

FRAMEWORK: INFORMATION TRANSFER¹

Step 1: Setting the Stage

1. Discuss patient's role in decision making
2. Good eye contact
3. Appropriate, open body language, sits down
4. Appropriate facial expression and tone of voice
5. Express caring, concern, empathy
6. Uses silence appropriately
7. Acknowledge patient's accomplishments/progress/challenges
8. Call patient by name

Step 2: Discuss clinical issue/nature of the decision

1. Explain diagnosis /clinical issue/nature of decision
2. Teaches patient about his/her own body/situation(feedback from exam/tests)
3. Explains management plan
4. Discuss the alternatives
5. Discuss the pros (benefits) and cons (risks) of the alternatives
6. Discuss the uncertainties associated with the decision
7. Avoids using jargon/explains medical terms used/Adapts conversation to patient's level of understanding
8. Explains reasons for recommendations/Explains rationale for diagnostic tests/procedures

Step 3: Identify barriers/Explore patient's preferences

1. Assess patient's understanding
2. Assess patient's willingness to follow recommendations/Explore patient preference
3. Assess patient's ability to follow recommendations
4. Solicits questions from patient/Encourages patient to ask questions
5. Uses visual and written reinforcement

Step 4: Outline next steps

1. Review next steps with patient
2. Arranges for follow up
3. Outlines reasons to re-contact/revisit
4. Shakes hands leaving

References: Lane JL, Gottlieb RP. *Pediatrics*.2000;105:973-7. Makoul GT. *SEGUE*. ©1993/1999
Braddock CH, Edwards KA, Hasenberg NM, Laidley TL, Levinson W. *JAMA* 1999;282:2313-2320

FRAMEWORK: STARTING A MEDICATION

1. Nature of the clinical problem (why patient needs to take the medication)	<input type="checkbox"/>
2. What the medication is	<input type="checkbox"/>
3. What the alternatives are and the risks and benefits	<input type="checkbox"/>
4. What the strength of the medication is	<input type="checkbox"/>
5. How many pills per day/how many times per day	<input type="checkbox"/>
6. Side effects of the medication and how common they are	<input type="checkbox"/>
7. What to do if develops side effects	<input type="checkbox"/>
8. How physician will follow-up with the patient to see if it is working and when that is	<input type="checkbox"/>
9. Elicit patient questions	<input type="checkbox"/>
10. Elicit potential barriers	<input type="checkbox"/>
11. Assess for patient buy-in	<input type="checkbox"/>

¹Compiled and developed by Dr. Jennifer Kogan, University of Pennsylvania.