Family Engagement Quality Improvement Project
Medical Record Review Tool

Patient/Family Concerns
1. Is there documentation in the medical record indicating that patient/family concerns were elicited at the most recent visit? (Skip pattern: If yes, continue to Question 2. If No, skip to Question 3)
   - YES
   - NO

2. Is there documentation in the medical record indicating patient/family concerns were addressed at the most recent visit or a plan to address the concerns was made?
   - YES
   - NO

Family Strengths
3. Is there documentation in the medical record indicating that family strengths were identified and discussed during the most recent visit?
   - YES
   - NO

Post-visit Medical Summary and/or Care Plan
4. Is there documentation in the medical record indicating that a post-visit medical summary or a comprehensive care plan was created or updated/maintained during a recent visit? (Skip pattern: If yes, continue to Question 5. If No, skip to Question 6)
   - YES
   - NO

5. Is there documentation in the medical record indicating that a post-visit medical summary or comprehensive care plan was reviewed through an active form of family engagement and offered to the patient/family during a recent visit?
   - YES
   - NO

Communication of Age-Appropriate Screening Results
6. Is there documentation in the medical record that age-appropriate screening results were discussed with the family on the same day as the visit?
   - YES
   - NO