## PREREVIEW CHECKLIST

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

☐ Ensure the videoconferencing Software is HIPAA compliant (for medical record review).

☐ Submit PRQ or focused review corrective action plan 45 days prior to the visit date.
   o For Level I trauma centers, submit research articles using the Research Form Template to cotvrc@facs.org prior to the virtual visit.

☐ Assign an onsite logistics coordinator.
   o The onsite logistics coordinator will be responsible for the logistics aspects of the virtual visit, such as scheduling the videoconferencing meetings, sending out calendar invitations, providing EMR access, and, most importantly, ensuring all required participants are on the videoconferencing line for the various parts of the agenda. This role cannot be fulfilled by the TPM.

☐ Send one calendar invite with breakout sessions (if permissible) for the required participants as noted in the Virtual Visit Review Agenda. This will alleviate confusion regarding who should attend which section of the agenda. Please copy the VRC office on all calendar invitations at COTVRC@facs.org.

☐ Assign one staff navigator per reviewer to help remotely navigate the EMR/EHR.
   o The staff navigators, one for each reviewer, will guide the review team through the virtual medical records, PIPS documentation, and supporting documentation. This role cannot be fulfilled by any of the following: the TPM, TMD, trauma program's onsite logistics coordinator. The staff must be someone from the trauma team who is familiar with navigating through the trauma EMR and who can address clinical questions related to patient care and/or protocols.

☐ Complete PCR Template (Appendix 3) and submit to the lead reviewer (cc cotvrc@facs.org inbox) for chart selection at least 30 days prior to virtual visit. **This may be sent earlier if your schedule allows it.**

☐ Follow up with the lead reviewer after 7 days if the PCR template was not returned and copy the cotvrc@facs.org

☐ Provide reviewers the medical records with medical record face sheet, TQIP report, and all assessment documentation (refer to Appendices 1 and 2) at the time of the visit AND provide to the review team **NO LATER than 14 days** prior to the virtual visit via an electronic HIPAA compliant transfer or sharing file system (Ex: secured email, Box, Sharepoint, Sharefile, or any system approved by your compliance/IT department). We strongly encourage trauma centers to provide the medical records and assessment documents prior to the prereview call to ensure the files are accessible.

☐ Schedule the prereview call with the reviewers, the TMD, TPM, navigators, trauma program's onsite logistics coordinator. The prereview call may be scheduled earlier if schedules permit but no later than **14 days prior** to the date of the virtual visit. Please copy the VRC office on all calendar invitations at COTVRC@facs.org.

☐ Discuss and establish the functionality of the live tour during the prereview call.
   o Trauma centers must 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.

☐ Provide a list of attendees for the review meeting and their roles to the review team prior to the virtual visit.

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THE COMMITTEE ON TRAUMA

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