

How To Create A Bookmarked PDF File Collection For Site Visits



Software

- Adobe Products (premium) – full featured PDF creator/editor
 - Adobe Acrobat Pro
 - Adobe Acrobat DC
- Other premium products – full featured PDF creator/editor
 - Kofax PowerPDF
- Free products – only merge existing PDF files into a bookmarked pdf
 - PDFMerge
- And others surely exist...



What A Bookmarked PDF Looks Like

Sample chart for chart review

Bookmark list

01 Face Sheet
> 02 PIPS Materials
03 Prehospital
> 06 ED Physician Note
04 Trauma Flowsheet
> 07 Trauma H&P (2)
> 08 Consultation Notes
> 10 Imaging Reports
> 09 Operative Notes and Anesthesia Records
12 Discharge Summary

VRC VERIFICATION REVIEW CONSULTATION
for excellence in trauma centers

A QUALITY PROGRAM of the AMERICAN COLLEGE OF SURGEONS


ACS Medical Record Face Sheet
(To be completed on every chart selected)

Patient	Name xxx	Age xx	Gender Male
MRN/Trauma registry #	xxx		
Injury Category	MVC		
ISS	27		
EMS Scene Time	34 minutes		
Trauma Team Activation	Yes <input checked="" type="radio"/>	No <input type="radio"/>	Level Single Tier
Patient arrival date/time to trauma bay/ED	Date 00/00/00	Time 1631	Surgeon arr time 1629
Time of initial imaging	Chest xray 1636	Pelvic xray 1636	CT 1658
MTP activated	Yes <input type="radio"/>	No <input checked="" type="radio"/>	Time
Consultant services engaged in ED	Orthopedics, Vascular Surgery		
Response time for services with 30-minute requirement	Neuro	Ortho Yes	IR
Patient destination after ED	OR <input type="checkbox"/>	Floor <input checked="" type="checkbox"/>	ICU <input type="checkbox"/> IR <input type="checkbox"/> Other
OR timeline	In OR 10/14	Incision	Out of OR
Final destination	Floor <input checked="" type="checkbox"/>	ICU <input type="checkbox"/>	Other
Time arr at final destination in hospital	2038		
LOS	ED 4 hr 7 min	ICU 3 days	Hospital 6 days
SBIRT screening completed	Yes <input checked="" type="radio"/>	No <input type="radio"/>	NA <input type="radio"/>
If Yes, SBIRT intervention offered	Yes <input type="radio"/>	No <input checked="" type="radio"/>	
Timeline of transfers between units	Date 00/00	Time 2028 (admit trauma unit)	
	Date 00/01	Time 1332 (OR)	
	Date 00/01	Time 1957 (SICU)	

Pages

Bookmark List

- This is the bookmark list from a trauma program supporting document, the Administrative binder
 - This one has main bookmarks only, no sub-bookmarks



A screenshot of a PDF viewer's bookmark list for a document titled "Administrative.pdf". The list contains 13 main-level bookmarks, each with a small icon to its left. The icons are: a document icon for items 01-02, a grid icon for items 03-06, and a document icon for items 07-13. The items are listed as follows:

Item Number	Item Name
01	Board resolution
02	Medical staff letter
03	Org chart
04	Job description TPM
05	Job description TMD
06	Job description IPC
07	Job description SBIRT
08	CME TMD
09	CEU TPM
10	CME & certs registrar
11	CME alt pathway surgeon
12	Map
13	Advanced practice providers

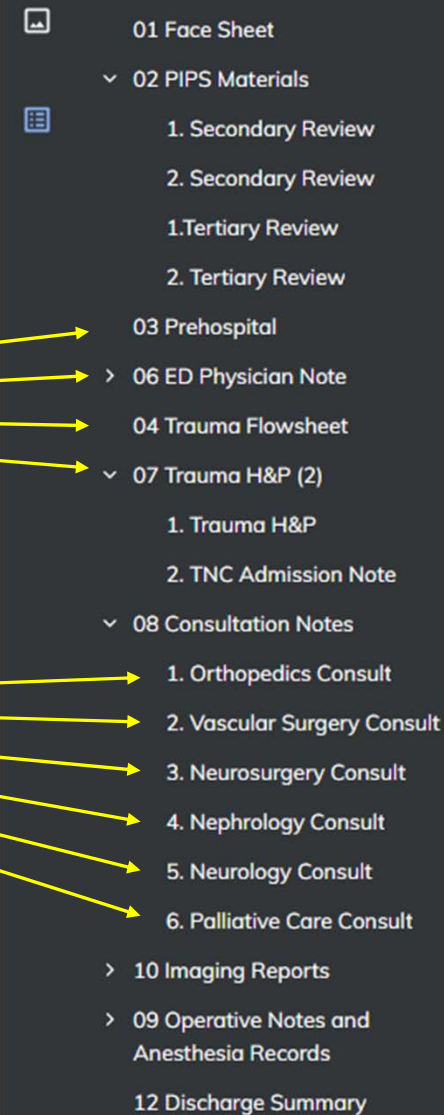
Bookmark List

- Bookmark list from a medical chart (partially expanded)

- Contains main bookmarks (the ">" or "v" indicate the presence of sub-bookmarks)

- And sub-bookmarks

Note: sub-bookmarks assist with organization but are optional



01 Face Sheet

02 PIPS Materials

- 1. Secondary Review
- 2. Secondary Review
- 1. Tertiary Review
- 2. Tertiary Review

03 Prehospital

> 06 ED Physician Note

04 Trauma Flowsheet

07 Trauma H&P (2)

- 1. Trauma H&P
- 2. TNC Admission Note

08 Consultation Notes

- 1. Orthopedics Consult
- 2. Vascular Surgery Consult
- 3. Neurosurgery Consult
- 4. Nephrology Consult
- 5. Neurology Consult
- 6. Palliative Care Consult

> 10 Imaging Reports

> 09 Operative Notes and Anesthesia Records

12 Discharge Summary

Step By Step (not clear)

1. Design the bookmark structure for the final document (it is different for charts vs program documents)
2. Create and name individual documents included each sub-bookmark into a bookmark pdf file (if used), then create and name individual documents for each bookmark
 - Combine sub-bookmark documents into a bookmarked pdf
 - Repeat for all sub-bookmarks
 - Include combined documents from sub-bookmarks into the final documents
3. Combine all documents into the final bookmarked pdf
4. Assemble all files in appropriate folder in your file sharing service



1. Design The Bookmark Structure

- For medical charts – create only one pdf file per chart
 - Suggestion: name the final file after its PI category
- The bookmark structure has been defined by the COT-VRC in “Appendix 2 – Medical Record Review”
- Use items 1-14 as bookmark names

The required documentation (components) listed below must be bookmarked and labeled/indexed to each medical record selected by the lead reviewer in the following chronological order:

- 1) Patient’s medical record face sheet
- 2) PIPS materials
 - Documentation of each level of review (with date) with supporting information (timelines, etc.) with this case highlighted if multiple cases are present
 - Must include documentation of completed/closed loop closure
- 3) Prehospital
 - To outside hospital (if applicable)
 - To trauma center
- 4) Trauma flow sheet (or ED documentation if not TTA)
- 5) MTP summary (count of products including cryo)
- 6) ED physician note
- 7) Trauma H&P
- 8) Consultation notes (for specialist consulted in first 12 hours)
- 9) Operative notes within anesthesia sheet (for procedures in first 48 hours)
- 10) Imaging reports* (for studies within first 12 hours)
- 11) Child protective services consult (peds only)
- 12) Discharge summary
- 13) Autopsy report, if applicable
- 14) Copy of the guidelines/protocols followed to care for the injured trauma patient, e.g. MTP activation, trauma team activation, neurosurgery/orthopaedic surgery (if applicable), organ procurement, etc. (Refer to APPENDIX 1 – VIRTUAL or FOCUSED VISIT DOCUMENTATION REQUIREMENTS)

*Physician progress notes and films are not required to be scanned/sent in advance. They may be requested during the virtual site visit upon the reviewers’ request.

1. Design The Bookmark Structure

For the required supporting documents, the name for each file should be based on their content. There are no standard bookmark names. They should be named based on their content.

- Administrative
- Trauma Service
- Neurosurgery
- Orthopaedic surgery
- Radiology
- Trauma Registry
- Performance Improvement
- Research (Level I centers only)
- Community outreach - injury prevention



2 & 3. Creating And Naming Documents

- All source documents must be in PDF or Word format
- Each document can be created by
 - Using an existing Word document
 - Printing any document or EMR report to PDF format
 - Scanning an already printed document to PDF format

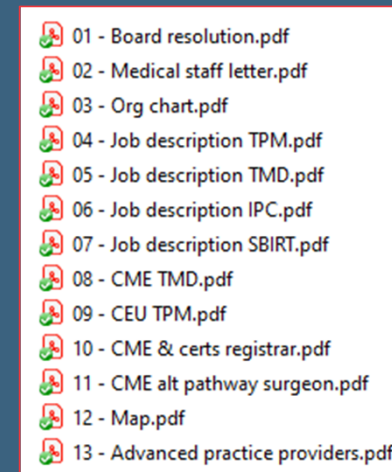
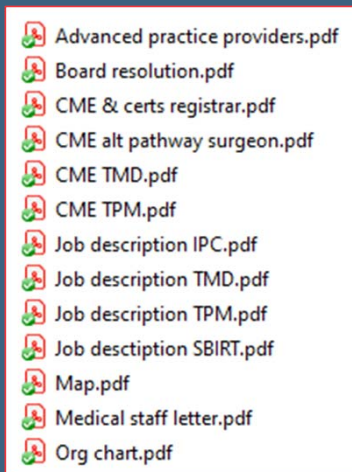


2 & 3. Creating And Naming Documents

- Bookmark and sub-bookmark file names should be short, yet descriptive of the content (see Bookmark List slide)

Note: Windows and MacOS will alphabetize your source files, which may place them in an undesirable order

2 & 3. Creating And Naming Documents



- Automatically sorted by Windows or MacOS in alphabetical order
- Files renamed with initial numbers to achieve the file order desired by the trauma program



4. Combine All Documents

- Create a PDF for each sub-bookmark in a document first, then combine using instructions on the following slides to create a bookmark PDF file for the final document.
 - Example: to create the Consults tab of a medical chart
 - Print each consult to be included as an individual PDF file.
 - Neurosurgery consult
 - Orthopaedics consult
 - Combine these two PDFs into a new PDF called **8. Consults**
- Once PDFs for all bookmarks have been created, combine them into the final document
 - Example: combine files **1. Face sheet, 2. PIPS, 3. EMS, ..., 8. Consults, ..., 14. Autopsy** into a new PDF called **1. Unanticipated mortality #1**



4. Combine All Documents

- First, place all documents to be combined into a working folder. The folder could contain:
 - A collection of sub-bookmark source files being combined into a bookmark PDF
- OR
- A collection of bookmark PDF files being combined into a final bookmarked chart or supporting document PDF

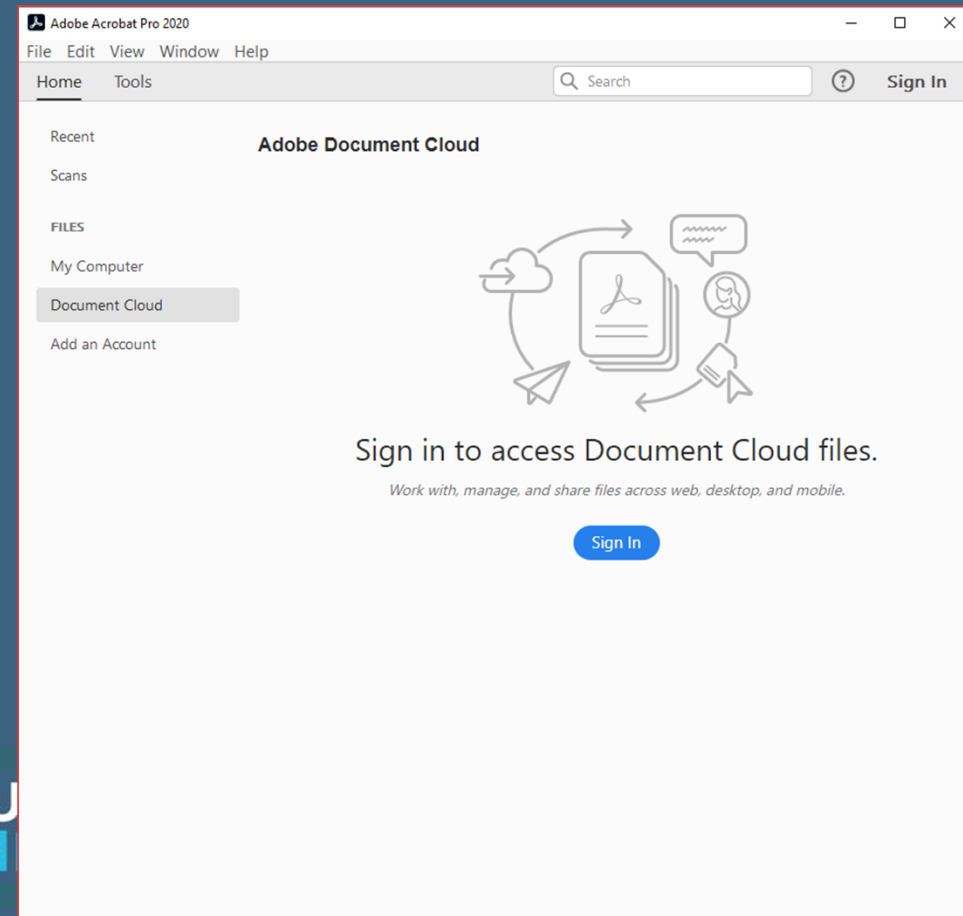
Example of files in a working folder

- 01 - Board resolution.pdf
- 02 - Medical staff letter.pdf
- 03 - Org chart.pdf
- 04 - Job description TPM.pdf
- 05 - Job description TMD.pdf
- 06 - Job description IPC.pdf
- 07 - Job description SBIRT.pdf
- 08 - CME TMD.pdf
- 09 - CEU TPM.pdf
- 10 - CME & certs registrar.pdf
- 11 - CME alt pathway surgeon.pdf
- 12 - Map.pdf
- 13 - Advanced practice providers.pdf



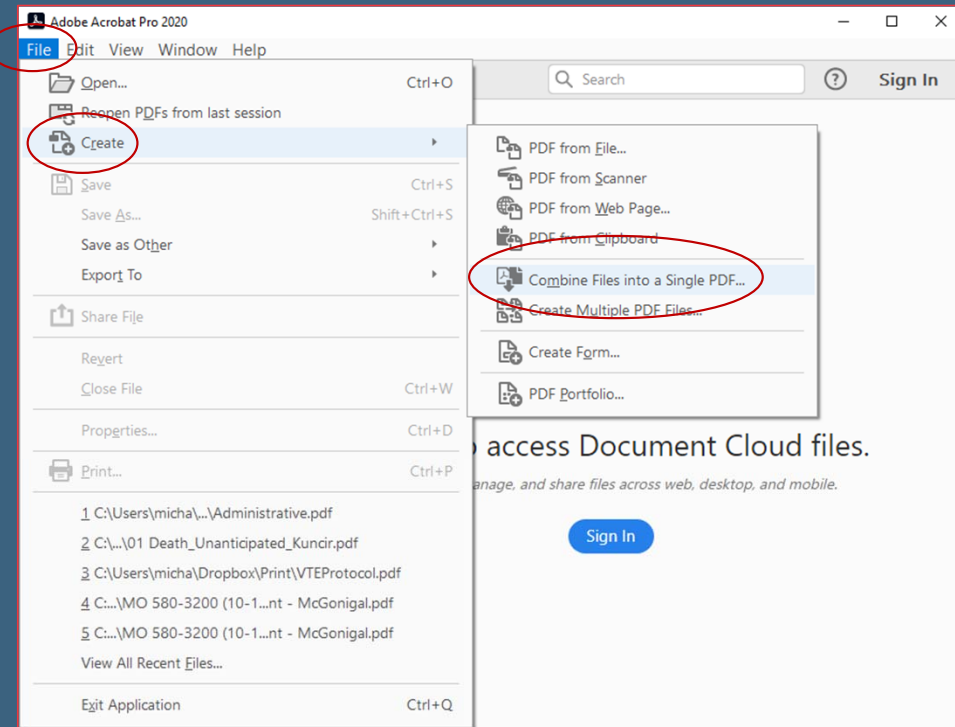
4. Combine All Documents

- Open Adobe Acrobat



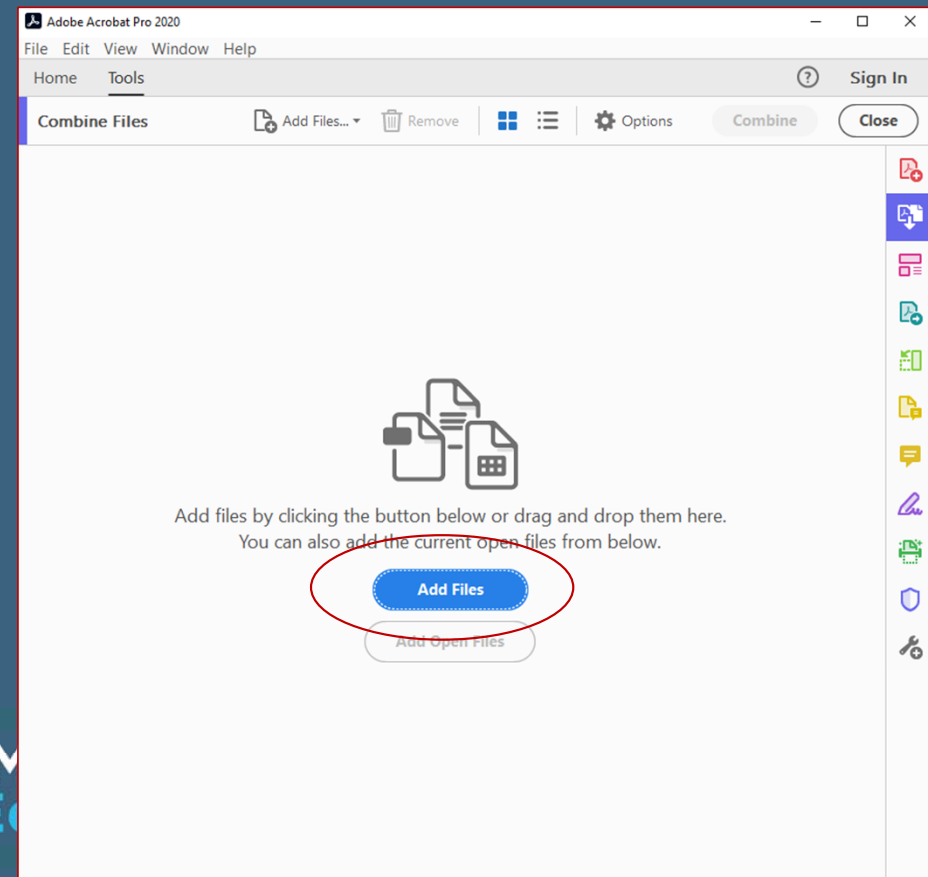
4. Combine All Documents

- Click the **File** menu item, then **Create**, then **Combine Files into a Single PDF**



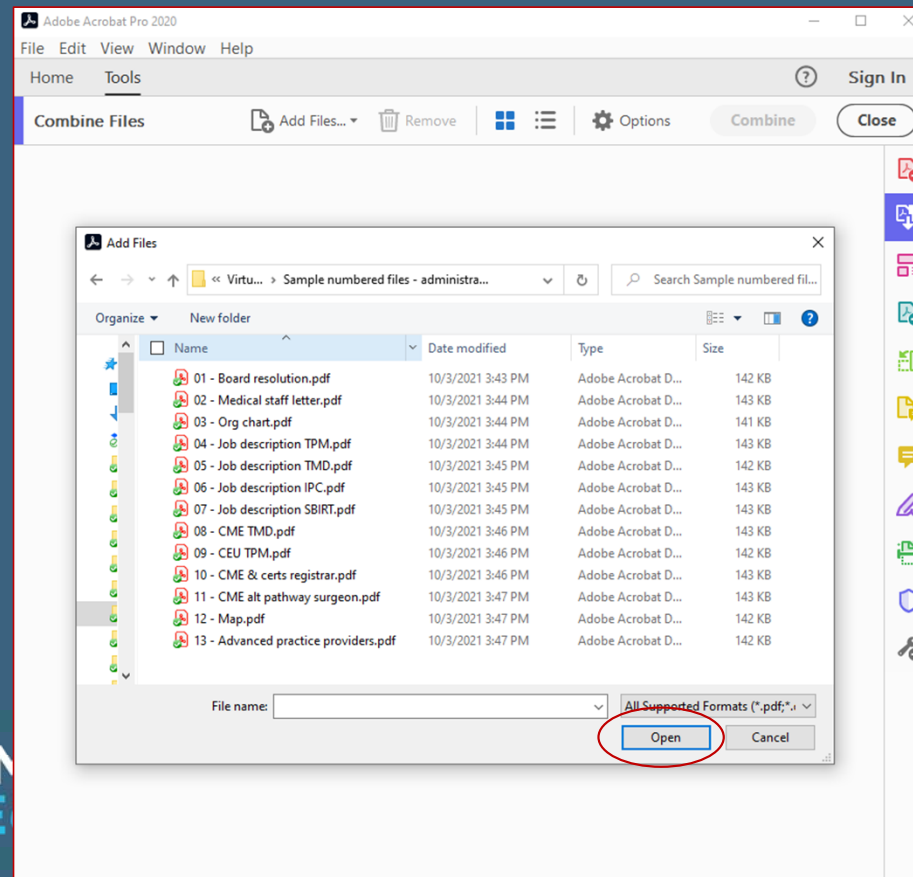
4. Combine All Documents

- Click the **Add Files** button



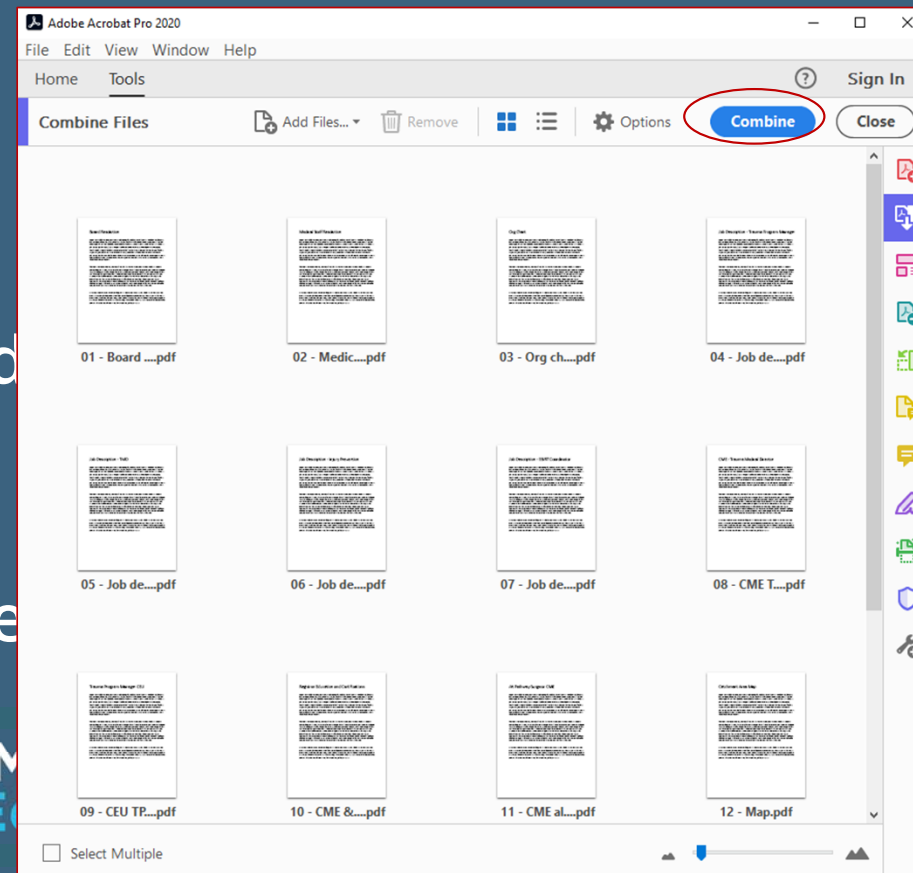
4. Combine All Documents

- In the **Add Files** box, move to the working folder that houses the files you want to combine
- Select the files to be included in the combined file
 - Select a file, then type ctrl-A (or cmd-A on the Mac) to select all
 - OR
 - Select the first file, then ctrl-click each additional file to be included
- Click the **Open** button at the lower right



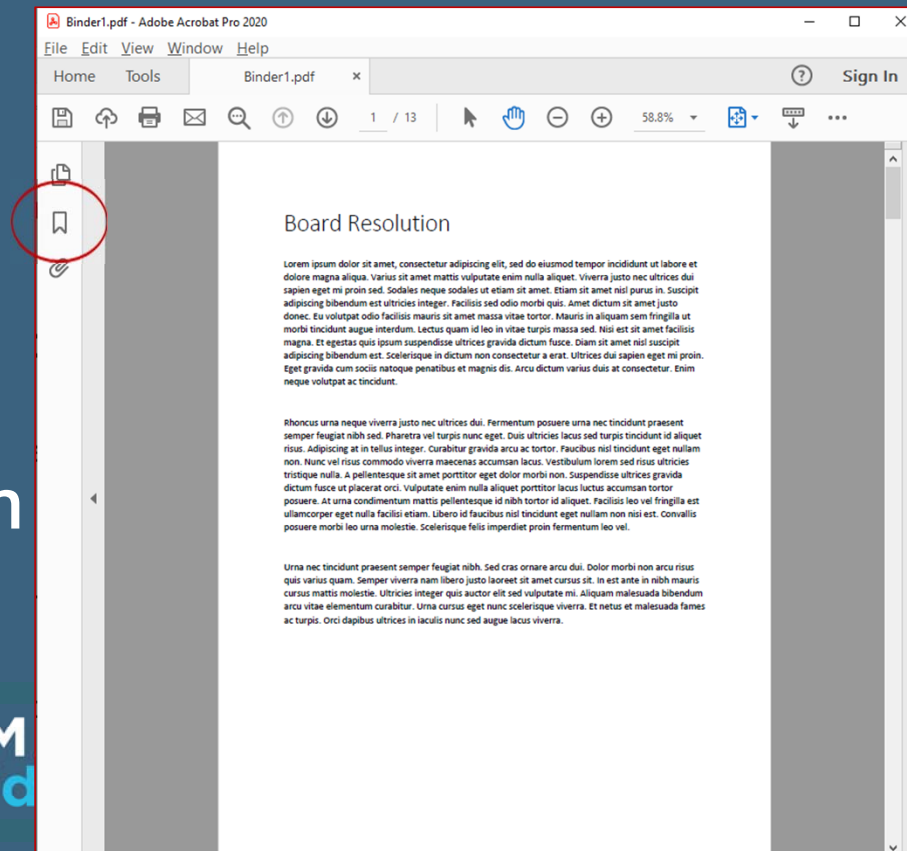
4. Combine All Documents

- Images of each file will appear in order
- If any are out of order, click and drag into the correct location
- Click the **Combine** button in the upper right



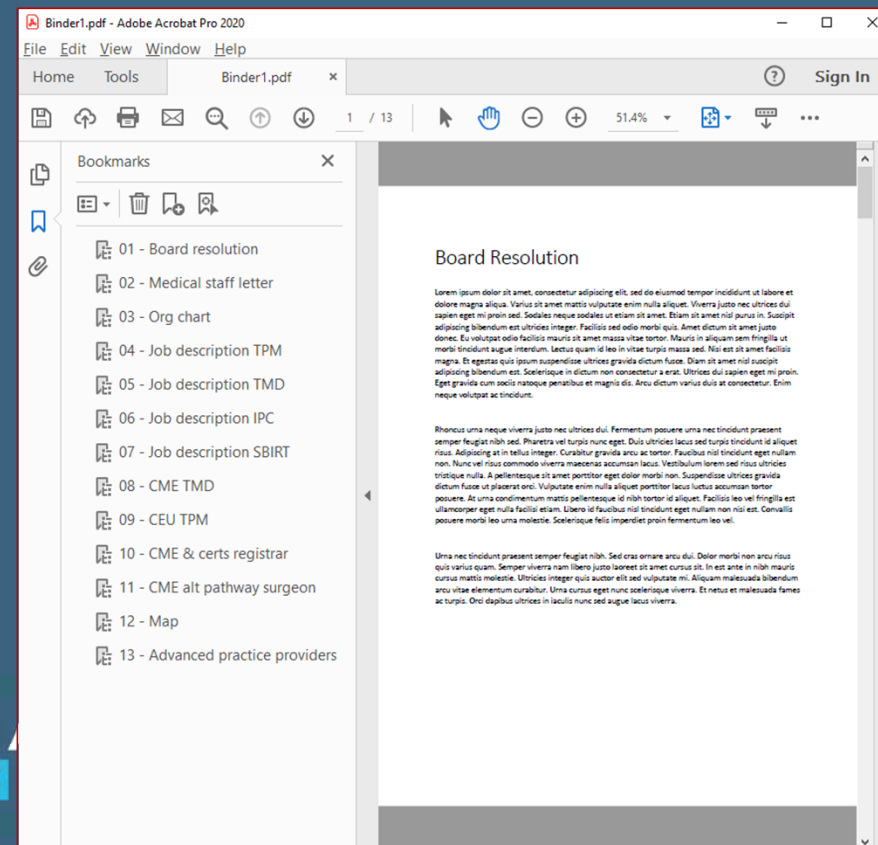
4. Combine All Documents

- Acrobat will now display the new, combined file **without bookmarks**.
- Click the **Bookmarks** icon on the upper left to display them



4. Combine All Documents

- Now save your file with a descriptive name to the desired location
 - The default name is Binder1.pdf
 - Click the **File** menu, then **Save As**
 - Pick the correct folder location and type in the desired final file name



4. Combine All Documents

- If PDF files with their own bookmarks were included, all bookmarks and sub-bookmarks will be open.
- For a cleaner look, collapse them by clicking the **Bookmark Options** button located directly above the bookmark list



The screenshot shows the Adobe Acrobat Pro 2020 interface. The top menu bar includes File, Edit, View, Window, and Help. The main window displays a PDF document titled "Sample bookmarked PDF.pdf". The left sidebar shows a "Bookmarks" panel with a list of 14 items, including "1. Face sheet", "2. PI materials", "3. Prehospital", "4. Trauma Flow Sheet", "5. MTP report", "6. Emergency Physician Note", "7. Trauma H&P", "8. Consult Notes", "9. Operative Notes with anesthesia records", "10. Imaging reports", "11. Child Protective Services consult", "12. Discharge summary", "13. Autopsy report", and "14. Practice guidelines". A red circle highlights the "Bookmark Options" button (a small icon with a downward arrow) located above the bookmark list. A red arrow points from the second bullet point in the text to this button.

The main content area displays the "ACS Review Trauma Reverification Patient Face Sheet" form, which is a table with various fields for patient information, trauma team activation, and hospital services. The form includes sections for "Patient", "MRN/Trauma registry #", "Category of Chart", "ISS", "EMS Scene Time", "Trauma Team Activation", "Patient arrival date/time to trauma bay/ED", "Time of initial imaging", "MTP activated", "Consultant services engaged in ED", "Response time for services with 30-minute requirement", "Patient destination after ED", "OR timeline", "Final destination", "Time arr at final destination in hospital", "LOS", "SBIRT completed", "If Yes, SBIRT intervention offered", and "Timeline of transfers between units".

At the bottom of the page, there is a footer with the text "AMERICAN COLLEGE OF SURGEONS | October 7, 2021" and logos for "THE COMMITTEE ON TRAUMA" and "AMERICAN COLLEGE OF SURGEONS".

4. Combine All Documents

- Then click **Collapse Top-level Bookmarks**



The screenshot shows the Adobe Acrobat Pro 2020 interface. The Bookmarks panel is open on the left, with the 'Collapse Top-Level Bookmarks' option circled in red. The main content area displays a form titled 'ACS Review Trauma Reverification Patient Face Sheet' from the VRC (Verification Review Committee) of the American College of Surgeons. The form includes various fields for patient information, trauma team activation, imaging, and destination.

VRC		A QUALITY PROGRAM of the AMERICAN COLLEGE OF SURGEONS	
for excellence in trauma centers			
ACS Review Trauma Reverification Patient Face Sheet (To be completed on every chart selected)			
Patient Name			
Age		Sex	
MRN/Trauma registry #			
Category of Chart			
ISS			
EMS Scene Time			
Trauma Team Activation	Yes <input type="radio"/>	No <input type="radio"/>	Level
Patient arrival date/time to trauma bay/ED	Date	Time	Surgeon arr time
Time of initial imaging	Chest xray	Pelvic xray	CT
MTP activated	Yes <input type="radio"/>	No <input type="radio"/>	Time
Consultant services engaged in ED			
Response time for services with 30-minute requirement	Neuro	Ortho	IR
Patient destination after ED	OR <input type="checkbox"/>	Floor <input type="checkbox"/>	ICU <input type="checkbox"/>
OR timeline	In OR	Incision	Out of OR
Final destination	Floor <input type="checkbox"/>	ICU <input type="checkbox"/>	Other
Time arr at final destination in hospital			
LOS	ED	ICU	Hospital
SBIRT completed	Yes <input type="radio"/>	No <input type="radio"/>	NA <input type="radio"/>
If Yes, SBIRT intervention offered	Yes <input type="radio"/>	No <input type="radio"/>	
Timeline of transfers between units	Date	Time	
	Date	Time	
	Date	Time	

4. Combine All Documents

- Be sure to save the file again before closing



Sample bookmarked PDF.pdf - Adobe Acrobat Pro 2020

File Edit View Window Help

Home Tools Binder1.pdf Sample bookmarke... x

1 / 32 69.1%

Bookmarks

- 1. Face sheet
- 2. PI materials
- 3. Prehospital
- 4. Trauma Flow Sheet
- 5. MTP report
- 6. Emergency Physician Note
- 7. Trauma H&P
- 8. Consult Notes
- 9. Operative Notes with anesthesia records
- 10. Imaging reports
- 11. Child Protective Services consult
- 12. Discharge summary
- 13. Autopsy report
- 14. Practice guidelines

VRC VERIFICATION REVIEW COMMISSION OF THE AMERICAN COLLEGE OF SURGEONS
A QUALITY PROGRAM OF THE AMERICAN COLLEGE OF SURGEONS
for excellence in trauma centers

ACS Review Trauma Reverification Patient Face Sheet
(To be completed on every chart selected)

Patient	Name		
	Age	Sex	
MRN/Trauma registry #			
Category of Chart			
ISS			
EMS Scene Time			
Trauma Team Activation	Yes <input type="radio"/>	No <input type="radio"/>	Level
Patient arrival date/time to trauma bay/ED	Date	Time	Surgeon arr time
Time of initial imaging	Chest xray	Pelvic xray	CT
MTP activated	Yes <input type="radio"/>	No <input type="radio"/>	Time
Consultant services engaged in ED			
Response time for services with 30-minute requirement	Neuro	Ortho	IR
Patient destination after ED	OR <input type="checkbox"/>	Floor <input type="checkbox"/>	ICU <input type="checkbox"/>
OR timeline	In OR	Incision	Out of OR
Final destination	Floor <input type="checkbox"/>	ICU <input type="checkbox"/>	Other
Time arr at final destination in hospital			
LOS	ED	ICU	Hospital
SBIRT completed	Yes <input type="radio"/>	No <input type="radio"/>	NA <input type="radio"/>
If Yes, SBIRT intervention offered	Yes <input type="radio"/>	No <input type="radio"/>	
Timeline of transfers between units	Date	Time	
	Date	Time	
	Date	Time	

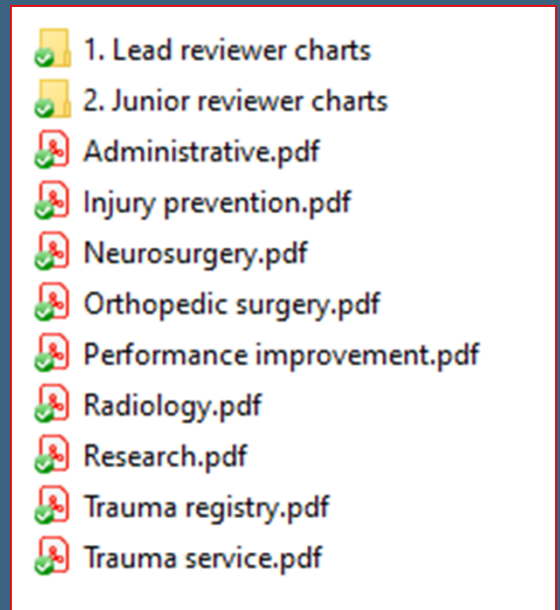
AMERICAN COLLEGE OF SURGEONS | www.facs.org
October 2021

Questions? coltra@facs.org

THE COMMITTEE ON TRAUMA
AMERICAN COLLEGE OF SURGEONS
Promoting Quality
Patient Care, Better Outcomes
100 years

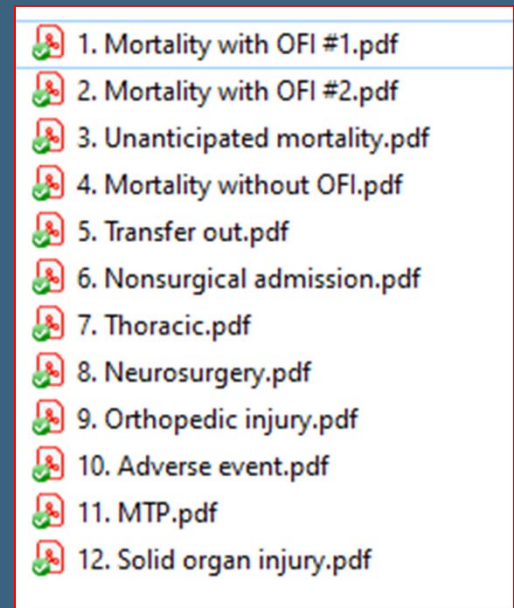
5. Assemble Files For Sharing

- This is an example of a very simple file sharing structure
- Each reviewer has a separate directory for their medical charts
- The remaining supplemental documents are housed in the main directory



5. Assemble Files For Sharing

- This is an example of the files included in one of the reviewer directories
- It contains one PDF file for each chart requested on the PCR form





**KEEP
CALM
it
is
FINISHED**