

Virtual Visit Frequently Asked Questions

Videoconferencing platform

- What videoconferencing platform is available to host the virtual visit and is it HIPAA compliant?
 - The State of Michigan will provide HIPAA-compliant Zoom® access.
- Do we need additional HIPAA or privacy agreements for virtual site visits?
 - No additional agreements are necessary for virtual site visits. The State of Michigan site reviewers have signed an agreement requiring them to act in accordance with HIPAA regulations.

Navigator (Only required for Level III visits)

- What is the navigator and what role do they serve?
 - The navigators, one for each reviewer, will guide the review team through the virtual medical records, PI documentation, and supporting documentation. This role can be fulfilled by the TPM/TPC, trauma registrar, PI coordinator, or any other staff that are familiar with navigating through the trauma EMR. *Level IV facilities may want to have someone from medical records readily available for any EMR related needs.*

Pre-review call

- What is the pre-review call?
 - The pre-review call is required to ensure all technical, logistical issues, and/or questions are addressed prior to the virtual visit.
- Who should schedule the pre-review call?
 - The TPM/TPC or contact designated by the hospital will schedule the pre-review call.
- Who is required to attend the pre-review call?
 - Attendees will include the TMD, TPM/TPC, reviewers, and Regional Trauma Coordinator.
- When should the pre-review call take place?
 - As a critical step in the virtual site visit process, this call should take place approximately 30 days prior to the visit.
 - Programs are encouraged to schedule this call (1 hour) as soon as possible as reviewers' schedules are limited.

Chart Review Selection (CRS) Template

- What is the chart review selection process?
 1. Trauma programs will be required to provide a deidentified list of trauma patients that will include the most recent medical records within the reporting year based on the required five categories. A Chart Review

Selection (CRS) Template will be provided in advance for the facility to complete.

2. The reviewers will select the required medical records from the list provided by the facility.
 3. The trauma program will then provide those medical records to the reviewers 14 days prior to the visit.
- When does the CRS template need to be uploaded into the file transfer application?
 - 45 days prior to the virtual visit.
 - When will the reviewers return the CRS template so we can prepare the medical records for review?
 - The lead reviewer will upload the CRS template to the file transfer application with their selections highlighted within 10 days of receipt of the CRS template.
 - When will the trauma program need to provide an electronic copy of the medical records to the review team?
 - Medical records must be provided to the review team no later than 14 days prior to the virtual visit.
 - How are copies of the electronic medical records sent to the reviewers?
 - The medical records and program documents must be sent to the reviewers via the file transfer application provided by the State of Michigan.

Medical Records and Assessment Documents

- How should the medical records be prepared?
 - The hospital should not print paper copies of medical records. Each medical record selected by the reviewers, must have all pertinent documentation (refer to *Medical Record Review Guidance* document) along with the copy of the guidelines/protocols (ortho/neuro protocols, MTP, etc.) appended to the medical record that were followed to care for the trauma patient.
- How will medical records be reviewed during the site visit?
 - Level III Visits: The reviewers will be in separate virtual Zoom breakout rooms with their assigned navigators. The TMD and TPM/TPC must be on hand to assist the reviewers.
 - Level IV Visits: The reviewers, TMD, and TPM/TPC will be in separate physical rooms on the same Zoom call. The reviewers will take turns reviewing their medical records with the TMD and TPM/TPC.
- How are copies of the appended/additional documents sent to the reviewers?
 - The virtual visit documents can be sent via the file transfer application provided by the State of Michigan.

- For a focused review, what medical records and documents should be prepared?
 - All of the above bullets in this section are applicable to a focused review with the exception of the medical record timeframe. The timeframe will be based on when the trauma program implemented the corrective actions to address the criterion deficiency(ies). The assessment documents that must be prepared would be those that are associated with the deficiency(ies) under review.

Review Meeting (not applicable to a focused review)

- If there is no review lunch, how will reviewers meet with our liaisons?
 - In lieu of the review lunch, a meeting will be held with the required liaisons and staff (refer to *Virtual Visit Agenda*).
- What is the set-up for this meeting?
 - We do not recommend having all attendees in one large conference room (refer to *Tips for Successful Visit* document).
 - All attendees must have individual logins through Zoom during this meeting so their attendance can be acknowledged, and the reviewers know who is available to speak to programmatic questions.

Hospital Tour (not applicable to a focused review)

- What is the best method to do the tour virtually?
 - The tour is done live during the virtual visit.
 - The trauma program can use a tablet/phone/laptop.
 - The tablet/phone/laptop can be put on a cart with wheels or have individual tablets strategically located at each area that will be toured.
 - The tour will be conducted for all reviewers at the same time.
 - Refer to *Tips for Successful Visit* document for more suggestions for a virtual site visit tour.

Observers

- What is the purpose of the observers?
 - Occasionally, state staff and/or reviewers will observe virtual visits. Observing virtual visits is used to train reviewers and document best practices.

Visits scheduled from 2020 (Site visit dates and review team confirmed)

- Our visit was previously confirmed (scheduled dates with review team) and later postponed, can we keep the same PRQ reporting period?
 - Yes, you can keep the same reporting period based on the previously confirmed site visit date OR your program can use a 12-month reporting period consistent with the new scheduled site visit date.
 - If a new reporting year is chosen, a new PRQ will need to be completed and submitted.

- Medical records for review will be based on the PRQ submission option in the first bullet of this section. Hospitals must advise the State Trauma Designation Coordinator which option they are choosing when the scheduling begins.
- Current medical records may be included if the program implemented improvements during the postponement period.

Hospitals whose designation expires in 2021

- My hospital's designation expires in 2021, what reporting period should I use when my re-designation site visit is scheduled?
 - If your hospital's designation expires in 2021, your program has the option to keep the same 12-month reporting period from the original expiration date OR your program can use a 12-month reporting period consistent with the scheduled site visit date.
 - Medical records for review will be based on the PRQ submission option. Hospitals must advise the State Trauma Designation Coordinator which option they are choosing when the scheduling begins.
 - Current medical records may be included if the program implemented improvements during the postponement period.

Impact of COVID-19 on Standards

- What if standard(s) are impacted by COVID-19 at my trauma center?
 - The State of Michigan understands the impact this pandemic has had on hospitals' resources and the ability to maintain compliance with standards. At the State's discretion, leniency regarding standards may be issued on a case-by-case basis. These allowances are subject to approval by the State of Michigan and the Designation Subcommittee. Standards that may have been impacted must be documented and signed by the TMD. This must be presented to the review team at the time of the site visit.