

# C.L.E.A.R. Model for Staff Members – What to Do or Say



| C   | L   | E  | A   | R   |
|---|---|--|---|---|
| Connect   | Listen  | Explain  | Ask   | Reconnect   |
| <p>Acknowledge patients immediately; introduce yourself.</p> <p><i>"Good morning, Mrs. White. I'm Marie and I'm a registered phlebotomist. I'll be drawing your blood this afternoon."</i></p>  | <p>Maintain eye contact.</p>  | <p>Describe what's going to happen; explain as you go.</p> <p><i>"Thank you for your patience, Mrs. Saldana. The radiology tech will be here in a few minutes."</i></p> <p><i>"I'll be attaching these leads to your chest and legs - they may feel a little cold for a second."</i></p> | <p>Check for understanding.</p> <p><i>"Did you get all your questions answered?"</i></p>  | <p>Check back frequently with waiting patients.</p> <p><i>"Dr. Smith asked me to let you know we haven't forgotten you. He'll be in as soon as he can."</i></p> |
| <p>Establish eye contact; smile.</p>  | <p>Use active listening techniques.</p> <p><i>"I understand..."</i></p> <p><i>"I see..."</i></p>  | <p>Use layperson's language (not abbreviations or acronyms).</p> <p><i>"Do you have your Explanation of Benefits?" Don't say "E.O.B."</i></p> <p><i>"Here's some information on how we respect your privacy..."</i></p>  | <p>Be sure patients' needs have been met.</p> <p><i>"Is there anything else I can help you with?"</i></p> <p><i>"Is there something I can do to make you more comfortable?"</i></p> | <p>Help patients find the next location.</p> <p><i>"Mr. Johnson, let me walk you to the pharmacy."</i></p>  |
| <p>Wear your name badge correctly.</p>  | <p>Use active listening body language (smiling, head nodding).</p>  | <p>Let patients know when delays are expected.</p> <p><i>"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?"</i></p>   | <p>Offer options where appropriate.</p> <p><i>"If this is not a good time to see the doctor, would you like to change your appointment or see the nurse practitioner?"</i></p>      | <p>End with a friendly parting comment.</p> <p><i>"Take care."</i></p> <p><i>"Thank you for understanding. We appreciate your patience."</i></p>                |
| <p>Say the patients' name.</p> <p><i>"Hi, Mrs. White. How's my favorite patient today?"</i></p> <p><i>"Mrs. Saldana, please wait one second while I locate your record."</i></p>  | <p>Repeat information for accuracy.</p> <p><i>"Let's see if I've got that right..."</i></p> <p><i>"So you've been having symptoms for two weeks - is that right?"</i></p> | <p>If there are tests or questionnaires that need to be completed before patients see the PCP, explain what they are, how long they will take and what is needed from patients.</p>  | <p>Check for understanding by using the teach-back method.</p> <p><i>"Just to be sure I have the correct information, would you mind explaining that back to me?"</i></p>           |   |
| <p>Use a friendly, helpful voice/tone; say "please" and "thank you".</p> <p><i>"Could you sit on the exam table, please?"</i></p> <p><i>"I'm glad I could help."</i></p> <p><i>"Mrs. Smith, thank you for holding. How may I help you?"</i></p> | <p>Respond with empathy statements.</p> <p><i>"Oh, I'm sorry to hear that."</i></p> <p><i>"That must be uncomfortable for you."</i></p>                                   |  |   |   |

# Take the H.E.A.T.



| H   | E  | A   | T  |
|---|--|---|--|
| Hear Them Out   | Emphasize  | Apologize   | Take Action  |
| <p>What to <b>do</b> or <b>say</b></p> <ul style="list-style-type: none"> <li>• Don't assume you understand why patients are upset. Give patients the opportunity to share their frustrations.</li> <li>• Demonstrate that you are actively listening to patients by asking probing questions, such as:<br/><i>"When/where did this happen?"</i><br/><i>"Who was involved?"</i></li> <li>• Demonstrate your understanding by paraphrasing back to patients.</li> <li>• Stay calm and be patient.</li> </ul> | <p>What to <b>do</b> or <b>say</b></p> <ul style="list-style-type: none"> <li>• Focus on patients' feelings. Respectfully acknowledge their feelings and opinions.</li> <li>• Use statements, such as:<br/><i>"I would be unhappy too if something like that happened to me."</i><br/><i>"That had to be a difficult experience to go through."</i></li> </ul> | <p>What to <b>do</b> or <b>say</b></p> <p><b><i>Simply saying "I am sorry" can go a long way.</i></b></p> <ul style="list-style-type: none"> <li>• Communicate with sincerity.</li> <li>• Be genuine and avoid apologizing too much; some patients may see this as patronizing.</li> <li>• Use statements, such as:<br/><i>"I am sorry you had that experience."</i><br/><i>"We appreciate you bringing this to our attention and giving us the opportunity to make it right."</i></li> </ul> | <p>What to <b>do</b> or <b>say</b></p> <ul style="list-style-type: none"> <li>• It is important not to get defensive or take things personally.</li> <li>• Focus on the issue and how you can help resolve the concern or need.</li> <li>• Take responsibility to follow up on or report the issue.</li> <li>• Ask the patients about their desired outcome and work within policy and/or regulation to address it.</li> </ul> <p><b><i>Follow through.</i></b> You may need to enlist the help of others to assist patients. If you or someone else will be following up with patients later, set appropriate expectations on when that will occur.</p> |