

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. Emotional/mental health concerns					
15. History of abuse/assault					
REPRODUCTIVE HISTORY - Women	1	2	3	4	COMMENTS
16. Date of last menses					
17. Unusual aspects of last menses (flow, duration, pain)					
18. Type of contraception					
19. Last pap smear (date, results)					

CLINICIAN EVALUATION FORM

1 = Needs Improvement

2 = Satisfactory

3 = Excellent

4 = Not Applicable

PHYSICAL ASSESSMENT	1	2	3	4	COMMENTS
20. 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					
21. 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, adenexal tenderness, pelvic mass)					
22. Performs assessment efficiently (time for uncomplicated assessment: women – 30 min.; men – 20 min.)					
23. Appropriate technique for handling clean and contaminated items.					

CLINICIAN EVALUATION FORM

1 = Needs Improvement

2 = Satisfactory

3 = Excellent

4 = Not Applicable

SPECIMEN COLLECTION	1	2	3	4	COMMENTS
24. Collects appropriate specimens per symptoms/exam/protocol					
25. Appropriate sequencing of specimen collection					
26. 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					
27. Collects appropriate additional tests based on history and exam findings (darkfield, pregnancy)					
28. Correctly labels all specimens					
29. Handles and transports specimens correctly					
ASSESSMENT AND TREATMENT	1	2	3	4	COMMENTS
30. Impression / diagnosis reflects accurate assimilation of subjective and objective information gathered					
31. Selects appropriate treatment per protocol/standing orders					
MEDICAL CONSULTATION AND REFERRAL	1	2	3	4	COMMENTS
32. Provides appropriate referral to community resource					
33. Consults appropriately with physician (unsatisfactory assessment, uncertain clinical findings, drug reaction, no standing orders)					
34. Refers to appropriate specialist (for hospitalization, prenatal care, contraception, urologic/prostatic disorder, drug reaction, surgery, etc.)					
35. Consults with DIS or makes referrals when indicated					
COUNSELING/EDUCATION	1	2	3	4	COMMENTS
36. Provides counseling and education tailored to client knowledge and needs					
37. 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					
38. Stresses partner notification (sex partners seek STD medical evaluation)					
39. Facilitates client-identified risk reduction plan					
40. Provides patient handouts as appropriate (disease specific, treatment specific)					

CLINICIAN EVALUATION FORM

1 = Needs Improvement

2 = Satisfactory

3 = Excellent

4 = Not Applicable

CLINICIAN'S APPROACH	1	2	3	4	COMMENTS
41. Invites patient to ask questions					
42. Answers patient questions appropriately					
43. Remains sensitive to patient's concerns					
44. Maintains a relaxed manner throughout the interaction					
45. Maintains a nonjudgemental attitude					
46. Closes with open-ended questions to assess take-away plan and message					
47. Manages all patient information confidentially					
FOLLOW-UP	1	2	3	4	COMMENTS
48. Schedules follow-up as appropriate clinic procedure for follow-up health consequences					
lifestyle/sexual changes indicated pending follow-up					
49. Follow-up history includes:					
changes in symptoms					
adverse reaction to drugs					
compliance with instructions					
sexual exposure since therapy					
treatment status of sex partners					
50. Collects appropriate follow-up laboratory specimens					
BIOSAFETY PROCEDURES	1	2	3	4	COMMENTS
51. Follows biosafety and infection protocol:					
handling specimens					
handling clean equipment					
handling dirty/contaminated equipment/supplies					
protective gear					
DOCUMENTATION	1	2	3	4	COMMENTS
52. Completes record in accordance with legal requirements					
53. Completes the following parts of the medical record:					
patient complaints					
abnormal findings described					
lab results documented					
impression/diagnosis					
treatment/management plan					
54. 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