

Medical Record Review Guidance

Chart Review Selection Process

The facility will complete and upload the *Chart Review Selection (CRS) Template* to the file transfer application at least 45 days prior to the scheduled review date. The *CRS Template* will include the most recent medical records within the reporting year in the following categories:

- Trauma deaths (10 each)
- Trauma transfers (10 each)
- Trauma team activations (10 each)
- Trauma patients admitted by non-surgeons (10 each)
- Admissions with high ISS (greater than 16) (10 each)

Not all categories will have the required number of charts available during the reporting period. In this instance, pull the medical records that are available. Do not place the same chart in two different categories, select the category most appropriate. The TPM/TPC will only be required to prepare the charts that were selected by the reviewers. Prior to the site visit day, site reviewers may ask for additional charts within a category if they feel there is a need for more information.

Medical Record Review Access

The State of Michigan will provide a HIPAA compliant, password protected file transfer application for the medical records to be uploaded and accessed by the reviewers. In addition, the State will provide a HIPAA compliant videoconferencing platform (Zoom) for the site visit day.

Medical Record Review Preparation

Each medical record selected by the reviewers must have the completed *Chart Summary Form* as the first page of the medical record and be uploaded to the file transfer application. In addition, all pertinent documentation must be appended to the medical record as noted below. The medical records and appended documents are required to be uploaded to the file transfer application 14 days prior to the virtual visit.

Medical Record Required Documentation

Each medical record selected by the lead reviewer must be in Adobe pdf format and bookmarked by the sections below using the bookmark function in Adobe:

- Completed Chart Summary Form
- EMS Run Sheet (if applicable)
- ED Nursing Notes/Trauma Flowsheet
- ED Note—Emergency Physician
- Admit H&P/ED Consult

- Specialty Consult Notes
- OR:
 - Operative Note
 - Anesthesia Flowsheet
- Discharge Summary
- Autopsy Report (if applicable)
- PI documentation regarding case
- Pertinent protocols related to case (if applicable)

*Site reviewers may request navigator to access radiology imaging.

Medical Record File Naming

Each medical record must be labeled as follows:

- Reviewer name, chart category, chart number (ex. Jones Death 1)
- Example of file names for uploaded medical records:
 - Jones Transfer 1
 - Jones Transfer 2
 - Smith Transfer 1
 - Smith Transfer 2