

Provider Observation Tool

Date: _____ **Time:** _____ **Setting:** _____

Reason for Visit: _____

Instructions: One audit per patient for each Provider.

General Information	Observed	Notes:
1.* Provider Name:		
2.* Observer Name:		
Pre-Visit	Observed	Notes:
3.*Did Provider review patient medical history prior to visit?	Yes No NA	
4.*Did Provider knock on door & pause before entering?	Yes No NA	
5.*Did Provider wash their hands upon entering the room & explain why? (<i>i.e. for your safety, let me wash my hands?</i>)	Yes No NA	
6. If there was a delay, Provider acknowledged the delay in seeing the patient?	Yes No NA	
Connect & Understand (<i>First Impression & Shared Agenda</i>)	Observed	Notes:
7.*Did Provider greet patient and others in room?	Yes No NA	
8.*Did Provider introduce self to patient and others in room?	Yes No NA	
9.*Did Provider write or ensure name is on the Whiteboard?	Yes No NA	
10.*Did Provider smile or use appropriate facial expression?	Yes No NA	
11.*Did Provider demonstrate good eye contact?	Yes No NA	
12.*Did Provider use patient's name?	Yes No NA	
13.*Did Provider sit at eye level, facing the patient?	Yes No NA	
14.*Did Provider explain who they are in the structure? (<i>"I am Dr. X, I am a Senior Staff Cardiology/Heart Doctor"</i>)	Yes No NA	Notes:
15.*Did Provider use open-ended questions to learn reason for visit?	Yes No NA	
16.* Did provider elicit patient's narrative, without interruption - (<i>"the nurse told me /I've seen your chart, tell me a little more about what brings you in today?"</i>)	Yes No NA	
17.*Did Provider demonstrate active listening by "paraphrasing" what patient shares (<i>i.e. medical history</i>) ?	Yes No NA	
18.*Did Provider acknowledge emotions, offer empathy and/or provide reassurance to patient?	Yes No NA	
19.*Did Provider discuss what will be done today and create a shared agenda with patient?	Yes No NA	
20.*Did Provider wash hands before exam & reiterate patient safety?	Yes No NA	
21.*Did provider, during the exam explains to the patient what he/she is doing and why?	Yes No NA	
Reveal & Relate	Observed	Notes:
22.*Did Provider share results, diagnosis or clinical impressions using language the patient can understand? (<i>Identify the main problem</i>)	Yes No NA	
23.*Did the provider explain the plan or next steps in a way the patient can understand? (<i>What and why</i>)	Yes No NA	
24.*Did Provider use "teachback" to assess patient's understanding of the problem and plan? (<i>Do they know what they are to do and why</i>)	Yes No NA	

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25.*Did Provider ask, "What questions do you have about our plan for today?"	Yes No NA	
26.*Did Provider thank the patient for letting us care for you today?	Yes No NA	
iCARE Behaviors	Observed	Notes:
27. Did Provider find an opportunity to "Manage Up" another part of the care team, department or system?	Yes No NA	
28. Did Provider use appropriate Tone of voice - (<i>i.e. speed and volume of speech</i>)?	Yes No NA	
29. Did Provider respond to patient with appropriate touch?	Yes No NA	
30. Did provider use or respond to patient with appropriate emotion (<i>i.e. compassion, empathy, humor</i>)?	Yes No NA	

Provider Strengths:

Provider Opportunities:

Next Steps/Follow Up	By When	Comments