

Case Management Review Evaluation Rubric

Assessment Item	Emerging (E)	Developing (D)	Competent (C)	Advanced (A)
1. MCO 1.1 - Develop a list of differential diagnosis/es and corresponding exams from a case-appropriate health history and review of external health records.	The student did not develop a list of differential diagnoses or developed an inappropriate list of diagnoses given the patient's history, review of records, and examination (i.e. arthralgia, myalgia and VSC for a patient with an acute injury and radiculopathy symptoms). Requires significant clinician guidance/intervention.	The student developed a list of differential diagnoses that was incomplete and/or incorrect based on the information from the patient's history, review of records and examination. Clinician guidance was required.	The student developed an appropriate list of differential diagnoses for this specific case, taking into account the patient's health history, review of records and examination. Little clinician guidance was required.	The student developed an appropriate list of differential diagnoses for this specific case, taking into account the patient's health history, review of records and examination. No clinician guidance was required.
2. MCO 1.2 - Identify need for follow-up through additional exam, tests and tools, and consultations	The student did not recognize and/or document the need for more than 1 follow-up element, or for 1 follow-up element that was determined to be critical, such as a potential contraindication, emergent health situation, red flag, etc. Requires significant clinician guidance/intervention.	The student did not recognize and/or document the need for 1 follow-up element determined to be less than critical by their supervisor. Requires clinician guidance.	Student identified the need for all follow-ups and documented the specific information or procedures that were needed, or documented that there was no need for follow-up. Little clinician guidance needed.	The student identified the need for all follow-ups and documented the specific information or procedures that were needed without any clinician guidance.
3. MCO 1.3 - Generate a problem list with diagnosis/es.	The student did not generate a problem list and/or did not use appropriate diagnoses for each problem, or the problem list and/or diagnoses was incorrect/inappropriate for the case. Required significant clinician guidance.	The student's problem list for this case was slightly incomplete and/or did not have at least 1 diagnosis or had at least 1 incorrect diagnosis associated with a problem on the list. Required significant clinician guidance.	The student developed an appropriate problem list with diagnoses for this case. Required little clinician guidance.	The student developed an appropriate problem list with diagnoses for this case. The list was complete and the student required no clinician guidance.
4. MCO 2.1 - Develop an evidence-informed management plan appropriate to the diagnosis, including obstacles to improvement, measureable healthcare goals, prognoses and target endpoint of care in consideration of bio-psychosocial factors, natural history and alternatives to care.	The student's recommended management plan does not meet evidence-informed guidelines or expectations for acute or long-term management and/or lacks multiple required elements. Required significant clinician guidance/intervention.	The student's recommended management plan is generally acceptable, however, is lacking at least 1 significant element of an evidence-informed approach (i.e. the patient is in the rehabilitation phase of care but the student did not recommend a specific home exercise plan). Requires clinician guidance.	The student developed an evidence informed management plan based on the current examination's findings. The plan is consistent with the patient's goals, healthcare needs, and guideline recommendations relative to their current phase of care. Little clinician guidance.	The student's management plan is compliant with guideline recommendations and expectations for the patient's phase of care and addresses all goals, self-care and other patient needs without any clinician guidance.

Case Management Review Evaluation Rubric

5. MCO 2.2 - Refer for emergency and/or collaborative care as appropriate	The student did not recognize the need for emergency care and/or a referral for collaborative care. Required significant clinician involvement.	The student recognized a need for emergency and/or collaborative care, however, their timeliness, referral plan, whom to refer the patient to, etc. were inappropriate and required clinician involvement.	The student recognized the need for emergency and/or collaborative care, but required minimal clinician guidance with regard to appropriate care and how to proceed.	The student recognized the need for emergency and/or collaborative care in a timely manner and did not require clinician guidance with regard to how to proceed.
6. MCO 2.5 - Implement appropriate active care as identified in the management plan.	The student did not include and/or implement active care in the management plan that was appropriate for the patient's case and phase of care. Required significant clinician involvement.	The student includes and implements active care in the management plan but the was not fully appropriate for the patient's case and/or phase of care (i.e. the intensity was not graded appropriately for the patient, or the activity was not meaningful to the patient's needs, etc.). Clinician involvement was required.	The student includes and implements active care in the patient management plan that is properly graded, meaningful and appropriate for the patient's case and phase of care with minimal clinician involvement.	The student includes and implements active care in the patient management plan that is properly graded, meaningful and appropriate for the patient's case and phase of care without clinician involvement.
7. MCO 2.6 - Make recommendations for changes in lifestyle behaviors, activities of daily living and/or dietary and nutritional habits as appropriate.	The student did not document recommendations regarding lifestyle, nutritional and/or ADLs. Needed significant clinician guidance.	The student did not document on 1 element of lifestyle behavior, ADLs, or diet/nutritional habits. Needed clinician guidance.	The student documented appropriate recommendations regarding lifestyle behaviors, ADLs and/or nutritional habits. Limited clinician guidance needed.	The student documented relevant and appropriate lifestyle behaviors, ADLs and/or dietary/nutritional habits without clinician guidance.
8. MCO 2.7 - Implement changes to management plan as new clinical information becomes available	The student did not implement changes to the patient's management plan based on new clinical information (i.e. changing the procedures, frequency, etc. to reflect the patient's phase of care). Needed significant clinician guidance.	The treatment plan was modified to some degree to reflect current clinical information, however, was incomplete (i.e. the student changed the frequency of visits to reflect the need for less frequent visits, however, they did not integrate self-care, a home exercise program, etc.). Needed clinician guidance.	The student implemented changes to the management plan as new clinical information became available and understood why those changes were being recommended. Limited clinician guidance was needed.	The student changed the treatment plan's frequency, procedures, self-care, etc. appropriately and reflective of the patient's current needs and presentation without clinician guidance.
9. MCO 2.8 - Identify maximum improvement and document endpoint of care or rationales for continuing care	The student did not identify meaningful patient improvements/changes, or failed to acknowledge arrival at maximum improvement, or did not rationalize the need for continued care. Required significant clinician guidance.	The student identified maximal improvement, release from care, or the need for continued care, however, did not clearly rationalize their decision. Required clinician guidance.	The student adequately identified the rationale for continued care and management, or to release the patient from further treatment. Required limited clinician guidance.	The student identified maximal improvement, release from care, or the need for further care using current information to support their decision without clinician guidance. Their decisions were consistent with guideline recommendations.

Case Management Review Evaluation Rubric

10. MCO 3.1 - Manage health risks and public health issues, including reporting, as required	The student did not document management of health risks, and/or public health issues, and/or required reporting. Required significant clinician involvement.	The student documented management of health risks and public health issues, but failed to document appropriate reporting, or the list was incomplete or inappropriate for the specific case. Required clinician involvement.	The student documented management of health risks and public health issues, including reporting, as required. Needed minimal clinician involvement/prompting.	The student documented management of health risks and public health issues, including reporting, as required without clinician involvement.
11. MCO 3.2 - Recommend or provide resources & instruction regarding public health issues	The student did not recommend or provide resources and/or instruction regarding public health issues. Required significant clinician involvement.	The student recommended or provided resources and/or instruction regarding public health issues that was either incomplete or inappropriate for this particular case. Required clinician involvement and/or prompting.	The student recommended or provided resources and/or instruction regarding public health issues that were mostly appropriate for this case and did so with minimal clinician involvement/prompting.	The student recommended or provided resources and/or instruction regarding public health issues that were appropriate for this case and did so without clinician involvement or prompting.
12. MCO 4.1 - Document health risks and management options considering the patient's health care needs/goals	The student did not document the patient's health risks or management options and failed to consider the patient's health care needs/goals. Required significant clinician involvement.	The student was incomplete in their documentation of the patient's health risks, or their management options, or failed to relate them to the patient's health care needs/goals. Required clinician involvement.	The student documented the patient's health risks and appropriately addressed management options. The management options were consistent with the patient's needs and goals. Required little clinician guidance/intervention.	The student fully documented the patient's health risks, related them to their needs/goals, and was complete in the management options both within and outside of the health center without needing clinician assistance.
13. MCO 4.5 - Patient records are in compliance with laws, regulations & accepted industry standards	The student's recordkeeping is lacking full compliance with laws, regulations and accepted industry standards because of the information documented, omitted, and/or the veracity of the information (i.e. the information was falsified, etc.). Required significant clinician involvement.	The student's recordkeeping lacked full compliance with laws, regulations, or accepted industry standards because of the information documented, omitted, and/or the veracity of the information. Records contain moderate compliance issues that are honest mistakes. Requires clinician oversight and involvement.	The student's recordkeeping is generally in full compliance with laws, regulations and accepted standards and the information within the records is complete and authentic, or the student has minor compliance issues that are honest mistakes and makes a good-faith effort to be in compliance. Requires minimal clinician management/oversight.	The student's recordkeeping is in compliance with all laws, regulations and accepted standards. The information is authentic and requires no prompting or other clinician involvement.
14. MCO 6.1 - Use relevant scientific literature & other evidence to inform patient care	The student did not use or did not document references to scientific literature and/or other accepted evidence to inform the patient care plan. Required significant clinician involvement.	The student's use and/or documentation of scientific literature and/or other accepted evidence to inform patient care was incomplete or misinterpreted. Required clinician involvement.	The student documented some references to scientific literature and/or other accepted evidence to inform the patient care plan with minimal prompting/involvement from the clinician.	The student documented references to scientific literature and/or other accepted evidence to inform the patient care plan without prompting or involvement from a clinician.
15. MCO 7.1 - Identify VSC of the spine and/or other articulations	The student did not identify VSC and/or non-spinal articular dysfunction, and/or did so by using a method other than PART. Required significant clinician involvement.	The student identified some VSC and/or non-spinal articular dysfunction, but missed significant findings and/or did not properly use PART in their documentation. Required clinician prompting/involvement.	The student identified VSC and/or dysfunction of non-spinal articulations using PART in all appropriate areas for this case and did so with minimal prompting or involvement from the clinician.	The student identified VSC and/or dysfunction of non-spinal articulations using PART in all appropriate areas for this case and did so without prompting or involvement from the clinician.

Case Management Review Evaluation Rubric

16. MCO 7.2 - Analyze & interpret findings indicating the need for chiropractic adjustment	The student did not analyze and/or interpret PART and/or non-PART findings to determine the need for chiropractic adjustment. Or used methods not taught in the CUKC curriculum as part of their analysis and/or interpretation. Required significant clinician oversight.	The student did not appropriately analyze and/or interpret PART and/or non-PART findings indicating the need for chiropractic adjustment. Required clinician prompting/involvement.	The student appropriately analyzed and interpreted PART and non-PART findings indicating the need for chiropractic adjustment with minimal prompting/involvement from a clinician.	The student appropriately analyzed and interpreted PART and non-PART findings indicating the need for chiropractic adjustment without the prompting/involvement of a clinician.
17. MCO 7.3 - Identify indications, contraindications & risk factors for the chiropractic adjustment	The student failed to identify indications and/or contraindications, and/or risk factors for chiropractic adjustments in this case. Required significant clinician involvement.	The student failed to identify 1 indication, or contraindication, or risk factor for chiropractic adjustment pertinent to this case. Required clinician prompting/involvement.	The student identified all indications, contraindications, and risk factors for chiropractic adjustment that were pertinent to this case and did so with little clinician involvement/prompting.	The student identified all indications, contraindications, and risk factors for chiropractic adjustment that were pertinent to this case and did so with no clinician involvement/prompting.