**CHECKLIST WORKSHEET 1**



**Principles of Quality**

* Verifiability
* Definability
* Consistency
* Integrity

**⃝ Verifiability**

Notes: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

⃝ **Definability**

Notes:

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**⃝ Consistency**

Notes:

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**⃝ Integrity**

Notes:

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**CHECKLIST WORKSHEET 2**



**Quality Assurance Guidelines**

* Accurate and complete records
* Timely and accessible distribution
* Statistically valid sampling
* Auditing applied to all documents
* Consistent, unbiased review
* Error values consistent with definitions
* Consistent communication
* Availability of account specifications

⃝ **Accurate and complete records**

Notes:

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⃝ **Timely and accessible distribution**

Notes:

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⃝ **Statistically valid sampling**

Notes

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**⃝ Auditing applied to all documents**

Notes:

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⃝ **Consistent, unbiased review**

Notes:

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**⃝ Error values consistent with definitions**

Notes:

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**⃝ Consistent communication**

Notes:

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**⃝ Availability of account specifics**

Notes:

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**CHECKLIST WORKSHEET 3**



**Comprehensive Quality Assurance Program**

* Proactive
* Educational
* Realistic, scalable, financially feasible
* Simple and easy implementation
* Secure, confidential
* Inclusive of all aspects of author-to-text
* Reportable
* Timely

**⃝ Proactive**

Notes:

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⃝  **Educational**

Notes:

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**⃝ Realistic, scalable, financially feasible**

Notes:

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**⃝ Simple and easy implementation**

Notes:

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**⃝ Secure, confidential**

Notes:

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**⃝ Inclusive of all aspects of author-to-text**

Notes:

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**⃝ Reportable**

Notes:

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**⃝ Timely**

Notes:

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**CHECKLIST WORKSHEET 4**



**Factors Affecting Quality**

* Author
* HDS, Scribe experience
* Equipment
* Patient Demographics
* Account Specifications
* Resources

**⃝ Author**

Notes:

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⃝  **HDS, Scribe experience**

Notes:

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**⃝ Equipment**

Notes:

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**⃝ Patient demographics**

Notes:

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**⃝ Account specifications**

Notes:

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**⃝ Resources**

Notes:

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**CHECKLIST WORKSHEET 5**



**Blanks**

* Causes for blanks
* Resolution of blanks
* Roles and responsibilities

⃝  **Causes for blanks**

* **Audio file distortion**

Notes:

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* **Clipped, cut off, incomplete, or omitted dictation**

Notes:

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* **Suboptimal dictation practices**

Notes:

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* **Discrepancy in dictated details**

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* **Author-requested blanks**

Notes:

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* **Inability to verify terminology**

Notes:

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* **Unknown person or place**

Notes:

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* **Preexisting blank within text copied forward**

Notes:

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**⃝ Resolution of blanks**

Notes:

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**⃝ Roles and responsibilities**

* **Clinician/Author**

Notes:

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* **Facility Staff**

Notes:

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* **Healthcare Documentation Specialist**

Notes:

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* **MTSO**

Notes:

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* **Authenticator**

Notes:

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**CHECKLIST WORKSHEET 6**



**Evaluating Your Environment**

* Setting
* Technology
* Clinician/Authors
* Hospital/MTSO supported setting

**⃝ Setting**

Notes:

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⃝  **Technology**

Notes:

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**⃝ Authors**

Notes:

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**⃝ Hospital/MTSO supported**

Notes:

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**CHECKLIST WORKSHEET 7**



**Structure of Your Current QA Program**

Consider the following elements as they pertain to your current program:

* Style standards
* Error categories
* Scoring
* Regular review
* Feedback
* Error-triggered review
* Counseling and corrective action
* Education
* Compensation
* Transparency

**⃝ Style Standards**

Notes/Barriers:

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**⃝ Error categories**

Notes/Barriers:

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**⃝ Scoring**

Notes/Barriers:

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**⃝ Regular review**

Notes/Barriers:

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**⃝ Feedback**

Notes/Barriers:

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**⃝ Error-triggered review**

Notes/Barriers:

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**⃝ Counseling and corrective action**

Notes/Barriers:

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**⃝ Education**

Notes/Barriers:

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**⃝ Compensation**

Notes/Barriers:

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**⃝ Transparency**

Notes/Barriers:

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**CHECKLIST WORKSHEET 8**



**QA Staffing**

* Available resources to maintain current program?
* Will changes trigger staffing changes?
* What will be the effect on costs/line?
* If more staffing required, consider impact to budget and how to justify this increase?

**⃝ Available resources**

Notes:

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**⃝ Staffing changes**

Notes:

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**⃝ Effect on costs/unit measure**

Notes:

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**⃝ If more staffing required, consider impact to budget and how to justify this increase?**

Notes:

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**CHECKLIST WORKSHEET 9**



**Workforce**

* Healthcare Documentation Specialist, Level 1 - 3
* Quality Assurance Specialist
* Quality Manager
* Document Integrity Auditor
* Support Staff

**⃝ Healthcare Documentation Specialist, Level 1- 3**

Notes:

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**⃝ Quality Assurance Specialist**

Notes:

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**⃝ Quality Manager**

Notes:

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**⃝ Document Integrity Auditor**

Notes:

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**⃝ Support Staff**

Notes:

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**CHECKLIST WORKSHEET 10**



**Assessment Policies and Procedures**

* Concurrent review
* Retrospective review
* Flagged documents
* Feedback
* HDS Assessment
* Author assessment
* Transparency

**⃝ Concurrent review**

Notes:

**⃝ Retrospective review**

Notes:

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**⃝ Flagged documents**

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**⃝ Feedback**

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**⃝ HDS Assessment**

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**⃝ Author assessment**

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**⃝ Transparency**

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**CHECKLIST WORKSHEET 11**



**Strategies for Continuous Quality Improvement**

* Address technical errors
  + Evaluate for optimal clarity of recording devices, formats, and settings
  + Eliminate background nose
  + Replace sound cards, headsets, batteries
  + Evaluate/update transcription/editing platforms
* Address errors attributable to authors
  + Develop training opportunities
  + Distribute dictation cards
  + Establish work types and templates
  + Establish open lines of communication
  + Develop feedback forms to provide information to authors
  + Develop policies & procedures
* Address HDS errors
  + Provide consistent and verified feedback including references
  + Underscore with face-to-face or telephone conversations, with HDS feedback
  + Distribute samples
  + Provide templates and normals
  + Assign mentors
  + Develop policies & procedures
  + Compile account specification sheets
  + Review and revise account specification sheets regularly
  + Maintain up-to-date physician and allied health lists.
* Set quality assessment intervals and adjust as necessary

**⃝ Address technical errors**

* + Evaluate for optimal clarity of recording devices, formats, and settings

Notes:

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* + Eliminate background nose

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* + Replace sound cards, headsets, batteries

Notes:

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* + Evaluate/update transcription/editing platforms

Notes:

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**⃝ Address errors attributable to authors**

* + Develop training opportunities

Notes:

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* + Distribute dictation cards

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* + Establish work types and templates

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* + Establish open lines of communication

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* + Develop feedback forms to provide information to authors

Notes:

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* + Develop policies & procedures

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**⃝ Address HDS errors**

* + Provide consistent and verified feedback including references

Notes:

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* + Underscore with face-to-face or telephone conversations, with HDS feedback

Notes:

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* + Distribute samples

Notes:

* + Provide templates and normals

Notes:

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* + Assign mentors

Notes:

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* + Develop disciplinary procedures

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* + Compile account specification sheets

Notes:

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* + Review and revise account specification sheets regularly

Notes:

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* + Maintain up-to-date physician and allied health lists.

Notes:

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**⃝ Set up quality assessment intervals and adjust as necessary**

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**CHECKLIST WORKSHEET 12**



**Best Practices Recommendations**

* Apply principles of quality throughout the organization.
* Assess all factors affecting the outcome of the documentation process.
* Establish an adequate budget for QA including workforce, resources, technology, and education.
* Establish and distribute QA policies and procedures.
* Establish and maintain databases of facility-specific information.
* Establish workflow procedures that allow for adequate QA processes.
* Establish education-based feedback for HDSs and authors.
* Train QA staff in computation, consistency, objectivity; encourage critical thinking, continuing education and mentoring.
* Follow guidelines for appropriate QA intervals.
* Provide ongoing staff development.

**⃝ Apply principles**

Notes:

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**⃝ Assess all factors**

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**⃝ Establish an adequate budget**

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**⃝ Establish, distribute policies and procedures**

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**⃝ Establish, maintain facility-specific databases**

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**⃝ Establish workflow procedures that allow for QA**

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**⃝ Establish education-based feedback**

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**⃝ Train, encourage QA staff**

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**⃝ Follow guidelines for QA intervals**

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**⃝ Provide ongoing staff development**

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