



FOR PROVIDERS.
BY PROVIDERS.

CLIENT/PATIENT FILE CHECKLIST



DMEPOS

This checklist can be used as a tool to audit and ensure the required documents are present in your client/patient record. Using this checklist does not guarantee compliance with ACHC standards, nor approval of accreditation.

Accreditation Commission for Health Care (ACHC) Standard DRX 5-1A states that an organization must have a written policy and procedure established and implemented relating to the required content of the client/patient record.

Client/Patient Record should contain the following, but is not limited to:

- Identification data
- Names of family/legal guardian/emergency contact
- Name of primary caregiver(s)
- Name of physician responsible for care
- Diagnosis
- Physician's orders
- Signed release of information
- Admission and informed consent documents
- Assessment of the home, if applicable
- Initial assessments
- Ongoing assessments, if applicable

Other ACHC standards that require information to be maintained in the client/patient record include the following:

- DRX2-2A Receipt of client/patient rights and responsibilities
- DRX2-2C Receipt of DMEPOS Supplier Standards
- DRX2-4C Receipt of the process for filing a complaint
- DRX2-5A Receipt of information regarding confidentiality
- DRX3-4B Documentation of communication about financial responsibilities
- DRX3-5A Financial hardships forms if unable to pay
- DRX3-6A Medical necessity documentation required by payers
- DRX5-1D All entries are signed & dated with credentials where applicable
- DRX5-3D-H Plan of service
- DRX5-4A Evidence of client/patient participation in the plan of service
- DRX5-4C, D Plan of service reviews and updates
- DRX5-5 Proof of education
- DRX5-8A Documentation of requests for refills
- DRX5-14A Assembly documentation Complex Rehabilitation and Assistive Technology Supplier (RTS)
- DRX5-15D, E Discharge/Transfer summaries
- DRX7-4C Receipt of emergency preparedness education
- DRX7-12E Receipt of back up equipment, where applicable
- DRX7-15A Offering of an assortment of products (Fitter, RTS)
- DRX7-16A Receipt of warranty information