## Building Partnerships for Safe Care: Observation Form and Checklist for Clinicians

| **Entering the room** | **Initial assessment** |
| --- | --- |
| * Read patient chart before entering room * Made eye contact with patient * Smiled, as appropriate * Introduced self by name and role * Introduced new people in the room, their role, and what they will do * Had conversations at the patient’s eye level | * Asked how patient prefers to be addressed |
| **Throughout encounter** |  |
| **Invitation behaviors:** Inviting patients and families to engage   * Welcomed patient and family as part of health care team * Used open-ended questions * Gave complete information about the patient’s condition * Used “teach back” * Found out how much the patient and family members wanted to know | **Supportive behaviors:**  Supporting patients and families as they engage   * Reacted positively when people engaged * Listened to and respected observations and values of patient and family * Helped patients and family members articulate their concerns when needed * Used plain language * Invited patient and family members to take notes * Identified others to answer questions, if needed |

Clinician Name:

| **Notes:** |
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Source: Agency for Healthcare Research and Quality (AHRQ), *Guide to Patient and Family Engagement*