APPENDIX E: Observation and Assessment Checklist

This tool is used by the trainer and provider during assessment, real-time feedback and "On-The-Fly Coaching".

Trainer completes a checklist while observing the clinical encounter. Provider completes a checklist post-encounter. Trainer and provider review and discuss any discrepancies in assessment between checklists.

Checklists can be used to structure trainers' real-time feedback and "On-The Fly Coaching" content. Trainers and providers can use the records of their observations to track provider improvement over time. These documents are also useful to ensure inter-rater reliability when multiple trainers are used.

Reference:

Braddock III C, Hudak, PL, Feldman JJ, Bereknyei S, Krankel RM, Levinson W. "Surgery Is Certainly One Good Option": Quality and Time Efficiency of Informed Decision-Making in Surgery. J Bone Joint Surg Am. 2008;90:1830-1838.

Appendix E: Observation and Assessment Checklist

CHECKLIST: Observation and Assessment

YES	NO	
		Did you discuss the patient's role in the decision-making process? **(Role)**
		Did you discuss how the decision would impact the patient's daily life? **(Context)**
		Did you discuss the essential clinical issues? **(Nature)**
		Did you discuss reasonable alternatives? **(Alternatives)**
		Did you discuss the pros & cons? **(Pros & cons)**
		Did you discuss the likelihood that surgery would/would not succeed? **(Uncertainty)**
		Did the patient demonstrate an understanding of the decision? **(Understanding)**
		Did you discuss whether the patient would like to consult others? **(Input)**
		Did you discuss what the patient preferred? **(Preference)**
		Did you ask the patient to teach back what was discussed? **(Teach Back)**

For Trainer Use:
Provider(s): _____
Observation #: _____

Reference:

Braddock III C, Hudak, PL, Feldman JJ, Bereknyei S, Krankel RM, Levinson W. "Surgery Is Certainly One Good Option": Quality and Time Efficiency of Informed Decision-Making in Surgery. J Bone Joint Surg Am. 2008;90:1830-1838.