

## AGENDA SETTING BEHAVIORS OBSERVATION FORM

Instructions for the Observer: Please observe the first 2-5 minutes of the clinic visit, place a check next to each behavior you observe, make any comments that you have, give feedback to the resident and return the form to the clinic education director.  
NOTE: behaviors in bold face are required to meet minimal competency.

Resident Name \_\_\_\_\_

Date:    /    /

### Initiation of Visit

The doctor oriented the patient to the agenda setting process

### Solicitation of Concerns

The doctor identified patient concerns

The doctor invited the patient to voice additional concerns (e.g. “what else?...what else?...” until patient indicated no more concerns)

The doctor recognized and responded to clues for other agenda items.

The doctor summarized the patient’s concerns

### Prioritization and Negotiation

The doctor asked the patient which concerns were most important to them

The doctor let the patient know what he/she was most hoping to cover

The doctor acknowledged the patient’s concerns without agreeing to cover all the issues at today’s visit

The doctor proposed an appropriate agenda for the office visit and acknowledged unmet patient concerns

If there was disagreement about the agenda, the doctor respectfully tried to resolve the conflict.

If there were too many items to discuss at today’s visit, the doctor made arrangements to cover them at a subsequent visit.

The doctor restated the negotiated agenda.

### Respect

The doctor treated the patient with respect throughout

### Jargon

The doctor avoided jargon and used understandable lay language

Attestation of Competency: The resident has shown at least minimal competency in Agenda Setting            YES    NO

Comments:

Observer signature: \_\_\_\_\_