

INTERVIEWING THE APPLICANT/PATIENT CHECKLIST

Date:

Student's name:

Keywords: Yes = Most of the time, Parital= Sometimes, No = Almost never

N/A: Not applicable

A) Beginning the interview	No	Partial	Yes	N/A	Comments
1. Greeted the applicant/patient					
2. Introduced self					
3. Asked the applicant/patient to sit down					
4. Obtained the applicant/patient's name					
5. Called patient by the name during interview					
6. Asked the applicant/patient an open question					
7. Listened to the applicant/patient without interrupting him/her					
8. Concentrate on the interview					
B) Personal Manner	No	Partial	Yes	N/A	Comments

9.	Made eye contact					
10.	Used appropriate body language, tone of voice, facial expression					
11.	Smiled					
12.	Leaned in toward the applicant/patient					
13.	Avoided crossing arms					
14.	Avoided using cell phones					
15.	Responded to non-verbal cues from the applicant/patient					
C) Gathering Information		No	Partial	Yes	N/A	Comments
16.	Displayed awareness of information from medical record					
17.	Asked open ended questions to let the applicant/patient describe the problem					
18.	Assured confidentially					
19.	Avoided leading questions					

20.	Avoided medical jargon					
21.	Asked questions one at a time					
22.	Avoided rushing the applicant/patient					
23.	Took notes					
24.	Focused, as to not asking a question that was already answered					
25.	Summarized the history in the end, and ask if the applicant/patient has anything to add or correct					
D) Understanding the applicant/patient's perspective		No	Partial	Yes	N/A	Comments
26.	Encourage the applicant/patient to tell his/her story in a more complete fashion					
27.	Determine what effect the problem has on their day-to-day life and relationships					
28.	Respond supportively to the applicant/patient's expression of feelings and thoughts					
E) Explanation and planning		No	Partial	Yes	N/A	Comments

29. Provide explanations that the applicant/patient can remember and understand					
30. Check applicant/patient's understanding of information given					
31. Discuss the importance of the applicant/patient's involvement in the plans					
32. Encourage applicant/patient to be involved in implementing plans, and negotiate an acceptable plan					
33. Elicit the applicant/patient's reactions and concerns about plans and treatments					
34. Check with applicant/patient					
35. Obtain informed consent					
36. Explained management plan					
F) Ending the interview	No	Partial	Yes	N/A	Comments
37. Summarize and confirm the established plan of care					
38. Explain possible outcomes, what to do if plan is not working, when and how to seek help					

39. Check final agreement					
40. Contract with the applicant/patient about next steps for both applicant/patient and physician					
41. End the interview and politely, let him/her go out					