



## Pre-Summarization Medical Record Checklist

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### Purpose

A comprehensive checklist ensures that medical records are fully prepared and organized before the summarization process begins. This improves accuracy, reduces omissions, and streamlines the review process.

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### Pre-Summarization Checklist

#### 1. Record Collection Verification

- All relevant medical records obtained.
- Records from all involved facilities and providers included.
- Any missing documentation requested and acquired.

#### 2. Record Categorization

- Inpatient, outpatient, emergency, surgical, diagnostics categorized.
- Separate chronological files created per encounter type.

#### 3. Duplicate Elimination

- Identical records identified and removed.
- Consistency of information verified across multiple copies.

#### 4. Document Legibility

- Illegible scanned records flagged.
- Missing pages or sections identified.

#### 5. Privacy Compliance

- Redaction of personally identifiable information if required.
- HIPAA-compliant handling of all data.

#### 6. Special Notes for Reviewers

- Flag complex or contradictory information.
  - Mark critical incidents or high-risk events.
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## Reviewer Preparation

- Ensure medical reviewers are briefed on case objectives.
  - Provide summary templates and client-specific requirements.
  - Clarify timelines for review completion.
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## Ashirolam's Commitment

- Organized, clean, and complete data foundation for every summary.
  - Efficient hand-off from data collection to medical summarization.
  - High accuracy rates through rigorous pre-summarization protocols.
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## Contact Us:

For more information or to request a customized checklist for your organization:

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