

# PRIMARY CARE CHECKLIST

*Consider the following:*

- 1** Discuss the main reason for the visit ☒
- 2** Check for emergency signs & symptoms ☒
- 3** Document vital signs ☒
- 4** Review any healthcare interaction since last visit ☒
- 5** Discuss social and other factors that influence health ☒
- 6** Review allergies, medications and any related concerns ☒
- 7** Do a relevant physical examination ☒
- 8** Discuss diagnoses and update the problem list ☒
- 9** Discuss healthy choices, prevention & immunizations ☒
- 10** Discuss & document follow-up, including when to seek urgent care ☒

- |                                     |    |  |
|-------------------------------------|----|--|
| <input checked="" type="checkbox"/> | 1  | Discuss the main reason for the visit                            |
| <input checked="" type="checkbox"/> | 2  | Check for emergency signs & symptoms                             |
| <input checked="" type="checkbox"/> | 3  | Document vital signs   |
| <input checked="" type="checkbox"/> | 4  | Review any healthcare interaction since last visit               |
| <input checked="" type="checkbox"/> | 5  | Discuss social and other factors that influence health           |
| <input checked="" type="checkbox"/> | 6  | Review allergies, medications and any related concerns           |
| <input checked="" type="checkbox"/> | 7  | Do a relevant physical examination                               |
| <input checked="" type="checkbox"/> | 8  | Discuss diagnoses and update the problem list                    |
| <input checked="" type="checkbox"/> | 9  | Discuss healthy choices, prevention & immunizations              |
| <input checked="" type="checkbox"/> | 10 | Discuss & document follow-up, including when to seek urgent care |

*Consider the following:*

## PRIMARY CARE CHECKLIST



## PRIMARY CARE CHECKLIST

*Consider the following:*

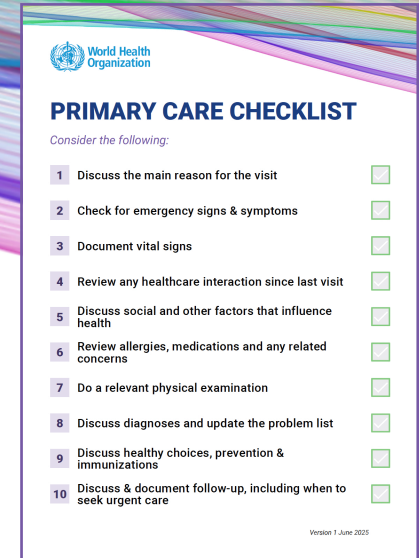
- |    |  |                                     |
|----|--|-------------------------------------|
| 1  | Discuss the main reason for the visit                            | <input checked="" type="checkbox"/> |
| 2  | Check for emergency signs & symptoms                             | <input checked="" type="checkbox"/> |
| 3  | Document vital signs   | <input checked="" type="checkbox"/> |
| 4  | Review any healthcare interaction since last visit               | <input checked="" type="checkbox"/> |
| 5  | Discuss social and other factors that influence health           | <input checked="" type="checkbox"/> |
| 6  | Review allergies, medications and any related concerns           | <input checked="" type="checkbox"/> |
| 7  | Do a relevant physical examination                               | <input checked="" type="checkbox"/> |
| 8  | Discuss diagnoses and update the problem list                    | <input checked="" type="checkbox"/> |
| 9  | Discuss healthy choices, prevention & immunizations              | <input checked="" type="checkbox"/> |
| 10 | Discuss & document follow-up, including when to seek urgent care | <input checked="" type="checkbox"/> |

# PRIMARY CARE CHECKLIST

The WHO Primary Care Checklist summarizes ten key components of the patient encounter and encompasses the “5C’s of primary care”: first contact accessibility, continuity, coordination, comprehensiveness and person-centeredness. It is intended to guide health workers in taking a structured systematic approach to a longitudinal primary care visit and allow flexibility to address individual needs. It serves as a practical tool to enhance communication, improve safety, and promote a person-centered visit.

## Reference notes

1. **Discussed the main reason for this visit:** The way a person expresses their reason for a visit provides critical information for a primary care encounter.
2. **Checked for emergency signs & symptoms:** Early recognition of life-threatening illness or injury is essential to reduce morbidity and mortality. Every person should be evaluated for danger signs and symptoms at the beginning of each encounter. If present, initiate appropriate interventions and arrange emergency transfer.
3. **Document vital signs:** Checking and documenting vital signs is important and should be done at every clinical encounter when relevant. Vital signs should include respiratory rate, heart rate, blood pressure, temperature, and oxygen saturation (where available).
4. **Review any healthcare interaction since last visit:** This includes any interim visits, home visits, pharmacy consultations, encounters with traditional providers, emergency unit visits, hospital admissions or referral follow-ups.
5. **Discuss social and other factors that influence health:** Social factors like housing, work, education, and access to resources impact health. Identify any challenges that affect a person’s ability to manage their health and address barriers to care.
6. **Review allergies, medications and any related concerns:** It is important to know about all medications that people are taking (including traditional therapies) and to understand if they are taking them as prescribed. Ask specifically about barriers to obtaining medicines and any side-effects.
7. **Do a relevant physical examination:** This may include a comprehensive or targeted exam depending on the reason for the encounter. Every clinical encounter should include some type of physical examination.
8. **Discuss diagnoses and update the problem list:** Keeping an up-to-date problem list is essential to effective primary care. This should include current and new diagnoses, specific health or social issues, and health maintenance interventions. This list can be rapidly reviewed at every visit.
9. **Discuss healthy choices, prevention & immunizations:** Specific promotive and preventive interventions are indicated across the life course and in association with specific conditions and contexts. This should include relevant vaccines, counselling and screening tests.
10. **Discuss & document follow-up, including when to seek urgent care:** Follow-up instructions should be explicitly discussed and documented. This should include any planned appointments or referrals and specific instructions on when to seek urgent care. Effective documentation improves continuity and coordination of care and enhances patient safety. Every visit should conclude with written or electronic documentation.




The image shows a thumbnail of the WHO Primary Care Checklist form. It features the WHO logo at the top left, followed by the title 'PRIMARY CARE CHECKLIST'. Below the title, it says 'Consider the following:'. There are ten numbered items, each with a checkbox to its right. The items are: 1. Discuss the main reason for the visit, 2. Check for emergency signs & symptoms, 3. Document vital signs, 4. Review any healthcare interaction since last visit, 5. Discuss social and other factors that influence health, 6. Review allergies, medications and any related concerns, 7. Do a relevant physical examination, 8. Discuss diagnoses and update the problem list, 9. Discuss healthy choices, prevention & immunizations, and 10. Discuss & document follow-up, including when to seek urgent care. At the bottom right, it says 'Version 1 June 2025'.



# PRIMARY CARE CHECKLIST

The WHO Primary Care Checklist summarizes ten key components of the patient encounter and encompasses the “5C's of primary care”: first contact accessibility, continuity, coordination, comprehensiveness and person-centeredness. It is intended to guide health workers in taking a structured systematic approach to a longitudinal primary care visit and allow flexibility to address individual needs. It serves as a practical tool to enhance communication, improve safety, and promote a person-centered visit .



The thumbnail shows a smaller version of the checklist form. It includes the WHO logo, the title 'PRIMARY CARE CHECKLIST', the instruction 'Consider the following:', and a list of 10 items, each with a checkbox. The items are: 1. Discuss the main reason for the visit, 2. Check for emergency signs & symptoms, 3. Document vital signs, 4. Review any healthcare interaction since last visit, 5. Discuss social and other factors that influence health, 6. Review allergies, medications and any related concerns, 7. Do a relevant physical examination, 8. Discuss diagnoses and update the problem list, 9. Discuss healthy choices, prevention & immunizations, 10. Discuss & document follow-up, including when to seek urgent care. The version number 'Version 1 June 2025' is at the bottom right.

## Reference notes

- Discussed the main reason for this visit:** The way a person expresses their reason for a visit provides critical information for a primary care encounter.
- Checked for emergency signs & symptoms:** Early recognition of life-threatening illness or injury is essential to reduce morbidity and mortality. Every person should be evaluated for danger signs and symptoms at the beginning of each encounter. If present, initiate appropriate interventions and arrange emergency transfer.
- Document vital signs:** Checking and documenting vital signs is important and should be done at every clinical encounter when relevant. Vital signs should include respiratory rate, heart rate, blood pressure, temperature, and oxygen saturation (where available).
- Review any healthcare interaction since last visit:** This includes any interim visits, home visits, pharmacy consultations, encounters with traditional providers, emergency unit visits, hospital admissions or referral follow-ups.
- Discuss social and other factors that influence health:** Social factors like housing, work, education, and access to resources impact health. Identify any challenges that affect a person's ability to manage their health and address barriers to care.
- Review allergies, medications and any related concerns:** It is important to know about all medications that people are taking (including traditional therapies) and to understand if they are taking them as prescribed. Ask specifically about barriers to obtaining medicines and any side-effects.
- Do a relevant physical examination:** This may include a comprehensive or targeted exam depending on the reason for the encounter. Every clinical encounter should include some type of physical examination.
- Discuss diagnoses and update the problem list:** Keeping an up-to-date problem list is essential to effective primary care. This should include current and new diagnoses, specific health or social issues, and health maintenance interventions. This list can be rapidly reviewed at every visit.
- Discuss healthy choices, prevention & immunizations:** Specific promotive and preventive interventions are indicated across the life course and in association with specific conditions and contexts. This should include relevant vaccines, counselling and screening tests.
- Discuss & document follow-up, including when to seek urgent care:** Follow-up instructions should be explicitly discussed and documented. This should include any planned appointments or referrals and specific instructions on when to seek urgent care. Effective documentation improves continuity and coordination of care and enhances patient safety. Every visit should conclude with written or electronic documentation.