

# 10-Point Performance Observation Rubric

Administrator Name: \_\_\_\_\_ Observer Name: \_\_\_\_\_

Patient Persona Scenario: \_\_\_\_\_ Date: \_\_\_\_\_

**Instructions for Observer:** Watch your partner closely during the simulated patient intake. Award **1 point** for each behavior successfully demonstrated by the acting administrator. Do not award partial points. Use the designated space at the bottom to record specific, actionable feedback regarding missed clicks, skipped steps, or exact phrasing adjustments.

## Part 1: The 5-Step Protocol Execution (5 Points)

Score 1 point for each step completed accurately.

- 1. Acknowledge: Administrator stopped current tasks, made direct eye contact, and used a professional greeting.
- 2. Authenticate: Administrator verified the patient's identity using full name, date of birth, and a physical ID against the EHR profile.
- 3. Audit: Administrator actively audited demographic data (e.g., asked "What is your current address?" rather than "Is everything the same?") and verified insurance integrity.
- 4. Acquire: Administrator successfully identified and collected missing requirements (e.g., co-pays, signatures, or forms) as dictated by the scenario.
- 5. Advance: Administrator provided a clear clinical handoff and set accurate wait-time expectations based on the clinic's status.

## Part 2: EHR System Navigation (2 Points)

Score 1 point for each technical proficiency demonstrated.

- 6. Pathway Accuracy: Administrator navigated to the correct patient profile and data fields without excessive hesitation or incorrect clicking.
- 7. Data Integrity: Administrator accurately updated, flagged, and saved the demographic or insurance anomalies within the live EHR sandbox.

## Part 3: Communication Tone & De-escalation (3 Points)

Score 1 point for each interpersonal skill demonstrated.

- 8. Professional Tone: Administrator maintained a calm, measured, and professional vocal tone throughout the entire interaction.
- 9. Script Utilization: Administrator successfully applied the standardized de-escalation scripts when confronted with patient frustration or scenario friction.
- 10. De-escalation Success: Administrator successfully guided the patient through the intake process without escalating the conflict or becoming defensive.

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**Total Observation Score:** \_\_\_\_\_ / 10

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**Actionable Corrective Feedback**

Provide immediate, constructive guidance tied directly to the observable behaviors above. Avoid subjective criticism.

**Specific EHR Navigation/Technical Takeaways (e.g., missed clicks, data entry errors):**

- \_\_\_\_\_
- \_\_\_\_\_

**Specific Communication/Behavioral Takeaways (e.g., phrasing adjustments, tone feedback):**

- \_\_\_\_\_
- \_\_\_\_\_