

Making Health Care Better Together

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PATIENT & FAMILY ENGAGEMENT (PFE)

COACHING PACKAGE

Purpose: Use the evidence-based best practices and resources below 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 pre-admission planning checklist, including why it is important and how it can help engage patients and families.</p> <p>Identifies the person who will serve as the patient care partner, helping in care and care planning during and after the stay.</p> <p>Encourages an active partnership in quality and patient safety from the very start of the hospital stay.</p>	<p>Strategic Vision Roadmap for Person and Family Engagement-Metric Digest (AIR)</p> <p>Pre-admissions Planning Checklist (IPRO)</p> <p>Metric 1: Pre-admission Planning Checklist (AIR)</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 text results 5. Make follow-up appointments <p>Educate the patient and family in plain language about the patient's condition, the discharge process and the next steps at every opportunity throughout the hospital stay.</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>Care Transitions from Hospital to Home: IDEAL Discharge Planning</p> <p>CMS: Your Discharge Planning Checklist</p> <p>SMART Discharge Protocol</p> <p>Taking Care of Myself: A Guide for When I Leave the Hospital (AHRQ)</p>

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<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>Identify any risk or safety concerns that family/ patient or hospital team may have.</p>	<p>Nurse Beside Shift Report</p> <p>SBAR Tool (IHI)</p> <p>Bedside Handoff Competency Check List</p> <p>How Bedside Handoff Can Improve Patient Outcomes</p> <p>Bedside Handoff Competency Check List (Studer Group)</p> <p>Applying Patient- And Family-Centered Concepts To Bedside Rounds (IPFCC)</p>
<p>Metric 4: Accountable leader who is responsible for patient and family engagement in the hospital.</p>	<p>Hospital has a designated individual or individuals with leadership responsibility and accountability for patient and family engagement.</p> <p>Patient and/or family representatives from the community have been formally named as members of a Patient and Family Advisory Committee (PFAC) or other hospital committee.</p> <p>The leader is involved with PFAC meetings or other committees with patient and family representatives who give input and feedback, identify opportunities for improvement, and help plan and implement changes.</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>Patient Safety Leadership WalkRounds™ (IHI)</p> <p>Staff Liaison to Patient and Family Advisory Councils and Other Collaborative Endeavors (IPFCC)</p> <p>PFE Implementation Guide for Hospitals Practice 4: Designated PFE Leader (AIR)</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, 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 the diversity of the patient population, 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, the impact of improvement activities, patient harm and/or health disparities.</p>	<p>PFE Charter Template</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

[Guide to Patient and Family Engagement in Hospital Quality and Safety \(AHRQ\)](#)

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

[Rural Hospital Patient and Family Engagement Toolkit \(CHA\)](#)

[Patient and Family Engagement CUSP Toolkit \(AHRQ\)](#)

[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](#)

Visit the Alliant HQIC Website for More Resources, Webinars, and Success Stories

[Alliant HQIC website](#)

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