**STANDARDIZED CHECKLIST FOR OTOSCOPY PERFORMANCE EVALUATION (SCOPE)**

Trainee Name/ID

Assessor Name

Examination Date

Patient Age

The instrument can be used divided into 4 sections. Each section has been evaluated independently and may be used independently for teaching and assessment purposes.

**GENERAL EXAM**

*This section is intended to assess the ability of the trainee to accurately inform the caregiver about the otoscopic portion of the physical exam. This discussion encourages good communication with the caregiver as well as addresses some of the challenges that frequently occur during otoscopy.*

Maximum points=12

DISCUSSION WITH CAREGIVER

1. ⁫Yes⁫No Discussed the need for otoscopic assessment

Did the trainee discuss with the caregiver that an ear exam would be necessary?

If YES, then score +1; If NO, then score 0

2. ⁫Yes ⁫No Described the possible need to remove cerumen to view ear

 Did the trainee discuss that it may be necessary to remove cerumen in order to visualize the TM?

 If YES, then score +1; If NO, then score 0

3. ⁫Yes ⁫No Described positioning and the possible need for secure holding method

 Did the trainee discuss that is may be necessary to securely hold the child during the examination?

 If YES, then score +1; If NO, then score 0

EQUIPMENT

*Correct choice of speculum size is important in order to facilitate optimal TM visualization, obtain a seal for pneumatic otoscopy, and avoid trauma to the EAC.*

4. ⁫Yes ⁫No Selected appropriate size ear speculum for proper seal and comfort to patient, given child’s age/size Age\_\_\_Size\_\_\_

Did the trainee select appropriate size speculum?

If YES, then score +1; If NO, then score 0

POSITIONING

*This section assesses the trainee’s ability to recognize and demonstrate appropriate positioning and restraint of the child. If the child’s head is NOT appropriately still during the exam, the trainee should recognize this and ask for assistance from the caregiver.*

5. ⁫Yes ⁫No Ensured appropriate position (including caregiver assisted) for patient based on age and/or developmental status of

 patient.

 Did the trainee ensure appropriate positioning?

 If YES, then score +1; If NO, then score 0

6. ⁫Yes ⁫No ⁫NA If needed, assured that child’s head was appropriately secured

If the trainee recognized the need to secure the head in order to perform the exam, then score +1

If trainee did NOT recognize the need to secure the head, then score -1

If the child did NOT require assistance to immobilize head during the exam, then check NA and score 0

7. ⁫Yes ⁫No ⁫NA If not able to perform step 6, asked for assistance from caregiver

If the trainee asked caregiver for assistance to secure head, then score +1

If trainee did NOT ask for assistance to secure the head, then score -1

If the child did NOT require assistance to immobilize head during the exam, then check NA and score 0

DISTRACTION TECHNIQUES

*Distraction techniques are used to engage the child, establish trust in the examiner, and divert the child’s attention. This section assesses the ability of the trainee to recognize the importance of using an age-appropriate distraction technique to facilitate the exam.*

8. ⁫Yes ⁫No Used distraction techniques appropriate for age/development stage.

Did the trainee use an appropriate distraction technique?

If YES, then score +1; If NO, then score 0

EXAM

*This section assesses the examination technique of the trainee, with an emphasis placed on skills that facilitate an atraumatic visualization of the TM. For video of optimal otoscopic exam, please refer to NEJM videos and ePROM*

9. ⁫Yes ⁫No Inserted otoscope with dominant hand.

If YES, then score +1; If NO, then score 0

10. ⁫Yes ⁫No Stabilized otoscope either by one-handed or two-handed method

If YES, then score +1; If NO, then score 0

11. ⁫Yes ⁫No Manipulated auricle to facilitate view of TM if necessary

If YES, then score +1; If NO, then score 0

12. ⁫Yes ⁫No Stabilized otoscope by bracing finger/dorsum of hand on infant/child’s face or head

If YES, then score +1; If NO, then score 0

**CERUMEN REMOVAL**

*This section assesses the trainee’s ability to remove cerumen that is obscuring the TM. If no cerumen is obscuring appropriate visualization of the TM, skip to PNEUMATIC OTOSCOPY section. If cerumen is obscuring the appropriate visualization of the tympanic membrane, then complete items 13 through 22 and score as indicated below. For demonstration of cerumen removal by direct visualization see NEJM video.*

Maximum Points=10

13. ⁫Yes ⁫No Identified need for cerumen removal

If YES, then score +1; If NO, then score 0

14. ⁫Yes ⁫No Asked appropriately for assistance

If YES, then score +1; If NO, then score 0

15. ⁫Yes ⁫No Secured and/or distracts child prior to removal attempt

If YES, then score +1; If NO, then score 0

16. ⁫Yes ⁫No Stabilized head

If YES, then score +2; If NO, then score 0

17. ⁫Yes ⁫No Used scope appropriately to aid in removal of cerumen

If YES, then score +1; If NO, then score 0

18. ⁫Yes ⁫No Used appropriate instrument for removal

If YES, then score +1; If NO, then score 0

19. ⁫Yes ⁫No Able to remove some cerumen but inadequate for appropriate TM visualization

 \_\_removed via direct visualization via open-headed otoscope

 \_\_removed via indirect visualization

If YES, then score +1; If NO, then score 0

20. ⁫Yes ⁫No Appropriately identified that cerumen removal was inadequate for TM visualization

If YES, then score +1; If NO, then score 0

21. ⁫Yes ⁫No Able to remove adequate cerumen for appropriate visualization of TM

\_\_removed via direct visualization

 \_\_removed via indirect visualization

If YES, then score +1; If NO, then score 0

**PNEUMATIC OTOSCOPY**

*This section assesses the trainee’s technique in pneumatic otoscopy. Pneumatic otoscopy provides the most accurate assessment of middle ear effusion. For video of proper pneumatic otoscopy, refer to NEJM videos and ePROM.*

Maximum Points=6

22. ⁫Yes ⁫No Appropriately attaches insufflators to otoscope

If YES, then score +1; If NO, then score 0

23. ⁫Yes ⁫No Uses appropriate speculum size: Age\_\_\_\_\_ Size\_\_\_\_

If YES, then score +1; If NO, then score 0

24. ⁫Yes ⁫No Checks for airtight seal

If YES, then score +2; If NO, then score 0

25. ⁫Yes ⁫No Use insufflator with patient appropriately

If YES, then score +2; If NO, then score 0

**DIAGNOSIS**

*This section compares the assessor’s confirmatory diagnosis with the trainee’s diagnosis.*

Trainee Diagnosis:

Assessor Diagnosis:

If the trainee’s diagnosis is CORRECT, then score +1; If diagnosis is INCORRECT, then score 0

**Score\_\_\_\_\_**