





## 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?"