



# Clinical Data Abstraction Best Practices Checklist

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- ✓ Refined management and delivery model with clearer escalation paths and stronger leadership coverage during surge periods.
- ✓ Established the e4health CDA Academy with standardized onboarding, train-the-trainer curriculum, and micro-education from audit insights.
- ✓ Created a surge-ready roster of pre-screened abstractors with streamlined access provisioning.
- ✓ Adopted a 30–40% surge capacity buffer and advance access provisioning as standard for new projects.
- ✓ Implemented mandatory 7-14-day time studies before finalizing productivity SLAs.
- ✓ Built a rolling talent pipeline adding 15–20% new team members per project for scalability and stability.
- ✓ Pre-vetted overflow partners with defined quality scorecards and surge SLAs for flexible response capability.
- ✓ Institutionalized "Plan B" playbooks for manual abstraction with QA checkpoints.
- ✓ Formalized weekend and after-hours governance for critical cutover periods.