

# Contraceptive Counseling and Education Checklist

Counselor Name: \_\_\_\_\_ Date: \_\_\_\_\_

Observer Name: \_\_\_\_\_

**Purpose:** Use this checklist to note and provide feedback to a contraceptive counselor after observing their counseling session. You can also use this checklist to self-assess your own counseling and education skills.

**How to Use:** When observing a counseling session, notice how the counselor performs the bulleted skills or practices. Mark the level of competence you perceive (1 for needs improvement, 2 for satisfactory, or 3 for excellent). If an item is not done, but should have been, leave it blank. If an item is not applicable, mark N/A. Some items may not be necessary for a particular session. Write comments in the space available. Then, after the visit, share your observations with the counselor in a private place and discuss.

## Process

## Assessment

### Beginning (and throughout)

#### Establish and maintain rapport with the client

1 Needs Improvement	2 Satisfactory	3 Excellent
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|---|---|---|---|-----|
| • Warmly greet the client, introduce yourself. .... | 1 | 2 | 3 | N/A |
| • Discuss the reason(s) for the visit .....         | 1 | 2 | 3 | N/A |
| • Explain confidential services .....               | 1 | 2 | 3 | N/A |
| • Ask open-ended questions .....                    | 1 | 2 | 3 | N/A |
| • Actively listen and share your perceptions .....  | 1 | 2 | 3 | N/A |
| • Affirm client responses .....                     | 1 | 2 | 3 | N/A |
| • Summarize key points .....                        | 1 | 2 | 3 | N/A |

Other practices observed:

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Comments

### Middle

#### Assess the client's needs and personalize discussions accordingly

1 Needs Improvement	2 Satisfactory	3 Excellent
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- |  |   |   |   |     |
|--|---|---|---|-----|
| • Review and update the client's medical, sexual and social history .....  | 1 | 2 | 3 | N/A |
| • Ask about the client's thoughts and desires regarding future pregnancy.....  | 1 | 2 | 3 | N/A |
| • Explore client preferences regarding method characteristics.....<br>(risk of pregnancy, how method is used, menstrual side effects,<br>other side effects, and other considerations) | 1 | 2 | 3 | N/A |
| • Ask about client knowledge and experience with birth control .....   | 1 | 2 | 3 | N/A |
| • Respectfully explore factors that may influence method preference .....  | 1 | 2 | 3 | N/A |
| (past experiences, beliefs, cultural and religious considerations,<br>and feelings about the methods)  |   |   |   |     |

Other practices observed:

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Comments

**Middle continued**

<b>Work with the client interactively to establish a birth control method plan</b>	<b>1 Needs Improvement</b>	<b>2 Satisfactory</b>	<b>3 Excellent</b>	
<ul style="list-style-type: none"> <li>• Help the client identify the method that matches their preferences ..... 1 2 3 N/A</li> <li>• Ask open-ended questions about concerns related to method choice..... 1 2 3 N/A</li> <li>• Discuss partners and others who may influence decision making and method use ..... 1 2 3 N/A</li> <li>• Help the client make a plan for correct use of their selected method..... 1 2 3 N/A</li> <li>• Include information about STD/HIV protection and emergency contraception, as appropriate ..... 1 2 3 N/A</li> </ul> <p>Other practices observed:</p> <hr/> <hr/>				Comments

<b>Provide information that can be understood and retained by the client</b>	<b>1 Needs Improvement</b>	<b>2 Satisfactory</b>	<b>3 Excellent</b>	
<ul style="list-style-type: none"> <li>• Actively engage the client in conversation (not a presentation) ..... 1 2 3 N/A</li> <li>• Provide accurate information ..... 1 2 3 N/A (correct use, effectiveness, benefits, side effects, potential risks, STD/HIV prevention)</li> <li>• Use clear, understandable words, images, models and/or sample methods... 1 2 3 N/A</li> <li>• Use numbers and comparisons that are easy to understandd ..... 1 2 3 N/A</li> <li>• Provide balanced, unbiased, tailored information ..... 1 2 3 N/A</li> <li>• Assess and address myths and misinformation in a respectful and affirming way..... 1 2 3 N/A</li> </ul> <p>Other practices observed:</p> <hr/> <hr/>				Comments

**Closing**

<b>Confirm client understanding</b>	<b>1 Needs Improvement</b>	<b>2 Satisfactory</b>	<b>3 Excellent</b>	
<ul style="list-style-type: none"> <li>• Ask the client to tell and show the main things they learned (teach-back) and provide additional information as needed ..... 1 2 3 N/A</li> <li>• Address possible barriers to method use, specific to the client and their method ..... 1 2 3 N/A</li> <li>• Confirm the client’s plan for correct method use and follow up ..... 1 2 3 N/A (including what to do if dissatisfied with the method, back-up method, STD/HIV protection, and emergency contraception, as needed)</li> <li>• Provide contact information and future opportunities for follow up, other methods or services ..... 1 2 3 N/A</li> <li>• Summarize key points and end with a friendly close..... 1 2 3 N/A</li> </ul> <p>Other practices observed:</p> <hr/> <hr/>				Comments

**Improvement Plan:**

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