

Family Medicine

THE OFFICIAL JOURNAL OF THE SOCIETY OF TEACHERS OF FAMILY MEDICINE

Appendix A: Observed Practice Activities

Week 1

Student should accompany provider into patient rooms until skills are demonstrated-i.e. not seeing patients alone yet

1. Add practice preferred order list to student order (preference) lists
2. Adopt a smart phrase or note template from preceptor to write notes
 - a. Write a minimum of **one note each half day** using EMR template
 - b. Preceptor should use note and edit as needed
 - c. Student should note role as scribe in the template (Mary Jane served as scribe for Dr. Jones)
3. See patients with the provider and create visit summaries (AVS) for at least **one patient per half day**.
4. Use search function, internet, or UpToDate to pull standard education material into AVS (clinical summary)
5. Give patient the AVS and use TEACH BACK to make sure patient understands the directions
6. Practice several brief counseling techniques with patients and record your counseling video sometime during the first 5 weeks
7. Meet practice manager/QI lead/preceptor and discuss quality metrics used by the practice and gaps in quality that might be good targets for improvement. Ask for data that shows practice current performance.

Week 2

Student should accompany provider into patient rooms until skills are demonstrated

1. Demonstrate the use of the **EMR** to enter/update meds, problem list, social and family history while preceptor obtains pertinent information from patient.
2. Demonstrate use of note template in **write note for provider while he or she interviews the patient (minimum 3 per day)**
3. Continue to **do AVS for a minimum three patients per half day**
4. Examine a child's ears using proper positioning and technique with otoscope
5. Using the CDC chart, determine which vaccines a patient needs
6. If there was a student in your practice previously, review sustainability document as you plan PDSA
7. Meet with practice manager/QI lead/preceptor to discuss quality improvement project and decide on first PDSA cycle

8. How will be the metric you chose be affected by your proposed first PDSA.

Week 3

Student should accompany provider into patient rooms until skills are demonstrated. If demonstrated, can begin to see on their own.

1. Demonstrate the use **pre-visit planning for a minimum 3 patients** per half days to assess need for preventive measures including vaccine, cancer screening, or blood work- Share with provider
2. And use EMR or paper notes to remind yourself about orders/issues needed to be addressed at that visit
3. Demonstrate competency with EHR
4. Use shared decision making to discuss pros/cons of a screening test and document in your note
5. If possible, begin to enter orders for your attending to sign
6. Use a BMI calculator and [CDC BMI chart](#) and identify whether your pediatric or adult patients have a healthy BMI or not
7. Demonstrate knowledge of a well child check by performing two well child checks per week minimum
8. Make and show process map to all stakeholders and invite them to contribute ideas/participate
9. Find one to two stakeholders (nurse/doctor or front desk/doctor, yourself) willing to pilot your new process over a one day period and adjust PDSA as needed.

Week 4

Student should see patients with acute complaints alone and accompany provider into patient rooms for other patients (try to see at least 3 total in a half day combined)

1. See at least **two patients alone** with new complaints each day.
2. Use pre-visit planning to evaluate previous problems and potential for impact on chief complaint
3. Write any needed orders for the acute care visits
4. Orally present 2 acute care patients in PROBLEM Based Format at bedside (this might include past problems and how they are affected)
5. Write notes for the acute care patients that include differential diagnosis, clinical reasoning, diagnostic, therapeutic, and patient education plans
6. Scribe for at least two patients a day for the attending (see 2 on your own and 2 with the attending so writing a total of 4 notes in a full day)
7. Deliver anticipatory guidance about discipline or behavior
8. Begin data collection over 1-2 days on PDSA and discuss challenges with practice manager/QI lead/preceptor (this may be as simple as discussing a handout with a patient or making calls to patients to see how they are received).

Week 5

Student should see at least three patients each half day, each with at least one chronic illness.

1. Pre-visit planning for 2 patients with multiple chronic illnesses
 - a. Identify previous provider visit
 - b. Identify other providers seen, ED visits, or hospitalizations since last seen
 - c. Demonstrate ability to identify patient concerns (first priority)
 - d. Demonstrate ability to identify appropriate follow up for chronic diseases (i.e. A1c needed, or foot exam)
 - e. Demonstrate ability to identify needed health maintenance
2. Write notes for 2 patients in each of your clinical half days
3. Perform and demonstrate proper diabetic foot exam on an adult patient
4. Chart growth parameters for a child (weight, height, head circ, BMI depending on age) in either the EMR or on paper
5. Show data to QI lead/preceptor/Practice manager and consider what has been learned, what changes are still needed, make the changes and continue data collection. Share data with all stakeholders to build momentum

Week 6

1. Demonstrate ability to efficiently see **at least 2** patients with chronic illnesses in each half day
2. Orally present both of these patients efficiently
3. Demonstrate ability to write effective and efficient notes for those patients
4. Demonstrate ability to present patients in problem based format
 - a. Problem list presentation
 - b. Incorporate HM as a problem
 - c. Begin with most serious problem in presentation
 - d. Interpret history, don't just act as reporter
5. Have at least one physical exam skill observed (or done together) by the preceptor on each patient you see who needs an exam(kids and adults)
6. Use a website to learn how to use inhalers correctly (Advair discus, Symbicort, Spiriva, albuterol MDI, pulmicort Flexhaler).
7. Teach a patient how to use an inhaler after identifying the correct one
8. Review an action plan with a patient
9. Perform a lung exam on a child (ideally with some abnormal finding). Be able to distinguish between stertor, stridor, and wheezing.
10. Share initial data and discuss with Practice manager/QI lead/preceptor and consider patient perspective in your project

Week 7

1. Demonstrate ability to use clinical decision support tools while seeing patients (i.e. risk calculators, up to date, ACIP, PHQ 9 etc)
2. See three patients per half day and perform all functions necessary to do it well
3. Demonstrate efficient/focused history taking
4. Find at least one patient who you can follow to a subspecialty visit or procedure and advocate for that patient during that visit. (i.e. bring your history or share your preceptors concerns about patient)

5. Demonstrate use of PHQ 9 and/or GAD 7
6. Interpret tool above and discuss how you treat a patient you diagnose with depression/anxiety.
7. Demonstrate ability to do cardiac exam on a patient (including JVD)
8. Use an ADHD evaluation tool (Vanderbilt or other)
9. Begin cycle 2 of the PDSA (rework your sheet) and discuss data collection with the practice manager/leader

Week 8

1. Demonstrate the necessary components of a post hospital visit
2. Demonstrate the use of a checklist or note template in a post hospital follow up visit
3. Demonstrate knowledge of the perils of the transition period in that visit and discuss with your attending
4. Spend half a day with a care manager or social worker-if not available contact Julie Golding (SDLF)
5. Consult a home health service regarding your patient
6. Visit a psychologist/psychiatrist with your patient or spend a day with the ACT Team (SDLF)
7. Discuss when and when not to call Child Protective Services
8. Demonstrate understanding of communications/team/culture issues for patients moving from doctor to doctor and discuss with preceptor
9. Follow patient to the hospital or ED and discuss with your preceptor hospital course- PICK UP PHONE AND communicate with inpatient team or a consultant

Week 9

1. Demonstrate knowledge of symptoms consistent with pneumonia
2. Demonstrate advanced physical exam techniques for diagnosing pneumonia.
3. Demonstrate physical findings that can differentiate CHF from lung process
4. Demonstrate knowledge of physical findings in Atrial fibrillation
5. Demonstrate the use of the CHADs2 or CHADsVASC score for determining who needs anticoagulation
6. Demonstrate the concept of a dry weight in determining correct therapy for CHF
7. Describe a rash in a child using proper terminology
8. Analyze data collected so far (study phase of PDSA) and plan for next steps
9. Create run charts for data to date

Week 10

1. Demonstrate knowledge of when screening should be done for lipids, TB, diabetes, osteoporosis (i.e. test characteristics and individual risk)

2. Demonstrate understanding of advanced directives and power of attorney discussions and when they should be employed.
3. Perform a neuro and musculoskeletal exam on a child (ideally with CP or hypotonia or gross motor delay)
4. Reflect on what you have learned from your QI project and create a slide show
5. Present the outcomes to the practice at a practice meeting-explain relevance to the them, their workflow, the overall metrics in next 1-2 weeks

Week 11

1. Demonstrate use of the Frax calculator to determine use of therapy for a patient
2. Demonstrate knowledge of when to order a bone density test
3. Demonstrate understanding of risk factor modification in disease prevention for fractures
4. Demonstrate the use of a CV risk calculator to determine need for a statin or aspirin
5. Perform a HEADDSS assessment on an adolescent
6. Demonstrate use of RAAPS and/or PSC for an adolescent
7. Devise next PDSA cycle-try to spread it to more providers/nurses.
8. Discuss with practice manager obstacles and education of stakeholders

Week 12

1. Demonstrate knee exam
2. Demonstrate lower extremity neuro exam
3. Demonstrate shoulder exam
4. Perform a musculoskeletal exam on a child and discuss with preceptor
5. Discuss with practice manager second cycle and data collection
6. Consider what the next student. will need to build on your work (even if you were unsuccessful)

Week 13

1. Identify and visit a community senior center or adult day facility like PACE or Charles house (SDLF)
2. See socially complex patient and demonstrate appropriate use of the community resources for this patient
3. Demonstrate the use of a minicog in an elderly patient
4. Demonstrate the evaluation of a patient who has fallen if you haven't already
5. Discuss the differential diagnosis for one of the common acute illnesses in handout
6. Begin to develop your sustainability plan for your QI project and begin to fill in the sustainability document

Week 14

1. Demonstrate knowledge of common signs of dehydration
2. Demonstrate physical signs that indicate higher levels of care are needed for an outpatient

3. Perform an abdominal exam (ideally on patient with findings) and discuss with preceptor
4. Identify community resources for your pediatric patients
5. Finish sustainability document and give to all stakeholders to review and sign. Discuss with next student at the Intensive Integration Course

Week 15

1. Turn in the sustainability document and label it by practice/student name. Leave a copy with the practice manager and the physician lead.

Week 16

- Study for your shelf
- Ask for summative feedback for your performance
- Ask for one thing you can improve
- Ask for one thing you did well
- Give feedback to the preceptors with whom you worked in the same way