

The Thoracic Surgery Milestone Project: Assessment Tools

A Joint Initiative of
The Accreditation Council for Graduate Medical Education
and
The American Board of Thoracic Surgery

Milestone evaluation is completed by the Clinical Competency Committee using resident assessments completed throughout resident education. These assessments are completed by faculty members, other care providers, and patients. The Thoracic Surgery Milestone Working Group altered exiting assessment tools to simplify evaluating the Milestones. These assessment tools are not required.

Table of Contents

Chart Audit of Patient Encounter	page 1
Presentation Evaluation	page 2
Observation of Patient Encounter	page 3
Quality Improvement Review	page 5
Residents as Educators	page 7
Mock Oral Interview	page 9
Patient Observation Form	page 10

Chart Audit of Patient Encounter

Resident: _____ Date: _____

Evaluator: _____

Topic: IHD Valve Great Vessel Congenital End-Stage Disease Esophagus Lung/Airway
Chest Wall/Mediastinum Critical Care Other _____

1. Medical History

0	1	2	3	4
Fails to document major elements of history		Documents major elements of history		Documents all relevant elements of history

2. Physical Exam

0	1	2	3	4
Fails to document major findings		Documents major findings		Documents major and subtle findings

3. Test Results

0	1	2	3	4
Documentation of major test results is missing or inaccurately documented		Major test results documented but not all relevant findings documented		All test results documented appropriately and all relevant findings documented

4. Plan of Care

0	1	2	3	4
Incomplete or irrelevant plan provided		Basic elements of an appropriate plan are documented		Complex plan with appropriate contingencies documented

5. Organization

0	1	2	3	4
Poorly organized Major elements missing Incomplete		Major elements organized properly but inefficient or grammatically incorrect		Well-organized documentation Efficient documentation

6. Timeliness

0	1	2	3	4
Late and required reminders to effect completion		Late but still completed without reminders		On time completion

7. Overall Level of Competence

No Knowledge	Beginner	Advanced Beginner	Intermediate	Competent
--------------	----------	-------------------	--------------	-----------

Suggestions for improvement:

Reviewed with Resident: Yes No

Date reviewed: _____ **Reviewer:** _____

Resident Signature: _____

Presentation Evaluation

Resident: _____ Date: _____

Presentation Title: _____ Evaluator: _____

Topic: IHD Valve Great Vessel Congenital End-Stage Disease Esophagus Lung/Airway
Chest Wall/Mediastinum Critical Care Other _____

1. Organization								
0 Disorganized	1	2 Partially organized No clear flow of topic	3	4 Concise, logical, integrated				
2. Objectives								
0 Not stated	1	2 Some, but not all objectives covered	3	4 Objectives completed and covered Relevant disclosures made				NA
3. Verbal Communication								
0 Ineffective	1	2 Monotonous tone Unclear jargon Flow is halting	3	4 Facile, engaging Excellent flow Effective				
4. Non-verbal Communication								
0 No eye contact Lacks confidence	1	2 Somewhat comfortable Some eye contact	3	4 Confident Good eye contact and body language				
5. AV Materials								
0 Visually unclear, illegible, ineffective	1	2 Mostly relevant and legible Distracts from content	3	4 Organized, concise, readable Effective Enhances presentation				
6. Content								
0 Not relevant Misleading	1	2 Some lack of relevance or accuracy Superficial	3	4 Relevant, accurate, up-to-date, evidence-based				
7. Audience Engagement								
0 Unengaged	1	2 Some participation, asks for questions	3	4 Elicits participation Able to expand presentation in response to questions				NA
8. Overall Effectiveness of Presentation								
No Knowledge	Novice	Advanced Beginner	Intermediate	Competent				

Suggestions for improvement:

Reviewed with Resident: Yes No

Date reviewed: _____ Reviewer: _____

OBSERVATION OF PATIENT ENCOUNTER IN CARDIOTHORACIC SURGERY

Resident Signature: _____

Resident: _____ Evaluator: _____ Date: _____

Diagnosis: _____ Setting: Ambulatory Inpatient Emergency Department Other _____

Milestone Topic: IHD Valve Great Vessel Congenital End-Stage Disease Esophagus Lung/Airway Chest

Wall/Mediastinum Critical Care Other _____

	None	1	Advanced Beginner	2	3	Competent	4	NO*
History	0	1	Advanced Beginner	2	3	Competent	4	
Obtains history in organized/focused way	Misses multiple elements of history		Notes majority of major elements of history			Accurate, thorough, complete history		
Attentive, good eye contact	Inattentive with infrequent eye contact		Intermittent eye contact			Attentive, with good eye contact		
Introduces self, addresses patient by name	Does not introduce self Does not address patient by name		Partial explanation of role Uses improper salutation			Fully explains role/ relationship to care team Respectfully addresses patient		
Responds appropriately to affect/non-verbal cues	Does not notice affect/non-verbal cues		Partially aware and responsive			Fully aware of affect/non-verbal cues and responds appropriately		
Physical Exam	0	1	Advanced Beginner	2	3	Competent	4	
Obtains physical in organized way	Disorganized, incomplete exam		Organized exam, includes most major elements			Thorough and complete exam		
Humanistic qualities/professionalism	0	1	Advanced Beginner	2	3	Competent	4	
Shows respect, compassion, empathy, confidentiality	Unkind, rough, or hurried encounter		Does not respect personal or cultural differences			Shows respect, compassion, empathy, confidentiality		
Works effectively with ancillary staff members	Rude to ancillary staff members		Does not actively engage ancillary staff members			Works effectively with ancillary staff members		
Decision making	0	1	Advanced Beginner	2	3	Competent	4	
Communicates possible diagnosis	Does not communicate with patient		Uses medical terminology patient does not understand			Demonstrates effective communication; discusses diagnosis, risks and benefits, and options		
Allows further questions/elicits patient preference	Avoids answering patient questions		Responds to patient questions			Actively elicits patient questions Communicates what to expect to patient		
Encounter is timely and succinct	Rushes encounter, inadequate time for questions		Encounter ends without completion of forms, consent, etc.			Encounter is timely, succinct, effective, complete		
Considers cost-effectiveness of testing and treatment	Does not select appropriate diagnostic tests or selects excessive tests		Selects some appropriate tests but requires guidance to prioritize appropriate testing			Practices in cost-conscious manner		
Record Keeping	0	1	Advanced Beginner	2	3	Competent	4	
Note is timely, concise, and complete	Note omits major elements of encounter/plan, etc.		Major elements are documented, but incomplete			Documentation is complete, accurate, timely		
Coding is accurate and supported by documentation	Limited understanding of importance of coding		Understands importance of coding Minor coding inaccuracies			Coding of routine diagnoses is accurate and supported by documentation		
Overall Clinical Competence	Beginner		Advanced Beginner		Intermediate		Competent	

*NO = Not Observed

Suggestions for improvement:

Reviewed with Resident: Yes No

Date reviewed: _____ Reviewer: _____

Resident Signature: _____

QUALITY IMPROVEMENT REVIEW (M&M) IN THORACIC SURGERY

RESIDENT NAME _____ YR IN PROGRAM _____ DATE _____ EVALUATOR _____

Complication(s)/Session Addressed: _____

Milestone Topic: IHD Valve Great Vessel Congenital End-Stage Disease Esophagus Lung/Airway
 Chest Wall/Mediastinum Critical Care Other _____

Medical Knowledge Understands root cause of the M&M; understands the management options of original patient issue and reasoning of resulting complication(s)	0 No understanding	1	2 Some understanding	3	4 Objectives covered	N/A
Patient Care Managed original patient issue and appropriately recognized/managed complication	0 Did not understand complication	1	2 Limited understanding of complication	3	4 Clearly understood complication Recognized opportunity for improvement	N/A
Practice-based Learning and Improvement Effectively reviewed the literature and scientific evidence relative to complication; suggests appropriate practice modifications to prevent future occurrences	0 Did no review	1	2 Missed key references and modifications	3	4 Presented key evidence and appropriate modifications	N/A
Interpersonal and Communication Skills Presented in a succinct and engaging manner with the appropriate AV enhancements; information was appropriate to the range of learners	0 Ineffective	1	2 Some lack in organization, engagement with audience	3	4 Organized, concise, engaging	N/A
Professionalism Disclosed information to appropriate parties/patient; appropriate medicolegal documentation; discussed complications with colleagues and family	0 Disclosed no information or failed to engage colleagues/family	1	2 Disclosed some information; poor communication; some family discussion	3	4 Fulfilled objectives	N/A
Systems-based Practice Demonstrated an understanding of resources available to provide optimal patient care; demonstrated cost-conscious, evidence-based	0 No demonstration	1	2 Demonstrated some understanding of resources	3	4 Fulfilled objectives	N/A

treatment strategies; report to QI committees to improve practices

and cost-related issues

Overall Level of Review: None Beginner Advanced Beginner Intermediate Competent

Suggestions for Improvement:

Reviewed with Resident: Yes No

Date Reviewed: _____ **Reviewer:** _____

Resident: _____

Residents as Educators in Thoracic Surgery

Instructions: Please use the scale to rate the resident on his or her teaching skills during the clinical rotation. The results of this evaluation will be shared with the resident, the residency program director, as well as the clerkship director. Your comments will remain anonymous.

Resident: _____ Clinical Rotation: _____ Date: _____

Extent of contact with resident during rotation: __ Minimal (<1 day) __ Moderate (<1 week) __ Extensive (>1 week)

1. Communication of learning goals; Ability of resident to provide a collaborative learning environment

0	1	2	3	4
No communication		The resident communicates information accurately at appropriate level for the learner.		The resident recognizes teachable moments and respectfully engages the learner. The resident teaches junior team members about presentation skills.

2. Knowledge about team member role and responsibilities; Leadership skills

0	1	2	3	4
No knowledge		The resident exhibits behaviors (e.g., respect, approachability, listens) that invite information sharing with health care team members.		The resident assumes overall leadership of a health care team responsible for his/her patients, while at the same time seeking and valuing input from members of the team.

3. Attitude towards teaching and learning

0	1	2	3	4
Undesirable behaviors, including acting impolitely and disrespectful, not respecting patient privacy, demonstrating lack of integrity, or failing to take responsibility for educational activities. Unaware of their role as a teacher.		The resident anticipates logistical issues regarding surgical care and communicates with the patient and hospital staff, engaging members of the team to solve problems.		The resident positively influences the learning environment by assertively modeling professional behaviors.

4. Identification of learning resources for educational sessions

0	1	2	3	4
The resident does not engage in directed learning activities or utilize available resources.		The resident independently reads the literature and uses CT surgery resources including library databases and on-line materials to answer questions.		The resident demonstrates use of system or process for keeping up with changes in the literature and initiates assignments for other learners.

5. Effective content delivery

0	1	2	3	4
The resident delivers inaccurate or inappropriate information.		The resident delivers accurate information ineffectively; does not embrace teaching opportunity.		The resident delivers content effectively and engages the learner.

6. Overall Level of Competence

No Knowledge	Novice	Advanced Beginner	Intermediate	Competent
--------------	--------	-------------------	--------------	-----------

Suggestions for improvement:

Reviewed with Resident: Yes No

Date reviewed: _____ Reviewer: _____

Resident Signature: _____

For Program Director Use: The 5 areas of review may aid in the evaluation of the four general competencies.

Q1 – Interpersonal and Communication Skills, Practice Based Learning and Improvement and Systems Based Practice

Q2 – Interpersonal and Communication Skills, Professionalism and Systems Based Practice

Q3 – Professionalism

Q4 – Practice Based Learning and Improvement

Q5 – Interpersonal and Communication Skills

Mock Oral Examination Assessment

Resident: _____ Date: _____

Evaluator: _____

Topic: IHD Valve Great Vessel Congenital End-Stage Disease Esophagus Lung/Airway
Chest Wall/Mediastinum Critical Care Other _____

1. Understand General Scenario

0 No understanding Generic questions Stalling	1	2 Some understanding Some appropriate questions for clarification Some hesitation	3	4 Full understanding Appropriate questions for clarification No hesitation
--	---	---	---	--

2. Anatomy/Pathophysiology

0 No basic knowledge	1	2 Integrates anatomy and pathophysiology	3	4 Understands complex variations	NA
-------------------------	---	--	---	-------------------------------------	----

3. Diagnostic Tests

0 Unclear, generic Unable to interpret Incorrect follow-up tests	1	2 Understands advantages and disadvantages Mostly appropriate interpretation Mostly appropriate follow-up	3	4 Interprets and integrates results Avoids unnecessary tests Appropriate follow-up
---	---	--	---	---

4. Formulate Differential Diagnosis

0 Unable to formulate Unclear path	1	2 Moderate list of differential diagnoses Somewhat logical path	3	4 Distinguishes complex clinical manifestations/complications Logical path
--	---	--	---	---

5. Diagnosis

0 No diagnosis	1	2 Mostly correct	3	4 Correct diagnosis
-------------------	---	---------------------	---	------------------------

6. Treatment Plan

0 No/inappropriate plan Does not seek assistance	1	2 Understands advantages and disadvantages of options Seeks qualified assistance	3	4 Appropriate plan or approach Accounts for complex patient
--	---	---	---	---

7. Management of Complications

0 Fails to recognize complication	1	2 Recognizes complication Incomplete understanding of treatment	3	4 Correctly identifies complication and appropriate treatment
--------------------------------------	---	--	---	---

8. Overall Level of Competence

No Knowledge	Beginner	Advanced Beginner	Intermediate	Competent
--------------	----------	-------------------	--------------	-----------

Suggestions for improvement:

Reviewed with Resident: Yes No

Date reviewed: _____ Reviewer: _____

Resident Signature: _____

Patient Evaluation Form

It is important to the Department of Cardiothoracic Surgery to know how our residents interact with patients. We would like them to be aware of what they do well and what they need to improve. Thank you!

Resident Name: _____ Date: _____

1. The resident introduced him/herself to me clearly explaining his/her role in my care.

Strongly disagree Disagree Neutral Agree Strongly agree

2. The resident behaved in a professional manner and was respectful of me.

Strongly disagree Disagree Neutral Agree Strongly agree

3. The resident explained my problem and care plan in terms I understood.

Strongly disagree Disagree Neutral Agree Strongly agree

4. The resident answered my questions clearly.

Strongly disagree Disagree Neutral Agree Strongly agree