

Announcing a new practice management service for WSMA members!

Chart Review Service

It is unfortunate that many physicians' practices encounter operational problems related to coding and documentation errors, as those can be seriously damaging yet frequently go undetected until serious repercussions occur.

One solution is to perform periodic review of your coding and documentation, as a component of your practice's Compliance Program, to detect and correct errors, and ideally to prevent errors from occurring through ongoing monitoring and related education of physicians and staff.

The Washington State Medical Association (WSMA) has arranged to help you do just that. In response to requests from member physicians and their practice managers, the WSMA is pleased to offer this service, the *WSMA Chart Review Service*.

Here's how the process works: Your Practice's representative informs the Practice's physicians, other practitioners and any other parties within the Practice of the chart review to be conducted, and obtains any authorizations to proceed as the Practice leadership deems necessary.

The Practice and the WSMA execute a separate Business Associate Agreement that provides access and authority to the WSMA representative and designees to review patients' clinical information and associated chart documentation solely for the purpose of performing the WSMA Chart Review Service.

Chart Sampling

- The Practice representative (or designee) and the WSMA representative (or designee) will mutually agree upon the number and type of records to be reviewed.
- The records reviewed should not include "nurse visits," that is, services performed primarily by a nurse with minimal or no physician contact with the patient, nor should the sampling include "routine obstetrical visits."
- This compiled information also will include any forms and templates referenced in the chart such as the Health History Form or laboratory results.
- The Practice will provide the WSMA with copies of the materials described above from those charts selected for the sample. Those copies will be provided to the WSMA either via fax or via mail. Electronic transmission, such as e-mail, will not be used, given the absence of secure electronic transmission capabilities.

Per the Office of Inspector General (OIG) *Compliance Program for Individual and Small Group Physician Practices* a randomly selected number of medical records could be reviewed to ensure that the coding was performed accurately.

Although there is no set formula to how many medical records should be reviewed, the OIG recommends five or more medical records per Federal payor (*i.e.*, Medicare, Medicaid), or five to ten medical records per physician. Of course, the larger the sample size, the larger the comfort level the Practice's clinicians and leadership will have about the results.

WSMA Chart Review Service

Deliverables

The WSMA will arrange to conduct a review of chart documentation from those records as mutually upon by the Practice and the WSMA. The Reviewer will:

1. Compare their determinations of the appropriate codes from the charts provided against the codes selected by the physician or other practitioner.
2. Provide a written report of the Reviewer's findings, including recommendations for corrections as needed to those codes that were selected by the physician or other practitioner, and offer guidance on documentation requirements where indicated.
3. Discuss with those selected physicians and other practitioners the results of the review in a manner and format that is mutually agreeable to the Practice and the WSMA. Other physicians, practitioners and administrative staff associated with the Practice also may participate in that exchange, as mutually agreeable to the Practice and the WSMA. Ideally these discussions should occur via remote access such as teleconference or web meeting to minimize costs and disruptions to the practice schedule.

The Practice agrees that the Reviewer's spreadsheets and other materials are proprietary in nature and therefore may not be shared with any parties external to the Practice.

Post-Review Activities

Information gathered by the Reviewer can be used to identify progress by the selected physicians and other practitioners in improving their chart documentation and related goals of achieving greater accuracy, including "under-coding," "over-coding" and "under-documentation".

The Reviewer may be available to conduct on-site or web-based targeted education programs for the Practice at a cost to be determined by the Practice and the WSMA.

Cost

As a WSMA membership benefit, charges for the *WSMA Chart Review Service* are highly price competitive:

- \$45 per Date of Service – E/M only or E/M with minor procedure
- \$65 per Date of Service – Procedure & Major procedure(s)
- Web-based and Onsite Education – individually arranged

Targeted Education Program

A targeted educational program can be provided at a cost to be mutually agreed upon by the Practice and the WSMA, based upon the scope of the program content, and in a mutually agreeable format. Costs associated with on-site training sessions, such travel expenses, also may be imposed.

Timeframe

The Practice and the WSMA will mutually agree upon the timeframe for the performance of the review and the post-review activities. The Practice's identification of the charts to be reviewed and its providing the WSMA with the materials to be reviewed will influence the timeline for the completion of this service.

Scheduling

To schedule your practice for this service or for further questions, please contact Michelle M. Lott, CPC, CPMA at the Washington State Medical Association:

- By phone: 206.441.9762, 1.800.552.0612 (206.956.3637 – direct) **or**
- By e-mail: mml@wsma.org.

Thank you for your interest in this service for WSMA members!