

HIV/STD PREVENTION AND CARE

PART IV

Clinician Evaluation

This tool is designed to assist in evaluating skills for effective management of clients with symptoms or history of exposure to sexually transmitted disease. It reflects standards and values promoted in CDC Guidelines and North Carolina protocol for appropriate management of STD clients.

CLINICIAN EVALUATION FORM

CLINICIAN _____

CLINICAL SETTING _____

EVALUATOR _____ EVALUATION DATE _____

STANDARD

1 = Needs Improvement

2 = Satisfactory

3 = Excellent

4 = Not Applicable

COMMUNICATION SKILLS	1	2	3	4	COMMENTS
1. Cordially greets patients by name					
2. Professionally introduces self and observer					
3. Attentive: <input type="checkbox"/> body language <input type="checkbox"/> verbal skills					
4. Uses open-ended questions					
HISTORY TAKING	1	2	3	4	COMMENTS
5. Ascertains the following:					
▪ Reason(s) for visit					
▪ Onset, duration characteristics, frequency of symptoms					
▪ History of similar problems					
▪ Sex partner with current or recent symptoms					
▪ Other signs/symptoms					
▪ History of treatment for STD(s)					
▪ Recent antibiotic use (type, purpose, duration)					
▪ General health status					
▪ Other medications (type, purpose, duration)					
▪ Known drug allergy (drug, reaction, date)					
SEXUAL RISK ASSESSMENT	1	2	3	4	COMMENTS
6. Time since last sexual exposure					
7. Exposure sites (oral, genital, anal)					
8. Number of sex partners: ___ 60 days ___ 6 months					
9. Condom use					
10. Sexual preference(s)					
11. Partner(s) with known high-risk sexual practices					
PSYCHOSOCIAL ASSESSMENT	1	2	3	4	COMMENTS
12. Drug/alcohol/needle sharing practices					
13. Partner with drug/needle sharing practices					
14. History of sexual abuse/assault					
REPRODUCTIVE HISTORY - Women	1	2	3	4	COMMENTS
15. Date of last menses					
16. Unusual aspects of last menses (flow, duration, pain)					
17. Type of contraception					
18. Last pap smear (date, results)					

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PHYSICAL ASSESSMENT	1	2	3	4	COMMENTS
19. Professional approach:					
▪ Gives appropriate instructions to patient					
▪ Provides privacy for patient's disrobing/undressing					
▪ Reinforces confidentiality					
▪ Ensures patient is appropriately draped during assessment					
▪ Provides explanations before touching patient					
▪ Explains findings as exam process proceeds					
20. Performs appropriate STD exam:					
▪ Skin inspection: face, trunk, forearms, palms, soles, rash, nodules, discoloration					
▪ Inspects oropharynx for lesions					
▪ Palpates lymph nodes: cervical, axillary, supraclavicular, epitrochlear, inguinal					
▪ Females: palpates abdomen, checking for rebound tenderness					
GENITAL EXAM - Male	1	2	3	4	COMMENTS
▪ Inspects pubic hair for lice, nits					
▪ Inspects penis, meatus, foreskin for urethral discharge (color, amount, character) and lesions					
▪ Palpates scrotum for testicular tenderness, masses					
▪ Inspects anus and perianal area (if applicable)					
GENITAL EXAM - Female	1	2	3	4	COMMENTS
▪ Inspects external genitalia (lice, nits, discharge, masses, lesions, tenderness)					
▪ Palpates Bartholin's and Skene's glands					
▪ Inspects vaginal mucosa for lesions					
▪ Inspects the cervix for discharge, lesions, ectopy, friability					
▪ Performs bimanual assessment (cervical motion tenderness, uterine enlargement, adnexal tenderness, pelvic mass)					
21. Performs assessment efficiently (time for uncomplicated assessment: women – 30 min.; men – 20 min.)					
22. Appropriate technique for handling clean and contaminated items.					

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SPECIMEN COLLECTION	1	2	3	4	COMMENTS
23. Collects appropriate specimens per symptoms/exam/protocol					
24. Appropriate sequencing of specimen collection					
25. Appropriate technique for collecting specimens					
▪ Wet mount					
▪ Gonorrhea culture(s)					
▪ Gram stain					
▪ Chlamydia					
▪ Pap smear (if not done in past year)					
▪ STS (unless nonreactive in last 30 days)					
▪ HIV test with informed consent					
26. Collects appropriate additional tests based on history and exam findings (darkfield, pregnancy)					
27. Correctly labels all specimens					
28. Handles and transports specimens correctly					
ASSESSMENT AND TREATMENT	1	2	3	4	COMMENTS
29. Impression / diagnosis reflects accurate assimilation of subjective and objective information gathered					
30. Selects appropriate treatment per protocol/standing orders					
MEDICAL CONSULTATION AND REFERRAL	1	2	3	4	COMMENTS
31. Provides appropriate referral to community resource					
32. Consults appropriately with physician (unsatisfactory assessment, uncertain clinical findings, drug reaction, no standing orders)					
33. Refers to appropriate specialist (for hospitalization, prenatal care, contraception, urologic/prostatic disorder, drug reaction, surgery, etc.)					
34. Consults with DIS or makes referrals when indicated					
COUNSELING/EDUCATION	1	2	3	4	COMMENTS
35. Provides counseling and education tailored to client knowledge and needs					
36. Assesses and clarifies patient understanding of:					
▪ names of diseases, transmission, incubation, symptoms					
▪ complications					
▪ results of tests					
▪ name of medication and why it is used					
▪ how to take the medication and what to expect as treatment outcome					
▪ potential side effects of medication					
37. Stresses partner notification (sex partners seek STD medical evaluation)					
38. Facilitates client-identified risk reduction plan					
39. Provides patient handouts as appropriate (disease specific, treatment specific)					

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CLINICIAN'S APPROACH	1	2	3	4	COMMENTS
40. Invites patient to ask questions					
41. Answers patient questions appropriately					
42. Remains sensitive to patient's concerns					
43. Maintains a relaxed manner throughout the interaction					
44. Maintains a nonjudgemental attitude					
45. Closes with open-ended questions to assess take-away plan and message					
46. Manages all patient information confidentially					
FOLLOW-UP	1	2	3	4	COMMENTS
47. Schedules follow-up as appropriate					
▪ clinic procedure for follow-up					
▪ health consequences					
▪ lifestyle/sexual changes indicated pending follow-up					
48. Follow-up history includes:					
▪ changes in symptoms					
▪ adverse reaction to drugs					
▪ compliance with instructions					
▪ sexual exposure since therapy					
▪ treatment status of sex partners					
49. Collects appropriate follow-up laboratory specimens					
BIOSAFETY PROCEDURES	1	2	3	4	COMMENTS
50. Follows biosafety and infection protocol:					
▪ handling specimens					
▪ handling clean equipment					
▪ handling dirty/contaminated equipment/supplies					
▪ protective gear					
DOCUMENTATION	1	2	3	4	COMMENTS
51. Completes record in accordance with legal requirements					
52. Completes the following parts of the medical record:					
▪ patient complaints					
▪ abnormal findings described					
▪ lab results documented					
▪ impression/diagnosis					
▪ treatment/management plan					
53. Signs medical record					
COMMENTS:					

Policies/protocol/standing orders: Available In Clinic Current Signed

CLINICIAN EVALUATION FORM

Clinician: _____ **Clinic:** _____

Evaluator: _____ **Evaluation Date:** _____

Each clinician should be observed periodically to ensure the quality of patient services. This form can be used for recording such observations. Use the legend below to indicate the level of performance for each function across from the applicable problem. This format can be used after observing one or several patient encounters with the clinician.

SCORE

1 = Needs Improvement 2 = Satisfactory 3 = Excellent N/A = Not Applicable

	Appropriate History	Appropriate Exam	Appropriate Specimen Collection	Appropriate Lab	Appropriate Treatment/Management
PROBLEM	SCORE	SCORE	SCORE	SCORE	SCORE
Genital Lesion					
Other Lesion					
Genital Discharge					
Other Genital Complaint					
Abdominal Pain					
Contact To STD					
Other Problem					

COMMENTS:

Policies/protocol/standing orders: Available In Clinic Current Signed