MDHHS
Michigan Department of Health & Human Services

Pre-Review Virtual Focused Visit Checklist

Prior to your virtual focused visit, we ask that you complete the following items:

☐ Ensure the videoconferencing platform (Zoom) is accessible by your hospital.

☐ Request access to the file transfer application. See *Virtual Focused Visit Facility Guidelines* for instructions. Refer to the focused 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.

☐ The TPM/TPC or contact designated by the hospital will work with the State for the logistical aspects of the virtual focused review.
   o The hospital will be responsible for the logistical aspects of the virtual focused 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 also be responsible for sending email communications and calendar invitations for each section of the virtual review as noted in the *Virtual Focused Visit Review Agenda*.
   o Hospitals are strongly encouraged to have staff on hand to assist with medical record retrieval or IT issues that may arise.

☐ For Level III virtual focused visits, assign one navigator per reviewer to assist in chart review.
   o 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 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 focused visit.

☐ Provide medical records, PI documentation, and all supporting documentation at to the reviewers 14 days prior to the focused visit via the file transfer application.

☐ Upload program documentation that is relevant to the correction of the identified deficiency(ies) to the file transfer application 14 days prior to the scheduled focused visit date.

☐ Upload the PowerPoint presentation detailing the corrective actions taken 14 days prior to the scheduled focused visit date.

☐ Schedule a pre-review call with the reviewers and Regional Trauma Coordinator approximately 30 days prior to the virtual focused visit.

Due Date Checklist

- ☐ Virtual Focused Review Date:
  - ○
- ☐ Chart Review Selection (CRS) Template Due Date (45 days prior):
  - ○
- ☐ Chosen medical records and program documentation Due Date (14 days prior):
  - ○
- ☐ PowerPoint presentation (14 days prior):
  - ○