**Chart Preparation**

1. □ Preparation can be done the day before ideally, prior to the start of clinic
2. □ Read about potential diagnoses prior to the visit
3. □ Note who PCP is, and review last visit, labs and problem list
4. □ Review any new hospital summary, ED reports, imaging and diagnostic studies (biopsy,etc.)
5. □ Merge chronic problems from previous visits if able such as: DM, HTN, CKD, COPD, Asthma, CHF regardless of the episodic complaint

**Basic Workflow**

1. □ Enter room, introduce yourself and state your role
2. □ Wash hands-make eye contact, position computer to make eye contact
3. □ Skim chart MA history, positive screens (depression, anxiety, ETOH)
4. □ Set agenda with patient if indicated-what is their greatest concern about their health
5. □ Medication reconciliation
6. □ Review the vitals
7. □ HPI-read what may have been documented by medical assistant
8. □ Populate EXAM on the EHR if possible
9. □ Clean stethoscope-wash hands-put on gloves if patient is sick
10. □ Perform exam and share results with patient and update exam if populated-wash hands again
11. □ Diagnosis – add diagnoses and justify your plan. Read the article on Better Charting
12. □ Discuss in an organized sequence your findings and plan with your preceptor
13. □ Summarize plan with patient and when you will follow up with the patient
14. □ Enter billing code and close note
15. □ Communicate with staff what is pending