP then type of refraction from drop down)	<input type="checkbox"/>
Special Testing (if necessary)	<input type="checkbox"/>
Exam	
External – "open" all sections evaluated and document any changes	<input type="checkbox"/>
SIGN the chart and SAVE & CLOSE if all documentation is accurate and complete Move the patient to the correct place in the Workflow	

IntelleChart PRO Scribe/Provider Checklist	
History	
Review CC/HPI, edit or add notes as necessary	<input type="checkbox"/>
V&P	
Sign off on/print any necessary refractions and click Bill Refraction button to drop code	<input type="checkbox"/>
Exam	
Anterior Segment – “open” all sections evaluated and document any changes	<input type="checkbox"/>
Posterior Segment (if dilated) – “open” all sections evaluated and document any changes	<input type="checkbox"/>
Utilize the +PL button to add any new diagnoses to the Impression	<input type="checkbox"/>
Complete and insert any necessary drawings	<input type="checkbox"/>
Diagnostics	
Order any necessary testing, choose location for the eyes tested and indicate diagnosis	<input type="checkbox"/>
Review any tests completed in the Images tab and embed in chart with camera button	<input type="checkbox"/>
Interpret testing in appropriate sections	<input type="checkbox"/>
Procedures	
Select Procedure, Location and Diagnosis	<input type="checkbox"/>
Obtain consent (if necessary)	<input type="checkbox"/>
Complete procedure note	<input type="checkbox"/>
Impression/Plan	
Input the Scribes initials to the right of this section (if appropriate)	<input type="checkbox"/>
Review diagnoses and add/make any necessary changes, re-order if required	<input type="checkbox"/>
Indicate the primary diagnosis (or diagnoses) by clicking the number to turn it BLUE	<input type="checkbox"/>
Enter a Plan associated with appropriate diagnoses, add Other Discussions if needed	<input type="checkbox"/>
Document Studies/Labs if ordered	<input type="checkbox"/>
Record any Referrals to outside Physicians	<input type="checkbox"/>
Specify Tech Instructions for next visit (if necessary)	<input type="checkbox"/>
Follow Up	
Indicate Provider, return interval, and exam type for next visit	<input type="checkbox"/>
Add any diagnostic testing for next visit ordered, if needed	<input type="checkbox"/>
Input additional follow ups if necessary (Procedures, Surgery, or another Physician)	<input type="checkbox"/>
Communicate information to appropriate staff member if needed (i.e Surgical Coordinator)	<input type="checkbox"/>
Review Ocular Meds, make any appropriate changes and eRx necessary medications	<input type="checkbox"/>
Letters	
Create and FAX Letter if necessary	<input type="checkbox"/>
Coding	
Select the exam code for the appropriate level of service	<input type="checkbox"/>
Confirm all appropriate diagnostic testing and procedure codes are displayed	<input type="checkbox"/>
Ensure that the diagnoses to be billed for the visit are attached to all codes	<input type="checkbox"/>
Select Coding Complete	<input type="checkbox"/>
Mark appropriate bubbles above coding for MIPS (Clinical Information, Education, Clinical Summary)	<input type="checkbox"/>
SIGN the chart and SAVE & CLOSE if all documentation is accurate and complete SAVE & CLOSE without SIGNING if more information is needed so chart will enter INCOMPLETE CHARTS Move the patient to the correct place in the Workflow	