



## NAMAS Weekly Auditing & Compliance Tips

November 4, 2016

### The "APSO" Note: Changes and Challenges with the Modern Patient Record

Thirty years before the first set of evaluation and management, or E&M guidelines was released, Dr. Lawrence Weed developed a format for the improvement of what was then a segmented medical record into a problem-oriented medical record for patients. This format evolved into the "SOAP" note, representing an acronym for Subjective (history), Objective (physical examination), Assessment and Plan. Since introducing this format to a wider audience in 1968, the SOAP note has become the standard for the documentation of physician encounters.

The advent of Electronic Medical Records, coupled with a new generation of tech-savvy physicians, has brought changes to Dr. Weed's original format. The latest modification is the "APSO" Note, in which the Assessment and Plan is placed at the beginning of E&M encounter documentation. Younger physicians, particularly in the hospital environment, have embraced this method as a way for subsequent providers on a case to avoid reviewing clinical information collected by previous providers in order to diagnose the patient.

When asked about this development, Dr. Weed, now in his 90s, stated that the "APSO" note format transforms the documentation to "provider-centered rather than patient-centered" and places "opinion before the facts". Despite his objections, larger EMR vendors are now designing templates that put a premium on quick access to the assessment and plan.



As a NAMAS member, you'll receive access to monthly webinars for CEUs (including those hard to find CPMA CEUs!), a subscription to BC Advantage magazine, discounts on products and NAMAS training events, and much, much more!

We offer 4 membership levels- choose the one that best suits your needs!

**Click Here to View NAMAS Membership Levels and Benefits**

For added convenience, NAMAS accepts PayPal, PayPal Credit, quarterly and monthly payments of membership dues.

From an auditing perspective, a design that simplifies the physician's process modifies the tasks of the auditor. As auditors, we have been conditioned to perform audits of documentation in its traditional order of history, examination and medical decision making / assessment and plan. Yet despite a variation in recognized order of documentation elements, the auditor's task remains the same.

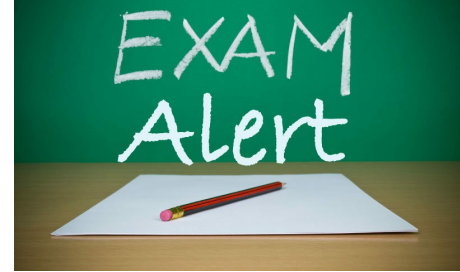
In the format of the provider's choosing, the documentation of any E/M service must have clear documentation of a chief complaint, history, examination, and clear documentation of a physician thought process that focuses on the conditions assessed during the visit.

In one way, the APSO note makes the job of the auditor easier. When documentation begins with the plan of care for conditions assessed during the visit, auditing becomes less about discovery of facts from a clean slate, and more of a forensic investigation to find if the remainder of the documentation fits the conclusions reached by the physician.

In most APSO notes, the history of present illness (or H.P.I) is shown either just below or intermingled with the assessment and plan. From an auditing perspective, this placement offers advantages beyond the simple counting of bullet points. In this format, connections can be more easily made between the narratives of the patient and the provider. Conditions assessed should readily appear as part of the HPI. If it is not, the review of systems and examination of the patient should make it apparent that the problem was first brought forward and assessed during that visit.

The above is also true when determining ICD-10 diagnoses to be included on a claim submission. If a condition was not meaningfully assessed from patient interaction during the visit audited, and the assessment and plan of care only references the condition in passing, with no changes to the treatment regimen, it would stand to reason that this condition was not the primary focus of the visit. The decision whether or not to include the diagnosis on a claim then becomes an easy one.

As with any other audited chart from an electronic medical record, the value of the content of the documentation will be directly proportional to the comfort level of the provider entering the information. Whether it is a "SOAP" note or an "APSO" note, hovering over both are the E/M Guidelines, which show no signs of changing after twenty years of existence. While physicians can be educated on deficiencies with regard to documentation and (possibly) coding, the format of the note should be left up to the physician. In the end, the documentation must serve the continuing medical needs of the patient, and reflect the



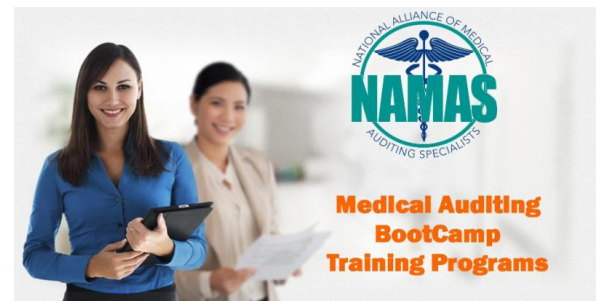
## Take the CPMA Exam During Our Annual Conference

Great news! NAMAS will be offering our **Medical Auditing BootCamp** December 5-6 during our annual conference. We will also be hosting the

**AAPC CPMA Exam** on Wednesday, December 7 from 7:30am - 12:45pm at the Loews Portofino Bay Hotel

Package rates will be offered for those interested in attending the Medical Auditing BootCamp in addition to our 8th Annual Auditing & Compliance Conference. Email [namas@namas.co](mailto:namas@namas.co) for details.

To register to take the CPMA exam, click the image above and use the following index number to register:  
CCTN1-E10038



Our onsite or online training program will not only prepare you to sit for the medical auditing certification test, but will prepare you for a career as a medical auditor.

As a bootcamp attendee, you will receive the NAMAS Auditor's Resource & Prep Guide, 16 AAPC CEUs, AND a 1 year NAMAS membership!

Our next **onsite** bootcamp will be:

thought process of the physician providing care.

## This Week's Audit Tip Written By:

### J. Paul Spencer, CPC, COC

J. Paul Spencer is an Auditing Specialist for our parent organization, DoctorsManagement

December 5-6: Orlando, FL

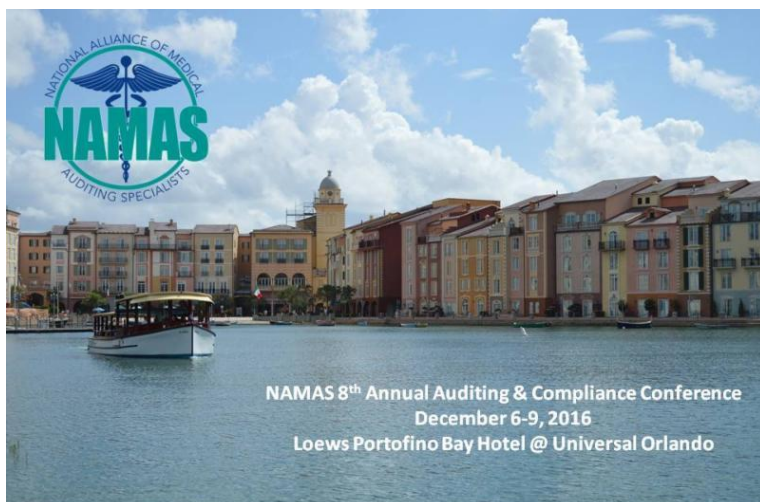
We've also added additional **online** Saturday classes to our calendar

**Click Here to Learn More About The NAMAS Medical Auditing BootCamp**



## 8<sup>TH</sup> ANNUAL Auditing & Compliance CONFERENCE 2016

Join us in beautiful Orlando, FL for the **NAMAS 8th Annual Auditing & Compliance Conference**



**Dates:** Pre-Conference: Tuesday, December 6, 2016  
Conference: Wednesday, December 7- Friday  
December 9, 2016

**Venue:** Loews Portofino Bay Hotel, Orlando, FL

This is the **ONLY** conference designed for medical auditors and compliance professionals!

**Earn Over 20 AAPC CEUs** good toward Core A, CPMA, CPCO & CEMC certifications

Where better to be in December than in beautiful Orlando, Florida learning from the best in the business, networking with your peers, and **earning over 20 AAPC CEUs?**

There's more good news! **NEW FOR 2016-** we've partnered with RACmonitor to provide a **FACILITY**

### NAMAS E/M Auditing BootCamp



For those with a basic foundation of E&M auditing, or experienced E&M auditors just looking for a refresher, our 1-day E&M Auditing BootCamp is for you!

MDM? Medical Necessity? Guidelines? Audit Policies? We'll cover all of this AND more in this training program

Attend our next onsite session:

November 17, 2016: Columbus, OH

**Click Here to Learn More About The NAMAS E&M Auditing BootCamp**

### Weekly Tip Sponsor



Exclusion Screening offers a all-in-one service that checks and verifies all your employees, contractors, and vendors for you.

Visit Exclusion Screening during the NAMAS

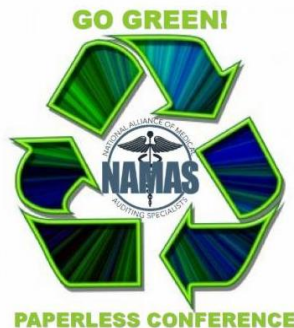
**AUDITING track** during both pre-conference and conference!

# RACmonitor

Attendees can select their pre-conference and conference sessions from any one of the following tracks: Physician-Based Auditing, E&M Auditing, Facility-Based Auditing, and Physician- Based Compliance!

## Our 8th Annual Conference Has Gone Green!

We're proud to be a paperless conference, offering attendees the opportunity to download their session handouts electronically prior to conference



**Don't delay in registering- Lock in your conference rate with only a \$50 deposit!**

[Click Here to View the Conference Agenda](#)

[Register Now](#)

## NAMAS Conference Speaker Spotlight

### Speaker Spotlight

Meet our speakers for the



**Sandy Routhier,**  
RHIA, CCS, CDIP

HIM & Coding Consultant  
Panacea Healthcare Solutions

**Conference Sessions:**

What is the Focus

8th Annual Auditing & Compliance  
Conference December 7-9, 2016 in Orlando,  
FL

## NAMAS Calendar of Events



Click the image above to view our monthly calendar

## Upcoming Webinars

NAMAS is proud to present the following webinars in November



### Auditing Rural Health Services

Speaker: Cathy Bowden  
November 8, 2016  
2pm EST

### E&M Encounter Review

Speaker TBD  
November 15, 2016  
2pm EST

### The 2016 OIG Target List Update

Speaker: Robert Liles  
November 22, 2016  
2pm EST

NAMAS Members: Watch your Email for  
Registration Links

Non-Members: Email [namas@namas.co](mailto:namas@namas.co) to  
learn how to attend these webinars

[Discover](#)

**NAMAS 8th Annual  
Auditing & Compliance  
Conference**

December 6-9, 2016  
Orlando, FL  
Loews Portofino Bay Hotel

View the full conference  
agenda & register today  
at [www.namasconference.com](http://www.namasconference.com)



8<sup>th</sup> ANNUAL  
**Auditing & Compliance**  
CONFERENCE 2016

• What is the Focus  
of MS-DRGs v34?

• A Deep Dive into  
MS-DRGs Under  
ICD-10

Discover  
**the Power of  
PowerBuying**



Call Craig King  
800-635-4040

### Save with PowerBuying

Through the DoctorsManagement  
PowerBuying division, you can save on items  
such as:

- office supplies
- clinical supplies
- capital equipment
- medical waste disposal
- cell phone agreements
- pharmacy purchases
- and more!

To start saving today, email Craig King at  
[cking@drsmgmt.com](mailto:cking@drsmgmt.com)

## UGLY HOLIDAY SWEATER CONTEST



We're excited to announce that during our annual  
conference, NAMAS will be hosting its first annual  
**Ugly Holiday Sweater Contest!**

During our exhibitor reception (on the evening of  
Wednesday, December 7th), all attendees are welcome to  
don their ugliest holiday attire. Our group of exhibitors and  
speakers will serve as judges and **the attendee with the  
ugliest attire will win a scholarship to attend our 2017  
conference for free!**

Start preparing your ugly holiday outfit now!

### In This Issue

[The APSO Note](#)

[NAMAS 8th Annual Conference](#)

[Speaker Spotlight-Sandy Routhier](#)

[NAMAS 1st Annual Ugly Holiday Sweater Contest](#)

[Become a NAMAS Member](#)

### Too Many Audits Stacking Up?

Let our team help with the backlog & keep you  
current!

DoctorsManagement & NAMAS employ Senior  
Management Auditors with no less than 10  
years of experience. Our team can perform  
your audits or offer hands-on assistance to  
your auditing team.

We can assist with:

- Valuation Audits
- Pre-Bill Audits
  
- Retrospective Audits
- Customized Training

To schedule your audit or training, contact  
NAMAS at 877-418-5564 or via email at  
[namas@namas.co](mailto:namas@namas.co)

Complimentary  
of Weeks

[Upcoming CPMA Exam](#)  
[Medical Auditing BootCamp](#)  
[E&M Auditing BootCamp](#)  
[Calendar of Events](#)  
[Upcoming Webinars](#)  
[PowerBuying](#)  
[NAMAS Auditing Services](#)  
[Receive These Tips](#)  
[Follow NAMAS](#)

## Tip <sup>of</sup> the Week

Our weekly auditing & compliance tip emails are available to anyone who could benefit from this information.

If you know someone who would like to receive these emails, invite them to sign.

Click the image above to be added to our email list!

### Stay Informed

Stay up to date with important news and announcements from NAMAS. Follow our social media pages to ensure you don't miss a beat!

