

**History
(30%)**

Element	Misses Expectations Please leave commentary in column to the right	Proctor MUST list <u><i>detailed commentary</i></u> in this column for EVERY ROW that the student missed expectations	Meets Expectations	Exceeds Expectations
Organization and flow	Disorganized in several areas; Flow needs improvement		Organized with steady flow	Well organized; Easy to follow student's thought process and clinical reasoning through questions
Adequacy of HPI, including other necessary questions vaccines, screening tests, recent travel	Missed multiple key components		Missed few key HPI questions	Missing very few if any HPI questions
Associated symptoms Relevance to the presenting medical diagnosis and demonstrates understanding of disease process	<10 questions; at least 5 relevant		10 questions; at least 6 or more relevant	>10 questions; all relevant
Higher-order questions (ie. Follow-up questions to positive responses)	Did not ask any follow-up questions to positive responses		Asked at least one follow-up question to positive responses, however, does	Asked all appropriate follow-up questions to positive responses, including pertinent details.

			not ask most pertinent follow-up questions	
PMH PSH FH Trauma	Did not review PMH/PSH/FH/trauma		Reviewed PMH/PSH/FH and trauma Asked for any updates	
Social History (Smoking, ETOH, Drug use, diet, Exercise, sexual history, ED in males, LMP-females	Did not ask or asked only 4 items or less		Asked 5 of 7 items	Asked smoking, ETOH, Drug use, diet, exercise, sexual history, ED in males, LMP-females

Meds Details: freq, dosing, route of admin, taking as prescribed	Did not ask about medications		Asked without detail or follow-up	Asked for details
Allergies	Did not ask about allergies		Asked; may or may not have asked about all three: meds, food, and latex; lacking follow-up questions or detail	Asked about allergies for meds, food, and latex AND asked about reaction

Overall for section	Student misses expectations if they have 5 <u>or more in the misses column.</u>		Student meets expectations if they have 4 <u>or less in the misses column and/4 or less in the exceeds column.</u>	Student exceeds expectations if they have <u>none in the misses column AND 5 or more in the exceeds column.</u>
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_____ Referral to Fellow

(Note: if a student misses expectations on this entire section, this is an automatic referral to a fellow)

Physical Examination (35%)

Element	Misses Expectations	Proctor MUST list <u>detailed commentary</u> in this column for EVERY ROW that the student missed expectations	Meets Expectations	Exceeds Expectations
	Please leave commentary in column to the right			
Organization and flow (top down)	Disorganized Flow of exam		Flow of exam made sense	Exam flowed well; timely
Adequacy/ relevance of exam components for clinical reasoning	Missed several components		Missed one or less key components; additional exam	Missed no key components; exam components

	Relevant to the chronic medical Dx		techniques may or may not be relevant to the CC/chronic medical diagnosis	relevant to the cc/chronic medical diagnosis
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Osteopathic structural examination performed and integrated <u>Minimum exam</u> defined to be TART: Tissue Texture Change, Asymmetry, Range of Motion (active or passive), & Tenderness	NO or Partial TART exam (missing one or more of the four components) <u>with or without</u> extra osteopathic exam techniques		Minimum exam (defined as TART) <i>integrated or added</i> on to end of physical exam <u>with or without</u> extra exam techniques pertinent to Dx	Minimum exam (defined as TART) <i>integrated</i> into exam <u>PLUS</u> extra techniques pertinent to Dx
Basic exam technique skills (e.g. correct bracing, positioned on the right, listening posts, ladder fashion, auscultate entire cardiac and resp cycle, correct order of auscultation/palpation/percussion, etc.)	Performed 30% or more of the exam, with multiple technique errors OR Performed <50% necessary exam skills but performed them well		Performed at least 80% of the necessary exam with few errors	Performed > 90% of the necessary without errors
Explaining and instructing exam techniques to the patient for participation (including structural exam and use of exam table)	Lacks clear explanation or instruction of exam techniques; minimal or no instruction during exam		Explained clearly most exam techniques being done; instructs patient through exam most of the time	Explained clearly to patient all techniques being done; instructs patient throughout whole exam

Overall for section	Student misses expectations if they have 3 or more in the misses column.		Student meets expectations if they have 2 or less in the misses column and 3 or less in the exceeds column.	Student exceeds expectations if they have none in the misses column AND 4 or more in the exceeds column.
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_____ Referral to Fellow

(Note: if a student misses expectations on this entire section, this is an automatic referral to a fellow)

Interpersonal Communication and Professionalism (15%)

Elements	Misses Expectations Please leave commentary in column to the right	Proctor MUST list <u>detailed commentary</u> in this column for EVERY ROW that the student missed expectations	Meets Expectations	Exceeds Expectations
RED FLAGS Lack hand washing, introduction, confirming with two patient identifiers, <u>NOT</u> ensuring patient comfort & modesty, finished too early without addressing appropriate	2 or more “red flags”		1 “red flag”	No “red flags”

components, inappropriate touching				
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Summarizing/ Reviewing Hx w/Patient	Did not summarize hx before moving forward to the physical exam OR may have <i>inaccurately</i> summarized.		Summarized hx before moving forward to physical exam, however may not have been succinct.	Summarized hx succinctly before moving forward to the physical exam, using no more than 1-3 sentences.
Rapport & Relationship Building (components to look for: eye contact, body language, cadence, positive reinforcement, attentiveness, active listening, engaged, use of preferred name/pronouns, use of motivational techniques)	Minimal to no attempt to build rapport. OR Student doctor has implicit bias which negatively impacts the patient - physician relationship. <i>(If so, MUST note in the column to the right.)</i>		Attempts to build rapport on several occasions. May need refinement in technique.	Strong relationship and rapport building. Skills applied throughout the history and physical exam.
Preparation (components: appropriate and clean attire; equipment (utilizes own personal equipment, charged, ready, and able to use without difficulty)	Does not have one or more of the components listed to the left		Meets all components in the left hand column	

Maintaining physician role Sat down when taking history. Avoids looking to faculty for queuing.	Breaking role as student doctor. Standing while taking history.		Treated this as a true patient scenario.	Meets <u>PLUS</u> Answered patient questions with some detail. Comfortable with the process and no signs of breaking role.
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Findings Presents findings given for doorway sheet and cards <u>AND</u> were elicited by the student's history and physical exam	Presents information not elicited.		Presents only findings actually elicited.	Presents only pertinent information for decision making.
Overall for section (6)	Student misses expectations if they have <u>3 or more in the misses column.</u>		Student meets expectations if they have <u>2 or less in the misses column and/or 3 or less in the exceeds column.</u>	Student exceeds expectations if they have <u>none in the misses column AND 4 or more in the exceeds column.</u>

_____ Referral to Fellow

(Note: if a student misses expectations on this entire section, this is an automatic referral to a fellow)

Clinical Reasoning (20%)

Element	Misses Expectations	Proctor MUST list <u>detailed commentary</u> in this column for EVERY ROW that the student missed expectations	Meets Expectations	Exceeds Expectations
	Please leave commentary in column to the right			

Primary Dx for this Visit/Working Diagnosis; must include status of Primary Dx: stable, unstable, controlled or uncontrolled, or resolved Supports <u>MUST</u> include 2 items from history and 2 items from physical	Primary/Working Dx incorrect OR Correct status of and Primary /Working Dx given, however, without supporting information		Primary/working Dx given with correct status of disease process; AND provided supporting information	Primary/ Working DX given with correct status of disease process with MORE than minimum supporting items from the history and PE
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Secondary Diagnoses Must include Somatic Dysfunction and Health Promotion and Disease Prevention (HPDP)/USPSTF recommendation	No secondary dx provided OR Did not provide either Somatic Dysfunction or HPDP/USPSTF screening or Vaccine recommendation as Secondary Dx		Provided at least one HPDP/USPSTF screening or vaccine recommendation, in addition to a Somatic Dysfunction secondary Dx	Provided more than one HPDP/USPSTF screening exam or vaccine update recommendation or one HPDP/screening plus one or more vaccine update AND Somatic Dysfunction
Treatment plan for Working Dx Includes: meds, labs, imaging/diagnostics, OMM, education, follow-up/referral Secondary Dx: appropriate treatment plan- not all components required	Treatment plan for working dx not cohesive for the diagnosis; missing no more than 3 components; diagnostic tests not supported/justified.		Working Dx- Included at least 4 or more components for treatment plan but may not be detailed. Should provide reasoning for most diagnostic tests ordered AND included Secondary Dx- necessary components	Working Dx Treatment plan has all 6 components that are correct, detailed, and justified AND included necessary components of treatment plan for Secondary Dx

OMT	No OMT in plan		OMT is in the plan, may or may not be specific to findings.	Specific OMT treatments identified to match specified somatic dysfunctions and incorporate more than one technique.
Patient Education	Gave 2 or less non-specific items of patient education		Gave 3 items of patient education and at least 2 items should be specific to the case	Gave 3 or more items of patient education and at least 3 items should be specific to the case

Recognition of urgency and potential patient harm	Unaware of patient diagnostic urgency (if appropriate for the case); Wrong treatment and would harm the patient.		Recognized urgency of case (when appropriate); Wrong treatment but would not harm the patient.	Had an appropriate plan for urgent cases.
Presentation Completed in time allotted	Incomplete presentation in time allotted.		Complete presentation in time allotted.	Detailed and complete presentation in time allotted.
Basic understanding of presentation process	Disorganized presentation.		Orderly presentation.	Presentation exceeds expectations in content and skill.
Terminology (for presentation to faculty)	Used mostly layperson terminology instead of medical terms		Used layperson terminology sparingly and primarily used medical terms	Used no lay terminology and focused on medical terms

Overall for section	Student misses expectations if they have <u>4 or more in the misses column.</u>		Student meets expectations if they have <u>3 or less in the misses column or 5 or less in the exceeds column.</u>	Student exceeds expectations if they have <u>none in the misses column AND 6 or more in the exceeds column.</u>
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_____Referral to Fellow

(Note: if a student misses expectations on this entire section, this is an automatic referral to a fellow)

History overall: _____

Physical overall: _____

Interpersonal Communication and Professionalism overall: _____

Clinical Reasoning overall: _____

Total overall: _____