

Role-Specific Teach-back and Open-ended Question Examples: Cardiology



Multidisciplinary members of a cardiology health team share examples for using teach-back and non-shaming open-ended questions. Here are examples selected to reflect the cardiac care continuum and inclusion of everyone on the cardiac healthcare services team. They demonstrate use of teach-back followed by open-ended questions that avoid yes/no responses and support patients and caregiver(s) in responding using their own words.

See also [Role-specific Teach-back - General](#) for additional roles, settings, and commonalities for teach-back practices across professions and settings.

Any Team Member

- Anytime you're about to ask a patient or caregiver, *"Does this make sense?"* instead say *"I want to be sure I explained that clearly, so could you explain that back to me using your own words or show me how you will do this at home?"* See [10 Elements for Using Teach-back Effectively - Detailed](#).
 - You can use teach- or show-back more than one time: *"What is the next step? And then what comes next?"*
 - For multiple topics, use Chunk and Check—teach and use teach-back with one subject before moving on to the next.
- Plan your teach-back in advance. See [Need-to-Know Need-to-Do](#).
- Build teach-back in over multiple sessions, especially for information related to self-management and safety since this content is likely complex.
- Remember to **always use words to show you are taking responsibility for being clear** before asking the person to explain back using their own words. See [Show You Are Taking Responsibility](#).

Registration/Scheduler

- Arrival
 - Ask about preferred language and describe your interpreter policy to ensure understanding for both the health team and patient and caregiver(s).
- Departure:
 - Ask when and how the patient or family member will schedule a test that has been ordered.
 - o When and where will you pick up and return the Holter monitor?
 - Review specific instructions for tests and referrals.
 - o Ask them to go over—in their own words—preparation steps or dietary or medication adjustments before their appointment.
- On the phone:
 - Ask when their appointment to discuss their results is scheduled (an open-ended question), not just whether it has been set up (a yes/no question).
 - Ask about needs for arrival, parking, or finding the visit location.

Physician/Advanced Practitioner

- After showing you are taking responsibility for being clear, ask the patient or family member to explain in their own words:
 - What they know about the diagnosis.
 - What signs and symptoms they need to watch for after going home, e.g., with a pacemaker.
 - Where they can go or who they can call if they have questions or concerns after hospital discharge.
- Use teach-back to ask what they think of the treatment options you discussed.
 - To best meet your needs, what do you see as the advantages and risks of each of the choices we went over?

Nurse

After showing you are taking responsibility for being clear, ask the patient or family member to use their own words to respond. Examples:

- Could you please show me how you will do your pacemaker wound dressing change?
- Can you please show me how you will take your blood pressure at home?
 - How often will you plan to measure your blood pressure?
 - What symptoms will cause you to call the doctor?

Ask open-ended questions:

- What, in the instructions, do you think you will find hard to do or doesn't feel right to you?
- What other information might be helpful as you get ready to go home?
- What cardiac rehabilitation programs interest you, and how can we support you to be able to participate? We can set up a visit with a social worker to explain in more detail.

Dietitian

- After reviewing a food plan, tell the person you want to be sure you did a good job going over everything, then ask:
 - Can you please give some examples of foods you enjoy that fit well with the meal guidelines we discussed?
 - How will you plan for meals when you go out, to be sure you eat the heart healthy foods we've gone over together?
 - Could you please give some examples of specific foods you will look for to meet your needs (e.g., foods with higher or lower levels of potassium)?

Pharmacy/Pharmacist Technician

After describing your interest in helping the patient use their medicines safely, ask:

- Who will you call with questions about your medicines?
- How will the changes in your medicines affect your routines? What can you do to remember these changes while you get used to your new routine?
- Please walk me through your typical day and describe when and where you will take your medicines.
- How do you plan to manage your medicines so you don't forget to take them? What will you do if you miss a dose?
- How will you get your refills and when will you order them?

Use a [Brown Bag Medicine Review](#) and ask them to go through each medicine and say what it is for and when they will take it during the day. See [Teach-back with Medicines](#).

Social Worker

Describe your goal to help the patient learn about services they need or want. Then use clarifying questions as a form of teach-back.

- After discussing community program choices, ask:
 - Which community program will you call this week?
 - What is the next step to enroll in this service/program? What information will you need to have to sign up?
- After discussing financial issues and options, ask:
 - What is your insurance coverage for your medicines?
 - What are the next steps for applying for the supplemental assistance program?

Physical Therapy/Physiotherapy

After guiding the patient to learn an activity or exercise and having them demonstrate how to do it, ask:

- What are your goals for doing your exercises and for other physical activity between your therapy appointments?
- How will you do your exercises at home (e.g., alone or with supervision; enough space)?
- Use open-ended questions to ask what concerns they have about:
 - Restrictions (e.g., weight-bearing limitations, lifting restrictions).
 - Activities or movements to avoid.
- Suggest they bring questions to their next visit. Examples:
 - Questions that arose about techniques for doing their exercises at home.
 - What is hard about doing them.

Occupational Therapy

After reviewing activities or exercises, tell the person you want to be sure you did a good job going over everything, then ask:

- Where will you have reminders for _____ that you won't miss?
- Please show me how you will do the relaxation technique we went over together.
- During the encounter, help them set a reminder on their phone or other device to help remember things like when or how often to practice.

Mobility/Personal Care Assistants/Physical Therapy Assistants

After reviewing the mobility plan and having the person demonstrate the activity or transfer to/from the wheelchair, ask:

- What are your goals for your exercises and how do you plan to achieve them with my help?
- What are some things you can do to avoid falls?

Speech/Language Therapy

After guiding the patient to learn an exercise and having them demonstrate how to do it, ask:

- What techniques or strategies that we talked about today will you work on between sessions/appointments for:
 - Word-finding or voice improvement?
 - Remembering to do exercises and how to do them?
- Can you please tell me what food/liquid textures we went over and what are 1-2 safe swallowing strategies?
- Ask “Why is it important to use safe swallowing strategies?”

Some of this content was developed by and adapted with permission from University Health Network, Patient Education and Engagement Program, Toronto, Canada.