OSCE checklist for explaining a procedure to a patient

An OSCE checklist for explaining a procedure to a patient covers introductions, finding out what they know, explaining in plain words in small chunks, covering what they will feel, risks and aftercare, and checking understanding.

OSCE checklist for explaining a procedure to a patient: steps to practise

1. Clean your hands, introduce yourself and confirm the patient's identity: full name and date of birth, checked against the wristband for inpatients.
2. Ensure privacy, ask whether they want someone with them and arrange a professional interpreter if needed.
3. Check what the patient already knows and what worries them.
4. Explain in plain words what the procedure is, why it is needed and what it involves, in short chunks, checking after each one.
5. Explain how long it takes, where it happens and who will be there, and any preparation such as fasting or changes to medicines, as the team advises.
6. Explain what the patient will feel, including pain, and how it will be managed.
7. Explain the common risks and the serious risks in a balanced way, and the alternatives, including doing nothing.
8. Explain what happens afterwards, including recovery, aftercare and the warning signs that mean they should seek help urgently.
9. Check understanding by asking the patient to explain back what they heard.
10. Invite questions, and respond to emotions with empathy.
11. Make clear the decision is theirs, that they may stop or change their mind, and how consent will be taken.
12. Summarise, offer written information and document the discussion.

What candidates commonly forget

- Using jargon
- Giving all information at once
- Not asking what the patient already knows
- Not mentioning preparation, pain or recovery
- Not giving warning signs to look out for afterwards
- Not checking understanding

Local policy comes first

This is our own practice checklist. Your college, hospital or country may do some steps differently. Where local policy and this list disagree, follow local policy.

Practise the hands-on steps with a classmate or in a skills lab, because an AI patient cannot watch your technique. You can practise the talking part with an AI patient, and try one station free with no sign-up. Next, try Consent for keyhole gallbladder surgery. Back to the OSCE stations for medical finals page: OSCE stations for medical finals, or see the full OSCE checklist list.

Common questions

What is the OSCE checklist for explaining a procedure?

Confirm identity, find out what the patient knows, explain in plain chunks, cover preparation, what they will feel, risks, alternatives, aftercare and warning signs, check understanding, invite questions, summarise and document.

How do I avoid jargon?

Use everyday words, and explain any medical term you must use.

What if the patient is anxious?

Acknowledge the worry, slow down and ask what worries them most.

Sources

- GMC: decision making and consent
- GMC: good medical practice

Checked 2026-11-13. Fees and rules change, so confirm them with the regulator before you book.