

ACTIVE LISTENING TIPS

- Limit interruptions. Set your voice mail to pick up immediately. Establish a no-interruptions policy with colleagues when you are with patients and families. Use a chalkboard or other system on your door to reflect that you are currently with someone and when you will be available for other patients.
- Remember that your patient and his or her family are guests in your office. Treat them like you would a visitor in your home. Ask if they are comfortable with their chairs and with the temperature of the room. Like guests, patients and families tend to pick up our demeanor and activity level and follow the energy of their hosts. If you speak calmly and warmly, your visitors will ease into the discussion.
- Body language encourages engagement. Positioning yourself directly across from patients and families may feel intimidating especially if they are defensive or embarrassed about their financial circumstances. Sitting at a 35 to 45 degree angle with your knees towards the patients and family members indicates a non-confrontational attentiveness. If you are visiting with several family members, a rolling chair can help you shift to face the person speaking. Keep your arms relaxed and open.
- Verbally acknowledge that talking about financial matters can be difficult. Assure patients and families of your desire to help them take care of their treatment and financial needs.
- Have at least 2 to 3 minutes of discussion with patients and families before you begin to take notes. If you use a computer for note-taking, angle the keyboard and/or screen so your body is not turned away from your guests. Maintain eye contact as you type. It is helpful to allow patients and families to see your notes before the end of your visit. Transparency builds trust.
- Be prepared for a variety of emotional reactions. Some people are stoic and may seem distant. Be warm, but focus on the business at hand. Other people are more emotive and may cry or become visibly anxious. When this happens, stop the conversation. Verbally acknowledge that the situation is difficult. Ask if they need a minute and allow them to sit in silence until they are ready. Have tissues available.

FINANCIAL ADVOCACY NETWORK

- It's natural to match our breathing rate to the people around us. If someone is very anxious, try getting physically closer to them and pick up your breath rate for 30 to 60 seconds. When you slow back to a normal breathing pattern, they will often follow you.
- Clarify or summarize every 5 to 7 minutes. "We started talking about co-pays, but you seem to have concerns about your living expenses. Do you need some resources for utility assistance first, and perhaps we'll talk about co-pays at our next visit?" This 5 to 7 minute interval of time allows you to check in periodically to ensure that you have an accurate picture of patients' priorities without being so repetitive that they feel you are demeaning them.