

## C.L.E.A.R. Model for Staff Members – *What to DO or SAY*

C	L	E	A	R
Connect	Listen	Explain	Ask	Re-connect
<ul style="list-style-type: none"> <li>Acknowledge patients immediately; introduce yourself</li> <li>▶ “Good morning, Mrs. White, I’m Marie, I’m a registered phlebotomist. I’ll be drawing your blood this afternoon.”</li> </ul>	<ul style="list-style-type: none"> <li>Maintain eye contact</li> <li>▶ <i>No words here...just a pleasant expression!</i></li> </ul>	<ul style="list-style-type: none"> <li>Describe what’s going to happen; explain as you go</li> <li>▶ “Thank you for your patience, Mrs. Saldana. The Radiology tech will be here in a few minutes.” “I’ll be attaching these leads to your chest and legs...they may feel a little cold for a second.”</li> </ul>	<ul style="list-style-type: none"> <li>Check for understanding</li> <li>▶ “Did you get all your questions answered?”</li> </ul>	<ul style="list-style-type: none"> <li>Check back frequently with waiting patients</li> <li>▶ “Dr. Smith asked me to let you know we haven’t forgotten you. He’ll be in as soon as he can.”</li> </ul>
<ul style="list-style-type: none"> <li>Establish eye contact; smile</li> <li>▶ <i>No words here – you know how to smile!</i></li> </ul>	<ul style="list-style-type: none"> <li>Use active listening techniques</li> <li>▶ “Uh-huh.” “I see...”</li> </ul>	<ul style="list-style-type: none"> <li>Use layperson’s language (not abbreviations or acronyms)</li> <li>▶ “Do you have your Explanation of Benefits?” (Don’t say EOB.) “Here’s some information on how we respect your privacy...”</li> </ul>	<ul style="list-style-type: none"> <li>Be sure the patient’s needs have been met</li> <li>▶ “...is there anything else I can help you with?” “Is there something I can do to make you more comfortable?”</li> </ul>	<ul style="list-style-type: none"> <li>Help patients find the next location</li> <li>▶ “Mr. Johnson, let me walk you to the pharmacy.”</li> </ul>
<ul style="list-style-type: none"> <li>Wear your name badge correctly</li> <li>▶ <i>No words here</i></li> </ul>	<ul style="list-style-type: none"> <li>Use active listening body language (smiling, head nodding)</li> <li>▶ <i>No words here</i></li> </ul>	<ul style="list-style-type: none"> <li>Let patients know when delays are expected</li> <li>▶ “Dr. Jones has one other patient ahead of you. She’ll be in as soon as she can. Is there anything I can do for you while you wait?”</li> </ul>	<ul style="list-style-type: none"> <li>Offer options, where appropriate</li> <li>▶ “If this is not convenient would you like to change your appointment or see the Nurse Practitioner?”</li> </ul>	<ul style="list-style-type: none"> <li>End with a friendly parting comment</li> <li>▶ “Take care.” “Thank you for understanding. We appreciate your...(fill in the blank).”</li> </ul>
<ul style="list-style-type: none"> <li>Use the patient’s name</li> <li>▶ “Hi Mrs. White, how’s my favorite patient today?” “Mrs. Saldana, please wait one second while I locate your record...”</li> </ul>	<ul style="list-style-type: none"> <li>Repeat information for accuracy</li> <li>▶ “Let’s see if I’ve got that right...” “So you’ve been having symptoms for two weeks, is that right?”</li> </ul>	<ul style="list-style-type: none"> <li>If there are tests or questionnaires involved before the patient sees the PCP explain what they are, how long they will take and what is needed from the patient.</li> </ul>	<ul style="list-style-type: none"> <li>Check for understanding by using teach-back method</li> <li>▶ “Can you please explain that back to me, just to be sure I gave you the correct information?”</li> </ul>	
<ul style="list-style-type: none"> <li>Use a friendly, helpful voice/tone; say “please” and “thank you”</li> <li>▶ “Could you sit on the exam table, please?” “I’m glad I could help.” “Mrs. Smith, thank you for holding, how may I help you?”</li> </ul>	<ul style="list-style-type: none"> <li>Respond with empathy statements</li> <li>▶ “Oh, I’m sorry to hear that.” “That must be uncomfortable for you.”</li> </ul>			