IntelleChart PRO Chart Prep Checklist

Create A New Encounter

Choose Prepped Chart as the appointment type	☐
Change the date to match the last exam in previous EMR/paper chart	☐
Select the doctor that saw the patient at their last visit	☐

History

Add all diagnoses and past surgeries to Other Hx using the search bar to tie them to ICD10	☐
Input all Ocular Meds prescribed or taking at last exam	☐

PSFH/ROS

Pertinent Medical History (includes all current and past systemic medical conditions)	☐
Surgical History (add all systemic surgical history)	☐
Systemic Medications (include dosages and schedule if possible)	☐
Allergies (with reactions)	☐
Family History (don't forget relationship to patient)	☐
Social History (MIPS requirement Smoking/Tobacco recorded here)	☐
ROS (use [Defaults] to ensure all systems are recorded and change necessary sections)	☐

V & P

Visual Acuity	☐
IOP (use the drop down to choose the method of measurement)	☐
Dilation (confirm the appropriate eye(s) and drops have been selected)	☐
Refractions (select +Spec Rx/+Soft CL/+RGP then type of refraction from drop down)	☐

Exam

External (document any abnormal findings and default all sections)	☐
Anterior Segment (document any abnormal findings and default all sections)	☐
Posterior Segment (document any abnormal findings and default all sections)	☐

REMEMBER TO ALWAYS LOCK PREPPED CHARTS WHEN FINISHED