

Chart Audit Field Note & Chart Stimulated Recall Worksheet

Examples where the clinical record raises questions about: responses to abnormal findings; evidence for diagnoses; choices of investigations or treatments; or diligence of follow-up.

[Record either a chart ID#, or the combination of patient initials and date of birth and recent date of visit. DO NOT RECORD PATIENTS' NAMES.]

Chart ID#:	OR	Patient's	DOB:	Date of Visit::
		Initials:	202.	246 01 136
Question #:				
	Fie	ld Notes from	m Chart Audit Wo	rksheet
	When comple	eting the CSR be	clow, please refer to the l	ist of CSR questions.
Chart Stimulated Recall (CSR)				



Chart Audit Field Note & Chart Stimulated Recall Interview Worksheet

A. THIS VISIT

1. General

(a) "Please tell me about this visit." [Alternative: "Please outline your approach to the presenting complaint and highlight the key points."]

2. Clinical Assessment

- (a) "What specific features led you to this diagnosis or clinical impression?"
- (b) "Were there any other conditions that you ruled out?"

3. **Investigations and Referrals**

- (a) "What specific features led you to the investigations/referrals you chose?"
- (b) "Were there any other investigations/referrals that you thought about, deferred or ruled out?"

4. Treatment

- (a) "What specific features led you to the management you chose?"
- (b) "Were there any other treatments that you thought about, deferred or ruled out?" [Alternative: "I note that you ordered 'XYZ'. What factors influenced your choice?" "Were there any other medications you considered?"]

5. **Follow-up**

- (a) "Do you recall if there was a decision about follow-up?"
- (b) "What were the factors that influenced your decision?"

B. COMPREHENSIVENESS OF CARE

1. Monitoring Chronic Disease

- (a) "In your care of this patient, have you discussed the monitoring of his/her chronic disease/progress?"
- (b) "On reflection, do you think there are some monitoring strategies that would be appropriate?"

2. Health Promotion and Prevention

- (a) "In your care of this patient, have you discussed preventive interventions? (e.g. BP, mammography, smoking cessation, alcohol use, lifestyle change, diet, exercise, etc.)"
- (b) "On reflection, do you think there are some interventions that would be appropriate?"

C. CONTEXT OF CARE

1. **Patient Factors**

(a) "Patient characteristics sometimes influence decision-making. Was there anything special about this patient that influenced your decisions regarding management? (e.g.

- $psychosocial\ issues, compliance, past\ medical\ history, current\ medications, support\ systems, employment)''$
- (b) "On reflection, is there anything about this patient you wish you knew more about?"

2. **Practice/System Factors**

- (a) "Is there anything special about your practice setting that influenced your management in this case? (e.g. a nurse educator, lack of access to laboratory or x-ray)"
- (b) "On reflection, what changes would improve your ability to deliver care to this patient?"