

NEW  
EVAL



# EMR: Required Fields in the First Visit Note in a Case

## Checklist

**--- VERY IMPORTANT ---**  
**---- EVERY VISIT ----**

You must complete these fields in the **Initial Visit Note** and in a **Follow up Re-evaluation Visit Note** (when transitioning a current patient's documentation into RevFlow mid-episode).

### S: Subjective

Current Problems > Problem List

- Problem
- Onset date
- Mechanism of onset

**\*\* in the O: Interventions > Notes tab**  
**\*\* MAKE SURE you enter the Caregiver Communication, the Place of Service, D/C Criteria, & the TIME IN & TIME OUT**

Note 10/19/2017 S: Subjective O: Systems Review O: Exam O: Interventions A: Evaluation P: Treatment Plan Charge Capture Medical Record	
Interventions   Post-Intervention Examination Post-Intervention Assessment Post-Intervention Treatment Plan	
Print List	
Movement Interventions Modalities Activity/Mobility Techniques Manual Techniques/Interventions Notes	
Name	Description
Caregiver/Staff communication	The caregiver is and will continue to be educated on the stated goals and has committed to consistent follow through to show improvements in the home exercise program.
HEP statement	
Place of service	Therapy services were provided at
Service time	Time in: Time out:

Red Flags

Medications

Safety Considerations

- Allergies
- Precautions

### A: Evaluation

**O: Interventions > Interventions > Notes - 5 lines (including time in/out)**

Candidacy for therapy services

Assessment **INCLUDE : (1) "Candidate" (2) your Ax statement, (3) why skilled tx required**

Diagnosis code(s) [enter this information prior to selecting charge codes for the visit] **edit, reorder, & text to PIC**

Goals/Rehab Potential

- Goals
- Rehab Potential **Good or Very Good only**

Medicare Functional Reporting (if tab is present)

- Current functional limitation code
- Current severity modifier
- Goal severity modifier
- Severity modifier justification

### P: Treatment Plan

Treatment Schedule

- Treatment frequency and duration

Planned Interventions [use text field OR procedure code selection option]

PQRS (if tab is present) **PLEASE LOOK AT THE YELLOW LINE just below the client's name for the Procedure Code to use in the Charge Capture tab and in the Treatment Plan tab**

- G-code for reporting and supporting clinical documentation

**For KY Medicaid, Straight Medicaid, EPSDT, and MPW - anything we get a PA for - you will need to align the POC date with the PA approval dates. In other words, whatever your PA date is, you will need to use as the POC date. We want our POC dates and PA dates to match. **\*\*FIRST - Click "Add Schedule" to add a line, and choose the frequency and duration** \*Then - Change the Plan of Care Start and Exp dates to match the PA -AFTER- it auto calculates \*D/C Plans - with an S - add in the bottom line**

**\*\* In Charge Capture screen: PUT ALL OF YOUR MINUTES in the Direct HANDS ON Treatment Minutes box. For all payor sources. (do not break it down in to hands on, not hands on, etc.)**

## For More Information

If you need more information about Medicare reporting in the RevFlow EMR, go to the **Library** on the BMS Resource Center.

Under BMS, expand the **RevFlow Provider Resources** folder and then click on the **QuickTopics** or **Tutorials** folder.

The screenshot shows the BMS Resource Center interface. On the left is a navigation sidebar with options like Home, Inbox, News, Library (highlighted), Calendar, Team, Training, To Do's, Reports, Manage, and Statistics. The main content area is titled 'Library' and shows a tree view of folders. The 'BMS' folder is expanded, showing '03 RevFlow Provider Resources' which is further expanded to show 'QuickTopics' and 'Tutorials' folders (both highlighted with orange boxes). On the right, the 'BMS' section displays a list of documents with columns for 'Feat', 'Type', 'Name', 'Modified', 'Rating', 'Views', and 'Location'. The first item is 'Required Fields in the First Note in a Case Checklist.pdf'.

Feat	Type	Name	Modified	Rating	Views	Location
★	PDF	Required Fields in the First Note in a Case Checklist.pdf	7/25/2014	★★★★★	37	
★	PDF	The Interventions Tab in the RevFlow EMR QuickTopic	6/30/2014	★★★★★	50	
★	PDF	Adding Procedure Codes to a Visit Note QuickTopic	7/20/2014	★★★★★	66	
★	PDF	Attaching a Scanned Document to a Non-Automated Output QT	12/11/2012	★★★★★	38	
★	PDF	Automated Visit Note Output Report Generation Process QuickTopic	3/18/2014	★★★★★	50	
★	PDF	Charge Capture: Code and Minute Rule Validation QuickTopic	6/27/2014	★★★★★	45	
★	PDF	CMS Required Advanced Beneficiary Notification QuickTopic	8/21/2014	★★★★★	68	
★	PDF	Comparison of the Medicare 8 Minute Rule and the Rule of 8s	8/22/2013	★★★★★	209	
★	PDF	Creating a Clinical Note QuickTopic	1/13/2014	★★★★★	110	
★	PDF	Creating an Addendum to a Finalized Clinical				

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