

Kalamazoo Essential Elements Communication Checklist (Adapted)¹

INSTRUCTIONS: Please observe the communication and clinical information gathering behaviors demonstrated in the encounter.

INSTRUCTIONS: For the next items, rate the performance in each category independently. The designation of Excellent is anchored as **an excellent performance in a practicing physician.**

How well does the learner do the following: (mark one rating for each item A-E)

	<u>Poor</u>	<u>Fair</u>	<u>Good</u>	<u>Very Good</u>	<u>Excellent</u>
A. Builds a Relationship (includes the following):	<input type="radio"/>				
<ul style="list-style-type: none">• Greets and shows interest in patient as a person• Uses words that show care and concern throughout the interview• Uses tone, pace, eye contact, and posture that show care and concern					

	<u>Poor</u>	<u>Fair</u>	<u>Good</u>	<u>Very Good</u>	<u>Excellent</u>
B. Opens the Discussion (includes the following):	<input type="radio"/>				
<ul style="list-style-type: none">• Allows patient to complete opening statement without interruption• Asks "Is there anything else?" to elicit full set of concerns• Explains and/or negotiates an agenda for the visit					

	<u>Poor</u>	<u>Fair</u>	<u>Good</u>	<u>Very Good</u>	<u>Excellent</u>
C. Gathers Information (includes the following):	<input type="radio"/>				
<ul style="list-style-type: none">• Begins with patient's story using open-ended questions (e.g. "tell me about...")• Clarifies details as necessary with more specific or "yes/no" questions• Summarizes and gives patient opportunity to correct or add information• Transitions effectively to additional questions					

	<u>Poor</u>	<u>Fair</u>	<u>Good</u>	<u>Very Good</u>	<u>Excellent</u>
D. Understands the Patient's Perspective (includes the following):	<input type="radio"/>				
<ul style="list-style-type: none">• Asks about life events, circumstances, other people that might affect health• Elicits patient's beliefs, concerns, and expectations about illness and treatment• Responds explicitly to patient's statements about ideas and feelings					

	<u>Poor</u>	<u>Fair</u>	<u>Good</u>	<u>Very Good</u>	<u>Excellent</u>
E. Provides Closure (includes the following)	<input type="radio"/>				
<ul style="list-style-type: none">• Asks if patient has questions, concerns or other issues• Acknowledges patient and closes interview					

(see other side)

¹ *Adapted from: Essential Elements: The Communication Checklist, copyright Bayer-Fetzer Group on Physician-Patient Communication in Medical Education, May 2001, and from the Bayer-Fetzer Conference on Physician-Patient Communication in Medical Education. Essential Elements of Communication in Medical Encounters: The Kalamazoo Consensus Statement. Academic Medicine 2001; 76:390-393.

Essential Elements Patient Interviewing Checklist

INSTRUCTIONS: For the next items, indicate whether and how well the student gathered information from the patient. The standard for complete & accurate is anchored **as expected of a practicing physician**, without regard for ability to interpret the information gathered

Which of the following items did the student cover?

A. Gathers Past History (includes the following):

- Details regarding past medical and surgical history, hospitalizations
- Medications, with dose and indications
- Drug Allergies, including Reactions

<u>No</u>	<u>Yes, attempted</u>	<u>Yes, complete & accurate</u>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

B. Gathers Family History (includes the following):

- Identifies members of family, i.e. parents, siblings and their medical conditions
- Asks specifically about diseases of known inheritance, e.g. heart disease, certain cancers

<u>No</u>	<u>Yes, attempted</u>	<u>Yes, complete & accurate</u>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

C. Gathers Social History (includes the following):

- Identifies who lives at home
- Asks about support systems
- Discovers what is important to the patient, i.e. how the patient spends most of his/her time, such as work, school, activities, hobbies
- Asks specifically about lifestyle behaviors that influence health, e.g. diet, exercise, alcohol consumption, tobacco and other substance use, sexuality

<u>No</u>	<u>Yes, attempted</u>	<u>Yes, complete & accurate</u>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>