Implementing the IDEAL Discharge
Step 2: Creating Your Implementation Strategy

Presented by:
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Amy Daly is a licensed nursing home administrator with over 20 years of leadership and long-term care management experience. In addition to her work as a vice president of long-term care and facility administrator, Amy has served on the boards of the Genesee Health Facilities Association (as treasurer and education committee member) and the Genesee Health Facilities Foundation. In addition, Amy serves as a New York State Department of Health Informal Dispute Resolution (IDR) panel member and has been an adjunct clinical instructor of dental hygiene at Monroe Community College. Amy has a master's degree in health promotion and a bachelor's degree in health sciences.

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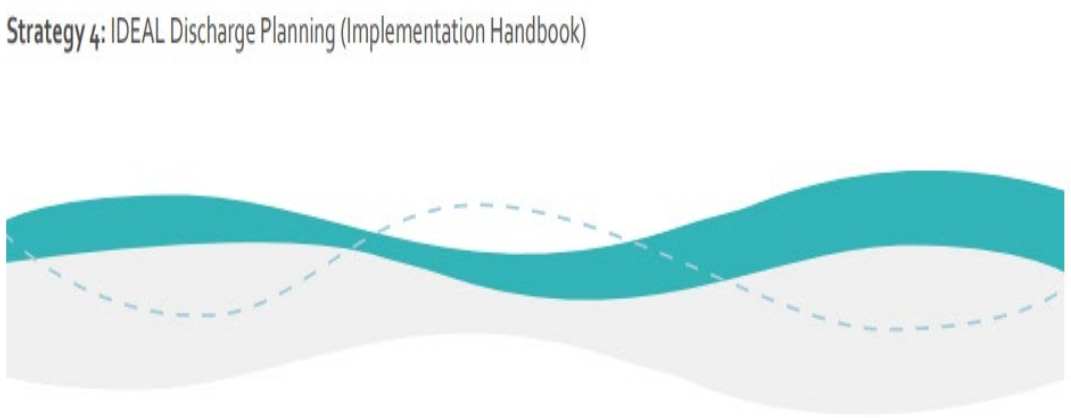
Implementation Step 2: AHRQ IDEAL Discharge Planning Implementation Handbook



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Goal Setting

- ✓ **Specific**
- ✓ **Measurable**
- ✓ **Attainable**
- ✓ **Relevant**
- ✓ **Time-based**

Examples:

- "Two units implemented the selected IDEAL Discharge Planning tools within six months."
- "Have two tools from the AHRQ IDEAL Discharge implemented in three units within six months."

Key Elements

1. Adapt for your facility

- Select specific elements
- Obtain input from clinicians, staff, patient and family advisors
- Clarify roles and responsibilities and approvals needed

2. Decide how to adopt in your facility

- Brand materials with your facility logo
- Identify key roles and responsibilities
- Determine if the selected tool will replace an existing tool or be integrated into current tools or processes

3. Plan clinical training

- Identify respected facilitators
- Identify patient and family advisors to help conduct or facilitate the training
- Determine the number and schedule of the trainings

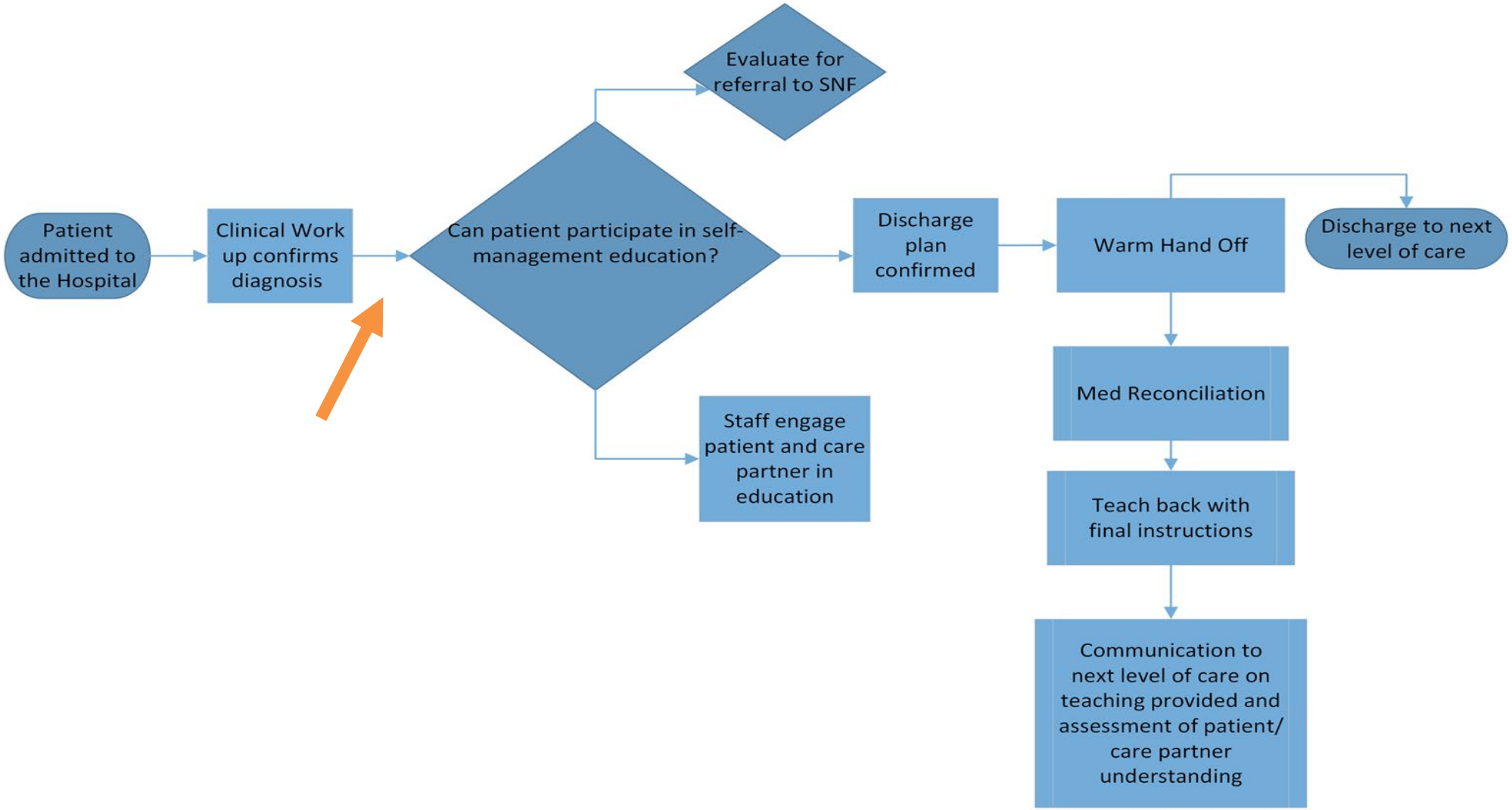
AHRQ IDEAL Discharge Tools

Tools for this strategy include --

1. IDEAL Discharge Planning Overview, Process, and Checklist -- Handout that gives an overview of the IDEAL Discharge Planning process and includes a checklist that could be completed for each patient.
   [Microsoft Word version - 720.52 KB ; PDF version - 188.59 KB]
2. Be Prepared to Go Home Checklist and Booklet
   a. Checklist highlights what the patient and family need to know before leaving the hospital and gives examples of questions they can ask. Note: The Word document uses hidden text. To see the text, go to Word Options, select Display, and choose the Hidden text box.
      [Microsoft Word version - 1.2 MB PDF version - 159.66 KB]
   b. Booklet contains the checklist plus additional space for writing information. Note: The Word document uses hidden text. To see the text, go to Word Options, select Display, and choose the Hidden text box.
      [Microsoft Word version - 511.84 KB PDF version - 254.71 KB]
3. Improving Discharge Outcomes with Patients and Families -- Handout for clinicians that describes the new discharge planning process.
   [Microsoft Word version - 689.85 KB ; PDF version - 104.82 KB]
4. Care Transitions from Hospital to Home: IDEAL Discharge Planning Training -- PowerPoint presentation to train clinicians and hospital staff to support the efforts of patient and family engagement related to discharge planning.
   [Microsoft PowerPoint version - 229.13 KB ; PDF version - 218.92 KB]

Users can download materials in zipped format by selecting: http://www.ahrq.gov/downloads/patfamilyengageguide/strategy4zipfiles.zip; 14.24 MB.

Sample high level flow chart



IDEAL Discharge Planning Tools

Tool 1: IDEAL Discharge Planning Overview, Process, and Checklist informs all clinicians about the new discharge planning process and keeps track of when tasks are accomplished.

IDEAL Discharge Planning Checklist

Fill in, initial, and date next to each task as completed.

Patient Name: _____

Initial Nursing Assessment	Prior to Discharge Planning Meeting	During Discharge Planning Meeting	Day of Discharge
_____Identified the caregiver at home and backups _____Told patient and family about white board _____Elicited patient and family goals for hospital stay _____Informed patient and family about steps to discharge	_____Distributed checklist and booklet to patient and family with explanation _____Scheduled discharge planning meeting Scheduled for ____/___/_____at _____ [time]	_____Discussed patient questions _____Discussed family questions _____Reviewed discharge instructions as needed _____Used Teach Back _____Offered to schedule followup appointments with providers. Preferred dates / times for: PCP: Other:	Medication _____Reconciled medication list _____Reviewed medication list with patient and family and used teach back Appointments and contact information _____Scheduled followup appointments: 1) With _____ on ____/____/_____at_____ [time] 2) With _____ on ____/____/_____at_____ [time] _____Arranged any home care needed _____Wrote down and gave appointments to the patient and family _____Wrote down and gave contact information for followup person after discharge

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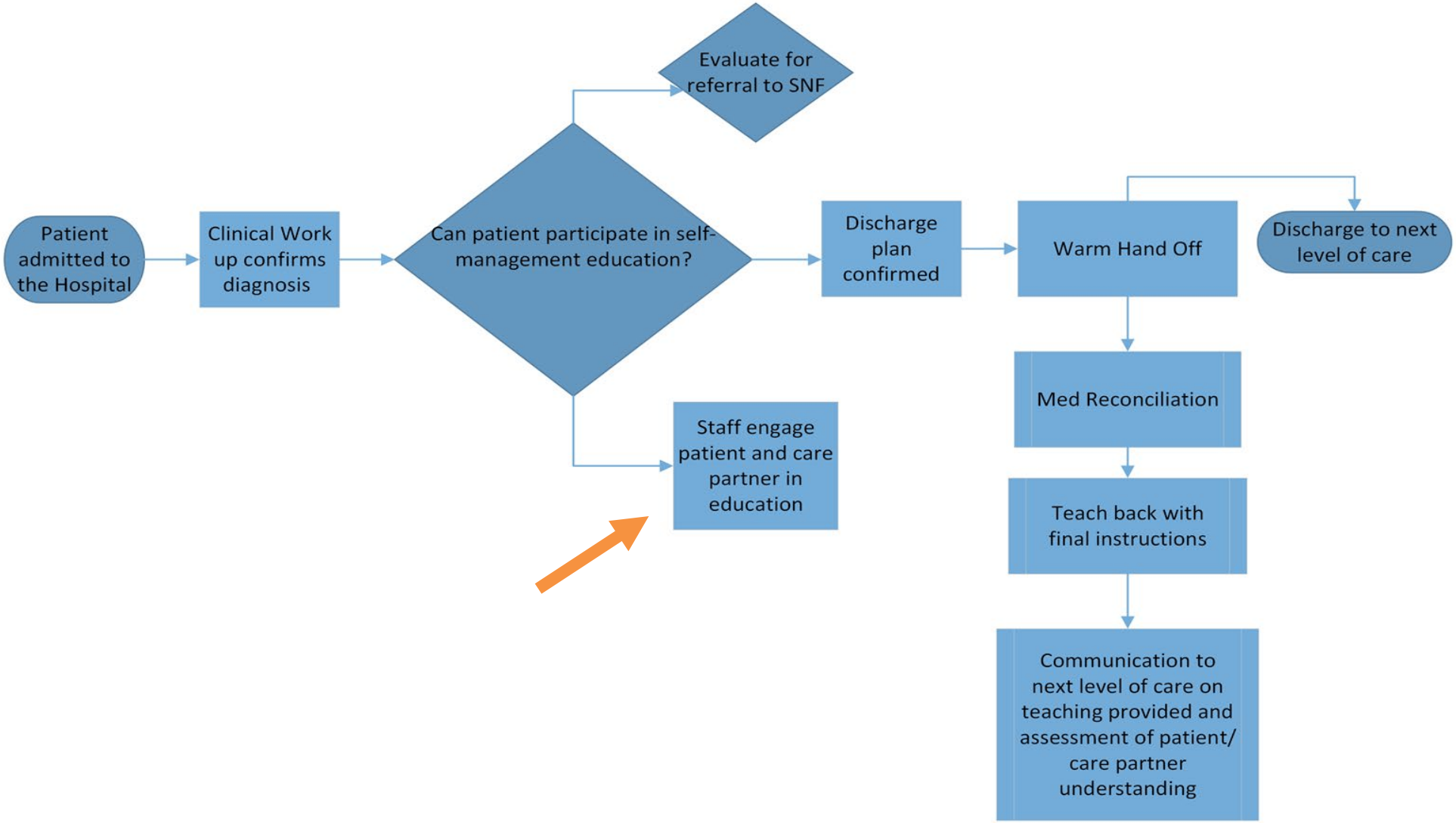
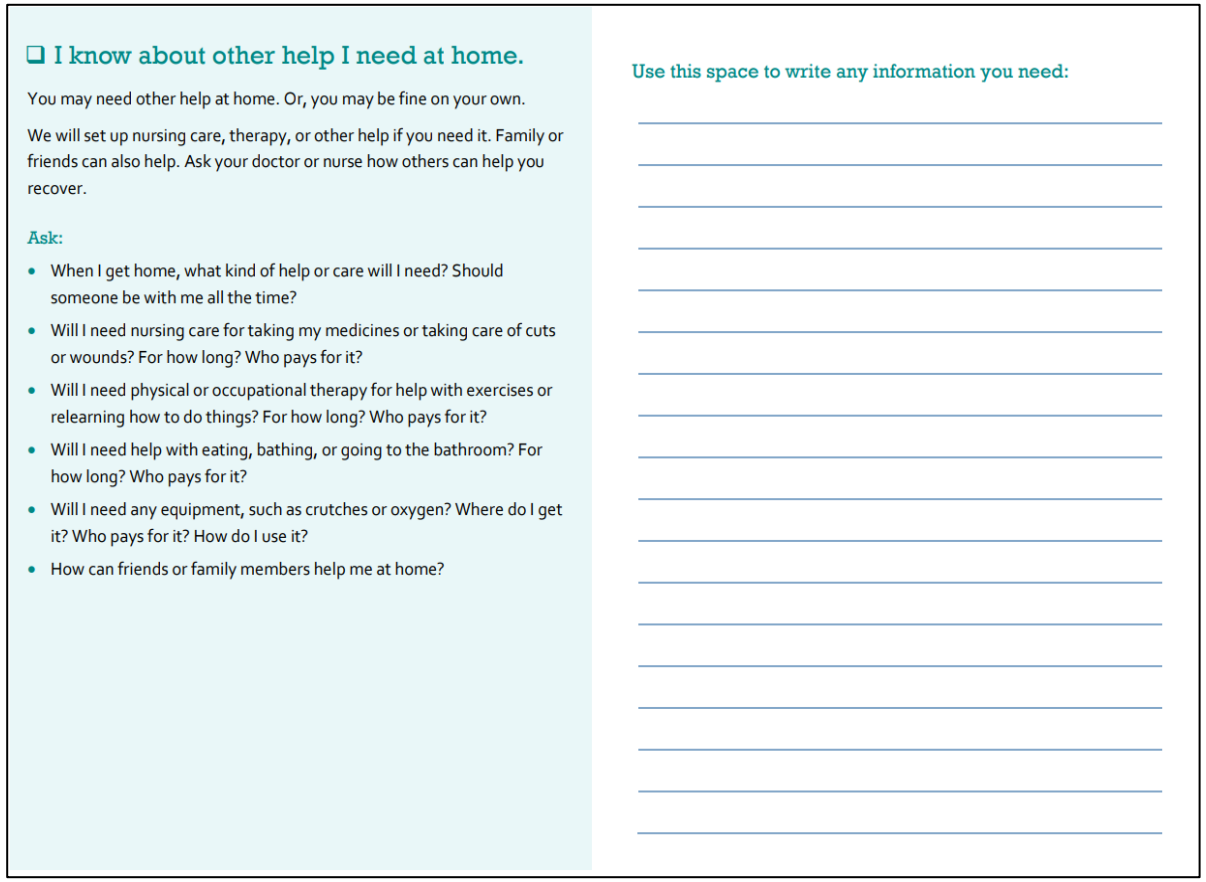


IDEAL Discharge Planning Tools



❑ I know about other help I need at home.

You may need other help at home. Or, you may be fine on your own.

We will set up nursing care, therapy, or other help if you need it. Family or friends can also help. Ask your doctor or nurse how others can help you recover.

Ask:

- When I get home, what kind of help or care will I need? Should someone be with me all the time?
- Will I need nursing care for taking my medicines or taking care of cuts or wounds? For how long? Who pays for it?
- Will I need physical or occupational therapy for help with exercises or relearning how to do things? For how long? Who pays for it?
- Will I need help with eating, bathing, or going to the bathroom? For how long? Who pays for it?
- Will I need any equipment, such as crutches or oxygen? Where do I get it? Who pays for it? How do I use it?
- How can friends or family members help me at home?

Use this space to write any information you need:

Tool 2a and 2b: Be Prepared to Go Home Checklist and Booklet are companion pieces that help the patient and family identify questions and concerns about going home.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diverging
challenge
game
revolution
adaptation
evolution
fundamental
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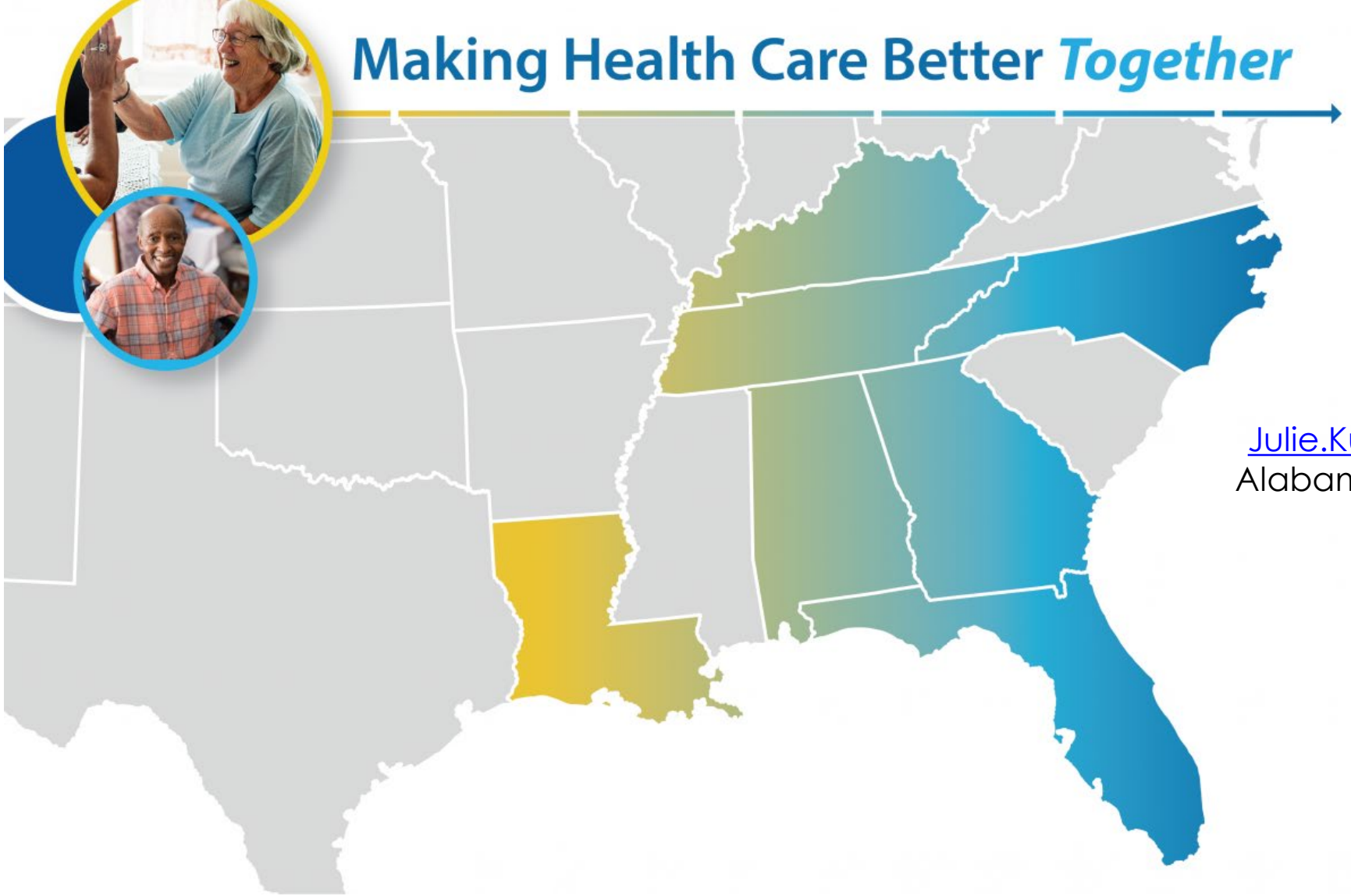

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