

The Chart Leak Checklist

Ten places revenue leaks out of a finished chart, and where to look.

Work down the list with your own reports open. Each line names the leak and the place it shows up, so you can check it this week rather than schedule a project.

BEFORE THE VISIT

☐ 1. Chart prep gaps

Care gaps and open orders that never got surfaced before the visit. Pull 10 charts for tomorrow morning and check.

DURING THE VISIT

☐ 2. E/M level against the documentation

Visits coded below what the note already supports. Sample 20 recent fee-for-service charts against coding guidelines.

☐ 3. In-visit charges

Procedures, vaccines, and point-of-care tests documented but never charged. Charge reconciliation report.

AFTER THE VISIT

☐ 4. HCC and risk codes

Chronic conditions treated this year and never recaptured. Risk-gap report.

☐ 5. Same-day chart closure rate

EHR analytics. Anything under 80% is a leak.

☐ 6. Claims held on unsigned notes

Days from the visit to the claim going out the door. Billing lag report.

FOLLOW-THROUGH

☐ 7. Referrals that never got scheduled

Referral status report, 90-day lookback.

☐ 8. Recalls and preventive follow-ups that expired unworked

Recall work queue.

☐ 9. Prevention and care coordination work that never got billed

Compare care-management activity to the codes you billed.

ADOPTION

☐ 10. Documentation tooling your providers quietly stopped using

Usage report against license count.

Working the list turns up a number. The Chart Revenue Leak Calculator, the other half of this kit, puts a figure on it and splits it by payer type.

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