



Quick Tools

Educator & Clinician Reference | From Classroom to Caseload

Educator note: The handouts below mirror the templates used in the Readiness Seminars so learners can carry a single consistent set into clinic.

Quick Tool 1 — 3-Block Visit Map (Time-Pressure Workflow)

First 5 Minutes (Direction)

What are we doing today, and why? What must be reassessed for safety/progress?

Middle Block (Work)

What can the patient do independently? What needs coaching? Where can documentation happen?

Final Minutes (Anchor)

Quick reassess + plan + next visit focus + patient understanding check.

Quick Tool 2 — Real-Patient Reasoning (Messy Data Decision Framework)

- What they say (goals, concerns): _____
- What they do (tolerance, movement, behavior): _____
- What doesn't match: _____
- One safe next step today: _____
- What will be monitored closely: _____

Quick Tool 3 — Point-of-Service Documentation Plan

Where can documentation happen during the visit?

- Between activities
- During patient rest breaks
- During education recap
- After reassessment

What must be captured in the moment? (objective measures, response to intervention, key education)

What can be finished later? (only what truly requires reflection or system access)

One behavior to test next week: _____

Quick Tool 4 — SBAR Template (Student-to-Supervisor Communication)

S (Situation): I need help with... / I'm calling about...

B (Background): Key history/context (brief, relevant).

A (Assessment): What is being seen/observed and what the learner thinks is happening.

R (Recommendation/Request): I recommend... / Can you confirm... / What next step do you want?