

90-Day Documentation Remediation Roadmap

Three phases. Pick a start date and commit. Drift only loses to a practice that audits itself.

PHASE 1 DAYS 1-30 AUDIT

- Week 1** Run the five-domain self-assessment across clinical, compliance, operational, transition-ready, FL-specific. Identify your top 3 priority gaps.
- Week 2** Pull 10 random charts from the last 60 days. Review against six-element audit standard. Document the gaps.
- Week 3** Review HIPAA policies for date currency. Check whether SRA is within 12 months. Note exposures.
- Week 4** Consolidate findings into a written remediation backlog with owner and deadline for each item.

PHASE 2 DAYS 31-60 REMEDIATE

- Week 5** Fix templates: SOAP, treatment plans, informed consent. Build region-by-name into the SOAP template by default.
- Week 6** Update HIPAA policies. Complete SRA if overdue (free tool at healthit.gov/privacy-security/security-risk-assessment-tool).
- Week 7** Audit employment files: I-9 within 3 business days of hire, signed handbook, performance reviews. Remediate gaps.
- Week 8** Train staff on template and policy changes. Document training completion for every employee.

PHASE 3 DAYS 61-90 SYSTEMATIZE

- Week 9** Establish quarterly chart audit cadence. Block calendar time. Without recurring rhythm, drift returns within months.
- Week 10** Establish annual policy review and SRA cycle. Block dates 12 months out so they don't lapse again.
- Week 11** Set up vendor contract renewal calendar. No expired or auto-renewed agreements should be unknown again.
- Week 12** 90-day review. What worked, what didn't, what carries into Q2. Set the next quarter's priorities.

COMMITMENT: My start date is _____ My first priority gap is _____