

Reality Check Tracer & Process Handoff Log

This template provides a structured approach for conducting a "Reality Check" Tracer when your review log indicates a quality issue is either still being monitored or has dropped out of sight. It helps you validate data, identify broken monitoring loops, and confirm process sustainability.

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Validating Data vs. Frontline Practice

Date of Tracer/Interview	Review Log Reference ID	Issue/Metric Being Checked	Owner/Unit

Part A: For Items Still Being Monitored (Data Validation)

Use this section when your Quality Committee Review Log indicates the metric is active and reporting status (i.e., you are confirming the reported compliance rate is real).

Tracer Question: Does the Data Match the Reality?

- Metric Being Validated:** e.g., Post-Fall Huddle Compliance Rate (95%)
- Target Observation Sample:** e.g., Observe 5 shifts/huddles, or audit 10 recent charts.
- Observation / Audit Finding:**
 - + e.g., Observed 3 huddles. 1 was completed within 15 min, 2 were delayed over 45 min.
 - + e.g., Found 8/10 charts had a documented, individualized safety intervention.
- Conclusion on Data Validity:**
 - DATA VALID: Frontline practice largely confirms reported numbers.
 - DATA INVALID: Significant gap found (e.g., reported 95% compliance, but practice is closer to 60%). Why the Discrepancy? (e.g., Staff log the huddle time, but don't record the full team attendance, inflating the true compliance.)

Action Required (If Data Invalid):

- Retrain Data Entry/Process: Fix the metric calculation or staff documentation process.
- Retrain Frontline Practice: Address the practice gap (e.g., conduct 1:1 coaching on huddle timing).

Part B: For Items No Longer Monitored (Investigative Search)

Use this section when a historical high-risk issue has not appeared in your minutes for the last 12+ months (i.e., you are confirming the issue was formally closed, not forgotten).

Investigation Question: Where Did the Monitoring Go?

1. Issue (Old RFI) No Longer Tracked: e.g., Verbal Order Read-Back Compliance (PC.02.01.11)

2. Search Findings (Check Minutes/Log):

- FOUND:** A formal Graduation Report or Closure Report was located in minutes from:
(Date/Committee:)
- NOT FOUND:** No formal closure. Issue appears to have been dropped.

3. Process Handoff Interview: Interview the former owner or manager.

+ Interviewee: (Name/Role)

+ Process Handoff Determined: Where did the metric move? (e.g., Was the metric moved to the Pharmacy Manager's monthly audit? Was it integrated into the mandatory annual competency check?)

Conclusion on Monitoring Loop:

- PROCESS SUSTAINED:** The issue was formally closed, and the process/metric was successfully absorbed into a standard, routine audit (e.g., Annual Competency or Departmental Audit).
- PROCESS BROKEN:** The issue was neither formally closed nor transitioned. The monitoring loop has failed, and the issue is at High Risk for Recurrence.

Action Required (If Process Broken):

- Re-activate Metric:** Immediately add the metric back to the Quality Committee Review Log as a new, high-priority item.
- Create New Audit:** Assign a new owner to build a simple, sustainable audit process for the historical RFI.

