



AMERICAN OSTEOPATHIC BOARD OF SURGERY

CASE PREPARATION INSTRUCTIONS FOR THE PLR CLINICAL PORTION OF THE EXAMINATION

1. The Board will review logs and select a minimum of five (5) cases plus all mortalities for review.
2. **Each candidate is to submit one copy of each clinical case review in a PDF format to include:**

● Case summary	● Operative report face sheet	● All consults
● History and physical	● OR worksheet	● Progress notes (physician only)
● Admission note	● Billing, including CPT codes*	● Discharge summary
● All labs, x-ray, and pathology	● Autopsy (if applicable)	● Pre- and post-operative photos (MANDATORY)
● Pertinent office records	● Pathology report	
● Anesthesia record	● All orders	

* Please include: health insurance claims forms, electronically-generated bills including those given to patients but not submitted to third-party payors, invoices for cosmetic procedures and for procedures performed gratis.

Each case should be submitted in a separate PDF file identifying the case number. Cases are to be submitted via the AOBS application portal [HERE](#).

All patient identifiers (i.e., name, address, social security number, etc.) **must be redacted throughout each case.**

3. Cases must be submitted to the AOBS office no later than **August 9th.**

GUIDELINES FOR PREPARATION OF CASES FOR BOARD REVIEW

I. Pre-op Evaluation Elements

- A. Chief Complaint
- B. History of Chief Complaint
- C. Associated Medical Problems
- D. Workup of Above, Including
 - 1. Lab
 - 2. Diagnostics
 - 3. Operative and Pathology Reports from Previous Biopsy or Surgery
 - 4. Special Studies (i.e., angiograms)
 - 5. Pre- and Post-operative Photos
 - 6. Bills (including Health Insurance Claims Forms and Electronically-generated Bills)
 - 7. CPT Coding
- E. Medical History
- F. Surgical History
- G. Medications
- H. Allergies
- I. Review of Systems Including Musculoskeletal Complaints
- J. Complete Physical findings as Related to Procedure Planned or Problem Examined
- K. Working Diagnosis (Including Pre-op Staging)
- L. Rationale for Surgery - Hospital Consult, Office Notes, History & Physical or a Combination
 - 1. Need for Surgery vs. Medical Therapy
 - 2. Procedure Planned

II. Operative Elements

- A. Appropriate Procedure for Problem Found at Time of Surgery
- B. Operative Note (Rational, Readable, Realistic)
- C. Operative Time
- D. Blood Loss
- E. All Complications (Acceptable or Unacceptable, List Regardless of How Small or Large)
- F. Pathology Report Including Any Special Studies on Tissue

III. Other Elements

- A. Care (Inpatient or outpatient, Appropriate to Situation but Must Cover Therapy until Point of Discharge from Surgeon's Care)
- B. Length of Stay (Appropriate for Inpatient Diagnosis)
- C. Stability at Time of Inpatient Discharge
 - 1. Wound Healing
 - 2. Results of All Cultures, Tests and X-rays Addressed in Record
 - 3. Other Medical Problems Addressed
- D. If Abnormalities are found in Outpatient Pre-op Testing, These Items Should Also Be Addressed in Records Submitted from Office Chart

IV. Follow-up Care Indicated in Chart (Oncologic and Non-oncologic Problems) Including

- A. Need for Further Testing, Consultations, Treatment
- B. Medications
- C. Specialized Nursing Needs
- D. Restrictions of Activities
- E. Diet

V. Post-op Staging

VI. Discharge Summary Including

- A. Hospital Discharge Summary
- B. Dictated Discharge Summary When Patient is Discharged to the Care of Referring Physician

YOUR ORAL CASE PRESENTATION EXAMINATION BEGINS WITH THE SUBMISSION OF THE REQUESTED CASES. IF THESE ARE NOT COMPLETE AND WELL-ORGANIZED, YOU MAY FAIL THE EXAMINATION.

INCLUDE ALL REQUESTED INFORMATION AS DESCRIBED IN THESE INSTRUCTIONS.

DO NOT INCLUDE ITEMS THAT ARE NOT REQUESTED (I.E., NURSES ORDERS).

REMEMBER! ALL IDENTIFYING PATIENT INFORMATION MUST BE REDACTED FROM EVERY CHART.

APPEARANCE OF SUBMITTED MATERIALS

Each PLR oral examination case review should be submitted to the Board in a neat and orderly fashion.

Following are some examples and notes to assist you in preparing acceptable materials for a Board review.

A CASE SUMMARY MUST BE INCLUDED AS THE FIRST PAGE IN YOUR CHART. A case summary differs from the discharge summary in that the case summary details the case from first presentation through discharge and is a recap of the entire case. It is a single-page summary of pre-operative, operative and post-operative course including the outcome and final condition of the patient.

Candidates will prepare each case as a PDF file with an identifying case number. Bookmarks should be inserted corresponding to the following tabs:

● Case summary	● Operative report face sheet	● All consults
● History and physical	● OR worksheet	● Progress notes (physician only)
● Admission note	● Billing, including CPT codes*	● Discharge summary
● All labs, x-ray and pathology	● Autopsy, if applicable	● Pre- and post-operative photos (MANDATORY)
● Pertinent office records	● Pathology report	
● Anesthesia record	● All orders	

IMPORTANT: During your preparation of the cases, if one or more of the tabs (i.e., consults) will remain empty, insert a sheet stating “INTENTIONALLY LEFT BLANK” that lets the examiners know that there is nothing to submit for this tab.

Notes for completion of case records:

- It is recommended that the case be completely prepared in paper form then scanned and bookmarks inserted to correspond with the tabs above.
- ***The candidates must bring a complete printed copy of each case chart to the exam. Additionally, they may bring a laptop or laptop equivalent with their pdf files and any supporting material.***
- Numerous commercially available software packages are available for preparation or outside document services can assist with the process of scanning and bookmarking the document. (If using an outside service ensure they are HIPAA compliant.)

You may bring additional information with you to the examination in order to defend your cases. Neatness is required for the cases to be reviewed by the Board.

Submit your oral examination fee, completed Sign-Off form and AOBS Business Agreement and charts via the AOBS application portal [HERE](#). The AOBS office must receive all required documents by the stated deadline. There will be no exception to the policy.

ATTESTATION: The American Osteopathic Board of Surgery requests that the cases and medical records that you submit for review for your PLR oral examination reflect true and accurate information.

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