

# Peer Advisory Conversation

## CHART STIMULATED RECALL (CSR) / CASE BASED DISCUSSION



### Overall Considerations

Areas to consider during discussion of the cases:

1. Diagnosis
2. Diagnostic testing and interpretation (lab work/imaging)
3. Medical Management
4. Prescribing, dispensing, or administering drugs
5. Record management
6. Biosecurity
7. Disease surveillance
8. Dental procedures, including the scaling of teeth

Are published protocols being implemented? (e.g. AAHA American Animal Hospital Association; Patient care; Vaccines; Practice standards; Case review; Hospital protocols.) If not using a published protocol, how were protocols developed and are they appropriate for the case?

Note: The general questions with each case do not have to be discussed with *all* cases – a selection of these questions can be discussed with each case so that ultimately all are covered.

### Introductory General Questions

Questions
1. Could you explain why you picked these particular cases?
2. How do these four medical records reflect your practice?

## Surgical Case

Questions
1. Tell me about this case in your own words.
2. How did you approach the pre-surgical assessment?
3. How did you obtain informed consent from the client prior to surgery?
4. What are your protocols for surgery? (e.g. anaesthesia, analgesia)
5. How did you use staff during surgery?
6. What type of anaesthetic monitoring did you do and who did it?
7. Tell me about how you monitored this patient after surgery.
8. What was your discharge information to the client? a. May follow-up to check whether they have routine discharge information.
9. What are your plans for surgical follow-up?
10. Was any component of the treatment delegated? If so, what was delegated and what was the process used for this delegation?
11. How did you fulfill the veterinary-client-patient relationship (VCPR)?

## General Questions: Surgical Case

Questions
1. Take a moment to reflect back on this case. How did the patient condition progress compared to what you had expected? What factors were considered?
2. When treating patients with this or a similar type of condition: <ol style="list-style-type: none"> <li>a. Knowing what you know now, is there anything about this patient you wish you had done differently?</li> <li>b. Did you look up new information to provide a solution to the presenting problem?</li> </ol>
3. Please share any learning opportunities you may have identified arising from the management of this patient's condition. <ol style="list-style-type: none"> <li>a. What, if anything, would you have done differently</li> <li>b. How could this new learning influence future management of patients presenting with similar conditions?</li> </ol>
4. If you were to read this medical record for the first time. Would you have everything you need to provide continuing treatment for this patient?
5. Were there any particular challenges in managing this case? If yes, tell me more about this. <ol style="list-style-type: none"> <li>a. Did you have to consult with anyone to manage this case? If yes, how did you approach this?</li> </ol>
6. How did you have conversations of finances with this client?
7. Communicating complications <ol style="list-style-type: none"> <li>a. How did you communicate complications to this client? (e.g. unexpected death, errors, unexpected surgical findings, adverse pharmaceutical events)</li> </ol>

## Emergency Case or Acute Condition

Questions
1. Tell me about this case in your own words.
2. How did you approach the assessment of this patient?
3. How did you obtain informed consent from the client to proceed with treatment?
4. Is this typical of the emergency/acute condition presentations you see?
5. How did you deal with the client's emotional response to the emergency/acute care needs?
6. How did you decide whether to refer to a specialist or hospitalize overnight? Note: Keep in mind that there may be situations where the resources are not available to the veterinarian.
7. What were your discharge instructions to the client?
8. What were your plans for follow-up?
9. How did you collect information that is going to go to an insurance company?
10. How did you manage the chaos during the emergency (e.g. staff, drugs, medical records)
11. How did you engage the client in discussions around end-of-life in this emergency/acute care situation? (If appropriate)
12. How did you fulfill the veterinary-client-patient relationship (VCPR)?
13. How is it that you provide emergency/ acute care service for your regular clients? (e.g. after hours)
14. Did you have to report any diseases in this case? a. How do you maintain current knowledge of reportable diseases?
15. Was any component of the treatment delegated? If so, what was delegated and what was the process used for this delegation?

## General Questions: Emergency Case or Acute Condition

<b>Questions</b>
1. Take a moment to reflect back on this case. How did the patient condition progress compared to what you had expected? What factors were considered?
2. When treating patients with this or a similar type of condition: <ol style="list-style-type: none"> <li>a. Knowing what you know now, is there anything about this patient you wish you had done differently?</li> <li>b. Did you look up new information to provide a solution to the presenting problem?</li> </ol>
3. Please share any learning opportunities you may have identified arising from the management of this patient's condition. <ol style="list-style-type: none"> <li>a. What, if anything, would you have done differently</li> <li>b. How could this new learning influence future management of patients presenting with similar conditions?</li> </ol>
4. If you were to read this medical record for the first time. Would you have everything you need to provide continuing treatment for this patient?
5. Were there any particular challenges in managing this case? If yes, tell me more about this. <ol style="list-style-type: none"> <li>a. Did you have to consult with anyone to manage this case? If yes, how did you approach this?</li> </ol>
6. How did you have conversations of finances with this client?
7. Communicating complications <ol style="list-style-type: none"> <li>a. How did you communicate complications to this client? (e.g. unexpected death, errors, unexpected surgical findings, adverse pharmaceutical events)</li> </ol>

## Wellness or Routine Visit

Questions
1. Tell me about this case in your own words.
2. Describe how you conducted the wellness visit for this animal.
3. How frequently do you do wellness visits or herd health visits for this animal/client?
4. How did you develop your treatment or management protocols for this client?
5. What recommendations did you make to the client (e.g. vaccinations)?
6. What information was important for you to gather?
7. What other services are affiliated with the client and how do you work with them? (e.g. feed companies/groomers)
8. What information have you given to this client? (e.g. diseases, nutritional information, recalls)
9. How did you fulfill the veterinary-client-patient relationship (VCPR)?
10. How do you monitor any chronic conditions, treatments or management issues for this animal/herd?
11. What types of preventive care did you discuss with this client?
12. What type of follow-up did you recommend?
13. How do you keep current on recommendations (e.g. vaccinations)?

## General Questions: Wellness or Routine Visit

Questions
1. Take a moment to reflect back on this case. How did the patient condition progress compared to what you had expected? What factors were considered?
2. When treating patients with this or a similar type of condition: <ol style="list-style-type: none"> <li>a. Knowing what you know now, is there anything about this patient you wish you had done differently?</li> <li>b. Did you look up new information to provide a solution to the presenting problem?</li> </ol>
3. Please share any learning opportunities you may have identified arising from the management of this patient's condition. <ol style="list-style-type: none"> <li>a. What, if anything, would you have done differently</li> <li>b. How could this new learning influence future management of patients presenting with similar conditions?</li> </ol>
4. If you were to read this medical record for the first time. Would you have everything you need to provide continuing treatment for this patient?
5. Were there any particular challenges in managing this case? If yes, tell me more about this. <ol style="list-style-type: none"> <li>a. Did you have to consult with anyone to manage this case? If yes, how did you approach this?</li> </ol>
6. How did you have conversations of finances with this client?
7. Communicating complications <ol style="list-style-type: none"> <li>a. How did you communicate complications to this client? (e.g. unexpected death, errors, unexpected surgical findings, adverse pharmaceutical events)</li> </ol>
8. Was any component of the treatment delegated? If so, what was delegated and what was the process used for this delegation?

## Chronic Condition or Complex Diagnosis

Questions
1. Tell me about this case in your own words.
2. How do you monitor how the patient is doing? OR
3. How did you approach the assessment of this patient?
4. Have you offered referrals for this patient?
5. What methods have you used to investigate alternative treatments?
6. How did you obtain informed consent from the client for diagnostic or treatment recommendations?
7. How do you monitor compliance with your recommendations?
8. For what period of time do you refill drugs or renew prescriptions? (If applicable)
9. How did you communicate the expected cost of managing a condition to the client?
10. How did you assess the quality of life for the patient?
11. How did you discuss disease progression with the client?
12. How did you engage your client in discussions around end-of-life or depopulation?
13. How did you fulfill the veterinary-client-patient relationship (VCPR)?



## General Questions: Chronic Condition or Complex Diagnosis

Questions
1. Take a moment to reflect back on this case. How did the patient condition progress compared to what you had expected? What factors were considered?
2. When treating patients with this or a similar type of condition: <ol style="list-style-type: none"> <li>a. Knowing what you know now, is there anything about this patient you wish you had done differently?</li> <li>b. Did you look up new information to provide a solution to the presenting problem?</li> </ol>
3. Please share any learning opportunities you may have identified arising from the management of this patient's condition. <ol style="list-style-type: none"> <li>a. What, if anything, would you have done differently</li> <li>b. How could this new learning influence future management of patients presenting with similar conditions?</li> </ol>
4. If you were to read this medical record for the first time. Would you have everything you need to provide continuing treatment for this patient?
5. Were there any particular challenges in managing this case? If yes, tell me more about this. <ol style="list-style-type: none"> <li>a. Did you have to consult with anyone to manage this case? If yes, how did you approach this?</li> </ol>
6. How did you have conversations of finances with this client?
7. Communicating complications <ol style="list-style-type: none"> <li>a. How did you communicate complications to this client? (e.g. unexpected death, errors, unexpected surgical findings, adverse pharmaceutical events)</li> </ol>
8. Was any component of the treatment delegated? If so, what was delegated and what was the process used for this delegation?

## Additional General Questions

Note: If these topics did not come up during any of the cases, follow-up with these questions.

Questions	
1.	<u>Complications</u> Describe a time when you had to communicate complications (e.g. unexpected death, errors, unexpected surgical findings, adverse pharmaceutical events) to a client.
2.	<u>Responding to requests for medical information</u> What arrangements are in place to respond to medical information requests in a timely way?
3.	<u>Audit Trail</u> How do you assure that an audit trail is established which preserves the original content of the medical record? (e.g. Records the date/time of the change; Changes approved by the veterinarian?)
4.	<u>Confidentiality</u> What procedures and protocols are in place to protect client confidentiality and safeguard records? (e.g. Are records stored appropriately to ensure patient confidentiality and safeguard against loss or unauthorized access?)
5.	<u>Delegation of tasks</u> What is the process for delegation of tasks?

## References

Code of Ethics  
Professional Practice Standard Informed Client Consent  
Professional Practice Standard Delegation  
Professional Practice Standard Diagnostic Laboratory Testing  
Professional Practice Standard Dispensing Drugs  
Professional Practice Standard Prescribing Drugs  
Professional Practice Standard Use of Compounded Products in Veterinary Practice  
Professional Practice Standard Veterinarian-Client-Patient Relationship (VCPR)  
Professional Practice Standard Veterinary Dentistry  
Professional Practice Standard Management and Disposal of Controlled Drugs