Person and Family Engagement (PFE) Affinity Group

Processes for Onboarding New Patient and Family Advisors

July 23, 2019
2:00 – 3:00 pm EST
Welcome and Roll Call

Welcome!

Who is in the room?

Kellie Goodson, MS, CPXP
PFE Affinity Group HIIN Co-Lead
Vizient HIIN
PFE Affinity Group HIIN Co-Leads

Kellie Goodson, MS, CPXP  
Vizient HIIN

Carolyn Kazdan, MHSA, NHA  
NY HIIN

Tara Bristol Rouse, MA  
AHA/HRET HIIN
Intent of Today’s Call

• Hear from HIINs and hospitals about challenges and successes of onboarding new Patient and Family Advisors (PFAs)
• Discuss lessons learned about building capacity for continued PFE implementation in hospitals
• Share strategies for creating a sustainable culture of PFE despite challenges
• Discuss how to move forward together in action, including offers and requests to sustain and continue momentum around PFE gains
A Framework for Today

- **Panel Member Presentations:**
  - **HIIN Perspective:** Joan M. Gallegos, MSW, RN, Director, Community Engagement (Comagine Health HIIN)
  - **Hospital Perspective:** Sharon Cross, Program Manager, Patient/Family Experience Advisor Program, Ohio State University (Vizient HIIN)
  - **HIIN Perspective:** Carolyn Kazdan, MHSA, NHA Quality Improvement Specialist, IPRO and Aashna Taneja, Project Manager, Healthcare Association Of New York State (NY HIIN)
  - **Patient and Family Advisor Perspective:** Brittany Guzinski, Patient Chair of NY Presbyterian Komansky PFAC (NY HIIN)

- **Discussion with the Panel:** Facilitated by Lisa Morrise, Executive Director, Consumers Advancing Patient Safety, PFE Contractor Team

- **Moving Forward in Action:** Kellie Goodson, MS, CPXP
Panel Member
Presentations and Discussion

Facilitated by:

Lisa Morrise
Executive Director, Consumers Advancing Patient Safety, PFE Contractor Team
Questions to Run On

• How does your organization approach orientation and training of PFAs?

• What advice would you give to a hospital when thinking about what orientation materials to include when bringing in new patient and family advisors?

• How does your organization address confidentiality and concerns around HIPAA when working with PFAs?

• How do you think efforts to train PFAs facilitate the creation of a sustainable PFE culture in your organization?
Comagine Health HIIN

Joan M. Gallegos, MSW, RN
Director, Community Engagement
Onboarding New Patient and Family Advisors

Joan M. Gallegos, MSW, RN
Director, Community Engagement
Comagine Health
Comagine Health: Who we are

Comagine Health, formerly Qualis Health and HealthInsight, is a national, nonprofit, health care consulting firm. We work collaboratively with patients, providers, payers and other stakeholders to reimagine, redesign, and implement sustainable improvements in the health care system. As a trusted, neutral party, we work in our communities to address key, complex health and health care delivery problems. In all our engagements and initiatives, we draw upon our expertise in quality improvement, care management, health information technology, analytics and research. We invite our partners and communities to work with us to improve health and redesign the health care delivery system.
Onboarding Advisors in a Quality Improvement Organization Setting

- Because Comagine Health is not a direct service provider, we recruit and onboard advisors that have the ability to:
  - Be systems thinkers
  - Analyze policies and their impacts
  - Are comfortable with ambiguity
  - Be passionate about their work
  - Be assertive and not afraid to speak up and advocate

- We also recruit advisors to represent the diverse populations touched by our work.
- Recruitment is through flyers, word of mouth, and outreach to community alliances and minority communities.
What to Avoid

- CAVE people! (Citizens Against Virtually Everything!)
Orienting and Training Patient and Family Advisors

- Interviews for potential advisors are done through an informal interview that is designed to assess for desired advisor characteristics.
  - Two staff people conduct the interview in a community-based setting, such as a local coffee shop.
- A structured application for membership is completed.
- A decision about membership after the interview and completion of the application.
- Advisors are invited to attend a future meeting to see if joining the Advisory Council is a good fit for them.
Orienting and Training Patient and Family Advisors (cont.)

- After advisor has agreed to join the Advisory Council, s/he is paired with a fellow advisor as a mentor.
- Basic materials are provided such as the Comagine Health mission, Gateways materials, list of Advisory Council accomplishments, etc.
- More 1:1 meetings with the new advisor are scheduled to determine ongoing adjustment to the new role.
- In the future, we are planning on also assigning a staff liaison for new advisors.
- All materials must be consumer friendly and No Acronyms Please!
Confidentiality

• Advisors sign a confidentiality form as part of their new orientation.
• We do not deal with patient specific information, rather policies, patient education materials, and aggregated data. However, personal advisor stories that are shared at meetings warrant a discussion on confidentiality.
Creation of a Patient and Family Engagement Culture at Comagine Health

• Having the patient voice is integral in designing patient and family engagement interventions.
• Leadership support of all meetings is essential.
• Prompt follow-up on advisor recommendations and feedback is essential to sustaining advisor involvement.
• Listen! Comagine Health has learned that we do not often identify what is most important to patients and families. Ask them!
Comagine Health Utah PFAC

- Winner of the 2018 National Orme Partnership Award
Contact Information

Joan M. Gallegos, MSW, RN
Director, Community Engagement
Comagine Health
jgallegos@comagine.org
Sharon Cross, MSW, CPXP
Program Director, Patient/Family Centered Care
Patient Experience Department
Onboarding New Patient/Family Experience Advisors

Sharon Cross, MSW, CPXP
Program Director, Patient/Family Centered Care
Patient Experience Department
sharon.cross@osumc.edu
Growth @ OSU Wexner Medical Center

2006
- 50% Advisor Program & 50% Volunteer Services
- 12 volunteers ‘grandfathered’ into Patient/Family Advisor Program (James Cancer Hospital committee members and speakers)

2008
- James Cancer Hospital Patient/Family Advisory Council formed
- 26 Advisors

2010
- Aligned with Patient Experience - across multiple hospitals
- 100% Patient/Family ‘Experience’ Advisors’
- System-Wide PFAC formed
- 72 Advisors

2017
- Ambulatory/Outpatient Expansion with 13 new PFACs
- 125 Advisors, 200 PFAC members
Need for Orientation and Training

- Due to expansion we realized training was needed
- PFEAs did not know they were a PFEA!
- Consistent messaging across the entire organization
  - PFEAs have basic understanding
  - Staff know PFEAs have been trained
- Increased request for:
  - Patients to speak - How do I share my story? What should I expect?
  - Advisor to join hospital committees - What’s my role?
  - Research Advisory Boards – What is the research process?
  - Patient/Family Advisory Councils
# Our Orientation and Training Plan

<table>
<thead>
<tr>
<th>PFEA Level</th>
<th>Opportunities Available</th>
<th>Credentialing/Annual Requirements</th>
<th>Training</th>
<th>Advisor/Member Benefits</th>
<th>Organizational Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>LEVEL 1 PFAC Member</td>
<td>- PFAC Only</td>
<td>✓ Review for outstanding Collections or PE Complaint ONLY ✓ 1 year commitment to attend Council meetings</td>
<td>✓ PFAC Orientation @ 1st meeting</td>
<td>Council Membership</td>
<td>Increased number of candidates for Advisory Councils</td>
</tr>
<tr>
<td>LEVEL 2 PFEA</td>
<td>- PFAC, Online Reviews, Focus Groups, Speakers Bureau</td>
<td>✓ Volunteer Credentialing (Background Check) ✓ Annual Review ✓ Flu Shot ✓ Minimum 6 hours participation per year</td>
<td>✓ Volunteer Orientation ✓ PFEA Orientation ✓ Speaker Training (Optional)</td>
<td>Volunteer Benefits Parking Passes</td>
<td>- Credentialled as volunteer - Standard Training - ‘Active’ PFEAs - Increased versatility for assignments</td>
</tr>
<tr>
<td>LEVEL 3 PFEA</td>
<td>- PFAC, Online Reviews, Focus Groups, Speakers Bureau, Committee Member</td>
<td>✓ Volunteer Credentialing (Background Check) ✓ Annual Review ✓ Flu Shot ✓ Minimum 6 hours participation per year ✓ Annual Evaluation (Committee)</td>
<td>✓ Volunteer Orientation ✓ PFEA Orientation ✓ Speaker Training (Optional) ✓ Committee Training</td>
<td>Volunteer Benefits Parking Passes OSUMC Email Mentor new PFEAs Special Assignments</td>
<td>Above Plus: - Trained for Committees - Mentor for new PFEAs - More engaged and deeper knowledge of OSUWMC processes</td>
</tr>
<tr>
<td>LEVEL 4 PFEA-CS</td>
<td>- Research Design Team member</td>
<td>✓ Volunteer Credentialing (Background Check) ✓ Annual Review ✓ Flu Shot ✓ Commitment to Research Design team (varies)</td>
<td>✓ Volunteer Orientation ✓ PFEA Orientation ✓ Community Scientist Academy Training</td>
<td>Volunteer Benefits Parking Passes OSUMC Email Research Member</td>
<td>- More engaged and deeper knowledge of OSUWMC processes - Trained for Research Teams</td>
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Planning Orientation and Training

Connect with Volunteer Services

PFEA Orientation

- Overview of organization
- Include stories/examples of PFEA impact on patient experience
- Clearly define role of advisor
- How to share perspective and managing conflict
- Additional prep for specific PFEA roles
- Review materials on www.ipfcc.org website
Impact

- Increased familiarity with PFEA role
- Set boundaries
- PFEAs are more confident speaking up
- Comfortable in independent settings  
  - Committees where staff liaison is not present
- Several PFEAs ready to participate
- PFEAs have increased awareness of opportunity types
Thank You

wexnermedical.osu.edu
New York State Partnership for Patients (NYSPFP) HIIN

Carolyn Kazdan, MHSA, NHA
Assistant Director, Health Care Quality Improvement, IPRO

Aashna Taneja, M.S.
Project Manager
Healthcare Association Of New York State
NY HIIN Patient and Family Advisors
Orientation

• Why was this an important tool to develop?
  – Reduces provider burden
  – Addresses sensitive topics from a global perspective
  – Fills a gap by providing content advisors told us would have enhanced their orientation and better equipped them to be productive advisors
NYSPFP eLearning

The New York State Partnership for Patients (NYSPFP) is pleased to offer a variety of online learning modules as a dynamic and flexible approach to staff training and spread. NYSPFP's eLearning tutorials provide on-demand education on key topics that can be viewed by providers at their convenience. Hospitals can share these tools with staff by providing the links on their existing learning management systems and can supplement the eLearning by providing their own policies, protocols, or unique information. Certificates of completion are available on most programs.

How to Optimize the Learning
Courses vary in topic and time required, but are set up to be reviewed at your own pace when your busy schedule allows. You can start a module and revisit where you left off or re-review sections at your convenience.

Course Enrollment and Instructions Guide

Continuing Education Credits
Continuing education credits are available for some of our modules.

See the list of our current offerings below, and check back as NYSPFP adds more on-demand learnings in the areas of CLABSI, falls, pressure injuries, patient and family advisory councils (PFAC), and healthcare disparities.

For questions about the eLearnings, please contact your NYSPFP Project Manager. For technical questions, please contact education support at 518-431-7667 or learning@anys.org.

CAUTION
- Preventing CAUTI: The Role of the Bedside Clinician in Implementing Bundles
  (15-30 minutes, depending on chosen track)

CLABSI
- Preventing Central Line-Associated Bloodstream Infection (CLABSI)
  (30 minutes)

Health Care Disparities
- Race, Ethnicity and Language (REaL) Data Collection: How and Why We Ask
  (30-45 minutes)

Patient and Family Engagement
- Patient and Family Advisors Orientation Program
  (90 minutes)

Pressure Injuries
- Preventing Pressure Injuries
  (40 minutes)

Surgical Site Infections
- Enhancing OR Safety and Preventing Surgical Site Infections
  (Contains five learning modules that are 30 minutes)
On-Demand Training:
Patient and Family Advisors Orientation

https://www.nyspfp.org/eLearning.aspx

NYSPFP On-Demand Training

Patient and Family Advisors Orientation

The New York State Partnership for Patients (NYSPFP), in conjunction with your hospital, is pleased to offer the following E-learning educational program for patient and family advisors that focuses on importance of being an advisor and shares tips on being a successful member of the Patient and Family Advisory Council/Committee (PFAC).

The faculty for this eLearning program is Tom Workman, PhD, senior advisor for the Center for Medicare and Medicaid Services’ Patient and Family Engagement Contractor at the American Institutes for Research. Tom has worked with hospitals and hospital networks across the country to implement programs that enable patients and families to partner with hospitals at all levels of care. He is the author of several articles and book chapters on patient and family engagement in healthcare.

Research shows that when patients and families are engaged in their health care, it can lead to measurable improvements in safety and quality. In an effort to assist hospitals form stronger partnerships with patient and family advisors and orient the newly recruited advisors about their role, NYSPFP has developed this program that will highlight the following to help advisors get started for their first PFAC meeting:

- Role of a Patient and Family Advisor
- How Hospitals work
- Hospital Risks and Patient Safety
- Expectations that a hospital has from an Advisor
- What to Expect from a Hospital as an Advisor
- Tips on how to share your story
- 6 Tips of Being a Successful PFAC member
Two Advisors Share their PFAC Experience

Patient and Family Advisor Orientation
Becoming a Successful PFAC Member

let’s listen to some stories

Frank McDowell
Courtney Nataraj

Continue
What are two things that you think may be a challenge for you when participating on the PFAC, and what you might need to help you overcome them.

I know it may be difficult making a meeting due to never knowing if my/my family member’s condition may need attention that day. *It would be great if...*

I feel a little intimidated sharing my ideas with doctors and other highly educated people. *What would help me is...*
Simulated PFAC Meeting
Patient and Family Advisor Perspective (NYSPFP HIIN)

Brittany Guzinski, Patient Chair of NY Presbyterian Komansky PFAC
Q&A with the Panel
Moving Forward in Action
Engage With Us!

• Next PFE Affinity Group Pacing Event will take place on **Tuesday, September 24**\(^\text{th}\) from 2:00-3:00 p.m. ET.

Do you have a best-practice or a suggestion to accelerate PFE?

Please share them with us at PFE@air.org
Thank You!