

# 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.*

| <b>Skill Set and elements</b><br><i>Check only what you see or hear.<br/>Avoid giving the benefit of the doubt.</i>  | <b>Provider Centered<br/>Biomedical Focus</b>     | ←————→   | <b>Patient Centered<br/>Biopsychosocial Focus</b>       |
|--|---|--|---|
| <b>Establishes Rapport</b><br><input type="checkbox"/> Introduces self<br><input type="checkbox"/> Warm greeting<br><input type="checkbox"/> Acknowledges all in the room by name<br><input type="checkbox"/> Uses eye contact<br><input type="checkbox"/> Humor or non medical interaction  | <input type="checkbox"/><br>1a. Uses 0-2 elements | <input type="checkbox"/><br>1b. Uses 3 elements. | <input type="checkbox"/><br>1c. Uses ≥ 4 elements       |
| Notes:   |   |  |   |
| <b>Maintains Relationship Throughout the Visit</b><br><input type="checkbox"/> Uses verbal or non-verbal empathy during discussions or during the exam<br><input type="checkbox"/> Uses continuer phrases (“um hmm”)<br><input type="checkbox"/> Repeats important verbal content<br><input type="checkbox"/> Demonstrates mindfulness through presence, curiosity, intent focus, not seeming “rushed” or acknowledging distractions | <input type="checkbox"/><br>2a. Uses 0-1 elements | <input type="checkbox"/><br>2b. Uses 2 elements  | <input type="checkbox"/><br>2c. Uses 3 or more elements |
| Notes:   |   |  |   |
| <b>Collaborative upfront agenda setting</b><br><input type="checkbox"/> Additional elicitation- “something else?” * X _____<br><i>* each elicitation counts as a new element</i><br><input type="checkbox"/> Acknowledges agenda items from other team member (eg MA) or from EMR.<br><input type="checkbox"/> Asks or confirms what is most important to patient.   | <input type="checkbox"/><br>3a. Uses 0-1 elements | <input type="checkbox"/><br>3b. Uses 2 elements  | <input type="checkbox"/><br>3c. Uses ≥ 3 elements       |
| Note patient concerns here:  |   |  |   |
| <b>Maintains Efficiency through transparent (out loud) thinking:</b><br><input type="checkbox"/> about visit time use / visit organization<br><input type="checkbox"/> about problem priorities<br><input type="checkbox"/> about problem solving strategies   | <input type="checkbox"/><br>4a. Uses 0 elements   | <input type="checkbox"/><br>4b. Uses 1 element   | <input type="checkbox"/><br>4c. Uses 2 or more elements |
| Notes:   |   |  |   |
| <b>Gathering Information</b><br><input type="checkbox"/> Uses open-ended question                    X _____<br><input type="checkbox"/> Uses reflecting statement                    X _____<br><input type="checkbox"/> Uses summary/clarifying statement        X _____<br><i>Count each time the skill is used as one element</i>  | <input type="checkbox"/><br>5a. Uses 0-1 elements | <input type="checkbox"/><br>5b. Uses 2 elements  | <input type="checkbox"/><br>5c. Uses 3 or more elements |
| Notes:   |   |  |   |
| <b>Assessing Patient or Family Perspective on Health</b><br><input type="checkbox"/> Acknowledges patient verbal or non-verbal cues.<br><input type="checkbox"/> Explores patient beliefs or feelings<br><input type="checkbox"/> Explores contextual influences: family, cultural, spiritual.<br>Number of patient verbal / non-verbal cues _____   | <input type="checkbox"/><br>6a. Uses 0 elements   | <input type="checkbox"/><br>6b. Uses 1 element   | <input type="checkbox"/><br>6c. Uses 2 or more elements |
| Notes:   |   |  |   |

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| <b>Skill Set and elements</b><br><i>Check only what you see or hear.</i><br><i>Avoid giving the benefit of the doubt.</i>  | <b>Provider Centered<br/>Biomedical Focus</b>                          | ↔   | <b>Patient Centered<br/>Biopsychosocial Focus</b>                         |
|--|--|---|---|
| <b>Electronic Medical Record Use</b><br><input type="checkbox"/> Regularly describes use of EMR to patient<br><input type="checkbox"/> Maintains eye contact with patient during majority of time while using EMR.<br><input type="checkbox"/> Positions monitor to be viewed by patient<br><input type="checkbox"/> Points to screen  | <input type="checkbox"/><br>7a. Uses 0 or 1 elements.                  | <input type="checkbox"/><br>7b. Uses 2 elements                   | <input type="checkbox"/><br>7c. Uses 3 or 4 elements                      |
| Notes:   |  |   |   |
| <b>Physical Exam</b><br><input type="checkbox"/> Prepares patient before physical exam actions <b>and</b> describes exam findings during the exam<br>("I am going to ___" then "your lungs sound healthy")   | <input type="checkbox"/><br>8a. 0-1 exam elements (eg., lungs)         | <input type="checkbox"/><br>8b. 2 exam elements (eg, heart, lung) | <input type="checkbox"/><br>8c. > 2 exam elements (eg, heart, lung, ears) |
| Notes:   |  |   |   |
| <b>Sharing Information</b><br><input type="checkbox"/> Avoids or explains medical jargon<br><input type="checkbox"/> Summaries cover biomedical concerns<br><input type="checkbox"/> Summaries cover psychosocial concerns.<br><input type="checkbox"/> Invites Q/A  | <input type="checkbox"/><br>9a. Uses 0-1 elements                      | <input type="checkbox"/><br>9b. Uses 2 elements                   | <input type="checkbox"/><br>9c. Uses 3 or more elements                   |
| Notes:   |  |   |   |
| <b>Behavior Change Discussions</b><br><input type="checkbox"/> Explores pt knowledge about behaviors<br><input type="checkbox"/> Explores pros and cons of behavior change<br><input type="checkbox"/> Scales importance of or confidence in change (1- 10)<br><input type="checkbox"/> Asks permission to give advice<br><input type="checkbox"/> Reflects comments about: desire, ability, reason, need, or commitment to change (respects ambivalence)<br><input type="checkbox"/> Creates a plan aligned with patient's readiness ( see MA/nurse version of PCOF<br><input type="checkbox"/> Affirms behavior change effort or success | <input type="checkbox"/><br>10c. Uses 0-1 elements or lectures patient | <input type="checkbox"/><br>10b. Uses 2-3 elements                | <input type="checkbox"/><br>10c. Uses 4 or more elements                  |
| Notes:   |  |   |   |
| <b>Co-creating a plan</b><br><input type="checkbox"/> Assesses patient preferred decision making role<br><input type="checkbox"/> States the clinical issue or decision to be made<br><input type="checkbox"/> Describes options<br><input type="checkbox"/> Discusses pros and cons<br><input type="checkbox"/> Discusses uncertainties with the decision<br><input type="checkbox"/> Assesses patient understanding<br><input type="checkbox"/> Asks for patient preferences<br><input type="checkbox"/> Identifies and resolves decisional differences<br><input type="checkbox"/> Plan respects patients goals and values              | <input type="checkbox"/><br>11a. Use 0-2 element                       | <input type="checkbox"/><br>11b. Uses 3-4 elements                | <input type="checkbox"/><br>11c. Uses ≥ 5 elements                        |
| Notes:   |  |   |   |
| <b>Closure and Follow-up</b><br><input type="checkbox"/> Asks for questions about today's topics.<br><input type="checkbox"/> Co-creates and prints a readable After Visit Summary<br><input type="checkbox"/> Uses Teachback. = Asking the patient to explain his/her understanding of the plan<br><input type="checkbox"/> Combines Teachback and AVS creation while sharing the screen or notepad. (Counts for 3 elements)  | <input type="checkbox"/><br>12a. Uses 0-1 element                      | <input type="checkbox"/><br>12b. Uses 2 elements                  | <input type="checkbox"/><br>12c. Uses 3 elements                          |
| Notes:   |  |   |   |