

# Healthcare Effectiveness Data and Information Set – Recommended minimum documentation

For Health care providers

**The Health Information Portability and Accountability Act (HIPAA) Privacy Rule governs the use and disclosure, access to, and protection of an individual’s protected 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.**

## **Blood Pressure Control for Patients with Diabetes (BPD)**

- Demographic sheet verifying the patient’s name and date of birth
- 2025 preventive health/wellness exam, sick, and telehealth visits
- 2025 Vital Sign Flowsheets (including blood pressure)

## **Controlling High Blood Pressure (CBP)**

- Demographic sheet verifying the patient’s name and date of birth
- 2025 preventive health/wellness exam, sick, and telehealth visits
- 2025 Vital Sign Flowsheets (including blood pressure)

## **Glycemic Status Assessment for Patients with Diabetes (GSD)**

- Demographic sheet verifying the patient’s name and date of birth
- 2025 preventive health/wellness exam, sick, and telehealth visits
- 2025 HbA1c tests and results
- 2025 AGP reports and results
- 2025 Glucose Management Indicator (GMI) test and results (usually found in office visit note)

## **Lead Screening in Children– New York (NY) (LSC)**

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

## **Prenatal and Postpartum Care (PPC)**

- Demographic sheet verifying the patient’s name and date of birth
- 2024 – 2025 prenatal care record (including virtual/telehealth, obstetrical flow sheets, laboratory tests, ultrasound, EDD, or LMP)
- 2024 – 2025 postpartum visit notes (including virtual/telehealth, postpartum assessments, glucose, depression, or other screenings)
- 2024 – 2025 Vital Sign Flowsheets (including weight and blood pressure)

\*HEDIS® is a registered trademark of the National Committee for Quality Assurance (NCQA).

- Documentation that patient did not deliver a live birth or was not pregnant, if applicable

**Weight Assessment and Counseling for Nutrition and Physical Activity for Children/Adolescents (WWC)**

- Demographic sheet verifying the patient's name and date of birth
- 2025 body mass index (BMI) percentiles, height and weight (i.e., Vital Sign Flowsheets)
- 2025 BMI-age percentile growth charts
- 2025 preventive health/wellness exam, sick, and telehealth visits (including nutrition and sports physical exams)
- Notation of "5210 Every Day," which is an acronym that stands for five or more fruits/vegetables, two hours or less screen time, one hour or more of physical activity, and zero sugary drinks
- Copy of handout if "anticipatory guidance is given" for nutrition or physical activity
- Documentation related to pregnancy in 2025