

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 Question

Questions
1. Could you explain why you picked these particular cases and how they reflect your practice?

Surgical Case

Questions
1. Tell me about this case in your own words.
2. What are your protocols for surgery? (e.g. anaesthesia, analgesia) <u>Probes:</u> a. How did you approach the pre-surgical assessment? b. How did you obtain informed consent from the client prior to surgery? c. How did you use staff during surgery? d. What type of anaesthetic monitoring did you do and who did it?
3. Tell me about how you monitored this patient after surgery.
4. What was your discharge information to the client? <u>Probe:</u> a. What are your plans for follow-up?
5. Was any component of the treatment delegated? If so, what was delegated and what was the process used for this delegation?
6. 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? <u>Probes:</u> a. Did you look up new information to provide a solution to the presenting problem? b. How could this new learning influence future management of patients presenting with similar conditions? c. Did you have to consult with anyone to manage this case? If yes, how did you approach this?
7. 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?
8. How did you have conversations of finances with this client?
9. How did you communicate complications to this client? (e.g. unexpected death, errors, unexpected surgical findings, adverse pharmaceutical events)

Emergency Case or Acute Condition

Questions
<p>1. Tell me about this case in your own words.</p> <p><u>Probes:</u></p> <ol style="list-style-type: none"> How did you approach the assessment of this patient? How did you obtain informed consent from the client to proceed with treatment?
<p>2. How did you deal with the client's emotional response to the emergency/acute care needs (including end-of-life, if appropriate)?</p> <p><u>Probe:</u></p> <ol style="list-style-type: none"> How did you communicate complications to this client? (e.g. unexpected death, errors, unexpected surgical findings, adverse pharmaceutical events)
<p>3. How did you decide whether to refer to a specialist or hospitalize overnight?</p> <p>Note: Keep in mind that there may be situations where the resources are not available to the veterinarian.</p>
<p>4. What were your discharge instructions to the client?</p> <p><u>Probe:</u></p> <ol style="list-style-type: none"> What were your plans for follow-up?
<p>5. How did you manage the chaos during the emergency (e.g. staff, drugs, medical records)</p>
<p>6. How is it that you provide emergency/ acute care service for your regular clients? (e.g. after hours)</p>
<p>7. Was any component of the treatment delegated? If so, what was delegated and what was the process used for this delegation?</p>
<p>8. 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?</p> <p><u>Probes:</u></p> <ol style="list-style-type: none"> Did you look up new information to provide a solution to the presenting problem? How could this new learning influence future management of patients presenting with similar conditions? Did you have to consult with anyone to manage this case? If yes, how did you approach this?
<p>9. 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?</p>
<p>10. How did you have conversations of finances with this client?</p>

Wellness or Routine Visit

Questions
<p>1. Tell me about this case in your own words.</p> <p><u>Probes:</u></p> <ol style="list-style-type: none"> What information was important for you to gather? Describe how you conducted the wellness visit for this animal How frequently do you do wellness visits or herd health visits for this animal/client?
<p>2. How did you develop your treatment or management protocols for this client?</p> <p><u>Probes:</u></p> <ol style="list-style-type: none"> What recommendations did you make to the client (e.g. preventive care, vaccinations)? How do you keep current on recommendations (e.g. vaccinations)? What information have you given to this client? (e.g. diseases, nutritional information, recalls) What type of follow-up did you recommend?
<p>3. What other services are affiliated with the client and how do you work with them? (e.g. feed companies, groomers)</p>
<p>4. 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?</p> <p><u>Probes:</u></p> <ol style="list-style-type: none"> Did you look up new information to provide a solution to the presenting problem? How could this new learning influence future management of patients presenting with similar conditions? Did you have to consult with anyone to manage this case? If yes, how did you approach this?
<p>5. 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?</p>
<p>6. How did you have conversations of finances with this client?</p>
<p>7. How did you communicate complications to this client? (e.g. unexpected death, errors, unexpected surgical findings, adverse pharmaceutical events)</p>
<p>8. Was any component of the treatment delegated? If so, what was delegated and what was the process used for this delegation?</p>

Chronic Condition or Complex Diagnosis

Questions
<p>1. Tell me about this case in your own words.</p> <p><u>Probes:</u></p> <ul style="list-style-type: none"> a. How do you monitor how the patient is doing? OR b. How did you approach the assessment of this patient?
<p>2. Have you offered referrals for this patient?</p> <p><u>Probe:</u></p> <ul style="list-style-type: none"> a. Have you investigated alternative treatments?
<p>3. How did you obtain informed consent from the client for diagnostic or treatment recommendations?</p>
<p>4. How do you monitor compliance with your recommendations?</p> <p><u>Probe:</u></p> <ul style="list-style-type: none"> a. For what period of time do you refill drugs or renew prescriptions? (if applicable)
<p>5. How did you assess the quality of life for the patient?</p> <p><u>Probe:</u></p> <ul style="list-style-type: none"> a. How did you discuss disease progression with the client (including end-of-life or depopulation, if appropriate)?
<p>6. 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?</p> <p><u>Probes:</u></p> <ul style="list-style-type: none"> a. Did you look up new information to provide a solution to the presenting problem? b. How could this new learning influence future management of patients presenting with similar conditions? c. Did you have to consult with anyone to manage this case? If yes, how did you approach this?
<p>7. 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?</p>
<p>8. How did you have conversations of finances with this client (i.e. short-term costs)?</p> <p><u>Probe:</u></p> <ul style="list-style-type: none"> a. How did you communicate the expected cost of managing a condition to the client (i.e. long-term costs)?
<p>9. How did you communicate complications to this client? (e.g. unexpected death, errors, unexpected surgical findings, adverse pharmaceutical events)</p>
<p>10. Was any component of the treatment delegated? If so, what was delegated and what was the process used for this delegation?</p>

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 (Transfer of Medical Records)</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?
6.	<u>Insurance</u> How do you collect information that is going to go to an insurance company?
7.	<u>Reporting Diseases</u> Of the cases submitted, were you required to report any diseases?

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