

# Simplified Outpatient Documentation and Coding toolkit

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## How will this toolkit help me?

This toolkit will help you reduce your documentation and coding workload by:

- Describing the most recent billing and coding documentation guidelines
- Illustrating workflow solutions for more efficient documentation
- Providing examples of documentation to help educate physicians and their teams

## Introduction



Physicians and supporting team members in medical practices are experiencing burnout at an unsustainable rate. An unmanageable workload, in large part due to the electronic health record (EHR) documentation burden, contributes to physician burnout. Furthermore, a physician sitting at a computer performing the clerical task of data entry and note-taking is a low-value use of a high-dollar resource.

Physicians and advocacy groups have been asking to reduce regulatory requirements for less-meaningful work for the past decade. In recent years, there have been 2 major favorable changes in regulation to decrease documentation burden and redundancy for physicians during ambulatory visits:

1. January 1, 2019 (PDF): allowing ancillary staff members to document certain parts of the clinical note that physicians can then review and verify, rather than independently re-document<sup>1</sup>
2. January 1, 2021: changing level of service (LOS) codes to only depend on medical decision-making or time, not history or physical exam elements<sup>2</sup>

These changes recognized duplication in data collection and recording, helped clarify billing rules, and removed specialty-specific challenges created by the previous guidelines that had been in use for a quarter of a century. While it seemed intimidating to many physicians to understand yet another set of rules, most practicing clinicians agree that these changes "made sense" and made their lives easier because no substantial requirements were added, and many requirements were removed.

## Access the complete toolkit

Learn how to optimize documentation and coding strategies in just 4 STEPS with the complete toolkit PDF.

### Clinical vignette packet

Use this packet (PDF) of all 5 clinical vignettes from the STEPS Forward® Simplified Documentation and Coding toolkit during in-person training sessions.

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