

## Continuity Clinic Evaluation Family Med PGY2-3 resident

This evaluation is EPA based and faculty will rate the resident based on continuity clinic, the Milestone mapping is provided. In our program we link this to help generate a report that the CCC will use to determine the final milestone

- 1) Provide preventive care that improves wellness, modifies risk factors for illness and injury, and detects illness in early, treatable stages.
  - a. Explanation PGY2-3: The resident demonstrates knowledge of the patient's history from chart review appropriate for the visit type (less knowledge for acute add-on, comprehensive for scheduled known patient). Beginning residents should articulate the history as it relates to the visit. They will demonstrate use of telemedicine appropriately for the expected visit type. Intermediate residents should consistently mark as reviewed the problem list, PMX, PSX, fam hx, Social hx. Advanced learners will remove outdated problem list diagnoses, complete HCC and any insurance verifications, update health maintenance. Aspirational residents will do all this at nearly every visit including add-ons.
  - b. Milestone Map: PC1, PC2, PC3, OPC, SPB1, PROF1, PROF2, ICS1, ICS3
  
- 2) Proactively managing preventive care and quality of care.
  - a. Explanation PGY2-3: They proactively review health maintenance. They address or have a plan to address gaps in care. They make recommendations with an understanding of what that insurance plan covers. They demonstrate the ability to interpret and apply guidelines. Advanced residents will understand and use coding to indicate if screening done or exempted. (Ex drop code for history hysterectomy for benign reasons)
  - b. Milestone Map: PC2, PC3, OPC1, SPB1, SPB2, PBLI1, PROF1, PROF2, ICS1, ICS3
  
- 3) Evaluate and manage undifferentiated symptoms and complex conditions and coordinates care and evaluate specialty consultation as the condition of the patient requires.
  - a. Explanation PGY2-3: Intermediate resident should create a plan to address. Balances lethal conditions with benign. Plan should take into account rarity of disease, and cost considerations. Plans should also change as the patient follows up to address less likely conditions. Intermediate residents will demonstrate timely response to inbasket results. Intermediate residents will refer to specialists for appropriate conditions in consult with preceptor and consider insurance requirements. Advanced learners will take into account cost of care with referrals and refer appropriate cases. Advanced learners will articulate a plan showing "if/then" logic that will cover multiple contingencies
  - b. Milestone Map: PC1, PC2, PC4, MK2, PBLI1
  
- 4) Diagnose and manage chronic medical conditions and multiple co-morbidities and uses data to optimize the care of individuals, families and populations.
  - a. Explanation PGY2-3: Demonstrates knowledge of the patient and their chronic conditions. Intermediate resident should create a plan to address. Intermediate residents will demonstrate precharting of the condition. Intermediate residents will demonstrate timely response to inbasket results. Advanced learners will have a complete plan even if the patient is in office for other reasons. Advanced learners are expected to have a contingency plan for how to handle

- decompensations. Advanced learners will also use quality tools to proactively seek out and manage patients that do not come to clinic.
- b. Milestone Map: PC2, PC3, PC4, OPC, MK1, MK2, SPB1, SPB2, PBLI1, ICS1, ICS3
- 5) Diagnoses and manage mental health conditions.
- a. Explanation PGY2-3: Understands how mental health applies to overall holistic care. Intermediate learners will understand tools used for depression screening and diagnosis. Intermediate learners will demonstrate familiarity and proper use of common medications. Advanced learners proactively ask about mental health and takes steps to address. Advanced learners will be able to respond and have a plan for emergency psychiatric care. Advanced learners will demonstrate knowledge of the local resources and know how to connect patients to them.
  - b. Milestone Map: PC1, PC2, PC3, PC4, OPC1, MK1, MK2, SPB2, PBLI1, ICS1, ICS3
- 6) Performs common procedures in the outpatient or inpatient setting
- a. Explanation PGY2-3: Intermediate learners will explain risk/benefit and obtain informed consent. Intermediate learners will perform common procedures supervised. Intermediate learners will document completely and log procedures. Advanced learners will seek opportunities to do procedures. Advanced learners will demonstrate an understanding of their limits and when to refer out. Advanced learners will undertake procedures and not overly refer.
  - b. Milestone Map: PC5, OPC1, OPC2, PBLI1, ICS1
- 7) OMT:
- a. Explanation PGY2-3: Demonstrates knowledge and application of OMT techniques. Proactively looks for opportunities to do OMT. Integrates OPP (not only manipulation but holistic care and self-healing) into plan. Demonstrates proper coding and billing. Intermediate learners will do this for most cases involving acute and chronic musculoskeletal problems. Advanced learners will apply OMT to problems in the extremities and systemic issues. Exemplary learners will advocate for OMT and teach the techniques to students. Exemplary learners will advocate for OMT through organizations, advocacy day, committee memberships or other ways.
  - b. Milestone Map: PC2, PC3, PC4, OPC1, OPC2, OMK1, OSPB, OPBLI, OPROF, OICS, ICS1
- 8) Develop trusting relationships and sustained partnerships with patients, families and communities. In the context of culture and health beliefs of patients and families, use the best science to set mutual health goals and provide services most likely to benefit health. Advocates for patients, families and communities to optimize health care equity and minimize health outcome disparities.
- a. Explanation PGY2-3: Resident shows compassion and considers patient social factors into the care plan. They will demonstrate use of translator services as appropriate. Intermediate learners will consistently integrate cultural beliefs when creating plans. They will demonstrate understanding while still providing high quality care. They will use the translator resources and document refusals. Advanced learners will demonstrate cultural understanding and utilize community resources. Advanced learners will contact family and outside partners to provide quality care within the context of privacy. Exemplary learners will

advocate for inequalities through organizations, advocacy day, committee memberships or other ways.

- b. Milestone Map: PC3, MK2, SPB2, SPB3, SBP4, PBLI2, PROF1, PROF2, ICS1, ICS3
- 9) Provides leadership within interprofessional health care teams.
- a. Explanation PGY2-3: Resident will show leadership and give direction to staff at office. Advanced learners will look to solve problems and create solutions. Advanced learners will take ownership of student education and balance patient and student needs. Exemplary learners will provide leadership and represent the residency program through organizations, advocacy day, committee memberships or other ways.
  - b. Milestone Map: SPB2, SPB3, SBP4, PBLI2, PROF1, PROF2, PROF3, ICS2, ICS3
- 10) Task fulfillment and following procedures and policy.
- a. Explanation PGY2-3: resident utilizes appropriate communication platform. They are on-time for events and courses. They return email in a timely manner and meet deadlines. They follow their hospitalized patient, perform home visits, and schedule continuity nursing home visits. Advanced learners do this all of the time without reminders. Advanced learners will show initiative to make up and correct any missed visits.
  - b. Milestone Map: MK2, SPB2, SPB3, PBLI2, PROF1, PROF2, PROF3, ICS2, ICS3