

CLINICIAN CHECKLIST FOR CLINICAL EVALUATION

Documentation References: [Standard Documentation Requirements Policy Article \(A55426\)](#)

A clinical evaluation for a condition that supports the need for the item must be conducted prior to an initial Standard Written Order (SWO). Documentation of a clinical evaluation needs to include:

Date of the visit

Beneficiary name

The clinical examination must document that the beneficiary was evaluated and/or treated for a condition that supports the need for the item(s) of DME ordered

The clinical encounter must be documented in the pertinent portion of the medical record (e.g., history, physical examination, diagnostic tests, summary of findings, diagnoses, treatment plan)

Signature of provider

A clinical evaluation is needed for the following reasons:

For an initial Standard Written Order (SWO)/prescription of a DMEPOS item

When there is a change in the Standard Written Order (SWO)/prescription for an accessory, part, etc.

On a regular basis if it is specified in the documentation section of a particular medical policy

When an item is replaced

When there is a change in the supplier