**Exercise Title: Your Panel - Build the Relationship**

Facilitator Guide

* **Time: First activity –** 40-45 minutes (15 minute discussion, 15 minute report-out, 10 minute Take-Care model

**Second activity –** 30-45 minutes (compose Welcome to my Pracice document)

**Total time:** 75-90 min

* **Audience: R1s**
* **Objectives:** Strategize ways to connect with new patients in first clinic visit and get to know them over time; learn TAKE-CARE model as a tool; compose Welcome to my Practice letter and/or secure message
* **Procedures:**
1. Divide interns into groups, each with a faculty facilitator

Group 1 brainstorms ways (ie specific behaviors, words and phrases to use, room environment, etc) to establish rapport with new patients during the first clinic visit

Group 2 brainstorms ways to maintain a relationship from visit to visit (ie, write down one personal thing about the patient, telephone follow up after ED visits, new patient letters, etc)

Each group then reports out their lists to the group as a whole. Assign a scribe to take notes that can be emailed to the whole group later.

Then, discuss the TAKE-CARE model as a tool to connect with new patients that are being transitioned from a previous PCP

1. Compose a “welcome to my practice” document

Give each intern time to compose a Welcome to my Practice letter or email, that can be given or sent to patients following their first visits in clinic. A “Sample Letter” from the Journal of Family Practice (article referenced at the bottom) is included. Residencies can also provide their own templates or prompts as already exist in the practice.

Suggestions on what to include in a Welcome Letter:

* Your philosophy of care
* What patients can expect during a visit with you
* Useful information about the medical office where patients will be seeing you
* How to contact you and your team
* Personal information about you: where you come from, your education, why you chose medicine/family medicine, your special interests or areas of expertise within family medicine, hobbies/extracurricular interests, other languages you speak

## A SAMPLE WELCOME LETTER

Dear Mrs. Smith:

Welcome to my practice. I’m honored to be your physician, and I’m committed to providing you with the best care I can. My hope is that we form a partnership to keep you as healthy as possible, no matter what your current state of health. I will share my medical expertise with you, and I hope you’ll take responsibility for working toward the healthy lifestyle that is so important to your well-being. Few of us, myself included, have a completely healthy lifestyle, but each day we can take a step closer to a healthier life.

[Here](http://www.aafp.org/fpm/990500fm/23.html#13) are some important steps you can take toward better health:

 • Don’t smoke cigarettes or use other tobacco products.

 • Drink alcohol in moderation, if at all, and never drive when you’ve been drinking.

 • Eat a diet low in fat and high in vegetables and fruits.

 • Exercise at least three times a week.

 • Wear your seat belt whenever you’re in a car.

 • Learn about ways to deal with stress and tension.

 • Discover what spirituality means to you and practice it.

 • Maintain ties with your family, neighbors, co-workers or your church community.

It will give me great pleasure to work with you on these goals, either through my own expertise, through reading I might give you, or by referral to other health professionals.

We want everyone to be involved in our health maintenance program. Everyone who joins our practice should start by having a complete physical exam followed by periodic check-ups to test for a few specific diseases.

I look forward to working with you as your family doctor. Please contact me whenever you’d like to talk about anything you think may be affecting your health. It’s my hope that we can have a relationship where the lines of communication are open and communication goes both ways. I will listen to you at least as much as I talk. Let’s work together to help you live the satisfying life that you deserve.

Sincerely,

C. Carolyn Thiedke, MD

**Build the Relationship**

Evaluation

1) I have tools to build and maintain an effective relationship with patients on my panel

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
| 1 | 2 | 3 | 4 | 5 |

2) This activity enhanced my understanding

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
| 1 | 2 | 3 | 4 | 5 |

3) The information from this activity is relevant to my practice

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
| 1 | 2 | 3 | 4 | 5 |