# ESSENTIAL ELEMENTS COMMUNICATION CHECKLIST

<table>
<thead>
<tr>
<th>Date: __________</th>
<th>Setting: _____________</th>
<th>Learner: __________________</th>
<th>Observer: ________________</th>
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## Build a Relationship
1. Greets and shows interest in patient as a person using patient/parent’s name  
2. Uses words that show respect and concern, and attends to patients physical comfort  
3. Uses tone, pace, eye contact and body language that show care and concern  
4. Engages everyone in the room

## Open the Discussion
5. Allows and facilitates patient to complete opening statement without interruption  
6. Checks and screens for further problems (e.g. “so that’s headaches and tiredness, what other problems have you noticed?” or “is there anything else you’d like to discuss today as well?”)  
7. Negotiates agenda taking both patient’s and physician’s needs into account

## Gather Information
8. Encourages patient to tell the story of the problem(s) from when it first started to the present in own words (clarifying the reason for presenting now)  
9. Clarifies details as necessary with more specific yes/no questions (avoids leading questions)  
10. Reflects, summarizes, and gives patient opportunity to correct or add information  
11. Transitions effectively to additional questions (i.e. HEADS, ROS)  
12. Responds explicitly to patient statements about ideas, feelings, and values  
13. Picks up verbal and non-verbal cues (body language, speech, facial expression, affect); checks out and acknowledges as appropriate.

## Share Information/Education
14. Assesses patient’s understanding of problem and desire for more information  
15. Assesses literacy level of patient: how well can they communicate, check for signs of low reading levels  
16. Explains using words that are easy for patient to understand; avoids jargon  
17. Relates explanations to patient’s illness framework: to previously elicited ideas, concerns, and expectations  
18. Negotiates a mutually acceptable treatment plan  
19. Asks if patient has any questions  
20. Clarifies any misunderstanding stated by patient: repeats instructions in articulate, clear and plain language  
21. Avoids giving advice, information, or reassurance prematurely  
22. Uses visual methods of clarifying information: demonstration, diagrams, models, written information and instructions

## Reach agreement (If new/changed plan)
23. Includes patient in choices and decisions, to the extent they desire  
24. Asks about patient’s ability to follow treatment plans  
25. Identifies additional resources as appropriate

## Provide Closure
26. Asks if the patient has questions or concerns  
27. Checks patient’s understanding of information given (or plans made): e.g. by asking patient to restate in own word; clarifies as necessary  
28. States specific diagnosis and what to expect/prognosis  
29. Clarifies follow-up or contact arrangements

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**Overall score for effective communication _____** (scale of 1-10)

**Comments:**

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