

Setting the Stage and Getting Started	
1	Begins by orienting patient to the end of interview (e.g., “We will be discussing assessment and plan”)
2	Asks if patient would like someone else present
3	Assesses what patient knows (patient understanding) before telling
Discussing the Clinical Issue/Diagnosis/Nature of Decision	
4	Explains diagnosis/prognosis, incorporating patient’s informational needs. Connects language of symptom description to diagnosis.
5	Assesses patient readiness to address topic, invoke change
Shared Decision Making	
6	Discusses patient role in decision-making (explicit discussion there is a decision to make)
7	Discusses clinical issue or nature of the decision
8	Discusses alternatives
9	Discusses pros and cons of alternatives
10	Discusses uncertainties with decision (complex decision only)
11	Assesses patient understanding
12	Explores patient preference/willingness to follow recommendation
Content of Plan	
13	Provides medically accurate and complete plan
14	Identifies SMART (specific, measurable, actionable, realistic, and time-based) goal acceptable to patient
15	Discusses medication name, number of pills per day, how to take, side effects, etc.
16	Presents plan in an organized manner
Wrapping Up	
17	Addresses patient’s barriers to recommendation (financial, social, cultural)
18	Summarizes decisions; provides written plans/instructions appropriate to patient’s level of health literacy
19	Discusses patient’s ability and confidence to follow agreed-upon plan
20	Uses teach back
21	Arranges follow-up
22	Indicates reasons for sooner follow-up

23	Supports patient before saying goodbye
Behaviors Throughout Encounter	
24	Demonstrates appropriate, open body language; sits down
25	Uses appropriate facial expression, tone of voice
26	Makes good eye contact
27	Speaks plainly/avoids jargon; adapts conversation to patient's level of understanding
28	Gives information in small chunks with frequent pauses; conversation is a back-and-forth, not a data dump; uses silence appropriately
29	Encourages patient to ask questions throughout discussion
30	Addresses and answers patient's questions; validates and/or acknowledges patient's concerns
31	Elicits/addresses patient's emotional verbal and non-verbal reactions; reflects what patient is saying, shows empathy, concern, and makes empathic comments
Use of Electronic Health Record	
32	Appropriately divides encounter into patient- and computer-focused stages
33	Shares screen with patient (invites patient to look at what's being written; reads what's being written; reviews data)
34	Moves head, eyes, body to patient and removes hands from keyboard/mouse to give patient undivided attention when needed
35	Uses computer for patient education support or provides other educational materials (e.g., online risk calculators, handouts)

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