
STRATEGIES AND TACTICS FOR EXIT INTERVIEWS AND REPORT WRITING

MICHIGAN SITE REVIEWER WEBINAR #2

FRIDAY, JULY 13, 2018

KEY POINTS TO CONDUCTING A SUCCESSFUL SITE VISIT

- Prepare for the visit – review and communicate PRQ questions / concerns to facility and Verification/Designation Coordinator prior to visit, as needed
- Manage time for the day to allow all required tasks to be completed
 - Chart review process may be time consuming – get to charts early
- State of Michigan Criteria must also be used to guide the designation process

SITE REVIEW WRAP-UP: CLOSED SESSION

- Use time to prepare verbal report
 - 60 minutes
- Resources
 - Michigan Criteria
 - ACS Orange Book (Criteria Quick Reference Guide)
 - State trauma website – www.michigan.gov/traumasystem
 - Regional Trauma Coordinator in attendance at site visit
 - Tammy First, State Verification/Designation Coordinator

SITE REVIEW WRAP-UP: CLOSED SESSION

- If unsure whether a finding is a deficiency, list as an area of opportunity.
 - Communicate at the exit interview a that finding reported as area of opportunity may be elevated to deficiency
- Bring in TMD and TPM at the end of the closed session to go over findings to be certain nothing was overlooked
 - Policies – all required were reviewed and appropriate to the facility's level
 - Binders – all required documents were reviewed and appropriate
 - Review of charts – did the program support and demonstrate a solid PI process, reveal opportunities or critical deficiencies?

EXIT INTERVIEW

- Typical start time – 3:00 p.m.
 - Time management ensures a successful visit
 - Pre-work and organization prior to the site visit will assist in allowing adequate time for chart review
- Use scripted statement provided by MDHHS and report on the following components:
 - Deficiencies
 - Strengths
 - Areas of Opportunity
 - Recommendations
- Site visit report should mirror what is stated at exit interview

DESIGNATION OUTCOMES

- Ensure facility understands what cited deficiencies mean
 - No criteria deficiencies = three year verification/designation determination
 - Three or fewer **type II** criteria deficiencies = one year verification/designation determination with focused review (on-site or documentation submission)
 - Type I or four or more type II criteria deficiencies = denied designation/verification
- Emphasize the final decision regarding verification and subsequent designation will be made by MDHHS (with input from Designation Subcommittee) and may differ from reviewer findings.

EXIT INTERVIEW CONVERSATION

- Reviewers identified no critical deficiencies
 - Three year designation
- Reviewers identified up to three type II critical deficiencies
 - One year designation with focused review (on-site or documentation submission)
- Reviewers identified one or more type I critical deficiencies
 - Non-designation
- Reviewers identified four or more type II critical deficiencies
 - Non-designation

REPORT WRITING – INTRODUCTORY COMMENTS

- Brief, general overview of the facility and the trauma program
- Provides context for the Designation Subcommittee members and MDHHS
- If applicable, note revisions to the PRQ

REPORT FORM – BEST PRACTICE



Michigan Statewide Trauma System Site Review Report

Use this template to complete the final site review report. Type the information into each section. See *Sample Final Report* for detailed instructions on how to complete the template. The electronic version of this document, along with the *Sample Final Report* can be found online at www.michigan.gov/traumasystem.

Hospital:

Date of Site Visit:

Designation Level:

Date of Report:

Reviewers:

Introductory Comments

Trauma Program Overview

Health & Human Services

Case Summaries

Trauma Deaths

(Please format each Trauma Death case summary as follows):

Date of Service:

Admission Service (if applicable):

Level of Activation:

Injury Severity Score (if available):

ICU Patient: Yes No

Case Summary:

PI Findings (clinical, system or process):

Reviewer Comments

Trauma Transfers

(Please format each Trauma Transfer case summary as follows):

Date of Service:

Admission Service (if applicable):

Level of Activation:

Injury Severity Score (if available):

ICU Patient: Yes No

Case Summary:

REPORT WRITING TIPS

- Stay objective – state facts
- Ensure the facility's policies/processes meet criteria vs. different than the way things are done at reviewer facility
 - Can give recommendations to strengthen, be specific
- Committee structures may look different.
 - Example: Peer review meeting may be attached to a hospital peer meeting but there is evidence that they “gavel in and out” for trauma and have representation of the appropriate committee members (typically seen in the Level IV facilities)
- Avoid comments regarding hiring more employees or purchasing new equipment
- Type out deficiency and citation (do not paraphrase)

REPORT WRITING – TRAUMA PROGRAM COMMENTS

- Deficiencies
 - Must be cited (i.e. CD 5-15, Type II) and accurate
 - Sufficient data to support: maybe referenced in the PI plan, chart review or need for guideline or policy
- Strengths
 - Components (commitment, readiness, resources, policies, performance improvement) of trauma program that are functioning properly and provide a strong foundation.
- Area of Opportunities
 - Appropriate and actionable
 - See evidence of the process but there is a need for the facility to develop further
- Recommendations
 - Objective and give clear direction to initiate change
 - Each recommendation must match an area of opportunity

REPORT WRITING – CASE SUMMARIES

- De-identified summaries of reviewed charts
- Support cited deficiencies and areas of opportunity
- PI Findings:
 - Summarize all aspects of the facility's PI activities (i.e. levels of review, issues identified, strategies for remediation and loop closure)
- Reviewer Comments:
 - Reviewer comments regarding effectiveness of PI activities

CLOSING COMMENTS

- Total number of deficiencies
- Additional comments not previously covered in report
- Both reviewers must sign the site visit report indicating support of content
 - Electronic signatures or email confirmation

SITE REPORT REVIEW PROCESS

- 1) Site visit report submitted by Lead Author (copy co-reviewer).
- 2) Two members of the Designation Subcommittee are assigned as editors to perform a detailed review of the report and give their findings to the full Designation Subcommittee at the next scheduled meeting.
- 3) The Designation Subcommittee makes a recommendation on the verification/designation determination
- 4) The Michigan Department of Health and Human Services makes the final verification/designation determination.

QUESTIONS



WRAP UP

- The recording of the June 22nd reviewer webinar on preparation and chart review, as well as this webinar will be available at www.michigan.gov/traumasystem under the “Site Reviewer Resources” tab. An email will be sent to notify all when the recordings are available.
- A brief survey will be sent regarding both reviewer webinars. Please respond with your feedback.
- Reminder: attending or viewing recorded webinar(s) is required to maintain active site reviewer status.

ACKNOWLEDGEMENTS

- Wayne VanderKolk, MD FACS
 - Trauma Medical Director, Mercy Health St. Mary's
 - State Trauma Advisory Committee member
 - Designation Subcommittee Chair
- Amy Koestner, RN, MSN
 - Trauma Program Manager, Spectrum Health Butterworth
 - Michigan Site Reviewer
- Chris McEachin, MBA, BSN, RN
 - Trauma Program Manager, Henry Ford Macomb Hospital – Clinton Township
 - Designation Subcommittee member