

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

Take the H.E.A.T.

H

Hear them out

WHAT TO DO or SAY

- Do not assume you understand why they are upset. Give them the opportunity to share their frustrations.
- Demonstrate that you are actively listening to them by asking probing questions such as:
 - ▶ “When/where did this happen?”
 - ▶ “Who was involved?”
- Demonstrate your understanding by paraphrasing back to them.
- Stay calm and patient.

E

Empathize

WHAT TO DO or SAY

- Focus on their feelings. Respectfully acknowledge their feelings and opinions.
- Use statements like:
 - ▶ “I would be (concerned/ unhappy, etc.) too if... (fill in the blank) happened to me.”
 - ▶ “That had to be a (difficult/ challenging, etc.) experience to (go through/have to deal with).”

A

Apologize

WHAT TO DO or SAY

- **Simply saying “I am sorry” can go a long way.**
- Communicate with sincerity.
- Be genuine and avoid overly apologizing as this can be perceived as patronizing.
- Use statements like:
 - ▶ “I am sorry you had that experience.”
 - ▶ “We appreciate you bringing this to our attention and giving us the opportunity to (assist you/make it right, etc.).”

T

Take action

WHAT TO DO or SAY

- It is important not to get defensive or take it personally.
- Focus on the issue and how you can help to resolve the concern or need.
- Take responsibility to follow-up or report the issue.
- Ask the patient about their desired outcome and work within policy and/or regulation to address it.

Follow through. You may need to enlist the help of others in the organization to assist the patient. If you or someone else will be following up with them later set appropriate expectations on when that will occur.