The Briefing for the Audit

The audit team is to meet internally to discuss the recommended talking points listed below. Note that some of these are best done with live examples, making the briefing less a pre-audit talk, and more a 'rolling' one.

1. The type of audit: HAS vs Sentinel vs. Health Department
2. Total number of medical records to be audited
3. Total number of medical records currently available
4. The EW or day under review. Clarify the date(s).
5. Tasks to be accomplished
6. Delineation of tasks
7. Docket review
    a. Diseases or events being audited for
    b. How to look beyond the presenting complaint (PC) or assessment/diagnosis
    c. Keeping count of the medical records
    d. Suggest they make note of any recurrent issues identified
    e. Presence and use of surveillance stamps
8. Interviews
    a. Areas for interviews and staff category
    b. Prompting the interviewee for answers (e.g. nearby class one posters)
    c. Making sure the audit staff know the answers to the audit tools
    d. Suggest they make note of any recurrent issues identified
9. Identify any early issues that may change the audit plan