

What's New in New Innovations

Using the existing mobile app...

New on demand form available:

- Title: **“Active Assessment Using Direct Observation”**
- **Must be set up by your coordinator/administrator prior to use**
- Meant for both inpatient and outpatient use
- Maps to Outcomes and can be mapped to Sub-competencies
- Can use with all or part of an encounter
- Uses entrustment type of rating scale
- Incorporates feedback using a standardized feedback model
- New Outcomes based report will be available starting in June

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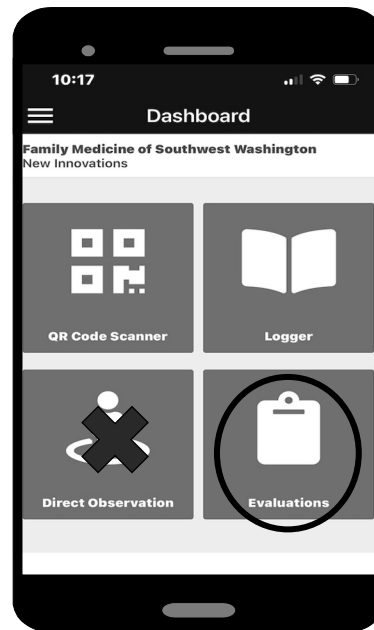
Tips for users:

- Make sure you have the most updated version of the app.
- Double check you have wifi or a good cellular connection before each use if possible.
- Login to the site at the beginning of the day so it's ready to go when you are.
- Remember you only are required to complete Question 1 and at least 1 more.
- If you only observe a portion of the visit, only choose the questions that apply.
- We recommend always completing the feedback portion at the end. (Questions 12-14)
- You can voice text any comments on any section.

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Home Page

- **No not use the Direct Observation Button**
It is for a different use and is not associated with the Outcomes
- The recommended direct observation tool that has been created to address Outcomes is under **Evaluations**.



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Learner or Evaluator Initiated

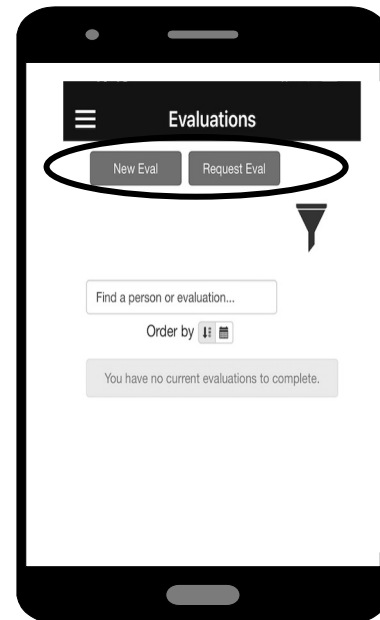
The evaluation can be initiated by either the resident or faculty, if set up correctly.

New Eval:

- For Faculty: click new Eval if you want to evaluate a resident or peer.
- For Residents click new Eval if you want to evaluate a faculty member or peer.

Request Eval:

- Resident or faculty can choose.
- Click request eval if you want to send an email to someone to complete for you.
- Will be more accurate if done in the moment.



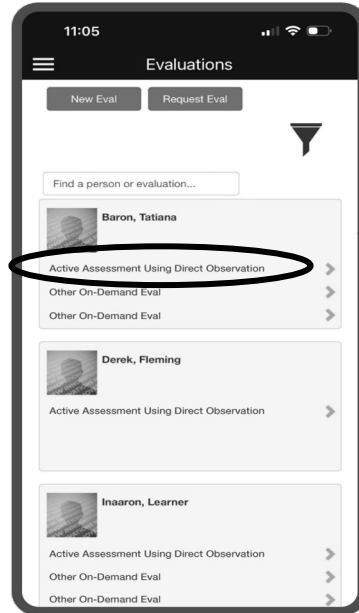
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Choose the Correct "Form"

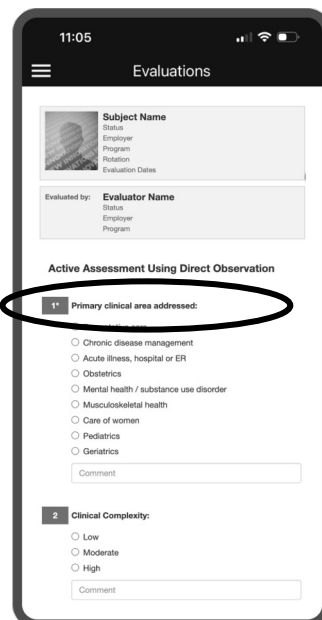
Choose the tool called: **Active Assessment Using Direct Observation** under the name of the resident. Resident names are in alphabetical order.



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Question 1: Primary Clinical Areas (choose 1)

- Preventative Care
- Chronic Disease Management
- Acute illness, hospital or ER
- Obstetrics
- Mental Health/Substance Use Disorder
- Musculoskeletal Health
- Care of women
- Pediatrics
- Geriatrics



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Question 1

- Choosing which clinical area is best addressed during the observed encounter will help determine which Outcome the remaining questions will be automatically mapped to.

Question 1 Information:


- We recognize that most encounters in Family Medicine are likely to involve more than one area. For effective reporting, only one can be chosen at a time.
- If multiple areas were covered, you could create more than one evaluation for the same complicated encounter, but we recommend only choosing one per encounter for focus.
- It is recommended to maintain a log of what has been observed per resident to help target areas not already addressed. This can be done as a whiteboard in the precepting room, by the resident themselves, or by running a report in New Innovations.

How the questions map to the Outcomes

Outcomes	Assessment for Direct Observation Questions:
1. Practice as personal physicians, providing first-contact access, comprehensive, and continuity care , to include excellent doctor-patient relationships , excellent care of chronic disease , routine preventive care and effective practice management	All questions if Preventative Care or Chronic disease management are checked in Question 1
2. Diagnose and manage acute illness and injury for people of all ages in the emergency room or hospital	All questions if Acute Illness is checked in Question 1.
3. Provide comprehensive care of children , including diagnosis and mgt of the acutely ill child and routine preventive care	All questions if Pediatrics is checked in Question 1.
4. Develop effective communication and constructive relationships with patients, clinical teams, and consultants	3, 4,6, 9, 10
5. Model professionalism and be trustworthy for patients, peers, and communities	11 12-14 (Feedback Summary)

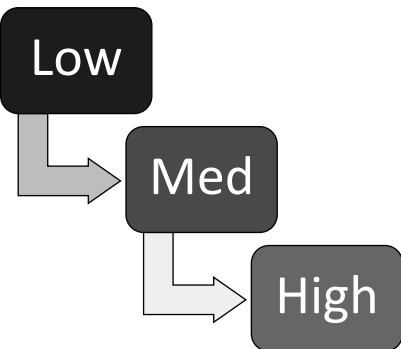
Outcomes	Questions:
6. Practice as personal physicians, to include care of women , the elderly , and patients at the end of life , with excellent rate of continuity and appropriate referrals .	All questions if GYN or Geriatrics is checked in Question 1.
7. Provide care for low-risk patients who are pregnant, to include management of early pregnancy , medical problems during pregnancy, prenatal care, postpartum care and breastfeeding, with or without competence in labor and delivery.	All questions if OB is checked in Question 1.
8. Diagnose and manage of common mental health problems in people of all ages.	All questions if Behavioral Health/SUD is checked in Question 1.
9. Perform the procedures most frequently needed by patients in continuity and hospital practices.	Not directly addressed in this form.
10. Model lifelong learning and engage in self-reflection .	12 and 14

Outcomes	Questions:
11. Practice as personal physicians, to include musculoskeletal health , appropriate medication use and coordination of care by helping patients navigate a complex health system.	All questions if MSK checked in Question 1.
12. Provide preventive care that improves wellness, modifies risk factors for illness and injury, and detects illness in early, treatable, stages for people of all ages while supporting patients' values and preferences.	All questions if Preventative care is checked in Question 1.
13. Assess priorities of care for individual patients across the continuum of care—in-office visits, emergency, hospital, and other settings, balancing the preferences of patients and medical priorities.	8
14. Evaluate, diagnose, and manage patients with undifferentiated symptoms, chronic medical conditions, and multiple comorbidities.	4,6,7
15. Effectively lead, manage , and participate in teams that provide care and improve outcomes for the diverse populations and communities they serve	9

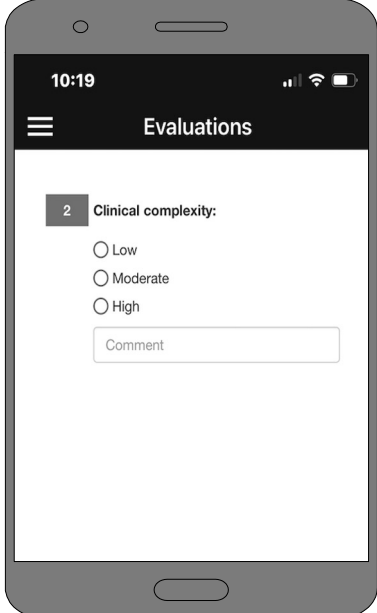
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Clinical Complexity



Question 2:
This screen is optional, but provides some clarity on the level of complexity the resident is seeing when observed.



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Questions 3-11

Question Headings

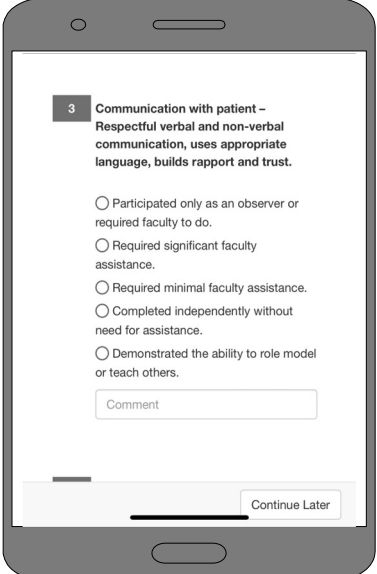
3. **Communication with patient**
4. **Effective Data Gathering**
5. **Appropriate Physical Exam**
6. **Differential diagnosis**
7. **Management plan**
8. **Teamwork**
9. **Time Management**
10. **Professionalism**

- These questions are all optional
- Should be answered based on which portions of the encounter were actually observed.
- If you only observed the history, you might only address Communication and Effective Data Gathering for example.
- If time allows, you might also comment on Time Management and Professionalism.
- Differential diagnosis and Management Plan can be answered as part of precepting using a model such as SNAPPS and does not have to be observed within the patient encounter.

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Question 3-11

- This is a screenshot of Question 3 as a reference
- Question 3-8 are all in the same format
- These questions all use an entrustment type of rating scale.
- All these questions are optional to answer.
- All have an option to comment using voice to text.



3 Communication with patient -
Respectful verbal and non-verbal
communication, uses appropriate
language, builds rapport and trust.

Participated only as an observer or
required faculty to do.

Required significant faculty
assistance.

Required minimal faculty assistance.

Completed independently without
need for assistance.

Demonstrated the ability to role model
or teach others.

Comment

Continue Later

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Feedback Summary (Questions 12-14)

12. Summarize resident's thoughts about the visit.
13. Summarize what the resident did well, and what could be improved for next time. Discuss your observations, "I observed..." and what effect they had on the patient's care.
14. Plan together next steps, reinforcing pearls and recommending further study or prep needed.

Questions 12-14 Tips:

- Most important section!
- Direct feedback is recorded here
- Allows the resident perspective to be added
- Useful as a reference for giving summative feedback later
- Use voice to text during or after feedback
- Prompts are embedded to facilitate consistent feedback.

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The End!

- Please have your administrator reach out to New Innovations if you are having any trouble making this work as expected.

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