

IHA Care Management Chart Audit Tool

Patient Name:

DOB:

Reviewer:

Question	Weight	Answer	Score	Comments	Overall %age
Was patient enrolled in CM properly	1				
Correct Location/Md Selected	1				
Enrollment billed	1				
Provider Interaction= SBAR	1				
Are components for Care Team Included	1				
Type of call = billing type	1				
Length of call(s)= billing time	1				
Pertinent Dx codes used	1				
Appropriate TOC or CA used	1				
Is Plan/Intervention screen used properly	1				
Medication Reconciliation documented within 72 hours of enrollment	1				
Was PAM completed on call 1	1				
Were goals set according to PAM level/Diagnosis	1				
Were subsequent PAM completed timely	1				
Documentation supports goals	1				
Patient Issues/Concerns= SMART goals	1				
Goals are active and updated appropriately	1				
Is specific disease education documented in notes	1				
Documentation Saved	1				
Was PHQ2/PHQ9 completed appropriately	1				
Is Caregiver support documented					
Summary generated	1				
Insurance slid over	1				
Charges submitted	1				
Symptoms identified and follow up appropriate/timely	1				
Was Health maintenance reviewed and appropriate actions take	1				
Evidence of appropriate coordination with outside providers as needed	1				
Appropriate referrals/resources provided during call	1				
Advanced Directives discussed	1				

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