

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 <input type="checkbox"/> Introduces self (<i>before gazing at computer</i>) <input type="checkbox"/> Warm greeting (<i>before gazing at computer</i>) <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
Maintaining Relationship Through the Interaction <input type="checkbox"/> Uses verbal or non-verbal empathy, including during vitals <input type="checkbox"/> Listens well using continuer phrases (“um hmm”) <input type="checkbox"/> Paraphrases important verbal content; <input type="checkbox"/> <i>Demonstrates presence, curiosity, intent focus, not seeming “rushed” or by acknowledging distractions</i>	<input type="checkbox"/> 2a. Uses 0-1 elements	<input type="checkbox"/> 2b. Uses 2 elements	<input type="checkbox"/> 2c. Uses 3 or more elements
Collaborative upfront agenda setting <input type="checkbox"/> Acknowledges agenda items from other team member (eg receptionist), from form, or from EMR. <input type="checkbox"/> Additional elicitation- “something else?”- <i>each elicitation counts as a new element</i> <input type="checkbox"/> 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
NAME THE PROBLEMS RAISED BY PATIENT OR MA/Nurse:			
Maintains Efficiency through transparent (out loud) thinking: <input type="checkbox"/> <i>about visit MA/Nurse time use</i> <input type="checkbox"/> <i>about entire visit organization</i> <input type="checkbox"/> <i>about problem solving strategies</i> <input type="checkbox"/> <i>Respectful interruption/redirection using EEE: Excuse your self, Empathize/validate issue being interrupted, Explain the reason for interruption (eg, for Agenda setting, Topic tracking)</i>	<input type="checkbox"/> 4a. Uses 0 elements	<input type="checkbox"/> 4b. Uses 1 element	<input type="checkbox"/> 4c. Uses 2 or more elements
Basics: Vitals, Checks Meds and Paperwork <input type="checkbox"/> Prepares patient and shares vital findings ≥ 2 times <input type="checkbox"/> Asks about paperwork <input type="checkbox"/> Asks about refills <input type="checkbox"/> Medication reconciliation	<input type="checkbox"/> 5a. Uses 0-1 elements	<input type="checkbox"/> 5b. Uses 2 elements	<input type="checkbox"/> 5c. Uses 3 elements
Patient Activation and Engagement (encourages pt to bring up important issues) <input type="checkbox"/> Explores patient verbal cue about psychosocial or physical concern <input type="checkbox"/> Explores patient non-verbal cue about underlying concern ___ # of patient cues <input type="checkbox"/> Asks if patient has questions <input type="checkbox"/> Encourages patient to address concerns with provider <input type="checkbox"/> Explores contextual influences: family, cultural, spiritual	<input type="checkbox"/> 6a. Uses 0-1 elements	<input type="checkbox"/> 6b. Uses 2 elements	<input type="checkbox"/> 6c. Uses ≥ 3 elements

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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"/> Shares/points at screen during at least 2 visit phases (agenda setting, history, Rx / Lab review, typing AVS) <input type="checkbox"/> Maintains eye contact and/or shares screen at least 2/3rds of the visit <input type="checkbox"/> Ask patient to confirm or contribute to documentation	<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
Gathering Information <input type="checkbox"/> <i>Collects focused history per problem</i> X____ <input type="checkbox"/> <i>Uses reflecting statement</i> X____ <input type="checkbox"/> <i>Uses summary/clarifying statement</i> X____ <i>Count each time the skill is used as one element</i>	<input type="checkbox"/> 8a. Uses 0 elements	<input type="checkbox"/> 8b. Uses 1-2 elements	<input type="checkbox"/> 8c. Uses 3 or more elements
Notes:			
Self management support: Goal setting and action plan development NOT PRESENT IN EVERY INTERVIEW <input type="checkbox"/> Asks if patient wants to create a health goal <input type="checkbox"/> Asks patient to brainstorm activities to reach goal <input type="checkbox"/> Asks patient to chose one activity <input type="checkbox"/> Asks patient to name activity frequency <input type="checkbox"/> Asks patient to identify when to do activity <input type="checkbox"/> Assesses patient confidence (1 through 10) <input type="checkbox"/> Assesses patient barriers <input type="checkbox"/> Adjusts plan to address barriers <input type="checkbox"/> Uses action plan worksheet (in AVS or separate) <input type="checkbox"/> Affirms prior / current behavior change effort	<input type="checkbox"/> 9a. Uses 0-2 elements.	<input type="checkbox"/> 9b. Uses 3-5 elements	<input type="checkbox"/> 9c. Uses ≥ 6 elements
Self management Follow-up: Checking on progress, revision <input type="checkbox"/> Assesses progress on prior goals <input type="checkbox"/> Problem solves with patient to revise action plan <input type="checkbox"/> Celebrates patient successes <input type="checkbox"/> "Normalizes" struggles with self management <input type="checkbox"/> Ask about including action plan in today's agenda	<input type="checkbox"/> 10a. Uses 0-1 elements	<input type="checkbox"/> 10b. Uses 1-3 elements	<input type="checkbox"/> 10c. Use ≥ 4 elements
Closure and System Navigation <input type="checkbox"/> Asks for questions about today's topics. <input type="checkbox"/> Assesses patient comfort with system navigation <input type="checkbox"/> Provides system navigation aid <input type="checkbox"/> Uses Teachback. = Asking the patient to explain his/her understanding of the plan <input type="checkbox"/> Prints After Visit Summary <input type="checkbox"/> <i>Combines Teachback and AVS creation while sharing the screen. (Counts for 3 elements)</i>	<input type="checkbox"/> 11a. Uses 0-1 elements	<input type="checkbox"/> 11.b Uses 2-3 elements	<input type="checkbox"/> 11c. Use ≥ 4 elements