

## 2001 Medical Record Review Summary Sheet

The following items are required (IM.7.10-IM.7.10.1) to be included as part of the organization's ongoing review of medical records. The review must address the **completeness and timeliness of information** of the items listed. While the review is expected to be ongoing in nature, at least quarterly findings for the review process should be available and activities to address improvement evident. The 19 items can be reviewed each quarter or on an annual basis. If they are reviewed each quarter, quarterly findings need to be reported. If the 19 items are reviewed on an annual basis, then the data from the previous two years need to be reported to assure a performance improvement approach to ongoing record review. This form will be used by the surveyors to orient them to the scope of the medical record review activities of your organization for the twelve months prior to survey. The completed form should be attached to the medical record review material supplied for the Document Review Session (the document review session is a survey activity designed to prepare and orient the surveyors for subsequent survey activities). Such material should include reports or minutes for the twelve months prior to survey of the group responsible for the review of medical records.

Were the following items included in the review of medical records during the twelve months prior to survey?	Findings (Numerator/Denominator)				Performance improvement initiative to address findings if appropriate.
	Q 1/D1	Q 2/D2	Q 3/D3	Q 4/D4	
Identification data					
Medical history, including - chief complaint - details of present illness - relevant past, social & family histories - inventory by body system					
Summary of the patient's psychosocial needs as appropriate to the patient's age					
Report of relevant physical examinations					
Were the following items included in the review of medical records during the twelve months prior to survey?	Findings (Numerator/Denominator)				Performance improvement initiative to address findings if appropriate.
	Q 1/D1	Q 2/D2	Q 3/D3	Q 4/D4	
Statement on the conclusions or impressions drawn from the admission history and physical examination					
Statement on the course of action planned for this episode of care and its periodic review, as appropriate					
Diagnostic and therapeutic orders					
Evidence of appropriate informed consent					
Clinical observations, including the results of therapy					
Progress notes made by the medical staff and other authorized staff					
Were the following items included in the review of medical records during the twelve months prior to survey?	Findings (Numerator/Denominator)				Performance improvement initiative to address findings if appropriate.
	Q 1/D1	Q 2/D2	Q 3/D3	Q 4/D4	
Consultation reports if applicable					
Reports of operative and other invasive procedures, tests, and their results if appropriate					

Source: Joint Commission on Accreditation of Healthcare Organizations, Oakbrook Terrace, IL.