

A new workflow for Independent/Shared Visits – encounters involving an MD and an APP (Advanced Practice Provider, i.e. PA/NP) will be introduced to ensure billing compliance and standardization.

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Shared Visits: Essentials for Providers

- A physician and an Advanced Practice Provider (APP) – an NP or PA – conduct face-to-face visits with a patient, separately or overlapping, on the same day.
- The MD and APP each perform and independently document a substantive portion. "Substantive" means at least one of the three components of an Evaluation & Management (E&M) visit – History, Exam, or Medical Decision-Making (Assessment & Plan), with the MD typically performing the latter at minimum.
- The MD and APP document while logged into their respective Apex accounts, each adding to a *single, shared Progress Note*.
- The MD and APP indicate their respective section of the shared Progress Note using a unique smartphrase.
- The coding team determines a single level of service using the combined documentation within the single note.
 - Time-based billing is also possible. A) *Both* MD and APP document total visit & counseling & and critical care time, where appropriate. (system triggers this for patients >6 years of age) B) Be careful not to double-count time if the MD and APP interactions overlap
- Procedure Notes can **never** be shared which includes critical care time based billing
- Procedure notes should be separate from encounter notes except with imbedded critical care procedure billing

Assignment of Credit by the Health System:

- For Shared Visits Identified by the Faculty Practice Analytics group,
 - 60% of the Funds Flow value of the visit is allocated to the faculty member for recognized Share Visits.
 - 40% of the Funds Flow value will be allocated to APP

Shared/Split or Independent Visit Note Workflow

Assignment of a supervising provider for documentation is required for APPs in all settings. (This is a requirement for certain payers) This can be done at login or after logging into APeX. A new Smart Link **“.APPNOTE”** needs to be added in the body of the note. When writing a note for a shared/split visit, a cosigner name is required so select the “Cosign Required” button.

1. After logging in with your username and password, enter a **Type of Supervision** and a **Supervising Provider**

2. From the Note section (this will vary by service for note type), click in the box next to **Cosign Required**. This step is not required for independent visits.

3. At the beginning of your progress note, add the Smart Link **“.APPNOTE”**

- NoteWriter automatically opens. Choose **Shared** or **Independent** APP Note Type. Choose **Yes** or **No** if the patient requires critical care. (For patients under the age of 6, critical care option will not appear as not time based)

Change supervising physician if different from supervisor at login

- The statement of shared service appears. If independent is selected as note the type, the following statement will appear: **“This is an independent service. The available consultant for this service is Inpatient Attending, MD.”**

(APP Note Info can be selected within the encounter if you wish to change between, Independent or Shared encounter type as patient condition of situation demands)

Access SmartForm from this button after adding SmartLink .appnote

- The note can now be reviewed by the attending for the shared visit via the patient’s encounter or from the Attest/Cosign Notes folder in the attending’s In Basket.



NOTE: If copy forward of a prior note is standard in your workflow, this functionality will continue to work but it will carry forward the past smart block from the prior note, if present. You need to re-select if the note is independent or shared using the provided instructions above.