



# PHYSICIAN STRATEGY GROUP

SERVING THE USPI PHYSICIAN NETWORK

## NURSE AND MEDICAL ASSISTANT – COACHING OBSERVATION

Date: \_\_\_\_\_ Coach/Observer: \_\_\_\_\_ Provider: \_\_\_\_\_

PROFICIENT <input checked="" type="checkbox"/>	OPENING AND INTRODUCTION	IMPROVEMENT OPPORTUNITY <input checked="" type="checkbox"/>
<b>Acknowledge</b>		
	Escorted patient from reception area	
	Greeted patient by preferred name	
	Smiled appropriately	
	Knocked before entering exam room (subsequent entrances)	
	Acknowledged and greeted other family members accompanying on visit	
	Washed or gelled hands in front of patient	
<b>Introduce</b>		
	Welcomed patient	
	Introduced self and role	
	Shared information about experience or length of time with practice	
	Managed up physician or practice with positive comments to patient	
<b>Duration and Explanation</b>		
	Reviewed purpose of today's appointment	
	Explained why current and new medications are reviewed at each appointment	
	Used easy to understand explanations	
	Avoided medical jargon and abbreviations	
	Gave specific information about time to see doctor	
	Apologized for known delays	
	Provided time updates to patient every 10 – 15 minutes when delays occur	
	Gave patient options – to wait or reschedule for lengthy delays	
<b>VITALS, HISTORY AND EXAM</b>		
	Explained what would take place and why (i.e. take blood pressure, temp, EKG, etc.)	
	Walked patient through plan for visit	
	Kept patient informed throughout visit about next steps and wait times (x-ray, tests, treatments, etc.)	
	Asked "Is there anything else I can do for you before Dr. comes in to see you?"	
<b>POST PHYSICIAN EXAM AND CLOSE</b>		
	Reviewed next steps – next appointment, surgery date, pre-op information, physical therapy and other test and treatments ordered by physician	
	Reviewed prescriptions, new medications, surgery packet, physical therapy needs	
	Provided specific detail – reason for medication or treatment and purpose	
	Engaged patient in discussion by asking questions	
	Used questions to check patients understanding	
	Asked "What questions do you have for me?"	
	Thanked patient for choosing the practice and privilege of caring for them	
	Walked or directed patient to check-out desk according to procedure	
<b>NURSE AND MEDICAL ASSISTANT COMMUNICATION SKILLS</b>		
<b>Explain things in a way that was easy to understand</b>		
	Used easy to understand words and instructions	
	Avoided medical jargon and abbreviations	
	Explained words that might be used frequently for patient's condition	



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	Checked for understanding by asking patient to explain back or the use of open ended questions	
	Used an encouraging and welcoming tone of voice	
	Used visual aids such as patient education materials when available	
<b>Listen carefully to patient</b>		
	Asked open ended questions to solicit information	
	Paraphrased the patient's information to demonstrate understanding	
	Used follow up questions to clarify ambiguous or non-specific information	
	Thanked the patient for providing detailed/specific information	
	Listened without interrupting the patient	
<b>Treat with Courtesy and Respect</b>		
	Acknowledged patient's comments and questions; thanked for detail	
	Checked understanding by paraphrasing or asking clarifying questions	
	Used tactful language and words to clarify misleading or incorrect information	
	Practiced active listening and did not interrupt patient	
	Used positive non-verbals; smile or head nodding, to acknowledge when listening	
<b>NON-VERBAL COMMUNICATION CUES</b>		
	Knocked before entering exam room	
	Maintained good eye contact	
	Smiled and presented a positive demeanor	
	Used a welcome and encouraging tone of voice	
	Listened without interrupting	
	Did not multitask and avoided distractions (phone, computer, tablet)	
	Used positive posture, sat upright, leaned forward	
	Facial and hand gestures did not come across as hurried or exasperated	
<b>COACH FEEDBACK AND RECOMMENDATIONS</b>		
<input type="checkbox"/> EXPERT COMMUNICATOR <input type="checkbox"/> PROFICIENT COMMUNICATOR		<input type="checkbox"/> REPEAT OBSERVATION