



Medical Scribe

Education Program Approval Manual

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Additional documents (available for download on the AHDI website: <http://www.ahdionline.org>)
AHDI Medical Scribe Model Curriculum

Purpose of the Manual

Welcome to the Medical Scribe Education Program Approval Manual (herein referred to as the “Manual”). This Manual provides the guidelines, policies, and procedures for medical scribe education programs (“Programs”) seeking approval or re-approval from the Association for Healthcare Documentation Integrity (AHDI) by the Approval Committee for Certificate Programs (ACCP). The guidelines are designed to facilitate an effective and efficient process of decision-making regarding the approval of a medical scribe program.

About AHDI

AHDI is the world’s largest not-for-profit association representing individuals and organizations in healthcare documentation. AHDI is tax-exempt under Section 501(c)(6) of the Internal Revenue Code and AHDI’s exempt purpose and mission is to protect the integrity of patients’ health information through continuous workforce development and the support of practitioners and industry partners.

AHDI sets and upholds standards for education and practice in the field of healthcare documentation to ensure the highest level of accuracy, privacy, and security of healthcare documentation to protect public health, assure patient safety, and improve quality of care for healthcare consumers. This is accomplished by monitoring standards through the AHDI Healthcare Documentation Education Program Approval process, Medical Scribe Education Program Approval process, the AHDI Code of Ethics, certification of practitioners as Registered Healthcare Documentation Specialists (RHDS), Certified Healthcare Documentation Specialists (CHDS), Certified Medical Transcriptionists (CMT), and Certified Healthcare Documentation Professionals (CHDP), Certified Healthcare Documentation Professional-Scribes (CHDP-S), and the support of quality assurance programs.

AHDI advocates to legislative and regulatory agencies and standard-setting bodies to ensure that issues of importance to healthcare documentation specialists and the industry are addressed. AHDI also provides professional development through awareness of healthcare documentation issues and concerns, through the improvement and application of problem-solving techniques, through leadership opportunities, and by fostering an attitude that promotes the healthcare documentation profession.

Introduction to Program Approval

Approval is a process of external peer review in which an organization grants public recognition to a program of study that meets established qualifications and educational standards. Approval of a specialized academic course of study is known as program approval. Participation in an approval process is voluntary since there is no legal requirement for specialized programs to participate.

AHDI’s program approval process was instituted to identify programs that:

- adhere to the AHDI Model Curriculum for Medical Scribes,
- maintain sound educational programming,
- produce competent entry-level medical scribes, and
- provide assurance of consistency and quality outcomes for medical scribe education.

Programs must comply with specific educational and institutional criteria as established by AHDI to become an Approved Program. Such criteria have been published and widely circulated by AHDI, and AHDI will continue to publish and circulate any revised or updated versions of the criteria. There is no formal accreditation process for medical scribe programs currently.

The approval program, governed by AHDI's Approval Committee for Certificate Programs (ACCP), is a peer-review process in which programs submit self-studies that are reviewed to determine whether the program meets certain published standards and criteria. The ACCP does not conduct a site visit or other formal on-site survey of education programs, but instead requires programs to attest to the accuracy and validity of the materials provided and the representations made by the programs in the program approval process. The AHDI Board of Directors has oversight of the ACCP.

Approved Program status indicates that a program has met the standards in AHDI's *Model Curriculum for Medical Scribes* and offers a high-quality medical scribe education as demonstrated in the self-study. It also indicates the program's commitment to the purposes and goals of AHDI Approval. A program is *Approved* after the ACCP has determined through the evaluation process (outlined in this Manual) that the program meets the published standards and criteria. Throughout this Manual, programs that have achieved the status of Approved will be referred to as "Approved Programs."

Approval of a healthcare documentation program is *not* required for its graduates to apply and sit for any AHDI credentialing examination, including the CHDP and CHDP-S.

AHDI Model Curriculum for Medical Scribes

The *Model Curriculum for Medical Scribes* ("Model Curriculum") was developed by AHDI to assist educational institutions in the development of medical scribe educational programs. A program's adherence to the *Model Curriculum* carries no explicit or implicit assurances of approval. However, programs must comply with *Model Curriculum* criteria to be approved. The *Model Curriculum* can be downloaded from the AHDI website.

Healthcare Documentation Roles

In 2012, the AHDI Board of Directors adopted the title *healthcare documentation specialist* to reflect the evolving responsibilities and services performed by medical transcriptionists in the creation of accurate and comprehensive patient care records. This alternate title for medical transcriptionists was adopted in the 5th edition of AHDI's *Model Curriculum for Healthcare Documentation Programs*. The changes in healthcare information and documentation continue to offer new opportunities for well-educated, well-trained individuals; and this latest edition has been repurposed as an educational program for a broadly conceived suite of still-emerging roles under the label of healthcare documentation.

AHDI believes that the expanding and emerging healthcare documentation roles build upon the core knowledge and skill sets of traditional medical transcription. The title *healthcare documentation specialist* encompasses individuals who build on the core knowledge and skills to follow varied career paths. Healthcare documentation specialists are trained to look for and identify potential errors in the medical record, no matter how the record was created. Healthcare documentation specialists forge a partnership with clinicians to ensure accurate and complete documentation—working together for patient safety.

In 2021-2022, the Credentialing Commission for Healthcare Documentation (CCHD) developed the Certified Healthcare Documentation Professional credential and the Certified Healthcare Documentation Professional-Scribe micro-credential to assess competency in healthcare documentation. Anyone who participates in documenting patient health care is eligible to take the CHDP, including but not limited to practitioners who document patient care in the health record, scribes, clinician-created documentation auditors/analysts, and allied healthcare professionals.

Benefits of Program Approval

Approval is beneficial because it:

1. Identifies specialized programs that meet established standards of educational quality.
2. Stimulates ongoing improvement of educational standards by involving faculty and staff in self-evaluation and planning.
3. Promotes a better understanding of the goals of professional medical scribe education.
4. Provides reasonable assurance that medical scribes possess necessary job-readiness skills upon entering the profession.

AHDI Approval Process at-a-Glance

1. School submits a Preliminary Program Assessment (“PPA”) and payment of fee.
2. Within 30 days of AHDI receiving the Preliminary Program Assessment and fee, the school will be notified if the education program is a candidate for the program approval process.
3. Following a successful Preliminary Program Assessment, programs submit the Self-Study Application fee and will receive access to Teams, our secure electronic submission platform, where the school may complete the Self-Study Application. All Self-Study materials are submitted through Teams for formal review and potential recommendation to the ACCP for approval.

Please continue reading for complete details on the approval process requirements, schedule, and fees.

Program Approval Fees

Payment of fees is an obligation of Approved Programs. **All fees are nonrefundable.** Payment of approval fees must be in US dollars and paid in full. Please refer to the approval process step outline (below) for details on submission methods and deadlines.

For new applicants, Preliminary Program Assessment fees are due at the time of application submission. The Self-Study Application fee will be invoiced upon approval of the program’s PPA and is due within 30 days of receipt of invoice. All fees are nonrefundable, and payment must be received prior to gaining access to Microsoft Teams.

Schools must submit their program for renewal every three (3) years. For renewals, Self-Study Application fees will be invoiced 6 months prior to the renewal deadline and are due within 30 days of receipt of invoice. Extension and appeal fees will be invoiced and due upon receipt. All fees are nonrefundable, and payment must be received prior to gaining access to Microsoft Teams.

The ACCP reserves the right to withdraw approval from an Approved Program that, after written notice of failure to submit required payment, fails to meet its financial obligations within 30 days of receiving such written notice.

Approval Administrative Fees (Fees are subject to change)	AHDI Educational Member Fee	Regular Fee
Preliminary Program Assessment	\$100	\$100
Self-Study Application	\$1,200	\$1,500
Annual Report	Included with Self-Study fee	Included with Self-Study fee

Approval and Re-Approval Pending Change Extension	\$100	\$100
Appeal	\$500	\$750
Program Renewal (every 3 years & preliminary program assessment not required)	\$1,200	\$1,500

AHDI Educational membership is \$200 per year. To join or renew your membership, please visit www.ahdionline.org. Membership in AHDI is not required for a program to apply for and obtain Approved Program status.

Approval Committee for Certificate Programs (ACCP)

AHDI’s Approval Committee for Certificate Programs (ACCP) evaluates programs that have voluntarily opted to submit their program and curriculum for approval and determines whether such programs comply with AHDI’s *Model Curriculum for Medical Scribes*. Furthermore, the ACCP reviews the materials submitted by the programs to ensure that Approved Programs have a sound educational program, produce competent entry-level medical scribes, and assure consistency and high-quality outcomes for medical scribe education. Programs must comply with specific educational and institutional criteria as established and published by AHDI to be eligible for approval and must continue to comply with such criteria to be eligible for renewal of approval.

AHDI Organization Structure and ACCP Authority

The AHDI Board of Directors has oversight over the ACCP. The ACCP is given the authority to manage the approval program according to the policies and procedures approved by the Board. The ACCP will annually review the policies and procedures and make any recommendations for change to the Board for consideration and approval.

ACCP Composition, Qualifications, and Terms

The chair and members of the ACCP are selected by the President of the AHDI Board of Directors. The ACCP chair must be an Individual Professional member, and ACCP committee members must be an AHDI Individual Professional or Sustaining member in good standing, with a professional background in education or healthcare documentation.

The ACCP chair may serve up to two consecutive 1-year terms. ACCP members serve a 2-year term. Terms begin on September 1 and end on August 31. The ACCP will be assigned board and staff liaisons.

The ACCP shall be composed of a minimum of 5 members, including the chair. All ACCP members are voting members and serve as program reviewers. If a vacancy occurs that brings the number of members to less than the minimum requirement of 5, then a new member will be selected and appointed in a timely fashion by the President of the AHDI Board of Directors.

ACCP members cannot have economic or personal interests or other ties to a program under review that would impede impartiality or neutrality in the review process. All ACCP members are required to sign a duty of confidentiality (see Appendix A) and conflict of interest acknowledgement and disclosure form (see Appendix B). Any ACCP member with a conflict with respect to a program under review is required to disclose such conflict and the ACCP chair will determine whether the ACCP member should be recused from the pertinent discussion and vote.

Review-Approval Timelines and ACCP Meetings

The ACCP meets quarterly to review applications for Approval. First-time program approval may take 6 to 12 months for the initial evaluation of the Preliminary Program Assessment (PPA), Self-Study Application peer review and recommendations, and voting by the full ACCP committee.

The timeline and due dates established guide the review process so sufficient time is available for both the creation and study of lengthy documents, communication between program applicants and the ACCP, and the request and return of any additional or clarifying information. Adherence to the due dates is imperative. Failure to meet the required due dates will immediately jeopardize the review and the approval status of the program.

Quarterly ACCP Meetings:

- Quarter 1 – March
- Quarter 2 – June
- Quarter 3 – September
- Quarter 4 – December

Due date for material submission:

- Self-Study materials must be submitted at least 8 weeks prior to a quarterly meeting date; these dates will be posted on the AHDI website.
- If “Approval Pending Change” or “Re-Approval Pending Change” has been issued, additional material must be submitted 4 weeks prior to the quarterly meeting date specified by the ACCP in the Approval Pending Change notice.

NOTE: Meeting dates and deadlines are posted on the AHDI website.

The ACCP has the authority to schedule a special meeting or reschedule a quarterly meeting as needed for unique circumstances. Notice will be given to Programs affected by a change in the meeting schedule. Please review the [Step-by-Step Guide](#) to the Approval Process for complete details on the process, timelines, and due dates.

Length of Program Approval

A Program’s approval period expires 3 years from the last day in the quarter in which the program was approved. For example, a program approved at a third-quarter meeting in 2023 is approved through September 30, 2026. For new applicants, the approval period of 3 years starts from the point at which they first become Approved. For renewals receiving Renewal of Approval, the approval period of 3 years starts from the quarterly date in which their renewal expired.

A program’s approved status must be maintained through the [Annual Report process](#).

Renewal of Approval Status

Three years from the end of the quarter in which the program has been Approved, the program will be due for Renewal of Approval. Renewal fees are invoiced 12 months prior to the renewal deadline and are due within 30 days of receipt of the invoice. All documents must be submitted at least 8 weeks in advance of an ACCP quarterly meeting prior to the renewal deadline.

If material is not submitted by the deadline it may result in a denied vote by the ACCP, at which time the program will be removed from the Approved Program Listing on the AHDI website and the program may

no longer advertise its Approved status or use the Approved Program logo. These denied Programs must re-apply and go through the approval process to become an Approved Program and to be returned to the Approved Program Listing on the AHDI website. It is the responsibility of the Program to adhere to the necessary schedule for renewal; at the time of original program approval, AHDI will include the renewal date in the approval letter.

The renewal process for Approved Programs is slightly abbreviated from the initial submission process. During the renewal period, a Preliminary Program Assessment is not required, and your program will go directly to the full Self-Study Application process. Please refer to [Program Approval Fees](#) section and [Step 2—Self-Study Application; eSubmission Process; Teams](#) for more information on renewal submission.

Step-by-Step Guide to the Approval Process, Policies, and Procedures

Step 1: Preliminary Program Assessment *(for first-time program approval only)*

The first step toward Approval is to electronically submit the Preliminary Program Assessment, the Declaration and Release, and the administrative fee. The documents will be reviewed by an ACCP member and your program will receive feedback within 30 days as to whether or not the Program meets minimum requirements to proceed to the next step in the application process, including submission of the required accompanying materials and fees for the Self-Study Application (see below for Step 2). Acknowledgment that a Program has met the minimum requirements of the Preliminary Program Assessment and may continue to the Self-Study Application does not represent or imply a guarantee, acceptance, or approval of the educational program by the ACCP or AHDI. The Self-Study process will determine whether, in detail, the Program meets all standards for AHDI approval.

Please note that this form, the Declaration and Release, AND payment MUST BE RECEIVED by AHDI before your Preliminary Program Assessment can be reviewed.

View the [Preliminary Program Assessment form](#) and the Declaration and Release (Appendix C).

Step 2: Self-Study Application; eSubmission Process; Microsoft Teams

Following notification that, on the basis of the Preliminary Program Assessment review, the Program is a candidate to proceed with the approval process, the second step is to submit the Self-Study application fee and be granted access to Microsoft Teams to submit Self-Study material. The Program has up to 1 year after the notification to proceed from the PPA to submit the completed [Self-Study documents](#). If the Self-Study application is not completed within 1 year, the program must start the process over with the Preliminary Program Assessment and the applicable fees must be paid again.

The ACCP meets quarterly and Self-Study applications will be reviewed at the next quarterly meeting following submission of Self-Study documents, provided that the Self-Study materials are received by the ACCP at least 8 weeks prior to the quarterly meeting. If the Self-Study documents are received less than 8 weeks prior to a quarterly meeting, they will be reviewed by the ACCP at the following quarterly meeting. Self-Study materials must be submitted at least 8 weeks before the quarterly ACCP meeting to provide the ACCP reviewers time to conduct the review. An extension on initial material deadline is not allowed.

Please note that applications will not be forwarded to reviewers until ALL competencies are completed on your e-submission documentation. If documentation or material appears to be missing, the Programs Coordinator will notify the Program representative as soon as possible, requesting that the missing items be provided within a specified timeframe not to exceed 7 days.

The Self-Study Application process is paperless, and all submissions are done electronically using Microsoft Teams, AHDI's online e-submission project management platform.

Microsoft Teams will connect educational programs entering the approval process to an interactive platform designed to assist Programs through the submission process. There you will have access to a detailed list of required competency materials, a calendar with program deadlines and reminders, and a file storage area that will allow you to upload and track all of your current and pending submissions in a secure, user-friendly environment.

Once the school's Preliminary Program Assessment has been completed and the Program begins the approval process, the Program is given access to Microsoft Teams to begin building the Self-Study Application.

When a Program is seeking renewal, access to Microsoft Teams will be granted once the renewal fee is paid to begin the Self-Study Application. Once the Self-Study documentation has been completed, the Program's access to Microsoft Teams will be closed, and the ACCP peer reviewers will be given access to evaluate the material submitted. The ACCP peer reviewers then submit their recommendation at the next ACCP quarterly meeting for which the submission is eligible. The ACCP decisions and approval status are detailed in Step 4.

View the [Self-Study Guide, Application, and Checklist](#)

Step 3: ACCP Review of Self-Study Submission

After submission, the Self-Study Application and documentation will undergo a review by ACCP reviewers who will assess your program based on the stated criteria. Following the review, ACCP reviewers submit their recommendation to the ACCP committee. A two-thirds vote of the ACCP members at a meeting is required for final approval decision.

The ACCP Chair and Programs Coordinator will assign a minimum of 2 ACCP members to review each program (the "Review Team"). The Review Team will study the Self-Study submission of the given program and complete a rubric indicating the criteria that has been satisfied, which will be presented to the ACCP along with their recommendation for approval at the following quarterly meeting.

Step 4: ACCP Decisions & Approval Status

The Approval decision results in a formal letter to the program representative within 7 days of the completion of the review and the final approval decision by the ACCP.

The following actions may be taken by the ACCP with regard to medical scribe education programs that apply for approval or re-approval.

1. Grant approval or re-approval
2. Defer action on applications for approval or re-approval
3. Grant approval pending change or re-approval pending change

4. Extend a program's approval while its application for re-approval is being considered or reviewed
5. Issue a warning to an Approved Program with corrective action
6. Place an Approved Program on probation
7. Withdraw approval
8. Deny approval

When reviewing programs, the ACCP will complete the rubric, which is based on the *Approval Criteria for Medical Scribes Programs*. A report containing a copy of the rubric will be provided to the school after the ACCP review and vote.

The ACCP will vote to make one of the following determinations after review of a Self-Study from a new applicant or renewal:

- **Approved:** The program has met the published criteria for approval and has been approved for a 3-year period. The ACCP will inform the AHDI Board of Directors of the Program's Approval status. During the 3-year approval period, annual reports from the Program will be required in order to maintain approval.
 - Programs receiving approval will receive the following:
 - Listing on the AHDI website as an Approved Program. Listing to include the Approved Scribe Program's logo, description, funding options, contact information, and link to the Program's informational page.
 - Listing in select AHDI publications, as determined by AHDI
 - Certificate of AHDI Program Approval
 - Permission to represent program as Approved Program pursuant to the terms and conditions outlined in this Manual.
- **Approval Pending Change (new applicant):** The Program has not met all areas of the stated Program Approval criteria and additional information or a change needs to be submitted 4 weeks prior to the next quarterly meeting. There is no charge for the first extension of time to submit additional information. If the Program is granted "approval pending change" after an additional review by the ACCP, the Program can pay an approval-pending-change extension fee and must submit additional information for review 4 weeks prior to the next quarterly meeting -OR- move to "denied approval," after which the Program would need to reapply. An extension will allow additional time to meet conditions. If approved, the 3-year approval term will start as of the approval date. Each new program applicant will be allowed up to 2 paid extensions.
 - Programs that are new applicants receiving "approval pending change" will not be recognized on the AHDI website or any other publications until approval is granted. Furthermore, Programs shall not advertise approval of any type until approval is achieved.
- **Re-Approval Pending Change (renewals):** The Program has not met all areas of the stated program criteria and additional information or a change needs to be submitted 4 weeks prior to the next quarterly meeting. There is no charge for the first extension of time to submit additional information. If the Program is granted "re-approval pending change" after an additional review by the ACCP, the Program can pay a re-approval-pending-change extension fee and must submit additional information for review 4 weeks prior to the next quarterly meeting -OR- move to "denied approval," after which the program would need to reapply. An extension will allow additional time to meet conditions but will not extend the actual approval date. If approved, the new 3-year approval term will start as of the original or reapproval date. Each renewing program applicant will be allowed only 1 paid extension per 3-year period.

- Programs that are up for renewal receiving “re-approval pending change” will continue to be recognized on the AHDI website or any other publications, and Programs are allowed to continue to advertise approval, until the point at which they would be officially “denied” approval.
- **Denied Approval:** The Program does not meet *Scribe Model Curriculum* and Program Approval Criteria and all available extensions have been used or electively declined.
 - If approval is denied, the Program will be provided a report of all aspects of the program that are not in compliance.
 - The Program will be allowed to re-apply for approval at a future time.
 - The Program has the option to “Appeal” the decision made by the ACCP. See [“Appeal Process” section](#).

Note: All fees are nonrefundable.

Step 5: Annual Report (for Programs currently approved)

An annual report is reviewed at the ACCP meeting taking place during the same quarter as the effective date of approval for each Approved Program. An Approved Program’s annual report is due 4 weeks prior to quarterly ACCP meeting. Notification will be sent to the program’s representative in advance of the due date. It is the responsibility of each Approved Program to maintain current contact information on file with AHDI.

The Annual Report Form is in Appendix G of this manual. An ACCP member will be assigned to review the report and present at the quarterly meeting. The ACCP considers the Annual Report to be such a significant communication tool that failure to supply it may result in a warning, probation, or withdrawal of approval.

The ACCP will make one of the following determinations after review of an **Annual Report submission**:

- **Approved:** Program has continued to meet the approval criteria.
- **Warning:** A warning may be issued to an Approved Program if the program is not in compliance with the published guidelines. The warning may require the Program to take corrective action concerning specified areas in which it is not in compliance with the guidelines, to refrain from certain actions, or to initiate certain actions. The warning is in effect until a specific date, at which time the Program’s status will be reconsidered. A warning does not affect the approved status of the Program and is not made public.
- **Probation:** When a Program fails to respond to conditions imposed on it by a warning, or when it deviates significantly from the published guidelines or policies but not to such an extent as to warrant a withdrawal approval, the Program may be placed on probation. Probation is in effect until a specific date, at which time the Program’s status will be reconsidered. The approved status of the Program continues during the probation period. The probationary status is not made public.
- **Withdrawal of Approval:** If, following the warning or probation period, the Program continues to be out of compliance with the published guidelines for approval, approval will be withdrawn. The Program will be provided a report of all aspects of the program that are not in compliance. The Program will be removed from the Approval Programs listing(s) and Programs must remove

all references to AHDI approval. The Program has the option to “Appeal” the decision made by the ACCP. See [“Appeal Process” section](#).

The outcome of the Annual Report review will be communicated via email to the program representative *within 30 days of the completion of the review and determination by ACCP*. All fees are nonrefundable.

Self-Study Guide, Application, and Checklist

Following the successful submission of a [Preliminary Program Assessment](#) or when an Approved Program is up for renewal, the Self-Study process must be completed. The Self-Study process and documentation will demonstrate that your program meets the criteria for approval and follows the AHDI *Scribe Model Curriculum*. All documentation must be submitted electronically via Microsoft Teams, which will require that your documents are prepared in the format outlined below.

Self-Study Guide

1. **Organizational Structure and Financial Viability.** The organization offering healthcare documentation instruction (academic institution, healthcare organization, private company, etc.) must provide the following:

a. **Financial Viability/Resources.** Demonstrate financial viability via auditor report, budget, proof of financial bond with government Department of Education, etc. Provide documentation of financial standing of organization as a whole. This must include a statement verifying adequate financial resources to *support the program* and to *provide refunds* to students should it become necessary. In addition, provide copies of institutional and program budgets.

- Attach auditor statement or CPA review/financial report on the program or school, -OR- proof of financial bond with government Department of Education.
- Attach program budget for current year.

b. **Licensing or Accreditation, or both.** The school or institution must be recognized by appropriate governmental entities such as state or other governmental educational licensing boards or regional accrediting agencies.

- Attach copy of school license, accreditation, or official document from state, county, or other governmental Department of Education where the school is located.

c. **Advisory Committee (AC).** The program must have an Advisory Committee, which must comprise industry and community leaders—potential employers or workforce development representatives or both—and must meet at least 1 time per year. The AC cannot consist simply of school or company personnel.

- List Advisory Committee Member and roles/positions in industry or community.
- Provide minutes of at least one meeting of the AC from the past year.

2. **Personnel: Faculty and Administration.** *Job descriptions* must be provided for each position including faculty, program directors or managers, and content developers. Include copies of advertisements for job openings as appropriate. It is not necessary to include deans, vice presidents, or anyone above the roles specified here. *Curriculum vitae (CV)* must be provided for all personnel associated with the program. CVs should include credentials, credential numbers if applicable, and name of organization issuing

credentials for verification. Only one CV per individual; if an individual fulfills more than one role, **simply state that in the list of personnel and on the CV.**

a. Documentation for Personnel:

- Provide a list of each individual, title, role/courses taught.
- Provide job description for **each position** (Program Director or Manager, Content Developer, Scribe Course Instructor(s), Instructor for Other Academic Courses).
- Provide policies and procedures or a narrative describing the selection process for **each position.**
- Provide policies and procedures or a narrative describing the method of evaluation for **each position.**

b. **Program Director:** A qualified, full-time program director is overseeing the entire program. A qualified program director holds a Certified Medical Transcriptionist, Certified Healthcare Documentation Specialist, Certified Healthcare Documentation Professional credential *or* a college or vocational certificate in medical transcription/healthcare documentation/SR editing/Medical Scribe *or* 5 years' acute care experience in the healthcare documentation profession *or* a bachelor's degree or higher degree with experience in coordinating and operating an academic program.

- Provide CV for program director or manager.

c. **Content Developer:** At least one member of the content development team must be a Certified Medical Transcriptionist (CMT), Certified Healthcare Documentation Specialist (CHDS), or Certified Healthcare Documentation Profession Scribe (CHDP-S) through the Association for Healthcare Documentation Integrity (AHDI). Expertise in instructional design requires experience or training in the field of education with credentialing as appropriate.

- Provide CV for content developer.

d. **Medical Scribe Course(s):** The medical scribe instructor must be a CHDP-S, CHDS, or CMT. This instructor should be able to prove their qualification to teach through experience, educational training, or both. They should have not only transcription industry experience but also previous experience as an educator or experience as a supervisor, trainer, or quality analyst, or at minimum be closely supervised and mentored by an experienced educator.

- Provide CV(s) for Medical Scribe Course Instructor(s).

e. **All Other Academic Courses:** Instructors for all other courses must have appropriate credentials, degrees, or education to teach those courses.

- Provide CV(s) for All Other Course Instructor(s).

3. **Curriculum and Instruction.** Course content, sequencing of courses, and appropriate learning experiences must be established in accordance with sound educational principles. You must document core competencies necessary for entry-level healthcare documentation practices following the current **AHDI Medical Scribe Model Curriculum**, to include the following content areas:

- ❖ E. **English Language** (Medical Standards of Style incorporating the AHDI Book of Style & Standards for Clinical Documentation, 4th Edition)

- ❖ **M. Medical Knowledge** (Anatomy and Physiology, Medical Terminology, Concepts of Disease, Pharmacology and Laboratory Medicine)
- ❖ T. Technology
- ❖ **H. Medicolegal** aspects of the healthcare record
- ❖ **P. Healthcare Documentation Practice** (including a practicum, be it an externship or simulated professional practice setting)

Note: To facilitate a thorough review, it is a requirement for the school to provide learning management system (LMS) access.

a. **Content Selection and Delivery.** Provide a detailed description (narrative) of how course content is selected, how instruction is delivered, how distance learning or web-based modules and instruction are accomplished, and how professional practice experiences are supervised. Describe the curriculum development process for this program. For example, were new courses developed, were existing courses incorporated, how has the curriculum changed over time.

Provide a detailed narrative of the following:

- Who designed the curriculum?
- How was the curriculum developed?
- How is the instruction delivered? (e.g., campus, distance learning, online)
- If a learning management system is used, identify LMS and provide access with login credentials valid through approval/reapproval (include link and login information with this item).
- Describe practicum experience and supervision (on-the-job or virtual).

b. **Sequencing of Courses and Required Textbooks, Materials, and Resources.** Provide a copy of complete curriculum using Program Course Sequence Grid (Appendix D) and the Required Textbooks, Materials, and Resources Table (Appendix E). The source or brand name and edition for authentic physician encounters must be noted. Encounters from noncommercial sources must be made available for review so that the reviewers can determine its authenticity. Encounters for virtual practicums must be available for review; encounters do not have to be available for review with traditional or onsite practicums. The Book of Style & Standards for Clinical Documentation, 4th Edition, must be included in this table. All textbooks must be commercially published, as defined in the Model Curriculum, 6th Edition. There is no requirement that every course has a commercially published textbook, and it is recognized that not all academic materials must be commercially published materials.

- Complete and attach Appendix D: Program Course Sequence Grid
- Complete and attach Appendix E: Required Textbooks, Materials (print and digital) and Resources Table
- Provide proof that AHDI's Book of Style & Standards for Clinical Documentation, 4th Edition, is included as a required textbook
- Provide proof of a minimum of 10 physician/patient encounters for core content (should include clinic and acute care)
- Provide proof of a minimum of 10 physician/patient encounters for practicum (should include clinic and acute care)

c. **Provide syllabi for each course as outlined below.**

Provide Course Syllabi (one for each course listed on sequence grid), which must include the following:

- Name of course, instructor's name and contact information
- Meeting places and times or web access information, if online
- Course description, course prerequisites and/or corequisites
- Clearly delineated grading scale and requirements for course completion
- Policy regarding late submission of course work and policy regarding retaking course if not passed
- Attendance/participation policy
- Course learning objectives
- Lecture topics for each class
- Individual assignments and timelines for completion (specific page numbers; exercises/activities to be completed; reports/tapes/dictations, including length in minutes, to be transcribed or edited; etc.)
- Methods of evaluation, grading scale, and requirements for completion
- Late submission policy
- Attendance and participation policy

d. Document how the program meets each competency in the Medical Scribe *Model Curriculum*.

Complete the Correlation MSMC Competencies to Medical Scribe Program Curriculum spreadsheet (Appendix F).

e. Instruction and Instructor/Student Interaction. Qualified course instructors must provide formal instruction and direct feedback to students (beyond the information and correction that can be gleaned by the student from textbooks and course materials through self-study). This should include live or recorded lecture, onsite or virtual classroom discussion, and directed feedback during practical portions of the educational program. Adequate qualified instructor support must be supplied for each student. “Autograding” and “autocompare” without regular instructor intervention will be considered insufficient.

Provide a narrative detailing how formal instruction and direct feedback are incorporated into the course curriculum, that is,

- (a) describe the interaction between the instructional staff and student,
- (b) identify program management of student progress tracking and provide examples,
- (c) include sample instructor lesson plans for formal instruction, where appropriate.

In addition, provide a narrative detailing student feedback and submit samples (email, message board posts, progress reports, etc.). Also submit representative samples of *graded student-produced encounters* showing feedback by instructor, from both clinic and acute care. These samples must include an encounter from an exam for medical scribe course. You should include a total of **12 samples from a minimum of 4 students of varying achievement levels.**

- Narrative describing instructor/student interaction.
- Narrative describing how student progress is tracked and submit samples.
- Narrative describing provisions for feedback and samples of feedback.
- Sample lesson plans for formal instruction.
- Sample graded encounters showing feedback, total of 12, to include **final exam for medical scribe course.**

f. **Submit a sample graded comprehensive final exam(s) that covers all core content area** (E, M, T, H, and P), including objective tests for healthcare documentation practice, demonstrating that *AHDI Medical Scribe Model Curriculum* competencies are covered in the test questions.

- Graded final exam for English, Medical, Technology, Medicolegal, and Healthcare Documentation Practice competencies.

g. **Provide student/instructor ratio.** No maximum or minimum for the student/instructor ratio; however, an appropriate student/instructor ratio is recommended to ensure each student receives adequate feedback.

- Provide the Student/Instructor ratio.

4. Operation of Program

a. **Nondiscriminatory Practices.** Provide a copy of nondiscrimination statement for both employees and students. The school or institution must adhere to nondiscriminatory practices with respect to race, color, creed, sex, age, disabling conditions (handicaps), and national origin for both employees and students.

- Provide a copy of nondiscrimination statement regarding students.
- Provide a copy of nondiscrimination statement regarding staff.

b. **Awarding of a certificate.** Certificates must be awarded *only* to students who have met the criteria for successful completion. Certificates must *not* be awarded for courses or programs not passed. Awarding certificates to students who have not successfully met the criteria for completion is misleading to potential employers, the healthcare industry, and the public. Attach copies of the completion document(s) awarded. Each certificate awarded must be submitted for review. Certificate should clearly state the basis or criteria for the award (do not include student names in samples).

- Attach a copy or copies of each certificate awarded, should include the basis for which the certificate is awarded.

c. **Maintenance of records for student enrollment and evaluation.** Write a narrative describing how records are maintained. These records must be in sufficient detail to document learning progress and achievement. Provide examples (remove names for confidentiality).

- **Provide narrative of student enrollment records and evaluation methods.**
- **Provide samples of student enrollment records and evaluation tracking.**

d. **Student and instructor grievance policies.** Describe how student and instructor grievances are addressed according to policy. Attach copies of written policies and procedures.

- **Provide student grievance policy.**
- **Provide instructor grievance policy.**

e. Student withdrawal and refunds of tuition or fees. Write a narrative describing how this is accomplished.

- Attach a copy of refund policies, procedures, and/or rules and regulations.

f. Placement or Enrollment/Completion Statistics. Provide placement statistics of students who completed the program or enrollment/completion figures or both.

- Describe the process by which enrollment/completion or placement data are determined.
- Provide documentation of employment/placement or enrollment/completion statistics or both.

g. Announcements, advertisements, and promotions. These must accurately reflect current trends in the healthcare documentation profession and the program being offered as well as ACCP-approval status. Programs shall not advertise approval of any type until full approval is achieved. Submit copies of all announcements, advertisements, and promotions, including those of an electronic nature, used to promote the program including but not limited to newspaper ads, periodicals, bulletin posts, etc. Please include website addresses where advertising appears, *including the website address for the program itself, not the school or company.*

- Provide documentation for announcements, advertisements, and promotions which promote the program.
- Provide website address (URLs) where advertising appears.
- Provide the website address (URL) for the program itself, not the school or company.

Appeal Process

Programs have the right to appeal an ACCP decision upon “Denied Approval” or “Withdrawal of Approval” status. A previously Approved Program is removed from the approved program list on the website upon the decision of “Denied Approval” or “Withdrawal of Approval” and during the appeal process. The appeal process is the only official channel for contesting an ACCP decision. The appeal process is as follows:

- The Chief Administrator (or designee) of the institution housing the program must request an appeal in writing to the AHDI President and the ACCP Chair within 30 days of the program’s receipt of the ACCP decision to Deny or Withdraw Approval. The appeal should identify the justification for the appeal and any corresponding evidence or validation. The Program may not rely on any information or documentation unless that information and documentation had been submitted to the ACCP prior to the time the negative decision was made. The administration fee for the appeal process must be submitted at the same time as the appeal request. The AHDI President and ACCP Chair will furnish copies of the request to appeal to all members of the ACCP within 30 days of receipt of the request.
- The AHDI President will appoint an Appeal Committee consisting of three (3) representatives who have no economic or personal interests or other ties to the Program under appeal that would impede impartiality or neutrality in the review process.

- The Appeal Committee will first review the reason for the Appeal and any corresponding evidence or validation for the request. If the request for appeal is substantiated, then the Appeal Committee will review all original application materials and correspondence between the program and the ACCP.
- In reaching its decision, the Appeal Committee will consider the record before the ACCP at the time it made its decision, the program's written appeal statement, as well as the program's responses to questions from the Appeal Committee. The Appeal Committee will base its decision on conditions as they existed at the time of the ACCP's decision and will not consider new evidence not before the ACCP at the time of its decision.
- The Appeal Committee will submit its decision to the ACCP, to affirm or reverse the Approval status originally determined by the ACCP or, if warranted, return the matter to the ACCP with instructions to reconsider the decision based upon specified evidence or information. The ACCP submits a decision to the Appeal Committee within 30 days of receipt of the recommendation. The Appeal Committee decision is final and supersedes the ACCP's decision in an appeal. The Appeal Committee submits their final decision to the AHDI President and ACCP within 30 days and the AHDI President will inform the program officials in writing. If the ultimate decision is to uphold the decision to Deny or Withdraw Approval, such notice will contain an explanation of the reasons for such denial or withdrawal.
- All proceedings in the appeals process will remain strictly confidential.
- Failure to adhere to the specified process for appeal results in significant delay of the appeal.

Voluntary Withdrawal of Approval Status

An Approved Program may voluntarily request its approval to be withdrawn for any reason, or if the program ceases operation.

A Program that voluntarily requests that its approval be withdrawn or that ceases operations must notify AHDI and the ACCP the date that its approval will be withdrawn and must take the following actions:

1. Inform all currently enrolled students and applicants to the program that the program will no longer be approved as of the date of withdrawal of approval and students who graduate after that will not be graduated from an Approved Program.
2. Inform all faculty members, advisors, and members of the institution's staff and administration, in writing, that the program is no longer approved as of the date that approval will be withdrawn.
3. Revise all catalogs, brochures, advertisements, websites, and other written and electronic material used to describe or promote the program to remove any reference or mention of previous approved status.
4. Refrain from any action or communication that would give the appearance that the program is approved after the date that approval is withdrawn.
5. If the program is being discontinued, exercise best efforts to graduate all students before the program is discontinued and/or to facilitate the transfer of students to other programs.

Policy for Reporting Approved Program Changes

Each Program, upon decision to enter into the Approval process with the ACCP, agrees to comply with the Education Approval Policies and Procedures. It is each Program's responsibility to comply with the guidelines presented in this manual, report changes immediately as outlined below, and to follow any other action or provide additional information as requested by the ACCP.

Some types of change that may occur with an Approved Program fall within the mission and scope of the program (e.g., adding new electives, or minor changes in course descriptions) and do not require notification of the ACCP. Other types of program changes, such as adding an educational track with different program structures or changes in personnel, affect the Program's relationship to the ACCP and its Approved Status, and therefore require notification of such changes in the Annual Report (see Annual Report Appendix G).

If for any reason a Program becomes non-compliant with the Education Standards, *immediate notification in writing to the ACCP is required*. If it is unclear whether a change may affect Approval status, any doubt should be resolved by reporting the prospective change to the ACCP in writing immediately. Changes requiring notification to the ACCP include, but are not limited to the following:

- Changing the program title
- Initiating a new program track
- Establishing a new program that shifts the mission
- Merging/combining an Approved program with a non-Approved program
- Significantly changing the level of program resources
- Changing ownership, control, or legal status of the program or institution
- Accreditation, public, legal, or governmental sanctions
- Changing entry requirements
- Unanticipated reduction in program offerings, faculty, and/or enrollment that alters the scope of the program
- Existence of highly publicized controversies among the faculty and/or institution
- Legal, financial, or ethical investigations
- Announcing closure of the program or institution
- Disasters that jeopardize physical infrastructure
- Misrepresentation to the students and public, except in those cases which are accidental and insignificant to the quality of the program

To notify the ACCP of changes, please email documentation to edapproval@ahdionline.org. Following an Approved Program's notification of a change, the ACCP will follow the "[ACCP Procedure for Approval of Change](#)."

ACCP Procedure for Approval of Change

Depending upon the nature of the change, the ACCP has various ways to review and approve a change reported by the Approved Program:

- The ACCP Chair may determine that the nature of the change is acceptable and does not require further consideration.
- The ACCP Chair may determine the change requires review by the ACCP members. In this case, the ACCP Chair may appoint an ACCP member to review the change and report back to the

Chair with a recommendation to approve the change, require additional information within a specified time, or present at the next ACCP quarterly meeting for review.

This policy applies to changes reported by Approved Programs outside of the annual report review cycle. This does not replace the annual report requirements for Approved Programs. In the case of changes reported by Approved Programs outside the scope of the annual report, the ACCP will make one of the following determinations after review of the change:

- **Approved** – The change does not negatively impact the program’s compliance with the approval standards.
- **Warning** – A warning may be issued to an Approved Program if the submitted change is not in compliance with the published guidelines. The warning may require the program to take corrective action concerning specified area(s) that is not in compliance with the guidelines, to refrain from certain actions, or to initiate certain actions. The warning is in effect until a specific date, at which time the program’s status will be reconsidered. A warning does not affect the approved status of the program and is not made public.
- **Probation** – When a program fails to respond to conditions imposed on it by a warning, or when it deviates significantly from the published guidelines or policies but not to such an extent as to warrant a withdraw approval, the program may be placed on probation. Probation is in effect until a specific date, at which time the program’s status will be reconsidered. The approved status of the program continues during the probation period. The probationary status is not made public.
- **Withdrawal of Approval** – Following the warning or probation period, the program continues to be out of compliance with the published guidelines for approval. The program will be provided a report of all aspects of the program that are not in compliance. The program will be removed from the Approved Programs listing(s) and programs must remove all references to AHDI approval. The program has the option to “Appeal” the decision made by the ACCP. See [“Appeal Process” section](#).

The Approved Program will be provided written notification of any decision of the ACCP within 30 days of the decision.

Student Complaints

In the event AHDI or the ACCP receive a complaint by a student attending an Approved Program, the following procedures will be followed:

1. The ACCP Chair will be notified of the student’s complaint. Depending on the nature of the complaint, the ACCP Chair may make one of the following determinations:
 - a. Advise the student to contact the school directly
 - b. Advise the student to contact the Better Business Bureau directly
 - c. Inform the student that his/her complaint is beyond the scope of responsibility of the Approved Program
 - d. Inform the Approved Program of the student’s complaint and open an investigation
2. If an investigation is opened (per 1.d above), the ACCP Chair will appoint an ACCP member without personal or economic interests or any other conflict of interest to investigate the complaint. The ACCP member investigating the complaint may require additional information within a specified time by the Approved Program or student filing the complaint. The ACCP member investigating the complaint will report back to the Chair with a recommendation to:

- a. Close the investigation on the grounds that the complaint was invalid
- b. Present the results of the investigation to the ACCP for review

In the event the results of the investigation go to the ACCP for review, the ACCP will make one of the following determinations:

- **Investigation Closed** – There was either inadequate evidence to support the student’s complaint -OR- the Approved Program was in compliance with the ACCP standards for education approval. ACCP investigations of student complaints are not made public.
- **Warning** – A warning may be issued to an Approved Program if the complaint demonstrates that the Program is not in compliance with the published guidelines. The warning may require the Program to take corrective action concerning specified area(s) that is not in compliance with the guidelines, to refrain from certain actions, or to initiate certain actions. The warning is in effect until a specific date, at which time the Program’s status will be reconsidered. A warning does not affect the approved status of the Program and is not made public.
- **Probation** – When a Program fails to respond to conditions imposed on it by a warning, or when it deviates significantly from the published guidelines or policies but not to such an extent as to warrant a withdraw approval, the Program may be placed on probation. Probation is in effect until a specific date, at which time the Program’s status will be reconsidered. The approved status of the program continues during the probation period. The probationary status is not made public.
- **Withdrawal of Approval** – Following the warning or probation period, if the Program continues to be out of compliance with the published guidelines for approval, approval may be withdrawn. The Program will be provided a report of all aspects of the program that are not in compliance. The Program will be removed from the Approved Programs listing(s) and Programs must remove all references to AHDI approval. The program has the option to “Appeal” the decision made by the ACCP. See [“Appeal Process” section](#).

The Approved Program will be provided written notification of any decision of the ACCP within 30 days of the decision.

Publication of Approval Status by the Approved Program

There is no formal accreditation process for healthcare documentation programs; however, AHDI Medical Scribe Program Approval is regarded by industry employers as an emerging benchmark for job-ready workforce candidates. The ACCP grants Approval or Re-Approval to programs based on the outcome of the review, or information contained in the Annual Report. Approval is limited to the specific program or programs reviewed and approved by the ACCP. The institution housing the program is not approved; nor is any partial program track or other educational offering associated with the approved Medical Scribe program. In program advertisement, specify the name and certificate title of the Approved Program. Approved Programs may advertise the program’s Approved Program status solely in the manner set forth below and in compliance with all terms and conditions as may be issued by AHDI or ACCP. Failure to comply with these guidelines for publication of Approved Program status by an Approved Program may lead to sanctions outlined above.

The following sets forth rules governing the appropriate and inappropriate use of AHDI’s marks, including the Association for Healthcare Documentation Integrity, AHDI, or AHDI Approved Program, or AHDI Approval. Programs granted Approved Program status by AHDI must comply with these Rules of Use.

AHDI retains all trademark and other ownership rights concerning its marks. AHDI therefore reserves, and may use, the full range of legal remedies and sanctions available under applicable laws and policies to protect the marks. Infringement of any AHDI mark will be challenged. Questions concerning the proper use of the marks should be submitted to AHDI or ACCP in writing.

Each Program accepts and assumes sole responsibility for understanding and satisfying all applicable legal and professional regulations and requirements, including those requirements which may apply to the use, display and/or advertising of a mark. AHDI assumes no responsibility in connection with the application of such legal and professional regulations and requirements.

Permission to use the marks are limited and personal to the Program, and may not be transferred, assigned, or otherwise used by any other individual, organization, business, or entity.

Following receipt of information that an inappropriate or unauthorized use of the AHDI marks may have occurred, AHDI will determine if responsive actions will be taken. Programs are required to cooperate fully in the review and resolution of such matters. AHDI may take any responsive actions or appropriate measures to correct a violation, in AHDI’s sole discretion.

Program Category	Use the following language
Non-Approved	<p>Non-Approved programs should not refer to AHDI Approval until the ACCP grants Approval.</p> <p>Non-Approved programs can refer to healthcare documentation education that is designed to meet the AHDI’s <i>Medical Scribe Model Curriculum for Healthcare Documentation Programs</i>.</p>
Approved	<p>Approved programs may use statements such as:</p> <p>[Name of Certificate Program] is Approved by the Association for Healthcare Documentation Integrity.</p> <p>Statements such as “Fully Approved” are incorrect since the ACCP does not award partial approval. Approved for 3 years or a specific time is also incorrect since Approval is based on an on-going relationship with the ACCP.</p>
Approved, but have other program offerings available to prospective students	<p>Programs or program tracks within the healthcare documentation department of the institution housing an Approved Program must make it clear to all constituents that only the Approved Program has that status.</p>

Publication and Disclosure of the Approval Status by AHDI

AHDI publishes the Approved Program status in the Approved Educational Programs list on the AHDI website. Information regarding the Approved Program status of the program disclosed to the public is limited to Record of Status and Scope. The ACCP informs the AHDI administrative office and the AHDI Board of Directors of the status of all Approved Programs.

AHDI makes no representations, warranties, or guarantees as to, and has and assumes no responsibility for, the proper performance of Approved Programs. Neither AHDI, nor the Approved Program status, guarantees or warrants anything beyond the Program's ability to meet the particular standards and criteria under the Education Program Approval. The Programs must agree not to misrepresent the Approved Program status and its meaning.

Questions and More Information

For more information, including important documents and submission deadlines, please visit the AHDI website at <https://www.ahdionline.org/edapproval>.

Please contact AHDI with questions regarding the Education Approval Program:

AHDI Education Approval Program
3430 Tully Road, Suite 20 #112
Modesto, CA 95350
800-982-2182
edapproval@ahdionline.org

Appendix A: Approval Committee for Certificate Programs (ACCP) Duty of Confidentiality

As a reviewer and voting member of the Approval Committee for Certificate Programs (ACCP), while exposed to healthcare documentation/medical transcription programs for the purpose of Education Program Approval by the Association for Healthcare Documentation Integrity (AHDI), I understand that I have the duty to maintain the confidentiality of:

1. All materials and information submitted by programs seeking approval
2. All findings, determinations, outcomes, and scores associated with the reviews I perform
3. All non-published policies, procedures, and scoring mechanisms associated with the program approval process
4. Any other materials disclosed due to my position as a member of the ACCP that are marked confidential, or that are reasonably understood to be confidential materials

I understand that this duty extends beyond the period of time during which I serve as a reviewer and voter for AHDI's Education Approval Program, i.e., that I will be bound by this duty as a former committee member with regard to confidential information and material that I had access to during the period I was a reviewer and voter.

I understand that the duty of confidentiality prohibits me from purposefully disclosing confidential information and requires me to act with due care in order to avoid the inadvertent disclosure of confidential information.

Confidential information includes but is not limited to program policies and procedures, records, and reviewer assignments as well as the identity of applicants, their manuals, financial information, curriculum and all other proprietary information submitted by them. I understand that I must hold in confidence all information contained in any and all such records.

I agree to take all reasonable steps to ensure that no use by me, or by any third parties, shall be made of any applicant's confidential material. Further, I agree to return to AHDI or destroy all documentation sent to me for the purpose of review and not retain any copies of such documentation.

I agree not to disclose confidential Association, Program Approval applicant, or Program Approval information to people outside the ACCP, AHDI Board of Directors, or AHDI staff, or to other employees and volunteers who do not have a legitimate need to know, without prior approval of the CEO or COO.

I agree to indemnify and hold harmless AHDI, its employees, agents, directors, officers, committee members, successors and assigns from and against all suits, claims, damages, and liabilities, including attorneys' fees, arising out of my breach of any warranties or representations set forth herein.

I understand that any deviation from the code of confidentiality may be grounds for immediate dismissal and possible legal action.

ACCP Member's Name

Date

ACCP Member's Signature (to confirm acceptance of above policies)

Appendix B: ACCP Conflict of Interest Acknowledgement and Disclosure Form

Members of the Approval Committee for Certificate Programs (“ACCP”) have the duty to act at all times in the best interests of the Association for Healthcare Documentation Integrity (“AHDI”), the ACCP, and the Education Approval Program. A conflict of interest is any transaction or relationship that presents or may present a conflict between an individual’s obligations to AHDI as a reviewer and voting member of the ACCP and the individual’s personal, business, or other interests.

When encountering potential conflicts of interest, individuals shall identify and disclose the potential conflict and remove themselves from all discussion and voting on the matter. Specifically, the individuals covered by this policy shall:

- avoid placing (and avoid the appearance of placing) one's own self-interest or any third-party interest above that of AHDI/ACCP; while the receipt of incidental personal or third-party benefit may necessarily flow from certain AHDI/ACCP activities, such benefit must be merely incidental to the primary benefit to AHDI/ACCP in furtherance of its exempt purposes;
- not abuse their ACCP position by improperly using AHDI resources or property for their personal or third-party gain or pleasure, and shall not misrepresent to third parties the extent of their authority to represent and/or act on behalf of AHDI/ACCP; not engage in any outside business, professional or other activities that would directly or indirectly materially adversely affect AHDI/ACCP; not engage in or facilitate any discriminatory or harassing behavior directed toward AHDI staff, members, officers, directors, meeting attendees, exhibitors, advertisers, sponsors, suppliers, contractors, or others in the context of activities relating to AHDI/ACCP; not solicit or accept gifts, gratuities, free trips, honoraria, personal property, or any other item of value from any person or entity as a direct or indirect inducement to provide special treatment to such donor with respect to matters pertaining to AHDI/ACCP without fully disclosing such items to the ACCP Chair.

Although not all conflicts of interest are necessarily prohibited or harmful to the association, AHDI does require full disclosure of all actual and potential conflicts of interest through an annual disclosure process. In addition, when any actual or potential conflict may arise, an affected ACCP member should disclose the existence of such conflict to the ACCP Chair. The ACCP Chair will make a final determination as to whether the ACCP member shall be recused from the pertinent discussion and vote.

On an annual basis, all members of the ACCP shall be provided with a copy of this policy and required to complete and sign an acknowledgement and disclosure form prepared by the AHDI Board of Directors.

An appropriate level of confidentiality shall be accorded to information obtained in the course of review of potential conflicts of interest, and disclosures of such confidential information will be made only to the extent needed to resolve the matter or to properly conduct association business.

I have read the Association for Healthcare Documentation Integrity (“AHDI”) Conflict of Interest Policy set forth above and agree to comply fully with its terms and conditions at all times during my service as a member of the ACCP. If at any time following the submission of this form, I become aware of any actual or potential conflicts of interest, or if the information provided below becomes inaccurate or incomplete, I will promptly notify the ACCP Chair in writing. I understand that compliance with AHDI's Conflict of

Interest Policy is a qualification for participation on the ACCP, and that failure to abide by this Policy may be grounds for removal from the ACCP.

Disclosure of actual or potential conflicts of interest:

Do you receive compensation as a member of AHDI's ACCP?

Yes No

Other than reimbursement of reasonable expenses, have you received or do you expect to receive more than \$10,000 per year from AHDI for services provided as an independent contractor?

Yes No

Have you received or do you expect to receive any material financial benefit from AHDI in addition or apart from the benefits described in the above inquiries?

Yes No

Does any family member receive compensation or material financial benefit from AHDI?

Yes No

Do you have a family relationship or business relationship with any current or former Officer, Director, or key employee of AHDI?

Yes No

If you answered "Yes" to any of the above, please explain:

ACCP Member Printed Name

ACCP Member Signature

Date

Appendix C: Preliminary Program Assessment (PPA) Application/Declaration & Release Form

Date of Submission			
Date			
Program/School Information			
Program/School Name (print or type)			
Address			
City	State	Postal Code	Country
()	()		
Telephone	Fax	Email	
Website			

Program/School Representative			
First Name	MI	Last Name	
Title			
Address			
City	State	Postal Code	Country
()	()		
Work Phone	Fax	Email	

Person Completing PPA			
First Name	MI	Last Name	
Title			
()	()		
Work Phone	Fax	Email	

Note: Payment due at the time of application. The PPA, payment of the \$100 fee, and Declaration and Release must be submitted before application will be reviewed.

Preliminary Program Assessment Fee: \$100

Method of Payment:

Check or money order made payable to “AHDI” (US dollars)

Visa Master Card American Express Discover

Credit Card #

Exp. date

Cardholder name (please print)

Authorized Signature

Note: For your convenience, the PPA/Release forms are available in separate Word documents on our website.

ASSOCIATION FOR HEALTHCARE DOCUMENTATION INTEGRITY
EDUCATION PROGRAM APPROVAL
DECLARATION AND RELEASE

By submitting the AHDI/ACCP Education Program Approval Preliminary Program Assessment (the “PPA”), offered by the Association for Healthcare Documentation Integrity (“AHDI”), the Program applying for Approved Program Status (the “Applicant”) hereby agrees that the Applicant submits this PPA in accordance with and subject to the applicable standards, rules, and policies and procedures of the AHDI and the Approval Committee for Certificate Programs (“ACCP”) promulgated in connection with the Education Approval Program (the “Approval Program”). The Applicant understands that AHDI and ACCP will use reasonable efforts to keep the information in its possession confidential. The Applicant understands that AHDI and ACCP, individually and collectively, reserve the right to verify any or all of the information associated with the PPA and/or the Self-Study Application (collectively, the “Applications”), and that providing false, misleading, inaccurate, or incomplete information or otherwise violating the rules governing the Approval Program may constitute grounds for the rejection of the Applications, withdrawal of approval, or other appropriate disciplinary action.

The Applicant understands that AHDI and ACCP reserve the right to modify or alter, at any time, the standards and any rules, or policies or procedures in connection with the Approval Program. The Applicant understands and agrees that AHDI owns all rights, title, and interest in and to all names, trademarks, logos, applications, and other material related to the Approval Program, and the Applicant agrees that it shall only use intellectual property of AHDI in connection with the Applicant’s participation in the Approval Program and in accordance with AHDI’s policies, and agrees to immediately cease using and return such intellectual property upon expiration, withdrawal, or termination of Approval Status. The Applicant understands and agrees that AHDI makes no claims, warranties, guarantees, or promises regarding the content or performance of any approved program; and Applicant agrees not to misrepresent its Approval Status and its meaning. The Applicant hereby attests to the accuracy and validity of, and assumes full responsibility for, the content of the Applications and all materials and information used by the Applicant in support of the Applications.

In consideration of the Applicant’s application to and participation in the Approval Program, the Applicant hereby releases, discharges, and holds harmless, individually and collectively, AHDI, and its officers, directors, employees, committee members, members, subsidiaries, agents, successors, and assigns, from any and all liabilities that may arise, directly or indirectly, now or in the future, by reason of

or in connection with any decision, action, or omission relating to the Applications, the failure to grant Approval Status, the withdrawal of Approval Status, or the Approval Program standards.

The Applicant hereby authorizes AHDI and/or ACCP to make inquiries to any identified persons or entities listed on the Applications so as to verify information on the Applications and authorizes any persons or entities contacted by AHDI and/or ACCP to respond to these inquiries and provide copies of any relevant and non-confidential information to AHDI and/or ACCP. Applicant further authorizes AHDI and/or ACCP to provide a copy of this Declaration and Release to those entities contacted in connection with the Applications should it be requested.

I have read the Applications, the Education Medical Scribe Program Approval Manual, and associated material and understand and agree to abide and be bound by the terms and conditions contained therein, and by all current and future policies, procedures, rules, and regulations of AHDI.

_____ The Applicant understands, agrees to, and accepts the terms and conditions of this
Please Initial Declaration and Release.

AHDI/ACCP Medical Scribe Education Program Approval
Preliminary Program Assessment

Date: _____
Program/School Name: _____

For ACCP use only

Program Approval Standard	Assessment by Applicant School	AHDI Assessment
1. The curriculum must follow the AHDI Medical Scribe Model Curriculum, that is, all competencies and objectives must be met. Course titles do not need to be identical to those in the MC.		
2. The program must provide a minimum of 10 encounters (20 encounters preferred).		
3. Medical Scribe courses must be taught by a CMT/CHDS/CHDP-S, and the program must have a CMT/CHDS involved in curriculum development.		
4. The program must REQUIRE the use of the AHDI Book of Style & Standards for Clinical Documentation, 4 th Edition.		

<p>5. The school/program must be able to demonstrate financial viability through auditor statement or CPA review/financial report, or proof of financial bond with government Department of Education, and program budget for current year.</p>		
<p>6. The school/program must be accredited or licensed through a governmental body.</p>		
<p>7. The school/program must be able to document employment/ placement or enrollment/ completion statistics.</p>		
<p>8. The program must incorporate course instructors who provide traditional instruction and/or direct feedback to individual students, beyond the information and correction that can be gleaned by the student from textbooks and course materials through self-study. Examples: live or recorded lecture, on-site or virtual classroom discussion, and/or directed feedback during practical portions of an educational program. “Autograding” and “autocompare” without regular instructor intervention will be considered insufficient.</p>		
<p>9. The school must have been in existence for a minimum of 18 months prior to applying for approval.</p> <p>Please provide documentation attached to this application that the school has been in operation a minimum of 18 months. Documents could include copies of dated catalogs, a dated license or proof of accreditation, etc.</p>		

Appendix F: Medical Scribe Program Curriculum Spreadsheet

Note: For your convenience, a downloadable Excel spreadsheet of this Healthcare Documentation Program Curriculum Spreadsheet is available on our website.

Instructions: For each competency listed below, identify the course(s) in which that competency is covered and provide an example of an activity or method of instruction used to teach the competency and an example of how you prove that student learning has taken place. <i>Examples are shown in light blue text; these can be deleted and replaced with your own courses.</i>				
	Competency	Course(s)	Example of Instruction (Activity)	Example of Evaluation (sample test item, rubric, presentation, discussion, etc.)
	E. English			
E1	Students will apply correct English usage and the rules of proper grammar, punctuation, and style; and will use correct spelling and logical sentence structure.		In groups, students find on the Internet lists of adjective suffixes, noun suffixes, adverbs suffixes, and verb suffixes (or rules for forming adjectives, adverbs, nouns, and verbs) that focus on spelling and list examples of the same word used as a noun, adjective, adverb, and verb (when applicable).	Words incorporating the suffixes studied are dictated in context, and students must identify the part of speech based on the suffix.
E2	Students will evaluate the reliability of English and medical grammar and style references, as well as references for research and practice, and will apply information from selected references.			
E3	Students will apply correct medical style as defined by authorities such as AHDI's Book of Style & Standards for Clinical Documentation, 4 th edition and/or the AMA Manual of Style, especially rules that specifically apply to healthcare documentation and editing.			

	M. Medical			
M1	Students will construct and deconstruct medical vocabulary by analyzing its structure, including prefixes, suffixes, combining forms, root words, plurals, nouns, and adjectives.			
M2	Students will distinguish between or among medical homophones (soundalikes), commonly confused medical terms, and synonyms.			
M3	Students will categorize and interpret abbreviations, brief forms, acronyms, eponyms, and foreign words and phrases commonly used in clinical practice.			
M4	Students will use terms and discuss concepts of gross and microscopic human anatomical structure, physiologic functioning, and homeostasis.			
M5	Students will categorize surgical procedures and other interventional diagnostic and treatment modalities by specialty, indications or related diagnoses, technique, and typical findings.			
M6	Students will discriminate among procedures, techniques, and findings in diagnostic and interventional imaging.			

M7	Students will differentiate among common clinical laboratory medicine tests, including diagnostic indications, techniques, normal or physiologic and abnormal findings, and the correct expression of values			
M8	Students will identify, pronounce, spell, define, and apply pharmacological terminology.			
M9	Students will differentiate among common drug classes, forms, dosages, and routes of administration.			
M10	Students will compare and contrast the etiologies and pathologies of diseases and trauma within a specialty or body system.			
M11	Students will identify and define methods of diagnosis and treatment of common diseases and conditions.			
M12	Students will appropriately select and use medical reference materials (i.e., word books, dictionaries, Internet, and electronic resources).			
M13	Students will identify and analyze current trends and advancements in medicine.			

	T. Technology			
T1	Students will demonstrate a general knowledge of and the ability to operate computers and related technologies.			
T2	Students will appraise potential security and privacy risks within their work environment, and how to mitigate those risks with adherence to regulatory protocols.			
T3	Students will apply correct ergonomic habits.			
T4	Students will appropriately use electronic references and other resources for research and practice.			
T5	Students will demonstrate appropriate navigation of the electronic health record environment.			
T6	Student will define common terminology, acronyms, abbreviations, and medical nomenclatures related to the healthcare industry.			
	H. Medicolegal Aspects of Healthcare Record			
H1	Students will explain the purpose of the healthcare record.			
H2	Students will describe the content and format of healthcare documents.			
H3	Students will identify and apply medicolegal concepts and the role of the Scribe in risk management.			

H4	Students will apply the AHDI Code of Ethics.			
H5	Students will understand the overall workflow process related to a patient encounter.			
H6	Students will appropriately use related medicolegal and HIM resources for research and practice.			
H7	Students will understand general documentation concepts related to optimizing reimbursement.			
	P. Healthcare Documentation Practices			
P1	Students will demonstrate the ability to document, proofread and/or correct clinician-generated electronic health records, including using critical thinking skills.			
P2	Students will recognize, evaluate, and call attention to inconsistencies, discrepancies, and inaccuracies.			
P3	Students will apply accuracy standards.			
P4	Students will describe the functions, operations, and dynamics of electronic healthcare documentation work environments.			
P5	Students will practice professionalism in the workplace.			

P6	Students will demonstrate active listening and the ability to extrapolate all pertinent information relating to the encounter.			
P7	Students will appraise, and articulate awareness of, the value of continuing education and professional credentials relevant to electronic healthcare documentation practice.			
P8	Students will appropriately evaluate the reliability of and use all resources for research and practice.			
P9	Students will interpret and explain the content of electronic medical records.			
P10	Students will analyze their errors and devise corrective strategies.			
P11	Students will demonstrate appropriate communication skills.			

Appendix G: Annual Report for Approved Program

Annual report is reviewed the same quarter as the approved-through date for each approved school. Report is due 4 weeks prior to quarterly ACCP meeting and is required in the 1st and 2nd year after approval or re-approval. The 3rd year requires a Self-Study application for re-approval.

Note: For your convenience, the Annual Report form is available in a separate Word document on our website.

Annual Report Form

Required for Continued Approval of a Medical Scribe Education Program

Title of Approved Program: _____ Date: _____

Name of Institution: _____

Address: _____

Name of Program Director/Chair: _____

Credentials of the Program Director: _____

Phone: _____ Email: _____

Verification

The enclosed reviewed information is, to the best of my knowledge, correct and meets the requirements for continued Approval by the Association for Healthcare Documentation Integrity.

AHDI Approve Program Name and Location

Signature Date

Printed Name Title

Submit to: AHDI Education Program Approval
edapproval@ahdionline.org
800-982-2182

The AHDI ACCP thanks you for your time in this process. Please include all requested information and attach additional pages as needed. Please refer to the *Education Medical Scribe Program Approval Manual*, Policies of Approval, for review of [Annual Reports](#).

Annual Report Form continued

Program Self-Analysis

Please answer the following questions regarding any changes in the healthcare documentation program *since approval or the last annual report as well as any changes expected this year*. Please check “yes” or “no.” For any items checked “Yes,” identify and briefly discuss the changes.

Criteria	Yes	No	Comment
1. Organizational Structure and Financial Viability			
a. Have there been any changes in ownership, control, legal status, or financial status of program or institution? If yes, please explain.			
b. Have there been any changes in accreditation, licensure, or sanctions by regional accrediting, state or other governmental agency? If yes, please explain and provide copies of new licenses or certificates.			
c. Have there been any ongoing or completed (in last year) legal, financial, or ethical investigations involving program, faculty, administration, or practicum supervisors? If yes, describe in detail and provide documentation.			
d. Have there been any highly publicized controversies involving program, faculty, or institution? If yes, describe in detail and provide documentation.			
2. Personnel: Faculty and Administration			
a. Have any personnel involved in the program left or have there been any changes in roles or titles since approval or last annual report? If yes, please provide details.			
b. Have any new faculty, development staff, program managers, directors, etc. joined the program since approval or last annual report? If yes, please provide CVs for any new personnel.			
c. List all Medical Scribe course instructors and curriculum developers for verification of CMT/CHDS/CHDP-S status.			Names:
3. Curriculum and Instruction			
a. Has your program made any changes in following the <i>AHDI Medical Scribe Model Curriculum</i> ? If yes, please explain.			
b. Have there been any changes to the required minimum of 10 encounters for medical scribe courses? If yes, please explain.			

c. Have any courses been added or dropped from the curriculum? If yes, please explain.			
d. Have there been any changes in course number and names, changes in textbooks or other materials considered an essential part of the program? If yes, describe changes.			
e. Has the student/instructor ratio changed in healthcare documentation courses? If yes, please provide current ratio.			
f. Has your program changed the way it incorporates the <i>AHDI Book of Style & Standards for Clinical Documentation, 4th edition</i> ? If yes, please explain. Specify the format it is delivered. (Book of Style Workbook does not meet requirement).			
4. Operation of Program			
a. Have there been any certificate title, certificate requirement, or program track changes? If yes, describe changes and provide any new certificates.			
b. Has approved program merged or combined with a non-approved program? If yes, please explain.			
c. Have there been any changes in admission requirements? If yes, please explain.			
d. Have there been any changes in evaluation methods of courses, program faculty, supervisors, and/or students? If yes, please explain.			
e. Have enrollment/completion/placement figures changed for 12-month period preceding date of this report? If yes, please provide updated figures.			

Appendix H: Self-Study Review Rubric

Note: For your convenience, the Self-Study Review Rubric form is available in a separate Word document on our website.

Date of ACCP meeting being reviewed	Stage of Review Check One
	<input type="checkbox"/> 1st review
Program/School Name	<input type="checkbox"/> 2nd review (no charge extension)
	<input type="checkbox"/> 3rd review (1st paid extension)
Check One	<input type="checkbox"/> 4th review (2nd paid extension; new applicants only)
<input type="checkbox"/> New Applicant	
<input type="checkbox"/> Renewal – Approved through	

In order to accurately report on the following criteria, all supporting documentation as outlined in the Education Program Approval Manual under Self-Study Guide, Application and Checklist must be provided in Microsoft Teams for Reviewers' analysis.

Self-Study Criteria	Met	Not Met	ACCP Comments
1. Organizational Structure and Financial Viability			
a. The program/school demonstrates financial viability by providing adequate financial resources to support the program and to provide refunds to students should it become necessary.			
b. The program/school is currently recognized by appropriate governmental entities such as state or other governmental educational licensing boards or regional accrediting agencies.			
Self-Study Criteria	Met	Not Met	ACCP Comments
c. The program/school has an Advisory Committee which is comprised of industry and community leaders - potential employers or workforce development representatives or both and is meeting a minimum of 1 time per year.			
2. Personnel: Faculty and Administration			
a. The program/school provided a job description and a narrative or policies and procedures document that described the selection process for each position and methods of evaluation.			

b. A qualified, full-time program director is overseeing the entire program. A qualified program director holds a Certified Medical Transcriptionist, Certified Healthcare Documentation Specialist, Certified Healthcare Documentation Professional credential or a college or vocational certificate in medical transcription/healthcare documentation/SR editing/Medical Scribe or 5 years' acute care experience in the healthcare documentation profession or a bachelor's degree or higher degree with experience in coordinating and operating an academic program.			
c. At least one member of the content development team is a CMT/CHDS. Expertise in instructional design requires experience or training in the field of education with credentialing as appropriate.			
d. A CMT/CHDS/CHDP-S instructs the Medical Scribe courses . The instructor for the medical scribe courses is qualified to teach and has experience in educational training, supervisor, trainer, or quality analyst or is closely supervised and mentored by an experienced educator.			
e. Instructors for non-medical scribe courses have appropriate credentials, degrees, or education to teach those courses.			
3. Curriculum and Instruction			
a. Program provided a detailed description (narrative) of how course content is selected, how instruction is delivered , how distance learning or web-based modules and instruction are accomplished, and how professional practice experiences are supervised. Program described the curriculum development process for the program.			
Self-Study Criteria	Met	Not Met	ACCP Comments
b. Appendices D and E were completed and reflect the inclusion of the BOSS4CD and 10 encounters. Encounters from noncommercial sources and virtual practicums if applicable was made available for review.			
c. Course syllabi include all elements outlined in Self-Study competencies and objectives from Medical Scribe Model Curriculum.			
d. Program meets each competency in the Medical Scribe Model Curriculum as illustrated in Appendix F.			

e. Course instructors provide formal instruction and direct feedback to students. The program described instructor/student interaction, how student progress is tracked and submitted samples.			
f. The program/school demonstrated that course competencies are covered in the test questions by providing sample graded comprehensive final exams or representative graded tests or other appropriate method of evaluation for each core content area.			
g. The program/school provided student/instructor ratio for all healthcare documentation courses.			
4. Operation of Program			
a. The program/school adheres to nondiscriminatory practices with respect to race, color, creed, sex, age, disabling conditions (handicaps), and national origin for both employees and students.			
b. The program/school awards certificates or diplomas only to students who have met the criteria for successful completion and the document(s) outline the basis or criteria for the award.			
Self-Study Criteria	Met	Not Met	ACCP Comments
c. The program/school maintains records for student enrollment and evaluation that sufficiently document learning progress and achievement.			
d. Program/school has student and instructor grievance policies in place and provided copies.			
e. Program/school has a policy in place for student withdrawal and refunds of tuition or fees.			
f. Program/school has process is in place to track the Enrollment/Completion or Placement data or both.			
g. Announcements, advertisements and promotions accurately reflect current trends in the healthcare documentation profession and the program being offered as well as ACCP approval status if applicable.			

Approval recommendation Check One
<input type="checkbox"/> Approved or Re-approval

Approval Pending Change or Re-approval Pending Change

Denied

Comments:

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If Approval Pending Change or Re-Approval Pending Change:
Check One

Program/School paid extension fee to continue

Date paid:

Program/School voluntarily chose Denied status

Comments:

Appendix I: Definitions

Certified Healthcare Documentation Professional (CHDP) Credential

The Certified Healthcare Documentation Professional (CHDP) exam is based on the AHDI Core Competencies and the [AHDI Model Curriculum](#). It is a voluntary credentialing exam for individuals who wish to become Certified Healthcare Documentation Professionals. The CHDP exam is designed to assess competency in healthcare documentation by determining if a candidate has the core knowledge and skills needed to practice healthcare documentation effectively in an electronic health record system, working with variable specialties and document types, and using critical thinking that requires an advanced level of clinical knowledge and interpretive ability.

Certified Healthcare Documentation Professional - Scribe (CHDP-S)

The Certified Healthcare Documentation Professional–Scribe (CHDP-S) exam is a voluntary credentialing exam for individuals who have earned the Certified Healthcare Documentation Professional (CHDP) credential and wish to earn the Scribe micro-credential. The CHDP-S exam is designed to assess competency in healthcare documentation by determining if a candidate has the core knowledge and skills needed to effectively create documentation when acting as a scribe.

AHDI Book of Style & Standards for Clinical Documentation, 4th Edition

As the professional association for healthcare documentation/medical transcription, AHDI is the recognized leader in acknowledging and establishing healthcare documentation/medical transcription style, forms, and practices. The current edition of the *Book of Style & Standards for Clinical Documentation, 4th Edition*, represents AHDI's most complete guidelines for a wide variety of such topics. These are widely accepted because the Association's reputation for quality and exactness has established it as the recognized authority in the industry. Use of the *Book of Style & Standards for Clinical Documentation, 4th Edition*, is a requirement for programs seeking AHDI approval. The *AHDI Book of Style Workbook* is not a substitute for this requirement.

[The Book of Style & Standards for Clinical Documentation, 4th Edition](#), as well as the [eSource for Healthcare Documentation Instructors](#) may be obtained from:

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