



# **Vitamin and Metabolic Assays Templates and Clinical Data Elements (CDEs)**

**Provider Compliance Group Special Open Door Forum**

**June 26, 2018**

**2:00-3:00 pm Eastern Time**

**Conference Call**

Participant Dial-In Number: 1-(800)-837-1935

Conference ID: 8085986

Connie Leonard

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Group Center for Program Integrity

Centers for Medicare and Medicaid Services

# Medical Review Documentation Compliance and Technology Contract

- CVP, Fairfax, VA 22030  
[www.cvpcorp.com](http://www.cvpcorp.com)
  - Tasked with providing services to facilitate health care providers' medical record documentation and Medicare contractors' review of medical record documentation.
  - Mechanism:
    - Templates and Clinical Data Elements to assist providers in improving documentation.
- Participating CVP technical support for this SODF:
  - Dr. Mark Pilley, Medical Director, StrategicHealthSolutions
  - Robert Dieterle, CEO EnableCare, LLC

# Agenda

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- Introduction and background – Connie Leonard / Kevin Young
- Overview of effort to improve documentation – Dr. Mark Pilley
- Templates and clinical data elements – Robert Dieterle
- Q&A – Connie Leonard  
Kevin Young  
Robert Dieterle  
Dr. Mark Pilley

# **Background on Improper Payment for Vitamin and Metabolic Assays (based on analysis of CERT laboratory claim data)**

- Vitamin and Metabolic Assays
  - Improper payment rate: 29.2% (187 million dollars)
  - 96.6% due to incomplete documentation

# **Vitamin and Metabolic Assays Templates and Clinical Data Elements (CDEs)**

The draft Vitamin and Metabolic Assays Templates and the associated Clinical Data Elements (CDEs) are available on the CMS.gov website which can be accessed through the link below:

<https://www.cms.gov/Research-Statistics-Data-and-Systems/Computer-Data-and-Systems/Electronic-Clinical-Templates/Other-Templates.html>

## **Vitamin and Metabolic Assays**

Order	-- CDEs Draft R1.0b 6/19/2018 -- Template Draft R1.0b 6/19/2018
Progress Note	-- CDEs Draft R1.0b 6/19/2018 -- Template Draft R1.0b 6/19/2018
Appendix A	-- Appendix A Draft R1.0a 6/19/2018

Also available with the Templates and CDEs:

The CMS presentation for the Special Open Door Forum -- “Vitamin and Metabolic Assays Templates and Clinical Data Elements (CDEs)”, held on June 26, 2018; 2:00-3:00 pm Eastern Time.

# Vitamin and Metabolic Assays

## Templates and Clinical Data Elements (CDEs)

### What are Clinical Data Elements?

Definitions of the content of individual “fields” in a template

#### Each CDE has the following characteristics:

- Unique identification (e.g. PDN01, PND02)
- Name (e.g. Patient Name, Date of Birth)
- Data type (e.g. text, date, number, value from a set)
- Selection type (e.g. single, multiple)
- Value Set (list of allowed selections) (e.g. Items to orders, diagnoses)

# Vitamin and Metabolic Assays

## Example Clinical Data Elements (CDEs)

### PBD: Patient/Beneficiary Demographics

**PBD1:** Patient's first name, last name and middle initial (text)

**PBD2:** Patient's date of birth (date: MM/DD/YYYY)

**PBD3:** Patient's Gender (Single selection from the value set: M/F/O)

**PBD4:** Patient's Medicare ID (Medicare ID format and check digit)

### PND: Provider/NPP Demographics

**PND1:** Provider or Allowed NPP first name, last name, middle initial and suffix (text)

**PND2:** Provider NPI (Numeric with check digit)

**PND3:** Provider Telephone Number (xxx-xxx-xxxxx ext xxxx)

**PND4:** Provider Direct address (Direct address)

# Vitamin and Metabolic Assays

## Templates and Clinical Data Elements (CDEs)

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### Use of Color and Font for Templates and CDEs

- 1) CDEs in black Calibri are required
- 2) CDEs in *burnt orange Italics Calibri* are required if the condition is met
- 3) CDEs in *blue Times New Roman* are recommended but not required



# General Template and CDE Information

## USE of templates and CDEs

- Medicare does not require the use of these templates and CDEs for reimbursement for Vitamin and Metabolic Assays.
- CDEs are designed for incorporation into provider EHR templates used to collect information during a patient encounter, recording laboratory results, and placing an order.
- Optional elements are present to assist providers in documenting the encounter and recording any pertinent information.
- Templates are visual representations of the CDE and may be printed, completed and made part of the patient's medical record in the event the provider does not have an EHR or the EHR does not support the elements to show that vitamin and metabolic assays are medically necessary and appropriate based on Medicare documentation requirements.

# Vitamin and Metabolic Assays

## Order Templates and Clinical Data Elements (CDEs)

- Guidance
- Template (sections) (note: CDEs are defined for all “fields”)
  - Required/*conditional* sections
    - Patient information
    - *Patient diagnoses and clinical indicators*
    - *Priority*
    - *Order for specific Vitamin and Metabolic Assays*
    - Signature, name, date ordered, NPI
  - Optional sections
    - Patient DOB, gender and Medicare ID
    - Provider contact and address information

# Vitamin and Metabolic Assays

## Progress Note

### Template and Clinical Data Elements (CDEs)

- Guidance
- Template (sections) (note: CDEs are defined for all “fields”)
  - Required/*conditional* sections
    - Patient information
    - *Provider Information (if different from signing provider)*
    - Diagnoses
    - *Clinical indications for vitamin and metabolic assays*
    - *Chief complaint and related past medical history*
    - *Medications*
    - *Review of Systems*
    - *Physical Examination*
    - *Assessment*
    - *Treatment plan*
    - *Orders*
    - Signature, name, date, and NPI
  - Optional sections
    - Patient DOB, gender and Medicare ID
    - Allergies

# **Vitamin and Metabolic Assays**

## **Templates and Clinical Data Elements (CDEs)**

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Questions?

# Vitamin and Metabolic Assays Templates and Clinical Data Elements (CDEs)

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General Comments/Recommendations?

*Feedback and suggestions on the templates can be sent  
to: [clinicaltemplates@cms.hhs.gov](mailto:clinicaltemplates@cms.hhs.gov)*