

Pre-Review Virtual Visit Checklist

Prior to your virtual visit, please complete the following items:

- Ensure the videoconferencing platform (Zoom) is accessible by your hospital.
- Request access to file transfer application. See *Virtual Visit Facility Guidelines* for instructions. Refer to the virtual visit confirmation email for the specific folder you will request on the file transfer application. *If you are trying to access the file transfer application from your hospital's network and are having issues, you may need to contact your hospital's IT department for assistance with the firewall.*
- The TPM/TPC is required to have Adobe Standard DC or Adobe Pro to accurately prepare the charts for uploading into the file transfer application.
- Upload the PRQ to the file transfer application at least 45 days prior to the scheduled review date. The PRQ and attachments should be in one single pdf.
- The TPM/TPC or contact designated by the hospital will work with the State for the logistical aspects of the virtual visit.
 - The hospital will be responsible for the logistical aspects of the virtual visit, such as scheduling the appropriate participants for each component of the review day, providing technical assistance as needed and ensuring all required participants are on the videoconferencing line for the various parts of the agenda. The hospital will be responsible for sending email communications and calendar invitations for each section of the virtual review as noted in the *Virtual Visit Agenda*.
 - Hospitals are strongly encouraged to have staff on hand to assist with medical record retrieval or IT issues that may arise.
- For Level III visits, assign one navigator per reviewer to assist in chart review.
 - The navigators, one for each reviewer, will guide the review team through the virtual medical records, PI documentation, and supporting documentation. The navigator should be someone that is familiar with the trauma patients, EMR, and supporting PI documentation, for each reviewer to assist with chart review.
- Complete *Chart Review Selection (CRS) Template* and upload to the file transfer application for chart selection at least 45 days prior to virtual visit.
- Provide medical records, PI documentation, and all supporting documentation at to the reviewers 14 days prior to the virtual visit via the file transfer application.
- Provide required program documentation to the reviewers 14 days prior to the virtual visit via the file transfer application. Refer to the *Virtual Visit Documentation Requirements* for details on required documentation.
- Provide a list of attendees for the review meeting and their roles to the reviewers and State Trauma Designation Coordinator prior to the virtual visit.
- Schedule a pre-review call with the reviewers and Regional Trauma Coordinator approximately 30 days prior to the virtual visit.

- Rehearse the tour to ensure everything will run smoothly the day of the review. Items to be tested include the video, microphone, and speakers of the phone/tablet/laptop being used to broadcast the tour. Ensure that those conducting the tour can be seen and heard on the virtual tour and that they can hear those on the other end of the line asking them questions.
- Video for the live tour should be provided by a tablet/phone/laptop signed into the video conferencing platform.
 - The tablet/phone/laptop can be put on a cart with wheels or have individual tablets strategically located at each of the areas that will be toured.
 - The tablet/phone should always be held horizontally (landscape mode) for best viewing.
 - A small Bluetooth speaker/microphone should be paired to the tablet/phone and used as microphone for all interviewees. It should be handed to each person interviewed.

Due Date Checklist

- Virtual Visit Date:
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- PRQ and Designation Application Due Date (45 days prior):
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- Chart Review Selection (CRS) Template Due Date (45 days prior):
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- Chosen medical records and program documentation Due Date (14 days prior):
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