How to Create Opportunities to Engage with Patients and Families at Admissions and Beyond

Partnership for Patients (PfP) PFE Learning Event

July 11, 2017
Welcome and Roll Call

Welcome Back!

Who is in the room?

Pam Dardess, MPH
American Institutes for Research
Project Manager, PfP PFEC
A Framework for Today

• **National Perspective:** Tom Workman, PFEC

• **Patient Perspective:** Jean Hergott, PA-C and Heidi McCoy, MS, Michigan Medicine, University of Michigan

• **Panel Discussion:** Bev Johnson, IPFCC; Sue Sheridan, CMS

• **Moving Forward in Action: Steps We Can Take Today:** Tom Workman, PFEC
National Perspective

Objectives

• Language, intent, and achievement of PFE Metric 1
• Patient safety topics to include in a planning checklist
• Benefits of a planning checklist

Tom Workman, PhD
American Institutes for Research
Senior Advisor, PfP PFEC
PFE Metric 1

Planning checklist for scheduled admissions:
Implementation of a planning checklist for patients known to have a planned admission to the hospital (e.g. for elective surgery).
The Intent of PFE Metric 1

• For scheduled hospital admissions (surgery, labor & delivery)
• Create a mechanism for patients and families to discuss concerns, preferences, and issues for the hospital stay
• The physical checklist serves as a list of items and topics for the conversation
Achieving the Metric

We have achieved this metric when:

- Hospital provides a planning checklist to patients with all scheduled admissions
- At admission, hospital staff discuss checklist with patient and family
Engagement from the Start

• Helping patients and families know what to expect throughout the stay
• Addressing patient needs or risk vulnerabilities
• Planning for discharge
• Invitation to partner throughout the stay to ensure safety and quality
The Approach: Planning Checklist

• List of items that guide the conversation

• Best practice: A document that is shared with the patient/family to review with admissions or clinical staff

• Document is kept with patient/family for reference when needed
What’s in a planning checklist?

- What to expect during your stay
  - Pain management
  - Clinician rounds
  - Safety efforts and precautions
- Patient Bill of Rights
- Things we’ll need from you
- Invitation to ask questions
- Discharge plan

Discussing your treatment plan.
When you enter the hospital, you sign a general consent to treatment. In some cases, such as surgery or other procedures, you may be asked to confirm in writing you understand what is planned and agree to it. This process protects your right to consent to or refuse a treatment. Your doctor will explain the medical consequences of refusing recommended treatment. This process also protects your right to decide if you want to participate in a research study.

Getting information from you.
Your caregivers need complete and correct information about your health and coverage so they can make good decisions about your care. This includes:
- Past illnesses, surgeries or hospital stays.
- Past allergic reactions.
- Any medicines or dietary supplements (such as vitamins and herbs) that you are taking.
- Any network or admission requirements under your health plan.

Understanding your health care goals and values.
You may have health care goals and values or spiritual beliefs that are important to your well-being. They will be taken into account as much as possible throughout your hospital stay. Make sure your doctor, family and care team know your wishes.

Understanding who should make decisions when you cannot.
We will ask you on admission if you have signed a health care power of attorney stating who should speak for you if you become unable to make health care decisions for yourself, or a “living will” or “advance directive” that states your wishes about end-of-life care. You should give copies to your doctor, family and nurse or registration clerk.

If you or your family members need help making difficult decisions, chaplains, and other are available to assist. A brochure and sample copies of the forms are available in the Admissions Office at 835-4900.

Protection of your privacy.
We respect the confidentiality of your relations with our doctor and other caregivers, and the sensitive information about your health and health care which are part of those relationships. Stat and federal laws and hospital operating policies protect the privacy of your medical information. You will receive a Notice of Privacy Practices that describes the way we use, disclose and safeguard patient information. The notice explains how you can obtain a copy of information from our records about your care.
Other Patient Safety Topics

• Concerns and preferences for their care
• Potential safety issues (e.g., pre-admission medicines, history of infections, etc.)
• Home issues as they relate to discharge (e.g., needs for additional support, transportation, and care coordination)
Why This is Important

• Enables an active partnership in quality and safety from the very start of the hospital stay
• Helps patients clarify expectations about the hospital stay and their care
• Allows clinical staff to know the concerns, interests, and goals of the patient
• Identifies potential safety issues so that patient and clinical staff can work in partnership to avoid them
Northern Westchester Hospital: A Guide to Help You Prepare for Your Surgical Procedure

Make it....
- Easy to Access
- Simple to Understand
- Prepare me BEFORE surgery about my care at home

Create Opportunities of Group Learning and Support:
Joint Class, lead by Ortho Physician Assistant with Case Manager, PT, Nursing and Integrative Medicine

Preparation for Surgery
Questions to Ask Your Surgeon
Medications
Preventing Surgical Site Infections (SSIs)
Three Weeks Prior to Surgery
Two Weeks Prior to Surgery
Twenty-Four Hours Prior to Surgery
The Day of Your Surgery
Visitors
Discharge from the Hospital
Preparing for Your Homecoming
Hand Hygiene
Smoke-Free Campus
Integrative Medicine
The Role of Hospitalists and Other Physicians
Pre-Admission Testing Questionnaire
Important Appointments and Contact Information

Guided Audio Imagery
Listen to these therapeutic recordings from home or at the Hospital. Guided Imagery has been shown to provide relief during stressful times. And reducing stress can positively affect healing.
- NWH Meditation for Stress Management
  Author: Susan Raskin
- NWH Relaxation Pain Recording
  Author: Toni Russo
- NWH Relaxation Pre-Procedure
  Author: Toni Russo
Benefits of a Planning Checklist

• Helps patients feel prepared for stay/surgery and can reduce anxiety
• Helps patients feel more confident about playing a role in their health and health care
• Improves patient experience (e.g., HCAHPS scores – pain management, discharge information, communication about medicine)
• Helps clinicians validate that patients/caregivers understand discharge information and are prepared to leave the hospital

Source: Northern Westchester Hospital, PFE Metric 1 Learning Module
Patient Perspective: Michigan Medicine

Jean Hergott, PA-C
Physician Assistant
University of Michigan, Orthopaedics

Heidi McCoy, MS
Project Manager, Clinical Design & Innovation Program, University of Michigan
Your Total Joint Journey

Preparing and Recovering from My Hip Replacement Surgery

WELCOME
We've created this booklet to help you prepare for your surgery. It contains helpful information for you and your family and provides pockets to help you keep your paperwork together. Please bring this book to all of your appointments and to the hospital. Thank you for choosing the University of Michigan Health System.

Preparing and Recovering from My Knee Replacement Surgery

WELCOME
We've created this booklet to help you prepare for your surgery. It contains helpful information for you and your family and provides pockets to help you keep your paperwork together. Please bring this book to all of your appointments and to the hospital. Thank you for choosing the University of Michigan Health System.
Check List for Success

☐ Read
  - Read this “Preparing and Recovering from My Hip Replacement Surgery” before surgery. Refer to it whenever you have any questions.

☐ Stop
  - Taking medications listed on page 16.
  - Taking any Vitamins and supplements.
  - Do not stop taking your diabetes, high blood pressure or other prescription medications unless instructed to do so at your pre-op appointment.

☐ Purchase (see page 13)
  - An over the toilet commode or raised toilet seat. Please install before your surgery.
  - Laxatives (Miralax® and Colace® or Senna; no prescription necessary).

☐ Call for your surgery time
  - Call (866) 936-8800 the morning before your surgery to find out what time to arrive at the hospital for surgery.
  - If your surgery is on a Monday, call the Friday before your surgery.

☐ Prepare
  - Shower the night before and the morning of surgery. Follow the instructions on page 45.
  - Pack your bag following the instructions on page 18.

☐ Bring
  - “Preparing and Recovering from my Hip Replacement Surgery” with you to the hospital.
  - Blue Pre-Admission Type & Screen Information (given to you at your pre-op history and physical exam).

☐ Plan your recovery
  - Plan to go home from the hospital 1 day after surgery.
  - If you plan to go to a short-term care facility, bring the name of a first and second choice facility with you to the hospital. Our nurse case manager will make arrangements when she meets with you in the hospital.
Ready, Set, Go

- Total Joint Replacement Pre-op class
  - Physical Therapy (PT), Occupational Therapy (OT), and Research Associates in attendance

- Benefits to sharing and discussing guidebook content with patients prior to surgery
  - Patient and Support Coach preparedness
  - Reducing Length of Stay (LOS)
  - Reducing Readmissions
  - Reducing Skilled Nursing Facility (SNF) admissions
  - Reducing Opioid usage
Partners in the Guidebook Journey

• Patient and Family Centered Care (PFCC) Program
  – “Collaborative Conversations”
  – Patient Feedback from Pre-Op class
  – Lean project (Gemba walks)

• Patient Education
  – Plain Language guidelines to build guidebooks

• Multidisciplinary Team
  – Patients & Families are as critical to the team as the Surgeons
  – Patients have input to their care
Panel Discussion

Beverley H. Johnson, President and Chief Executive Officer, IPFCC

Sue Sheridan, MBA, MIM, DHL Patient and Family Engagement Advisor, CMS
Moving Forward in Action: Steps We Can Take Today

• **HIINs**
  – Help hospitals identify barriers and solutions to meaningful PFE throughout the hospital stay

• **Hospitals**
  – Give patients multiple opportunities and methods to learn
  – Work with patient and family advisors/PFACs to anticipate patients’ needs
  – Build patient and family priorities and concerns into the inpatient plan of care

• **Patient and family advisors**
  – Share your experiences and suggestions to improve engagement throughout the hospital stay
Resources

• PFE Metric 1 Learning Module (PFEC)*
• PfP Strategic Vision Roadmap for PFE (PFEC)*
• Examples of Checklists
  – What You Need to Know Before and After Surgery (WHO) - http://www.who.int/surgery/publications/patients_communication_tool.pdf?ua=1

*Available at:
http://www.healthcarecommunities.org/ResourceCenter/PartnershipforPatientsLibrary.aspx?CategoryId=836642&EntryId=111951
Engage With Us!

• **PFE Affinity Group:** Models to Deepen Buy-in for PFE Among Hospital Executives and Trustees  
  – July 25, 2:00 – 3:00 pm ET

• **PFE Learning Event:** How to Help Hospitals Get Buy-in for PFE at the Governance Level (PFE Metric 5)  
  – August 8, 2:00 – 3:00 pm ET

Do you have a best-practice or success story? Please share them with us at [PFE@air.org](mailto:PFE@air.org).
Thank You!