

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.

Skill Set and elements Check only what you see or hear. Avoid giving the benefit of the doubt.	Provider Centered Biomedical Focus		Patient Centered Biopsychosocial Focus
Establishes Rapport <input type="checkbox"/> Introduces self <input type="checkbox"/> Warm greeting <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: FM GME Milestones- IPC 1.1 TO 1.3; PC-4.4 PROF 3.1			
Maintains Relationship Throughout the Visit <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 important verbal content <input type="checkbox"/> Demonstrates mindfulness through presence, curiosity, intent focus, not seeming "rushed" or acknowledging 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: IPC 2.3; PC-4.4; PROF 3.1			
Collaborative upfront agenda setting <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: IPC 2.3			
Maintains Efficiency using transparent (out loud) thinking and respectful interruption: <input type="checkbox"/> Talks about visit time use / visit organization <input type="checkbox"/> Talks about problem priorities <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: PC 1.3			
Gathering Information <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: PROF 3.3-3.4			
Assessing Patient or Family Perspective on Health <input type="checkbox"/> Acknowledges patient verbal or non-verbal cues. <input type="checkbox"/> Explores patient beliefs 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: IPC 2.3 PROF 3.1-3.5			

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Electronic Medical Record Use <input type="checkbox"/> Regularly describes use of EMR to patient <input type="checkbox"/> Maintains eye contact with patient during majority of time while using EMR. <input type="checkbox"/> Positions monitor to be viewed by patient <input type="checkbox"/> Points to screen	<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: IPC; 3.3; 4.1-4.5			
Physical Exam <input type="checkbox"/> Prepares patient before physical exam actions <u>and</u> describes exam findings during the exam ("I am going to ____" then "your lungs sound healthy")	<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: IPC 2.1-2			
Sharing Information <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: IPC 2.1; PC 4.3			
Behavior Change Discussions <input type="checkbox"/> Explores pt knowledge about behaviors <input type="checkbox"/> Explores pros and cons of behavior change <input type="checkbox"/> Scales importance of or confidence in change (1- 10) <input type="checkbox"/> Asks permission to give advice <input type="checkbox"/> Reflects comments about: desire, ability, reason, need, or commitment to change (respects ambivalence) <input type="checkbox"/> Creates a plan aligned with patient's readiness (see MA/nurse version of PCOF <input type="checkbox"/> Affirms behavior change effort or success	<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: IPC 2.4; PC 1.2; 2.3;			
Co-creating a plan <input type="checkbox"/> Assesses patient preferred decision making role <input type="checkbox"/> States the clinical issue or decision to be made <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: IPC 2.3-4; PROF 3.3-4			
Closure <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: IPC 1.3 4.1-5; PC 2.2			