

Unison Health Plan
MEDICAL RECORDKEEPING REVIEW
Score required to pass is 80% and above.

Practitioner Name:

Location:

County:

TYPE OF REVIEW: **CRED**____ **NEW SITE**_____

Reviewer:

Title:

Date:

Unison Health Plan

PRACTITIONER MEDICAL RECORDKEEPING REVIEW

Practitioner Name:

Practitioner Address:

CRITERIA	DESCRIPTION OF CRITERIA	YES	NO	N/A	WGT	COMMENTS
1. Chart Identification	Charts are easily accessible by numerical or alphabetical order. If charts are filed by family then each member should have a separate chart with in the family chart				10	
1.1 Individual or Family	Document in comment section the system used.					
2. Demographic Sheet:						
2.1 Patient Name	First and last name should be present				5	
2.2 Address	Address where patient can be reached by mailings				2	
2.3 Phone Number	Patient phone number or contact person if patient does not have a phone.				2	
2.4 Birthdate/age	Patient date of birth and age should be noted				5	
2.5 Emergency contact name and phone number	Person who in an emergency can be contacted.				2	
2.6 Employer name and phone number	Employer name and phone number should be listed. If n/a this should be noted.				0	
2.7 Marital status	Marital status should be noted.				0	
2.8 Sex/gender	Patient sex/gender should be noted				0	
2.9 Consent to treat	Section to house the consent for treatment				0	
2.10 Authorization to disclose	Section to house any releases of information				0	
4. Medication List	Designated area of medical record where maintenance type medications are noted.				10	
5. Allergies	Area on chart, preferably front sheet or cover of chart where allergies can be noted. If no allergies must document NKA.				10	
6. Progress Notes						
6.1 Legibility	Record is legible to someone other than the writer				10	
6.2 Date	All entries are dated.				5	
6.3 Signature	Each entry contains author's identification. It may be handwritten, initialed or electronic.				5	
7. History	There should be a section in medical record that identifies History both, physical and behavioral health				5	
8. Diagnostic Testing	Laboratory, x-rays and consults should be separated from progress notes.				5	
9. Preventive Health	Area should be present to address preventive health issue:				5	
10. Advanced Directive	Area on chart to address advance directive should be present on charts of patients 65 years and older. Pediatricians and OB/GYN are N/A				5	
11. Confidentiality of records	Records are stored in a confidential manner away from public access.				10	
TOTAL					96	
SCORE						
						0%

SIGNATURE: _____

DATE: _____

Unison Health Plan
PRACTITIONER MEDICAL RECORDKEEPING REVIEW

SCORE: 0%

Provider Name:
Location:
Comments:

Reviewer:

Documentation appears to meet Plan Standards Yes _____ No _____

If No, explain:

Recommended Action Plan:

Medical Director Signature

Date