

THE LONGITUDINAL PRECEPTOR PROGRAM
2024-2026
Preceptor Packet – Discovery Phase



University of Massachusetts T.H. Chan Medical School

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Course Directors

Dear Longitudinal Preceptor,

Welcome to the Longitudinal Preceptor Program (LPP)! We are looking forward to a successful year.

Below are the major points of the LPP program for new students in the new medical student curriculum

- LPP is a key clinical experience for students which shapes their professional development.
- LPP runs through the first 18 months of medical school, the discovery phase in the new Vista Curriculum

Time commitment Our model remains the same. We will still be pairing two students with two preceptors (primary care & specialist). Each preceptor is assigned a pair of students for the 18 months in the Discovery Phase of our Vista curriculum. The discovery phase is an 18-month curriculum. There will be a total of 12 required sessions (6 in year 1 & 6 in year 2) throughout the 18 months of this “discovery phase”.

- A session is not meant to be just a shadowing experience, but a chance for students to interact with patients so that they can start practicing their history taking, physical exam, and some basic problem solving.
- Teaching should be very basic – they are only 1st and 2nd year medical students
- **The model:**
 - Students are assigned 2 preceptors.
 - Half their sessions are done w/ a primary care preceptor (IM, family medicine, hospitalist, EM, sometimes peds) and half w/ a specialist or pediatrician.
 - As a preceptor, you would be assigned 2 students but would only have 1 student at a time and still do the 13 sessions over 18 months The purpose is to broaden the students’ learning experience, so they are exposed to a variety of settings (i.e. primary care as well as specialist care).
- Students can practice and apply the skills they learn in the early clinical learning in small groups in both the primary care and subspecialty settings. A similar model has been successful with our PURCH students and faculty, and we believe this mix will better prepare them for third year.
- The hope is that you will be able to continue as their preceptor for the **full 18 months of the Discovery curriculum**

Now some logistics:

- **First meeting:** Your students have been instructed to schedule a meeting with you (15–20 minutes) to discuss the course and his/her personal objectives. At this meeting they should schedule as many of their fall semester visits as possible (if not the entire year). Please review the syllabus prior to the meeting. This will be very helpful in defining objectives for your students and yourself.
- **Communication:** We encourage students to maintain good communication with you. We remind students that no matter how busy you may be, you will always appreciate students keeping you informed if they are late or unable to attend a session. Email or cell phones are the preferred methods of communication.
- **Objectives:** There are clear course objectives that we would like all preceptors to achieve (see p 10). We also encourage students to think about any personal goals that

they would like to achieve during this year-long experience and to discuss those with you.

- **Attendance:** LPP students will come to your office for 12 sessions total (split between the 2 students (6 each)) during the discovery phase (first 18 months of medical school) each session being 3-4 hours.
- **WBA's** Your LPP students will send you Workplace Based Assessments also known as WBA's
- **They are milestone, formative assessments that can be filled out after the student encounter (more information to come on these in the fall).**
- **Email updates:** We will be sending periodic emails to all preceptors throughout both semesters updating you on the topics being covered in their Doctoring and Clinical Skills (DCS) small groups as well as Physical Diagnosis sessions. Hopefully this information will help you focus some of your sessions with the students.
- **Feedback:** At the end of each session, please try and provide some feedback (positive & constructive) on their beginning interviewing and problem-solving skills. Try to also discuss plans for the next session using the checklist and objectives provided.
- **Observation:** You should observe your student(s) interacting with a patient in some capacity at least one time per session. The more you observe the more feedback you can provide.
- **Evaluation:** WBA's Workplace Based Assessments – these will be completed 3 times during each academic year. Students will send you a link and you will fill them out within 48 hours. These will take the place of the long end of year evaluation. These will give students timely feedback so that they can improve their skills. The Early Clinical Learning course (ECL) uses these in the Physical Diagnosis and Hospital session components of the course. Students are used to this type of evaluation.
- **Professionalism:** Enclosed you will find the University of Massachusetts Chan Medical School Guidelines for Professional Behavior guideline. We have reviewed this guideline with all medical students. We would like you to be aware of the professional standard that our students are held accountable for.
- **Your input:** The Longitudinal preceptor program would not run without you! If you have any comments, suggestions or concerns, don't hesitate to contact us via email at LPP@umassmed.edu

Thank you again for continuing with the Longitudinal Preceptor Program.

Sincerely,
Apeksha and Christine

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LONGITUDINAL PRECEPTOR PROGRAM CONTACTS

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Longitudinal Preceptor Program

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Or please reach out to the Program at
LPP@umassmed.edu for any questions or
concerns.

General Student Instructions/Requirements

(as provided to students)

1. A total of 12 precepting sessions are required for LPP throughout the first 18 months of medical school , Discovery Phase, Six sessions in the first twelve months and six in the last 6 months. Ideally one session every few weeks
2. **After each visit, you will send a Work based assessment (WBA's) to your evaluator**
3. You are **required** to call your preceptor to schedule an initial meeting (approximately 15-20 minutes) to arrange your schedule before you formally start seeing patients. **Contact your preceptor ASAP**, to schedule this first meeting. Ideally, this should occur before you start your first precepting session, but your preceptor may prefer to meet by having you arrive early on your first day.

Typically email or cell phone or both are the preferred method of communication with your preceptor but please discuss this with your preceptor. At the initial meeting, please **review the course book and your educational goals with your preceptor.**

4. Finally, it is important to recognize that although you are a student – you are becoming a medical professional. You will be expected to dress and act accordingly. **Please review the medical school's guidelines for professional behavior in the appendix prior to your first clinical encounter.**

Helpful Hints for Students (FYI as given to students)

The following are some helpful hints for you as you begin your LPP experience:

1. It is your responsibility to contact the preceptor and arrange on-site visits. Discuss with your preceptor the best way to communicate with him/her – phone, email, etc.
2. In regard to attire, this is best discussed with your preceptor. Some preceptors may wear white coats and prefer that you wear them as well. Some may prefer ties, and *jeans are not* appropriate.
3. Punctuality - remember, many of your preceptors have very busy practices. Please be on time for scheduled visits or notify your preceptor if you will be late.
4. Get to know the staff at your preceptor's office. Physicians, even in a solo practice, do not work alone. The office staff may include nurses, receptionists, lab personnel, and office workers. Let them know who you are as soon as possible. In many instances, these people can be very helpful, supportive and instructive.
5. How should you introduce yourself? Most preceptors will introduce you to patients and staff as a student/doctor or medical student. You can clarify this with your preceptor.
6. School ID badge - Always wear an identifying name badge, especially when dealing with patients in a clinic or hospital setting.
7. Some preceptors are busier than others and may not have the time to discuss individual patients with you during patient hours. Ask your preceptor **when** the best time is to ask questions or discuss things. Also - ask your preceptor for feedback on your progress if he/she does not voluntarily give this to you!
8. It may help to jot things down on a small notepad during your visit. In this way, you can keep a record of your questions, what things to "look up" later, or to discuss in your small group session, or to ask your preceptor at the end of the session. Please use the checklists to help you to evaluate what you've done at each session and what goals you have for the next session.
9. Active observation is important in LPP. You have been taught interviewing frameworks in DCS 1 small groups--observe how your preceptor collects information and what information they collect. Do they adhere to the frameworks you have been taught? If not, why not? Consider discussing their approach with them and how they were taught these skills.
10. **Confidentiality** - In order to ensure the confidentiality of the doctor-patient experience, any discussion of patient-related issues must be conducted in an appropriate private setting and only with those individuals directly concerned with patient care.
11. **Please** review the complete medical history framework – this is the format you will use for the rest of your career! Please note: this format is the same for obtaining the history, orally presenting the history, and writing up the history. Learn it now and learn it well!

Most importantly, **Enjoy this opportunity!** If you have any questions or issues, please contact LPP@umassmed.edu

GUIDELINES FOR PROFESSIONAL BEHAVIOR

The Faculty and Student Body of the University of Massachusetts Medical School regard the following as guidelines for professional behavior. These areas are derived from the school's Technical Standards (see Student Handbook). Students are expected to show professional behavior with or in front of patients, members of the health care team, and others in the professional environment (school, hospital, clinic, office) including members of the faculty and administration, other students, standardized patients, and staff. Faculty members and administrators are expected to abide by similar standards. (Approved by the Education Policy Committee 11/01)

PROFESSIONAL ATTRIBUTES

Displaying honesty and integrity

- Never misrepresents or falsifies information and/or actions (i.e. cheating)
- Does not engage in other unethical behavior

Showing respect for patient's dignity and rights

- Makes appropriate attempts to establish rapport with patients or families.
- Shows sensitivity to the patient's or family's feelings, needs, or wishes.
- Demonstrates appropriate empathy.
- Shows respect for patient autonomy.
- Maintains confidentiality of patient information.

Maintaining a professional demeanor

- Maintains professional demeanor even when stressed; not verbally hostile, abusive, dismissive or inappropriately angry.
- Never expresses anger physically.
- Accepts professionally accepted boundaries for patient relationships.
- Never uses his or her professional position to engage in romantic or sexual relationships with patients or members of their families; never misuses professional position for personal gain.
- Conforms to policies governing behavior such as sexual harassment, consensual amorous relationships, hazing, use of alcohol, and any other existing policy of the medical school.
- Is not arrogant or insolent.
- Appearance, dress, and professional behavior follows generally accepted professional norms.

Recognizing limits & when to seek help

- Appears aware of own inadequacies; correctly estimates own abilities or knowledge with supervision.
- Recognizes own limits, and when to seek help.

RELATIONSHIP TO OTHERS

Responding to supervision

- Accepts and incorporates feedback in a non-resistant and non-defensive manner.
- Accepts responsibility for failure or errors.

Demonstrating dependability and appropriate initiative

- Completes tasks in a timely fashion (papers, reports, examinations, appointments, patient notes, patient care tasks).
- Does not need reminders about academic responsibilities, responsibilities to patients or to other health care professionals in order to complete them.
- Appropriately available for professional responsibilities (i.e. required activities, available on clinical service, responds to pager).
- Takes on appropriate responsibilities willingly (not resistant or defensive).
- Takes on appropriate patient care activities (does not "turf" patients or responsibilities).

Interacting with other members of the team

- Communicates with other members of the health care team in a timely manner.
- Shows sensitivity to the needs, feelings, and wishes of health care team members.
- Relates and cooperates well with members of the health care team.

Workplace Based Assessment (WBA) Instructions

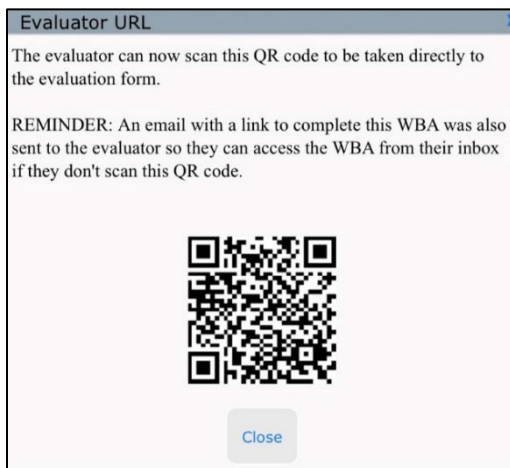
Workplace Based Assessments (WBAs) are intended for learners to be directly observed and receive written feedback on a singular, brief observation. These are designed to be done in real time on a mobile device (not later on a computer).

These are FORMATIVE (do not count towards grading).

When your student generates a WBA, there are two ways you can access the WBA in real-time without having to enter your OASIS username and password:

1a. After the student selects the content area (LPP), WBA form, and your name, OASIS will generate a QR code you can scan to access the WBA without having to enter your OASIS username and password

Scan the QR code from your student's phone to access the WBA. The screen should look like this:



1b. OASIS will also send an email containing an auto-login link directly to your inbox so you can still access the WBA in real-time if you were not able to scan the QR code from your student's phone

Click the URL included in the email to access the WBA in OASIS (see green circle in sample email below). If using this URL, you do not need to enter your OASIS username and password.

Subject:OASIS NOTIFY: Student1 TEST has added an evaluation for you to complete.

AS A REMINDER, YOUR USERNAME IS: test_fac1

The following message has been included:

Student1 TEST has added an evaluation for you to complete.

PLEASE NOTE:

Recommended Browsers: Google Chrome, Firefox.

Auto-login URLs expire in 7 days; however, each weekly reminder email will include a new active URL.

You have 1 evaluation to complete.

No login required for the links to individual evaluations.

Discovery: DIS-PD - Physical Diagnosis

Complete BEFORE: 11/18/2022

Course Dates...: 08/22/2022 - 06/26/2023

Location.....: UMASS, Worcester

Evaluation.....: Physical Diagnosis (PD4) WBA

Student.....: TEST, Student1

URI

<https://nam10.safelinks.protection.outlook.com/?url=https%3A%2F%2Fumassmed.oasisscheduling.com%2Fua%2F1f85a87aaf2272&data=05%7C01%7CIREA%40umassmed.edu%7C4dabfde659cd4db2008d08dac966f1a7%7Cee9155fe2da34378a6c44405faf57b2e%7C0%7C0%7C638043741218500640%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAilCjQjoiV2luMzliLjBtIi6k1haWw%7C%7C&sd=0&data=P0nY1TuGPrxm1LepAwULiO%2FyY%2FtkPE5ICellD7Jzw%3D&reserved=0>

Contact person.: IREA@umassmed.edu

Learning objectives – LPP (as given to students)

The learning objectives of the LPP are met by placing students in a variety of clinical settings and specialties. Therefore, students can expect differences between their experience and those of their classmates. Some of these guidelines may be difficult to complete depending on the clinical setting. As long as you are meeting the basic educational goals then you are on the right track. If this is not happening, or you are having other difficulties with your LPP assignment, please let us know.

1. Demonstrate knowledge of workflow of your practice site.
2. Describe Communication Skills used by your Preceptor in 1 patient encounter per session.
3. Demonstrate the ability to gather the 7 cardinal features.
4. Gather a History of Present Illness (HPI).
5. Gather components of the complete history: HPI, PMH, Meds, Allergies, FH, SH.
6. Demonstrate oral presentation from your LPP's history (see appendix and review Pass One in resources in ECL blackboard).
7. Observe the difference between a chronic/follow-up visit and acute illness visit.
8. Participate in a Continuity Patient Encounter if your practice setting is amenable. Options can include see same patient again, consultant visit, accompany preceptor to home visit, attend procedure.
9. Describe the role of another member of the patient care team through working with them during one of your sessions.
10. Utilize the patient's Electronic Health Record (EHR) to find vitals, medication list, diagnostic tests, medication allergies.
11. Complete preceptor and self-evaluation in December to demonstrate self -assessment skills
12. Complete and Submit the End of Semester Reflective Write-up via email submission to LPP@umassmed.edu (due end of January).
13. Perform LPP Presentation in ECL small groups - spring semester
14. Gather the Complete History over the course of the semester: HPI, PMH, Meds, Allergies, FH, SH.
15. Discuss the components of Health Maintenance/Disease Screening for patients. system and notes - resources in FM 104 to present in DCS; give age-appropriate milestones, immunizations and screening.
16. Demonstrate counseling skills with a patient (e.g. smoking, exercise, diet).
17. Demonstrate components of the physical exam –vitals, HEENT, heart, lung abdomen, musculoskeletal, Neurological.
18. Develop and Discuss Problem Lists (listing findings, group findings, problem list), Assessment & Plans for one patient at each session. Review with your preceptor.

DETAILS OF LPP OBJECTIVES

(as provided to students)

1. **Communication Skills/Interviewing:** Observe your preceptor interviewing patients: how s/he introduces him/herself and opens the interview; how the four functions of the medical interview are addressed; how the chief complaint is characterized utilizing the seven cardinal features of the problem; how the preceptor addresses cultural issues and how they affect the patient/physician relationship. Observe how the patient perceives his/her illness and how the various cultural, emotional, and social perspectives through which the patient sees his/her illness influence the office encounter. Practice your interviewing skills (reflection, legitimization, partnership, respect and support) to develop a relationship with the patient and attend to their comfort during the interview.
2. **History of Present Illness/Complete History:** Practice obtaining the components of medical history, becoming comfortable with the questions and format that is traditionally used. We realize that performing a complete history, using all of the components at one time is a skill that develops over time. Therefore, early in the year we would like you to do as many of the components as you are able to with each patient that you interview. Refer to the components of the medical history in the appendix, for a more detailed review of the specific questions/information in each component. There are several components that comprise the medical history:
 - a. Chief complaint
 - b. History of Present Illness (HPI) – utilizing the 7 cardinal features
 - c. Past Medical History, Medications, Allergies
 - d. Family History
 - e. Social History
 - f. Review of Systems
3. **Demonstrate oral presentation skills:** This is one of the ways that you will be communicating with others regarding patients. The oral presentation is a basic skill that you will be utilizing throughout your career. This skill takes practice and the LPP setting is a great place to begin learning this skill. Discuss with your preceptor ways you can start practicing the oral presentation with the patients you are seeing. Have them demonstrate how they do an oral presentation.
4. **Observe the difference between a chronic/follow-up visit and acute illness visit: Identify** a patient with an acute illness and discuss with your preceptor how they approach this type of visit. Examples you may encounter include: Upper Respiratory infection, Earache, Sports injury. Identify a patient with a chronic illness and discuss it with your preceptor. Examples you may encounter include: Asthma, Neurodevelopment problems, and Cystic fibrosis in children; Hypertension, Diabetes, Psychiatric Conditions and COPD (Chronic obstructive pulmonary disease) in adults. Observe the different approaches they may use during the encounter. Also look for differences in how a preceptor approaches a well-established patient compared to a patient they have never met before.

5. **Participate in a Continuity Patient Encounter:** Discuss with your preceptor to see if the office could arrange a follow up appointment with a patient you have seen at a time when you will be back in the office. Observe the differences in the encounter when you see the same patient a second or third time. You may also want to see if that patient has other medical appointments within the healthcare system and ask to attend those as well. This could be visits with other specialists or other scheduled tests such as radiology procedures, cardiac testing, home visits, or pre-op testing. Not all practice settings (emergency department) are amenable to have continuity with the patients you are seeing so options would be to accompany a patient to the medical floor if admitted or visit them the following day. Patients always seem to remember students they have seen so look for the initial reaction they have when they see you again and get a feel for how you have already established some level of rapport with that patient.
6. **Describe the role of another member of the patient care team (IPE or Interprofessional Medical Education):** Working with members of the patient's health care team is a valuable experience. This will help you to understand the team members in your preceptor's office and the role they play in the patient's care. Examples could include spending some time with the triage nurse on the phones, working with the health assistants rooming the patients, spending time in the lab or radiology, or working with the front desk staff at registration.
7. **Electronic Health Record (EHR):** Most medical offices and hospitals now utilize some form of a medical record on EHR. Ask your preceptor to guide you through ways he/she uses the EHR in the care of their patients. This will be very helpful as you move into the in-patient setting during your hospital sessions. Try to find vital signs, medication lists, medication allergies, problem lists, health maintenance screening tests.
8. **WBAs:** Students will submit these to their Preceptor 3x/semester. See instructions on page 9&10. Preceptors should fill these out within 48 hours.
9. **End of Fall Semester Reflective Write-Up**
DUE January of each AY via email submission to the LPP mailbox at LPP@umassmed.edu which will be ECL small group leaders.

This is an opportunity for you to take some personal time to sit back and reflect on becoming a doctor and doctoring. Please complete a written narrative, reflecting on a specific experience or on your total experience to date with patients. Include any or all of the following reflections: How has working with patients affected you? How, if at all, has your perception of what a doctor is changed? How, if at all, has the way in which you would practice as a physician changed? Have you observed examples of patient advocacy where the doctor has done out of their way to help a patient? Feel free to comment on any other impact this experience has had on you, whether good or bad.

There is no required length to the write-up, but we encourage you to be thoughtful and complete. You may want to reflect on your experience over the winter break – so this component is not due until the end of January, but you are encouraged to complete it sooner. This writing assignment will not be shared with your preceptor (although you are certainly welcome to do so), but your ECL small group facilitators will have the opportunity to review and provide comments.

- 10. Gather the Complete History over the course of the semester: HPI, PMH, Meds, Allergies, FH, SH:** We realize that performing a complete history for one patient, using all of the components at one time, is a skill that develops over time. It can also be time-consuming. You will have a chance to do this in the hospital sessions next year. However, the LPP setting can be an excellent opportunity to start practicing this task. Observe your preceptor and how they manage to make a complete medical history of either a patient they already know or new patients they are seeing for the first time. Observe the different approaches for these patients. Discuss with your preceptor setting up a patient for you to practice the complete history.
- 11. Perform a Health Maintenance/Disease Screening visit:** Identify a patient who presents for a check-up (yearly health maintenance visit) and record on the *'Health Maintenance/Disease Screening Note'* that follows in the appendix. Prevention and screening examples you may encounter include a well child visit, cancer screening, immunizations, high risk population screening (e.g. HIV testing for those with high-risk behavior) or a variety of other issues (cholesterol, vision, hearing, dental, sun exposure). These visits will provide a basis for your DCS small group discussions. Review the health maintenance section on the patients EHR and observe how these screening indicators are recorded. Does the practice or the EHR have built in reminders to alert the provider or patients when something is due?
- 12. Demonstrate counseling skills with a patient:** You can discuss this with your preceptor to help find a patient that might need counseling to help change a behavior (e.g. smoking, diet, or exercise). You can utilize the skills you will learn in the spring semester in your DCS1 small groups on the 5 A's of counseling and motivational interviewing. You may want to role play this with your preceptor first before trying with a real patient.
- 13. Demonstrate components of the physical exam:** You will be introduced to physical exam skills in the Physical Diagnosis course which runs from November through February (vitals, HEENT, heart, lung abdomen, musculoskeletal, Neurological). However, be prepared with your stethoscope on your first visit. Your preceptor will likely introduce the physical exam early in your sessions so be prepared and take advantage of this clinical setting to practice your exam skills. Your preceptor may use different techniques from what you are learning in the physical diagnosis course. Also, discuss with your preceptor how they decide what exam to do? Is it a focused exam based on the HPI or the patients' medical history? Is it a yearly physical exam so all exam components are performed?
- 14. Develop and Discuss Problem List (list findings or group findings), Assessment and Plans:** As you progress through the year start working on this with your preceptor and complete these details on at least one patient per session. This is your opportunity to use critical thinking skills, i.e. putting it all together in terms of what the patient's problems are, how to evaluate them and how to treat them. Ask your preceptor to review with you. Ask how your preceptor uses the problem list. To help you problem solve a case, you may want to first list your findings and then group common elements so you can better understand what is going on and how best to develop an assessment and plan. These concepts will also be reviewed in your ECL small groups.

2023-2025 EVALUATION Rubric (as provided to students)

The following components are used to determine the LPP grade

LPP REQUIREMENTS IN ECL

1. Attend 12 Preceptor Sessions; send 6 WBA's
2. Review LPP Objectives Guideline
3. 6 WBAs per Academic Year
- 4. Complete a Reflective Write-up (due January each AY via email submission to the LPP@umassmed.edu mailbox, but feel free to turn in early.) These will go to LPP@umassmed.edu to be distributed to ECL small group leaders.**

TEACHING IN THE REAL WORLD
Tips for Integrating Learners into Busy Clinical Settings

Daniel Lasser, MD, MPH

By the end of this session, participants will be able to:

1. List five new ideas for efficient teaching in busy clinical settings;
2. Demonstrate that they can plan ahead for efficient clinical teaching; and
3. Actively participate in clinical teaching to a greater extent than previously.

*Sincere thanks to several hundred experienced clinical preceptors,
residents and students, who have contributed these “Teaching Tips”
at faculty development workshops over more than a decade*

University of Massachusetts Clinical Faculty Development Center © 2006 Teaching of Tomorrow

Introduction

- I. CAUTION: This session focuses on **Methods**
 - A. By focusing on teaching Methods, we can provide answers to practical questions:
 1. Don't educators know what it's like in the real world?
 2. How can you expect overworked clinicians to implement detailed educational paradigms in busy clinical settings?
 - B. There are many things that experienced preceptors ask learners to do that save them time while adding quality to their practice and their teaching. **However:**
 1. Methods are just one step in the Educational Planning Process
 - a) Goals
 - b) Needs
 - c) Objectives
 - d) Methods
 - e) Evaluation
 - C. One learner's teaching objective may be another learner's scut work.
 1. Be clear about what you are trying to accomplish
 2. Tell the learner that any time s/he helps to save will be made up in dedicated teaching time
 3. At least one experienced preceptor tells us that he says thank you at the end of each session
- II. How can you teach and practice at the same time? Start here: **It's similar to clinical practice: You don't need to do it all at once.**
 - A. Teaching in clinical settings is best accomplished in a longitudinal fashion
 - B. The needs of one's students cannot be fully satisfied at every moment throughout the day any more than the needs of one's patients, or practice
 - C. You don't need to apply all principles learned in faculty development at one time any more than you can do complete histories and physicals on all patients at all times
- III. General Principles
 - A. Plan ahead – work the learner into your weekly schedule
 - B. Plan an Orientation: Make certain all parties know the ground rules
 - C. Have learners do things that save you time and benefit your practice
 - D. Learn things from the student or resident
 - E. Think about the use of space
 - F. Some methods make it possible to teach on the fly
 - G. Tailor the schedule to meet clinical **and** teaching objectives
 - H. Take advantage of unique educational opportunities
 - I. Establish clear guidelines for communication
 - J. Use the medical record, and know the rules for student supervision

Tips for Teaching in the Office

IV. Planning

- A. Work the student into your weekly schedule – if you don't put it in the schedule, it won't happen
 - 1. Protected times for orientation, formal teaching, evaluation sessions
 - 2. Alternative activities when you are not available

V. Orientation

- A. Orient the student
 - 1. Pre-orientation: Invite the student to visit the practice
 - a) Is this right for you?
 - b) Are there certain criteria for the student (e.g. language skills in a Community Health Center)
 - 2. First day: plan a formal student orientation session
 - 3. Other times: Schedule protected times for teaching, feedback and evaluation
 - 4. Provide prepared materials
 - a) Give the student a written description of the practice – have a student write a description of the practice to be used with future students
 - b) Give the student a copy of your mission statement (larger health centers)
 - c) Establish a web site for students, or mention them on your practice web site
 - 5. Provide a written guideline of expectations
 - a) Logistics, including hours, parking, attire, use of your staff areas (including the refrigerator!), plans for lunch, etc.
 - b) Set progressive goals through the weeks – e.g. shadow, model, function independently, etc.
 - c) Expectations regarding patient confidentiality
 - 6. Orient the student to your life style
 - a) Personal – Bring the student home for dinner; share your personal perspectives with them
 - b) Professional – hospital committees, call, etc.
- B. Orient your patients
 - 1. Boast to your patients that you are a part of the medical school
 - 2. Put up a plaque, letter from the Dean, etc.
 - 3. Put up a notice that you have a student with you
 - 4. Provide a handout
 - a) “We have been selected as a teaching site by the medical school”
 - b) “You have the right to be seen without the student's involvement”
 - 5. Invite your patients to serve as teachers, and even to participate in evaluation:

- a) “Can you help me teach this student/resident?”
 - b) “This is the way I learned how to be a doctor”
6. Develop a questionnaire (or have a student develop a questionnaire):
Has the student been added to the visit?
 7. Provide a business card for the student
- C. Orient your staff
1. Invite them to become active participants in the learning process
 - a) How can each staff member contribute to the learner’s education?
 - b) Provide an opportunity for the staff to provide feedback
 2. Have a social gathering with the staff to introduce the student
 3. Set explicit guidelines for the staff
 - a) How will students be introduced to patients? Several opinions:
 - (1) Have the front desk tell patients about the student
 - (2) Have the front desk hand out a letter from you that explains about the student
 - (3) Have your office nurse handle the introduction
 - (4) Some feel that the physician should be actively involved in inviting the patient to work with the student
 4. How will patient permission be obtained?
 - a) Include a permission slip with your introductory letter
 - b) Have the staff do it
 - c) Have the physician get permission

- D. Orient yourself
1. Read the curriculum, readings
 2. Participate in faculty development

VI. Have learners do things that save you time and benefit your practice:

- A. Tell the student or resident that anything they can do to save time for both of you will be made up in active teaching time
- B. Office activities that can save you time:
 1. Take vitals
 2. Chart notes
 3. Talk to patients who are waiting when you are running behind – “it’s better than a magazine”
 4. Write prescription refills
 5. Write out patient instructions
 6. Go over written patient education materials
 7. Do asthma education
 8. Construct a genogram
 9. Go through the chart to see if health maintenance guidelines are up to date
- C. Working with younger patients -- perform Denver Developmental Testing

- D. Working with older patients:
 - 1. Perform Mini mental status exam
 - 2. Interview other caregivers
 - 3. Help elderly patients get dressed and undressed
 - 4. Talk to elderly patients
- E. Procedures – students need to be allowed to do things
 - 1. Phlebotomy
 - 2. Flushing ears
- F. Have a student do a special project
 - 1. Focusing on a patient or family that has been a puzzle for you
 - 2. Working on a project for your office
 - a) Developing patient education materials
 - b) Developing an evidence-based clinical guideline

VII. Learn things from the student

- A. Things the student will know better than you
 - 1. Use of a smartphone and computer resources
 - 2. Use of new drugs
 - 3. Issues raised at yesterday’s lecture
- B. Personal issues - About their culture, about their own life experiences
- C. Dealing with clinical problems about which you know little
 - 1. “Take a day and get back to me with an answer”
- D. Don’t feel threatened by a student who knows something you don’t know – neither party should confuse *information* with *knowledge*

VIII. Think about the use of space

- A. If an extra exam room is available, you can have the student use it, while you move ahead as needed
- B. Use your consult room for history taking
- C. Clear off a corner of your desk for the student to use
- D. Provide in and out boxes
- E. Use your partners’ desks; rotate desks on days off
- F. Get a TV table in your office for the student to use
- G. Move phlebotomy to the exam room

IX. Some methods make it possible to teach on the fly

- A. Have the student see the patient ahead of you
- B. Observe the student interviewing the patient
 - 1. Try not to interrupt

2. Stand so the patient has to look at the student

C. Active teaching in front of the patient

1. Works best
 - a) Present the history
 - b) Demonstrate skills: Physical exam, procedures
 - c) Patient education – an audience of two
 - d) Modeling

2. Think about how you use questions (Questioning vs. “pimping”)

From *The Art of Pimping* (JAMA 262(1), July 7, 1989): The earliest reference to pimping is attributed to Harvey in London in 1628. He laments his students’ lack of enthusiasm for learning the circulation of the blood: “they know nothing of Natural Philosophy, the pin-heads. Drunkards, sloths, their bellies filled with mead and ale. O that I might see them pimped!”

In 1889, Koch recorded a series of ‘Pumpfrage’, or ‘pimp questions’ he would later use on his rounds in Heidelberg. Unpublished notes made by Abraham Flexner on his visit to Johns Hopkins in 1916 yield the first American reference: “Rounded with Osler today. Riddles house officers with questions. Like a Gatling gun. Welch says students call it pimping. Delightful.”

3. Riskier
 - a) Complex problem solving
 - b) Differential diagnosis
 - c) Bad news

X. **Tailor the schedule to meet clinical *and* teaching objectives**

A. Schedule events that will help the student

1. Review the schedule, charts ahead of time
2. Double book the first slot
3. Know the curriculum requirements
 - a) Required complete H&P – schedule at a special time; have the patient come in early

B. Have the student spend time with others (assuming that you have involved others in setting educational objectives):

1. Have the student spend time with your practice partners, Nurse Practitioners, Physician Assistants
 - a) Have one serve as coordinator
2. Have the student spend time with people in your office, such as:
 - a) Office nurse -- give immunizations, participate in phone or office triage

- b) Health Educator
 - c) Phlebotomy
 - d) Health Assistant
 - e) Billing clerk
 - f) Referral coordinator
 - g) Receptionist/Appointment clerk
3. Have the student spend time with consultants in your building
 4. Have the student work with community resources, such as:
 - a) Nutritionist
 - b) Social worker
 - c) Visiting nurse
 - d) Outreach worker
 - e) Adult day care center
 - f) Nursing home
 - g) Pharmacy
 - h) Hospice
 - i) Health Department
 - j) Local sheriff, local law enforcement officials

C. Finding respite time

1. Send the student to read up on something that will come up later in the day
2. Develop a 4-day precepting week, with alternative activities developed by the clerkship during the 5th day
3. Have 2 students instead of one! (having a second student may be like having a second child)

XI. Take advantage of unique educational opportunities

- A. Share your own library or other reference resources – reprints, guidelines, etc.
- B. Identify patients with identified problems (diabetes, etc.) who are willing to act as special resources for students to spend time with
- C. Link the student with patients who will present frequently during the clerkship
 1. Newly diagnosed patients with diabetes, acutely ill patients with asthma, etc.
 2. Prenatal patients
 3. Other patients facing a transition in their life status
 4. Give the student a beeper to carry, to be available during a critical time
- D. Involve the student as you respond to patients who are acutely ill:
 1. Have the student phone patients who are calling in with acute illnesses
 2. Have the student make follow-up calls to check on patients you saw earlier
 3. Use a speakerphone
 4. Manage fewer acutely ill patients over the phone; have them come in
 5. When an acutely ill patient is coming in, have the student read up on the topic
- E. Involve the student in after-hours call

1. Use a conference-calling feature
- F. Involve the student as you respond to routine patient care issues:
1. Review phone messages with the student; include him/her in the response
 2. Review lab work with the student
 3. Have the student make phone calls to patients about lab results (first with normal results, then with abnormal results)
 4. Have the student respond to letters from the HMO regarding health maintenance, need for follow-up (by performing chart audits, etc.)
- G. Send the student off-site to accompany the patient
1. To see consultants
 2. To view procedures: Endoscopy, surgery, etc.
 3. To Radiology, OT/PT
 4. To accompany the visiting nurse
- H. Go together:
1. On rounds, to hospital conferences – Tumor conference, Grand Rounds, etc.
 2. To a deposition
 3. To the nursing home
 - a) Issue a challenge: Keep going until you find three medications to discontinue
- I. Community activities
1. Have the student write a patient education column for the local paper
 2. Have the student do a community project

XII. Establish clear guidelines for communication

- A. Communicate by phone – Give the student your home number, or the inside line for the practice
- B. Communicate via email – regarding logistics, to provide feedback
- C. Make your expectations explicit in your orientation handout

XIII. Using the medical record

- A. Have the student do chart reviews, or participate in QI projects
Provide an opportunity for the student to try dictation
 1. Works best for special projects
- B. Have the student type up notes, email them in
- C. Regarding documentation: Know the rules for student supervision

From the Medicare Carrier's Manual, Section 15016:

"Students may document services in the medical record. However, the documentation of an E&M service by a student that may be referred to by the teaching physician is limited to documentation related to the review of systems, past family, or social history.

”The teaching physician may not refer to a student’s documentation of physical exam findings or medical decision making in his or her personal note. If the medical student documents E&M services, the teaching physician must verify and re-document the history of present illness, as well as perform and re-document the physical exam and medical decision-making activities of the service.”

D. Some use student notes as prompts

XIV. Provide an orientation handout (next page)

Guidelines for Residents/Students Working with Dr. Jones¹

Ambulatory medicine differs from inpatient medicine in several important ways. These guidelines can help make your experience in my office more rewarding.

1. Please read the Curriculum Syllabus before coming to the office.
2. Office hours start at 8:40 am and finish at 5:00 pm. We usually take 45 minutes for lunch. Feel free to use the refrigerator to store a sandwich, etc.
3. Take time to browse through the printout of the schedule. Let us know if there were patients that you would particularly want to see
4. Seeing patients:
 - a. Most patients enjoy spending time with students. The nurse will tell each patient that you are working with us and obtain permission for you to participate in their care.
 - b. Pay particular attention to the patients’ name, age, the diagnosis, medications, and the periodic examinations needed.
 - c. Check the last progress notes in the chart, noting any items we need to check for follow-up; this will help you understand why the patient is here.
 - d. Introduce yourself as A Student Doctor _____, working with Dr. Jones.
 - e. Always examine the patient with me. We can listen to the heart, and to each side of the lungs, and compare notes. We can discuss your findings, which provides you with immediate feedback.
5. Saving time
 - a. Scheduling impacts doctors as well as patients; we will often feel squeezed for time. Anything you can do to help move things along will allow us more time for discussion.
 - b. Many of my patients are elderly; they may be moving slowly. Please assist them in getting on the exam table, undressing and dressing, and returning to the front desk.

¹ Modified from orientation sheet provided by Dr. Lynn Li, Primary Care/Geriatrics Division, University of Massachusetts Medical Center

- c. Always ask if the patient needs prescription refills. If they do, write them out for me to sign.
 - d. When we are giving instructions to the patient, please write them down. Patients appreciate having written instructions to take home with them.
6. Keep an index card or notepad handy so if anything is mentioned you are not sure of, you will be able to research it later in the day.
 7. Feel free to take vital signs and mark them in the chart. Many of my elderly patients need blood pressure monitoring, especially postural blood pressure measurements; orthostatic hypotension is common. The blood pressure and pulse should be measured while the patient is prone as well as sitting up.
 8. A complete geriatric assessment includes a medication check, a functional assessment, a life review and social history, a life-values assessment, and mini-mental and geriatric depression screenings. Examples of the Mini-Mental State and Geriatric Depression Scale forms are attached.
 9. You will learn to prioritize multiple needs in a time-limited clinical visit in order to keep to the schedule. You will learn how to deal with the patient's most important issue(s) today, bringing them back for anything else that needs to be dealt with. I set priority according to the following four areas of needs:
 - a. The patient's list of complaints;
 - b. My problem list and agenda;
 - c. Medication adjustments and refills; and
 - d. Health maintenance issues.
 10. When this rotation is finished, you will know how to give patient instructions, update the Problem List, and write progress notes.
 11. Please think about your personal goals and objectives for the rotation. Feel free to discuss issues as they arise. Keep yourself involved and active.

If you ever have questions that we did not answer in the clinic, do not hesitate to contact me in my office at 856-0000. I can also show you relevant reading material.

Have fun! Be active! We are here to work as a team!

APPENDICES

We are including these so that you see the materials that are taught to first year students.

Notes about medical history that students will find helpful and should refer to frequently!

WHY DO PEOPLE GO TO THE DOCTOR?

There are many reasons why people go to the doctor. In addition to the traditional “sick” visit, people also seek their physician for follow-up of chronic problems, and health maintenance. These visit types differ based upon patient age and sex. It is important to understand the physician’s responsibility for their patients’ health besides providing care when they are sick.

The following charts are a guide to understand why people go to the doctor, while not meant to be comprehensive – they provide an outline for what you will see in your preceptor’s office.

<u>CHILDREN</u>	<u>ADULTS</u>
1) Sick Visits	1) Chronic Problem
2) Health Maintenance/Screening (check-ups)	2) Sick Visits
3) Chronic Problems	3) Health Maintenance/Screen (check-ups)

Adults are seen more commonly for chronic problems - children more for sick visits and ‘check-ups’.

‘SICK’ VISIT examples

<u>CHILDREN</u>	<u>ADULTS</u>
1) Fever	1) Upper Respiratory infection
2) Otitis media/upper respiratory infection	2) Musculoskeletal injuries
3) Gastrointestinal distress	3) Gastrointestinal distress
4) Injuries	

CHRONIC DISEASE FOLLOW-UP VISITS

<u>CHILDREN</u>	<u>ADULTS</u>
1) Asthma	1) Hypertension
2) Neurodevelopment problems	2) Diabetes
	3) Psychiatric Conditions
	4) Asthma/COPD(Chronic obstructive pulmonary disease)

HEALTH MAINTENANCE / DISEASE SCREENING VISITS

<u>INFANTS/CHILDREN</u>	<u>ADULTS</u>
1) Immunization	1) Cancer Screening
2) Growth and Development	2) Chronic Disease Screening, (Hypertension, Diabetes, Hypercholesterolemia)
3) Safety Issues	3) Substance Abuse
4) Substance Abuse (Adolescents/Teens)	

Outline of the Complete Medical History and Write-up

I. Chief Complaint (CC)

II. History of Present Illness (HPI)

- A. 7 Cardinal Features of the presenting symptom (CC)
 - 1. Quality
 - 2. Location
 - 3. Chronology
 - 4. Setting and Onset
 - 5. Severity
 - 6. Modifying Factors
 - 7. Associated Symptoms

Include Pertinent Positives - a symptom, risk factor or risk behavior associated with pathological conditions presenting with such a chief complaint **which is present** in the patient.

Include Pertinent Negatives - a symptom, risk factor or risk behavior associated with pathological conditions presenting with such a chief complaint which **is absent** in the patient.

III. Past Medical and Past Surgical History (PMSH)

- A. Medical Illnesses/ Hospitalizations
- B. Surgical History
- C. Psychiatric History
- D. Childhood Illnesses
- D1. (Add Birth and Developmental History to a Pediatric History)
- E. Injuries
- F. Medications
- G. Allergies
- H. Transfusions
- I. Pregnancies

IV. Social History/Habits and Risk Behavior

- A. Birthplace
- B. Education
- C. Work and Work History including exposure to hazardous materials
- D. Marital/Relationship Status
- E. Quality/Quantity of Social Relationships
- F. Diet
- G. Exercise
- H. Tobacco Use
- I. Alcohol Use
- J. Drug Use
- K. Sexual Behaviors History
- L. Domestic Violence
- M. Injury Prevention (seat belts, bicycle helmets, etc.)

V. **Family History**

- A. Significant **Illnesses** in 2-3 generations of family – Document -
Ages and health status of **siblings**
Ages and health status of **parents**
Ages and health status of **grandparents**
Ages and health status of **children**
- B. Ask about Common **Diseases** with known genetic links
 - 1) familial incidence of arthritis, cancer, diabetes, hypertension, myocardial infarction, stroke, mental illness, alcoholism
 - 2) any other illness that **runs in the family**

VI. **Health Care Maintenance (Prevention and Screening)**

- A. Cancer Screening
- B. Immunizations
- C. High Risk Population Screening (e.g. HIV testing for those with high-risk behavior)
- D. Other (cholesterol, vision, hearing, dental, sun exposure)
- E. Health Care Proxy

VII. **Review of Systems (ROS)**

- | | |
|---------------------------|---------------------|
| A. Constitutional | B. Skin |
| C. Head | D. Eyes |
| E. Ears | F. Nose |
| G. Mouth | H. Throat |
| I. Breasts | J. Respiratory |
| K. Cardiovascular | L. Gastrointestinal |
| M. Urinary | N. Genital |
| O. Menstrual-Reproductive | P. Endocrine |
| Q. Musculoskeletal | R. Hematological |
| S. Nervous System | T. Psychiatric |

COMPONENTS OF THE MEDICAL HISTORY DESCRIBED

I. Chief Complaint (CC): The patient's stated reason for the medical encounter

II. History Present Illness (HPI): Characterize the chief complaint according to the principles of interviewing that you learned in the Physician Patient and Society course. This includes the 7 cardinal features of the symptom (quality, location, chronology, associated symptoms, modifying factors, setting and onset, and severity) as well as asking all questions in the past medical history (PMH), family history (FH), social history (SH) and review of systems (ROS) that directly relate to the chief complaint. Therefore, if a patient is experiencing shortness of breath, you should characterize the complaint and then include any pertinent PMH, FH, SH, and cardiorespiratory review of systems in your HPI since most causes of SOB can be traced to these two systems. Therefore, at the end of the HPI, it is worthwhile to ask yourself: *“have I characterized the chief complaint and asked the relevant questions from the appropriate past medical history, family history, social history and review of systems”?*

The HPI is the most demanding part of history. It details completely and concisely all of the features of the illness or symptom complex that brought the patient to the hospital or the physician's office. It should be detailed in chronological order and in literate fashion so that details and time sequence are understandable to the reader. This is a task of potentially extraordinary complexity. It requires that you get the full details as outlined above, as well as the care that the patient has sought for the symptoms, diagnostic tests performed, physician's and patient's impressions of the symptoms and the plan that has been outlined thus far.

While not expected for this course work, keep in mind during the time that you are doing clinical rotations, you will also be asked to review previous medical records to supplement the information that the patient has given you and confirm the details of the tests that the patient has had leading up to the hospitalization. While this list of questions and issues that need to be addressed seem to be daunting, they can all be seen as a part of the time course of the illness for which the patient presents.

Events should be related temporally but attention should be paid to the avoidance of skipping back and forth between the details of symptoms in different organ systems. If a patient has an illness that has multiple symptoms from different organ systems, it is often helpful to detail the symptoms separately followed by their time course, features, pertinent positives and negatives. In addition, if the patient has had multiple episodes of a symptom complex or multiple exacerbations of one disease, it is often helpful to get the full details of a typical episode, record the frequency of episodes and record how the current episode may differ from a typical episode if it does.

There clearly is judgment involved in deciding whether an item belongs in the HPI. A rule of thumb is to include all the symptoms from the Review of Systems in which the patient's chief complaint falls as well as any diseases that relate to that system. As you take the history and form ideas or hypotheses about what disease entities that the symptoms might represent, be careful to then include questions from the systems that these diseases involve. This requires that you begin to integrate the knowledge that you have gained in the Pathophysiology course with the symptoms that the patient reports to you. You should not include the details of illnesses that are not related to the HPI here as this information belongs to the PMH.

III. Past Medical History (PMH): In this section, you should detail the patient's previous medical and surgical problems. To be included in this section, it should be a clear diagnosis, not only a symptom or symptom complex. In addition, if a patient tells you that they have had a certain disease; you should typically ask about the presenting symptoms, diagnostic tests used to arrive at the diagnosis, and subsequent course of the disease. This information allows you to include only clearly established diagnoses. The more varied that the disease presentation can be, the more critical it is that you record the details completely. You can use a shorthand method of recording the PMH/PSH by listing the diagnosis followed by the date that the diagnosis was made and the details that you have collected. An example is given below.

- a. Essential Hypertension - 1986, diagnosed on routine PE, without complications, treated with ACE Inhibitor, Vasotec
- b. Systemic Lupus Erythematosus - 1989, presenting with diffuse arthralgia and arthritis as well as skin rash, diagnosed clinically and treated with Naprosyn for his/her joint pain

Also included in this section are numerous subheadings that pertain to previous problems or health history. These include:

- a. Past Illness (examples above)
- b. Past Surgeries
- c. Childhood Illnesses
- d. Injuries
- e. Immunizations
- f. Allergies (include a description of the reaction)
- g. Transfusions
- h. Pregnancies
- i. Medications - include doses and frequency

IV. Family History (FH): Diseases that can be inherited are a critical part of history. You should record the health status and health problems, concentrating on those that are known to have genetic links, of the patient's grandparents, parents, siblings and children. If any of these persons are deceased, record the cause of death and the age at which that occurred. While the history of the grandparents may be hard to obtain, it is important to attempt to get information for at least two generations of the family that have lived long enough to get heritable diseases. This can be recorded in long hand or in family tree format being sure to identify which one is the patient if a family tree is used. In addition to whatever format is being utilized, you should also ask about the major disease categories that are known to have genetic links such as Diabetes Mellitus, Hypertension, Myocardial Infarction, Stroke, Arthritis, Asthma and Cancer.

V. Social History (SH): This section should attempt to detail prominent features in the life of the person that you are examining. It should include a comment on where the person was born, when and how they came to be in their current community, their marital status, current work, some comment on the quality and quantity of their social relationships and their means of emotional support. By convention, this is the section of the write-up where the history of smoking, alcohol, sexual history, and drug use history are recorded.

VI. Review of Systems (ROS): This is a systematic, comprehensive review of multiple symptoms that the patient may have experienced. The areas that you have to question can be conveniently grouped according to the pathophysiological system in which they fall. A list of systems follows this section. There are several critical items that need to be mentioned with regard to the recording of the ROS in the writeup. If a patient tells you that they have experienced a certain symptom, pursue that positive answer to determine whether it is a current problem, an acute problem that will need attention during this visit, or a fleeting or past problem that does not require attention at all. Do not simply record that symptom as "positive." Conversely, it does not suffice to describe the whole- system as negative while not recording the items that you asked the patient. This is the case because recording the system as negative does not adequately characterize what items you asked the patient about. This is generally referred to as "pertinent positive" and "pertinent negative" review of system as applied to the chief complaint.

A NOTE ABOUT TIMING - ROS questions are asked in many situations. It is important to be clear why you are asking them, and what time period you want the patient to consider in answering the question. If the patient is an outpatient who you will follow over time, you are really asking whether a patient has had significant symptoms recently (and in some circumstances like hemoptysis or sudden asymmetric weakness or loss of consciousness, ever), and then pursuing enough detail to determine

whether you might be able to make a diagnosis or need to do some tests, or be aware of these symptoms for a later visit. If the patient is an inpatient who you will follow during the hospitalization, your question really has to do with whether the patient has experienced symptoms in ROS recently, and significantly enough that you need to focus on it (either testing or treatment) during this hospitalization. You are not asking whether a patient has ever had a rash, or ever had epistaxis (bloody nose) or heartburn

What follows is a list of questions from various organ systems that should be addressed in the ROS.

1. **CONSTITUTIONAL SYMPTOMS:** Fever, night sweats, chills, fatigue, anorexia, insomnia, weight change, weakness, irritability.
2. **SKIN:** Change in moisture, temperature, color or texture, lesions, rashes, itching, bruising, bleeding disorders, changes in hair or nails.
3. **HEAD:** Change in head size, headache, trauma.
4. **EYES: Vision** changes, glasses, blurring, eye pain, diplopia (double vision), scotomata (blind spots), flashes of lights, injury, irritation, discharge, photophobia, excessive tearing.
5. **EARS: Hearing** loss, pain, infections, discharge, tinnitus, vertigo.
6. **NOSE: Dryness,** bleeding, pain, discharge, coryza, epistaxis, obstruction, sinus pain, change in smell.
7. **MOUTH: Condition** of teeth, pain in mouth or tongue, bleeding gums, lesions in mouth, tongue or lips.
8. **THROAT: Soreness,** hoarseness, dysphagia.
9. **BREASTS:** (both sexes) Pain, swelling, discharge, masses.
10. **RESPIRATORY:** Cough (acute or chronic), sputum production, hemoptysis, dyspnea, wheezing, chest pain, pleurisy, orthopnea.
11. **CARDIOVASCULAR SYSTEM:** Chest pain, exertional dyspnea (shortness of breath), paroxysmal nocturnal dyspnea, orthopnea, palpitations, syncope, peripheral edema, cyanosis, murmur, intermittent claudication, Raynaud's phenomenon, varicose veins, phlebitis.
12. **GASTRO-INTESTINAL TRACT:** Dysphagia, odynophagia, appetite, heart burn (acid indigestion), eructation (belching), regurgitation, bloating, abdominal pain or discomfort, fullness, distention, pain, nausea, vomiting, hematemesis, jaundice, bowel habit change, rectal pain, hemorrhoids, hernia, hematochezia, melena, diarrhea, constipation.
13. **URINARY SYSTEMS:** Dysuria, frequency, urgency, polyuria, nocturia, incontinence, flank pain, hematuria, retention, dribbling, hesitancy, poor stream, back or costovertebral angle (CVA) tenderness.

14. GENITAL SYSTEM:

- a. Gynecological: discharge, itching, genital lesions
- b. Male Genitalia: pain, lumps, urethral discharge, testicular pain or swelling
- c. Sexual Problems: dissatisfaction, dyspareunia, potency, recent change in pattern.

15. MENSTRUAL-REPRODUCTIVE HISTORY: Dysmenorrhea, intermenstrual bleeding, changes in cycle, amenorrhea, menorrhagia, metrorrhagia. Peri-menopausal symptoms like hot flashes, sweating, post-menopausal bleeding. Emotional reaction to menarche and menopause.

16. ENDOCRINE SYSTEM: General (weight change, easy fatigue, behavioral changes), thyroid disease (goiter, heat or cold intolerance, sweating, exophthalmos, tremor, skin and hair changes), diabetes (polyuria, polydipsia, vaginal discharge and itching, skin infections), pituitary disease (change of facial features, hands, feet). Secondary sex characteristics, habitus, hair distribution. Impotence, libido, sterility.

17. MUSCULO-SKELETAL SYSTEM: Bone pain, tenderness, swelling, stiffness, limitation of movement of neck, trunk, extremities. Weakness. Trauma, fracture. Swelling backache and leg cramps.

18. HEMATOLOGICAL: Lymph node enlargement, pain, bleeding, bruising.

19. NERVOUS SYSTEM: Syncope (faint), dizziness, convulsions, vertigo, difficulty with speech or swallowing, localized or generalized symptoms, tremor, weakness, pain, numbness, paresthesia, incoordination, difficulty with bladder or bowel control.

a. Cranial nerve symptoms: change in smell, Diplopia, change in vision, blind spots, difficulty with speech, swallowing, or chewing, facial numbness or drooping, change in hearing, tinnitus

b. Motor system: paralysis, atrophy, involuntary movements, seizures, gait, incoordination

c. Sensory system: pain, paresthesia, hyperesthesia, anesthesia

d. Mentation: orientation, memory. Reading and writing. Loss of consciousness.

20. PSYCHIATRIC: Rapid changes in mood, memory loss, phobias, hallucinations, sleep disturbances, problems with coping, suicide, (attempts or thoughts), anhedonia, frequent crying

Review of Systems - Lay terms

GENERAL: Any problems with your sleep? energy level? appetite? Any recent change in your weight? Any fever, chills? Any problem with excess thirst? Does the heat or cold bother you more than it bothers most people?

SKIN: Any problem with your skin...itching, bruising, growths? changes in moles or a freckle? Any problem with skin moisture...too dry, too oily?

HEAD: Any problem with headaches, dizziness, blackouts?

EYES: Do you have any trouble with your vision? blurred vision? double vision? Do you ever see spots or flashes? Any problem with discharge, redness, itchiness, or tearing?
Do bright lights bother your eyes?

EARS: Do you have any difficulty with your hearing or ringing in your ears? pain in your ears? itching? drainage? Do you have any difficulty with dizziness? a sensation that the room is spinning around you?

NOSE/THROAT/MOUTH: Any mouth or throat problems...hoarseness, difficulty swallowing, pain, or swelling? Any problems with your teeth or gums?

BREASTS: Any problems with pain, swelling in your breast? Any discharge? lumps?

RESPIRATORY: Do you get short of breath or have pain with breathing? Do you get short of breath with activity? Do you ever wheeze? Do you ever wake up at night short of breath? (Can you go up one/two flights of stairs without stopping? Would you have to stop to catch your breath at the top?) Do you cough up phlegm or blood?

CARDIOVASCULAR: Do you ever have chest pain? Do you ever wake up in the middle of the night short of breath? Have you increased the number of pillows that you sleep on to help you breath at night? Do you have skipped or rapid beating of your heart? Have you ever passed out? Do you have a problem with swelling or cramping in your legs? Have you ever noticed a color change in your fingers or toes when exposed to cold temperatures? Do you have varicose veins

GI: Do you ever have trouble swallowing or painful swallowing? Any problems with heartburn? Have you been sick to your stomach? Have you vomited? ever vomited blood? Do you have belly pain, cramps or bloating? Any problems with bowel movements? (Diarrhea? Constipation? Noticed any blood in your stools or black or tarry stools.

GU: Do you have any problems with urination? (Any burning when you pass your urine? Are you passing urine more frequently? When you feel the urge to urinate, do you feel like you have to go right away? Is the force of your urine stream as strong as it always was? Do you have incontinence...trouble controlling your urine?) Do you have or have you had blood in your urine?

GENITAL SYSTEM:

- a. Gynecological - Do you have any vaginal discharge, itching, growths or lumps?

- b. Male Genitalia - Do you have any discharge from your penis? pain, lumps, or growths? testicular pain or swelling?
- c. Sexual Problems - Are you satisfied with your sexual function? What difficulties do you have, if any? Has your desire for sexual activity changed recently? Do you have pain with intercourse?

MENSTRUAL-REPRODUCTIVE HISTORY: Do you have any difficulties with your periods? pain? bleeding between periods? irregular cycles? intervals without periods? heavy bleeding? prolonged periods? Have your periods stopped? Are you having any hot flashes or sweating as your periods are changing? bleeding after menopause completed? Do you have any emotional reactions to beginning (menarche) or ending your periods (menopause)?

ENDOCRINE SYSTEM: Do you have any change in weight? energy level? unexplained changes in behavior? Any neck growths? feelings of warmth or cold when others are not? excessive sweating? eye bulging? shaking of your hands that is not voluntary? loss or thinning of hair? Any excessive thirst? frequency of urination? Any change in facial features/appearance? size of hands or feet? Any loss of pubic hair? hair growth in locations you haven't had it before?

MUSCULO-SKELETAL SYSTEM: Do you have any bony pain? tenderness? joint pain? swelling? or stiffness? Do you have limited movement of any joint or in neck/back that seems greater than others? Do you have any weakness? back pain?

HEMATOLOGICAL: Do you have any lumps in your neck? under your arms? or in your groin? History of bleeding or bruising?

NERVOUS SYSTEM: Do you have any fainting, dizziness, convulsions/seizures or "fits"? difficulty with or change in speech? swallowing? hand or head shaking that isn't voluntary? localized weakness, pain, numbness or tingling? difficulty with balance? bladder or bowel control?

- a. Cranial nerve symptoms - Do you have any change in smell? vision (double vision, blurry vision?) speech, swallowing, chewing? Any drooping of the face or eyes? change in hearing? ringing or buzzing in your ears?
- b. Motor system - Any paralyzed part of the body? loss of muscle bulk? involuntary movements? difficulty with walking? coordination?
- c. Sensory system - Any pain, numbness, tingling, or increased sensitivity of a body part?
- d. Mentation - Any change in your thinking? sense of where you are? your memory? reading or writing ability?

PSYCHIATRIC: Any change in mood? new fears/phobias? Do you ever see or hear things that aren't there? Do you have any difficulty sleeping? coping with life stresses? feelings about ending your life? plans to end your life? Do you cry frequently and for no reason? Do you no longer get pleasure from things that used to give you pleasure?

GUIDELINES FOR ORAL PRESENTATIONS (for case-type presentation) for ECL

Chief Complaint/Opening Line/Orienting Statement , includes identifying information and the chief complaint

HPI-should reflect the chief complaint, its features (7 cardinal features)

You should at least detail:

1. The seven cardinal features of the presenting symptom.
2. PMH that could be related to diseases that present with the chief complaint
3. FH that could be related to the chief complaint
4. SH that could be related to the chief complaint
5. Summary statement
 - a. Must start with pt demographics (Gender, Age) and end summary sentence with as much of a “commitment” your proposed diagnosis as you are able to give at your level of training.

Chief Complaint/Opening Line/Orienting Statement , includes identifying information and the chief complaint (see opening line notes below, which chiefly pertain to DCS2)

Your opening line will vary depending on the audience, the situation, and the purpose of the presentation. It should orient the listener to key elements of the chief complaint and how it relates to the broader case. Consider the following situations.

1. In a new patient who presents with symptoms of cough, you should make sure that the chief complaint is in the first sentence of your presentation. “This is a 32-year-old man who presents to the hospital with shortness of breath and cough.”
2. You do not need to present all the details of the Past Medical History in the first line of the presentation, but you should consider whether some aspects of the medical history would influence the listener’s thinking and is **so** important that you should include it in the first sentence. For example, one would think differently if the opening line of the presentation above were: “This is a 32-year-old man with a 12-year history of HIV infection and progression to AIDS who now presents with shortness of breath and cough.”

HPI-should reflect the chief complaint, its features (7 cardinal features)

You should at least detail:

- The seven cardinal features of the presenting symptom.
- Pertinent Review of Systems (ROS questions from the system(s) in which chief complaint may fall)
- PMH that could be related to diseases that present with the chief complaint
- FH that could be related to the chief complaint
- SH that could be related to the chief complaint
- Condition specific data- detailed (disease based) information about specific conditions that don’t fit into above categories (nausea in patient with headache is something that you likely need to think of migraine or elevated intracranial pressure which then makes you ask and then report on nausea.)

NOTE: Risk factors for disorders that could present with the chief complaint is a broad term that includes items from many of the above categories (something from the PMH, FH, SH, or medications that makes a particular diagnosis more likely, i.e. heavy drinking from SH or aspirin from medications are risk factors for a bleeding ulcer. FH of MI or PMH of HTN are risk factors for MI).

NOTE: Collectively, the information beyond the 7 cardinal features represents **pertinent positives** (pertinent positive is a symptom, risk factor or risk behavior associated with pathological conditions

presenting with such a chief complaint that is present in the patient) and **pertinent negatives** (pertinent negative is a symptom, risk factor, or risk behavior associated with pathological conditions presenting with such a chief complaint that is absent in the patient). The pertinent positives and negatives depend on your knowledge of pathophysiology.

Medications*-list the medication and doses that the patient is taking.

Allergies*-list agent and type of reaction.

By the end of the HPI presentation, the listener should have some idea of the diagnostic possibilities that you are considering.

*Some advocate for presenting Meds/allergies in all patients to encourage you to think about whether meds or allergies could be related to HPI

Summary statement

- Must start with pt demographics (Gender, Age)
- Most pertinent PMH, FH, SH, i.e. if is immediately related to the chief complaint
- End summary sentence with as much of a “commitment” to your proposed diagnosis as you are able to give at your level of training. For instance, in the case above, you may say “32-year-old male with a 12-year history of AIDS who now presents with fever and cough (will add physical exam and labs as you perform more complete exams), suspicious for PCP pneumonia”. You may only be able to narrow down your most likely diagnosis after the history and physical (you will likely be doing more, i.e. labs, XRAYs, to further clarify). For instance, “18-month-old full term male with 2 days of cough and wheeze, and now 1 day of increased work of breathing, consistent with either asthma or bronchiolitis”
- Do not have your summary statement be a rehashing of the HPI!

Adaptations for the Complete Presentation

If oral presentation is a complete presentation of a full History and Physical (like you will perform in DCS2 Hospital sessions and in the clinical years), you will present full details of PMH, Meds/All, FH, SH, ROS in more complete fashion, but with less detail than information from these categories that are related to the HPI

Review of systems-for the presentation; you should only give those positive symptoms that will need to be addressed during the admission or at the end of the outpatient visit. Physical

Examination-patient’s general appearance (uncomfortable appearing woman in respiratory distress), a complete set of vitals, all parts of the exam that could have abnormalities produced by diseases that are on your differential.

PROBLEM LIST, ASSESSMENT AND PLAN

After you have written up a complete history, ROS, physical exam, and labs, the problem list, assessment and plan is what comes next.

Below is a description and examples for each component.

Problem List

Those issues which the patient and/or you identify as concerns. These may be physical, psychological or social. There may be several at each visit.

Example:

1. Chest pain
2. Weight gain
3. Tobacco Abuse

Assessment

This is what you think is causing the problem (i.e. the diagnosis) or a list of multiple possible causes (i.e. the differential diagnosis).

Example:

1. Chest pain - atypical in nature, heartburn-like, occurring only supine easily relieved with antacids. Differential diagnosis includes: GI - probably GERD, most likely because of previous mentioned characteristics, musculoskeletal - still most likely GI but given chest wall tender to palpation on exam suggests component of costochondritis (inflammation of joint spaces between sternum and ribs) as well, cardiac - but less likely because no significant risk factors and atypical pain, pulmonary - very unlikely, no symptoms referable to this system.
2. Weight gain - the patient does not watch diet or exercise regularly. (note - not a diagnosis but a description of the cause)
3. Tobacco abuse - long-time smoker, does not want to quit. (note - not a diagnosis but a description of the pattern)

Plan

This is what you are going to do about each problem. This includes diagnostic test, if indicated, and treatment.

Example:

1. Chest pain
 - start H2 blocker
 - call in 2 weeks to report progress
 - will hold NSAIDS for now for costochondritis till reflux improved
 - follow-up as indicated, may need UGI if no significant improvement with H2 blocker

2. Weight gain
 - patient interested in starting weight watchers, encouraged to do so
 - patient agrees to daily walking program of twenty minutes
 - return visit 3 months

3. Tobacco abuse
 - long discussion with patient regarding importance of quitting, patient unwilling to quit at this time,
 - will discuss at future appointments

Put it all together and it looks like this:

1. Chest pain - atypical in nature, heartburn-like, occurring only supine, easily relieved with antacids. Differential diagnosis includes: GI - probably GERD, most likely because of previous mentioned characteristics, musculoskeletal - still most likely GI but given chest wall tender to palpation on exam suggests component of costochondritis (inflammation of joint spaces between sternum and ribs) as well, cardiac - but less likely because no significant risk factors and atypical pain, pulmonary - very unlikely, no symptoms referable to this system
 - start H2 blocker
 - call in 2 weeks to report progress
 - will hold NSAIDS for now for costochondritis till reflux improved
 - follow-up as indicated, may need UGI if no significant improvement with H2 blocker

2. Weight gain - patient does not watch diet or exercise regularly
 - patient interested in started weight watchers, encouraged to do so
 - patient agrees to daily walking program of twenty minutes
 - return visit 3 months

3. Tobacco abuse - long-time smoker, does not want to quit
 - long discussion with patient regarding importance of quitting, patient unwilling to quit at this time, will discuss at future appointments

H2 Blockers – acid blocking medications such as ranitidine (Zantac)

GI - gastrointestinal

UGI – upper gastrointestinal series – x-ray study to rule out ulcers or gastritis

GERD – Gastroesophageal reflux disease

NSAIDs – non-steroidal anti-inflammatory drugs – such as ibuprofen (Motrin, Advil).