

# Introduction to the Clerkship Direct Observations of History Taking and Physical Examination Skills

*Academic Year 2024-2025*

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## Introduction

Direct Observations (DOs) in the clerkships are designed to provide you with opportunities to demonstrate your history taking and physical examination skills in an observed setting. You are also expected to demonstrate important interpersonal skills related to history taking and physical examination in any patient encounter. The ultimate goal of these exercises is to provide you with formative and summative feedback on these skills identified by the clerkship director as critical to their particular field/discipline. Feedback is critical in every stage of development for a physician and we encourage you to use this chance to hone your clinical skills and also your ability to receive feedback thoughtfully.

## General Information

- All encounters will occur at the Morchand Center on the 13th floor of Annenberg.
- All encounters are in-person with standardized patients (SPs) and/or part-task simulators.
  - You should treat all encounters with standardized patients (SPs) with the same respect, empathy, and concern that you would have with real patients.
- We expect professional behavior with the staff in the Morchand Center.
- Consumption of any candy, food, or gum in the Morchand Center is strictly prohibited.
- You will receive email notifications of the time and date of your DO from the Clerkship Coordinator.
  - Time slot assignments may change. Please check your email frequently.
  - There will be NO RESCHEDULING of late arrivals. You must arrive at your designated arrival time.
- Masking guidelines are aligned with [Mount Sinai Health System Guidelines](#) for the hospital/clinical setting.

## What to Expect at the Morchand Center

### *Prior to Arrival at the Morchand*

- You will receive access to an ORIENTATION VIDEO shortly before the program.
  - The orientation video should be watched, in full, prior to your assigned arrival time.
  - Linked for review, at the end of the video, is the ISMMS Academic Integrity Policy.
  - As this policy governs all assessments, a digital honor code attestation is no longer required.

### *Orientation*

- The Proctor will meet you for your ON-SITE orientation in the location indicated in the email.
- Please give the Proctor your full attention during orientation (no cell phone usage, etc.).
- The Proctor will also be providing you with a letter badge to be worn outside of your coat. Make sure your letter badge can be clearly seen at all times.
- Wear your white coat and bring a pen.

- The diagnostic tools you are required to bring depends on the clerkship DO as indicated below.
  - Ambulatory Care-Geriatrics: Stethoscope
  - Inpatient Medicine: Stethoscope
  - Neurology: None
  - Obstetrics and Gynecology: None
  - Pediatrics: None
  - Psychiatry: None
  - Surgery-Anesthesiology: None
- You will be provided clipboards and paper in case you want to take notes. Any other necessary equipment to complete any of the physical examination tasks (including Snellen card and access to a clock with seconds hand) will also be provided by the Morchand Center.

#### *Exam Room Set-Up*

- Upon arrival at the Morchand Center, your personal items, textbooks, study materials, phones, and smart watches with audio or video recording capabilities will be safely stored for you.
- When the encounters are over you will take all your belongings with you.
- Both of your DO encounters will be captured via the audio/visual equipment inside the exam room.
- DO NOT CLICK anything on the computers outside of your assigned exam room unless specifically told to do so by the Proctor. Doing otherwise will cause technical difficulties and significant delays.
- We are accommodating camera angles, so please sit on the stool provided and DO NOT MOVE it around.
- There is no write-up, so you do not have to take notes. If you do take notes you must leave them in the room at the end of your encounters (EXCEPTION: Medicine DO has write-up, please see instructions at end of Medicine Direct Observations Document)

#### *Format and Timing of Encounters*

- 10-minute encounter with SP (or part-task simulator if applicable).
  - You will receive a 5-minute warning prior to the end of the encounter.
- 15-minute waiting period while SP completes checklist.
- 10-minute in-person feedback with SP.
  - You will receive a 2-minute warning prior to the end of the feedback session.
- You will complete the cycle above for both the history taking and physical examination portions of your DO, with the exception of Pediatrics.

#### *Feedback Format*

- After each encounter, the SP will review your video and complete a paper checklist prior to delivering feedback.
- During feedback, the SP will meet with you to discuss concrete skills that were expected of you as well as their experience of empathy, concern, and respect from the perspective of a patient.
- For any discrepancy in the SP feedback and your recollection of your performance, please let the SP know and it will be noted for review.
- All encounters are recorded on video and available for the faculty to review.

#### *Required Video Review*

- The Clerkship Director (CD) alerts Aaron Yellin and Meghan Green ([aaron.yellin@mssm.edu](mailto:aaron.yellin@mssm.edu), [meghan.green@mssm.edu](mailto:meghan.green@mssm.edu)) to the need for remediation and confirms you have been notified.
  - If you require remediation, you must review your encounter video(s).

- Aaron schedules video review and remediation encounter(s) directly with you.
- Video review is scheduled for the soonest possible date.
- During video review, you complete the [DO Self-Assessment Form](#).
  - If video review is required, you *must* share your form with your CD.

#### *Elective Video Review*

- You should send an email to [themorchandcenter@mssm.edu](mailto:themorchandcenter@mssm.edu), addressed to Aaron Yellin.
- The [DO Self-Assessment Form](#) will be provided, but completing is optional.

NOTE: Video review is not to be used for score adjustments as these requests must be made immediately after the exam when you receive verbal feedback from your SP.

# Inpatient Medicine Direct Observation of History Taking Skills

## Learner Expectations

**Scenario:** You will be asked to interview a patient who presents to the emergency room with a problem. (note: this is a different patient from the SP on whom you will perform a physical for the direct observation of physical exam skills, below)

**The student is expected to demonstrate the following behaviors:**

- Setting the stage/preparation
  - Student reviews the presenting scenario and the patient information prior to the encounter
- Greeting the patient/Establishing initial rapport
  - Student introduces self using first and last name
  - Student states their current level of training as a medical student
  - Student states the primary purpose of the encounter
  - Student actively verifies the patient name and date of birth
- Initiating information gathering
  - Student asks the presenting problem or reason for the patient to present to the care site
  - Student asks the onset of the presenting problem
  - Student asks about how the problem has impacted their life
  - Student asks about severity of the problem
  - Student asks about precipitating and palliating factors
  - Student asks about prior occurrence of presenting problem
- Exploring biomedical perspective of disease including relevant background and content
  - Student asks about at least 6 critical symptoms associated with presenting problem. There are 6 specific symptoms relevant to the patient's presentation that will be scored.
  - Student asks about at least 2 key behaviors/history relevant to presenting problem. There are 2 specific behaviors relevant to the patient's presentation that will be scored.
  - Student asks about relevant medications
  - Student asks about relevant medical history
  - Student asks about relevant family history
  - Students asks at least 4 social history questions relevant to the presenting problem. There are 4 specific social history items relevant to the patient's presentation that will be scored.
- Exploring patient's perspective of illness
  - Student demonstrates respect towards patient through behaviors, words and demeanor
  - Student demonstrates empathy towards patient through behaviors, words and demeanor
  - Student acknowledges feelings, concerns and anxieties of patient by verbally recognizing and legitimizing them
- Closing the encounter
  - Student directly asks for any additional questions or concerns the patient may have
  - Student explains the diagnostic possibilities to patient
  - Student explains the work-up to the patient
  - Student provides appropriate offer of support for modification of any risky behavior(s) identified
  - Student verbalizes appropriate wrap-up and reference to next steps

## Medicine Direct Observation of Physical Examination Skills

### Learner Expectations

**Scenario:** You will be asked to perform a physical examination on a patient presenting to the emergency room (note: this is a different patient from the SP you will interview for the direct observation of history taking skills, above)

**Note:** *Do not examine the patient over the gown. Physical exam maneuvers performed over the gown will result in partial or no credit for the item.*

**The student is expected to demonstrate the following behaviors:**

- Greeting the patient/Establishing initial rapport
  - Student introduces self using first and last name
  - Student states the primary purpose of the encounter
  - Student actively verifies the patient name and date of birth
  - Student washes hands before the physical examination
- Cardiovascular Exam
  - Student measures jugular venous pressure
  - Student auscultates heart in areas specific to the 4 heart valves (aortic, pulmonic, tricuspid, mitral), both sitting up and lying down
  - Student palpates PMI
  - Student palpates both lower extremities for edema
- Pulmonary Exam
  - Student assesses patient for clubbing OR cyanosis
  - Student assesses posterior chest for expansion (both sides using hands or palms; must ask patient to take a deep breath)
  - Student assesses posterior chest for tactile fremitus (compares both sides using hands or palms; checks at least 3 levels)
  - Student percusses posterior chest (checks both sides; checks at least 3 levels)
  - Student auscultates posterior chest (checks both sides; auscultates at least 3 levels; asks patient to take deep breath)
  - Student auscultates anterior chest (checks both sides; auscultates at least 2 levels; asks patient to take deep breath)
- Draping
  - Student utilizes proper draping of the patient during the physical exam
- Closing the encounter
  - Student washes hands after the physical examination
  - Student shows consideration for patient comfort by active inquiry

## Direct Observation Assessment and Plan (DOAP) Student Instructions

***You are REQUIRED to read this entire document prior to completing the Direct Observation (DO) and the Direct Observation Assessment and Plan (DOAP) assignment.***

### **Objectives:**

The DOAP is an assignment that is designed to assess your clinical reasoning skills based on the information you obtained during the history portion of your Direct Observation (DO) which takes place at the Morchand Center. You will be asked to synthesize the critical elements of your standardized patient's presentation, identify the most likely diagnosis, and provide at least two alternative diagnoses that are on the differential for the patient. You will also be asked questions regarding next steps in management.

### **During your encounter with the standardized patient for the History encounter:**

- You will be provided with a pen and paper for note taking and are encouraged to take handwritten notes on the information the SP gives you.
- The paper will have YOUR NAME pre-printed on the top.
- After the encounter is over, you will NO longer be able to take notes.
- You will receive feedback from your standardized patient on your performance. This will include a review of items you may have missed.

### **When you leave the Morchand Center for the day:**

- After you have completed your History and Physical Exam encounters at the Morchand Center, you will exit the Morchand Center.
- You will only be allowed TWO HOURS from the time you leave the Morchand Center to use your handwritten notes.
- If the DOAP assignment has not yet been released on Blackboard, you will have TWO HOURS from the release time.
- You should find a private place nearby to use your notes to complete the DOAP on your personal computer.
- Note that this is an INDIVIDUAL assignment and collaborating with any other person on the assignment is strictly prohibited.
- **Once your DOAP is completed, return the handwritten notes with your name pre-printed on the top to the locked drop box located outside the entrance to the Morchand Center. Even if you did not take notes, you must deposit the pre-printed sheet of paper in the drop box within 2 hours of leaving the Morchand Center exam (or 2 hours after the release on Blackboard). Please add your exact drop-off time next to your name on the form provided.**
- Your notes are strictly confidential and are not to be shared with anyone. Discussing any details from your DO or the DOAP with anyone is considered a violation of the ISMMS Academic Integrity Policy (linked below) and will be subject to disciplinary action.
- Failure to return your handwritten notes to the Morchand Center, or any attempt to photocopy or duplicate your handwritten notes prior to returning them is considered a breach of the ISMMS Academic Integrity Policy.

**The due date for the DOAP is 11:59PM the night of your DO encounter at the Morchand center.**

- You ARE PERMITTED to use any on-line/Web sources/sites, auditory information, study notes, or any other material to assist you in completing the DO.
- You will submit your DOAP on BlackBoard under the “Assessments” tab as a Word document.
- You must delete the DOAP from your personal computer after the assignment is submitted.

The ISMMS Academic Integrity Policy is linked [HERE](#) for your reference.