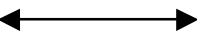


# Patient Centered Observation Form- Clinician version


Trainee name \_\_\_\_\_ Observer \_\_\_\_\_ Obsrvn# \_\_\_\_\_ Date \_\_\_\_\_

Directions; Track behaviors in left column. Then, mark one box per row: a, b or c. Competent skill use is in one of the right two right side columns. Record important provider / patient comments and verbal / non-verbal cues in the notes. Use form to enhance your learning, vocabulary, and self-awareness. Ratings can be for individual interviews or to summarize several interactions. If requested, use this form to guide verbal feedback to someone you observe.

<b>Skill Set and elements</b> Check only what you see or hear. Avoid giving the benefit of the doubt.	<b>Provider Centered Biomedical Focus</b>		<b>Patient Centered Biopsychosocial Focus</b>
<b>Establishes Rapport</b> <input type="checkbox"/> Introduces self (before gazing at computer) <input type="checkbox"/> Warm greeting (before gazing at computer) <input type="checkbox"/> Acknowledges all in the room by name <input type="checkbox"/> Uses eye contact <input type="checkbox"/> Humor or non medical interaction	<input type="checkbox"/> 1a. Uses 0-2 elements	<input type="checkbox"/> 1b. Uses 3 elements.	<input type="checkbox"/> 1c. Uses ≥ 4 elements  Notes: <b>FM GME Milestones- C 1.1 - 1.3; C 2.1; PC-4.4; PROF 3.1</b>
<b>Maintains Relationship Throughout the Visit</b> <input type="checkbox"/> Uses verbal or non-verbal empathy during discussions or during the exam <input type="checkbox"/> Uses continuer phrases ("um hmm") <input type="checkbox"/> Repeats (reflects) important verbal content <input type="checkbox"/> Demonstrates presence, curiosity, intent focus, not seeming "rushed" and acknowledges distractions	<input type="checkbox"/> 2a. Uses 0-1 elements	<input type="checkbox"/> 2b. Uses 2 elements	<input type="checkbox"/> 2c. Uses 3 or more elements  Notes: <b>C 2.3; PC 2.2,4.4; PROF 3.1</b>
<b>Collaborative upfront agenda setting</b> <input type="checkbox"/> Acknowledges agenda items from other team member (eg MA) or from EMR. <input type="checkbox"/> Additional elicitation- "something else?" * X _____ * each elicitation counts as a new element <input type="checkbox"/> Asks or confirms what is most important to patient.	<input type="checkbox"/> 3a. Uses 0-1 elements	<input type="checkbox"/> 3b. Uses 2 elements	<input type="checkbox"/> 3c. Uses ≥ 3 elements  Note patient concerns here: <b>C 2.3; SBP 2.2</b>
<b>Maintains Efficiency using transparent (out loud) thinking and respectful interruption:</b> <input type="checkbox"/> Talks about visit time use / visit organization <input type="checkbox"/> Negotiates priorities (includes provider agenda items) <input type="checkbox"/> Talks about problem solving strategies <input type="checkbox"/> Respectful interruption/redirection using EEE: Excuse your self, Empathize/validate issue being interrupted, Explain the reason for interruption ( eg, for Topic tracking)	<input type="checkbox"/> 4a. Uses 0 elements	<input type="checkbox"/> 4b. Uses 1 element	<input type="checkbox"/> 4c. Uses 2 or more elements  Notes: <b>SBP 1.3-5</b>
<b>Gathering Information</b> <input type="checkbox"/> Uses open-ended question X _____ <input type="checkbox"/> Uses reflecting statement X _____ <input type="checkbox"/> Uses summary/clarifying statement X _____ Count each time the skill is used as one element	<input type="checkbox"/> 5a. Uses 0-1 elements	<input type="checkbox"/> 5b. Uses 2 elements	<input type="checkbox"/> 5c. Uses 3 or more elements  Notes: <b>PC-1.1;3.1 PROF 3.3-3.4</b>
<b>Assessing Patient or Family Perspective on Health</b> <input type="checkbox"/> Acknowledges patient verbal or non-verbal cues. <input type="checkbox"/> Explores patient beliefs (explanatory model) or feelings <input type="checkbox"/> Explores contextual influences: family, cultural, spiritual. Number of patient verbal / non-verbal cues _____	<input type="checkbox"/> 6a. Uses 0 elements	<input type="checkbox"/> 6b. Uses 1 element	<input type="checkbox"/> 6c. Uses 2 or more elements  Notes: <b>C 2.3 PROF 3.1-3.4</b>

# Patient Centered Observation Form- Clinician version

Trainee name \_\_\_\_\_ Observer \_\_\_\_\_ Obsrvn# \_\_\_\_\_ Date \_\_\_\_\_

<b>Skill Set and elements</b> <i>Check only what you see or hear.</i> <i>Avoid giving the benefit of the doubt.</i>	<b>Provider Centered Biomedical Focus</b>		<b>Patient Centered Biopsychosocial Focus</b>
<b>Electronic Medical Record Use</b> <input type="checkbox"/> By 10 seconds, describes reason for each screen gaze <input type="checkbox"/> Shares/points at screen during at least 2 visit phases (agenda setting, history, Rx / Lab review, typing AVS) <input type="checkbox"/> Maintains eye contact and/or shares screen at least 2/3rds of the visit <input type="checkbox"/> Ask patient to confirm or contribute to documentation	<input type="checkbox"/> 7a. Uses 0 or 1 elements.	<input type="checkbox"/> 7b. Uses 2 elements	<input type="checkbox"/> 7c. Uses 3 or 4 elements
Notes: <b>C3.3;C4.1-3</b>			
<b>Physical Exam</b> <input type="checkbox"/> Prepares patient before physical exam actions <b>and</b> describes exam findings during the exam <i>("I am going to ____ " then "your lungs sound healthy")</i>	<input type="checkbox"/> 8a. 0-1 exam elements (eg., lungs)	<input type="checkbox"/> 8b. 2 exam elements (eg, heart, lung)	<input type="checkbox"/> 8c. > 2 exam elements (eg, heart, lung, ears)
Notes: <b>C 2.1-2,4; PC 2.2</b>			
<b>Sharing Information</b> <input type="checkbox"/> Avoids or explains medical jargon <input type="checkbox"/> Summaries cover biomedical concerns <input type="checkbox"/> Summaries cover psychosocial concerns. <input type="checkbox"/> Invites Q/A	<input type="checkbox"/> 9a. Uses 0-1 elements	<input type="checkbox"/> 9b. Uses 2 elements	<input type="checkbox"/> 9c. Uses 3 or more elements
Notes: <b>C 2.1; PC 4.3</b>			
<b>Behavior Change/Self Management</b> <input type="checkbox"/> Asks if patient wants help with health behavior change. <input type="checkbox"/> Explores pros and cons of behaviors (respects ambivalence) <input type="checkbox"/> Reflects comments about: desire, ability, reason, need. <input type="checkbox"/> Asks permission to give advice <b>If patient wants help, asks patient:</b> <input type="checkbox"/> To brainstorm activities and choose one to reach goal <input type="checkbox"/> To name activity frequency and time of day <input type="checkbox"/> Scales confidence in change (1- 10) <input type="checkbox"/> Assesses patient barriers <input type="checkbox"/> Adjusts plan to address barriers <input type="checkbox"/> Uses action plan worksheet (in AVS or separate) <input type="checkbox"/> Affirms prior / current behavior change effort	<input type="checkbox"/> 10c. Uses 0-1 elements or lectures patient	<input type="checkbox"/> 10b. Uses 2-3 elements	<input type="checkbox"/> 10c. Uses 4 or more elements
Notes: <b>C 2.4; PC 1.2; 2.3-5</b>			
<b>Co-creating a plan</b> <input type="checkbox"/> Describes options <input type="checkbox"/> Discusses pros and cons <input type="checkbox"/> Discusses uncertainties with the decision <input type="checkbox"/> Assesses patient understanding <input type="checkbox"/> Asks for patient preferences <input type="checkbox"/> Identifies and resolves decisional differences <input type="checkbox"/> Plan respects patients goals and values	<input type="checkbox"/> 11a. Use 0-2 element	<input type="checkbox"/> 11b. Uses 3-4 elements	<input type="checkbox"/> 11c. Uses ≥ 5 elements
Notes: <b>C 1.3;C 2.3-4; PC3.3; PROF 3.3-4</b>			
<b>Closure</b> <input type="checkbox"/> Asks for questions about today's topics. <input type="checkbox"/> Co-creates and prints a readable After Visit Summary <input type="checkbox"/> Uses Teachback. = Asking the patient to explain his/her understanding of the plan <input type="checkbox"/> Combines Teachback and AVS creation while sharing the screen or notepad. (Counts for 3 elements)	<input type="checkbox"/> 12a. Uses 0-1 element	<input type="checkbox"/> 12b. Uses 2 elements	<input type="checkbox"/> 12c. Uses 3 elements
Notes: <b>C 4.1-4; PC 2.2</b>			