

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 <i>Check only what you see or hear. Avoid giving the benefit of the doubt.</i>	Provider Centered Biomedical Focus	↔	Patient Centered Biopsychosocial Focus
Establishes Rapport <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:			
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 (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:			
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:			
Maintains Efficiency using transparent (out loud) thinking and respectful interruption: <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:			
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:			
Assessing Patient or Family Perspective on Health <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:			

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Electronic Medical Record Use <input type="checkbox"/> <i>By 10 seconds, describes reason for each screen gaze</i> <input type="checkbox"/> <i>Shares/points at screen during at least 2 visit phases (agenda setting, history, Rx / Lab review, typing AVS)</i> <input type="checkbox"/> <i>Maintains eye contact and/or shares screen at least 2/3rds of the visit</i> <input type="checkbox"/> <i>Ask patient to confirm or contribute to documentation</i>	<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:		
Physical Exam <input type="checkbox"/> <i>Prepares patient before physical exam actions and describes exam findings during the exam ("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:		
Sharing Information <input type="checkbox"/> <i>Avoids or explains medical jargon</i> <input type="checkbox"/> <i>Summaries cover biomedical concerns</i> <input type="checkbox"/> <i>Summaries cover psychosocial concerns.</i> <input type="checkbox"/> <i>Invites Q/A</i>	<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:		
Behavior Change/Self Management <input type="checkbox"/> <i>Asks if patient wants help with health behavior change.</i> <input type="checkbox"/> <i>Explores pros and cons of behaviors (respects ambivalence)</i> <input type="checkbox"/> <i>Reflects comments about: desire, ability, reason, need.</i> <input type="checkbox"/> <i>Asks permission to give advice</i> If patient wants help, asks patient: <input type="checkbox"/> <i>To brainstorm activities and choose one to reach goal</i> <input type="checkbox"/> <i>To name activity frequency and time of day</i> <input type="checkbox"/> <i>Scales confidence in change (1- 10)</i> <input type="checkbox"/> <i>Assesses patient barriers</i> <input type="checkbox"/> <i>Adjusts plan to address barriers</i> <input type="checkbox"/> <i>Uses action plan worksheet (in AVS or separate)</i> <input type="checkbox"/> <i>Affirms prior / current behavior change effort</i>	<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:		
Co-creating a plan <input type="checkbox"/> <i>Describes options</i> <input type="checkbox"/> <i>Discusses pros and cons</i> <input type="checkbox"/> <i>Discusses uncertainties with the decision</i> <input type="checkbox"/> <i>Assesses patient understanding</i> <input type="checkbox"/> <i>Asks for patient preferences</i> <input type="checkbox"/> <i>Identifies and resolves decisional differences</i> <input type="checkbox"/> <i>Plan respects patients goals and values</i>	<input type="checkbox"/> 11a. Use 0-2 element	<input type="checkbox"/> 11b. Uses 3-4 elements	<input type="checkbox"/> 11c. Uses ≥ 5 elements
	Notes:		
Closure <input type="checkbox"/> <i>Asks for questions about today's topics.</i> <input type="checkbox"/> <i>Co-creates and prints a readable After Visit Summary</i> <input type="checkbox"/> <i>Uses Teachback. = Asking the patient to explain his/her understanding of the plan</i> <input type="checkbox"/> <i>Combines Teachback and AVS creation while sharing the screen or notepad. (Counts for 3 elements)</i>	<input type="checkbox"/> 12a. Uses 0-1 element	<input type="checkbox"/> 12b. Uses 2 elements	<input type="checkbox"/> 12c. Uses 3 elements
	Notes:		