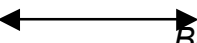# Patient Centered Observation Form- Clinician version

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.

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 ☐ *Uses verbal or non-verbal empathy during discussions or during the exam* ☐ *Uses continuer phrases ("um hmm")* ☐ *Repeats important verbal content* ☐ *Demonstrates mindfulness through presence, curiosity, intent focus, not seeming "rushed" or acknowledging distractions*	☐ 2a. Uses 0-1 elements	☐ 2b. Uses 2 elements	☐ 2c. Uses 3 or more elements
Notes:			
Collaborative upfront agenda setting ☐ *Additional elicitation- "something else?" * X_____* *each elicitation counts as a new element* ☐ *Acknowledges agenda items from other team member (eg MA) or from EMR.* ☐ *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:			
Maintains Efficiency using transparent (out loud) thinking and respectful interruption: ☐ *Talks about visit time use / visit organization* ☐ *Talks about problem priorities* ☐ *Talks about problem solving strategies* ☐ *Respectful interruption/redirection using EEE: Excuse your self, Empathize/validate issue being interrupted, Explain the reason for interruption (eg, for Topic tracking)*	☐ 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:			

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 ☐ *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. 0-1 exam elements (eg., lungs)	☐ 8b. 2 exam elements (eg, heart, lung)	☐ 8c. > 2 exam elements (eg, heart, lung, ears)
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 importance of or confidence in change (1- 10)* ☐ *Asks permission to give advice* ☐ *Reflects comments about: desire, ability, reason, need, or commitment to change (respects ambivalence)* ☐ *Creates a plan aligned with patient's readiness (see MA/nurse version of PCOF* ☐ *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 ☐ *Assesses patient preferred decision making role* ☐ *States the clinical issue or decision to be made* ☐ *Describes options* ☐ *Discusses pros and cons* ☐ *Discusses uncertainties with the decision* ☐ *Assesses patient understanding* ☐ *Asks for patient preferences* ☐ *Identifies and resolves decisional differences* ☐ *Plan respects patients goals and values*	☐ 11a. Use 0-2 element	☐ 11b. Uses 3-4 elements	☐ 11c. Uses ≥ 5 elements
Notes:			
Closure ☐ *Asks for questions about today's topics.* ☐ *Co-creates and prints a readable After Visit Summary* ☐ *Uses Teachback. = Asking 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 3 elements
Notes:			