

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

*Academic Year 2024-2025*

*Revised October 11, 2024*

## 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.

## **Pediatrics Direct Observation of History Taking Skills Learner Expectations**

**Scenario:** You will be asked to perform a telephone interview with the parent/caretaker of a patient.

**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 (i.e. child's) name and date of birth
  - Student establishes the relationship between interviewee and patient
- Initiating information gathering
  - Student asks the presenting problem or reason for the call
  - Student asks the onset of the presenting problem
- Exploring biomedical perspective of disease including relevant background and content
  - Student asks at least 7 relevant symptoms related to the presenting problem
  - Student asks at least 2 relevant questions about changes in the child's normal behaviors that are relevant to the presenting problem
  - Student asks about sick contacts and/or day care attendance
  - Student asks about social history
  - Student asks about developmental history
  - Student asks about relevant past medical history, family history, birth history, surgical history, and immunizations.
  - Student asks about medications and allergies
- Exploring family member's perspective of illness
  - Student acknowledges feelings, concerns and anxieties of caregiver by verbally recognizing and legitimizing them
- Closing the encounter
  - Student directly asks for any additional questions or concerns the caregiver may have
  - Student discusses initial diagnostic impressions
  - Student discusses initial treatment plan
  - Student discusses at least 2 items for caregiver to monitor
  - Student discusses call back or return precautions