Patient and Family Engagement Best Practices Series
Syllabus

EQIC
EASTERN US QUALITY
IMPROVEMENT COLLABORATIVE

PATIENT AND FAMILY
ENGAGEMENT
PFE

EQIC's two-part educational series on patient and family engagement focuses on the first three of the CMS five best practices. PFE, at the direct care level, is most effective when input is sought from patients and their families at pivotal points of a hospital stay. For planned admissions, one of these points is before the patient enters the hospital. Patients and their families have the capacity to create an easier admission when they understand what needs to be prepared in advance. Adopting the concept that "discharge begins at admission" reinforces that this is a key time to engage patients and families. Using a discharge planning checklist provides clear guidelines for the patient and clinical staff to ensure that all necessary education, questions and concerns are addressed before the patient is admitted.

The first recorded session in this series explores the importance and implementation of a planning checklist for patients with a scheduled admission and a discharge planning checklist for all patients.

The second portion of the series focuses on engaging the patient and family in bedside reports or shift change huddles. This setting provides an opportunity to share information between clinical staff, patients and families, and allows them to participate and actively engage in their care. This session is a live webinar that covers methods for effective bedside reports and shift change huddles and the barriers they present.

Calendar	Objectives	Tools and resources
PFE best practices 1 and 2: Preadmission and discharge planning checklists		
Recording available on EQIC website	**By the end of this session, participants will be able to:** • discuss the intent of PFE best practice 1: Implementation of a planning checklist for patients who have a planned admission; • discuss the intent of PFE best practice 2: Implementation of a discharge planning checklist; and • review and utilize examples to engage patients and their families prior to admission and initiate discharge planning upon admission.	**Tools and resources:** • NQF: Patient Passport Encourages Better Engagement with Providers • CMS QAPI Discharge Plan Brochure • AHRQ IDEAL Discharge Planning • AHRQ Write it Down – Join Your Team! Patient Note Sheet • IPRO Hospital Roadmap for Person and Family Engagement (PFE): Achieving the Five PFE Best Practices to Improve Patient Safety and Health Equity **Shared decision making:** • AHRQ: The SHARE Approach • AHRQ Strategy 6I: Shared Decisionmaking • MGH Health Decision Sciences Center: What is Shared Decision Making? • Ottawa Hospital Research Institute: Decision coaching using the Ottawa Personal Decision Guide **Teach-back:** • AHRQ: A Patient's Guide to Teach-Back • AHRQ Implementation Quick Start Guide: Teach-back

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Calendar	Objectives	Tools and resources
PFE best practice 3: Shift change huddles and bedside reporting		
Wednesday, Oct. 26 **Noon - 1 p.m.**	**By the end of this session, participants will be able to:** • discuss the intent of PFE best practice 3: Conducting shift change huddles and bedside reporting with patients and families; • explore methods for effective bedside shift reports and huddles; and • review examples and ideas to overcome communication barriers.	**Tools and resources:** • AHRQ Strategy 3: Nurse Bedside Shift Report • AHRQ Nurse Bedside Shift Report Implementation Handbook • NIH Bedside shift reports: What does the evidence say? • University of St. Augustine for Health Sciences: Bedside Shift Report: A Way to Improve Patient and Family Satisfaction with Nursing Care • Planetree: Bedside Shift Report Quality Checking Tool