

Set the Stage	Yes	No	
1. Greet pt. appropriately			
2. Establish reason(s) for visit: _____			
3. Outline agenda for visit (e.g., “anything else”, issues, sequence)			
4. Make a personal connection during visit (e.g., go beyond medical issues at hand)			
5. Maintain pt’s privacy (e.g., close door)			
Elicit Information	n/a	Yes	No
6. Elicit pt’s view of health problem and/or progress			
7. Explore physical/physiological factors			
8. Explore psychosocial/emotional factors (e.g., living situation, family relations, stress)			
9. Discuss antecedent treatments (e.g., self-care, last visit, other medical care)			
10. Discuss how health problem affects pt’s life (e.g., quality-of-life)			
11. Discuss lifestyle issues/prevention strategies (e.g., health risks)			
12. Avoid directive/leading questions			
13. Give pt opportunity/time to talk (e.g., don’t interrupt)			
14. Listen. Give pt undivided attention (e.g., face pt, verbal acknowledgement, nv feedback)			
15. Check/clarify information (e.g., recap, ask “how much is that?”)			
Give Information	n/a	Yes	No
16. Explain rationale for diagnostic procedures (e.g., exam, tests)			
17. Teach pt about his/her own body & situation (e.g., provide feedback from exam/tests, explain anatomy/diagnosis)			
18. Encourage pt to ask questions			
19. Adapt to pt’s level of understanding (e.g., avoid/explain jargon)			
Understand the Patient’s Perspective	n/a	Yes	No
20. Acknowledge pt’s accomplishments/progress/challenges			
21. Acknowledge waiting time			
22. Express caring, concern, empathy			
23. Maintain a respectful tone			
End the Encounter	Yes	No	
24. Ask if there is anything else pt would like to discuss			
25. Review next steps with pt			

Comments:

Visit Date: / / **Review Date:** / / **Reviewer** _____

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