

Skill Priority Indicators H=high priority M=moderate or significant L=low or minor	Competency Rating Scoring Indicators  Rating Scale: 1= Not at all, 2=Infrequent, 3= Adequate, 4= Good, 5= Very Good			
Priority Rating	Category	SP Competency Rating	SP Written or Verbal Feedback	Attendee Competency Rating of Self
<b>Engage through Acknowledgment:</b>				
H	Acknowledged while greeting when entering the exam room (smile, eye contact, hello, etc.)			
H	Acknowledged using patient/family name as appropriate – (engaging with the patient)			
<b>Introduction:</b>				
H	Introduces self and purpose of the call.			
H	Describes Role			
M	Identifies agency and physician they are working with and relationship to provider			
M	Highlighting the value of self and the team/clinical provider/organization/ personal experience/training/skill set, etc.			
M	Inquire on the patient’s understanding on the referral reason to care coordinator			
H	Review agenda or reason for visit with patient and obtain agreement			
H	Ask permission for today’s discussion			
<b>Duration:</b>				
H	Gave time expectation for today’s discussion			
<b>Assessing:</b>				
H	The patient’s desire and choice to participate in self-management			
M	Attendee inquires why patient would like to make changes to his/her health			
H	See patient’s permission before offering information or advice.			
M	Provides information or advice that is sensitive to client concerns and understanding.			
H	Setting a goal based on the patient’s ideas ( <i>asking versus telling</i> ) SMART Goal			
M	Uses a range of open-ended questions (cannot be answered with yes, no, maybe)			
H	Affirmations: Uses words that recognize the patient’s strengths & abilities (determined, persevere, persistent)			
H	The patient’s confidence and/or readiness were evaluated			
<b>Acceptance: Engagement that demonstrates respect and unconditional positive regard:</b>				
M	Friendly <b>tone of voice</b>			
M	- <b>Pace of Speech</b>			

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M	- Use of <b>Plain Language</b>			
L	- Appropriate use of <b>inflection on keywords</b> ( <i>teamwork, timely service, respectful, manage pain, understand side effects, etc.</i> )			
H	- <b>Active listening</b> ( <i>nodding, no interrupting, confirmed what they heard customer say, etc.</i> )			
ML	- <b>Effective physical positioning</b> ( <i>mirrored patient's position, sat without table or desk between, leaned in, etc.</i> )			
M	- <b>Appropriate facial expressions</b> ( <i>no eye-rolling, etc.</i> )			
L	<b>Limited multitasking</b> ; communicator present and attentive			
H	<b>Empathy:</b> The attendee expressed compassion and empathy by listening and understanding the patient's feelings & perspective			
H	Uses verbal sympathetic, or understanding comments.			
H	Viewed the patient as the expert upon themselves with ability to follow the plan			
H	Emphasizes the client's freedom of choice, autonomy and personal responsibility			
H	Was present – felt listened to and viewed as a relevant team member			
H	Reflection: Repeats the patient's comments and ideas back to convey understanding			
<b>Planning</b>				
H	A summary of the encounter was provided, ambivalence acknowledged and the plan reviewed			
H	The attendee relayed and confirmed the next step with the patient – <i>set up follow up appointment (in-person or phone call)</i>			
<b>Closure</b>				
M	Demonstrated respect by thanking the patient and showed appreciation (i.e., thank you for trust, for letting me serve you, ask if there's anything you can do before leaving, provide business card if applicable, etc.)			
<b>Attendees Participation and Response Feedback:</b>				
M	The attendee was engaged in the simulation activity			

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M	Standard Patient identifies three things they did well and one opportunity to improve			
M	Attendee identifies two action steps to increase their skill with the improvement opportunity that they identified			