

University of Toronto Medical Record Keeping Workshop

CPSO Assessor Conference

April 11, 2016

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UNIVERSITY OF TORONTO
FACULTY OF MEDICINE
Continuing Professional Development

Faculty / Presenter Disclosure

✦ Faculty:

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Course Co-Director

Attending Physician, Veterans Centre

Sunnybrook Health Sciences Centre

Lecturer University of Toronto

✦ Relationships with commercial interests:

- NONE

Disclosure of Commercial Support

- ✦ This program has received no commercial support.
- ✦ Potential for conflict(s) of interest: none

Mitigating Potential Bias

✦ Not applicable.

Learning Objectives

After participating in this session, assessors will be better able to:

- ✦ Describe the multiple modules and practice exercises included in the University of Toronto Medical Record Keeping workshop.
- ✦ Explain how the CPSO Record Keeping policy, and updates to policy, impact the U of T Medical Record Keeping workshop.
- ✦ Appropriately recommend the U of T Medical Record Keeping workshop to physicians who are interested in improving their record keeping.

Multiple Educational Interventions

- ✦ Preparatory work.
- ✦ 6 hour workshop with
outcome
measurement
exercises
- ✦ Practice applications
 - At 4 weeks
 - At 8 weeks

Preparatory Work

- ✦ Review CPSO Policy Statement #4-12 Medical Records
 1. Case Scenarios on Quality, Continuity, Assessment, and Evidence of care
 2. Describe your Practice
 3. Audit your Medical Records

Workshop Agenda

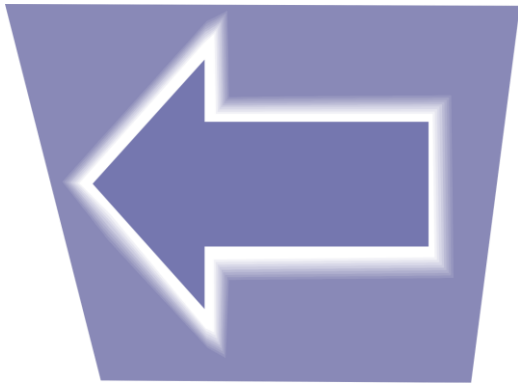
1. Welcome & Introduction
2. Good Medical Records
3. Electronic Medical Records

Lunch

4. Tools for Practice
5. More Practice Tools
6. Application to Practice

Active Learning: Flag and Tag

*Flag page 3 of
the CPSO Policy
Statement.*



Active Learning: Peer Assessment of Medical Records

Using the worksheet provided, assess the sample medical record.

Advantages of EMR

- ✦ Safe & efficient prescribing.
- ✦ Patient education.
- ✦ Managing contacts.
- ✦ Messages & reminders.
- ✦ Scheduling.
- ✦ Forms.
- ✦ Flow sheets.
- ✦ Transferring records.

Tools for Practice



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Peer Assessment of Consultation Request

Using the worksheet provided, assess the sample consultation request.

Flow Sheets

Appendix F of CPSO Policy:

- ✦ Adult Asthma
- ✦ Adult Preventive Care
- ✦ Cancer Management
- ✦ Cardiovascular Disease
- ✦ Chronic Kidney Disease
- ✦ COPD
- ✦ Cognitive Impairment in the Elderly
- ✦ Depression
- ✦ Diabetes
- ✦ Diabetic Ketoacidosis
- ✦ Hypertension

Other:

- ✦ Smoking cessation
- ✦ Opioid Management
- ✦ Well Baby
- ✦ Pre-natal

... etc. ...

Counselling

- ✦ Subject
- ✦ Scope
 - Educational components
 - Management options
 - Prognosis
- ✦ Patient's response
- ✦ Prescribed therapy (if any)
- ✦ Action plan/goal
 - Including follow-up
- ✦ Start & stop times to the minute.

Application to Practice



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Exercise #1: Adapt Practice Tools

Select three medical record-keeping tools relevant to your practice:

- ✦ Cumulative Patient Profile
- ✦ Clinical Notes (SOAP)
- ✦ Consultation Request
- ✦ Flow Sheets
- ✦ Counselling Session Notes

- ✦ Consultants' Records
 - In hospital
 - Follow-up visit
 - Operative notes
 - Diagnostic/Interventional Procedures
- ✦ Consultation Report
- ✦ Consultation Follow-up Report
- ✦ Discharge Summary
- ✦ Psychotherapy Progress Notes

Exercise #1: Adapt Practice Tools

- ✦ Adapt these three tools to the reality of your own practice.

Exercise #2: Medical Records Self-Assessment

- ✦ Assess your own medical records according to the criteria in the CPSO policy.

Exercise #2: Medical Records Self-Assessment

Using the form provided,
indicate for each criterion:

- ✦ Always done.
- ✦ Have improved since the workshop.
- ✦ Needs improvement – high priority.
- ✦ Needs improvement – low priority.
- ✦ Not applicable.

Summary of Registration

June 2012-June 2015:

Total Registrants: 677

Family Physicians: 509

Specialists:

- Psychiatrists

- Emergency Physicians

- Surgeons

- Internal Medicine

- etc

Geographic Distribution

✦ Ontario: 607

✦ Other Provinces:

- 6-12 PARTIPANTS

✦ International:

- For example- US, India

Outcome Measures

✦ Family Physicians:

- 89% MainPro C
- 11% MainPro 1

✦ Specialists Royal College

- 89% Section 3
- 11% Section 1

Evaluation Summaries

✦ Did the materials/assignments you received in advance help you prepare for this session?

- Case Study Review
- Practice Profile
- Self-audit of Medical Records

95%

Evaluation Summaries: How confident to...?

- ✦ Identify the benefits of keeping good Medical Records for patients, their families, other medical providers, and yourself? **6.3/7**
- ✦ Define the requirements of complete Medical Records, and apply the tools to maintain them? **6.3/7**
- ✦ Evaluate the relevance and impact of electronic medical records to your practice? **6/7 with 20% NA**
- ✦ Assess and improve your own Medical Records in practice? **6.4/7**

Evaluation Summaries: CanMEDS Roles

- ✦ Communicator
- ✦ Professional
- ✦ Collaborator
- ✦ Manager/Leader
- ✦ Health Advocate
- ✦ Medical Expert

Commitments to Change

- ✦ Cumulative Patient Profile
- ✦ Flow sheets
- ✦ Counselling-Psychotherapy
- ✦ SOAP
- ✦ Transition to EMR

Evaluation Summary

✦ How important are these changes to your current or future practice?

6.4/7

Feedback from Workshop Participants

- ✦ Significant number of participants who are confused by their College peer assessment and who identified inconsistencies amongst peer assessors (e.g., between a peer assessors and a reassessment or peer assessor and CPSO policy)

It's up to YOU.

The physician is ultimately responsible for the medical record.

- ✦ Legibility.
- ✦ Accuracy.
- ✦ Completeness.
- ✦ Organization.
- ✦ All other legislative and regulatory requirements.