| **Complete?**  **✓** | **Opportunities To Engage Patients and Family** | **Party Responsible** | **Notes** |
| --- | --- | --- | --- |
|  | Assign a leader to oversee the facility’s efforts to evaluate and improve patient engagement practices. The leader will be responsible for leading the development of an action plan. |  |  |
|  | Use a self-assessment tool to evaluate current performance and determine patient preferences for their care. |  |  |
|  | Educate all staff, physicians, and patients and families about patient- and family-centered care. |  |  |
|  | Evaluate the ways you currently listen to patients and families (focus groups, patient surveys, etc.). Identify ways to increase the number of opportunities to solicit input. |  |  |
|  | Conduct “safety” care conferences and individual meetings with patients and family members to specifically focus on surgical safety concerns and share the facility’s efforts to improve safety. |  |  |
|  | Communicate to patients and family during preoperative visits that safety is a priority. |  |  |
|  | Provide opportunities to educate patients and family members concerning the surgical safety programs. |  |  |
|  | Invite patients and families to present at staff orientations and in-service programs. Examples of presentation topics can include patient stories involving safety issues, examples of how patients and families want to be engaged in surgical safety work, and the patient and family perspectives concerning the ambulatory surgery center’s safety efforts. |  |  |
|  | Explore the facility through the eyes of patients and their families by doing a “walk-about” with patients and families. Focus on safety efforts, behaviors, and skills. |  |  |
|  | Include patients and family members on the teams that are developing patient education. Ask patients to help define what successful patient/family engagement will look like. |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Complete?**  **✓** | **Opportunities To Engage Patients and Family** | **Party Responsible** | **Notes** |
|  | Establish patient and family adviser roles and councils. |  |  |
|  | Provide surgical safety reports during patient council meetings. |  |  |
|  | Involve patient advisers in learning from defects discussions. |  |  |
|  | Develop a method to track patient input and provide feedback on status of response to needs, concerns, or opportunities for improvement. Ask about and listen to their needs and concerns, especially related to safety. |  |  |
|  | Include patients/family in team celebrations. |  |  |
|  | Post stories of patient/family engagement in facility newsletter and provide opportunities for patients or family members to share their success stories with management and other teams. |  |  |
|  | Include patient advisers in safety rounds. |  |  |

Purpose: To provide leaders and staff a checklist to help plan, implement, and evaluate patient and family engagement in safety projects in ambulatory surgery environments.

Who should use this tool? Leaders (ambulatory surgery center administrator, director of nursing, medical director, etc.) and any staff who provide care or services can use this tool to guide their efforts to engage patients and family members.

**How should you use this tool?** Review each task to plan, implement, and enhance patient engagement efforts. Add to this list any activities already underway to support engagement of patients and family in safety efforts in your facility.

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AHRQ Safety Program for Ambulatory Surgery

Patient and Family Engagement in the Surgical Environment Senior Leader Checklist 2 RQ Safety Program for Ambulatory Surgery Senior Leader Checklist 2