

## 5. CHART STIMULATED RECALL (CSR)

Unlike simple chart review that focuses on how well the learner has completed the task of chart notation, this process uses the chart to discuss patient cases after the fact. You use this technique with a resident who is performing quite well independently.

### **The Process of CSR**

1. Case selection can be random or selected by resident or preceptor
2. Preceptor reviews the chart note
3. Preceptor guides resident to reveal thought processes during the clinical encounter
4. A CSR worksheet with sample questions & space for recording comments is valuable

### **Look for the following issues:**

#### **Premature diagnostic closure**

- What features of the patient's presentation led you to your top three diagnoses?
- Is there anything else you wish you would have asked?

#### **Inappropriate management choices**

- Were there other tests that you thought of but deferred or ruled out?
- What did you decide was appropriate for follow up?

#### **Patient – centeredness**

- What did you learn about the patient's concerns about the illness?
- Do you feel you reached common ground with the patient?

#### **Comprehensive care skills**

- Did you discuss any preventive interventions, such as quitting smoking, with the patient?

Video: Description & example of Chart Stimulated Recall

Article: Structured teaching & assessment, Shirley Schipper & Shelley Ross