Metro Health
Lessons Learned
ACS Virtual Visit
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First Impression Ma[...]

YOU NEVER GET A SECOND CHANCE TO MAKE A FIRST IMPRESSION

Virtual Visit First Impression

- PRQ
- Charts (25) and required documents
- Pre-Review virtual meeting with reviewers (1 week before the visit)

Start Early

- Print and follow directions exactly.

- Check the ACS site frequently for updates.

- Create and publish a project calendar with key milestone dates.

- Send a 'Save the Date' calendar note to everyone who will be invited to the virtual participation.

- Spreadsheet preparation, patient selection and file preparation and sharing will TAKE MUCH LONGER than you might think.

- Talk to or visit someone who has had a virtual visit.

Box.com

One Note

All documents in '.pdf' format

In Epic, a chart can be saved in pdf format, no 'printing and scanning' is needed.

Organize in sections and categories exactly as they show. Make it easy for them to find what they need.

This takes a LONG TIME!! Plan accordingly.

April.hills@umhwest.org is a great resource.

| Patient Summary | Prehospital | Trauma Flowsheet and Timeline | ED | History and Physical | Consults | Progress Notes | Operative Reports- 1st 48hrs | Anesthesia and OR Reports | Imaging | Blood Bank |

N/A

- New Section 1
- New Section 2
- Abd_Thoracic Injuries
- Adverse Events
- Deaths
- Hospice
- MTP
- Neurosurgical Injuries
- Non-Surgical Admissions and T...
- Orthopaedic Injuries
- Abd_Thoracic Injuries

- Patient Summary
- Prehospital
- Trauma Flowsheet a...
- ED
- History and Physical
- Consults
- Progress Notes
- Operative Reports- ...
- Anesthesia and OR ...
- Imaging
- Blood Bank
- Discharge Summary
- Autopsy
- Guidelines_Protocols
- PIPS

- Patient Summary
- Prehospital
- Trauma Flowsheet a...
- ED
- History and Physical
- Consults
- Progress Notes

The organization of patient chart documents in One Note

Recruit an **IT SPECIALIST** ASAP and explain scope and timeframe. Be sure they understand that PHI info will be shared and the scope of files (hundreds).

Identify and orient a **VISIT COORDINATOR** who is organized and skilled with on-line meetings and can devote the time needed for organizing logistics. This person works closely with and meets regularly with the TPM but is NOT the TPM.

PRQ Section Meetings

Pre-Review Coaching

Copy **section of submitted PRQ** and distribute it to the liaison and clinical leader responsible for that section

TMD and TPM hold a **brief meeting** with them to review the ACS visit schedule and the PRQ info. Discuss potential questions reviewers may ask in their specialty.

Visit the clinical leader and liaison in their space for each area that will be toured and identify what will be shown and potential questions.

Virtual Review Meeting – instead of dinner.

- Send each participant a 'quick reference' for do's and don'ts for successful virtual meetings.

Practice, Practice, Practice

- About a month before, hold **10-15 min practice 'web meetings'** to test sound, background, image, & name visibility (name,title). See what the reviewers will see. Everyone should join from where they will be during visit.

- Send 'key points instructions' to everyone who is invited.

- Use **private spaces with camera on**.

- **Practice the tour** and create a small audience to provide feedback (background noise, what can they see and hear, transition time, stability of picture, audio quality). We practiced 3 different times. Be sure there are not areas where the video or audio doesn't work.

- We used an I-pad on a stand, a speaker/microphone combo, and carried a backup with us.

Know Your Cases and PI Documents Thoroughly

- Start thinking of your review at the beginning of your data year…Dot your I's and cross your T's.

- Be sure you have loop closure on issues.

- Identify charts that might be selected for your review so that you don't spend time searching for them. Know the categories.

- They will choose 25 charts from the spreadsheets you submit. Choose cases carefully and wisely for each spreadsheet.

- **Know these cases thoroughly!**

- We printed copies of key documents and made them available for TMD, TPM, and PI RN during the review for quick reference when questions were asked. Each had a notebook in the review room.

Maximize the Pre-Review Meeting with the Reviewers

Trauma supplies are organized, color-coded, and labeled to follow ATLS assessment.

- **Do a brief PPT presentation**
  - Brief hospital overview
  - Show pictures of key areas that will be toured, that you want to highlight, but may be hard to see during the tour due to patients in rooms. For us, it was the trauma bay and color coding and organization of supplies according to ATLS assessment.
  - Intro of trauma team (ones on this call)
  - Overview of how the documents are organized and how to access them. (Share your screen and show them.)
  - Ask reviewers about their preferences
  - Ask them to access a chart within 24 hours and let you know that it was successful. (Can not use a MAC)