

O F F I C I A L P U B L I C A T I O N

G U I D E L I N E S

Documentation of Pharmacists' Activities in the Health Record: Guidelines

Appendix B: Sample Tool to Evaluate Pharmacist's Skills for Documentation in the Health Record

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Canadian Society of Hospital Pharmacists
Société canadienne des pharmaciens d'hôpitaux

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Appendix B: Sample tool to evaluate pharmacist’s skills for documentation in the health record

This tool lists the core elements and attributes of documentation. It can be used to help educate the learner and to assess the application of learned information regarding documentation of a pharmacist’s actions. Pharmacists could also use the tool to routinely self-assess their skills and initiate steps to address any areas that require improvement.

The person conducting the assessment could use this tool to review a pharmacist’s documentation for patients currently under his or her care. Alternatively, the tool could be used to assess documentation skills over a longer period of time (e.g., 3 months). In the latter case, the hospital’s health records department would require a formal request for the specified charts, if the health records are not created, stored, and accessed electronically.

Core elements

Element	Comments
<input type="checkbox"/> Date and time that documentation is occurring	
<input type="checkbox"/> Date and time of the encounter with the patient (if not the same as when documentation is occurring)	
<input type="checkbox"/> Reason for the encounter	
<input type="checkbox"/> Any relevant subjective and objective information	
<input type="checkbox"/> Source of the information	
<input type="checkbox"/> Patient’s consent (or denial of consent) for the pharmacist to contact a person outside the patient’s circle of care to either obtain or disclose information about the patient	
<input type="checkbox"/> The pharmacist’s assessment of the information	
<input type="checkbox"/> The patient care that has been planned and provided, including drug therapy problems identified	
<input type="checkbox"/> Factors that informed the pharmacist’s conclusions, decisions, and intentions	
<input type="checkbox"/> Evidence that the pharmacist has executed his or her professional responsibilities according to the standards of care	
<input type="checkbox"/> Communication with others within and outside the patient’s circle of care, as relevant and	

Element	Comments
necessary	
<input type="checkbox"/> Identity and contact information] of the pharmacist recording the entry	

Elements of care provided

Element of care	Comments
Medication history	
Indication for each drug taken (or prescribed)	
Reason that drug treatment was stopped (if relevant)	
Patient's experience with medication, including concerns, complaints, allergies, and other drug therapy problems	
Pharmacist's assessment	
Rationale for conclusions drawn, action plans, or recommendations made	
Pharmacist's plans	
Decision(s) or recommendation(s) for changes in drug selection, dosage, duration of therapy, and route of administration	
Expected patient outcome(s)	
Decision(s) or recommendation(s) for monitoring drug therapy, including identification of suitable clinical or laboratory tests and their frequency, results, and interpretation	
Pharmacist's actions	
Description of the activities performed (e.g., educating the patient about how to take a medicine or documenting that the patient's medication therapy was reviewed and that no changes are recommended)	

Element of care	Comments
Description of follow-up to be conducted by the pharmacist or another caregiver	
Communication with other healthcare professionals, the patient, or family (when relevant)	
Names of persons (and their respective professional designations) with whom the pharmacist is collaborating to implement the care plan and what parts of the care plan those persons will be implementing (or should be implementing)	

Attributes of the documentation

Element	Comments
<input type="checkbox"/> Complied with privacy legislation	
<input type="checkbox"/> Complied with professional standards	
<input type="checkbox"/> Complied with organizational and departmental policies and procedures	
<input type="checkbox"/> Content is accurate	
<input type="checkbox"/> Content is clear	
<input type="checkbox"/> Content is concise	
<input type="checkbox"/> Written in a diplomatic tone	
<input type="checkbox"/> Written in plain language (when suitable)	
<input type="checkbox"/> Focuses on the patient	
<input type="checkbox"/> Content is relevant	
<input type="checkbox"/> Created in a timely manner	

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