

Participants	Define the roles of all participants of the encounter (e.g.: caregiver, mother, father, family, friend, trainees and level of training, experienced or novice allied health professionals, subspecialist physician, translator, other ...)
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Did the learner ...		Stages / Entrustability Scale [†]						Examples of Behaviors to Support Assessment and Corresponding Stages ^{††} (please note that examples include positive and negative behaviors)
		1	2	3	4	5		
Communication	... demonstrate verbal communication skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Red flag Interrupts, uses a forceful voice or dominates conversation, causing patient/parents distress 1-2 Uses convention: introduces self and explains role with medical team, uses layman's terminology 3-4 Aligns goals and maintains focus of the meeting with patient/parent wishes 4-5 Builds and maintains rapport with patient/parents with constant flow in interactions and exchanges with patients/parents
	... demonstrate non-verbal communication skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Red flag Inappropriately uses nonverbal cues such as closed or aggressive posture, abrupt exit/entrance, restlessness, or inappropriately frown/smile 1-2 Makes appropriate amount of eye contact, standing v/s sitting, leaning toward patient 2-3 Uses adjusted voice intonation, active listening, shows attentiveness 3-4-5 Responds to nonverbal cues (e.g., body language) from patient/parents and uses own nonverbal communication appropriately
	... demonstrate adaptability in the structure of the encounter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Red flag-1 Strictly adheres to checklist without flexibility 2-3 Integrates patient/parent expectations into agenda of encounter 4-5 Adopts dynamic and flexible flow of conversation, following verbal cues from family, allows for moments of silence
	... close loops during and at the end of the encounter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Red flag Does not answer patient's or parents' questions, does not formulate a plan for next steps 1-2 Leaves an opening for future discussion 3-4 Directly/clearly addresses patient's or parents' questions 3-4-5 Periodically summarizes and uses transitions to facilitate understanding of patient/parents 4-5 Closes encounter leaving family with realistic hope and expectations, but recognizing uncertainty
Civility and Respect	... demonstrate perspective-taking, cognitive empathy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Red flag Ignores or misses patient's concerns, queries. Disregards differences in values. 1-2/ 2-3 Identifies (1 - 2), articulates (2 - 3) patient's/parents' concerns 2-3-4 Solicits and explores patient's/parents' values, beliefs, perspectives and preferences 4-5 Addresses and validates patient's/parents' concerns, emotional features, values and norms
	... demonstrate compassion, affective empathy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Red flag Ignores patient's emotional reactions, or becomes inappropriately overcome with positive/negative emotion 1-2/ 3-4 Listens (1 - 2), display genuine emotional responses (3 - 4) 4-5 Validates and supports patient's/parents' feelings and maintains emotional composure
	... demonstrate sensitivity to perspective difference, empathy diversity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Red flag Stereotypes patient/parents based on culture, religion or gender 1-2/ 3-4 Identifies (1-2), addresses (3-4) differences in perspectives in between patient, parents, physician and other participants 4-5 In the context of patient's/parents' culture, religion or gender; interprets emotions, gestures and facial expressions appropriately
Clinical and Ethical Judgment and Decision-Making	... incorporate standards of practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Red flag Acts in conflict with professional ethics 1-2 Identifies the standards of practice 3-4-5 Acknowledges and appreciates the standards of practice in the context of the encounter
	... appreciate the complexity of the decision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Red flag Fails to incorporate patient's/parent's needs and perspectives 1-2-3 Demonstrates an understanding of the complexity, uncertainty, and ambiguity of the situation 2-3-4 Acknowledges that patient's/parents' choices might not follow guidelines and evidence based medicine 4-5 Weighs the evidence and conventions in clinical care with patient's/parents' needs
	... engage patient/parents in the decision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Red flag Deliberately influences patient or parents toward a decision without justification 1-2 Provides medical information that facilitate patient's/parents' participation 3-4-5 Balances information provided on the specific needs and preferences of the family 3-4 Incorporates patient's/parents' perspectives, values and religious beliefs into the decision-making process 4-5 Engages and invites silent participants to verbalize their perceptions when appropriate
	... manage disagreements/ ethical conflicts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Red flag Ignores or fails to address disagreements between participants (e.g. healthcare providers, patient, parents) 1-2/3-4 Recognizes ethical conflicts (1 - 2) and articulates the basis of the conflict (3 - 4) 5 While facilitating ethical resolution toward an agreement, incorporates the situation's specific characteristics and the patient's best interest, wishes and autonomy; stay open to the involvement of an interdisciplinary team
	... take steps toward an agreement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Red flag Fails to obtain agreement on next steps that will lead to a final decision 1-2/3-4 Summarizes the critical features of the encounter (1 -2) and obtains agreement on the next steps (3 -4) 4-5 Leaves encounter with mutual understanding and by identifying common ground

Please refer to the instructions provided in next page to complete the scale

Relevant situational factors that interfered with an ethically justified decision-making process	Not a concern	Moderate concern	Major concern
The physical environment of the encounter was not appropriately set-up prior to the meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Uncontrollable environment factors (e.g., noise, interruption, lighting, temperature)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time limitations that were attributable to the clinical context	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physician's physical or mental/cognitive fatigue (e.g.: post call, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: (e.g., patient's emotions, reactions) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments on other concerns not mentioned in the competency continuum above:			
Comments on positive examples during the encounter:			

OVERALL ASSESSMENT	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
At what stage of competency did the trainee perform?	<input type="checkbox"/>				
		No	Somewhat	Yes	
Did the trainee perform at their current stage of training?	<input type="checkbox"/>				
Did the trainee perform in a manner that exceeded their expected stage of training?	<input type="checkbox"/>				

† Entrustability Scale - Definition of stages of competency			
Stage 1	<i>Entry to residency</i>	<i>Requires full supervision (I had to do)</i>	<i>Function at the level of a pre-graduate trainee.</i>
Stage 2	<i>Transition to discipline</i>	<i>Requires constant direction (I had to talk them through)</i>	<i>This stage emphasizes the orientation and assessment of new trainees arriving from different medical schools and programs including outside of Canada. This stage corresponds to the junior resident status in their first 2-3 months of residency.</i>
Stage 3	<i>Foundation of discipline</i>	<i>Some independence but requires intermittent direction (I had to prompt them from time to time)</i>	<i>This stage covers broad-based competencies that every trainee must acquire before moving on to more advanced, discipline-specific competencies. This stage continues to correspond with junior resident status.</i>
Stage 4	<i>Core of discipline</i>	<i>Independence but still requires supervision just in case (I needed to be in the room just in case)</i>	<i>This stage covers the core competencies that make up the majority of a discipline. This stage corresponds to the early stage of senior resident status.</i>
Stage 5	<i>Transition to independent practice</i>	<i>Complete independence (I did not need to be there)</i>	<i>At this stage the trainee should demonstrate readiness to make the transition to autonomous practice. This stage of residency continues to correspond with the later stage of senior resident or junior attending role.</i>

Instructions to complete the scale provided in previous page

- 🚩 **Bolded items** flag professional concerns that could be independent of the stage of competency scored: check box when important concerns arose during the encounter that jeopardized the relationship between the patient/parents and the medical team
- † **Stages of competency evaluated on a scale 1 to 5** where stage "1" correspond to entry to residency, Stage 2 to transition to discipline, stage 3 to foundation of discipline, stage 4 to core of discipline, stage "5" correspond to transition to independent practice (see Table for more details)
- †† **In parenthesis**, a range of competency developmental stage a rater should observe is provided. The stage at which the behavior should be observed is **bolded**.