

Self-Directed Patient Experience Site Assessment Activity

ACTIVITY INSTRUCTIONS AND WORKSHEET

About This Guide

Thus far in the course we've spent time assessing Clinic XYZ123, a fictitious clinic that we use for instructional purposes only. You've learned a lot about the clinical program and how patients feel about it. In the Self-Directed Patient Experience Site Assessment Activity, you have an opportunity to take a closer look at your own clinical program.

There are a set of activities for each treatment modality. Select the treatment modality that applies to you. If you are responsible for more than one treatment modality, select the link that interests you the most.

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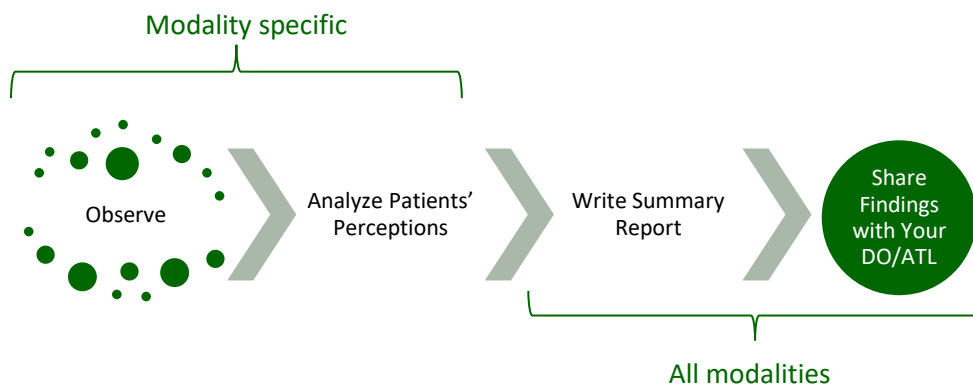
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Activity for Clinical Leaders

During this activity, you will:

- Observe your program as the patients see it.
- Analyze what patients are telling us about your clinical program.
- Summarize your findings and tell a “compelling story” to your manager about what is working well and what needs attention.

Follow these steps to complete the assignment.



Step	Activity Description
1. Observe	<p>What first or lasting impressions might a patient have about your clinical program? As we mentioned in earlier training, CMS created a Patient Checklist for a patient and his/her family to complete while touring a dialysis facility. We have adapted this checklist and ask that you use it as you walk through the patient’s entrance to your dialysis center and then walk through each area as if you were seeing it for the first time.</p> <p>Complete each item on the checklist and make notes as appropriate. Summarize your observations and recommendations for remediation.</p>
2. Analyze Patients’ Perceptions	<p>Locate the most recent ICH CAHPS survey results for your program.</p> <p>Analyze the report:</p>

	<ul style="list-style-type: none"> ● Review the composite graphics at the top of the page to determine how your performance compares to your Region, your Operating Group, and all clinics. ● View the response rate and decide if the number of responses were adequate. Remember, a minimum of 30 responses over the course of the Spring and Fall surveys each year is required for QIP and Five Star ratings. ● Compare the prior and current measures and determine if they show improvement or need attention. ● Make note of any numbers that are displayed in green or red.
Optional:	Schedule a meeting with your staff to share your findings. Ask a participant of this meeting to take careful notes. Engage your team to help you decide how to celebrate the wins and how to address the areas of improvement.
3. Write a Summary Report	<p>Complete each item on the checklist and make notes as appropriate. Summarize your observations and recommendations for remediation.</p> <p>Note: We recommend sharing the summary with staff or even keeping it in a central location to allow staff to see the progress made thus far.</p>
4. Share Findings with Your manager	<p>Schedule a 15-minute meeting with your manager to:</p> <ul style="list-style-type: none"> ● Share your findings and recommendations. ● Graciously accept feedback and/or guidance. ● Collaborate to identify next steps (i.e., report findings in QAI, schedule training to address key areas of concern, assign team members to present patient drivers in team meetings, etc.).

Step One: Observe Your Clinical Program

As we mentioned in earlier training, CMS created a Patient Checklist for a patient to complete while touring a dialysis facility. For this activity we would like you to view your clinical program the way that the patient might see it for the first time during a tour.

Below, we have reproduced some of the questions from the checklist and added others that are appropriate for your treatment modality.

Tip: Sometimes when you observe a familiar room, you miss things that are always there because your eyes/mind skip over them. One great technique to see a room as a new person would is to take a photo of it. When you observe the photo, you'll see things that your naked eye could filter out. **Note:** To protect patient privacy, use care when taking photos with patients in the vicinity.

Topics	Your Observations and Comments
How easy is parking at the center? Do you have to pay for parking?	
How far do you have to walk from the drop-off area to the front door?	
Is the center handicapped accessible?	
Is the center clean and welcoming?	
Are there current patient education materials in the dialysis center's lobby?	
Does the staff seem friendly, caring, and respectful of patients?	
How is the temperature in the treatment room? Is it too warm or too cold?	
Were you given the opportunity to talk to patients?	
What hours is the center open? Does that change during the holidays?	

What kind of security does the center have?	
Is the visitor policy posted?	
Is Wi-Fi or a TV available in the lobby?	
Is a policy for eating in the office posted?	
How many nurses work on each shift? How many patients does each nurse take care of at a time?	
How many technicians work on each shift? How many patients does each technician take care of at a time?	
Who do you talk to if you are concern about my care?	
Who should you call to find out if this center has closed due to bad weather?	
Who do you call if you need help when the center is closed?	
How can the center help if you have a medical emergency?	
Who can help if you encounter transportation problems to or from the center?	
What kind of education do you offer me and my family?	

Step Two: Analyze Patients' Perceptions

During this activity, you will locate the most recent ICH CAHPS survey results for your clinical program.

Insert path to the report here.

Complete the following questions as you analyze your clinical program's summary report.

Note: In previous activities we asked you to focus on the Center Staff categories. In this activity we want you to focus on all areas that you think require attention and follow-up.

Percentage of Surveys Returned

- What percentage of patients returned completed surveys?
- Is further action needed? Yes or No
- If yes, what do you propose?

Global Comparison Category

Rate Doctors

- What is the composite clinical measure for this category?
- Is further action needed? Yes or No
- If yes, what do you propose?

Rate Center Staff

- What is the composite clinical measure for this category?
- Is further action needed? Yes or No
- If yes, what do you propose?

Composite Comparison Scores

Doctors' Caring and Communication

- What is the composite clinical measure for this category?
- Is additional research/analysis required? Yes or No
- Review and analyze the scores in this section.
 - Your impressions of high-performing scores, if any:
 - Your impressions of low-performing scores, if any:

- Did the results of any question surprise you? Please explain:

Quality of Center Caring and Operations

- What is the composite clinical measure for this category?
- Is additional research/analysis required? Yes or No
- Review and analyze the scores in this section.
 - Your impressions of high-performing scores, if any:
 - Your impressions of low-performing scores, if any:
 - Did the results of any question surprise you? Please explain:

Providing Information to Patients

- What is the composite clinical measure for this category?
- Is additional research/analysis required? Yes or No
- Review and analyze the scores in this section.
 - Your impressions of high-performing scores, if any:
 - Your impressions of low-performing scores, if any:
 - Did the results of any question surprise you? Please explain:

Optional: Collaborate with Staff to Celebrate Wins and Address Gaps

Instructions: Schedule a meeting with your staff to share your findings (i.e., observations, wins, and areas of improvement). Facilitate a discussion to:

- Celebrate wins and behaviors that might have positively impacted the patient experience.
 - Discuss how other staff members can adopt these behaviors.
 - Identify anything that negatively impacted the patient experience.
 - Identify ways to ensure a positive experience moving forward.

Hint: Making several improvements at the same time might be overwhelming for you and your staff. We encourage you to:

- Start small and focus on one or two lower performing measures per week or month.
- Carefully track progress and refine plans as needed.
- Celebrate achievements as they occur.

Step Three: Write Your Summary Report

Prepare a two-page summary of what you learned about your clinical program, including what went well and what could be improved.

Note: Go to [Appendix A](#) for tips and best practices to keep in mind as you prepare for and write your Patient Experience Site Assessment Summary Report.

Following is the recommended content for your report.

Report Topics

- Background (no more than one paragraph)
- Summary of Findings
- Highlights of Wins
- Highlights of High-Attention Areas
- Conclusions
- Action Plans and Recommendations (focus on the top five priorities)

Summarize Your Observations and Findings

Accomplishments

- In your opinion, what is working well?
- What are your top five achievements?
- What, if anything, surprised you? Please explain:
- In your opinion, how can you and your staff celebrate these achievements?

Areas of Further Improvement

- In your opinion, what is not working as well as expected?
- The bottom five scores that I will focus on are:

For these improvements...	...I propose the following:

- What, if anything, surprised you? Please explain:

- Describe any additional support you might need from either senior management or other colleagues (i.e., manager, Preceptor, Education team, Social Worker, etc.).

Best Practices for Informing Your Staff of Findings

- Inform your staff of the wins.
- Start small and focus on one or two lower performing measures per week or month.
- Carefully track progress and refine plans as needed.
- Celebrate achievements as they occur.

Step Four: Schedule a Meeting with Your manager

Instructions: Schedule a meeting with your MANAGER.

The meeting is:

Date:

Time:

(in my time zone)

Attach the DO Patient Experience Manager Guide to your calendar invitation.

Appendix A: Write a Compelling Story

The numbers are not your story—your strategies and action plans, based on and supported by the numbers, are your REAL story.

This section provides best practices to help you write your Patient Experience Site Assessment Summary Report and prepare to present it to your manager.

The summary report should be clear, concise, and present the main points in a formal tone, and it should include the following components:

- An explanation of why the analysis was performed.
- The results that the analysis yielded.
- Proposed suggestions for how to best alter strategies based on the findings of your analysis. For example:
 - Staff meetings focused on patient drivers
 - Enlisting staff as thought partners to reinforce behaviors that support the patient drivers, attending training sessions,
 - Exploring the Experience Hub to find activities and/or motivation posters

Keep Your Audience in Mind

To make your story more compelling, write the summary report with the audience in mind. Before you begin writing, consider the following critical questions:

- What information does your manager need to decide? What does he/she already know?
- What is your objective and the essential information you want to highlight?
 - Let your objectives determine the content and context of your summary report.
- Do you have specific information you want to highlight with your message or story?
- What are you recommending?
 - Draw conclusions and make recommendations to the reader.
 - If your report presents the need for change, clearly recommend the actions or the solutions that you and your team will provide.
- What specific questions do you think he/she may have? List the questions and consider how you might respond to them.

As you write, consider how to shape the message, organize the sections of your summary, and present research to stand out in a brief space.

Organize Your Messages

Determine the specific goals or messages you want to convey to your manager based on your numbers, your audience, and his/her specific interests. Messages might include:

- What is working well.
- What is not working as well as expected and how you propose to improve or correct the situation.
- Any additional support you might need from either senior management or other colleagues.

Address Numbers That Are Off Target

The numbers are not your story—your strategies and action plans, based on and supported by the numbers, are your real story. If your numbers are off target, then:

- Explain why.
- Take responsibility for them.
- Describe your plan to improve them.

Your goal is to:

- Create a positive tone by outlining your plans to improve or correct the situation.
- Highlight what is working well.
- Expect a lot of questions driven by peoples' desire for understanding, not to criticize.
- Enlist any support you might need from either senior management or other colleagues.

Prepare Your Presentation

To make your presentation more powerful be sure to:

- Include empowering, positive language.
- Focus on both your areas for improvement as well as what is going right.
- Keep your summary concise—you are likely to have more information available to you than you need.
- Work collaboratively with other CM/PMs from your region or this class to prepare talking points, etc.
- Practice (and revise as needed).
- Anticipate questions and prepare answers ahead of time.