

Preview Evaluation

Sample Exploration Student Performance Evaluation (SPE) [Version: 1]

Preview As

Student Performance Evaluation

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Student Level

Course Information

Date	Course	Location	Weeks
01/01/2006 - 01/31/2006	XXX-YYY: Department Course	Location	8

Evaluation Period: 01/01/2006 - 01/31/2006

Faculty: Evaluator name

Student: Student name Email: oasis@umassmed.edu, IREA@umassmed.edu

Question numbers in **red*** are required.

This is a UMass Chan milestone-based evaluation form. Please take a moment to identify the competency that each milestone is related to, as well as the full milestone description provided with each prompt. For your reference here is the catalogue of [UMass Chan's competencies and milestones](#).

The green highlighted area is where we expect a learner at this level to be. The more specific behavioral descriptors apply to the number scale gradations for this particular rotation to assist in your selection of the most appropriate level for this learner. Choose N/A if you did not observe the student for this milestone.

Please review this [1-page guide](#) for completion of this student performance evaluation (SPE).

PHYSICIAN AS COMMUNICATOR:

1.* Patient Communication: Please select the result that best describes your observation of the learner (Com1E):

Critical Deficiencies	Early Learner	Demonstrating Improvement				Graduation Target (...as befitting a physician)	
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5		Horizons Phase expected performance up to target 4.0			
Communicates appropriately during all stages of the doctor-patient relationship including assessing patient's understanding of communications.		Communicates effectively during all stages of the doctor-patient relationship including assessing patient's understanding of communications.		Communicates effectively during all stages of the doctor/patient relationship including self-assessment of own communication skills and consistent assessment of patient's understanding and preferences.			
0.5	1	1.5	2	2.5	3	3.5	4

- Not Applicable*
- 2.0: Student is not yet meeting early clerkship level performance.
- 2.5: Communicates effectively with patients. Empathic. Recognizes and responds to verbal or nonverbal cues. **May inconsistently** assess patient's understanding of information.
- 3.0: Communicates effectively with patients and **consistently** assesses patient's understanding. Empathic. Recognizes and responds to verbal or nonverbal cues. **May not appreciate patient preferences or areas for improvement.**
- 3.5: Communicates effectively with patients, **consistently assessing patient's understanding and preferences.** Develops therapeutic alliance. The student can identify areas for improvement in communication.
- 4.0: Communicates effectively with patients, consistently assessing patient's understanding and preferences, and **can quickly adapt communication skills** based on patient needs.

2.* **Documentation:** Please select the result that best describes your observation of the learner (Com2E):

Critical Deficiencies	Early Learner	Demonstrating Improvement					Graduation Target (...as befitting a physician)	
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5					Horizons Phase expected performance up to target 4.0	
Communicates with colleagues and team members in a responsible and responsive manner through appropriate <u>written</u> communication including medical record documentation, and/or other assignments.		Communicates with all colleagues and team members through appropriate <u>written</u> communication including accurate and complete medical record documentation, and/or other assignments.					Communicates effectively with all members of the healthcare team utilizing <u>written</u> communication including accurate, timely and complete medical record documentation; responsiveness to outreach via the electronic health record (EHR).	
0.5	1	1.5	2	2.5	3	3.5	4	

- Not Applicable*
- 2.0: *Student is not yet meeting early clerkship level performance.*
- 2.5: Written documentation is complete, organized, and accurate for **simple** cases. Requires some correction or assistance, especially for more complex cases.
- 3.0: Written documentation is complete, **well**-organized, and accurate for simple and **complex cases**. Some correction required.
- 3.5: Written documentation is comprehensive, well-organized, accurate and completed in a **timely** manner. **Minimal to no correction required.**
- 4.0: Written documentation is comprehensive, well-organized, accurate and timely with **NO** correction required. **Student is appropriately responsive to communication outreach via the EHR or other written outreach.**

3.* **Oral Presentation:** Please select the result that best describes your observation of the learner (Com4E):

Critical Deficiencies	Early Learner	Demonstrating Improvement					Graduation Target (...as befitting a physician)	
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5					Horizons Phase expected performance up to target 4.0	
Communicates with colleagues and team members in a responsible and responsive manner through appropriate <u>verbal</u> communication including oral presentations using a standardized format.		Communicates with all colleagues and team members through appropriate <u>verbal</u> communication including using well-organized oral case presentations and while speaking with consultants and ancillary team members.					Communicates effectively with all members of the healthcare team utilizing <u>verbal</u> communication including using the appropriate oral presentation format, speaking with multidisciplinary caregivers, and when negotiating conflict.	
0.5	1	1.5	2	2.5	3	3.5	4	

- Not Applicable*
- 2.0
- 2.5: Verbal communications are clear, organized, and accurate. Oral presentations **may omit some data or be verbose.**
- 3.0: Verbal communications including oral presentations are **complete**, well organized, clear, and accurate. Oral presentations may be **verbose.**
- 3.5: Oral presentations are complete, **concise**, and accurate. Able to **effectively communicate with ancillary team members and consultants.**
- 4.0: Verbal communications are complete, concise even with complex cases and/or while **navigating conflict**. Can easily **adapt presentations depending on the audience or clinical setting.**

PHYSICIAN AS CLINICAL PROBLEM SOLVER:

4.* **History Taking:** Please select the result that best describes your observation of the learner (Sol1E):

Critical Deficiencies	Early Learner	Demonstrating Improvement					Graduation Target (...as befitting a physician)	
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5					Horizons Phase expected performance up to target 4.0	
Acquires, synthesizes, and evaluates patient's medical history.		Demonstrates skills in acquiring, synthesizing, and evaluating the patient's medical history identifying key information gathered.					Consistently demonstrates skills in acquiring, synthesizing, and evaluating patient's history.	
0.5	1	1.5	2	2.5	3	3.5	4	

- Not Applicable
- 2.0: Student is not yet meeting early clerkship level performance.
- 2.5: **Consistently acquires**, synthesizes, and evaluates patient's medical history. May not identify key information.
- 3.0: **Demonstrates** skills in acquiring, synthesizing, and evaluating the patient's medical history and/or **identifies key information gathered.**
- 3.5: **Is consistently** skillful in acquiring, synthesizing, and evaluating the patient's medical history and **consistently** identifies key information gathered.
- 4.0: Demonstrates **advanced skills** in acquiring, synthesizing, and evaluating the **complex** patient's medical history and consistently identifies key information gathered. **A model for others.**

5.* **Physical Exam:** Please select the result that best describes your observation of the learner (Sol2E):

Critical Deficiencies	Early Learner	Demonstrating Improvement					Graduation Target (...as befitting a physician)	
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5					Horizons Phase expected performance up to target 4.0	
Performs elements of a physical exam relevant to the clinical situation and patient concerns including identifying common abnormalities.		Conducts organized complete or focused physical exam including identifying abnormalities using diagnostic tools, if applicable.					Appropriately selects and conducts complete or focused physical exams, using appropriate diagnostic tools and interpreting abnormalities.	
0.5	1	1.5	2	2.5	3	3.5	4	

- Not Applicable
- 2.0: Student is not yet meeting early clerkship level performance.
- 2.5: Performs physical exam identifying **common** abnormalities.
- 3.0: Appropriately **selects and performs complete or focused** physical exam identifying **common** abnormalities.
- 3.5: Performs complete or focused physical exam and **identifies less common abnormalities using advanced maneuvers as needed.**
- 4.0: **Appropriately selects and performs complete or focused** physical exam identifying less common abnormalities **and interpreting findings.**

6.* **Management Plan Formulation:** Please select the result that best describes your observation of the learner (Sol4E):

Critical Deficiencies	Early Learner	Demonstrating Improvement					Graduation Target (...as befitting a physician)	
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5					Horizons Phase expected performance up to target 4.0	
Identifies and differentiates clinical reasoning strategies to formulate differential diagnoses and develop management plans while acknowledging limitations of scientific/medical knowledge.		Demonstrates clinical reasoning strategies and can choose and interpret diagnostic tests to formulate differential diagnoses and develop management plans while considering limitations of scientific/medical knowledge.					Employs clinical reasoning strategies and diagnostic testing to formulate differential diagnoses and develops management plans that reflect patient preference and best available evidence using judgment.	
0.5	1	1.5	2	2.5	3	3.5	4	

- Not Applicable
- 2.0: Student is not yet meeting early clerkship level performance.
- 2.5: Can formulate diff dx and management plan for **common** conditions.
- 3.0: Can formulate diff dx and management plan for **more complex** conditions.
- 3.5: **Can choose and interpret diagnostic tests, using available evidence** to formulate a **prioritized** diff dx and management plan.
- 4.0: Can choose and interpret diagnostic tests to formulate a prioritized diff dx and management plan **while incorporating patient preferences and best available evidence and judgement.**

7.* **Procedures:** Please select the result that best describes your observation of the learner (Sol5E):

Critical Deficiencies	Early Learner	Demonstrating Improvement					Graduation Target (...as befitting a physician)
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5					Horizons Phase expected performance up to target 4.0
Identifies and articulates the indications and risks of selected medical procedures.		Observes medical procedures in the clinical setting verbalizing indications and risks and/or performs medical procedures in simulated scenarios using appropriate technique.					Explains the indications, risks, procedural steps for common medical procedures and can perform effectively.
0.5	1	1.5	2	2.5	3	3.5	4

- Not Applicable*
- 2.0: *Student is not yet meeting early clerkship level performance.*
- 2.5: Identifies and verbalizes indication and risks of selected procedures.
- 3.0: Identifies and verbalizes indication and risks of selected procedures **in a patient centered format.**
- 3.5: **Assists with patient procedures or performs procedures in simulated scenarios with correct technique** while verbalizing indications and risks.
- 4.0: Identifies indication, risks and procedural steps for common procedures and can perform them **effectively with patients.**

PHYSICIAN AS PROFESSIONAL:

8.* **Team Participation:** Please select the result that best describes your observation of the learner (Pro3E):

Critical Deficiencies	Early Learner	Demonstrating Improvement					Graduation Target (...as befitting a physician)
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5					Horizons Phase expected performance up to target 4.0
Understands the roles of health care professionals and consultants and works collaboratively in educational and/or clinical settings.		Demonstrates effective participation within interprofessional teams in educational and/or clinical settings.					Demonstrates effective and flexible participation within interprofessional teams in educational and clinical settings.
0.5	1	1.5	2	2.5	3	3.5	4

- Not Applicable*
- 2.0: *Student is not yet meeting early clerkship level performance.*
- 2.5: Consistently collaborates within interprofessional teams in educational and/or clinical settings with inconsistent (<50% of the time) demonstration of effective participation.
- 3.0: **Demonstrates effective participation** within interprofessional teams in educational and/or clinical settings most times (50-75% of the time).
- 3.5: **Consistently demonstrates** effective participation within interprofessional teams in educational and/or clinical settings (>75% of the time).
- 4.0: Excels at demonstrating effective **and flexible participation** within interprofessional teams in educational and clinical settings. **A model for others.**

9.* **Professionalism:** Please select the result that best describes your observation of the learner (Pro5E):

Critical Deficiencies	Early Learner	Demonstrating Improvement					Graduation Target (...as befitting a physician)	
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5					Horizons Phase expected performance up to target 4.0	
Attends to professional and administrative tasks including responding to school-related communication, punctual attendance, and accurate documentation in a timely manner as expected of a learner.		Completes professional and administrative tasks including responding to school-related communication, punctual attendance, and accurate documentation in a timely manner as expected of a clinical decision-maker.					Accomplishes professional and administrative tasks without prompting including responding to school-related communication, punctual attendance, and accurate documentation in a timely manner as befitting a physician.	
0.5	1	1.5	2	2.5	3	3.5	4	

- Not Applicable
- 2.0: Student is not yet meeting early clerkship level performance.
- 2.5: Attends to professional and administrative tasks consistently in the academic space but requires **significant prompting to complete clinical tasks.**
- 3.0: Completes professional and administrative tasks consistently in the academic setting but requires **occasional prompting to complete clinical tasks.**
- 3.5: Completes professional, administrative, and **clinical tasks without prompting.**
- 4.0: Excels at accomplishing professional, administrative, and clinical tasks **with an awareness of the entire team's work. A model for others.**

PHYSICIAN AS PERSON:

10.* **Learning Engagement:** Please select the result that best describes your observation of the learner (Per1E):

Critical Deficiencies	Early Learner	Demonstrating Improvement					Graduation Target (...as befitting a physician)	
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5					Horizons Phase expected performance up to target 4.0	
Seeks and participates in educational and/or clinical opportunities to develop their personal and professional knowledge and skills.		Continuously seeks and participates in opportunities to advance their personal and professional knowledge and skills with curiosity and humility.					Appreciates the need for lifelong learning in the profession and will seek and participate in personal and professional opportunities.	
0.5	1	1.5	2	2.5	3	3.5	4	

- Not Applicable
- 2.0: Student is not yet meeting early clerkship level performance.
- 2.5: Participates in all educational and clinical opportunities presented as part of the curriculum or structured patient care.
- 3.0: May ask for direction on materials related to cases **outside of the set curriculum** and is **actively engaged in care team activities particularly in areas of student curiosity and interests.**
- 3.5: Reviews materials related to cases/patients **independently and without prompting and brings that knowledge back to the team demonstrating their enthusiasm** for particular topics through educating others.
- 4.0: Reviews related materials and enthusiastically brings that knowledge back to the care team/**patient. Self-initiates dialogue with care team** to advance own learning, **asking questions in real time** indicating areas of personal interest.

PHYSICIAN AS HEALTH SYSTEMS NAVIGATOR:

11.* **Value Based Practice:** Please select the result that best describes your observation of the learner (Nav5E):

Critical Deficiencies	Early Learner	Demonstrating Improvement					Graduation Target (...as befitting a physician)
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5					Horizons Phase expected performance up to target 4.0
Establishes and maintains knowledge related to value-based practice, defined as providing the best possible care while minimizing costs to patients, providers, delivery systems, and payers.		Uses knowledge of value-based practice as clinical experience is accumulated in a variety of healthcare delivery settings.					Explains and evaluates the concept of and rationale for value-based practice while using evidence-based medicine, guidelines, and tools.
0.5	1	1.5	2	2.5	3	3.5	4

- Not Applicable*
- 2.0: *Student is not yet meeting early clerkship level performance.*
- 2.5: The learner includes costs and diagnostic accuracy in their discussion of the treatment plan.
- 3.0: The learner **attempts to use value-based practice principles** to formulate their plan of care.
- 3.5: The learner **accurately and consistently** uses value-based practice principles to formulate their plan of care.
- 4.0: The learner accurately and consistently uses value-based practice principles, evidence-based medicine, **including guidelines and decision support, and can explain these processes** to other care team members.

12.* **Healthcare System:** Please select the result that best describes your observation of the learner (Nav6E):

Critical Deficiencies	Early Learner	Demonstrating Improvement					Graduation Target (...as befitting a physician)
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5					Horizons Phase expected performance up to target 4.0
Recognizes that the healthcare system is comprised of stakeholders including patients, families, delivery systems, providers, and leaders.		Understands how the patient experience and outcomes are impacted by systems of care and applies that knowledge to decision-making and action.					Describes how patient experience and outcomes of care are impacted by the function of healthcare delivery systems and how healthcare providers and leaders function within these systems.
0.5	1	1.5	2	2.5	3	3.5	4

- Not Applicable*
- 2.0: *Student is not yet meeting early clerkship level performance.*
- 2.5: Can participate in conversations about healthcare system composition and identifies that patients, families, delivery systems, providers and leaders are all stakeholders.
- 3.0: Consistently **includes** patient's preferences, social determinants of health (SDOH) and health care coverage considerations in **their history gathering and presentations** on the **individual level**.
- 3.5: **Includes therapeutic options in their plan of care** that are based on the patient's preferences, SDOH, health care coverage, and **can identify barriers** to care delivery on the **individual level**.
- 4.0: Includes therapies based on the patient's preferences, SDOH, health care coverage, and **can strategize about negotiating barriers** to care on the **individual and population level and** discuss how patient experience data is used.

PHYSICIAN AS PATIENT AND COMMUNITY ADVOCATE:

13.* **Advocacy:** Please select the result that best describes your observation of the learner (Adv2E):

Critical Deficiencies	Early Learner	Demonstrating Improvement					Graduation Target (...as befitting a physician)
Discovery Phase expected performance up to target 2.5		Exploration Phase expected performance up to target 3.5					Horizons Phase expected performance up to target 4.0
Recognizes the need to advocate for improving the health of individual patients and populations in need.		Applies the skills needed to advocate for improving the health of individual patients and populations in need.					Advocates to improve the health of individual patients and populations in need.
0.5	1	1.5	2	2.5	3	3.5	4

- Not Applicable*
- 2.0: *Student is not yet meeting early clerkship level performance.*
- 2.5: The learner **points out gaps and inequities** in care.
- 3.0: The learner **creates a plan to mitigate** the gaps and inequities in care for their individual patients.
- 3.5: The learner **initiates plans to mitigate the gaps** and inequities in care for their individual patients such as reaching out to Social Work, Case Management, etc.
- 4.0: The learner **participates in system-level initiatives** to improve health care quality and equity for populations.

ADDITIONAL INFORMATION:

14. Please indicate the amount of time you worked with this learner:

15. If more than one person contributed to this assessment please list the names and roles (resident, faculty, nurse practitioner, etc) here:

[Rich text](#)

NARRATIVE COMMENTS:

16.* Summative comments - to be included in Medical Student Performance Evaluation (MSPE):

[Rich text](#)

17.* Identified areas for improvement - not to be included in MSPE unless indicative of a trend:

[Rich text](#)

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