The Calgary-Cambridge Guide to the Medical Interview

A Comprehensive Clinical Method

Part 1: Interviewing the Patient

Correspondence to:
Jonathan Silverman
School of Clinical Medicine
University of Cambridge
Box 116
Cambridge CB2 1SP
UK
js355@medschl.cam.ac.uk

Suzanne Kurtz
Faculties of Edu & Medicine
University of Calgary
EdTower 1102
Hills Road, Calgary
T2N 1N4
Canada
smkurtz@ucalgary.ca

References:


RECORDING THE CONTENT OF THE MEDICAL INTERVIEW

PATIENT'S PROBLEM LIST:
1. 
2. 
3. 
4. 

BIOMEDICAL PERSPECTIVE: (DISEASE)
sequence of events
symptom analysis
relevant systems review

PATIENT'S PERSPECTIVE: (ILLNESS)
ideas
concerns
expectations
effects on life
feelings

BACKGROUND INFORMATION - CONTEXT
past medical history
drug and allergy
family history
personal and social history
review of systems

PHYSICAL EXAMINATION

DIFFERENTIAL DIAGNOSIS AND/OR PROBLEM LIST
including both disease and illness issues

PLAN OF MANAGEMENT
investigations; treatment alternatives

EXPLANATION AND PLANNING
what the patient has been told; plan of action negotiated

CALGARY-CAMBRIDGE PROCESS GUIDE 1: INTERVIEWING THE PATIENT

INITIATING THE SESSION

Establish initial rapport
Greet patient and obtain patient's name
Introduce self, role and nature of interview; obtain consent
Demonstrate respect and interest, attend to patient's physical comfort

Identify the reason(s) for the consultation
Use appropriate opening question to identify problems/issues
Listen attentively to opening statement without interruption
Confirm list and screen for further problems
Negotiate agenda

GATHERING INFORMATION

Explore patient's problems
Encourage patient to tell the story from when first started
Use open to closed cone
Listen attentively
Facilitate patient's responses verbally and non-verbally
Pick up verbal and non-verbal cues
Clarify statements
Periodically summarise
Use concise, easily understood language
Establish dates

Understand the patient's perspective
Determine, acknowledge and appropriately explore:
- patient's ideas and concerns
- patient's expectations
- how each problem affects the patient's life

Encourage expression of the patient's feelings

PROVIDING STRUCTURE TO THE CONSULTATION

Make organisation overt
Summarise at the end of a specific line of inquiry
Signpost next section

Attend to flow
Structure interview in logical sequence
Attend to timing.

BUILDING THE RELATIONSHIP

Use appropriate non-verbal behaviour
Demonstrate appropriate non-verbal behaviour:
- eye contact, facial expression
- posture, position & movement
- vocal cues e.g. rate, volume, tone
If writing notes, ensure does not interfere with dialogue or rapport

Develop rapport
Accept patient's views and feelings non-judgementally
Use empathy, acknowledge feelings and predicament
Provide support
Deal sensitively with embarrassing and disturbing topics, pain

Involve the patient
Share thinking with patient
Explain rationale for questions
During physical examination, explain process/ask permission

CLOSING THE SESSION

Give any provisional information in clear well organised manner, avoid or explain jargon
Check patient understanding and acceptance of explanation and plans
Encourage patient to discuss any additional points and provide opportunity to do so
Summarise session briefly
Contract with patient re next steps