



SBL Observer Evaluation

By Preceptor

Observer name: _____

Preceptor name: _____

Medical Practice of Observership: _____

Start date: ____/____/____

End date: ____/____/____

Basis of evaluation:

Personal observation: Yes No

Additional input from? _____

	Needs Improvement	Acceptable	Strong
Overall Level of Knowledge	May encounter problems in achieving required performance levels	Has or can be expected to achieve required performance levels	Already demonstrates performance at or above required performance levels
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Knowledge – basic medical science	Significant deficits in knowledge of relevant anatomy and physiology; trouble recalling or applying principles of basic sciences in clinical settings	Working knowledge of relevant anatomy and physiology; adequate recall of basic principles of clinically relevant basic sciences	Solid grasp of relevant anatomy and physiology, demonstrates evidence of regular application of principles of all basic sciences to clinically relevant situations
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Knowledge – clinical science	Lacks basic understanding of principles of clinical medicine including basic pathophysiology and therapeutics	Good grasp of principles of clinical medicine despite some gaps consistent with limited experience or level of training	Clear understanding of clinical medical principles, consistently able to articulate pathophysiology and relate to logical

			diagnostics and therapeutics
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Knowledge – medical education resources	Familiarity with standard textbook and references is incomplete; difficulty accessing medical literature and searching and retrieving relevant information; interpretation of study results often flawed	Is familiar with standard textbooks and references, can access medical literature both in library and electronically, can search and retrieve relevant information, can interpret results of studies	Well versed and familiar with all components of medical literature including standard texts, references, and peer-reviewed journals; searches are focused and efficient and consistently retrieve relevant information; critically appraises results of studies
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Knowledge – health care system	Often appears confused by elements of US Healthcare system, has trouble integrating new elements even with a appropriate explanation, may be unaware of significant components; oblivious to or confused by health care financing system	Demonstrates basic understanding of the US Healthcare system, able to integrate new elements with appropriate explanation, comfortable with most commonly encountered elements, basic appreciation of implication of healthcare system	Demonstrates clear understanding of the US Healthcare system, able to effectively relate components including those less frequently encountered; demonstrates and expresses awareness of implications of health care financing system
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Knowledge – US Formulary	Often appears confused by names, dosages, and indications for commonly used drugs in US formulary; frequently using names of drugs from prior education or practice setting; little or	Can apply basic knowledge of clinical pharmacology to identifying appropriate drugs in US formularies that may differ in name, dosages, or	Demonstrates sound knowledge of names, dosages, and indications of all commonly used drugs in US formulary with no evidence of confusion

	no familiarity with pharmacological references	indications from those in their prior country of training or practice; some familiarity with pharmacological references	with drugs used previously; facility with using pharmacological references
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Skills – clinical skills – medical history	Beginning with specifics not related to CC or HPI; makes no effort to clarify unintelligible or inadequate answers, reasonable associations of symptoms not pursued; ignores obvious risk factors;	Starts with specifics but those identified in CC or HIP; reposes questions to inadequate answers; broad pursuit of potential related symptoms but not necessarily specific to case; generally explores common risk factors; follows up on most important information; questions in some order and lead from general to specific	Initially broad inquiries followed by specifics as indicated by CC and HPI, rephrases patient responses or offers similes to clarify inadequate answers; sequential questioning of associated symptoms and pursuit of associations which may not be intuitive, thoroughly explores all risk factors, selective use of follow up questions with deeper probing of critical information; clearly organized pattern of questions from general to specific
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Communication – patients and families	May express impatience with difficulties in understanding or being understood; may use medical jargon without explanation; may convey disdain toward some; critical of beliefs or attitudes that do not confirm to own	Makes efforts to understand and be understood; rarely uses medical jargon; generally respectful in addressing; is open to diverse beliefs and attitudes toward health	Consistently confirms that understanding is clear by repetition, soliciting questions; explains any medical terminology used; always respectful in addressing genuine effort to understand and respect diverse beliefs and attitudes

<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Communication – nursing and ancillary staff	Shows little interest in understanding role and expertise of staff; rarely if ever approaches staff for help or information and may ignore or dismiss suggestions when made; may be disrespectful or make disparaging remarks about staff; quick to blame staff for lack of knowledge or performance	Acknowledges role and expertise of staff and accepts suggestions; may occasionally approach staff for help or information; treats staff with respect, rarely criticizes or blames staff for lack of knowledge or performance	Makes efforts to learn the role and expertise of staff; actively solicits staff information and help and takes suggestions gracefully; treats staff respectfully as colleagues, often compliments staff on knowledge and skill
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Clinical skills - communication – spoken English proficiency	Frequent problems with comprehension and understanding due to rate of speech, extreme accent or errors in syntax, little or no effort to adapt to listeners or clarify, may become annoyed or upset when misunderstood	Generally comprehensive, accent may be obvious but not problematic, makes effort to adapt rate of speech and pronunciation to listener, may attempt to incorporate idioms although not always successful	Virtually no difficulty in comprehension even if accent is present, confirms understanding of listener by repetition or clarification as necessary, reasonable facility with incorporation of idioms
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Clinical skills – communication - written	Handwritten entries frequently illegible, spelling and syntax errors hamper comprehensibility; essentially unable to enter material via keyboard or does so with multiple unproofed errors	Handwritten entries are legible, occasional spelling and syntax errors; entry by keyboard may be slow and error prone but final drafts are reasonably proofed	Handwriting consistently legible with accurate spelling and syntax; proficient at typing with few errors and final proof near perfect
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong

Skills – information technology skills – electronic medical records	Has recurrent difficulty accessing electronic medical records, often unable to locate relevant information, unable to enter clinical information or does so with frequent errors of format or location	Is able to access electronic medical records and locate relevant information, is able to appropriately enter basic clinical information into electronic medical records	Easily and efficiently accesses and moves about within electronic medical records to locate and retrieve information and to enter information in appropriate locations and formats
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Skills – IT skills – information retrieval – clinical data	Frequently unable to retrieve current laboratory results or radiology reports or retrieves erroneous information, e.g. wrong patient	Can generally retrieve current laboratory results and radiology reports	Facility with retrieving not only current laboratory results and radiology reports but also with accessing older and archived materials
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Skills – IT skills – information retrieval – reference material	Has difficulty accessing electronic and web-based resources, frequently unable to retrieve necessary information, unfamiliar with or unable to effectively use search engines	Can retrieve necessary information from electronic and web-based resources, can construct and carry out reasonable searching using PubMed or other search engines	Facility with retrieving key information from electronic and web-based resources, frequently in real-time and at point of services; uses PubMed or other search engines to conduct efficient , comprehensive searches
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Skills – presentation skills - patient presentations	Presentation of patients is disorganized with significant relevant information lacking, results of diagnostics not presented or presented in confusing or unclear manner	Presents patients following traditional format, includes relevant information and results of diagnostics, responds appropriately to questions	Presents patients following clear and logical format, relevant information includes pertinent positive and negative results of diagnostic tests presented with

			proposed interpretations, highly receptive to questions and comments
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Skills – presentation skills – educational presentations	Assigned topic may be misconstrued or unfocused, only rudimentary material presented, no or ineffective AV materials; unable to respond to many questions	Presents topics as assigned, includes basic required information, presentation is logical, AV materials are appropriate, able to respond to most questions	Focuses assigned topic for maximal relevance, materials beyond basics as appropriate, AV materials significantly contribute to presentation, confidently takes questions and responds appropriately
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Professional qualities - integrity	May be evasive when lacking information, may fabricate answers to avoid embarrassment, may attempt to take credit for accomplishments of others	Consistently honest, does not fabricate answers if does not know, does not take credit for things done by others	Unwaveringly honest, readily admits and may even volunteer when lacking information or answers, acknowledges accomplishments of others, may minimize credit for own accomplishments
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Professional qualities - tolerance	Frequently has or expresses negative judgments regarding groups or types of people, may use derogatory terms, rejects validity of different perspectives even when explained	Accepts people of diverse backgrounds, does not express negative judgments or use derogatory terms, acknowledges validity of differing perspectives when explained	Actively attempts to understand perspectives and values of diverse groups, makes efforts to maintain sensitivity to cultural and other interpersonal issues
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			

	Needs Improvement	Acceptable	Strong
Professional qualities - confidentiality	Expresses resistance to or dismissiveness regarding principles of confidentiality, may be careless with patient related documents, frequently discusses patient information in unsecured areas	Understands and accepts principles of confidentiality, generally careful with patient related documents, may occasionally reference patient information in unsecured areas	Values and respects principles of confidentiality, consistently conscientious regarding patient related documents, never discusses patient information in unsecured areas
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Professional qualities - punctuality	Frequently or persistently late for scheduled activities, considers tardiness not a significant issue	Generally on time for scheduled activities, understands and accepts the importance of punctuality	Always on time for scheduled activities, may even make a point of arriving a few minutes early, may articulate respect for others which punctuality bespeaks
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Professional qualities - reliability	Fails to complete tasks assigned or requires repeated reminders and prodding, materials delivered may be inappropriate to requests and / or of unacceptable quality	Generally completes tasks assigned, rarely needs to be reminded or prodded, produces materials consistent with requests and of acceptable quality	Consistently completes tasks assigned on or before due dates with no need for reminders, materials produced consistently meet and often exceed specifications, all work is of highest quality
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Professional qualities - initiative	Has difficulty gathering information or completing tasks even after extensive directions, rarely or never initiates proposals or offers suggestions	After adequate directions subsequently is able to gather information or complete tasks with minimal additional guidance, sometimes	Can gather information and complete tasks after only minimal initial direction, consistently initiates proposals and offers suggestions, seeks

		initiate proposals or offers suggestions	creative solutions to problems
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Professional qualities - participation	Makes minimal or no contribution to discussions even when invited or makes inappropriate or overly aggressive attempts to dominate discussions	Makes effort to participate in discussions and activities although may sometimes require some drawing out or may occasionally tend to be overly or inappropriately verbose	Consistently contributes meaningfully to discussions while evidencing respect for input of others, can appropriately gear level of participation to nature of discussions
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Professional qualities - teamwork	Has great difficulty functioning in a team framework, may express significant skepticism of the team concept or resistance to its implementation, recurring problem with deferring to other team	After adequate introduction, can function appropriately within a team framework, although may have some confusion regarding team concept or resistance to deferring to other team members	A natural team player, evidences mutual respect and support of all team members, able to defer or lead as appropriate, actively acknowledges contributions of other team
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Professional qualities – receptivity to feedback	May become overly defensive if receives negative feedback, tends to make excuses and blame others, rarely if ever actively seeks feedback	Can accept and respond to both negative and positive feedback although may evidence minimal defensiveness, generally only seeks feedback following errors or difficulties	Consistently solicits feedback both negative and positive, never defensive or blaming of others for shortcomings, actively attempts to correct problems and initiates follow-up feedback
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			

	Needs Improvement	Acceptable	Strong
Professional qualities - mindfulness	Fails to recognize limits of knowledge and skills even when clearly exceeded, unaware of strengths or weaknesses, oblivious to prejudices, and not capable of self-reflection	Can generally recognize limits of knowledge and skills when challenged, evidences awareness of strengths and weaknesses and prejudices, capable of self-reflection but generally only when asked to do so	Accurate and realistic recognition of limits of knowledge and skills, modestly acknowledges strengths while actively working on weaknesses, identifies and resists personal prejudices, regularly engages in self-reflection
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Professional qualities - dedication	Pursuit of knowledge and skills in medicine is often secondary to personal issues, tends to minimize time and effort devoted to training, long-term goals primarily self-centered, rarely evidences genuine concern for patients	Conscientiously pursues acquisition of knowledge and skills in medicine, evidences willingness to accept personal challenges of training and practice, evidences genuine concern for patient's welfare	Enthusiastically seeks out opportunities to increase knowledge and skills in medicine, evidences willingness to devote necessary time and effort to training and practice but also maintains healthy balance in lifestyle, active and compassionate patient advocate
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:			
	Needs Improvement	Acceptable	Strong
Teachability / Learnability	Requires frequent repetition of most basic information, fails to apply general principles to specific cases; resistant to correction, defensive to negative feedback, rarely asks questions, little or no participation in discussions	Retains new information well, can usually apply principles to specific cases, takes correction and negative feedback well; asks good questions and participates in discussions	Actively pursues knowledge and explores topics on own initiative, effectively applies principles to specific cases, seeks and responds to correction and feedback; questions are incisive and participates actively

							and appropriately in discussions
<input type="checkbox"/> Not applicable or observed	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/>
Comments:							

Overall Comments: _____

Signature: _____

Evaluation date: ____/____/____