Patient Centered Observation Form - Clinician version

Trainee name_____ Observer_____ Obsrvn#____ Date_____

Directions; Track behaviors in the left-side column. Mark one box per row. Competent skill use is in either of the two right side columns. Only rate what you see; avoid giving benefit of the doubt. Use notes to record questions, patient cues, and reflections for subsequent discussion and learning. This form is designed to help structure feedback, build vocabulary, and enhance self-awareness. . There is an inverse relationship between patient complexity and demonstration of competence until sufficient training is acquired. No single observation should characterize competency; as the number of observations increases so does the accuracy of competency assessment.

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 ☐ Introduces self (before gazing at computer) ☐ Warm greeting (before gazing at computer) ☐ Acknowledges all in the room by name ☐ Uses eye contact ☐ Humor or non-medical interaction	☐ 1a. Uses 0-2 elements	☐ 1b. Uses 3 elements	☐ 1c. Uses ≥ 4 elements
Notes: FM ACGME Milestones 2.0 ICS 1.1 - 1.4			
Maintains Relationship Throughout the Visit ☐ Uses verbal or non-verbal empathy during discussions or during the exam ☐ Uses continuer phrases ("*um hmm*") ☐ Repeats (reflects) important verbal content ☐ Demonstrates presence, curiosity, intent focus, not seeming "rushed" and acknowledges distractions	☐ 2a. Uses 0-1 elements	☐ 2b. Uses 2 elements	☐ 2c. Uses ≥ 3 elements
Notes: ICS 1.1-4; PROF 1.2-4			
Collaborative Agenda Setting ☐ Acknowledges agenda items from other team member (e.g., MA) or from EMR. ☐ Additional elicitation- *"something else?"* * X____ Each elicitation counts as a new element ☐ Asks or confirms what is most important to patient.	☐ 3a. Uses 0-1 elements	☐ 3b. Uses 2 elements	☐ 3c. Uses ≥ 3 elements
Note patient concerns here: ICS 1.2; PC 2.4			
Maintains Efficiency Using Transparent (out loud) Thinking and Respectful Interruption: ☐ Talks about visit time use / visit organization ☐ Negotiates priorities (includes provider agenda items) ☐ Talks about problem solving strategies ☐ Respectful interruption/redirection using EEE: **E**xcuse yourself, **E**mpathize/validate issue being interrupted, **E**xplain the reason for interruption (e.g., Topic Tracking)	☐ 4a. Uses 0 elements	☐ 4b. Uses 1 element	☐ 4c. Uses ≥ 2 elements
Notes: ICS 1.2-4; Prof 2.1-3; PC 2.4			
Gathering Information ☐ Uses open-ended question X_____ ☐ Uses reflecting statement X_____ ☐ Uses summary/clarifying statement X_____ Count each time the skill is used as one element	☐ 5a. Uses 0-2 elements	☐ 5b. Uses 3 elements	☐ 5c. Uses ≥ 4 elements
Notes: ICS 1.2; MK 2.1			
Exploring Patient or Family Perspective on Health ☐ Acknowledges patient verbal or non-verbal cues. ☐ Explores patient beliefs (explanatory model) or feelings ☐ Explores contextual influences: family, cultural, spiritual. Number of patient verbal / non-verbal cues_____	☐ 6a. Uses 0 elements	☐ 6b. Uses 1 element	☐ 6c. Uses ≥ 2 elements
Notes: ICS 1.2-4; PC 1.2-4; PC 2.2, 2.4; PBLI 1.			

Patient Centered Observation Form - Clinician version

Trainee name_____ Observer_____ Obsrvn#____ Date_____

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
Electronic Medical Record Use ☐ *By 10 seconds, describes reason for each screen gaze* ☐ Shares/points at screen during at least 2 visit phases (agenda setting, history, Rx / Lab review, typing AVS) ☐ Maintains eye contact / shares screen ≥ $^2/_3$ of the visit ☐ Asks patient to confirm or contribute to documentation	☐ 7a. Uses 0 or 1 elements.	☐ 7b. Uses 2 elements	☐ 7c. Uses ≥ 3 elements
*Notes: **ICS 3.1-3.4 PROF 2.3-4; SBP 3.2***			
Physical Exam ☐ Prepares patient before physical exam actions **and** describes exam findings (*"I am going to ___ " then "your lungs sound healthy"*)	☐ 8a. 0-1 exam elements (e.g., lungs)	☐ 8b. 2 exam elements (e.g., heart, lung)	☐ 8c. ≥ 3 exam elements (heart, lungs, ears)
*Notes: **ICS 1.1-3***			
Sharing Information / Patient Education ☐ Tailors to patient health literacy needs; avoids jargon ☐ Summaries cover biomedical concerns ☐ *Summaries cover psychosocial concerns.* ☐ Invites Q/A	☐ 9a. Uses 0-1 elements	☐ 9b. Uses 2 elements	☐ 9c. Uses ≥ 3 elements
*Notes: **ICS 1.3; PC 2.3 PC 4.3 MK1.1-4***			
Behavior Change / Self-Management **Clinician Asks:** ☐ *If patient wants to set a behavior change goal* ☐ *Patient to brainstorm activities to reach goal* ☐ *Patient to pick specific activity* ☐ *Patient to name activity frequency and time of day* ☐ *How will patient track effort and progress?* **Clinician offers:** ☐ *Guidance about personal, environmental or relational behavior change strategies* ☐ *Affirmations of past or current efforts*	☐ 10a. Uses 0-2 elements or lectures patient	☐ 10b. Uses 3 elements	☐ 10c. Uses ≥ 4 elements
*Notes: **ICS 1.4 PC 2.3-4; PC3.1-4; MK1.2-4;***			
Co-Creating a Plan / Shared Decision-Making ☐ Describes options to address patient concerns ☐ Discusses pros, cons and uncertainties of options ☐ Asks for patient preferences ☐ Identifies and resolves decisional differences, if any ☐ Scales confidence/feasibility to follow plan (1- 10) ☐ Assesses patient barriers to follow plan ☐ Adjusts plan to address barriers ☐ Proposes follow-up plan	☐ 11a. Use 0-2 element	☐ 11b. Uses 3-4 elements	☐ 11c. Uses ≥ 5 elements
*Notes: **ICS 1.3-5; PC1.2-4; PC2.2-4; PC3.2-; SBP 3.3; PBLI 1.3-4; MK 1.4***			
Closure ☐ Asks for questions about today's topics. ☐ Co-creates an After Visit Summary ☐ Uses Teachback. = Asks the patient to explain his/her understanding of the plan ☐ Combines Teachback and AVS creation while sharing the screen or notepad. (Counts for 3 elements)	☐ 12a. Uses 0-1 element	☐ 12b. Uses 2 elements	☐ 12c. Uses ≥ 3elements
*Notes: **ICS 1.1-2; ICS 3.1, 3.3-4; SBP 3.2***			