

This section is intended to guide reviewers through specific factors that may have contributed to morbidity or care during a severe maternal morbidity (SMM) chart review. Use of this tool may support completion of the SMM Review Form, particularly in determining whether there was any chance to prevent or minimize morbidity and which factors may have contributed to morbidity. This tool can also be used to further identify opportunities for improvement if used as part of an SMM chart review.

SYSTEM & PROVIDER FACTORS	How did these factors contribute to the morbidity?	
	Present	List details here
Inadequate delivery planning		
Diagnosis, incorrect, delayed, or other		
Treatment not in line with best practice guidelines and recommendations		
Team communication breakdown		
Patient care team hierarchy challenges (e.g., RN to physician, resident to attending)		
Provider and staff education and knowledge deficits		
Barriers or delays in referral process for specialty care or evaluation needs		
Transfer to a higher level of care (intrafacility)		
Transfer to a higher level of care (interfacility)		
Deficits in policies or facility guidance		
Incomplete or inaccurate documentation		
Lack of equipment and resources		
Inadequate language translation services for patient care		
Barriers preventing patient access to recommended care		

SYSTEM & PROVIDER FACTORS	How did these factors contribute to the morbidity?	
	Present	List details here
Barriers preventing patient access to recommended follow-up care		
Deficits in discharge planning and process (including education on warning signs and when to seek care)		

PATIENT & SSDOH FACTORS	How did these factors contribute to the SMM?	
	Present	Other, list specifics details here
Pre-pregnancy existing medical conditions		
Non-obstetric medical complication/condition that occurred during pregnancy		
Psychiatric/Behavioral health <ul style="list-style-type: none"> <li>• Substance use (i.e., tobacco, alcohol, other substances)</li> <li>• Psychiatric condition</li> <li>• Intellectual or cognitive disability</li> <li>• Other (specify)</li> </ul>		
Existing obstetric condition (initially noted in pregnancy, e.g., IVF)		
New obstetric conditions (evolved throughout care, e.g., PPROM)		
Significant unmet social needs or factors <ul style="list-style-type: none"> <li>• Intimate partner violence</li> <li>• Lack of food access</li> <li>• Lack of housing</li> <li>• Lack of transportation</li> <li>• Faith beliefs</li> <li>• Cultural practices</li> <li>• Limited English proficiency or communication barriers</li> <li>• Other financial barrier</li> <li>• Other</li> </ul>		