Boston University School of Medicine Patient Encounter Checklist: MIPEP
Created by Dr. Nan Harvey, Dr. Doug Hughes, Dr. Gail March, and Dr. Lorraine Stanfield

<table>
<thead>
<tr>
<th>Meet the Patient</th>
<th>Investigate</th>
<th>Physical Exam</th>
<th>End the Encounter</th>
<th>Present Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Patient and medical student]</td>
<td>![Medical student with mirror]</td>
<td>![Medical student with clipboard]</td>
<td>![Medical student with clipboard]</td>
<td>![Medical student writing]</td>
</tr>
</tbody>
</table>
| - Introduce yourself  
  • Give your name  
  • Shake hands  
- Explain your role as a medical student  
- Set the scene  
- Show respect by maintaining eye contact and listening attentively | - Ask the patient for the reason for the visit/admission (CC)  
- Utilize standard interview techniques  
- Collect Information  
  • History of Present Illness (HPI)  
  • Past Medical History (PMH)  
  • Medications  
  • Allergies  
  • Habits  
  • Family History (FH)  
  • Social History  
  • Review of Systems (ROS)  
- Explore the patient’s perspective | - Set up the exam  
- Attend to patient comfort  
- Explain what you are doing and why  
- Describe your findings as appropriate  
- Conclude the exam  
- Allow the patient to dress in private | - Summarize your historical and PE findings  
- Avoid jargon  
- Discuss the differential diagnosis where appropriate  
- Outline your plan for future testing/treatment  
- Instruct when appropriate  
- Ask the patient if there are any questions  
- Explain the next step  
- Thank the patient | - Orally present findings to the attending  
- Do the write up  
- Follow HIPAA guidelines  
- Attend to Ethical Issues |
Patient Encounter Checklist MIPEP

<table>
<thead>
<tr>
<th>Meet the Patient</th>
<th>1. Introduce Yourself</th>
<th>2. Set the Scene</th>
<th>3. Show Respect</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Give your name</td>
<td>Ensure privacy for patient</td>
<td>Maintain eye contact</td>
</tr>
<tr>
<td></td>
<td>Shake hands</td>
<td>• Pull curtains</td>
<td>• Listen attentively</td>
</tr>
<tr>
<td></td>
<td>Explain your role as a</td>
<td>• Close door</td>
<td>• Be responsive to the patient’s concerns</td>
</tr>
<tr>
<td></td>
<td>medical student</td>
<td>Reduce distractions (TV,</td>
<td>Make the patient comfortable</td>
</tr>
<tr>
<td></td>
<td></td>
<td>radio, cell phone)</td>
<td>Make yourself comfortable</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Make the patient</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>comfortable</td>
<td></td>
</tr>
</tbody>
</table>
## Patient Encounter Checklist MIPEP

|-------------|--------------------------|-------------------------|------------------------|----------------------------------|
| - Ask patient the reason for visit/admission  
- Avoid assumptions and interruptions  
- Develop agenda | - Start with open-ended questions  
- Clarify as needed  
- Use reflection  
- Use transitional statements  
- Encourage disclosure through non-verbal communication  
  - Silence  
  - Body language  
  - Head nod  
  - “uh huh”  
- Note non-verbal cues from patient  
- Name the emotion  
- Summarize periodically  
- Check for accuracy  
- Avoid jargon | - History of Present Illness  
  - Onset  
  - Duration  
  - Timing  
  - Setting  
  - Associated factors  
  - Alleviating factors  
  - Aggravating factors  
  - Pertinent positives  
  - Pertinent negatives | - What do you understand about the problem?  
- What are your concerns?  
- What effect has the condition had on your life?  
- What do you hope will be done about the problem?  
- What do you think is causing the problem? |
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>WASH HANDS</td>
<td>Explain what you are doing and why</td>
<td>Use proper draping techniques</td>
<td>Describe the next step</td>
</tr>
<tr>
<td></td>
<td>Ask patient to disrobe if necessary</td>
<td>Describe your findings to the patient as appropriate</td>
<td>Ask patient if comfortable</td>
<td>Allow patient to dress in private</td>
</tr>
<tr>
<td></td>
<td>Provide gown/ sheet</td>
<td></td>
<td>Warm hands and cold instruments</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Respect patient’s privacy</td>
<td></td>
<td>Avoid frequent position changes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Pull curtain</td>
<td></td>
<td>Provide hand for balance or assurance</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Close door</td>
<td></td>
<td>Consider doing pediatric HEENT exam and pelvic/rectal exam last</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Knock before entering</td>
<td></td>
<td>Offer tissues if necessary</td>
<td></td>
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<tr>
<td></td>
<td>Arrange chaperone as indicated</td>
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</tr>
</tbody>
</table>
## Patient Encounter Checklist MIPEP

### End the Encounter

1. Summarize Your Findings
   - Outline historical and PE findings
   - Discuss differential diagnosis as appropriate
   - Ask if the patient understands
   - Question patient about any missing information

2. Describe Your Plan
   - Explain your plan for future tests/treatment
   - Instruct and negotiate as necessary (smoking, substance abuse, nutrition)
   - Ask if there are any questions

3. Conclude
   - Tell the patient you will present your findings to the attending
   - Describe what the patient will do next
   - Propose next meeting if necessary
   - Thank patient
Patient Encounter Checklist MIPEP

<table>
<thead>
<tr>
<th>Present Findings</th>
<th>1. Report to Attending</th>
<th>2. Do Write-up</th>
<th>3. Ethics/ Privacy</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Opening Statement</td>
<td>Identify patient</td>
<td>Attend to HIPAA regulations</td>
</tr>
<tr>
<td></td>
<td>• Identifying data</td>
<td>• CC</td>
<td>• Do not discuss case in public areas</td>
</tr>
<tr>
<td></td>
<td>• Chief Complaint (CC)</td>
<td>• Source and Reliability</td>
<td>• Ethics: attend to issues such as</td>
</tr>
<tr>
<td></td>
<td>• Relevant history</td>
<td>• HPI, PMH, Meds, Allergies, Habits, FH, SH, ROS</td>
<td>• Informed consent</td>
</tr>
<tr>
<td></td>
<td>Source and Reliability</td>
<td>• PE findings</td>
<td>• Guardianship</td>
</tr>
<tr>
<td></td>
<td>HPI</td>
<td>• Laboratory and Imaging Data</td>
<td>• Advance Directives</td>
</tr>
<tr>
<td></td>
<td>Relevant information from PMH, Meds, Allergies, Habits, FH, SH, ROS</td>
<td>• Synthesis</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pertinent PE findings</td>
<td>• Problem List</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Laboratory and Imaging Data</td>
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</tr>
<tr>
<td></td>
<td>Synthesis</td>
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<td>Problem List</td>
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Attend to HIPAA regulations
Do not discuss case in public areas
Ethics: attend to issues such as
  - Informed consent
  - Guardianship
  - Advance Directives