

HKCFP Exit Examination

Practice Assessment

Pre-Exit Review of Medical Records

(PERM)

General Information

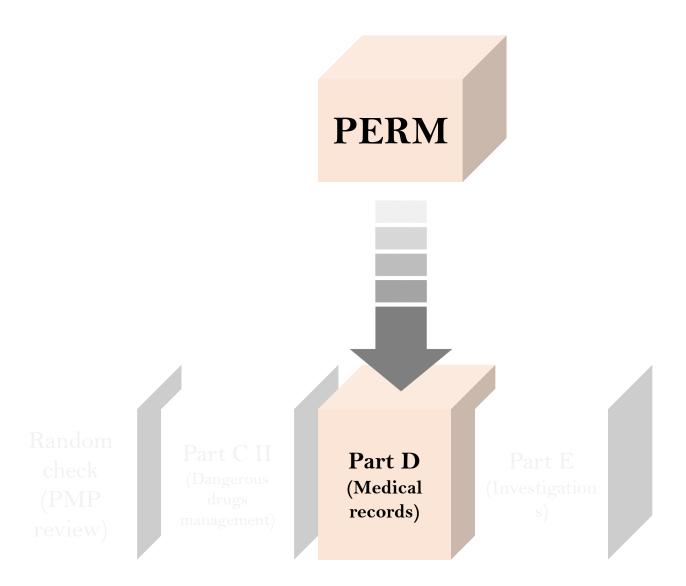
Practice Assessment consists of 4 Parts

Random check (PMP review)

Part C II
(Dangerous
drugs
management)

Part D (Medical records)

Part E (Investigations)



PERM: pre-exit review of medical records

Pre-Exit Review of Medical Records (PERM)

Candidate preparation

The Assessment

PERM and Exit Examination

What to prepare What will be assessed

Tips on Good practice

Consensus on marking

Candidate preparation

- 100 medical records
- 100-case log

1. Collect medical records of 100 different patients

that consulted you in a six-week period

between 1st May to 31st August 2023

Exclude:

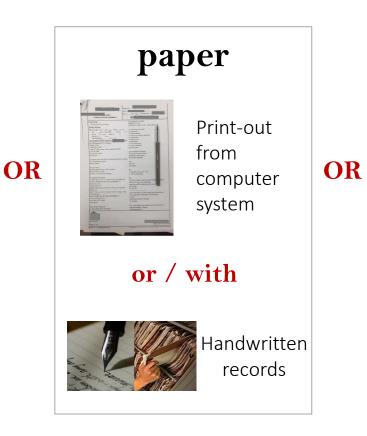
Medical examination, health assessment / screening

For example: the 100 Cases are collected between

- 1 May to 11 June 2023; or
- 19 June to 30 July 2023; or
- 21 July to 31 August 2023, etc.

2. The **format** of medical records in **PERM** can be:





A hybrid of both

However, please note

The format of medical records in Exit Exam (PA):

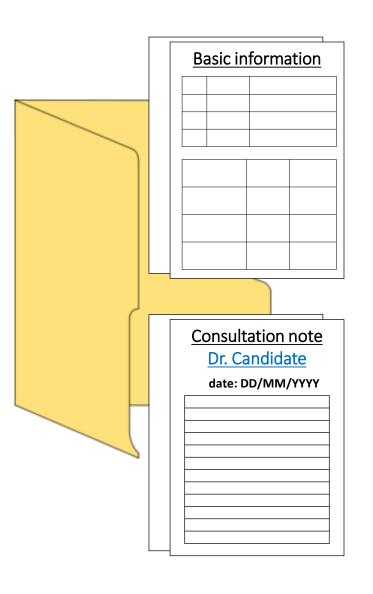


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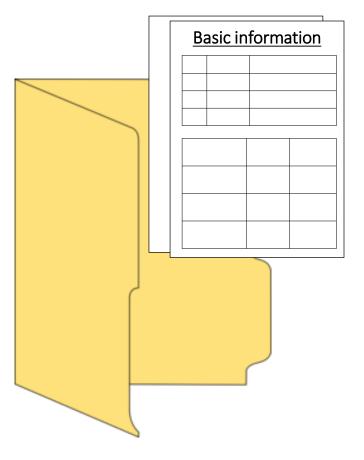
Readily retrievable and available upon Assessor's request

3. The content of each medical record for assessment should at least include:



i. Basic information

ii. Consultation notes



i. Basic information

On following areas

as appropriate and as applicable

- Allergy / Adverse drug reactions
- Current medication list
- Problem list (Current / Past health)
- Family history (with genogram as appropriate)
- Social history, occupation
- Height, weight, BMI/ growth chart, blood pressure
- Immunization
- Tobacco & alcohol use; physical activity

Please note:

It is not mandatory to have full documentation on all the areas in every record

ii. Consultation notes

On following areas

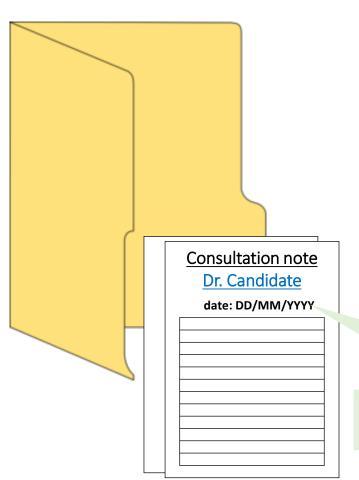
as appropriate and as applicable

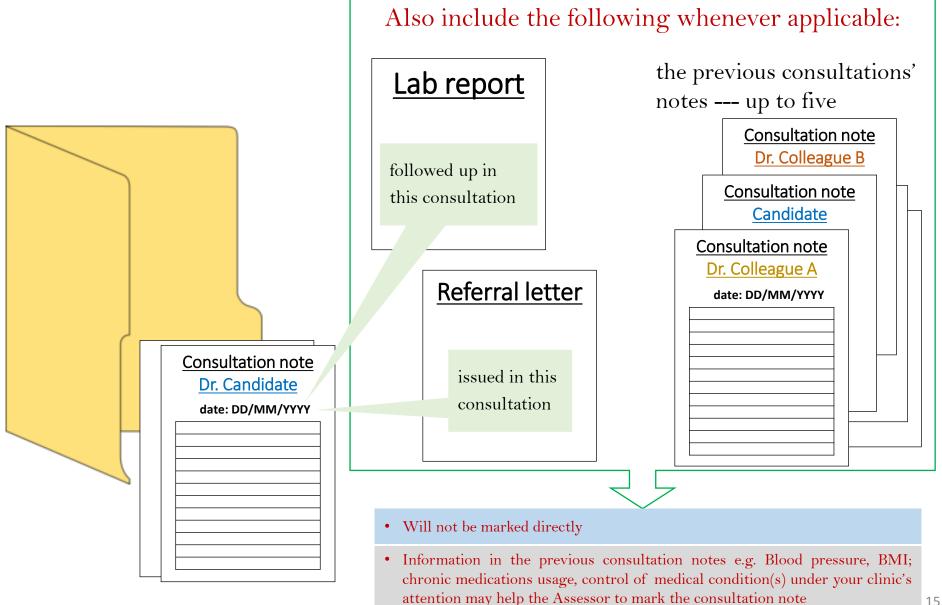
- Main reason(s) of consultation
- Clinical findings
- Diagnosis / working diagnosis
- Management
- Anticipatory care advice

Please note:

- As appropriate and as applicable
- Not mandatory in every consultation

Date of the consultation: to be stated in the 100-case log





100-Case Log (template)

A. Template for 100-Case Log

Serial	Patient record	Patient	sex	age	diagnosis	Date of the	Date of first	
no.	number	initials	Jex		consultation	attended		
	Trainiber	miciais				Consultation	the clinic	
1							the chine	
1								
2								
-								
3								

Updated 3 October 2021 3

100-Case Log

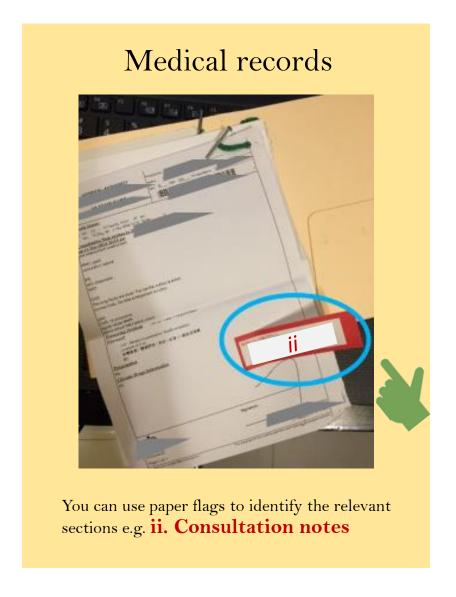
Table summary of the collected case in a standard format

Serial no.	Patient record number	Patient initials	sex	age	diagnosis	Date of the consultation	Date of first attended the clinic
1	3216	NFK	F	25	URTI	20 May 2022	18 OCT 2010
2	8839	LKF	F	46	DEPRESSION	20 May 2022	25 JUL 2011
3	292	KPW	М	87	DM, HT, HYPERLIPIDEMIA	21 May 2022	18 SEP 1999
	If the assesso		e	1	URTI	This consulta	
5	to assess this	record 		12	ALLERGIC RHINITIS	assessment	
6	4454	CHC	М	67	HT	21 May 2022	12 JAN 2011
100	2323	LKH	М	38	URTI	29 June 2022	24 OCT 2011
	·						

Confidentiality: Do not include patient's name, HKID

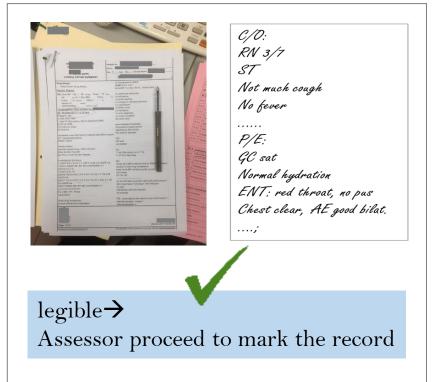
Suggestions on presenting PERM materials to assessor

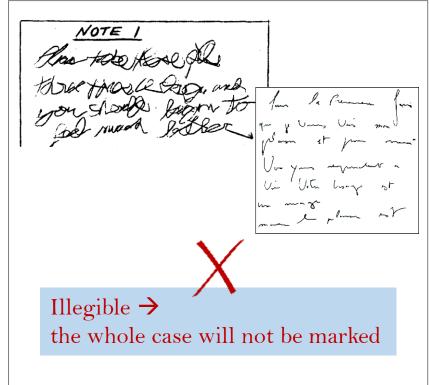
100-Case Log 11/9/2001 12/9/2011 9/11/2011 LPH 56 34 DMLHT, high spid, CHI (S TLP # 17 GERD, Heplantin 450318 164/2013 ASCREE. SES SYE M BI URS 55000 5.5/2018 MR YYC F 88 URL aphrhous slore 55000 5/19/2001 25 CKT M 61 H7 WIRLVILAR 29/2/2004 OT LTW M SH HT 159/2011 THE LIGHT T 77 HIT, high light 3/5/2008 26/2/2003 HT NLW F 64. High lipid 2/5/2018 PS YCP F SI HT WIN WC, IPO 3/5/2014 513(201) MIL CREE M 74 HT. HPSL Spin, IFG 3/5/2018 21/4/2004 840 CKM F 64 HT WINLYH AF LHY M 82 HT, IFO, high light 3/50/2001 NO LYK # 48 HT, bordering Til, obesity 2511(20)4 SET HITS M. 17 DML high light HT. AR. 1992000 SU APV F SS UND 2610/2001 UN TYY F 60 URLOAKSE 392008

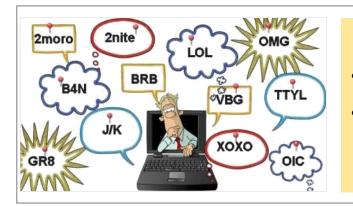


Areas to be assessed

0. Legibility







Use abbreviations sensibly

- Understood by most general practitioners
- Can prepare a 'reference list of abbreviations' for Assessor; but acceptance subject to the Assessor's judgment

i. Basic information

- Allergy / Adverse drug reactions
- Current medication list
- Problem list (Current / Past health)
- Family history (with genogram as appropriate)
- Social history, occupation
- Height, weight, BMI/ growth chart, blood pressure
- Immunization
- Tobacco & alcohol use; physical activity
- As appropriate
- As applicable
- Dated
- Updated
- Consistent with other parts of the medical record

refers to the regular medications from your clinic

Genogram: not mandatory in every case

Please note:

It is not mandatory to have full documentation on all the areas in every medical record

i. Basic information

Use of templates / tables

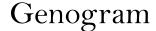


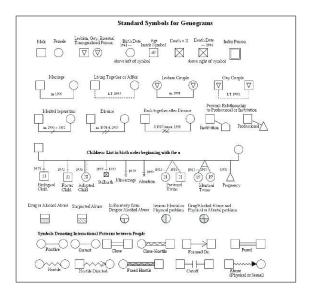
Basic information									

- Preferred
- Should have significant 'negatives' e.g. Allergy: nil known

- As appropriate and as applicable
- Not mandatory to full in all the blanks on the template in every medical record
- Inappropriate 'blanks' on the template/ table may be regard as missing information

i. Basic information





- At least (but not limited to) 2 generations
- Relevant & specific for the patient
- Show index patient
- Family members' health condition if deceased: cause & age of death
- Show members who are living together

No genogram in some cases could be acceptable, e.g.

- Communication difficulty (e.g. impaired cognition, hearing, speech, language barrier)
- Lack of appropriate informants
- Medical emergency encountered

• Main reason(s) of consultation

- State **clearly in the initial part** of the consultation notes; e.g.
 - FU DM, HT, hypothyroidism
 - *C/O: runny nose 2/7*
- Avoid preceded by irrelevant past information; the main reason(s) of the consultation would not sink into the paragraphs of notes causing confusion / misunderstanding
- Keep any 'introductory information' e.g. significant past / current medical information concise and relevant

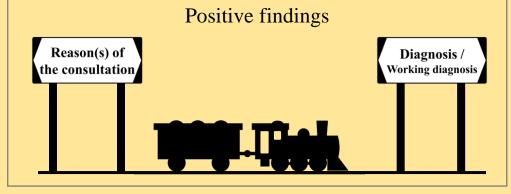
Clinical findings

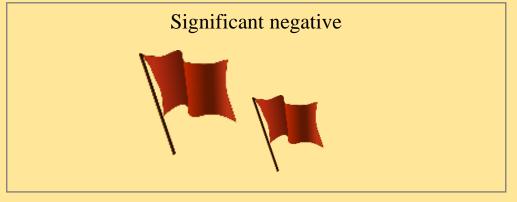
• **Group the findings** under headings e.g. history, physical exam, diagnosis / impression, management, anticipatory care (AA) etc.

C/OFU DM, HT Runny nose 1/7 Good compliance to Rx **Tolerated** Watery, Mild ST. No hypoglycemia Diet: usual care; but avoiding sweety Not much cough No fever *fatty foods* TOCC -ve Ex: nil regularly PE: PE: GC sat GC sat BP *Temp:* Hydration N Hstix 2hr pp Mx: Mx: AA: Discussed DEXA, patient not keen at present

• Clinical findings

• Record **positive** and **significant negative** clinical findings





Clinical findings

Follow up significant issue(s) raised in previous visits as appropriate
 e.g. overweight, smoking, elevated blood pressure

- ICE (idea / concern / expectation), Elaborated psycho-social history:
 - may not be necessary in straightforward episodic physical/ chronic follow up cases
 - o important in certain situations e.g.
 - Psychological condition; e.g. insomnia, depression follow up
 - Diagnostic or management challenge e.g.
 - occurrence of a potentially sinister condition (e.g. suspected malignancy)
 - * suboptimal chronic disease control
 - distressed patient / relatives
 - Volunteered by the patient / relatives

Diagnosis / working diagnosis

Must be stated in the consultation note

- For straightforward episodic / regular follow up cases: state the diagnosis usually sufficient
- Status of control in chronic disease e.g.
 - o HT, stable
 - o DM suboptimal control
 - o lipids on statin, at target (< 2.6)
- 'Triple diagnosis': psycho-social status as appropriate; e.g.
 - Dementia, care-taker (wife) stress
 - Depression, recently employed
- In case cannot arrive at a diagnosis, give differential diagnoses (ddx) / working diagnosis / clinical impression:
 - o Dizziness; ddx: BPPV, vestibulitis
 - Weight loss: bowel pathology?, hyperthyroid
 - LUTS: BPH, Co-existing UTI?

Exhaustive list of ddxs is not necessary

Management

- Drug use or/ and nonpharmacological measures:
- Injudicious use of drugs e.g. inappropriate use of steroids, hypnotics, will be penalized

RAPRIOP

If follow up is required:

- 'planned': the interval should be appropriate to the nature of problem(s) to be reviewed
- 'FU p.r.n.', 'open FU': give appropriate advice e.g.
 'return / seek medical attention if':

 the tongue ulcer not improve in the next 2 weeks

 rash / vesicles develop on the region you feel the pain

Referral

If you expect the patient should be seen by a designated specialist with high priority / urgent basis, consider:

- follow up / contact the patient for confirmation
- remind patient such as return / contact clinic if not seen by Breast Clinic within three weeks

Anticipatory care advice

- Anticipatory care advice (AA) is contemplated in:
 - o straightforward episodic encounter,
 - o stable regular follow up chronic medical condition
- AA may not be essential in certain situations, e.g. prolonged consultations due to
 - o Patient raised multiple issues
 - o Presence of sophisticated psycho-social issues
 - O Diagnostic difficulties
 - Management difficulties
- One AA advice in one consultation should be sufficient
- Age and gender appropriate
- Document patient's response to the AA, e.g.
 - Discussed bone density & DEXA; patient not keen, cost concern
 - o Flu-shot today at clinic
 - o PAP smear: due next year in FPA

The Assessment

- Choose ten medical records from the 100-case log
- Mark the ten records
- Feedback to the candidate

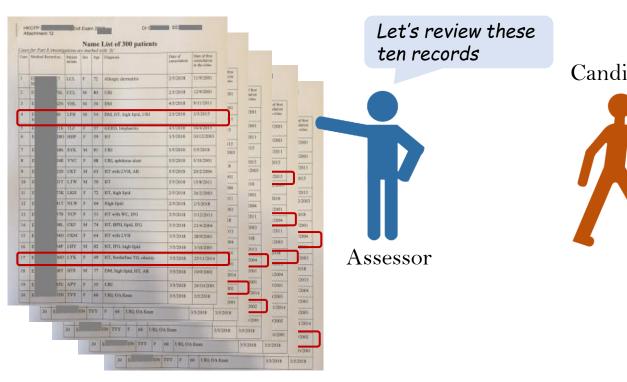
Who can be PERM Assessor?

Candidate's Clinical Supervisor in Higher FM Training

OR

PA Examiner

Choose ten medical records from the 100-case log







AND /OR



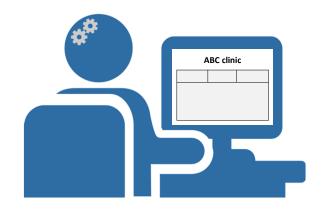
Explain the layout of the medical records to Assessor

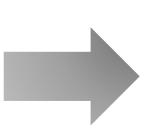


Assessor marks the ten medical records



AND /OR





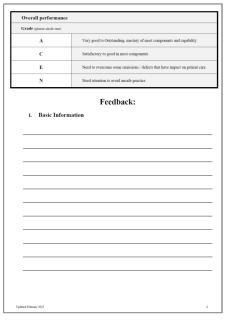


PERM Assessment Form

PERM Assessment Form

The Hong	Kong College of Family Physician 香港家庭醫學學院							
H KCFP								
	Medical Record Review (PERM)							
Pre-Exit	Medical Record Review (PERM)							
	Medical Record Review (PERM)							
Candidate Practice name &	Medical Record Review (PERM) (Working in the practice since							
Candidate Practice name &								
Candidate Practice name & address								
Candidate Practice name & address Assessor								
Candidate Practice name & address Assessor Date of assessment								





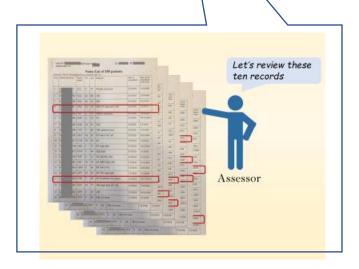
	Consultation notes
_	
Ove	erall / other comments

Overall performance on Basic Information: area(s) need attention / improvement	If applicable, please "; higher priority "", etc.	remarks
Insufficient positive / significant negative information		
Inaccurate / inconsistent with other part(s) of the record.		
Information not updated		
Documentation: length not appropriate OR unclear		
Others:		
Overall performance on Consultation Notes: area(s) need attention / improvement	If applicable, plane *. higher pencity **, etc.	remark
Main reason(s) of consultation unclear		
Insufficient documentation of clinical findings		
Diagnosis/ Working diagnosis unclear		
Suboptimal management		
Lack of / inappropriate anticipatory care advice		
Documentation: length not appropriate OR unclear		
Others:		
Assessor please sign on the fro	nt page	

Enter the serial no.

Enter the serial numbers of the ten records chosen

Enter the serial number of the records (i.e., $1-100$) chosen from the 100-Case $\log \rightarrow$		2	3	4	5	6	7	8	9	10
		26	35	41	51	63	72	78	84	100
0. Legibility										



Legibility

PERM Assessment Form

Enter the serial number of the	1	2	3	4	5	6	7	8	9	10
records (i.e., $1 - 100$) chosen from the 100 -Case log \rightarrow	9	26	35	41	51	63	72	78	84	100
0. Legibility	V	√	V	√	√	V	V	V	√	X

Check legibility of each records

legible→
Assessor proceed to mark the record

Illegible →
the whole case
would not be marked

Enter the serial number of the	1	2	3	4	5	6	7	8	9	10
records (i.e., $1 - 100$) chosen from the 100-Case log \rightarrow	9	26	35	41	51	63	72	78	84	100

i. Basic Information	 Allergy / Adverse drug reactions Current medication list Problem list (Current / Past health) Family history (with genogram as appropriate) Social history, occupation Height, weight, BMI/ growth chart; blood pressure Immunization Tobacco & alcohol use; physical activity 							
Grade (please circle one)								
A	Very good to Outstanding, mastery of most components and capability							
C	Satisfactory to good in most components							
E	Need to overcome some omissions / defects that have impact on patient care							
N	Need attention to avoid unsafe practice							

Enter the serial number of the records (i.e., 1 – 100) chosen	1	2	3	4	5	6	7	8	9	10		
from the 100-Case log →	9	26	35	41	51	63	72	78	84	100		
<u> </u>		_										
i. Basic Information		Г										
	CurProFan	Allergy / Adverse drug reactions Current medication list Problem list (Current / Past health) Family history (with genogram as appropriate)					 Social history, occupation Height, weight, BMI/ growth chart; blood pressure Immunization Tobacco & alcohol use; physical 					
 Assess the basic information of each record Use the grid to jot notes or the key 						activ	vity					

impression

Enter the serial number of the	1	2	3	4	5	6	7	8	9	10
records (i.e., $1 - 100$) chosen from the 100-Case log \rightarrow	9	26	35	41	51	63	72	78	84	100

i. Basic Information	✓	No growth chart					
	Allergy / Adverse drug reactions	 Social history, occupation 					
	Current medication list	• Height, weight, BMI/ growth chart;					
	• Problem list (Current / Past health)	blood pressure					
	Family history (with genogram as	 Immunization 					
	appropriate)	• Tobacco & alcohol use; physical					
		activity					

- No rules in using the grid
- Help to recall when drafting feedback and grading the global performance
- May use other symbols preferred by assessor e.g. ++ , + , +/- , etc.

Enter the serial number of the	1	2	3	4	5	6	7	8	9	10
records (i.e., $1 - 100$) chosen from the 100-Case log \rightarrow	9	26	35	41	51	63	72	78	84	100

i. Basic Information	//	/	X	/	/	/	//	X	No growth chart	/
	• Curre	 Allergy / Adverse drug reactions Current medication list Social history, occupation Height, weight, BMI/ growth characteristics 								
Grade the global performance	• Famil	 Problem list (Current / Past health) Family history (with genogram as Immunization 								
	appropriate) • Tobacco & alcohol use; physical activity									1
Grade (please circle one)										
A	Ver	y good t	o Outstan	ding, mas	stery of n	nost comp	onents an	d capabil	ity	
C	Satisfactory to good in most components									
E	Need to overcome some omissions / defects that have impact on patient care									
N	Need attention to avoid unsafe practice									

Comparison of PERM Grading and PA rating

	Grading in PERM	Rat	ting in Part D, PA / Exit Exam
	Very good to Outstanding, mastery	8.5 or above	Consistently demonstrates outstanding performance in all components; criterion performance. (outstanding)
	of most components and capability	8	Consistently demonstrates mastery of most
		7.5	components and capability in all. (Very Good)
	Satisfactory to good in most	7	Consistently demonstrates capability in most components to a professional standard. (Average to
	components	6.5	good) (minor omissions / defects that can be tolerated)
		6	Demonstrates capability in some components to a satisfactory standard; but with omissions and/or
E	Need to overcome some omissions / defects that have impact on patient	5.5	defects in other components that have impact on patient care. (such omissions/ defects were seen in two or more of the Cases assessed)
	care	5	Demonstrates inadequacies in several components
		4.5	with major omissions or defects.
N	Need attention to avoid unsafe practice	4 or below	Demonstrates serious defects; clearly unacceptable standard overall.

Consultation Notes

Enter the serial number of the records (i.e., 1 – 100) chosen from the 100-Case log →	1	2	3 3 5	4 41	5 5 1	6	7 72	8	9	10 100
	Ш	<u> </u>								
ii. Consultation not	S									
		$oxed{}$	1		1	.	1	1	I	
Main reason(s) of consultation		**		• • • •						
Clinical findings	//	Use	e the gi	rıd to j 	ot the l	key imp 	ression 	of eac	ch case	
Diagnosis/ Working diagnosis		e.g.	r good	nerfor	mance:	//				
Management	X	• fo	r satisf	actory	perfori	mance:				
Anticipatory care advice		• fo	r issues	s with		s: 🔨 concern	ıs: X			
		• N	ot appl	icable:	NA					

Consultation Notes

ii. Consultation note	es									
Main reason(s) of consultation				/		/				
Clinical findings	//			//	/	/	//		/	X
Diagnosis/ Working diagnosis			X					/		
Management	X				X				//	
Anticipatory care advice		NA								NA
Grade (please circle one)	Grade	the glo	obal per	rformar	nce					
A	Ve	ery good	to Outstar	nding, ma	stery of m	nost comp	onents an	ıd capabil	ity	
C Satisfactory to good in most components										
E	Need to overcome some omissions / defects that have impact on patient care									
N	Need attention to avoid unsafe practice									

Overall performance

Overall performance	
Grade (please circle one)	
\mathbf{A}	Very good to Outstanding, mastery of most components and capability
С	Satisfactory to good in most components
E	Need to overcome some omissions / defects that have impact on patient care
N	Need attention to avoid unsafe practice

Please note

if any part(s) of PERM graded "N"

Grade (please circle one)	
\mathbf{A}	Very good to Outstanding, mastery of most components and capability
C	Satisfactory to good in most components
E	Need to overcome some omissions / defects that have impact on patient care
N	Need attention to avoid unsafe practice

The PERM Report will be rejected by Specialty Board

Feedback to the candidate

Comment on

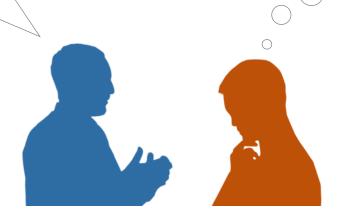
- o Global performance
- Individual cases

The fact you noted

Your opinion as appropriate

Consolidate on:

- Good performance make prioritized changes on:
- Area(s) need improvement
- Area(s) need attention
- Undesirable practice



Preferably to be conducted at earliest convenience after the marking

- Still having fresh memories on the cases
- Allow sufficient time for the candidate to consolidate and change

Feedback to the candidate

Assessor documents the Feedback

Summary of the feedback given to the candidate	ii. Consultation notes
Feedback:	
	Overall / other comments
—— Some examples	
 Case 64: Basic information (HAFM) HT", but in fact patient was HT on Case 100: No growth chart (age 3); is history: non-smoker / drinker 	atenolol ——————————————————————————————————
Updated February 2023 4	

Feedback to the candidate

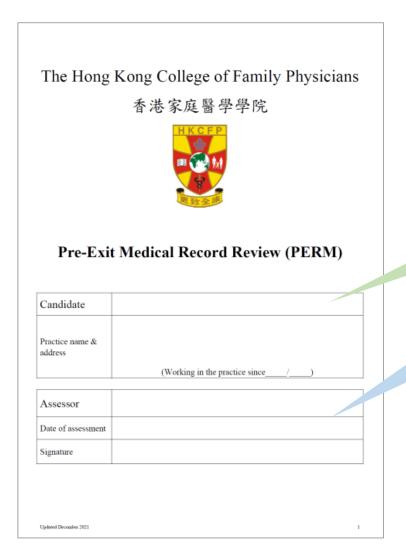
Assessor documents the Feedback

Please tick the area(s) need attention / improvement according to the overall performance:

Overall performance on Basic Information: area(s) need attention / improvement	If applicable, please √; higher priority √√, etc.	remarks
Insufficient positive / significant negative information		
Inaccurate / inconsistent with other part(s) of the record		
Information not updated		
Documentation: length not appropriate OR unclear		
Others:		

Overall performance on Consultation Notes: area(s) need attention / improvement	If applicable, please ✓; higher priority ✓ ✓, etc.	remarks
Main reason(s) of consultation unclear		
Insufficient documentation of clinical findings		
Diagnosis/ Working diagnosis unclear		
Suboptimal management	✓	
Lack of / inappropriate anticipatory care advice		
Documentation: length not appropriate OR unclear		
• Others:		

Completing PERM Report



Candidate's information

Assessor's signature



PERM Report



The ten medical records assessed in PERM must be kept till $31^{\rm st}$ March next year

These records may be reviewed by delegates of Specialty Board for:

- suspected misconduct in PERM when necessary; OR
- quality assurance as agreed by the candidates and assessors

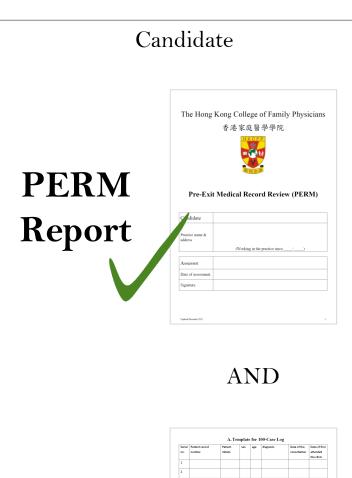
Some observations, comments and recommendations from previous PA (Part D Medical Records)

issue noted	Comments / recommendations
Submitted duplicate cases in the case-log	 To be avoided In Exit Exam: risk of penalty & disqualifications
Housewife; given sick leave for IOD	
Tramadol and pholcodine; both opioid types, risk of respiratory suppression	
F/61 FU for neck pain, numbness UL The consultation notes (done in 9/17) typed: MRI neck (9/17): C3/4; C4/5; C5/6; C6/7 mild spinal stenosis with compressing cordC3/4 mild increase T2 intensity suggestive of early compressive myelopathy. Ortho pending 12/ 2018 should attempt to advance the orthopedic appointment Mx: Referred to Physiotherapy potential unsafe Mx	
HT newly on drug; no regular FU was arranged, instead advised patient to self book IVAS. Also there is a DM RAMP podiatrist appointment for patient in the record, it is not sure if patient in having DM or not.	
"Other allergy" section left blank on the basic information templates	Enter 'nil' , 'nil known'
ENT referral made; but not a single word on ENT symptoms found in the record	
Topical urea cream prescribed; indication not found in record	

issue noted	Comments / recommendations
 Case A - Syncope 2nd time with few months should need further work up rather than just treatment GI symptoms. DDx may include TIA epilepsy Case B - sub-mandibular mass may need further work up. e.g. sputum culture, imaging Overall impression: little attempt to arrive provision dx / ddx; problems are then mostly referred out. Can discuss more with patient and suggest more for options 	
Can consider other DDx in kids with prolonged cough e.g. allergic rhinitis; not followed up	
Genogram: there was no age and health information for those alive; although age and cause of death of the deceased family members are recorded	 In case of time constraint, focus on information of closely blood-related, spouse, living together (i.e. members surrounding the patient). Put down the significant positives, 'in good health', etc.
Patient has ECG; routine care? or ordered for any symptoms? Not documented in history and the referral letter.	
Why 10 year old child epistaxis given neomycin cream?	

issue noted	Comments / recommendations
Fasting Hstix 8.3 – 10.4, A1c 8.5%, hx too brief, better to have more hx on lifestyle and any symptoms of poor DM control. Mx just stepped up metformin from 500 mg BD to 750 mg BD, not likely to bring significant improvement	
No immunization record for child cases	

PERM and Exit Exam



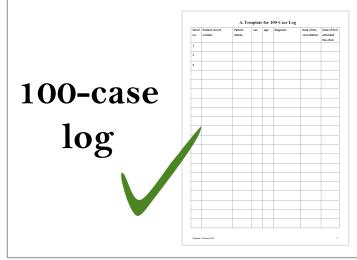
To be submitted with
the Exit Examination Application
(deadline: 1st working day of November)



PERM Report



AND





Part D (Medical Record)

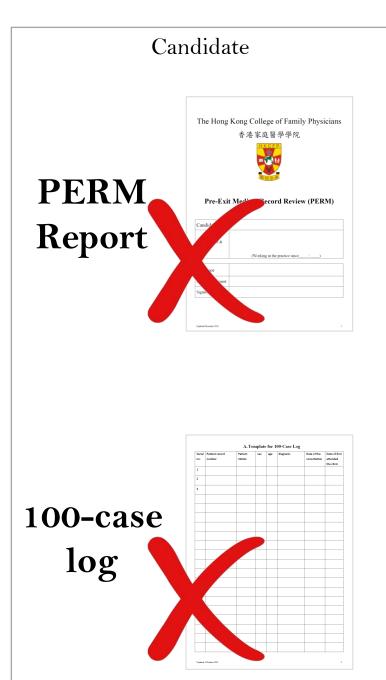
and separately,

10 medical records for

Part E (Investigations)

in the usual six-week case collection period (usually from middle of Sep to end of Oct) for Exit Examination

Please refer to the Pre-Exit Examination Workshop for candidates in August every year



Same as the requirement of 2022 Exit Examination

Collect 300 medical records for

Part D (Medical Record)

in the usual six-week case collection period (usually from middle of Sep to end of Oct) for Exit Examination

As a transitional arrangement; in about 2 years' time PERM will be mandatory

Process of PA

- 1. Prepare for the examination
- 2. Submit required PA Document at Exam Application
- 3. Examiners will visit the candidate on a designated exam date

to conduct PA —which consist of:

Random check (on PMP)

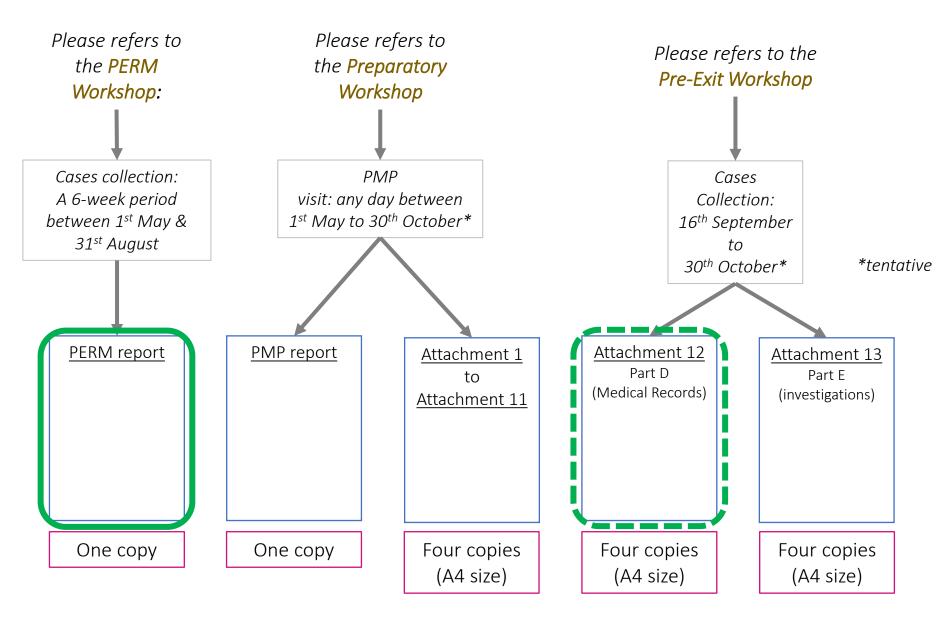
Part CII (Dangerous drugs management)

Part D (Medical records)

Part E (Investigations)

- 4. Results announcement
- 5. Post Examination evaluation

PA Document



Part D: timeline

April	
May	• 100 cases in 6 weeks
June	Pre-Exit Review of Medical Records (PERM) within May – August • Assessor (e.g. Trainer
July	(Session I) • Assessor (e.g. Trainer mark 10 cases • Feedback must be
August	given to candidate
September	Part D Case collection
October	(Session II) • 100 cases in 6 weeks
November	• Otherwise the same as
December	Exit Examination starts current format

Prepaing PA for Exit Examination

PA Important dates 2023 May June 1 May to 31 August **PERM** July **PMP** Report 1 May to 31 Oct, 2023 (tentative) **Attachment** August 1 to 11 September Cases collection Attachment October 16 Sep to 31 Oct, 2023 (tentative) 12, 13 Exam application deadline 1 Nov, 2023 (tentative) November

Exit Examination

PA Important dates 2023 PERM December 1 Dec, 2022 to 31 Jan, 2024 (tentative) 2024 Exit Exam Period A 2024 January February 1 Feb to 31 Mar, 2024 (tentative) 2024 Exit Exam Period B March April TBC Results announcement

Enquiry

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