

Charting Checklist



This charting checklist is here to guide you on what needs to be documented in your chart note for both insurance compliance and standardized Nourish documentation.

Patient & Family Medical History

- ☐ All relevant Dx, general timeline of Dx, and relevant treatment details are documented
- ☐ Additional details related to supplements or medications are documented, if needed
- ☐ Any patient quotes in quotations or clearly documented as coming from the patient

Anthropometrics

- ☐ Anthropometrics are documented & collected in the chart, if relevant to PES statement/outcomes
- ☐ Energy needs are calculated if relevant to PES statement interventions

Weight History

- ☐ Relevant weight history is collected, such as usual body weight and weight trends over time, if relevant to PES statement, interventions, or long-term goals

Medications

- ☐ All medications and supplements, including the dose that the patient is taking, are listed here or in the family medical history if unable to populate in the medication section

Lifestyle

- ☐ Additional detail is included if relevant to patient assessment, concerns, and conditions

PES Statement(s)

- ☐ PES is included
- ☐ Nutrition problem (P) is supported by assessment (e.g., *If P is Obesity-Adult - a BMI is listed for the patient, If P is Altered Gastrointestinal Function - there is information about the patient's GI symptoms or GI related Dx*)
- ☐ Etiology is supported by assessment
- ☐ Signs/Symptoms are supported by assessment
- ☐ Relevant details are included for Signs/Symptoms under Detail (e.g., Lab values (TG 300) Body Mass Index (BMI of 35), maladaptive eating behaviors (skipping meals, binge eating), etc

Patient Update

- ☐ Present at follow up chart; can notate 'to be collected in follow up' in an initial note
- ☐ Include any updates from patient on goals and life events pertinent to care in between visits

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Diet Recall

- ☐ Diet recall present, if documented as a Sign/Symptom for PES statement

Interventions

- ☐ If recommending supplements - charting follows supplement SOP
- ☐ The intervention details clearly describe the interventions (nutrient delivery, education, counseling, coordination) the RD provided to the patient in session
- ☐ Aligns with the PES & aims to resolve the etiology/sign & symptom

Short Term Goals

- ☐ Does the short term goal reflect how the patient is going to carry out the interventions (i.e. patient behavior)
- ☐ Aligns with PES and intervention(s)

Long Term Goals

- ☐ Outcomes that you plan to support your patient on over the course of your work together
- ☐ Aligns with the PES and intervention(s)

Follow Up Plan

- ☐ Scheduled weekly appointments per the Nourish program

Appointment Summary Message to Patient

- ☐ Generate Summary that uses Interventions & Short Term goals to create a polished After Visit Summary for the patient
- ☐ Avoid adding additional education/intervention that has not been captured in Intervention section
**The Appointment Summary Patient Message appears at the bottom of the chart note in the provider portal for convenience, but it is not part of the official note submitted for billing*

Important to Note:

- Direct patient quotes should be in quotations or clear they were spoken by patient
- Outcomes should be collected 1x/month or when new data is present