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.

<table>
<thead>
<tr>
<th>Skill Set and elements</th>
<th>Provider Centered Biomedical Focus</th>
<th>Patient Centered Biopsychosocial Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Establishes Rapport</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Introduces self</td>
<td>1a. Uses 0-2 elements</td>
<td>1c. Uses ≥ 4 elements</td>
</tr>
<tr>
<td>□ Warm greeting</td>
<td>1b. Uses 3 elements</td>
<td></td>
</tr>
<tr>
<td>□ Acknowledges all in the room by name</td>
<td>2a. Uses 0-1 elements</td>
<td></td>
</tr>
<tr>
<td>□ Uses eye contact</td>
<td>2b. Uses 2 elements</td>
<td></td>
</tr>
<tr>
<td>□ Humor or non medical interaction</td>
<td>2c. Uses 3 or more elements</td>
<td></td>
</tr>
</tbody>
</table>

Notes:

<table>
<thead>
<tr>
<th>Maintains Relationship Throughout the Visit</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Uses verbal or non-verbal empathy during discussions or during the exam</td>
<td>3a. Uses 0-1 elements</td>
<td>3b. Uses 2 elements</td>
</tr>
<tr>
<td>□ Uses continuers phrases (&quot;um hmm&quot;)</td>
<td>3c. Uses ≥ 3 elements</td>
<td></td>
</tr>
<tr>
<td>□ Repeats important verbal content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Demonstrates mindfulness through presence, curiosity, intent focus, not seeming &quot;rushed&quot; or acknowledging distractions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes:

<table>
<thead>
<tr>
<th>Collaborative upfront agenda setting</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Additional elicitation- &quot;something else?&quot; * X______</td>
<td>4a. Uses 0 elements</td>
<td>4b. Uses 1 element</td>
</tr>
<tr>
<td>* each elicitation counts as a new element</td>
<td>4c. Uses 2 or more elements</td>
<td></td>
</tr>
<tr>
<td>□ Acknowledges agenda items from other team member (eg MA) or from EMR.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Asks or confirms what is most important to patient.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note patient concerns here:

<table>
<thead>
<tr>
<th>Maintains Efficiency using transparent (out loud) thinking and respectful interruption:</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Talks about visit time use / visit organization</td>
<td>5a. Uses 0-1 elements</td>
<td>5b. Uses 2 elements</td>
</tr>
<tr>
<td>□ Talks about problem priorities</td>
<td>5c. Uses 3 or more elements</td>
<td></td>
</tr>
<tr>
<td>□ Talks about problem solving strategies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Respectful interruption/redirection using EEE: Excuse your self, Empathize/validate issue being interrupted, Explain the reason for interruption ( eg, for Topic tracking)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes:

<table>
<thead>
<tr>
<th>Gathering Information</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Uses open-ended question X____</td>
<td>6a. Uses 0 elements</td>
<td>6b. Uses 1 element</td>
</tr>
<tr>
<td>□ Uses reflecting statement X____</td>
<td>6c. Uses 2 or more elements</td>
<td></td>
</tr>
<tr>
<td>□ Uses summary/clarifying statement X____</td>
<td></td>
<td></td>
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Notes:

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<tr>
<th>Assessing Patient or Family Perspective on Health</th>
<th></th>
<th></th>
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<tbody>
<tr>
<td>□ Acknowledges patient verbal or non-verbal cues.</td>
<td>7a. Uses 0 elements</td>
<td>7b. Uses 1 element</td>
</tr>
<tr>
<td>□ Explores patient beliefs or feelings</td>
<td>7c. Uses 2 or more elements</td>
<td></td>
</tr>
<tr>
<td>□ Explores contextual influences: family, cultural, spiritual.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of patient verbal / non-verbal cues____</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes:

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Contact Larry Mauksch for further information <Mauksch@uw.edu>
# Patient Centered Observation Form - Clinician version

**Trainee name_________________**

**Observer__________________**

**Obsrvn#____**

**Date__________**

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### Skill Set and elements

Check only what you see or hear. Avoid giving the benefit of the doubt.

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**Notes:**

### Electronic Medical Record Use

- Regularly describes use of EMR to patient
- Maintains eye contact with patient during majority of time while using EMR.
- Positions monitor to be viewed by patient
- Points to screen

**Electronic Medical Record Use**

- Takes EMR use into account throughout the examination.
- Regularly describes use of EMR.
- Maintains eye contact while using EMR.
- Positions monitor to be viewed by the patient.
- Points to screen.

**Notes:**

### Physical Exam

- Prepares patient before physical exam actions and describes exam findings during the exam.

**Physical Exam**

- Preparations before physical exam actions and describes exam findings during the exam.
- Incorporates patient's previous history.
- Discusses exam findings in a clear, understandable manner.

**Notes:**

### Sharing Information

- Avoids or explains medical jargon.
- Summaries cover biomedical concerns.
- Summaries cover psychosocial concerns.
- Invites Q/A

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- Avoids or explains medical jargon.
- Summaries cover biomedical concerns.
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**Notes:**

### Behavior Change Discussions

- Explores patient knowledge about behaviors.
- Explores pros and cons of behavior change.
- Scales importance of or confidence in change (1-10).
- Asks permission to give advice.
- Reflects comments about: desire, ability, reason, need, or commitment to change (respects ambivalence).
- Creates a plan aligned with patient's readiness (see MA/nurse version of PCOF).
- Affirms behavior change effort or success.

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**Notes:**

### Co-creating a plan

- Assesses patient preferred decision making role.
- States the clinical issue or decision to be made.
- Describes options.
- Discusses pros and cons.
- Porn discuss uncertainties with the decision.
- Assesses patient understanding.
- Asks for patient preferences.
- Identifies and resolves decisional differences.
- Plan respects patients goals and values.

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### Closure

- Asks for questions about today's topics.
- Co-creates and prints a readable After Visit Summary.
- Uses Teachback. = Asking the patient to explain his/her understanding of the plan.
- Combines Teachback and AVS creation while sharing the screen or notepad. (Counts for 3 elements)

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