



NORTHAMPTON COUNTY

Department of EMERGENCY MEDICAL SERVICES



STANDARD OPERATING GUIDELINES

TOPIC: Chart Review Responsibilities	SOG #: 2.19.1
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Status: ACTIVE	Written: 03/08/2010
Written by: Hollye B. Carpenter	Revised: 01/01/2013
Approved by: Hollye B. Carpenter	Adopted: 01/01/2013

PURPOSE

To establish guidelines for review of Charts, specifying specific checks of all necessary areas and providing more consistency with questions asked of the providers

SCOPE

All department EMS personnel

CONTENT

QA – Shift Supervisor (S2)

Dispatch Page

1. Ensure all initial entry charts are locked
2. Verify, by review of weekly 911 report, all calls have been entered
3. Enter “V” volunteer charts as necessary
4. Verify the following information on page 1 (dispatch information) of all charts:
 - a. Incident # - entered and correct
 - b. Basesite – entered and correct
 - c. Unit # - entered and correct
 - d. Unit Type – “ALS” – entered and correct
 - e. Shift – entered and correct
 - f. Response – “Emergency” – entered and correct
 - g. EMD - entered
 - h. Type of Service – “Scene” & “Unscheduled”, unless “V” chart
 - i. Dispatched as – entered and correct
 - j. Mass Casualty – typically “no” – entered and correct
 - k. Vehicle Grid – entered and correct
 - l. Crew – entered (notify EMS Director of volunteers to add to drop-down crew list as necessary)
 - m. Referring Type – entered and correct
 - n. Referring Location/Zip/County - entered and correct
 - o. Scene Grid – entered and correct
 - p. Mode – entered -
 - q. Receiving Type/Name/Unit – entered and correct
 - r. Receiving MD & RN – entered as appropriate
 - s. Mode – entered - Lights & Sirens use appropriate for call
 - t. Destination Basis – entered
 - u. Destination Grid – typically “16” – entered
 - v. Mileage – ensure appropriate with use of GEO coding
 - w. Times – Ensure complete and correct verified by 911 reports



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Patient Information

1. Verify the following information on the patient information page with hospital face sheet:
 - a. Last/First/Middle
 - b. SSN
 - c. Address/City/State/Zip/County
 - d. Sex
 - e. Phone Number
 - f. Citizen of – typically “United States”
 - g. DOB
 - h. Age
 - i. Race
 - j. DL State/DL Number
 - k. Employer Information – if available
 - l. Physician Information – if available
 - m. Enter Relationship/Guarantors Information 0 if available
 - n. Enter Billing Information – if available
2. File original charts (incident number order) by month, in designated location to include the following:
 - a. ALS charts
 - b. Activity Audit/Medications Used (as required)
 - c. Refusal Forms (as required)
3. Prepare (incident number order) other hard copy information for distribution to the appropriate station
 - a. Hospital Face Sheet
 - b. HIPAA/Billing Forms

Clinical Review

1. (Dispatch Page) Pt Category - correct/appropriate
2. (Dispatch Page) Outcome – correct/appropriate
3. (Patient Information) Current PMHS – completed
4. (Patient Information) Current Medications – completed
5. (Patient Information) Current Allergies – completed
6. Review of clinical information documented on page 3:
 - a. Impression/Chief Complaint/Secondary Complaint/History
 - b. Reason for Encounter & Drugs/Alcohol
 - c. Injury Details/Cardiac Arrest/Motor Vehicle as necessary
 - d. Scene Description
 - e. Patient Belongings
 - f. Patient Movement
 - g. Factors Affecting Care
7. Review of clinical information documented on page 4, 5, 6 & 7:



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- a. Neuro
 - b. Initial GCS
 - c. Airway
 - d. Respiratory
 - e. Cardiovascular
 - f. Secondary Survey
 - g. Med/IVs Prior to Arrival
8. Review of Activity Log to include:
- a. Vital Signs and GCS - documented and adequate for severity of patient, including documentation of glucose, rhythm, pain level, and stroke scale if necessary
 - b. Meds - appropriate, including dosage and route
 - c. Treatment - documented and appropriate
 - d. Protocol - appropriately followed and documented
 - e. Hospital Contact - documented as appropriate
 - f. Patient turnover and condition documented as appropriate
 - g. Completion of patient refusal form documented as appropriate

All corrections will be documented in a chart addendum.

QA – Special (S3)

To be used at a later date.

QA – EMS Captain (S4)

1. Overall review of chart for statistical, billing, quality assurance and advancement.
2. Provide quarterly “It’s the Numbers” report.

All corrections will be documented in a chart addendum by the AIC.

QA – Special (S5)

To be used at a later date.

QA – Volunteer Billing Ready (S6)

All charts for the volunteer agencies shall be at a minimum of this level upon printing the billing packet.

Billing Packets

1. Delivery typically will occur on Thursday of each week
2. Review report, specific to station, to determine if all charts during specified date range are at the appropriate QA level (S6)
3. Assemble chart packets for station delivery to include the following:
 - a. Hospital Face Sheet
 - b. HIPAA/Billing Form
 - c. EMS Chart



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QA - Attachments (S7)

1. All charts for Ambulance 31-1 related to transports, air ambulance transports and treat and release shall remain at this level until all appropriate documents are scanned and uploaded.
2. Review/scan/attach original paperwork including:
 - a. AIC signature – electronically signed
 - b. Physician signature as required for ALS charts
 - c. Activity Audit/Medications Used – completed as required
 - d. HIPAA/Billing Form – complete and correct
 - e. Patient refusal documentation as required – complete
 - f. Facesheet

QA – Cornerstone Ready (S8)

1. A chart summary is created upon advancement to this level and charts are automatically uploaded to Cornerstone.
2. Charts for Ambulance 31-1, related to transports or treat and release, shall remain at this level until verified received by Cornerstone.

QA – Cornerstone Pending (S9)

1. Charts for Ambulance 31-1, related to transports or treat and release, shall remain here until receipt of full payment is verified and/or proper write offs have been carried out.

QA – Stats Ready (S10)

1. Prepare monthly statistical data information for distribution.
2. Advance and submit charts to OEMS/Image Trend.