

## Quality Assurance Observation Checklist

This observation check-list is used as part of MedicalGPS' E4E Service Improvement Program. All personnel that engage patients, in person or via telephone, should have previously participated in the E4E live webinar training, or reviewed the E4E support staff training video, or otherwise have been trained in using the skills and techniques listed below as part of their interactions with patients.

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**Support Staff Name:** \_\_\_\_\_ **Date of Observation:** \_\_\_\_\_

**Observer's Name:** \_\_\_\_\_ **Score: # Yes's** \_\_\_\_\_ **out of # of Total Observed Items** \_\_\_\_\_

1. Maintains Eye Contact with Patient  
Yes \_\_\_\_\_ No \_\_\_\_\_ N/A \_\_\_\_\_ (telephone encounter)
  2. Addresses Patient by their Preferred Name  
Yes \_\_\_\_\_ No \_\_\_\_\_
  3. Asks Personal Details about the Patient, i.e., jobs, family, children, etc.  
Yes \_\_\_\_\_ No \_\_\_\_\_
  4. Uses Active Listening Techniques, i.e., smile, nod, ask confirming questions, etc.  
Yes \_\_\_\_\_ No \_\_\_\_\_
  5. Avoids the Use of Medical Jargon  
Yes \_\_\_\_\_ No \_\_\_\_\_
  6. Uses Good Body Language; i.e., uses open body posture, faces the patient, avoids crossing arms  
Yes \_\_\_\_\_ No \_\_\_\_\_
  7. Asks Open Ended Questions; i.e., "Tell me how I may help." Rather than, "Do you need any help?"  
Yes \_\_\_\_\_ No \_\_\_\_\_
  8. Shows Courtesy and Respect  
Yes \_\_\_\_\_ No \_\_\_\_\_
  9. Displays a Good, Positive Attitude Toward the Patient  
Yes \_\_\_\_\_ No \_\_\_\_\_
  10. Communicates Expected Wait Times and/or any Wait Time Delays to Patients  
Yes \_\_\_\_\_ No \_\_\_\_\_ N/A \_\_\_\_\_
  11. Uses Effective Telephone Etiquette; i.e., "Good morning" (or afternoon), Uses Practice Name, Uses Their Name, Smiles when Answering the Phone.  
Yes \_\_\_\_\_ No \_\_\_\_\_ N/A \_\_\_\_\_ (non-telephone encounter)
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