

**AUDITS – MONITOR OPERATING ROOM TIMES, MINUTES, CASE TYPE, REGISTRATION TYPE  
 AND COMPLETION OF THE OR CHART (VERIFICATION)**

<b>Suggested Audit Checks</b>			
<b>Audit Frequency</b>	<b>Report/Process</b>	<b>Uses</b>	<b>Correcting Issues</b>
*Daily or Weekly plus Month End	AHS Custom Reports <a href="#">ORM Statistics - Adhoc</a>	View missing fields, time discrepancies including the order, blank charts, accounts in SCH or PRE status, case type to confirm no missing emergency or planned cases	Review the case and identify the corrections needed. Missing or incorrect information, duplicate/cancelled case that needs to be removed from ORM.
Daily or Weekly plus Month End	<a href="#">ORM Billing Maintenance Desktop</a> (Use unverified side button)	Look for unverified charts on a regular basis to keep on top of potential missing documentation fields	View the Holding, Operative and Phase I section to confirm times entered as expected then verify the chart. If chart incomplete follow your sites charting correction process.
Month End	AHS Custom Reports <a href="#">ORM Audit Registration</a>	Identify accounts that are not used on completed OR cases Any SCH/PRE status or any ER, RCR, REF, CLI (some rural sites use CLI visits in the OR)	Non OR type account– switch account process SCH account – confirm if case cancelled, duplicate chart or if it needs to be charted
Optional	AHS Custom Reports <a href="#">Booked vs Actual</a>	To compare elective scheduled and actual start and finish times	Not used for finding errors but rather as a tool to monitor case start/finish times
Optional	Reports/Forms Reports 1 <a href="#">List Delayed Cases</a>	Lists case detail and the delay codes associated	Not used for finding errors but rather as a tool to monitor delays

**ORM Statistics - Adhoc Report (in AHS Custom Reports)**

- Suggest daily checks on the previous day's cases (minimum weekly) plus a month end review
- **Run the report for specific date range and room group. View the report as not necessary to print it.**
- View the previously completed cases for the following:
  - ✓ Missing time fields (universal report and not all sites use all time fields listed)
  - ✓ Missing or incorrect surgeon or anesthesiologist
  - ✓ OR and PACU total minutes missing or obviously incorrect (negative minutes, minutes in the 1000s or extremely low minutes such as 0 or 5 mins for PACU time)
  - ✓ Number of planned and emergent cases are accurate each day
  - ✓ Account Type (No accounts in SCH or PRE status and no ER, REF, RCR or CLI visits (exception are rural sites that have clinical visits in the OR e.g. Endoscopy))

### Billing Maintenance Desktop (also works on the Nurse Desktop)

- Suggest daily checks on the previous days cases (minimum weekly) plus a month end check
- **Billing Maintenance Desktop - Search by date range, location (only if you have access to multiple sites) and click the side button to limit results to UNVERIFIED cases**

**OR**

- **Nurse Desktop – Clear your worklist then compile a new list and pick status of UNVERIFIED**
- Before attempting to verify these older cases you should double check they appear complete
  - ✓ In Holding and Out PACU times documented if appropriate to your site/case
  - ✓ Operative Times entered
  - ✓ If yes, attempt to verify the chart
  - ✓ If no or missing fields upon verification, follow your sites practice for chart correction.
- **Important:** If the chart is blank or visit in SCH status (thus no ability to document) this requires further confirmation to determine if this is a:
  - ✓ Missed documentation in ORM (may require an account switch if in SCH status)
  - ✓ Duplicate chart (cancel via Cancel by Patient process)
  - ✓ Cancelled case but OR chart remained (cancel via Cancel by Patient process)

### ORM Registration Audit (in AHS Custom Reports)

- Month end check
- **Run the report for specific date range and room group. View the report as not necessary to print it.**
- The report is preset to display cases with registration status that should not be used for surgical visits
- Exception is clinical visits (CLI). Some rural ORs do have CLI visits so they may not be errors
- PRE registration of any registration type
  - ✓ Requires an account switch
- SCH registration of any type
  - ✓ Indicates chart was not documented thus could be a duplicate, cancelled or missed case.
  - ✓ Investigate further to ensure you know the steps needed to correct this
- Incorrect registration type such as ER, REF, RCR or CLI (status of PRE, REG or DIS does not matter)
  - ✓ No OR cases should be linked to these types of registration categories (exception for sites that have CLI cases in their OR)
  - ✓ Follow the switch account process.

### Optional Booked vs Actual (AHS Custom Reports) and/or List Delayed Cases (Report/Forms – Reports 1)

- Some sites use these reports daily and they are good resources to view when issues arise or to assess the efficiency of the OR cases
- **Run the report for specific date range and room group. Only print if required otherwise view the report.**