

**Title:** ICP – Charting Checklist

**Page Number:** page 1 of 2

**Document Date:** 6/1/2020

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## Purpose

Provide all clinical users with a comprehensive list of all items that should be completed within ICP before the chart is signed.

- Verify all required history components are completed
  - Reason for Visit
  - Past Ocular History
  - History of Present Illness (HPI)
  - Past Systemic History
  - Surgical History
  - Family History
  - Social History
  - Medication Reconciliation
  - Review of Systems
  - Ancillary Testing (ex. Stereo, Color, Amsler Grid)
  - Visual Acuity
  - Intraocular Pressure
  - Dilation
  - Refractions
  - Pupil Gauging and Reaction
  - Confrontational Visual Fields
  - Motility
  - Ocular Alignment
- Ensure all reporting measures have been properly documented (ex. Diabetes, POAG, AMD, vaccinations, fall risk, smoker education, etc.)
- Verify all exam findings are documented properly (no contradictory defaults)
- Review all diagnostics interpretations. Ensure there is a medical necessity, reason for testing, diagnostic interpretation, and linking diagnosis
- Document any procedures performed
  - Procedure notes
  - Procedure preps
  - Procedure anesthesia administered
  - Procedure consents acquired and on-file
- Review impression and plan are completed with:
  - Proper diagnosis with ICD-10
  - Treatment plan and recommendations
  - Warning signs and symptoms
  - Plan of action

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**Page Number:** page 2 of 2

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- Return visit orders for anticipated exams, diagnostics, procedures (for scheduling and insurance prior authorization)
- ☑ Document any outgoing referrals, labs, imaging requested
- ☑ Prescribe/Refill Medications
- ☑ Ensure all services rendered have been coded/billed
- ☑ Send letters and document communication to co-managing doctors

#### Revision History

Revision	Date	Changes	Requested By
V001	6/1/2020	Initial Release	