

Calgary-Cambridge Guide FDIU Telephone Interviews*

INITIATING THE SESSION

COMMENTS

Establishing Initial Rapport

1. GREETES client & determines how they would like to be addressed
2. INTRODUCES self, role and nature of discussion and process in context of the rotation. Giving the client some idea of your background may also be helpful
3. DEMONSTRATES RESPECT

Identifying the Reason(s) for the Consultation

4. IDENTIFIES PROBLEMS LIST or issues client or rDVM wishes to discuss, e.g., "What can we do for you? How can we help you?"
5. LISTENS attentively to the client's opening statement without interrupting or directing client's response
6. CONFIRMS LIST AND SCREENS for further problems (e.g., "So you have low birthweights and a high incidence of early calf deaths, anything else?")
7. NEGOTIATES AGENDA for this phone call and for the visit (it may help to share what information you want to get from the client before your visit and why it is important.) "What I'd like to do in this call is: 1) Clearly define WHAT the problem is 2) Get a timeline of WHEN it is/was occurring and 3) WHO has the problem WHERE and finish up by 4) getting some insight into HOW and WHY you think the problem may be occurring. Does that sound ok to you?"

GATHERING INFORMATION

COMMENTS

Exploration of Problem(s)

8. ENCOURAGES CLIENT TO TELL STORY of problem(s) from when first started to the present in his/her own words (clarifies reason for presenting now). Getting a timeline from the client may be one of the most useful things you do with this conversation!!
9. USES OPEN-ENDED AND CLOSED QUESTIONS, appropriately moving from open-ended to closed ("Can you describe the typical case?" Progressing to "How have the last few cases been different than the typical case?")
10. LISTENS ATTENTIVELY, allows client to complete statements without interruption, leaves space for client to think before answering,
11. FACILITATES CLIENT'S RESPONSES VERBALLY & NON-VERBALLY (e.g., uses encouragement, silence, repetition, paraphrasing)
12. CLARIFIES CLIENT'S STATEMENTS that are unclear or represent interpretation of observations (e.g. "Could you explain what you mean when you say....")
13. PERIODICALLY SUMMARIZES to verify understanding of client's comments, invites client to correct interpretation or provide further information
14. USES concise, EASILY UNDERSTOOD QUESTIONS AND COMMENTS, avoids or adequately explains jargon
- 14a. Asks a single question at a time!
15. **ESTABLISHES DATES AND SEQUENCE** of events

Additional Skills for Understanding the Client's Perspective

16. Actively DETERMINES AND APPROPRIATELY EXPLORES:
 - CLIENT'S IDEAS (i.e., beliefs re: cause: How/Why)
 - CLIENT'S CONCERNS (i.e., worries) regarding each problem
 - CLIENT'S EXPECTATIONS (i.e., goals, what client expects)
 - EFFECTS ON CLIENT and operation:

Additional comments:

PROVIDING STRUCTURE TO THE CONSULTATION

COMMENTS

<p><u>Making Organization Overt</u></p> <p>17. SUMMARIZES AT END OF A SPECIFIC LINE OF INQUIRY (e.g., review the timeline of the disease in the herd or flock) to confirm understanding & ensure no important data was missed; invites client to correct (“Let me make sure I have all the details correct . . .last year. . .)</p> <p>18. PROGRESSES from one section to another USING SIGNPOSTING, TRANSITIONAL STATEMENTS; includes rationale for next section (“I think I have a good handle on the timeline of when the diarrhea started in your herd. Could we switch gears and talk about your vaccination and deworming protocol?”)</p> <p><u>Attending to Flow</u></p> <p>19. STRUCTURES interview in LOGICAL SEQUENCE (Timeline (WHEN) and WHAT, WHO, WHERE first!)</p> <p>20. ATTENDS TO TIMING and keeping interview on task (“Thanks for that information Mr. Jones, I look forward to seeing your operation this week. Could we go back to what treatments you have tried so I have that information in mind while I am doing my research before we come out?”)</p>	
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BUILDING RELATIONSHIP - *Facilitating Client's Involvement*

COMMENTS

<p><u>Developing Rapport</u></p> <p>21. ACCEPTS LEGITIMACY OF CLIENT'S VIEWS and ideas about causes or implications; is not judgmental</p> <p>22. USES EMPATHY to communicate understanding and appreciation of client's situation; overtly ACKNOWLEDGES CLIENT'S VIEWS & IDEAS (“you are frustrated that you have tried so many antibiotics and nothing seems to work.”)</p> <p>23. PROVIDES SUPPORT: expresses concern, understanding, willingness to help; offers partnership (“Given what you have told me, it is completely reasonable that you are frustrated. You have tried a lot of the things that most of us would think of. We will get working on researching what other stones we may need to turn over and will work with you to see what we can do to get a handle on this situation.”)</p> <p><u>Involving The Client</u></p> <p>24. SHARES THINKING with client to encourage client's involvement (e.g., “What I am thinking now is.....”)</p> <p>25. EXPLAINS RATIONAL for questions that could appear to be non-sequiturs (“I know we have been talking about diarrhea, and this next set of questions may seem unrelated but they are going to help us understand some of the other factors that may be playing in to this process.”)</p> <p><u>Ensuring Appropriate Point of Closure from Phone call</u></p> <p>26. SUMMARIZES Discussion briefly and clarifies next steps (“We will do some research and develop our investigative plan, when is a good time next week for us to visit your operation?”)</p> <p>27. FINAL CHECK that client agrees and is comfortable with plan and asks if any correction, questions or other items to discuss</p>	
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Additional comments:

Student Name _____

Date _____

Assessing Effectiveness of Problem Clarification

Clarifying the problem(s) underlying the presenting complaint that led to the client reaching out to you is the overarching goal of the initial phone interview. To reach this goal you should strive to meet the objectives outline below.

- 1) Obtain the **Operation Description** as early as possible in the interview:
 - a. Primary purpose of the animals:
 - b. Breed(s):
 - c. Total # of Animals:
 - d. Primary housing type:
 - e. Primary feeding system:

Note: Primary housing and feeding descriptions should be able to fit in the small space allotted here. For example 100 acre irrigated pasture for a cow/calf operation covers both housing and feeding. Sand bedded free-stalls with exercise lots and TMR with Hi and Lo production groups for a dairy.

- 2) **Clarify the Problem(s)** fully during the course of the interview fully by getting the answers to these questions:
 - a. **WHAT** is/are the problem(s) identified? (If more than one problem, number them and use that number to identify WHO, WHERE, WHEN below.
 - i. Criteria that defines a case (**Case Definition**)
 - b. **WHO** has the problem? Think Risk Groups: Age, parity, sex, breed, color etc.
 - c. **WHERE** is/was the problem (location of lesions on the animal and/or on the premise (Pen, corral, pasture)
 - d. **WHEN** is/was the problem occurring? Construct a **Time Line**, with as precise dates as possible, and use it to organize the WHAT, WHO and WHERE of each problem.
 - i. **Index case**
 - ii. **Most recent case**
 - iii. **Changes over time** in WHAT/WHO/WHERE

- 3) Identify the **Client's Perspective** and experience with the problems
 - a. **HOW and WHY** the problem came about (**Risk Factors**). Preferably actively pursued only **after** the problem has been fully clarified.
 - b. **Impact** of the problem on the client and operation.
 - c. **Concerns** about the problem and the pending investigation
 - d. **Expectations**. What do they expect as outcomes of the investigation