|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Item # | Checklist Item | Always | Most of the time | Some of the time | Rarely | Never | Notes/Comments |
| **Subjective** | | | | | | | |
| 1 | Appropriately reviews chart: problem list, medications, allergies, recent encounters prior to visit |  |  |  |  |  |  |
| 2 | Greets patient warmly, introduces self |  |  |  |  |  |  |
| 3 | Verifies patient with 2 identifiers |  |  |  |  |  |  |
| 4 | Establishes rapport, addresses review of chart / history |  |  |  |  |  |  |
| 5 | Explains limitations of phone/video visit, obtains consent. |  |  |  |  |  |  |
| 6 | Starts with open ended question |  |  |  |  |  |  |
| 7 | Elicits chief complaint |  |  |  |  |  |  |
| 8 | Utilizes OLDCARTS or other tool to elicit full history for CC |  |  |  |  |  |  |
| 9 | Asks appropriate ROS for CC |  |  |  |  |  |  |
| 10 | Rules out red flags for CC |  |  |  |  |  |  |
| 11 | Documents HPI for patient |  |  |  |  |  |  |
| 12 | Asks, “anything else?” to elicit full scope of complaints |  |  |  |  |  |  |
| 13 | Addresses health maintenance/ POE |  |  |  |  |  |  |
| 14 | Reviews medications with patient |  |  |  |  |  |  |
| **Objective** | | | | | | | |
| 14 | Teaches patient to perform physical exam maneuvers if indicated |  |  |  |  |  |  |
| 15 | Documents relevant objective findings (exam/test results, ambulatory BP, home glucose where applicable) |  |  |  |  |  |  |
| **Assessment and Plan** | | | | | | | |
| 16 | Appropriate medical decision-making based on clinical information |  |  |  |  |  |  |
| 17 | Discuss (differential) diagnosis with patient using non-medical terms |  |  |  |  |  |  |
| 18 | Documents thought process in assessment and plan |  |  |  |  |  |  |
| 19 | Develops and discusses plan with patient: including medication, lifestyle changes, labs or imaging |  |  |  |  |  |  |
| 20 | Addresses appropriate follow up plan (in office vs additional virtual visit following results) |  |  |  |  |  |  |
| 21 | If needed, advises patient to seek higher level of care and explains indication |  |  |  |  |  |  |
| 22 | Documents appropriate transportation to higher level of care if indicated |  |  |  |  |  |  |
| 23 | Gives strict return precautions and indications for follow up including time-line |  |  |  |  |  |  |
| 24 | Asks what questions patient has, answers appropriately |  |  |  |  |  |  |
| **Interpersonal Communication** | | | | | | | |
| 25 | Demonstrates empathy |  |  |  |  |  |  |
| 26 | Validates patient’s concerns or feelings |  |  |  |  |  |  |
| 27 | Uses non-judgmental words |  |  |  |  |  |  |
| 28 | Assesses patient’s understanding and buy-in of the treatment plan |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |

Specific comments

What did the resident do well?

What can the resident improve on?