Instructions to Peer to Peer Chart Auditing

Instructions:

● **Step 1** - Field Clinician logon to HCHB
  ✓ Field clinicians will use a Surveyor Logon & Password.
    
    a) A new Surveyor User Login has been created for every office.
    b) This login is to be used for CHAP and State Surveyors as well as for Field Staff coming in to the office to perform Chart Audit functions.
    c) The logon naming convention is as follows: SURVEY<OFFICE Abbreviation> e.g. SURVEYNOR (This would be the Norwalk office logon)
    d) Passwords are initially set to hchb2011 and you will be prompted to change the password upon initial login.
    e) Please remember to securely save your office password for future use for surveyors and chart auditors.

● **Step 2** – Determine which clients to audit.
  ✓ Randomly pull client names from the Surveyor Report found in HCHB
  
  Orb>Report Manager>Survey/CHAP Reports>Surveyor Report>Filter by time period> Episode Status>View/Print

  ✓ Can be used to find open/closed records, Discharged or Recert cases, by Discipline type or by Diagnosis (eg. Wounds/Heart failure/COPD) for a designated period of time.

● **Step 3** – Use the Peer to Peer Audit Tool on each chart

● **Step 4** – When a negative trend is identified, use the DMAIC methodology to develop your Performance Improvement Plan. The WWW (Who does What by When) worksheet is an additional tool for the process.

How many Charts should I audit (Unplanned Transfers and additional charts that represent missed disciplines?)

✓ The rule of thumb is to audit 10% of your unduplicated admissions. Please audit no less than 10 charts per quarter (if your census is very low). The maximum required is 30 charts per quarter (if your office census is very high).