

Contextual Interview Checklist

Introduction

- Name, Title
- Integrated, holistic health focus
- Visit will be 20 minutes, ask some questions, get a picture of what is working and what is not
- Make a plan today, chart in medical record
- Follow up plans (1-2 visits, or more consistently)

Interview

- Love – Work - Play
 - Living situation
 - Relationship status
 - Family
 - Friends
 - Work/Income
 - Spiritual life
 - Fun
- Health Risk
 - Alcohol
 - Street drugs
 - Tobacco
 - Caffeine
 - Sex
 - Eating habits, supplements
 - Exercise
 - Sleep
- Time – Trigger – Trajectory (3 T's)
 - Onset? Recent change?
 - Triggers?
 - Things that make it better, worse?
 - How is this affecting love, work, play?

Summary statement

Intervention

- Psychoeducation/explanation
- Teach skill
- Set goals based on values
 - Specific, measurable, attainable, realistic, time limited

Wrap up

- Write on rx pad
- Return visit?

DURING THE VISIT, DID YOU...

- Control the tempo/pace?
- Use mirroring body language?
- Establish rapport?
 - Smile
 - Use their name
 - Make good eye contact
- Use open-ended questions?
- Make reflective statements (i.e., paraphrase back what you heard)?
- Make emotional reflective statements (insert emotion of what you heard)?
- Make clarifying statements?
- Use summary statements as transitions?
- Stay away from “why” questions; utilize what and how questions
- Stay organized while conducting interview?
- Stay within time parameters?

DEBRIEF

- What was helpful about today’s shadowing?
- What was challenging about today’s shadowing?
- One thing I learned from today’s shadowing?