Patient Centered Observation Form

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 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 *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* ☐ *Warm greeting* ☐ *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:		
Maintains Relationship Throughout the Visit ☐ *Strong verbal or non-verbal empathy* ☐ *Listens well using continuer phrases ("um hmm")* ☐ *Repeats important verbal content;* ☐ *Demonstrates mindfulness through curiosity, self-reflection, or presence*	☐ 2a. Uses 0-1 elements	☐ 2b. Uses 2 elements	☐ 2c. Uses 3 or more elements
Notes:			
Collaborative upfront agenda setting ☐ *Additional elicitation- "something else?"- each elicitation counts as a new element* ☐ *Acknowledges agenda items from other team member (eg MA) or from EMR.* ☐ *Confirms what is most important to patient?*	☐ 3a. Uses 0-1 elements	☐ 3b. Uses 2 elements	☐ 3c. Uses ≥ 3 elements
Note patient concerns here:			
Maintains Efficiency through transparent (out loud) thinking: ☐ *about visit time use / visit organization* ☐ *about problem priorities* ☐ *about problem solving*	☐ 4a. Uses 0 elements	☐ 4b. Uses 1 element	☐ 4c. Uses 2 or more elements
Notes:			
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 0-1 elements	☐ 5b. Uses 2 elements	☐ 5c. Uses 3 or more elements
Notes:			
Assessing Patient or Family Perspective on Health ☐ *Acknowledges patient verbal or non-verbal cues.* ☐ *Explores patient beliefs 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 or more elements
Notes:			

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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 ☐ *Regularly describes use of EMR to patient* ☐ *Maintains eye contact with patient during majority of time while using EMR.* ☐ *Positions monitor to be viewed by patient* ☐ *Points to screen*	☐ 7a. Uses 0 or 1 elements.	☐ 7b. Uses 2 elements	☐ 7c. Uses 3 or 4 elements
	Notes:		
Physical Exam ☐ *Prepares patient before physical exam actions **and** describes exam findings during the exam* *("I am going to ___ " then "your lungs sound healthy")*	☐ 8a. Never	☐ 8b. some of the time, up to half the time	☐ 8c. Most of the time
Notes:			
Sharing Information ☐ *Avoids or explains medical jargon* ☐ Summaries cover biomedical concerns ☐ *Summaries cover psychosocial concerns.* ☐ *Invites Q/A*	☐ 9a. Uses 0-1 elements	☐ 9b. Uses 2 elements	☐ 9c. Uses 3 or more elements
Notes:			
Behavior Change Discussions ☐ *Explores pt knowledge about behaviors* ☐ *Explores pros and cons of behavior change* ☐ *Scales confidence or importance* ☐ *Asks permission to give advice* ☐ *Reflects or summarizes patient thoughts and feelings* ☐ *Creates a plan aligned with patient's readiness* ☐ *Affirms behavior change effort or success*	☐ 10c. Uses 0-1 elements or lectures patient	☐ 10b. Uses 2-3 elements	☐ 10c. Uses 4 or more elements
Notes:			
Co-creating a plan *Informed Decision Making (when appropriate)* ☐ *Shares evidence(when available) behind recommendations* ☐ *Describes alternative options* ☐ *Examines pros and cons* ☐ *Describes uncertainties of viable options*	☐ 11a. Use 0 elements	☐ 11b. Uses 1-2 elements	☐ 11c. Uses 3-4 elements.
Shared Decision Making ☐ *Plan respects patient's biomedical goals / values.* ☐ *Plan respects patient's psychosocial goals and values.* ☐ *Asks for patient preferences* ☐ *Asks for patient input and, if needed, modifies plan*	☐ 12a. Use 0-1 element	☐ 12b. Uses 2 elements	☐ 12c. Uses ≥ 3 elements
Notes:			
Closure and Follow-up ☐ *Asks for questions about today's topics.* ☐ *Prints After Visit Summary* ☐ *Uses Teachback. = Asking the patient to explain his/her understanding of the plan*	☐ 13a. Uses 0-1 element	☐ 13b. Uses 2 elements	☐ 13c. Uses 3 elements
Notes:			