Last 10 Patient Chart Audit Template

Practice:
Date of audit:
PF/Coach:
Participating:
Care gap of focus:

Use to capture data & calculate missed opportunity (MO) rate. Change column headings as needed.

Gap closure approach/process being audited: (Check one below)

- ☐ *Opportunistic (at-visit) care gap closure*
- ☐ *Between-visit outreach*
- ☐ *Gap-specific campaigns*
- ☐ *Outreach to patients not recently seen or who have not yet established care*
- ☐ *Administrative closure*

Patient ID	Date of_____ (event/ visit)	Gap already closed (Y/N)	Gap closed at:(Event) (Y/N)	Method	Factors contributing to missed opportunity (or successful closure)
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

MO rate: (Total Ys in columns 2+3/10)_____

Analysis of Last 10 Audit
Process Improvement Brainstorming Table

- ☐ *Opportunistic (at-visit) care gap closure*
- ☐ *Between-visit outreach*
- ☐ *Gap-specific campaigns*
- ☐ *Outreach to patients not recently seen or who have not yet established care*
- ☐ *Administrative closure*

Factors contributing to MOs from audit above* & other sources	**Ideas for process improvement***	**Next step & who is responsible**
1.		
2.		
3.		
4.		
5.		
6.		
7.		

*Pending root cause analysis. *Pro-Tip: Transfer this information to a project management tool like Monday or Asana to start a formal improvement plan and track action items or use a basic excel spreadsheet. Drop brainstorm list into ChatGPT or similar AI content creation tool to create a very rough first draft of a QI plan for care gap.*