

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 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.

BPD – Blood Pressure Control for Patients With Diabetes

- Demographic sheet verifying the patient's name and date of birth
- 2024 preventive health/wellness exam, sick, and telehealth visits
- 2024 Vital Sign Flowsheets (including BP)

CBP - Controlling High Blood Pressure

- Demographic sheet verifying the patient's name and date of birth
- 2024 preventive health/wellness exam, sick, and telehealth visits
- 2024 Vital Sign Flowsheets (including BP)

CCS - Cervical Cancer Screening

- Demographic sheet verifying the patient's name and date of birth
- 2024 preventive health/wellness exam, sick, and telehealth visits
- History and physical, past medical/surgical history
- 2022 – 2024 cervical cytology (Pap) test with date and results
- 2020 – 2024 cervical HPV test with date and results

CIS – Childhood Immunization Status

- Demographic sheet verifying the patient's name and date of birth
- 2022 – 2024 preventive health/wellness exam, sick, and telehealth visits.
- Immunization record birth to two years

EED – Eye Exam for Patients With Diabetes

- Demographic sheet verifying the patient's name and date of birth
- 2023 – 2024 preventive health/wellness exam, sick and telehealth visits
- 2023 – 2024 retinal or dilated eye exams and results with an eye care professional

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

GSD – Glycemic Status Assessment for Patients With Diabetes

- Demographic sheet verifying the patient's name and date of birth
- 2024 preventive health/wellness exam, sick, and telehealth visits
- 2024 HbA1c tests and results
- 2024 AGP reports and results
- 2024 Glucose Management Indicator (GMI) test and results (usually found in office visit note)

IMA – Immunizations for Adolescents

- Demographic sheet verifying the patient's name and date of birth
- 2024 preventive health/wellness exam, sick, and telehealth visits.
- Immunization record ages 9 to 13

LSC - Lead Screening in Children– 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

PPC – Prenatal and Postpartum Care

- Demographic sheet verifying the patient's name and date of birth
- 2023 – 2024 prenatal care record (including virtual/telehealth, obstetrical flow sheets, laboratory tests, ultrasound, EDD, or LMP)
- 2023 – 2024 postpartum visit notes (including virtual/telehealth, postpartum assessments, glucose, depression, or other screenings)
- 2023 – 2024 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
- 2024 BMI percentiles, height and weight (i.e., Vital Sign Flowsheets)
- 2024 BMI-age percentile growth charts
- 2024 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 5 or more fruits/vegetables, 2 hours or less screen time, 1 hour or more of physical activity, and 0 sugary drinks
- Copy of handout if "anticipatory guidance is given" for nutrition or physical activity
- Documentation related to pregnancy in 2024