POLICY | PURPOSE STATEMENT: It is the policy of the TTUHSC SON Larry Combest Community Health & Wellness Center (LCCHWC) clinics to ensure that a formal program for medical record reviews is in place and implemented.

SCOPE: This policy applies to all providers of the TTUHSC SON Larry Combest Community Health & Wellness Center (LCCHWC) clinics.

PROCEDURE:
1. The Delegating/Supervising Physician and APRN shall agree upon the number of charts to be reviewed and the frequency of meetings. This decision will be based on the Texas Administrative Code Title 22 Part 11 Chapter 222 and Rule 222.5

2. The following process will be followed regarding chart review:
   a. Director of Performance Improvement or Clinic Director will pull agreed upon number of charts for each provider. These charts should be collected 15-30 days after the visit to ensure proper documentation and closing of chart
   b. For each provider the Chart Review Form (Attachment A) will be completed with the following:
      - Date charts pulled
      - Time frame of charts pulled from
      - Number of charts
      - Provider name
      - Patient name, MRN, DOB, and DOS
   c. Once form is completed, each individual patient visit note is forwarded to Delegating/Supervising Physician via EHR.
   d. Depending on agreement with APRN and Delegating/Supervising Physician a meeting will/may occur. This meeting can be face to face or electronically (I.E. Zoom, Webcast, ETC).
Policy and Procedure

e. The Delegating/Supervising Physician completes Chart Review Form, signs tool, and return to either Director of Performance Improvement or Clinic Director.
f. When form is returned, the APRN will sign Chart Review Form indicating chart review has been completed and they agree with data on page.

3. The Clinic Directors will send Chart Review Form to the Director of Performance Improvement.
4. The Director of Performance Improvement will tally pages for each clinic and present data at monthly Performance Improvement Committee Meeting.
5. Once data is collected, the Director of Performance Improvement will store provider pages in a binder in a secure location or may store electronically on secure server.

RESPONSIBILITIES | REVIEW | REVISIONS:
It is the responsibility of the Policy & Procedures Committee to review and initiate necessary revisions based on collaboration and input by Policy and Procedure committee and through Administrative management of this policy, including the review and revisions will be the responsibility of the department administrator

RIGHT TO CHANGE POLICY:
TTUHSC SON Combest reserves the right to interpret, change, modify, amend, or rescind this policy in whole or in part at any time to reflect changes in policy and/or law.

Attachment A: Delegating Physician Medical Record Review