

# University of Washington Family Medicine Patient Centered Observation Form

Trainee name \_\_\_\_\_ Observer \_\_\_\_\_ Obsrvn# \_\_\_\_\_ Date \_\_\_\_\_

*Directions; Mark one box per row. Circling behaviors may help. Competent skill use is in the right two columns.  
Record important provider or patient comments and verbal or non-verbal cues in the notes sections. Use this form to  
enhance your learning, vocabulary, and self-awareness. If requested, use this form to guide verbal feedback to  
someone you observe.*

<b>Skill Name</b> <i>Skill Level: Best practice description</i>	<b>Provider Centered Biomedical Focus</b>	← →	<b>Patient Centered Biopsychosocial Focus</b>	
<b>Establishes Rapport</b> <ul style="list-style-type: none"> <li>• Introduces self;</li> <li>• Warm greeting;</li> <li>• Acknowledges all in the room by name</li> <li>• Uses eye contact;</li> <li>• Humor or non medical interaction;</li> </ul>	<input type="checkbox"/> 1a. Uses 0-1 elements		<input type="checkbox"/> 1b. Uses 2 elements.	<input type="checkbox"/> 1c. Uses ≥ 3 elements.
	Notes:			
<b>Maintains a relationship Throughout the Visit</b> <ul style="list-style-type: none"> <li>• Demonstrates empathy;</li> <li>• Listens well using continuer phrases and by repeating important verbal content;</li> <li>• Demonstrates mindfulness through curiosity, self-reflection, and presence;</li> </ul>	<input type="checkbox"/> 2a.  No evidence of empathy or verbal listening behavior. Disease and biomedically focused.		<input type="checkbox"/> 2b.  Evidence of empathy OR listening well OR evidence of mindfulness.	<input type="checkbox"/> 2c.  Demonstrates two of the following: verbal or non-verbal empathy; listening skills; or mindfulness.
	Notes:			
<b>Collaborative upfront agenda setting</b> <ul style="list-style-type: none"> <li>• ≥ 1 additional elicitations ("something else?")</li> <li>• Acknowledges pre-visit info from the MA or EHR.</li> <li>• Confirms what is most important to patient?</li> </ul>	<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:			
<b>Maintains Efficiency</b> <ul style="list-style-type: none"> <li>• Shared thinking about priorities, structure, and problem solving.</li> <li>• Tracks multiple topics and is organized</li> </ul>	<input type="checkbox"/> 4a.  No shared thinking about visit structure. Drawn off topic, or unorganized visit structure.		<input type="checkbox"/> 4b.  Shared thinking about priorities, visit structure, or problem solving. Simple agenda, organized interview.	<input type="checkbox"/> 4c.  Shared thinking about priorities, structure, and problem solving. Tracks multiple topics; is organized.
	Notes:			
<b>Gathering Information</b> <ul style="list-style-type: none"> <li>• Uses open-ended questions <u>along</u> with closed questions.</li> <li>• Uses reflecting, clarifying, or summarizing statements</li> </ul>	<input type="checkbox"/> 5a. Uses 0 to 1 open-ended questions. No reflecting, clarifying, or summary statements.		<input type="checkbox"/> 5b. Uses 2 or more open-ended questions OR uses one reflecting, clarifying or summary statement.	<input type="checkbox"/> 5c. Uses 2 or more open-ended question AND more than one reflecting, clarifying, or summarizing statement.
	Notes:			
<b>Assessing Patient's Perspective on Health</b> <ul style="list-style-type: none"> <li>• Investigates patient verbal and non-verbal cues.</li> <li>• Initiates exploration of patient beliefs and contextual influences: family, cultural, spiritual.</li> </ul> Number patient verbal / non-verbal cues _____	<input type="checkbox"/> 6a.  Does not acknowledge patient cues or explore patient beliefs, concerns and feelings. Does not explore contextual influences: family, cultural, or spiritual.		<input type="checkbox"/> 6b.  Acknowledges verbal / non-verbal cues about feelings or beliefs OR Responds to contextual influences described by the patient.	<input type="checkbox"/> 6c.  Investigates patient verbal / non-verbal cues OR Initiates exploration of patient beliefs and contextual influences such as family, cultural, and spiritual issues.
	Notes:			

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Observer \_\_\_\_\_

Obsrvn# \_\_\_\_\_ Date \_\_\_\_\_

<b>Skill Name</b> <i>Skill Level: Best practice description</i>	<b>Provider Centered Biomedical Focus</b>	↔	<b>Patient Centered Biopsychosocial Focus</b>
<b>Electronic Medical Record Use</b> <ul style="list-style-type: none"> <li>• <i>Transparently describes use of EMR to pt.</i></li> <li>• <i>Maintains eye contact with patient during majority of interview.</i></li> <li>• <i>Positions monitor to be viewed by patient</i></li> <li>• <i>Points to screen</i></li> </ul>	<input type="checkbox"/> 7a. Uses 0 or 1 of the four elements.		<input type="checkbox"/> 7b. Uses 2 elements
	<input type="checkbox"/> 7c. Uses 3 or 4 elements		
Notes:			
<b>Physical Exam</b> <i>Not present in every interview</i> <ul style="list-style-type: none"> <li>• <i>Prepares patient before all physical exam actions.</i></li> <li>• <i>Describes all exam findings</i></li> </ul>	<input type="checkbox"/> 8a. Does not prepare the patient before the exam or describe findings after the exam.		<input type="checkbox"/> 8b. Prepares patient for 1-3 exam actions AND describes 1-3 findings.
	<input type="checkbox"/> 8c. Prepares patient before > 3 physical exam actions AND Describes > 3 findings.		
Notes:			
<b>Sharing Information</b> <ul style="list-style-type: none"> <li>• <i>Uses language familiar to the patient.</i></li> <li>• <i>Summaries cover biopsychosocial concerns.</i></li> <li>• <i>Invites Q/A</i></li> </ul>	<input type="checkbox"/> 9a. Summaries dominated by biomedical focus. Significant use of medical jargon. No opportunity for patient Q/A.		<input type="checkbox"/> 9b. Uses language the patient can understand AND one of the following: Summarizes patient's <b>biomedical</b> concerns OR Invites Q/A.
	<input type="checkbox"/> 9c. Uses language the patient can understand AND summaries cover <b>biopsychosocial</b> concerns AND invites Q/A.		
Notes:			
<b>Behavior Change Discussions</b> <i>Not present in every interview</i> <ul style="list-style-type: none"> <li>• <i>Explores patient knowledge about behaviors that compromise health.</i></li> <li>• <i>Explores pros and cons of changing and not changing health habits.</i></li> <li>• <i>Creates a plan aligned with patient's readiness</i></li> </ul>	<input type="checkbox"/> 10a. Does not address behavior change OR lectures patient about health behaviors OR imposes a plan with no assessment of patient's readiness.		<input type="checkbox"/> 10b. Responds to patient concerns about behavior change AND one of the following: Describes only the pros of change OR the cons of not changing OR offers behavior change advice with patient permission.
	<input type="checkbox"/> 10c. Explores patient knowledge about behaviors that compromise health, explores pros and cons of changing and not changing health habits AND creates a plan aligned with patient's readiness.		
Notes:			
<b>Co-creating a plan</b> <i>Informed Decision Making</i> <ul style="list-style-type: none"> <li>• <i>Physician shares evidence(when available) behind recommendations</i></li> <li>• <i>Examines pros and cons and uncertainties of all viable options</i></li> </ul> <i>Shared Decision Making</i> <ul style="list-style-type: none"> <li>• <i>Physician offers plan respecting biomedical, psychological and social goals and values.</i></li> <li>• <i>Physician asks for patient input and if needed, modifies plan in response to patient concerns</i></li> </ul>	<input type="checkbox"/> 11a. No informed decision making		<input type="checkbox"/> 11b. Discusses one of the following: evidence; pros and cons of options; alternatives; uncertainties.
	<input type="checkbox"/> 11c. Discusses > 1 of the following: evidence, pros and cons of options; alternatives; uncertainties.		
Notes:			
<b>Closure and Follow-up</b> <ul style="list-style-type: none"> <li>• <i>Asks for questions about today's topics.</i></li> <li>• <i>Prints After Visit Summary; uses Teachback. Teachback = Asking the patient to explain their understanding of the plan</i></li> </ul>	<input type="checkbox"/> 12a. No request for questions. Does not provide written summary of plans. Does not use Teachback.		<input type="checkbox"/> 12b. Asks for questions OR one of the following: provides written summary OR uses Teachback.
	<input type="checkbox"/> 12c. Asks for questions about today's topics, provides written summary and uses Teachback.		
Notes:			