<table>
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| **1. Hi (Entering)** | Knock before entering.  
Pause for three seconds before entering; take a deep breath.  
While pausing, say to self, “Just like me, this patient _______.” (e.g. “is scared” or “is a parent”). | While pausing, say to self, “Just like me, this patient _______.” (e.g. “is scared” or “is a parent”).  
Use a Faces Sheet to help identify team members and their roles (and post it in the patient’s room for easy reference). |
| **2. Familiarize (Identifying)** | Introduce yourself; have team members introduce themselves; and, share everyone’s roles.  
Ask the patient how he/she would like to be addressed.  
Have other people in the room identify themselves and how they are related to the patient. | Use a Faces Sheet to help identify team members and their roles (and post it in the patient’s room for easy reference). |
| **3. Interact (Connecting)** | Connect with the patient as a person.  
Invite the patient into the conversation by asking open-ended questions.  
Be at the patient’s eye-level, if possible.  
Ask about a personal item in the room, such as a picture of a family member or of a pet.  
Ask about upcoming plans for when the patient leaves hospital. | Be at the patient’s eye-level, if possible.  
Ask about a personal item in the room, such as a picture of a family member or of a pet.  
Ask about upcoming plans for when the patient leaves hospital. |
| **4. Voice (Discussing)** | Set an agenda with the patient.  
Engage the patient (and loved ones) to discuss the situation and to determine the plan of care.  
Acknowledge and affirm the patient’s efforts, experiences, suffering, and emotions.  
Use plain, simple language.  
Ask, “What’s your understanding of your situation?”  
Write on a whiteboard to share information, explain medical concepts, and list plans / goals.  
State, “You ask good questions.”  
State, “It sounds like you’ve been through a lot.” | Use plain, simple language.  
Ask, “What’s your understanding of your situation?”  
Write on a whiteboard to share information, explain medical concepts, and list plans / goals.  
State, “You ask good questions.”  
State, “It sounds like you’ve been through a lot.” |
| **5. Exit (Concluding)** | Ask the patient (and loved ones) to summarize the plan.  
Establish shared expectations for what will happen between now and the next encounter.  
Establish a way for the patient to record thoughts and concerns to share at the next encounter.  
Use Ask-Tell-Ask or Teach Back methods to assess patient’s (and loved ones’) understanding.  
Ask “Anything else?” or “What questions do you have?” before you leave the room.  
Invite the patient to record (on whiteboard / notebook / iPad) questions, thoughts, feelings, and concerns. | Use Ask-Tell-Ask or Teach Back methods to assess patient’s (and loved ones’) understanding.  
Ask “Anything else?” or “What questions do you have?” before you leave the room.  
Invite the patient to record (on whiteboard / notebook / iPad) questions, thoughts, feelings, and concerns. |