

Chart Stimulated Recall Form

Schedule approximately 2 hours to meet with the candidate and discuss 10 of the 30 charts you selected from the chart review. The 10 charts you choose should preferably be the charts you had some concerns about during your chart review. **Document your discussion using a new form for each chart.**

Chart #: _____

Brief summary of the patient's visit or presenting complaint
(purpose of the visit):

Describe any remaining concerns you have following your discussion with the candidate about this chart. This may include the candidate's clinical reasoning for this patient, and/or their decision-making skills:

Not sure what to discuss with the candidate about this chart?

Here are some prompts:

- Please tell me about this patient’s visit: Outline your approach to the presenting complaint and highlight the key points.
- What specific features led to your diagnosis or clinical impression? Were there any other conditions you ruled out?
- What specific features led you to manage this patient’s complaint as you did? Were there other treatment options you thought about, deferred or ruled out?
- I note you ordered “xyz” medication; what factors influenced your choice? Did you consider any other medications?
- Was there anything special about this patient that influenced your management of this case? (A candidate might note the patient’s psychosocial issues, compliance, past medical history, current medication, support systems, employment, etc.)
- Is there anything about your practice setting that influenced your management of this case? (A candidate might reference a nurse educator, lack of access to a laboratory or x-ray, etc.)
- Was there any decision about follow-up? What were the factors that influenced your decision?
- What do you do when faced with clinical situations or questions you cannot immediately address?
- Did you provide the patient with any resources about their diagnosis? What patient resources do you use and how are they provided? (Handout sheets/pamphlets, recommended links on practice website, etc.)