



Clinical Documentation: A Future-Forward Approach

Part 2

Defensible Documentation Protecting Clinical Decisions

Introduction

About the Presenter



Barb Whitlock

Lead Consultant

Healthcare Performance Improvement

The Documentation Intelligence Checklist

A refresher from Part 1

- 1 | Name It Precisely**
Type, acuity, severity, stage, site, etiology
- 2 | Give a Reference Point**
Today vs. yesterday, admission, or stated baseline
- 3 | Timestamp the Inflection**
When the course changed, what triggered it, what you did
- 4 | Resolve & Reconcile**
"Resolved" with a date; explicit, reasoned disagreement
- 5 | Show Your Evidence**
Clinical indicators in the same note as the diagnosis
- 6 | Show the Response**
The intervention & its measured effect—including none
- 7 | Make the Burden Visible**
Chronic conditions being addressed—and only those
- 8 | Write for the Next Reader**
Would they know the direction of travel?

Why Clinical Documentation Must Be Defensible

A documentation record should survive three distinct questions:

1

Clinical validation asks whether the diagnosis is supported.

2

Medical necessity asks whether the setting and services were needed.

3

Managed care review asks whether the case meets applicable coverage and contract rules.

Use in Practice

Connect the finding to the service and setting of care.



Learning Objectives

1

Document medical judgment, not only criteria.

2

Identify reasoning signals that strengthen concurrent review and appeals.

3

Build one patient story that supports validation, necessity, and payor review.

Four Sections, One Defensible Record

Each section adds one link to the same patient story, from the bedside reasoning chain to the payor's desk.

Section 1

Clinical Reasoning

Physiology → intervention → trajectory → risk, in every note

Section 2

Care Necessity

Beyond Two-Midnight: why this setting is required, day by day

Section 3

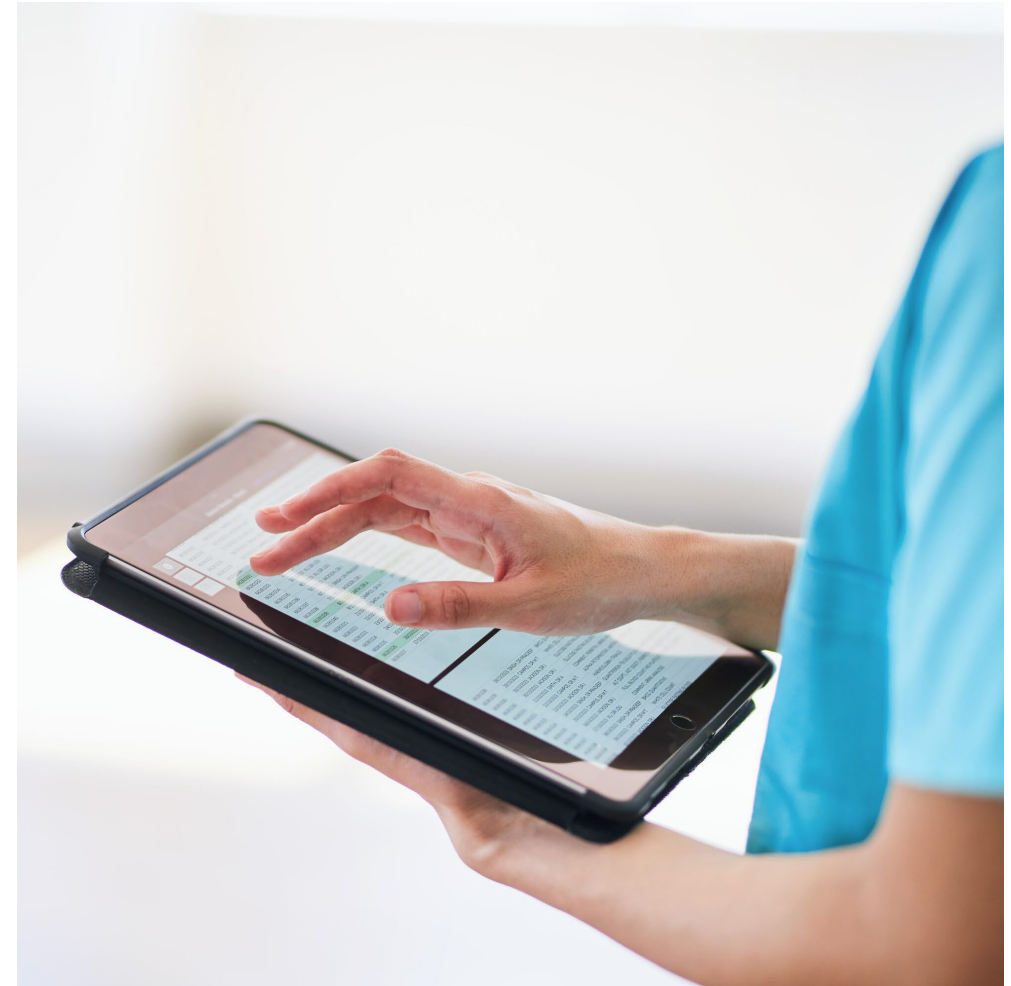
Cross-Payor Defense

One clinical record, mapped to policy, contract, and appeal

Section 4

Physician Advisor

Peer-level coaching, delivered while the note can still change.



The Operating Model

One patient story, multiple review lenses

The record should state what is happening, why the plan fits, what response is expected, and what risk remains.

The Four-Part Reasoning Chain

Physiology → intervention → trajectory → risk

A defensible note connects the abnormal state to treatment, defines the expected response, and identifies the consequence of nonresponse.



Use in Practice

Connect the finding to the service and setting of care.

Clinical Example

COPD Exacerbation: The Same Case, Written Two Ways

The case: 71-year-old man with COPD, three days of increasing dyspnea & productive cough

Weak Note: Criteria-shaped



“COPD exacerbation. Meets inpatient criteria. Admit.”

Nothing here explains judgment. Validation can't confirm the diagnosis, necessity can't see why observation wouldn't be sufficient, and the payor sees an assertion, not a rationale.

Defensible Note: The Four Elements



What Is Happening: Accessory muscle use, RR 28, SpO2 86% on room air, pH 7.31 with pCO2 58: acute-on-chronic hypercapnic respiratory failure, not baseline COPD. Baseline SpO2 94%, pCO2 44 two months ago.

Why the Plan Fits: Failed two rounds of nebs and steroids in the ED with persistent hypercapnia; started on BiPAP, which requires monitored inpatient care with respiratory therapy at the bedside.

What Response Is Expected: Anticipate pH normalization and BiPAP weaning over 24–48 hours, with transition to nasal cannula before discharge planning begins.

What Risk Remains: If pCO2 does not fall on repeat gas in 4 hours, the patient will require intubation and ICU transfer; home support is limited, so premature discharge carries high readmission risk.

Why It Works

One paragraph, three lenses: the ABG and baseline comparison support clinical **validation**, the failed ED treatment & BiPAP support medical **necessity**, and trajectory plus escalation risk support **payor review**. No criteria language anywhere.

Differential Diagnosis

Make meaningful alternatives visible

Name the leading diagnosis, the credible alternatives that affect care, and the evidence that changes probability.



Use in Practice

Ask what evidence changes the decision.

Clinical Example

Sepsis or UTI: Documenting the Judgment Behind the Call

The case: 82-year-old woman from a skilled nursing facility, fever and new confusion, admitted from the ED

Weak Note: Criteria-shaped



“Sepsis due to UTI. Continue IV antibiotics. Inpatient.”

A label, not a judgment. No organ dysfunction is shown, no alternative is ruled out, and nothing explains why IV therapy in a monitored bed is better than a return to the facility. This is the classic clinical validation denial.

Defensible Note: The Four Elements



What Is Happening: T 38.9, HR 118, SBP 86 after 2L crystalloid, lactate 3.4, creatinine 2.1 from a baseline of 0.9, & acute metabolic encephalopathy. Pyuria with gram-negative rods on urine gram stain. This is sepsis with hypoperfusion and acute kidney injury, not an uncomplicated UTI.

Why the Plan Fits: Considered and addressed: pneumonia (chest imaging clear), C. difficile (no diarrhea), and medication-induced delirium (no new agents). Requires vasopressor-capable monitoring, serial lactates, and IV antibiotics with renal dosing—unavailable at the facility.

What Response Is Expected: Expect lactate clearance and MAP above 65 without pressors within 24 hours, creatinine trending down by day 2, and mental status returning to her documented SNF baseline before transition to oral therapy.

What Risk Remains: If the lactate does not clear or pressures fall again, she needs central access and ICU transfer. With her age, AKI, and baseline frailty, early discharge risks return in septic shock.

Why It Works

One paragraph, three lenses: the lactate, pressures, and creatinine delta satisfy **validation**, the ruled-out alternatives and monitoring needs satisfy **necessity**, and the stated trajectory plus escalation plan satisfy **payor review**. The differential does the work the label could not.

Evidence for & Against

Credibility comes from balanced reasoning

Include findings that support the leading diagnosis and material findings that argue against it; explain why the diagnosis remains favored.



Use in Practice

State the risk and the next decision point.

Clinical Example

Acute Dyspnea: Showing the Evidence That Cuts Both Ways

The case: 58-year-old woman with two days of worsening dyspnea, a history of both heart failure and COPD

Weak Note: Criteria-shaped



“Acute CHF exacerbation. BNP elevated. IV diuresis.”

One number, one diagnosis. The record ignores the fever and the infiltrate, so a reviewer reading the same chart calls it pneumonia & the heart failure diagnosis is removed on validation review.

Defensible Note: The Four Elements



What Is Happening: Orthopnea, JVD to the jaw, bilateral crackles, 6 kg weight gain, and BNP 1,840 from a baseline of 320. Concurrently, T 38.4, WBC 14.2, and a right basilar infiltrate—pneumonia is a live alternative.

Why the Plan Fits: The fever and infiltrate favor pneumonia, but the weight gain, JVD, and BNP delta cannot be explained by infection alone. Both are being treated: this is pneumonia precipitating acute decompensated heart failure, requiring IV diuresis with telemetry and antibiotics.

What Response Is Expected: Expect 2 to 3 liters of net negative fluid balance in 48 hours with oxygen requirement falling toward her 2-liter baseline, and defervescence within 72 hours of antibiotics.

What Risk Remains: Competing risks in both directions: over-diuresis in sepsis risks hypotension and renal injury, under-diuresis risks respiratory failure and intubation. She needs daily reassessment of which process is leading—not a single decision made on admission.

Why It Works

One paragraph, three lenses: the BNP delta, JVD, and weight gain satisfy **validation**; the dual treatment and telemetry need satisfy **necessity**; and the stated trajectory plus decision point satisfy **payor review**. Naming the evidence against is what makes the conclusion credible.

Avoid Premature Closure

A negative early test may not end a high-risk evaluation

Document the reasoning for continued workup despite a reassuring initial result.



Use in Practice

Connect the finding to the service and setting of care.

Clinical Example

Thunderclap Headache: Why a Negative Scan Did Not End the Workup

The case: 52-year-old woman with sudden, maximal-at-onset headache; non-contrast head CT read as negative

Weak Note: Criteria-shaped



“Headache. CT negative. Observe, treat pain, likely migraine.”

One negative test closes the case on paper. The record shows a reassuring result and no reasoning, so continued monitoring reads as convenience and the second day is denied as not medically necessary.

Defensible Note: The Four Elements



What Is Happening: Maximal-at-onset headache with neck stiffness and one episode of vomiting, in a patient with hypertension and a first-degree relative with a ruptured aneurysm. CT was obtained at 9 hours from onset, beyond the window of highest sensitivity.

Why the Plan Fits: A negative CT at this interval lowers but does not eliminate the probability of subarachnoid hemorrhage. Given the pretest risk, CT angiography and neurologic checks every 2 hours continue, with lumbar puncture if imaging is indeterminate.

What Response Is Expected: Expect CTA and neurologic checks to be complete within 12 hours. If both are negative and the headache is controlled on oral therapy, she is dischargeable with a stated return plan.

What Risk Remains: A missed aneurysmal bleed carries a high rate of rebleeding and death within 72 hours. Closing the workup on one negative test, in a patient with this presentation & family history, is the error the monitoring exists to prevent.

Why It Works

One paragraph, three lenses: the onset pattern and pretest risk satisfy **validation**, the timing limits of the scan and ongoing neuro checks satisfy **necessity**, and the stated endpoint for stopping the workup satisfies **payor review**. A negative test is documented as a probability, not a conclusion.

Clinical Indicators Are Not a Checklist

**Indicators support judgment;
they do not replace it**

Use the total clinical picture: history, examination, trends, treatment response, organ impact, and competing explanations.



Use in Practice

Ask what evidence
changes the decision.

Clinical Example

Severe Malnutrition: Indicators Cited vs. Judgment Shown

The case: 68-year-old man admitted for pneumonia; dietitian flags severe protein-calorie malnutrition

Weak Note: Criteria-shaped



“Severe malnutrition. Meets 2 ASPEN criteria. Albumin 2.6. Agree with dietitian.”

Criteria copied, judgment absent. Albumin is an acute-phase reactant, not a nutrition marker, & no physician assessment links the findings to this patient. As a result of OIG audits, this is the most commonly removed CC/MCC in clinical validation reviews.

Defensible Note: The Four Elements



What Is Happening: Unintentional loss of 9 kg over 3 months, roughly 12% of body weight. Temporal and interosseous wasting on exam, reduced grip strength, ad intake under 50% of estimated needs for more than a month.

Why the Plan Fits: Physician assessment agrees with the dietitian: chronic illness-related malnutrition, severe. Supplements and calorie counts started with electrolyte monitoring for refeeding risk. The albumin is noted as inflammatory, not the basis for the diagnosis.

What Response Is Expected: Expect intake to reach 75% of goal within 3 days with stable phosphorus and magnesium, and outpatient nutrition follow-up arranged before discharge.

What Risk Remains: Malnutrition at this severity is often associated with delayed wound healing, longer ventilation, and readmission. Untreated, it changes the trajectory of the pneumonia admission itself, which is why it is a treated condition and not a footnote.

Why It Works

One paragraph, three lenses: the weight loss, wasting, and intake history satisfy **validation**; the treatment plan and refeeding monitoring satisfy **necessity**; and the stated clinical impact plus follow-up satisfy **payor review**. The indicators support the diagnosis; the physician’s judgment establishes it.

Link Physiology to Treatment

Explain why this intervention is required

“Because” language makes the clinical logic explicit, *e.g.*, continue telemetry because recurrent arrhythmia remains possible.



Use in Practice

State the risk and the next decision point.

State the Expected Trajectory

Define what improvement should look like

Specify the response window, measurable markers, and the contingency if the patient does not improve.



Use in Practice

Connect the finding to the service and setting of care.

Document Residual Risk

Improvement does not always equal readiness

Acknowledge gains while stating the remaining instability, support, monitoring, or unresolved diagnosis.



Use in Practice

Ask what evidence
changes the decision.

Clinical Example

Improving but Not Ready: Documenting Residual Risk on Day 3

The case: 74-year-old woman admitted in diabetic ketoacidosis, now on hospital day 3 and much improved

Weak Note: Criteria-shaped



“DKA resolved. Gap closed. Patient improving. Continue current care.”

Written as if the story is over. “Improving” without residual risk reads as a stable patient occupying a bed, and day 3 is the day continued-stay review turns the case down.

Defensible Note: The Four Elements



What Is Happening: Anion gap closed and mental status back to baseline, but she remains on IV insulin with glucose swings of 180 to 340, potassium 3.2 requiring replacement, and creatinine 1.6 from a baseline of 1.0.

Why the Plan Fits: The precipitant—a urinary source with ongoing IV antibiotics—is not yet resolved, and she has not tolerated a full oral diet. Transition to subcutaneous insulin requires overlap and hourly glucose monitoring that cannot be done at home.

What Response Is Expected: Expect a successful subcutaneous transition within 24 hours, potassium and creatinine normalized, and tolerance of two consecutive meals before discharge teaching begins.

What Risk Remains: Discharging on an unproven insulin regimen with an unresolved infection and hypokalemia risks recurrent ketoacidosis within days. She lives alone and does not yet self-administer insulin.

Why It Works

One paragraph, three lenses: the glucose swings and electrolyte and renal values satisfy **validation**, the unresolved precipitant and monitored insulin transition satisfy **necessity**, and the named discharge criteria plus recurrence risk satisfy **payor review**. Improvement is documented alongside what is still unresolved.

Section 1 Takeaways

Apply This in Your Next Note

1

Write one “because” sentence linking the abnormal physiology to the treatment ordered.

2

Name the leading diagnosis plus the alternatives still in play, and the evidence weighing each.

3

State the expected response window and the residual risk that keeps the patient here.

Example Documentation

“Acute hypoxemic respiratory failure due to CHF exacerbation: SpO2 88% on room air, now 6L HFNC because work of breathing persists. CHF is favored; PE & pneumonia remain credible given pleuritic pain & prior immobility. Expect oxygen $\leq$ 2L within 24 hours on IV diuresis; if not, obtain CTA. Residual risk: continued oxygen dependence & rising creatinine.”

Care Necessity

**Beyond Two-Midnight:
what the record must
still explain**

Time is a benchmark. The clinical
narrative remains the defense.

Two-Midnight Foundation

Expectation must be clinically supported

For Medicare Part A, the practitioner's expectation is based on complex medical factors, including history, comorbidities, severity, current needs, and adverse-event risk. Those factors must be documented.



Use in Practice

Connect the finding to the service and setting of care.

At Admission

Capture expectation at the point of decision

State anticipated duration, clinical basis, hospital-level services, and why a lower setting of care is unsafe or insufficient.



Use in Practice

Ask what evidence changes the decision.

Pattern-of-Care Triggers

Delivered care should match the claimed level

Reviewers compare the record's stated risk with actual monitoring, treatment intensity, reassessment, & escalation.



Use in Practice

State the risk & the next decision point.

Daily Necessity

Every day needs a current clinical purpose

Progress notes should update what changed, what remains unresolved, what hospital service is still required, and the next decision point.



Use in Practice

Connect the finding to the service and setting of care.

Avoidable-Day Flags

Separate medical need from throughput delay

Identify whether the day reflects active acute care or a barrier such as placement, transportation, delayed testing, or administrative processing.



Use in Practice

Ask what evidence changes the decision.

Response to Therapy

Write the trajectory, not yesterday's snapshot

Use comparative language, e.g., improved, worsened, persistent, recurrent, escalating, weaning, or failed. Pair the trend with its clinical implication.



Use in Practice

State the risk on the next decision point.

Status Change Documentation

Explain why the status changed

When escalating or de-escalating the status, record the new finding, the changed risk, the service required, and why the prior setting no longer fits.



Use in Practice

Connect the finding to the service and setting of care.

Clinical Example

Across the Stay: Expectation, Daily Necessity, & Status Change

The case: 79-year-old man with aspiration pneumonia and dementia, admitted from home; stay runs three days

Weak Record: Status-Shaped



Day 1: “Admit inpatient, pneumonia.”
Day 2: “Stable, continue.” **Day 3:**
“Awaiting SNF bed.”

Three days, no reasoning. The expectation is never stated, day 2 has no current purpose, & day 3 names a placement barrier instead of a medical need—a status downgrade plus an avoidable day.

Defensible Record: Day-by-Day



Expectation at Admission: Day 1, expectation stated: hypoxia to 86% on room air, RR 30, multilobar infiltrate, dementia with recurrent aspiration risk. Two or more midnights are anticipated for IV antibiotics, oxygen titration, and supervised swallow evaluation.

Pattern of Care: Care delivered matches the risk claimed: continuous pulse oximetry, 4 liters of oxygen, IV antibiotics, chest physiotherapy, and a failed bedside swallow leading to speech pathology assessment. None of this is available at home or in a nursing facility.

Daily Necessity & Response: Day 2 trajectory, not a snapshot: oxygen weaning from 4 to 2 liters, fever curve improving, but work of breathing persistent and aspiration precautions still failing. Hospital care remains required; next decision point is the repeat swallow study.

Status Change & Avoidable Days: Day 3 status change, explained: stable on room air with a safe modified diet, so acute care needs are met and the level of care is stepped down. The remaining wait for placement is documented as a throughput delay, not as continued medical necessity.

Why It Works

One record for the whole stay: the stated admission expectation satisfies **validation**, the matching pattern of care and daily purpose satisfy **necessity**, and the explained status change with the delay named honestly satisfies **payor review**. Every day carries its own reason and the last one says why it ended.

Section 2 Takeaways

Apply This in Your Next Note

1

At admission, record expected duration, the clinical basis, and why a lower setting is unsafe.

2

Each day, document what changed, what remains unresolved, and the next decision point.

3

State avoidable days plainly; justify each level-of-care change by the finding and the risk.

Example Documentation

“Admission: expect at least two midnights for titrated IV diuresis & telemetry; outpatient care is unsafe given 6L oxygen requirement & creatinine 2.1. Day 2: oxygen weaned to 3L, but weight unchanged & creatinine 2.3—continue IV diuresis with q6h labs; nephrology decision point tomorrow morning. No placement or transport barrier contributing to today’s stay.”

Cross-Payor Defense

One clinically coherent record, payor-specific application

Do not write for an algorithm. Document facts robustly, then map them to the applicable policy, contract, & appeal process.

Managed Medicare Lens

Use Medicare coverage standards and the plan's lawful process

Effective CY2026, an MA plan generally must honor an approved inpatient admission and may reopen it only for obvious error or fraud.



Use in Practice

State the risk and the next decision point.

Managed Medicare Triggers

Reduce empty fields that make the case look routine

Common vulnerabilities include no severity narrative, no consequence of early discharge, no hospital-only service, and no response-to-therapy update.



Use in Practice

Connect the finding to the service and setting of care.

Medicaid Lens

Program & MCO requirements vary

Use a maintained payor matrix. The clinical record should establish acute need, safety risk, functional impact, treatment intensity, and trajectory.



Use in Practice

Ask what evidence
changes the decision.

Commercial Payor Lens

Contract & policy language matter

Avoid assuming that one plan's criteria, submission window, or appeal definition applies to another. Preserve the same accurate clinical story.



Use in Practice

State the risk and the next decision point.

Payor Matrix

Operationalize variability outside the provider note

Track current policy, contract language, authorization rules, documentation requirements, peer-to-peer windows, appeal levels, and escalation contacts.



Use in Practice

Connect the finding to the service and setting of care.

Three-Review Stress Test

Can the same note answer all three reviewers?

Clinical validation: Is the diagnosis supported?

Medical necessity: Why hospital care?

Managed care: How do facts meet the applicable rule?



Use in Practice

Ask what evidence changes
the decision.

Evidence Packet

Build an appeal around the decision under review

Lead with the disputed decision, then present the strongest clinical facts, treatment intensity, trajectory, and risk. Avoid a chronological chart dump.



Use in Practice

State the risk and the next decision point.

Clinical Example

One Record, Three Reviewers: Defending an MA Plan Denial

The case: 66-year-old Medicare Advantage member admitted with an upper GI bleed; plan denies the inpatient stay after discharge

Weak Appeal: Chart Dump



“Appeal attached. Please see the medical record. Patient met inpatient criteria.”

A chart dump with a cover letter. It never names the decision under review, cites no severity narrative or hospital-only service, and asks the reviewer to build the argument—so they build the other one.

Defensible Packet: Facts Mapped to Policy



Severity Narrative: Hematemesis with hemoglobin falling 12.4 to 7.8 in 6 hours, HR 118, SBP 88 on arrival, on apixaban for atrial fibrillation. Forrest IIa ulcer with a visible vessel, clipped and injected at endoscopy.

Hospital-Only Service & Consequence: Hospital-only services named: urgent endoscopic hemostasis, 2 units of transfusion, IV Protonix infusion, serial hemoglobins every 6 hours, and reversal-capable monitoring. Early discharge risks rebleeding at a 15 to 30% rate with no access to urgent endoscopy.

Response to Therapy: Response to therapy stated in comparative terms: hemoglobin stabilized at 9.1 across three draws, no recurrent melena, and anticoagulation restarted on day 2 without rebleeding—the observation window that justified the second midnight.

Payor Application & Appeal: The appeal leads with the decision under review, applies Medicare coverage standards rather than the plan’s internal screening tool, and notes the admission was authorized at the time—reopenable only for obvious error or fraud. Filed inside the contractual window from the payor matrix.

Why It Works

One record, three reviewers: the hemoglobin drop and endoscopic findings satisfy **validation**, the hospital-only services and rebleeding consequence satisfy **necessity**, and the coverage standard plus timely process satisfy **payor review**. The facts never change; only the policy they are mapped to changes.

Section 3 Takeaways

Apply This in Your Next Note

1

Write one clinically complete story; leave payor-specific rules to the payor matrix, not the note.

2

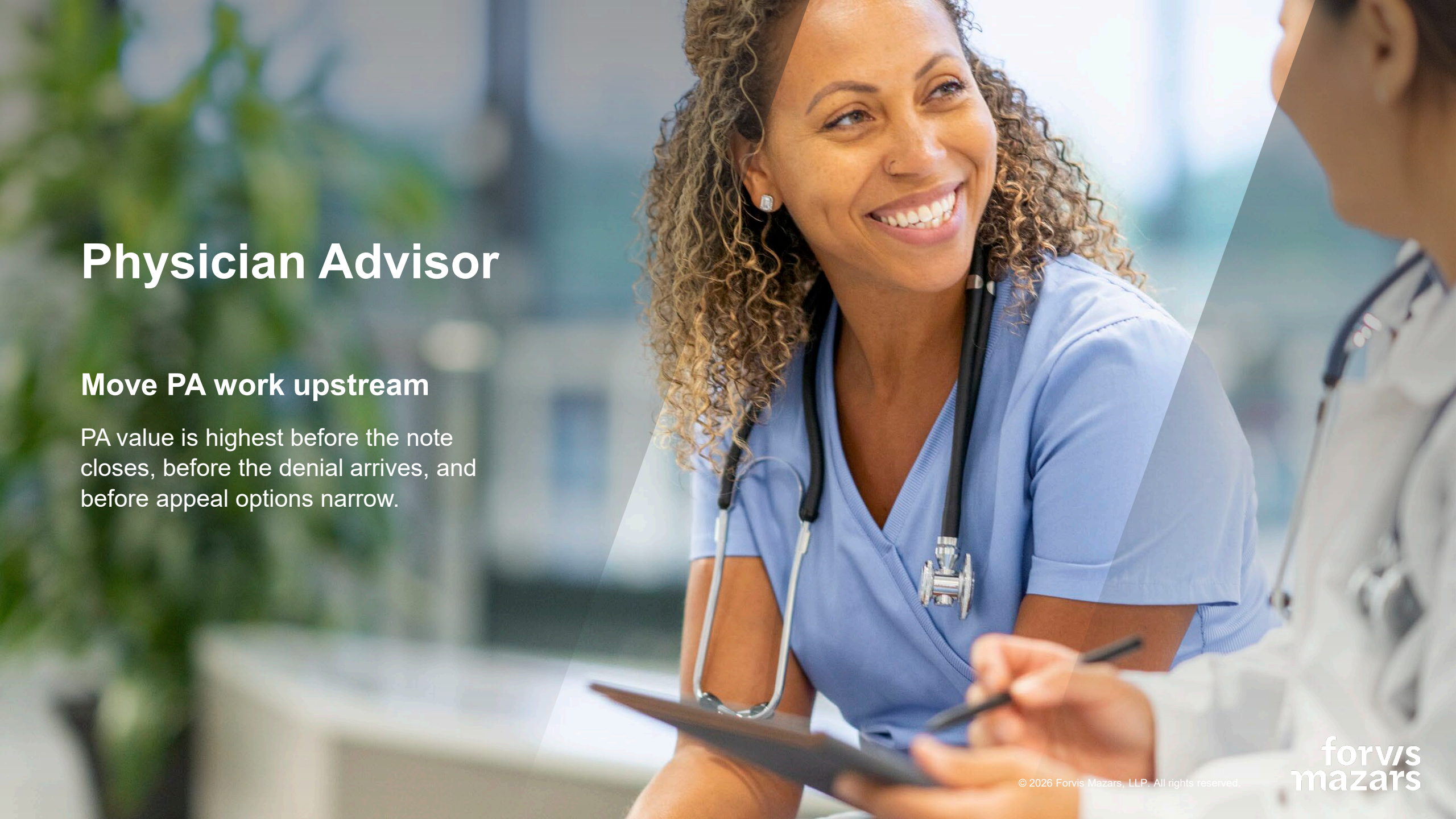
Close the gaps reviewers exploit: severity, hospital-only service, consequence of early discharge.

3

Stress-test the note against all three reviewers before it closes and lead appeals with the disputed decision.

Example Documentation

“Hospital-level need: hypoxemia requiring 6L HFNC, acute kidney injury with creatinine 2.1 → 2.3, & IV diuresis titrated every 6 hours with telemetry. Discharge today risks recurrent pulmonary edema & respiratory failure. Expectation of a two-midnight stay documented with the complex medical factors above; plan authorization, peer-to-peer window, & appeal levels tracked in the payor matrix.”



Physician Advisor

Move PA work upstream

PA value is highest before the note closes, before the denial arrives, and before appeal options narrow.

PA as Clinical Translator

Coach in peer language

Ask: What are you worried will happen if the patient leaves today? Which findings make this diagnosis the best explanation?



Use in Practice

Ask what evidence
changes the decision.

Close Clinical Validation Risk

Test the diagnosis against the whole presentation

Look for discordant indicators, unresolved contradictions, copy-forward diagnoses, absent organ impact, and weak linkage between disease & treatment.



Use in Practice

State the risk and the next decision point.

Four-Sentence Necessity Model

A concise structure for high-risk cases

1. Immediate clinical concern.
2. Serious differential or complication risk.
3. Why inpatient monitoring or treatment is required.
4. Harm likely without admission or continued stay.



Use in Practice

Connect the finding to the service and setting of care.

Peer-to-Peer Structure

Instability → uncertainty → intensity → risk → alternative

Open with current risk, identify unresolved questions, explain hospital-level services, and state why observation or discharge is insufficient.



Use in Practice

Ask what evidence changes the decision.

30-Second Opening

Make the ask explicit

“This patient remains unstable because ____.
We are actively treating with ____.
The unresolved risk is _____. A lower level is
unsafe because _____.”



Use in Practice

State the risk and the
next decision point.

Case 1:

Acute Neurologic Decline

Negative initial imaging does not erase evolving risk

New confusion and focal weakness require a ranked differential, serial neurologic assessment, and a reason the evaluation cannot safely occur at a lower level.

Case 2:

Respiratory Instability

Support trends matter more than one saturation

Document oxygen escalation, work of breathing, failed interventions, suspected mechanism, and the threshold for ICU transfer or ventilatory support.

Case 3:

Metabolic Derangement

Trends become meaningful when linked to organ risk

Connect worsening laboratory values to symptoms, organ consequences, failed response, monitoring frequency, specialty management, and contingency planning.

Case 4: Sepsis

The diagnosis word and clinical support must align

Document suspected source, host response, organ dysfunction, treatment, competing explanations, and trajectory. Follow organizational validation policy.

Team Workflow

Review one story through four roles

1. CDI: diagnosis support
2. UR: level of care
3. Quality: severity and outcome context
4. PA: coaching and defense

Align triggers, escalation, and feedback.



Use in Practice

Ask what evidence changes the decision.

Clinical Example

The Peer-to-Peer: Four Sentences That Hold the Admission

The case: 59-year-old woman with symptomatic hyponatremia, sodium 116; the plan is pushing for observation

Weak Opening: Lab-Led



“Sodium is low at 116. We’re giving fluids & rechecking. She meets criteria for inpatient.”

A lab value and a plea. It opens with a number instead of risk, never names what could go wrong, and cites criteria to a peer physician—the one audience that does not respond to them.

Peer-to-Peer: The Four-Sentence Model



1. **Immediate Concern:** “She remains unstable: sodium 116 falling from 128 in 48 hours, with confusion and one witnessed seizure in the ED. This is symptomatic, not incidental.”
2. **Unresolved Differential:** “The mechanism is unresolved: SIADH versus thiazide effect versus adrenal insufficiency. Urine studies are pending and each answer changes the treatment in a different direction.”
3. **Why Hospital-Level:** “We are actively treating with hypertonic saline, sodium checks every 2 hours, fluid restriction, & neurologic assessments—correction must stay under 8 mEq in 24 hours.”
4. **Harm Without It, & the Ask:** “A lower level is unsafe: under-correction risks further seizures & herniation, over-correction risks osmotic demyelination. Observation cannot deliver 2-hour labs with titration. I am asking you to uphold the inpatient admission.”

Why It Works

Four roles, one story: the symptomatic presentation and sodium trend satisfy **validation**, the two-hour titration and neuro checks satisfy **necessity**, and the explicit ask with bidirectional harm satisfies **payor review**. Instability, uncertainty, intensity, risk, alternative, in that order, in under a minute.

Section 4 Takeaways

Apply This in Your Next Note

1

Coach in peer language: what happens if this patient leaves today, and which findings prove the diagnosis?

2

Use the four-sentence model on high-risk cases: concern, risk, required service, harm without it.

3

Intervene before the note closes; align CDI, UR, Quality, and PA on shared triggers and feedback.

Example Documentation

“Immediate concern: hypoxemic respiratory failure on 6L HFNC. Serious risk: flash pulmonary edema & cardiorenal decline. Hospital-level care is required for telemetry, q6h labs, & titrated IV diuresis. Without continued inpatient stay, harm from recurrent decompensation is likely. Framing used in today’s peer-to-peer.”

In Summary

The rule: One patient story, clearly written, addresses the information needs for all four audiences.

The Habit to Break



Documenting what happened & hoping the reader supplies the reasoning.

Findings, orders, and status lines are data. Denials, queries, and audits all turn on the thinking that connects them. That thinking only counts if it's on the page, in your words, on the day you had it.

What to Carry Forward



1. **Name the Physiology:** State the clinical problem and the severity behind it, not the lab that hinted at it. Specificity in the diagnosis helps improve defensibility downstream.
2. **Justify the Level of Care:** Say what is being done that only a hospital can do and what would happen at a lower level. Necessity is an argument, never a checkbox.
3. **Carry the Risk Each Day:** Improving is not the same as resolved. Name the risk that remains, what you are watching for, and why today still requires this setting.
4. **Show the Trajectory & Ask Plainly:** Let the record show response to treatment and where the plan is heading. When you appeal or take the call, map your facts to their policy and state the decision you want.

The Bottom Line

You are not writing for one audience. The same note is read by **coders, reviewers, payors, and attorneys**. A note that shows **your reasoning** satisfies all four at once. Writing it **contemporaneously**, in plain clinical language, helps establish a defense before anyone asks for it.

Next in the Series

Establishing an Enterprise Clinical Documentation Ecosystem

Leading aligned, coordinated documentation efforts across multidisciplinary, interconnected teams.



Part 2 taught how to make documentation defensible. Part 3 explores how executives can lead efforts to implement coordinated workflows and metrics, foster a culture of accuracy and consistency, and build scalable governance models.

Four Questions to Take Forward

- 1** | What is happening physiologically?
- 2** | Why is hospital-level care required?
- 3** | What risk remains today?
- 4** | How is trajectory changing the plan?

Contact

Forvis Mazars

Barb Whitlock

Lead Consultant

Healthcare Performance Improvement

barb.whitlock@us.forvismazars.com

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