

HEDIS® RECOMMENDED MINIMUM DOCUMENTATION

For Health Care Providers

October 2023

The Health Information Portability and Accountability Act (HIPAA) Privacy Rule governs the use and disclosure, access to, and protection of an individual's personal health information (PHI). Collection of medical record review data for quality programs, including Healthcare Effectiveness Data and Information Set (HEDIS®),* are required to make reasonable effort to limit unnecessary or inappropriate access to PHI under the HIPAA minimum necessary standard.

CBP - Controlling High Blood Pressure

- Demographic sheet verifying the patient's name and date of birth
- 2023 Preventive health/wellness exam, sick, and telehealth visits
- 2023 Vital sign flowsheets (including BP)

CCS - Cervical Cancer Screening

- Demographic sheet verifying the patient's name and date of birth
- 2023 Preventive health/wellness exam, sick, and telehealth visits
- History and physical, past medical/surgical history
- 2021 - 2023 Cervical cytology (Pap) test with date and results
- 2019 - 2023 Cervical HPV test with date and results

HBD - Hemoglobin A1c Control for Patients With Diabetes

- Demographic sheet verifying the patient's name and date of birth
- 2023 Preventive health/wellness exam, sick, and telehealth visits
- 2023 HbA1c tests and results

BPD - Blood Pressure Control for Patients With Diabetes

- Demographic sheet verifying the patient's name and date of birth
- 2023 Preventive health/wellness exam, sick, and telehealth visits
- 2023 Vital sign flowsheets (including BP)

EED - Eye Exam for Patients With Diabetes

- Demographic sheet verifying the patient's name and date of birth
- 2022 - 2023 Preventive health/wellness exam, sick and telehealth visits
- 2022 - 2023 Retinal or dilated eye exams and results with an eye care professional

IMA - Immunizations for Adolescents

- Demographic sheet verifying the patient's name and date of birth
- 2023 Preventive health/wellness exam, sick, and telehealth visits.
- Immunization record ages 9 to 13

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CIS – Childhood Immunization Status

- Demographic sheet verifying the patient’s name and date of birth
- 2021– 2023 Preventive health/wellness exam, sick, and telehealth visits.
- Immunization record birth to two years

COL – Colorectal Cancer Screening

- Demographic sheet verifying the patient’s name and date of birth
- 2022 – 2023 Preventive health/wellness exam, sick, and telehealth visits
- History and physical, past medical/surgical history with date of last colorectal cancer screening
- 2014 – 2023 Colonoscopy report with date and results; **or**
- 2021 – 2023 Stool DNA (sDNA) with FIT test (i.e., Cologuard®) with date and results; **or**
- 2019 – 2023 Flexible sigmoidoscopy or CT colonography test with date and results; **or**
- 2023 FOBT screening with date and results

PPC – Prenatal and Postpartum Care

- Demographic sheet verifying the patient’s name and date of birth
- 2022 – 2023 Prenatal care record (e.g., obstetrical flow sheets including virtual/telehealth, laboratory tests, ultrasound, and estimated date of delivery [EDD])
- 2022 – 2023 Postpartum visit notes (including virtual/telehealth, postpartum assessments, glucose, depression, or other screenings)
- 2022 – 2023 Vital sign flowsheets (including weight and BP)
- Documentation that patient did not deliver a live birth or was not pregnant, if applicable

WCC – Weight Assessment and Counseling for Nutrition and Physical Activity for Children/Adolescents

- Demographic sheet verifying the patient’s name and date of birth
- 2023 Preventive health/wellness exam, sick, and telehealth visits (including nutrition and sports physical exams)
- 2023 BMI percentiles, height and weight (i.e., vital sign flowsheets)
- 2023 BMI age percentile growth charts

Lead Screening – New York (NY)

- Demographic sheet verifying the patient’s name and date of birth
- Lead blood test (capillary or venous) and results birth to two years



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