

**COGConnect Consultation Observation Guide**
**Consulter Name**.....

Competence task	Score 0=not done, 1=some done poorly, 2=some done well, 3=all done well (TICK)				Date: ____/____/____
<b>Preparing and opening the session:</b>	0	1	2	3	Points of strength & Points for improvement
Prepares self and consultation space and accesses medical record prior to direct patient contact. Introduces themselves and shows other evidence of rapport building. Identifies patient's main reason(s) for attendance and negotiates this agenda as appropriate.	0	0	0	0	
<b>Gathering a well-rounded impression:</b>	0	1	2	3	Points of strength & Points for improvement
Obtains <b>biomedical perspective</b> of presenting problem and relevant medical history including red flags. PC, HPC, PMH, ROS, DH & allergies <i>as appropriate to presentation</i> .	0	0	0	0	
Elicits <b>patient's perspective</b> : ideas, concerns, expectations, impact, and emotions (ICEIE)	0	0	0	0	
Elicits <b>relevant background information</b> such as work and family situation, lifestyle factors (e.g. sleep, diet, physical activity, smoking, drugs, and alcohol) and emotional life/state.	0	0	0	0	
Conducts a <b>focused examination</b> of the patient	0	0	0	0	
<b>Formulating:</b>	0	1	2	3	Points of strength & Points for improvement
Can summarise the information gathered so far. Shows evidence of understanding current problems/issues and differential diagnoses. Makes judicious choices regarding investigations, treatments, and human factors (e.g. how to deal sensitively with patient concerns).	0	0	0	0	
<b>Explanation and planning:</b>	0	1	2	3	Points of strength & Points for improvement
Consulter offers explanations to patient, taking account of their current understanding and wishes (ICEIE). Provides information in jargon-free language, in suitable amounts and using visual aids and metaphors as appropriate. Checks patient understanding.	0	0	0	0	Any examples of chunking, checking, or clarifying?
Develops clear management plan with patient-sharing decision-making as appropriate.	0	0	0	0	
<b>Activating:</b>	0	1	2	3	Points of strength & Points for improvement
Affirms current self-care. Enables patient's active part in improving and sustaining health: smoking cessation, healthier eating, physical activity, better sleep, emotional wellbeing. Enables patient using skills of motivational interviewing where appropriate.	0	0	0	0	
<b>Closing and housekeeping:</b>	0	1	2	3	Points of strength & Points for improvement
Brings consultation to timely conclusion, offers succinct summary, and checks patient understanding. Gives patient opportunity to gain clarity via questions.	0	0	0	0	
Arranges follow-up and safety-nets the patient with clear instructions for what to do if things do not go as expected.	0	0	0	0	
<b>Integration:</b>	0	1	2	3	Points of strength & Points for improvement
Writes appropriate consultation notes +/- referrals etc. Identifies any learning needs. Identifies any emotional impact of consultation.	0	0	0	0	
<b>Generic Consulting Skills:</b>	0	1	2	3	Points of strength & Points for improvement
<i>Posture. Voice:</i> pitch, rate, volume. <i>Counselling skills:</i> Open questions, Affirmations, Reflections (Simple and Advanced) and Summaries. <i>Advanced skills:</i> picking up on cues, scan and zoom, giving space to patient, conveying hope and confidence	0	0	0	0	
<b>Organisation and efficiency:</b>	0	1	2	3	Points of strength & Points for improvement
Fluency, coherence, signposting of the stages, keeping to time.	0	0	0	0	

