TOTAL ACCESS URGENT CARE

Chart Check Checklist

Setup:

1. In DocuTAP, go to Reports > Schedule > Clinic. Complete the filter for the correct location and the previous day. Print this report for the list of patients.
2. Complete each chart check, patient-by-patient. If everything is correct, leave a checkmark. If something is wrong, fix it. Then document the errors and who made the mistake.
3. Once completed, scan to “Lead Reg.”

Quick Checklist:

1. Payments Screen:
    a. Confirm initials in check-in & check-out fields
        i. If there are no initials listed, type “NO INITIALS…[your initials].” Then click save.
    b. Copay is collected or explanatory notes
2. Scanning & Labeling:
    a. Confirm all the files are scanned and labeled correctly along with initials as needed
        i. Photo ID, Insurance Card (or Self Pay), Intake form, HIPAA, HX (or HX Review), and Assessment form.
        ii. Identify forms missing patient name, date of visit, or correct information. For incomplete forms, leave a PM note to update during the next visit.
        iii. Work Comp Cases: Med Auth and RTW
    b. Clean up the document section if needed (move old files to “OLD DEMO”).
3. Demographics Screen:
    a. Confirm DocuTAP matches the Intake form (Address, Phone, SSN, DOB)
    b. Confirm the email is in both the Home and Confidential fields
    c. Guarantor (If the patient is a minor) – Open the guarantor’s chart from the child’s chart
        i. Ensure the address and phone number listed for the patient and guarantor match. If not, load the information listed for the guarantor into the child’s chart and save.
        ii. In the guarantor’s pop-up box, click “Copy Patient Info” so that the address, phone number, and email in both charts are the same.
        iii. Because the email is added during check-out, not having the emails on the guarantor is not considered a mistake for the original person. The person doing chart checks is responsible for ensuring the emails are copied to the guarantor.
4. Insurance Screen:
    a. Confirm the patient’s name is loaded as it appears on the insurance card.
    b. Confirm the insurance P.O. Box is loaded correctly. If the P.O. Box is incorrect, reload the insurance using the correct P.O. Box. Re-enter the copay and verify the insurance.
        i. Go to the “Payments” screen, click on the patient’s name, select the correct insurance, and confirm insurance does not say ”ZZZ.” Click “Save/Finalize.”
    c. Click the date on RTV to see “Green”. **If not green, verify insurance & update info if needed. If unable to verify, include an explanation in the “Notes.”**
    d. Confirm the correct insurance holder's name and date of birth is entered in the “Insured Info” field.
    e. Confirm phone number and address are populated. If not, click the “papers” icon.
    f. Confirm the correct copay is entered
5. Retail Sales Screen:
    a. Compare the information from the retail sheet (patient name, medication name, price, and date of visit) to this screen, and confirm the retail was processed correctly. If you identify any errors, send an IM to “Retail Errors”, including the PID and error found.