

# Baseline Chart Review Process



## Clinics with Electronic Medical Records (EMRs)

Make sure clinic has a terminal and EMR log-in for you on chart review day(s).

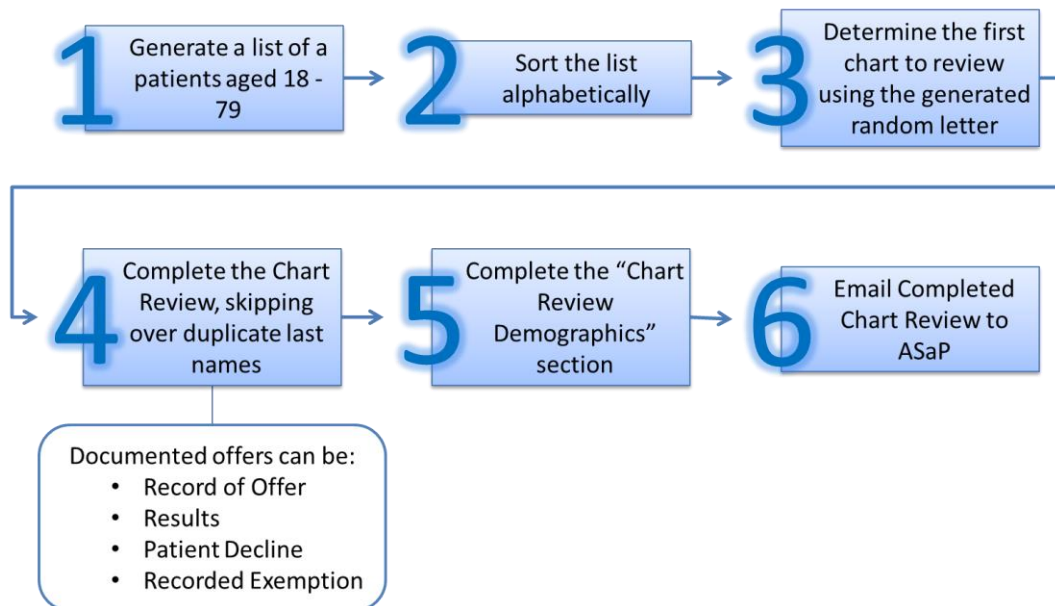
### Checklist of items to bring:

- A laptop (preferred) or printout of the *ASaP Paper Chart Review Instructions and Form*
- Affiliate agreement, Oath of Confidentiality, if necessary
- The provider's up-to-date Superform loaded in MS Office Excel
- # of charts you are reviewing
- List of maneuvers that have been selected
- A random letter from [www.randomlettergenerator.com](http://www.randomlettergenerator.com)

### Preparation

1. Sign Oath of Confidentiality and / or Affiliate Agreement, if necessary
2. Ask for a walkthrough of the EMR and where screens may be found
3. Complete the Setup Tab with the sample size and the selected maneuvers; this may be completed ahead of time

### Chart Review Steps



# Follow-Up Chart Review Process



## Clinics with Electronic Medical Records (EMRs)

### Outreach Method Only or Both Methods

Make sure clinic has a terminal and EMR log-in for you on chart review day(s).

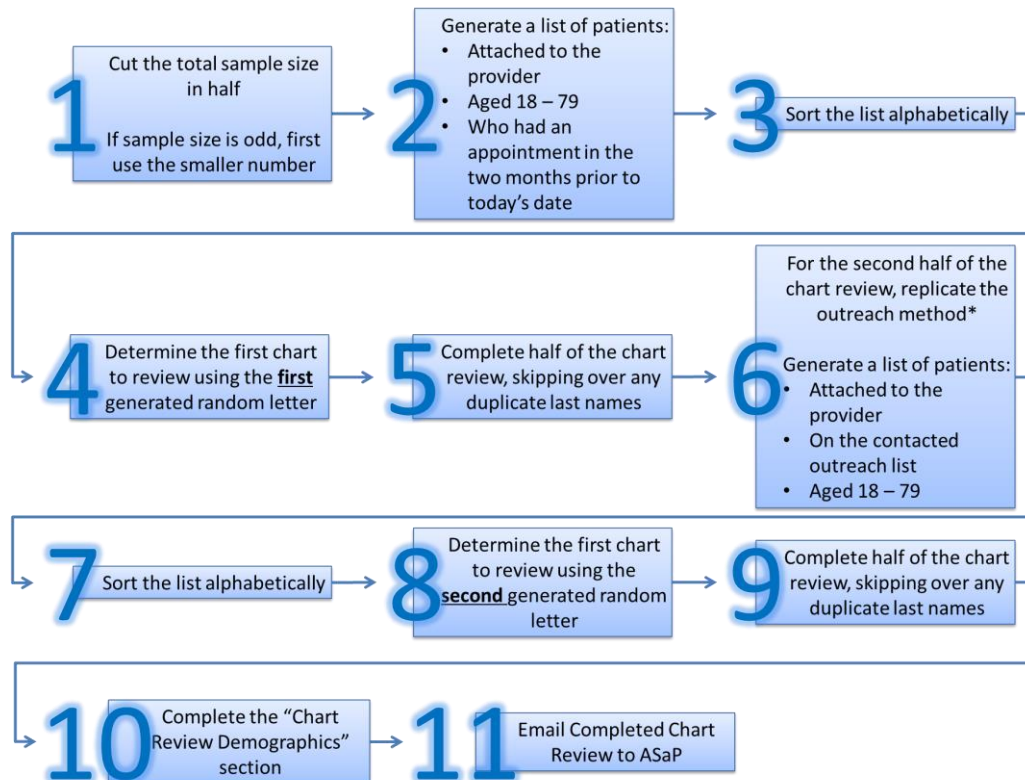
#### Checklist of items to bring:

- A laptop (preferred) or printout of the *ASaP Paper Chart Review Instructions and Form*
- The provider's up-to-date Superform loaded in MS Office Excel
- TWO** random letters from [www.randomlettergenerator.com](http://www.randomlettergenerator.com)

#### Preparation

1. Ask for a walkthrough of the EMR and where screens may be found
2. Be familiar with the method used to reach out to patients

#### Chart Review Steps



\*Refer to the complete *Chart Review Instructions* for examples of outreach methods.

## Opportunistic Method Only

Make sure clinic has a terminal and EMR log-in for you on chart review day(s).

### Checklist of items to bring:

- A laptop (preferred) or printout of the *ASaP Paper Chart Review Instructions and Form*
- The provider's up-to-date Superform loaded in MS Office Excel
- TWO** random letters from [www.randomlettergenerator.com](http://www.randomlettergenerator.com)

### Preparation

1. Ask for a walkthrough of the EMR and where screens may be found

### Chart Review Steps

