



## PBI Medical Record Keeping Course

IN JOINT PROVIDERSHIP WITH THE UNIVERSITY OF  
CALIFORNIA, IRVINE SCHOOL OF MEDICINE



**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  
PBI Education, a trade name of 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 professionals 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, and clear and accurate communications. It is specifically developed for professionals who have been found deficient in medical documentation either by hospitals or by regulatory agencies.

## Course Objectives

**Upon completion, clinicians should be able to:**

- Describe how to maintain compliance with laws regarding medical record keeping
- Improve documentation in support of appropriate billing codes, regulations, and expectations
- Document with clarity to reduce misinterpretation and errors
- Provide improved documentation for risk management
- Apply improved skills for maintaining electronic medical records
- Create and implement a Personalized Protection Plan that includes strategies, safeguards, and systems to reduce the risk of relapse and improve accountability

## Course Schedule & Outline

**THE COURSE BEGINS EACH DAY AT 8:30 AM AND CONCLUDES EACH DAY AT 5:00 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. Participation in discussions is required throughout. In order to qualify for the CME credit hours, attendees must be present and participating for the full duration of the course. Lunch and break times may vary as needed. Please make arrangements accordingly.**

## **PRE-COURSE ASSIGNMENTS**

- 3 hours of pre-course reading and written assignments submitted prior to the course
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### **DAY ONE**

#### **8:30am to 9:00am**

Introduction, Goals, and Objective

- Check-in and confidentiality
- Review of ACCME protocols and UCI CME accreditation
- Faculty financial disclosure
- Faculty introduction
- Defining the objective and goals for the course

#### **9:00am to 9:15am**

- Participants introduction and background
- Identifying participants course goals

#### **9:15am to 9:45am**

- Identification of the purpose of the medical record
- Rules to understand medical records
- Identification and understanding regulations on medical records

#### **9:45am to 10:30am**

- Defining and exploring SOAP
- Contemporaneous records and what that means
- Strategies for contemporaneous records
- Case studies

#### **10:30am to 10:45am - Break**

#### **10:45am to 11:15am**

- Legibility of records and what that means
- Strategies for legible records
- Case studies

#### **11:15am to 12:00pm**

- Defining complete medical records
- Principles and identification tools for complete records
- Critical principles of medical justification and documenting justification
- Reviews of systems
- Case studies

#### **12:00pm to 1:00pm - Lunch**

#### **1:00pm to 3:00pm**

- Check-in

- History of present illness
- Relevant histories
- Keys and pitfalls when documenting physical exams
- Documenting labs, diagnostics, consulting
- Documenting follow-up, patient communication, and education
- Informed consent
- Case studies

**3:00pm to 3:15pm - Break**

**3:15pm to 5:00pm**

- Discuss chaperones and the documentation of chaperones, family, friends, and staff
- Documentation of past medical records
- Documentation of requests for past medical records
- Documentation of treatment progress
- Document of non-compliance
- Documentation of treatment plans
- Case studies

**DAY TWO**

**8:30am to 10:30am**

- Check-in
- Documentation of prescription and samples
- Corrections and making amends to medical records
- Documentation of patient communication and follow-up
- Role of communication policies
- Documentation by clinical and non-clinical staff
- Pitfalls of EMRs and strategies to help
- Case studies

**10:30am to 10:45am - Break**

**10:45am to 12:00pm**

- Exploring rules and regulations regarding controlled substances and chronic pain
- Documenting do's and don'ts for controlled substances
- Keys to documenting functionality and sound clinical judgment
- Informed consent and controlled substance agreements
- Case Studies

**12:00pm to 1:00pm - Lunch**

**1:00pm to 2:00pm**

- Check-in
- Drug testing and documentation
- Documentation of prescription monitoring program
- Saying "no" and documenting those decisions
- Limiting care or terminating patients and documenting it properly
- Case studies

**2:00pm to 3:00pm**

- How to document patient education
- Do's and don'ts of informed consent
- Keys to understanding HIPAA and appropriate documentation

**3:00pm to 3:15pm - Break****3:15pm to 5:00pm**

- Creating and implementing a Personalized Protection Plan©
- Integrating course material and discussion into a Personalized Protection Plan
- Final Exam – Oral presentation of your Personalized Protection Plan
- Feedback from class and faculty

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

- Professional Boundaries and Ethics Formula Introduction
  - Reading packet (30 minutes)
  - Personalized 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 for a maximum of 30 *AMA PRA Category 1 Credits*<sup>™</sup>. 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/cme](http://www.meded.uci.edu/cme)