**Virtual PI Pilot Data Collection Form**

**(With PROVISIONAL CODING SCHEMA)**

**Case #:**

**Date:**

**Attendance:**

**Group:**

**Facilitator:**

**Presenter:**

**Follow-up:** *(Previously-presented cases)*

*No Coding*

**The Story**

1. **Uncertainty: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
   * **Non-COVID**
     + **Category,** **CLINICAL:**

(underline all applicable)

* + - * **Diagnostic:**
        + **Subcategory: (Underline all applicable)**

“***What’s going on?” “What did I forget?” “How to work up….?” “How to assess patient’s current status?” “What is the differential?” “How to rule-out X?” “What is the etiology of X?” “How did I miss X?” What should I have done to prevent this missed, delayed, wrong dx?” Other***

* + - * **Management:** 
        + **Subcategory: (Underline all applicable)**

***“What should I do next?” “How should I treat/manage this patient?” (in context of no dx) “How should I treat/manage this patient?” (in context of known dx), “How should I have treated/managed this patient?” (in context of no dx), “How should I have treated/managed this patient?” (in context of known dx), Other***

* + - * **Relationship:**
        + **Subcategory: (Underline all applicable)**

***Communication issues, Socio-economic -cultural issues, Patient’s beliefs/values, Patient’s health-related behaviors, Patient’s physical, mental, cognitive functioning, Clinician biases (disclosed), Visit logistics, Missing pt information, Other***

* + - * **Prognostic:**
        + **Subcategory: (Underline all applicable)**

***Prognostic information available, Lack of key pt information, Lack of medical knowledge (PCP), Lack of medical knowledge (experts), Other***

* + - * **Ethical:** 
        + **Subcategory: (Underline all applicable)**

***Threats to Autonomy, justice, beneficence, non-maleficence, Other***

* + - * **PCP Role:** 
        + **Subcategory: (Underline all applicable)**

***Ambiguous, Conflicted, Disputed, Stressed, Unwanted, Other***

* + - **Category: COVID ERA CONTEXT RELATED** (underline all applicable)
      * **Working virtually** *in general***:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
        + **Sub- category:**

***Physician ambivalence/conceptual difficulties with telehealth platform for visit;***

***Patient ambivalence/conceptual difficulties with telehealth platform for visit, Other***

* + - * + **Patient’s context/environment interfering with visit:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Sub-Category:**

***Computer/Internet capabilities, Physical environment (e.g., living location, setting space, lighting), Family (e.g. children, pet interruptions), Access to information, Other***

* + - * + **Clinician’s context/environment interfering:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Sub-Category:**

***Computer/Internet, physical environment (e.g., living location, setting space, lighting), resource constraints, access to information, Other***

* **Asking questions that allow for making various kinds of assessments: \_\_\_\_\_\_\_\_\_\_**
* **Sub-Category (Assessments relating to)**

***Physical, Psychological, Cognitive, Sexual Functioning, Health habits/substance abuse, Family issues, Other***

* + - * + **Issues related to providing overall patient support: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Category: (Problems providing:)**

***Dx resources, Rx resources, Assurance, Education, Home/family, Advocacy, Other***

* + - * + **Patient’s context/environment interfering with getting health care going forward with PCP or others: \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Sub-Category:**

***Computer/Internet capabilities, physical environment (e.g., space, lighting), Family support, Need for COVID-related risk reduction behaviors, Fears of leaving house, Social isolation, Other***

* + **COVID**
    - **Category,** **CLINICAL:**

(underline all applicable)

* + - * **Diagnostic:**
        + **Subcategory: (Underline all applicable)**

“***What’s going on?” “What did I forget?” “How to work up….?” “How to assess patient’s current status?” “What is the differential?” “How to rule-out X?” “What is the etiology of X?” “How did I miss X?” What should I have done to prevent this missed, delayed, wrong dx?” Other***

* + - * **Management:** 
        + **Subcategory: (Underline all applicable)**

***“What should I do next?” “How should I treat/manage this patient?” (in context of no dx) “How should I treat/manage this patient?” (in context of known dx), “How should I have treated/managed this patient?” (in context of no dx), “How should I have treated/managed this patient?” (in context of known dx), Other***

* + - * **Relationship:**
        + **Subcategory: (Underline all applicable)**

***Communication issues, Socio-economic -cultural issues, Patient’s beliefs/values, Patient’s health-related behaviors, Patient’s physical, mental, cognitive functioning, Clinician biases (disclosed), Visit logistics, Missing pt information, Other***

* + - * **Prognostic:**
        + **Subcategory: (Underline all applicable)**

***Prognostic information available,Lack of key pt information, Lack of medical knowledge (PCP), Lack of medical knowledge (experts), Other***

* + - * **Ethical:** 
        + **Subcategory: (Underline all applicable)**

***Threats to Autonomy, justice, beneficence, non-maleficence, Other***

* + - * **PCP Role:** 
        + **Subcategory: (Underline all applicable)**

***Ambiguous, Conflicted, Disputed, Stressed, Unwanted, Other***

* + - **Category: COVID ERA CONTEXT RELATED** (underline all applicable)
      * **Working virtually** *in general***:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
        + **Sub- category:**

***Physician ambivalence/conceptual difficulties with telehealth platform for visit, Patient ambivalence/conceptual difficulties with telehealth platform for visit, Other***

* + - * + **Patient’s context/environment interfering with visit:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Sub-Category:**

***Computer/Internet capabilities, Physical environment (e.g., living location, setting space, lighting), Family (e.g. children, pet interruptions), Access to information, Other***

* + - * + **Clinician’s context/environment interfering:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Sub-Category:**

***Computer/Internet, physical environment (e.g., living location, setting space, lighting), resource constraints, access to information, Other***

* **Asking questions that allow for making various kinds of assessments: \_\_\_\_\_\_\_\_\_\_**
* **Sub-Category (Assessments relating to)**

***Physical, Psychological, Cognitive, Sexual Functioning, Health habits/substance abuse, Family issues, Other***

* + - * + **Issues related to providing overall patient support:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Category: (Problems providing:)**

***Dx resources, Rx resources, Assurance, Education, Home/family, Advocacy, Other***

* + - * + **Patient’s functioning, context/environment interfering with getting health care going forward with PCP or others: \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Sub-Category:**

***Physical/emotional/ cognitive functioning, Beliefs/values, Computer/Internet capabilities, physical environment (e.g., space, lighting), Family support, Other***

1. **Key Patient/Clinician/Relationship Information**

* **Demographics:**
* **Age: \_\_\_**
* **Gender: \_\_\_\_\_\_\_\_**
* **Psychosocial/cultural/SES: \_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Category:** (underline all applicable)

***Housing, Finances, Behavioral problems (e.g., substance abuse), Family issues general, Family issues health-related, Other***

* **Past medical history:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + - **Category:**

**(Name organ system if disease, list symptoms if not dx)**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Current Illness/Presenting sx:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(List Sx, no coding)
* **PE findings:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + - **Category:** (underline all applicable)

***Specific, General, Other***

* **Lab/imagining abnormalities: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
  + - **Category:** (underline all applicable)

***NON-COVID-related, COVID-related***

**Sub-Category*:***

***Lab, Imaging, Other***

* **Current meds:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**(List Meds, No Coding)
* **Other physicians (e.g., specialists)/Allied Health Professionals already seen for problem: \_\_\_\_\_\_\_\_\_\_\_\_**
  + - **Category:** (underline all applicable)

**Specialist, Other physician, Allied Health**

* **Clinician-patient relationship: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Time frame:** 
  + - **Category:** (underline all applicable)

***First visit, 2-4 visits, Less than year, Over one year***

* **Quality:** 
  + - **Category:** (underline all applicable)

***Positive, negative, unknown***

* **Presenter’s concerns re patient’s current status:** 
  + - **Category:** (underline all applicable) **Need for:**

***Dx resources, Rx resource; interpersonal support, education, Home/family support, Advocacy, Other***

* **What Presenter said she/he did during past visits :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + - **Category:** (underline all applicable)

***Order Dx tests (lab, imaging), Perform office procedure, Prescribe meds, Prescribe prevention measures, Prescribe self-care at home measures, Referral to other physician/specialist, Refer to Allied Health Professional, Provide education, Provide assurance, Provide safety-netting, Other***

* **Clinician’s ideas re possible uncertainty explanations:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (List,

NO CODING)

**INQUIRY**

1. **Presenter’s Starting Question:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * + - * **Category:** (underline all applicable)

***Essentially same as initial uncertainty question/statement,***

***Different than initial uncertainty question/statement***

(If different question, code new question on last page)

1. **Colleagues Gentle Queries (# = ) *Answers to these questions are incorporated into The Story and Synthesis)***
   * **#1**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
     + - * **Category:**
       - ***Content:* (*Focus of queries)***

**Sub-Category** (underline all applicable)

* ***Clinical: Symptoms, Current Diseases/conditions/syndromes, Past history, Diagnostic Process, Management in general, Prognosis, Patient functioning/ behavior, Clinician-patient relationship, Test/imaging ordering, referrals, Medications, Non-meds management, Relationship/communication challenges, Other***
* ***Non-clinical: Patient socio/cultural/economic factors, Patient beliefs/values, Health-related habits, Family context, Health care-related behavior, Other***
* ***PCP-focused as related to external environment: PCP Role, Office context, One Medical context, Larger health system context; Collaboration with colleagues****,* ***Collaboration with specialists/allied health professionals,******Visit logistics, Concerning Virtual visits, Other***
* ***PCP-focused as related to personal factors: Colleagues queries presenter’s Knowledge/skill base, Past experience, Cognitive/affective biases, PCP role****,* ***Other***
* ***Practice-Focused: Case reveals educational need, Case reveals health systems issues***
* ***Colleague-focused (Colleague talks about:) Their Knowledge, Experience, Feelings***
  + - * ***Nature/Style of Query:***

**Sub-Category** (underline all applicable)

* ***Non-Questions (i.e. statements): Lecturing, Direct advice, Indirect advice, Talking about self, Presenter validation, Presenter general support, Support re dx/rx approach, Support re relationship approach, Support re clinician self-care, Other***
* ***Questions: A clarifying question, not a gentle inquiry; A question asked directly (e.g., Could this patient be…..”), “How do you understand/make sense of….?” “What did you mean by…”. “What if…” “How do you see things going forward? Direct advice in form of question, Indirect advice in form of question, Other***
* **#2:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + - * + **Category:**
      * ***Content:* (*Focus of queries)***

**Sub-Category** (underline all applicable)

* ***Clinical: Symptoms, Current Diseases/conditions/syndromes, Past history, Diagnostic Process, Management in general, Prognosis, Patient functioning/ behavior, Clinician-patient relationship, Test/imaging ordering, referrals, Medications, Non-meds management, Relationship/communication challenges, Other***
* ***Non-clinical: Patient socio/cultural/economic factors, Patient beliefs/values, Health-related habits, Family context, Health care-related behavior, Other***
* ***PCP-focused as related to external environment: PCP Role, Office context, One Medical context, Larger health system context; Collaboration with colleagues****,* ***Collaboration with specialists/allied health professionals,******Visit logistics, Concerning Virtual visits, Other***
* ***PCP-focused as related to personal factors: Colleagues queries presenter’s Knowledge/skill base, Past experience, Cognitive/affective biases, PCP role****,* ***Other***
* ***Practice-Focused: Case reveals educational need, Case reveals health systems issues***
* ***Colleague-focused (Colleague talks about:) Their Knowledge, Experience, Feelings***
  + - * ***Nature/Style of Query:***

**Sub-Category** (underline all applicable)

* ***Non-Questions (i.e. statements): Lecturing, Direct advice, Indirect advice, Talking about self, Presenter Validation, Presenter general support, Support re dx/rx approach, Support re relationship approach, Support re clinician self-care, Other***
* ***Questions: A clarifying question, not a gentle inquiry; A question asked directly (e.g., Could this patient be…..”), “How do you understand/make sense of….?” “What did you mean by…”. “What if…” “How do you see things going forward? Direct advice in form of question, Indirect advice in form of question, Other***
  + **#3:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    - * + **Category:**
      * ***Content:* (*Focus of queries)***

**Sub-Category** (underline all applicable)

* ***Clinical: Symptoms, Current Diseases/conditions/syndromes, Past history, Diagnostic Process, Management in general, Prognosis, Patient functioning/ behavior, Clinician-patient relationship, Test/imaging ordering, referrals, Medications, Non-meds management, Relationship/communication challenges, Other***
* ***Non-clinical: Patient socio/cultural/economic factors, Patient beliefs/values, Health-related habits, Family context, Health care-related behavior, Other***
* ***PCP-focused as related to external environment: PCP Role, Office context, One Medical context, Larger health system context; Collaboration with colleagues****,* ***Collaboration with specialists/allied health professionals,******Visit logistics, Concerning Virtual visits, Other***
* ***PCP-focused as related to personal factors: Colleagues queries presenter’s Knowledge/skill base, Past experience, Cognitive/affective biases, PCP role****,* ***Other***
* ***Practice-Focused: Case reveals educational need, Case reveals health systems issues***
* ***Colleague-focused (Colleague talks about:) Their Knowledge, Experience, Feelings***
  + - * ***Nature/Style of Query:***

**Sub-Category** (underline all applicable)

* ***Non-Questions (i.e. statements): Lecturing, Direct advice, Indirect advice, Talking about self, Presenter Validation, Presenter general support, Support re dx/rx approach, Support re relationship approach, Support re clinician self-care, Other***
* ***Questions: A clarifying question, not a gentle inquiry; A question asked directly (e.g., Could this patient be…..”), “How do you understand/make sense of….?” “What did you mean by…”. “What if…” “How do you see things going forward? Direct advice in form of question, Indirect advice in form of question, Other***
  + **#4:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
    - * + **Category:**
      * ***Content:* (*Focus of queries)***

**Sub-Category** (underline all applicable)

* ***Clinical: Symptoms, Current Diseases/conditions/syndromes, Past history, Diagnostic Process, Management in general, Prognosis, Patient functioning/ behavior, Clinician-patient relationship, Test/imaging ordering, referrals, Medications, Non-meds management, Relationship/communication challenges, Other***
* ***Non-clinical: Patient socio/cultural/economic factors, Patient beliefs/values, Health-related habits, Family context, Health care-related behavior, Other***
* ***PCP-focused as related to external environment: PCP Role, Office context, One Medical context, Larger health system context; Collaboration with colleagues****,* ***Collaboration with specialists/allied health professionals,******Visit logistics, Concerning Virtual visits, Other***
* ***PCP-focused as related to personal factors: Colleagues queries presenter’s Knowledge/skill base, Past experience, Cognitive/affective biases, PCP role****,* ***Other***
* ***Practice-Focused: Case reveals educational need, Case reveals health systems issues***
* ***Colleague-focused (Colleague talks about:) Their Knowledge, Experience, Feelings***
  + - * ***Nature/Style of Query:***

**Sub-Category** (underline all applicable)

* ***Non-Questions (i.e. statements): Lecturing, Direct advice, Indirect advice, Talking about self, Presenter Validation, Presenter general support, Support re dx/rx approach, Support re relationship approach, Support re clinician self-care, Other***
* ***Questions: A clarifying question, not a gentle inquiry; A question asked directly (e.g., Could this patient be…..”), “How do you understand/make sense of….?” “What did you mean by…”. “What if…” “How do you see things going forward? Direct advice in form of question, Indirect advice in form of question, Other***

***(For more gentle inquiries, complete forms at end of document.)***

**SYNTHESIS**

1. **Presenter’s Initial Comments (In response to Gentle Inquiries): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
   * + - * **Category:**
       - ***Content:* (*Focus of comments)***

**Sub-Category** (underline all applicable)

* ***Clinical: Symptoms, Current Diseases/conditions/syndromes, Past history, Diagnostic Process, Management in general, Prognosis, Patient behavior, Clinician-patient relationship/communication challenges, Test/imaging ordering, referrals, Medications, Non-meds management, Other***
* ***Non-clinical: Patient socio/cultural/economic factors, Family context, Patient beliefs/values, Patient behavior, Other***
* ***PCP-focused as related to external environment: PCP Role, Office context, One Medical context, Larger health system context, Care coordination, Collaboration with colleagues****,* ***Collaboration with specialists/allied health professionals****,* ***Visit logistics, Concerning virtual visits,******Other***
* ***PCP-focused as related to:***
* ***PCP’s updated pt clinical appraisal(s) re: Diagnosis, Management, Prognosis, Relationship, Ethical concerns, Role, Other***
* ***PCP reflecting on: Knowledge/skill base, Past experience, Cognitive/affective biases, PCP role****,* ***Other***
* ***Practice-Focused: Case relevance to other clinicians, Case reveals educational need, Case reveals health systems issues***
  + - * ***Nature/Style of Comment:***

**Sub-Category** (underline all applicable)

* ***Statement/questions types: “I” statements/questions focusing on what PCP knows, did, should have done, could do (e.g., “What should I do about…”), Focusing on patient (e.g., “Why is this patient so….?”) Focusing on others involved in care or could be (e.g., “Where is the urologist in all of this?”), Focusing on internal systems of care, focusing on external systems of care***

1. **Discussion Points: (Code all applicable)**

* **Literature review needed: (Topic) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Category:** (underline all applicable

***Medical, Clinician-pt relationship/ communication, Psycho-social/SES/cultural/behavioral contexts, Ethics, Health systems, Other***

* **Experts to contact: (Expertise topics)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Category:** (underline all applicable)

***Medical, Allied health professionals, Ethics, Other***

* **Challenges highlighted:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Category:** (underline all applicable

***Medical (Dx, management, prognosis, prevention); Clinician-pt relationship/ communication/shared decision-making; Psycho-social/cultural/SES contexts; Patient beliefs/values; Health- related behaviors; Health care- seeking behavior; Ethics; Health systems; Resource availability; Care Coordination; Collaboration with specialists/allied health professionals, PCP role; Visit logistics, Concerning virtual visits, Other***

* **New frames Suggested (what if, imagine if): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Category:** (underline all applicable)

***Medical (Dx, management, prognosis, prevention); Clinician-pt relationship/ communication/shared decision-making; Psycho-social/cultural/SES contexts; Patient beliefs/values; Health- related behaviors; Health care- seeking behavior; Ethics; Health systems; Resource availability; Care Coordination; Collaboration with specialists/allied health professionals, PCP role; Visit logistics, Concerning Virtual visits, Other***

* **Biases discussed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Category** (underline all applicable)

***Availability, Representativeness, Confirmation, Premature closure, Hindsight, Base-rate neglect, Anchoring, Other***

* **Nature of presenter support provided:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Category:** (underline all applicable)

***Not provided, Positive, ?, Other***

* **Office/Practice Clinical Education Needs Highlighted**:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + ***Category:*** (underline all applicable)

***Specific medical topic, specific medical skill mastery, Clinician-patient relationship/communication, Clinical reasoning/problem solving,Other***

* **Office/Practice Systems Issues Highlighted:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
  + **Category:** (underline all applicable)

***EMR, Other automated clinical support systems, Front desk patient-provider interface, Patient flow, Coordination with One Medical larger organization, Coordination with other external health care resources/organization,Other***

1. **Presenter’s ‘to-do’ list: (if offered voluntarily)** :\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Category:** (underline all applicable)

***Medical (Dx, management, prognosis, prevention); Clinician-pt relationship/ communication/shared decision-making; Psycho-social/cultural/SES contexts; Patient beliefs/values; Health- related behaviors; Health care- seeking behavior; Ethics; Health systems; Resource availability; Care Coordination; Collaboration with specialists/allied health professionals, PCP role; Visit logistics, Concerning virtual visits, Other***

1. **Other Key Comments at Meeting’s End (from):**
   * **Presenter:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* **Category:** (underline all applicable)

***Medical (Dx, management, prognosis, prevention); Clinician-pt relationship/ communication/shared decision-making; Psycho-social/cultural/SES contexts; Patient beliefs/values; Health- related behaviors; Health care- seeking behavior; Ethics; Internal health resources, External Health resources; Care Coordination; Collaboration with specialists/allied health professionals, PCP role; Visit logistics, Concerning virtual visits, Colleague support/validation, Other***

* + **Group members:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
* **Category:** (underline all applicable)

***Medical (Dx, management, prognosis, prevention); Clinician-pt relationship/ communication/shared decision-making; Psycho-social/cultural/SES contexts; Patient beliefs/values; Health- related behaviors; Health care- seeking behavior; Ethics; Internal health resources, External Health resources Care Coordination; Collaboration with specialists/allied health professionals, PCP role; Colleague support/ validation, Educational case, Visit logistics, Concerning virtual visits, Other***

* + **Facilitator:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* **Category:** (underline all applicable)

***Medical (Dx, management, prognosis, prevention); Clinician-pt relationship/ communication/shared decision-making; Psycho-social/cultural/SES contexts; Patient beliefs/values; Health- related behaviors; Health care- seeking behavior; Ethics; Internal health resources, External Health resources; Care Coordination; Collaboration with specialists/allied health professionals, PCP role; Colleague support/ validation, Educational case, Visit logistics, Concerning virtual visits, Other***

**Additional Forms**

**For coding presenter’s starting question if different from original uncertainty question/statement: (code all applicable)**

* **Non-COVID**
* **COVID**

**Starting Question:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_-**

* + - * **Diagnostic:**
        + **Subcategory: (Underline all applicable)**

“***What’s going on?” “What did I forget?” “What is the differential?” “How to rule-out X?” “What is the etiology of X?” “What should I do next?” “How did I miss X?” What should I have done to prevent this missed, delayed, wrong dx?” Other***

* + - * **Management:** 
        + **Subcategory: (Underline all applicable)**

***“How should I treat/manage this patient?” (in context of no dx) “How should I treat/manage this patient?” (in context of known dx), “How should I have treated/managed this patient?” (in context of no dx), “How should I have treated/managed this patient?” (in context of known dx), Other***

* + - * **Relationship:**
        + **Subcategory: (Underline all applicable)**

***Communication issues, Socio-economic -cultural issues, Patient’s beliefs/values, Patient’s health-related behaviors, Patient’s physical, mental, cognitive functioning Clinician biases (disclosed), Visit logistics, Missing pt information, Other***

* + - * **Prognostic:**
        + **Subcategory: (Underline all applicable)**

***Prognostic information available, Lack of key pt hx information, Lack of medical knowledge (PCP), Lack of medical knowledge (experts), Other***

* + - * **Ethical:** 
        + **Subcategory: (Underline all applicable)**

***Threats to Autonomy, justice, beneficence, non-maleficence, Other***

* + - * **PCP Role:** 
        + **Subcategory: (Underline all applicable)**

***Ambiguous, Conflicted, Disputed, Stressed, Unwanted, Other***

**COVID ERA CONTEXT RELATED** (underline all applicable)

* + - * **Working virtually** *in general***:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
        + **Sub- category:**

***Physician ambivalence/conceptual difficulties with telehealth platform for visit, Patient ambivalence/conceptual difficulties with telehealth platform for visit, Other***

* + - * + **Patient’s context/environment interfering with visit:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Sub-Category:**

***Computer/Internet capabilities, Physical environment (e.g., living location, setting space, lighting), Family (e.g. children, pet interruptions), Access to information, Other***

* + - * + **Clinician’s context/environment interfering:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Sub-Category:**

***Computer/Internet, physical environment (e.g., living location, setting space, lighting), resource constraints, access to information, Other***

* **Asking questions that allow for making various kinds of assessments: \_\_\_\_\_\_\_\_\_\_**
* **Sub-Category (Assessments relating to)**

***Physical, Psychological, Cognitive, Sexual Functioning, Health habits/substance abuse, Family issues, Other***

* + - * + **Issues related to providing overall patient support:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Category: (Problems providing:)**

***Dx resources, Rx resources, Assurance, Education, Home/family, Advocacy, Other***

* + - * + **Patient’s functioning, context/environment interfering with getting health care going forward with PCP or others: \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Sub-Category:**

***Physical/emotional/ cognitive functioning, Beliefs/values, Computer/Internet capabilities, physical environment (e.g., space, lighting), Family support, Other***

**For coding more gentle inquiries:**

* + **#\_\_:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    - * + **Category:**
      * ***Content:* (*Focus of queries)***

**Sub-Category** (underline all applicable)

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