

STEPS OF AGENDA-SETTING:

Rapport building

1. Invite list from patient

- *“The MA mentioned you are here for _____. Is that right?”*
- *“I understand you are here for _____. Is that correct?”*
- *“What is on your list of concerns today?”*
- *“Before we get started, let’s make a list of the things that you are hoping to address today.”*

Listen to list

- Do not commit. Do not prematurely dive into history gathering.

Repeat items

2. Ask, **“Is there something else?”**

- Repeat 1-3xs, or until patient states that’s all
- If patient continues to list, review list aloud and begin prioritizing

3. Add PCP’s agenda items, if there are any

4. Prioritize list collaboratively with patient & **Negotiate** if needed

- *“So you would like to address _____, and I would like to spend some time talking about _____. I think we have time for both. How about if we start with _____ and then talk about _____. Sound okay?”*
- *“There are actually quite a few different things that you are hoping to address today, and I have concern about _____ as well. We probably don’t have enough time to talk about all of these things today. Which concern would you say is the most important one to talk about today, with a plan to have you come back soon to address some of the others?”*

5. Summarize plan and confirm with patient

Begin.

AGENDA-SETTING ALGORITHM

Build rapport: Use the patient's name; greet all persons in the room; use a short, non-medical social interaction; smile; make eye contact; sit down.

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Transition to agenda setting: "I understand you are here for _____, but before we get into that, is there something else you would like to discuss today?"

NO

YES

Ask about refills and forms, and add your own agenda items:
Consider health maintenance issues and lab results.

Complete the agenda: Ask "Is there something else?" until the patient comes up with no new items.

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Are there too many items for the time available?

NO

YES

Ask the patient which problem he or she wants to start with today.

Prioritize problems and negotiate the agenda: Ask the patient which problem he or she wants to start with today.

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Explore the problem with an open-ended statement:
"So, tell me about _____."

Family Practice Management®

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