Patient Centered Observation Form:
MA/Nurse

Trainee name_____ Observer_____Obsrvn#____Date_____

Directions: *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 columns. Record important MA/ Nurse or 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.*

Element	MA/Nurse Centered Biomedical Focus ⟷		Patient Centered Biopsychosocial Focus
Establishes Rapport ☐ Introduces self ☐ Warm greeting ☐ Acknowledges all in the room by name ☐ Uses eye contact ☐ Humor or non medical interaction	☐ 1a.Uses 0-2 elements	☐ 1b.Uses 3 elements	☐ 1c.Uses ≥ 4 elements
Maintaining Relationship Through the Interaction ☐ Uses verbal or non-verbal empathy, including during vitals ☐ Listens well using continuer phrases ("um hmm") ☐ Paraphrases important verbal content; ☐ *Demonstrates mindfulness through curiosity, intent focus, not seeming "rushed" or by acknowledging distractions*	☐ 2a. Uses 0-1 elements	☐ 2b. Uses 2 elements	☐ 2c. Uses 3 or more elements
Collaborative upfront agenda setting ☐ Additional elicitation- "something else?"- each elicitation counts as a new element ☐ Acknowledges agenda items from other team member (eg receptionist), from form, or from EMR. ☐ Confirms what is most important to patient?	☐ 3a. Uses 0-1 elements	☐ 3b. Uses 2 elements	☐ 3c. Uses ≥ 3 elements
	NAME THE PROBLEMS RAISED BY PATIENT OR MA/Nurse:		
Maintains Efficiency through transparent (out loud) thinking: ☐ *about visit MA/Nurse time use* ☐ *about entire visit organization* ☐ *about problem solving strategies* ☐*Respectful interruption/redirection using EEE: **E**xcuse your self, **E**mpathize/validate issue being interrupted, **E**xplain the reason for interruption (eg, for Agenda setting, Topic tracking)*	☐ 4a. Uses 0 elements	☐ 4b. Uses 1 element	☐ 4c. Uses 2 or more elements
Basics: Vitals, Checks Meds and Paperwork ☐ Prepares patient and shares vital findings ≥ 2 times ☐ Asks about paperwork ☐ Asks about refills	☐ 5a. Uses 0-1 elements	☐ 5b. Uses 2 elements	☐ 5c. Uses 3 elements
Patient Activation and Engagement **(encourages pt to bring up important issues) ____ #** of clues ☐ Explores patient verbal cue about psychosocial or physical concern ☐ Explores patient non-verbal cue about underlying concern ☐ Asks if patient has questions ☐ Encourages patient to address concerns with provider ☐ Explores contextual influences: family, cultural, spiritual	☐ 6a. Uses 0-1 elements	☐ 6b. Uses 2 elements	☐ 6c. Uses ≥ 3 elements

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Element	MA/Nurse Centered Biomedical Focus ←——————→ Patient Centered Biopsychosocial Focus		

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*

☐ 7a. Uses 0 or 1 5elements.	☐ 7b. Uses 2 elements	☐ 7c. Uses 3 or 4 elements

Gathering Information
- ☐ *Collects focused history per problem*   X____
- ☐ *Uses reflecting statement*   X____
- ☐ *Uses summary/clarifying statement*   X____
  Count each time the skill is used as one element

☐ 8a. Uses 0 elements	☐ 8b. Uses 1-2 elements	☐ 8c. Uses 3 or more elements

Notes:

Self management support: Goal setting and action plan development
NOT PRESENT IN EVERY INTERVIEW
- ☐ Asks if patient wants to create a health goal
- ☐ Asks patient to brainstorm activities to reach goal
- ☐ Asks patient to chose one activity
- ☐ Asks patient to name activity frequency
- ☐ Asks patient to identify time for activity
- ☐ Assesses patient confidence (1 through 10)
- ☐ Assesses patient barriers

☐ 9a. Uses 0-2 elements.	☐ 9b. Uses 3-5 elements	☐ 9c. Uses ≥ 6 elements

Self management Follow-up: Checking on progress, revision
- ☐ Assesses progress on prior goals
- ☐ Problem solves with patient to revise action plan
- ☐ Celebrates patient successes
- ☐ "Normalizes" struggles with self management
- ☐ Ask about including action plan in today's agenda

☐ 10a. Uses 0-1 elements	☐ 10b. Uses 1-3 elements	☐ 10c. Use ≥ 4 elements

Closure and System Navigation
- ☐ Asks for questions about today's topics.
- ☐ Assesses patient comfort with system navigation
- ☐ Provides system navigation aid
- ☐ Uses Teachback. = Asking the patient to explain his/her understanding of the plan
- ☐ Prints After Visit Summary
- ☐ *Combines Teachback and AVS creation while sharing the screen. (Counts for 3 elements)*

☐ 11a. Uses 0-1 elements	☐ 11.b Uses 2-3 elements	☐ 11c. Use ≥ 4 elements