

# Self-Assessment of Medical Records

## INFORMATION SHEET

The Self-Assessment Forms are provided by the College to help you and your team evaluate your own medical record keeping practices. Use of this tool may be helpful before your facility undergoes an Accreditation Inspection and/or before you or your practice participates in Peer Review of Medical Records. The self-assessment can be completed by an individual veterinarian or by the entire veterinary team as part of a group exercise.

The self-assessment can be used for paper or electronic records. Remember that all legislated requirements and standards of practice must also be present in computerized records including, for example, all client instructions, communications, logs, monitoring sheets, lab results, and test result interpretation.

The Self-Assessment Forms are based on the minimum legislated requirements for medical record keeping, as stipulated in Regulation 1093 under the *Veterinarians Act* and in the *Minimum Standards for Veterinary Facilities in Ontario*, and also in College publications that set out generally accepted standards of practice – especially the Professional Practice Standard and Guide to the Standard on Medical Records. You may wish to review these documents before you begin the self-assessment.

### Instructions

1. **Use one Self-Assessment Form per case.** The case types that you might consider including in your assessment are: wellness/vaccine or herd health, elective surgery (e.g. ovariohysterectomy, orchidectomy), other surgery, acute medical condition, chronic medical condition, and referral case.
2. **Answer “Yes” or “No”** in the columns for each component of the medical record that you are reviewing. If not applicable to the case, answer “N/A.”
3. **Review the number of “No”s** you have recorded, and identify concerns you have about any element of the record.
4. **Develop a plan** as to how you will improve the identified elements of your records (e.g. if you need to improve documentation of patient weights, your plan might be to implement a Cumulative Patient Profile form or a process at reception where all patients are weighed when clients check in with your staff).
5. **Give yourself credit.** The self-assessment exercise can be logged as a Continuing Professional Development (CPD) activity for veterinarians in Ontario. Record the time taken to conduct this self-assessment in your CPD Activity Log.
6. **Tell us what you think!** Was this exercise useful? Could the forms be improved? Send an email to the Quality Practice Team at [qualityassurance@cvo.org](mailto:qualityassurance@cvo.org) with your thoughts and suggestions.