

Preparation For Chart Review

- Create one organizer box for each chart category specified. Clearly mark the category.
- Select records for each category based on communication from the ACS (how many, how recent)
- Dealing with records that are included in multiple categories:
 - Full chart should appear in only one organizer box. An empty placeholder folder should be placed in any other categories that the chart would fall under. The front of the chart should state: “Chart is in categories XXX, YYY, ZZZ. Full chart found under category YYY.”
 - Deaths take precedence. All deaths should be placed in the appropriate organizer box. There should be no placeholder charts in this category.
- Folder organization:
 - Front of chart should clearly show patient age, sex, mechanism of injury, and ISS.
 - Front of chart should indicate if significant PI activity occurred
 - Optional: you may flag charts with a colored sticker or other indicator if you want the reviewers to look at it because you believe it highlights the PI process. Explain the flag system to the reviewers. They may choose to focus on some of these charts.
 - Inside chart, print the following sections of the EMR (or copy paper chart sections):
 - Discharge summary
 - EMS run sheet
 - Trauma flow sheet (make sure surgeon arrival times are findable)
 - H&P
 - Key consultant notes during initial care (typically ortho and neurosurgery)
 - Operative notes within first 48 hours
 - Flag each of the above sections with a colored tab. Create an index of the tab colors to provide to the reviewers.
 - Assemble all PI information on the patient in a sub-folder to be included in the chart folder. Copies of pertinent sections of meeting minutes and any forms used by TPM/TMD for review should also be included.
- TMD and TPM should review every death and be familiar with PI findings
- TMD and TPM should review all charts with significant PI activity and be familiar with it
- For EMR, have one workstation for each reviewer
- Assign one “EMR expert” to each workstation to help their reviewer. This should not be the TPM or TMD.
- Test anything that is not paper to make sure it works flawlessly (computers, WiFi, etc). Test again the morning of the review.
- Provide a light lunch and/or snacks, depending on the time the reviewers arrive
- Enjoy!