



# PBI Medical Record Keeping Course

IN JOINT PROVIDERSHIP WITH THE UNIVERSITY OF  
CALIFORNIA, IRVINE SCHOOL OF MEDICINE  
OFFICE OF CONTINUING MEDICAL EDUCATION



**17 CME CREDIT HOURS COURSE\***

APPROVED FOR *AMA PRA CATEGORY 1 CREDITS™*

**MR-17 EXTENDED TO 30 CME CREDIT HOURS\***  
EXTENDED WEEKLY, RELAPSE PREVENTION POST-COURSE  
TELECONFERENCES TO ELEVATE ACCOUNTABILITY AND MINIMIZE POTENTIAL  
FOR VIOLATION.

Produced by  
Professional Boundaries, Inc.

Faculty for this course is selected by PBI and approved by the University of California, Irvine School of Medicine Office of Continuing Medical Education

## Course Description

This course is designed for physicians who have the need or desire to improve their medical record keeping, which meets standards, laws, and regulations pertaining to medical documentation, for improved medical care, delivery of services, clear and accurate communications. It is specifically developed for physicians who have been found deficient in medical documentation either by hospitals or by regulatory boards.

## Course Objectives

**Upon completion, physicians will:**

- Understand and implement the regulations and laws regarding medical record keeping
- Improve documentation in support of appropriate billing codes
- Document with clarity to reduce misinterpretation and errors
- Provide improved documentation for risk management
- Apply improved skills for maintaining electronic medical records

## Course Schedule & Outline

**Pre-course component:** Students are provided eight medical records. Students review the medical records, evaluating for completeness, what other information they would like to know, whether the records are appropriate, and whether the records meet the necessary requirements for an adequate medical record.

**THE COURSE BEGINS EACH DAY AT 8:00 AM AND CONCLUDES EACH DAY AT 4:30 PM. ALL OTHER TIMES MAY VARY.**

**This course is designed to be an interactive course with specific objectives to accomplish within the designated time frame. Attendee participation is required throughout. In order to qualify for the 17 CME credit hours, attendees must be present and participating each day from 8:00 am to 4:30 pm. Please make travel arrangements accordingly.**

## **LIVE COURSE, Day 1:**

### **8:00 AM — 10:00 AM**

Introductions and course objectives

- Faculty Financial Disclosure

Principle of a Medical Board

- A discussion of the legal, medical, and economic rationale for medical records

The Requirements of Medical Records — PART 1

- Discussion and application of reason for the encounter and relevant history, physical examination findings and prior diagnostic test results;
- Discussion and application of an assessment, clinical impression, or diagnosis,
- Discussion and application of treatment objectives
- Discussion and application of integrated health plans
- Use of past medical records

### **10:00 AM — 10:15 AM**

BREAK

### **10:15 AM — NOON**

The Requirements of Medical Records — PART 2

- Justifications and documentation of rationale for treatment, including but not limited to testing, referrals, no treatment and the discharge
- The rationale for and results of diagnostic and other ancillary services should be included in the medical record
- Compliance and Non-Compliance
- Review of pre-work records
- Discussion/review of physician's records

### **NOON — 1:00 PM**

LUNCH

### **1:00 PM — 3:00 PM**

Chronic Pain - Requirements of Medical Records

- Documentation of problem-focused exam
- Documentation for a medical history and exam focused on pain
- Creating and documenting a treatment plan for pain
- The special needs of informed consent and patient education
- Pain contracts
- Documenting the use of narcotics

### **3:00 PM — 3:15 PM**

BREAK

### **3:15 PM — 4:00 PM**

Informed Consent / Patient Education

- When, why, and how informed consent is needed and documented

- How to document informed consent
- Patient education is a critical, undervalued
- Appropriate documentation

**4:00 PM — 4:30 PM**

Review of the pre-course chart assignment

**LIVE COURSE, Day 2:**

**8:00 AM — 10:00 AM**

Medical Records and Billing Records — PART 1

- Billing codes, including CPT and ICD-9-CM codes, reported on health insurance claim forms or billing statements, should be supported by the documentation in the medical record.

**10:00 AM — 10:15 AM**

BREAK

**10:15 AM — NOON**

Medical Records and Billing Records — PART 2

- Discussing and demonstrating the appropriate billing codes

**NOON — 1:00 PM**

LUNCH

**1:00 PM 2:45 PM**

Communicating with Patients and Appropriate Documentation

- Methods to communicate with patient and their families
- Benefits and dangers of electronic methods of communicating with patients
- How best to document patient communications
- How to get staff to appropriate document patient communications

Appropriate Release and Transfer of Medical Records

- Proper release of medical records
- Proper transfer of medical records
- Proper denial of release of medical records

**2:45 PM — 3:00 PM**

BREAK

**3:00 PM — 4:30 PM**

HIPAA

- What is HIPAA
- Confidentiality issues
- Security issues
- Documentation of HIPAA
- Consequences of HIPAA violations

Other Documentation Issues

- Dangerous drugs
- Narcotics
- Samples

Course Evaluation, Feedback, and Certificates of Completion

**4:30 PM**

ADJOURN

**--- EXTENDED EDITION - 13 ADDITIONAL CME CREDIT HOURS AVAILABLE ---**

**Professional Boundaries and Ethics Formula Introduction**

- Reading packet (30 minutes)
- Stratified Protection Plan written assignment (30 minutes)

**Teleconference Discussion**

- Telephonic faculty-led seminars (PBI Maintenance and Accountability Seminars): 12 hours (twelve 1-hour sessions)

## Accreditation Statement

This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Accreditation Council for Continuing Medical Education through the joint providership of the University of California, Irvine School of Medicine and Professional Boundaries, Inc. The University of California, Irvine School of Medicine is accredited by the ACCME to provide continuing medical education for physicians.

## Designation Statement

The University of California, Irvine School of Medicine designates these live activities each for a maximum of 30 *AMA PRA Category 1 Credits™*. Physicians should claim only the credit commensurate with the extent of their participation in activity.

## Disclosure Policy

It is the policy of the University of California, Irvine School of Medicine and the University of California CME Consortium to ensure balance, independence, objectivity and scientific rigor in all CME activities. Full disclosure of conflicts and conflict resolutions will be made prior to the activity in writing via handout materials, insert, or syllabus.

## California Assembly Bill 1195

This activity is in compliance with California Assembly Bill 1195, which requires continuing medical education activities with patient care components to include curriculum in the subjects of cultural and linguistic competency. For specific information regarding Bill 1195 and definitions of cultural and linguistic competency, please visit the CME website at [www.meded.uci.edu](http://www.meded.uci.edu).