

Mini CEX Observation Checklist

STR: _____ **R1 or R2:** _____
Date: _____

Check off behaviors that are observed during the encounter:

COMMENTS

A. Medical Interviewing skills:

- 1. Facilitates patient's telling of the story by:
 - Use of open-ended questions
 - Use of facilitative comments
 - Use of appropriate non-verbal encouragement
- 2. Asks appropriate follow up questions
- 3. Actively listens to patient's responses
- 4. Explores patient's perspective of illness

B. Physical Examination Skills

- 1. Performs PEX maneuvers appropriate for history
- 2. Performs maneuvers correctly
- 3. Performs PEX in logical sequence

C. Professionalism

- 1. Uses empathic communication techniques effectively
 - Naming/acknowledging emotions
 - Understanding or legitimizing emotions
 - Praising/Respecting behaviors or situations
 - Supporting the patient (e.g. we're here for you)
- 2. Avoids judgmental responses or behaviors
- 3. Attends to patient's level of comfort and modesty
- 4. Demonstrates sensitivity to needs for confidentiality
- 5. Addresses needs of family members, if present, while maintaining primacy of patient's needs
- 6. Demonstrates respect for patient autonomy and right to make decisions about care

D. Clinical Judgment

- 1. Applies medical knowledge appropriately
- 2. Synthesizes gathered data appropriately to formulate rational differential diagnoses, and/or priorities for management
- 3. Acknowledges areas of uncertainty
- 4. Formulates sound diagnostic plan
- 5. Formulates sound therapeutic plan

E. Counseling skills

Information sharing

- 1. Uses techniques to facilitate patient understanding when sharing information
 - Assesses patient's starting point in terms of understanding of issues
 - Gives information in manageable chunks
 - Checks for patient's understanding repeatedly
 - Repeatedly asks if patient has questions
 - Summarizes and repeats as needed
- 2. Avoids use of jargon

Negotiation

- 3. Incorporates patient's opinions, perspective and/or limitations in negotiating plan of action
- 4. Suggests plans rather than directs
- 5. Delineates options and rationales
- 5. Inquires about patient's assessment of his/her ability to follow the plan
- 5. Enlists other resources ancillary services effectively

F. Organization and Efficiency

- 1. Sets an agenda for the visit with the patient
- 2. Uses summary and transitional statements to move from one section of the encounter to the next(signposting)
- 3. Outlines a plan for addressing future issues if time is constrained

COMMENTS