



Calling for Appointment:

- Apologizing for being on hold
- Thanking the person for calling
- Complimenting/affirming them on taking care of their (or their family member's) health
- Connecting talk (small talk)

The Parking Lot:

- Space to park
- Clear signage to clinic
- Free of garbage

Clinic Front Door:

- Welcome message
- Absence of command language/signs
- Absence of taped papers or torn signs or decals
- Handicap automated door

Reception & Checking in:

- Greeting (salutation) within 5 seconds of entering
- Eye contact within 2 seconds of entering
- Smiling with concurrent with eye contact
- Apology for wait to check in
- Connecting talk
- Purposeful compliments
- Greeting of children and other family members with person who is signing in
- Estimate of wait
- Advance apology for wait
- Offer of water
- Offer of books/coloring for children

Waiting Room:

- Absence of torn furniture, or other disrepair
- Positive magazines and books for adults, culturally matching population served; absence of torn or old (over 1 month) reading materials
- If screens are in the room: absence of news, any violence (even mild, cartoon violence)
- Small clusters of chairs, in groups of 6-9 (re: avoid 'lining the walls')
- Culturally responsive art on walls
- Absence of command signs or any taped papers on the walls

Calling a Person in for an Appointment:

- Ask receptions who patient is, walk directly to patient as opposed to calling from door whenever possible
- Greeting, eye contact, smile



- Greet children or other family members
- Offer to carry baby seat or other large bags/objects

Entry into Exam Area:

- Walk side by side with person, if possible; if not possible, turn head to converse with person when 'leading' them
- Greeting, eye contact, smile, by all other staff that are passed

In Exam Room with Healthcare Provider (not for BH):

- Express empathy: open ended questions, reflective listening, affirming strengths, acknowledging feelings and normalizing
- Connecting talk
- If child is there, offering of hand toys to parent

In Exam Room Waiting (not for BH):

- Absence of command signs, or taped/torn paper
- Absence of materials branded by other companies (pharma branded pamphlets, etc.)
- Culturally responsive art on walls
- Moderate temperature
- Pleasant distracting materials

In Exam Room with Healthcare Team Member:

- Greeting, eye contact, smile
- Apology for waiting
- Appreciation for coming
- Sit if patient is sitting
- Connecting talk
- Elicit concerns (open ended questions)
- Express empathy: Mirror facial expressions, square shoulders, absence of cross arms; normalizing, affirming and acknowledging emotional cues and stated feelings

Exit from Exam Area:

- Goodbye verbalized
- Goodwill sentiment; thank you for coming or hope you feel better
- All staff who are passed, say goodbye

Telehealth Service:

- Greeting, eye contact (if video), smile (narrate on telephone)
- Shape expectations
- Normalize new experience
- Affirm strengths, willingness to try something new
- Acknowledging feelings with new process

Billing (arrives later):

- Bill is at least 14-point font



- Bill is in the primary language of the recipient
- Bill information is clear- what charge is for, when it is due
- Bill has an appreciation sentence up front, for example "thank you for trusting us to be your health care provider"
- Bill has a clear sentence "if you have any questions or concerns about this bill: call, email, write"

