

Observation and Feedback Worksheet for Clinicians and Trainees

Anticipate Chart review/team communication? EMR/data review? Agenda? Participants? Patient capacity/information preferences?	Summarize Could pt/surrogate provide a summary? Was there agreement and shared understanding of situation(s)? Misconceptions?
Concern-share Who expresses concerns? Was there a main concern or category of concerns? Affective vs Informational?	Explore Values? If a trial of treatment is proposed, what is the goal? Decision aides? Understanding impact? Plan recommended?
Next Steps Negotiation/homework? What is the plan and why? Follow up, timelines and accountability, sign posts? Plan B?	Debrief & Document Was there a recap? AVS? Resources given? How is the visit information to be shared with team/care partners?