

Peer Advisory Conversation

GUIDELINES ON SELECTION OF CASES AND SUBMISSION OF MEDICAL RECORDS



Selection of Cases and Submission of Medical Records

During the Peer Advisory Conversation, the Peer Advisor will discuss four (4) recent cases that you have treated using the Chart-Stimulated Recall (CSR)/Case Based Discussion Conversation Tool. For this purpose, please select four cases and submit the relevant medical records for each case prior to the conversation. Records for each case must be submitted to the College before the conversation can be scheduled. Keep the following guidelines in mind when selecting cases.

1. Cases should represent the breadth of your practice. Select cases that represent a variety of conditions and not all one type of animal or condition if applicable. If you provide veterinary dentistry services in your practice, please include medical records for one dentistry case. This case will be discussed using the same questions as a surgical case.
2. Select cases that are representative of the common conditions you see in your practice.
3. Submit more recent cases, from the past two years. When submitting records for chronic cases, please choose one that has been diagnosed in the past one to two years, with at least two follow-up assessments. The records prior to the diagnosis are not required to be submitted.
4. Each case and their accompanying medical record should reflect one of each of these focus areas:
 - a. A surgical case (or dentistry case)
 - b. An emergency case or acute condition
 - c. A wellness or routine visit
 - d. A chronic condition diagnosed within the past two years or, if not relevant, a complex diagnosis

Once selected, submit a copy of the medical record for each case. Please do not submit original records. Use one Case Cover Sheet for each case and organize the relevant record components that will help the Peer Advisor understand and follow the chronology of the case.

The following record components should be submitted for each case, where applicable:

- Client/Patient Identification Form(s)
- Emergency Contact Information Form(s)
- Consent Forms
- Client communications (discharge instructions, home care templates, discussion notes)
- Master Problem list or Cumulative Patient Profile
- History/PE Templates
- SOAP/DAP Forms, Progress Notes
- Protocols (i.e. surgical)
- Laboratory Reports
- Digital copies of diagnostic imaging (i.e., radiographs)
- Controlled Drug Logs
- Referral Letters
- Estimates, Invoices (you may redact prices if you wish)
- Monitoring Forms, Flow Sheets

Guidelines on Selection of cases and Submission of Medical Records

The following is a general guideline for what information to include for each case type:

- **Surgical Case:** include the pre-surgical assessment visit, the surgery, and the post-surgical assessment visit, as applicable
- **Emergency Case or Acute Condition:** include records from first diagnosis until resolution, as applicable
- **Wellness or Routine Visit:** include records that are applicable for that wellness/routine visit; if puppy or kitten wellness visits, then can include the whole vaccine series
- **Chronic Condition:** please choose one that has been diagnosed in the past one to two years. Include records from first diagnosis and at least two follow-up assessments

For radiographs, provide digital copies, if possible; please do not submit originals. If your practice does not have digital radiographs, please submit digital photos taken from the original radiographs.

Please complete a **Case Cover Sheet** for each case and submit it with the copy of the record.

Submission of Medical Records

The College has considered best practices for security of transferring medical records for the Peer Advisory Conversation and has implemented a system that will allow you to securely upload medical records to the CVO Cloud Drive.

Once you have been matched with a Peer Advisor, you will receive an email inviting you to upload your medical records to a secure folder on the CVO Cloud Drive. You will need to enter the following password to access the upload link: **PAC2020**

Please use the link to upload the four (4) medical records you have selected to use in the Peer Advisory Conversation.

If you are uploading multiple files for one medical record, it is recommended that you combine them into a compressed (zipped) folder named with the case type (e.g. surgical case, wellness visit, etc.), or begin the file names with the case type so that your Peer Advisor can easily identify which files belong to which medical record.

We ask that you please upload your medical records within three (3) weeks of receiving your information package from the College.

If you have any questions regarding selection and submission of medical records, please contact:

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