

Summative Assessment Chart Review Form

Chart: _____ Date of visit: _____

DOB: _____ Gender: _____

Brief summary of this visit:

Scoring guide:

Met	Most elements of the standard for care are evident and deficiencies, if any, are minor.
Partially met	Some elements of the standard for care are lacking, but the likelihood of adverse patient outcomes is low.
Not met	Many elements of the standard for care are lacking or patient outcomes could be adversely affected.

General Scoring Criteria	Met	Partially Met	Not Met	N/A
The presenting complaint is clearly documented (why the patient came in).				
The history is complete, reasonable and accurate, and is clearly documented.				
Where a physical examination was clinically indicated, the findings are documented in a standard fashion.				
Based on the presenting complaint and the history, there are no missing items in the physical exam.				
The working diagnosis is stated.				
A working diagnosis is reasonable.				
Any appropriate differential diagnoses are listed.				

General Scoring Criteria	Met	Partially Met	Not Met	N/A
Diagnostic Imaging, lab tests and/or other investigations are recorded in the chart.				
Investigation of the problem is appropriate.				
Prescribed medications are appropriate and recorded. (e.g., drug name, dose, and duration)				
Medication choices are appropriately monitored and reviewed.				
Non-drug therapies are recorded.				
Any management plan is appropriate and documented, including drug and non-drug therapies, and next steps.				
A clear and concise follow-up plan is documented.				

Case-Specific Scoring Criteria	Met	Partially Met	Not Met	N/A
Age-appropriate preventative strategies are documented (e.g., screening, weight control, immunizations)				
Pediatric monitoring is documented on an appropriate pediatric form (e.g., immunizations, growth monitoring and developmental milestones)				
Antenatal monitoring is appropriately documented on the Alberta pre-natal/antenatal				
Psychosocial: Appropriate assessment was done for risk of suicide or self-harm.				
Depression and/or anxiety: Appropriate assessment was done to establish diagnosis and severity.				
Chronic disease: Management follows standard guidelines and protocols.				

Select the statement that best describes this patient’s care:

Both clinical performance and documentation were good/adequate.	
Both clinical performance and documentation were inadequate/lacking. Please explain in the space provided below.	
Clinical performance was good/adequate, but documentation was insufficient/lacking. Please explain in the space provided below, with rationale for assessing adequate clinical performance.	
Documentation was good/adequate, but clinical performance was inadequate/lacking. Please explain in the space provided below.	

If you have any concerns about the candidate’s chart documentation or clinical performance, please explain: