

Making Health Care Better Together

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PATIENT & FAMILY ENGAGEMENT (PFE)

COACHING PACKAGE

Purpose: Use the evidence-based best practices and resources to create quality improvement action plans.

Category	Best Practices/Interventions	Links to Resources, Toolkits, Webinars, Etc.
Metric 1: Planning checklist provided to patients during pre-admission and hospital stay to ensure they are knowledgeable about their stay and the care that will be provided (e.g., elective surgery).	<p>Inform clinicians and staff about the use and purpose of the preadmission planning checklist, including why it is important and how it can help engage patients and families.</p> <p>Educate clinicians and staff about how the preadmission planning checklist should be discussed and used at various stages during the hospital stay to adjust the care plan as needed to reflect patients' and families' preferences, needs, and concerns.</p> <p>Delineate key roles and responsibilities to ensure accountability for reviewing and discussing the checklist with patients and family members.</p>	<p>Strategic Vision Roadmap for Person and Family Engagement-Metric Digest (AIR)</p> <p>Preadmissions Planning Checklist (IPRO)</p>
Metric 2: Discharge checklist provided to patients during their hospital stay and at discharge to ensure they understand their discharge instructions and follow-up care.	<p>IDEAL Discharge Planning:</p> <p>Include the patient and family as full partners in the discharge planning process</p> <p>Discuss with the patient and family five key areas to prevent problems at home:</p> <ol style="list-style-type: none"> 1. Describe what life at home will be like 2. Review medications 3. Highlight warning signs and problems 4. Explain test results 5. Make follow-up appointments <p>Educate the patient and family in plain language about the patient's condition, the discharge process, and next steps at every opportunity throughout the hospital stay</p>	<p>Care Transitions from Hospital to Home: IDEAL Discharge Planning</p> <p>CMS: Your Discharge Planning Checklist</p> <p>SMART Discharge Protocol</p>
	<p>Assess how well doctors and nurses explain the diagnosis, condition, and next steps in the patient's care to the patient and family and use teach back.</p> <p>Listen to and honor the patient and family's goals, preferences, observations, and concerns.</p>	

<p>Metric 3: Shift change huddles at bedside or bedside rounding with patients and families.</p>	<p>Introduce the nursing staff to the patient and family</p> <p>Invite the patient and family to take part in the bedside shift report.</p> <p>Open the medical record or access the electronic workstation in the patient's room.</p> <p>Conduct a verbal SBAR report with the patient and family. Use words that the patient and family can understand.</p> <p>Conduct a focused assessment of the patient and a safety assessment of the room.</p> <p>Review tasks that need to be done</p> <p>Identify and address patient and family needs or concerns.</p>	<p>Nurse Beside Shift Report</p> <p>SBAR Tool (IHI)</p> <p>Bedside Handoff Competency Check List</p>
<p>Metric 4: Accountable leader who is responsible for patient and family engagement in the hospital</p>	<p>Patient and/or family representatives from the community have been formally named as members of a PFAC or other hospital committee Meetings of the PFAC or other committees with patient and family representatives have been scheduled and conducted</p> <p>Seek and learn from the patient and family perspective, e.g. hospital leader rounds.</p>	<p>Strategic Vision Roadmap for Person and Family Engagement (AIR)</p> <p>Patient and Family Advisory Programs (IPFCC)</p> <p>Person & Family Engagement Toolkit (CMS)</p>
<p>Metric 5: Hospitals having an active PFE Committee or other committees where patients are represented and report to the Board.</p>	<p>Patient and Family Advisory Council (PFAC) Structure and Operations: Executive sponsor, bylaws, annual goals, meets regularly, and has an agenda and minutes for every meeting.</p> <p>PFAC Recruitment and Onboarding: Recruitment is ongoing, clinicians/staff members help identify potential members who reflect diversity of, and onboarding is provided covering the PFA role and hospital quality and safety work.</p> <p>PFAC Evaluation and Reporting: Annual evaluation that measures outcomes and impact of improvement activities, patient harm, and/or health disparities.</p>	<p>Working with Patients and Families as Advisors (AHRQ)</p> <p>Effective Patient & Family Advisory Councils</p> <p>Patient & Family Advisory Councils Blueprint (AHA)</p> <p>Examples of Annual Reports for Patient and Family Advisory Programs</p>

Professional Association/Other Websites

[PfP Strategic Vision Roadmap for Person and Family Engagement; Tips for Starting a PFAC for Quality and Safety](#)

[Institute for Patient and Family Centered Care](#)

[Patient and Family Centered Care PFCC partners](#)

[The Beryl Institute](#)

[Institute for Healthcare Improvement](#)

[AHA Center for Innovation](#)

[Register to request tools](#)

[AHA: Patient & Family Advisory Councils: Resources for the Field](#)

Please visit the Alliant HQIC website for more resources, webinars and success stories

[Alliant HQIC website](#)

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