

Clinical Encounter Evaluation

Case:	Student:
Evaluator:	Date:

Item	BE	E	AE	NE
<u>Knowledge base</u>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Completeness and Efficiency of History</u>				
Rapport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Question type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete HPI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pertinent ROS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Focused PMH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Focused FH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Focused SH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sexual History	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Summaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Exam & Ancillary Studies</u>				
Explains exam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Privacy/cleanliness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appropriate focus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maneuvers correct	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Study selection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Study interpretation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Problem Solving</u>				
Gathering data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Problem list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Differential Dx	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prioritizing DDx	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Oral Presentation</u>				
Opening Sentence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete/Focused	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conveys context	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Notes</u>				
Proper format	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Problem Solving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Patient Education</u>				
Lay terminology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accurate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short bursts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Focused	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assesses effect	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Professionalism</u>				
Dress appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respect for pt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respect for staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open to feedback	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accurate self-assess	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What went well:

What could be improved:

Skills to work on:

Brief explanation of the above descriptors:

Completeness and Efficiency of History:

1. Rapport: Use verbal and non-verbal cues to establish a comfortable relationship with the patient.
2. Question type:
 - a. Uses open questions to get patient to tell story in their own words.
 - b. Uses closed questions to cone down and get specific information.
3. Complete HPI: Gathers all information needed to form a reasonable diagnostic and management plan.
4. Pertinent ROS: Obtains + and -information from ROS that pertain to chief complaint and possible diagnosis.
5. Focused PMH, FH, SH: Obtains those aspects of PMH, FH, and SH that are pertinent to the patient's complaint(s); that help us diagnose or manage their "problems".
6. Sexual History: Obtains an appropriate and sensitive sexual history when appropriate.
7. Transitions: When needed, uses transitions in an appropriate manner.
8. Summaries: Summarizes information that was confusing or difficult to obtain.

Exam & Ancillary Studies:

1. Explains exam: Tells the patient what exam maneuvers will be done, and if appropriate why it needs to be done.
2. Privacy/cleanliness: Uses appropriate draping during exam. Washes or foams hands before and after exam.
3. Appropriate focus: Does those parts of exam which pertain to problem at hand. Does not do excessive number of unnecessary exam maneuvers.
4. Maneuvers correct: Exam maneuvers are done with proper technique.
5. Study selection: Appropriately chooses which laboratory, radiographic or other medical studies should be done for this patient.
6. Study interpretation: Properly interprets results of laboratory, radiographic or other studies for this patient.

Problem Solving:

1. Gathering Data: This differs from "Complete

HPI". Questioning demonstrates that student is considering a differential diagnosis when choosing what to ask about.

2. Problem List: Able to generate problem list and use it to form the plan.
3. Differential Diagnosis: Able to generate DDx based on clinical data that includes most likely/common diagnosis as well as less likely but "not to be missed" diagnoses.
4. Prioritizing differential: Able to use data from this patient to identify what Dx are more and less likely.
5. Action Plan: Using DDx can order appropriate tests and interpret results, suggest reasonable management and follow-up.

Oral Presentations:

1. Opening sentence: Sets the context: Age, sex, highly relevant epidemiologic factors, SH, etc; Lead the listener toward a diagnosis; Gives the "gist" of the case.
2. Organization: Follows standard format in logical progression of information.
3. Complete/Focused: Presentation contains all the important information without including unnecessary information.
4. Conveys context: Listener can get a sense of diagnostic possibilities, what the student thinks it is, how sick the patient is.

Notes:

1. Proper format: Uses appropriate format for setting including standard notations.
2. Complete: Includes all pertinent information in manner that is easy to follow.
3. Assessment: Includes a summary statement at beginning then DDx with pathophys explanations of how they relate to this pt.
4. Plan: Includes accurate plan and documents education.

Patient Education:

1. Needs assessment: Finds out what the patient knows and what they would like to know. Anticipates difficult information.
2. Lay terminology: Avoids or explains all medical jargon.
3. Accurate: Information given is truthful
4. Short bursts: Gives information in small chunks and allows patient time to process information.
5. Focused: Information given is pertinent to this patient.
6. Assesses effect: Interviewer checks in with patient to make sure s/he has understood the information and if appropriate, if s/he will be able to follow the directions or plan.

Professionalism: See Professionalism document from UMass.

1. Dress: Clothing conveys appropriate professionalism.
2. Respect for patient: Respects the rights and wishes of the patient
3. Respect for staff: Treats all staff with respect
4. Open to feedback: Accepts feedback from preceptor and discusses how to utilize it
5. Accurate self-assessment: Able to reflect on own performance and give accurate feedback to self.