## 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
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Clinician Name:

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