**PARTNERING WITH PATIENTS AND FAMILIES:**

**AN AMBULATORY PRACTICE SELF-ASSESSMENT**

This assessment can be completed by the clinic transformation team or other group which includes administrative and clinical leaders, managers, frontline staff, and patient and family advisors. The group can then discuss responses and develop an action plan.

|  |  |  |
| --- | --- | --- |
| YES | NO | PRIORITY FOR CHANGE LOW HIGH |
| **Leadership Commitment** | | |
| Does your practice/clinic have patient- and family-centered   1 2 3  vision, mission, and philosophy of care statements that promote partnerships with patients and families? | | |
| Does your practice/clinic communicate its patient- and family-centered vision, mission, and philosophy of  care clearly to: | | |
|  Clinic/practice staff and clinicians?   1 2 3 | | |
|  Patients and families?   1 2 3 | | |
|  Others in the community?   1 2 3 | | |
| Do practice/clinic leaders:   Create the expectation for partnering with patient and   1 2 3 | | |
| ambulatory redesign?   Through their words and actions, hold the following accountable for collaborating with patients | | |
| and families:  Staff?   1 2 3 | | |
| Clinicians?   1 2 3 | | |

family advisors in clinic/practice improvement and

Does your practice/clinic budget time, financial and

personnel resources in patient- and family-centered initiatives [e.g., review patient education materials, improve facilities, quality improvement teams?]

Does your practice/clinic have a Patient and Family

Advisory Council?

  1 2 3

  1 2 3

Do patients and families serve on committees and work groups involved in:

 Patient/family education?   1 2 3

 Care of chronic conditions (e.g., self- management support)?

  1 2 3

 Planning the use of group visits?   1 2 3

 Transition planning?   1 2 3

 Peer-led education and support?   1 2 3

 Medical Home implementation/ambulatory care redesign?

  1 2 3

 Quality improvement?   1 2 3

 Patient safety?   1 2 3

 Use of information technology?   1 2 3

 Oversight of culturally and linguistically appropriate services?

  1 2 3

 Connections with community services and programs?   1 2 3

 Staff orientation and education?   1 2 3

 Policy and procedure development?   1 2 3

 Facility design?   1 2 3

 Evaluation and research initiatives?   1 2 3

 Other? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Signage and Facility Design**

The signage and design of clinic/practice facilities:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  Creates positive and welcoming impressions |  |  | 1 | 2 | 3 |
| throughout the facility for patients and families?   Displays messages that communicate to patients |  |  | 1 | 2 | 3 |

and families that they are essential members of the

health care team?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Patient and Family Participation in Care and**  **Decision-making** |  | | | | |
| Do staff or clinicians encourage patients to define their |  |  | 1 | 2 | 3 |
| family or other care partners who will be involved in care and |  |  |  |  |  |
| decision-making? |  |  |  |  |  |
| Are patients and their families, according to patient |  |  | 1 | 2 | 3 |
| preference, encouraged and supported to participate in their |  |  |  |  |  |
| care planning and decision-making? |  |  |  |  |  |
| Do staff and clinicians view patients and families as essential |  |  | 1 | 2 | 3 |
| members of the health care team? |  |  |  |  |  |
| Are the cultural and spiritual practices of patients and |  |  | 1 | 2 | 3 |
| families respected and incorporated into care planning and |  |  |  |  |  |
| decision-making? |  |  |  |  |  |
| Do providers encourage and support patients and |  |  | 1 | 2 | 3 |
| their families, according to patient preference, to set |  |  |  |  |  |
| goals and create action plans for self-management of |  |  |  |  |  |
| chronic conditions? |  |  |  |  |  |
| Are staff practices consistent with the view that patients and |  |  | 1 | 2 | 3 |
| families are allies for patient health, safety, and well-being? |  |  |  |  |  |
| **Patient and Family Access to Information, Education, and Support** |  |  |  |  |  |
| Are systems in place to ensure that patients and their families |  |  | 1 | 2 | 3 |
| have access to complete, unbiased, and useful information. |  |  |  |  |  |
| Are there a range of informational and educational programs |  |  |  |  |  |
| and materials provided: |  |  |  |  |  |
|  In primary languages of the community served? |  |  | 1 | 2 | 3 |
|  At appropriate literacy levels? |  |  | 1 | 2 | 3 |
|  That include examples and images that reflect the |  |  | 1 | 2 | 3 |
| diversity of patients and families served by the  practice/clinic? |  |  |  |  |  |
|  In a variety of formats (e.g., written,  | |  | 1 | 2 | 3 |
| video, web-based)? |  |  |  |  |  |

YES NO

PRIORITY FOR CHANGE LOW HIGH

Do patients have easy access to their medical records [paper or electronic]?

  1 2 3

 Do patients have access to their clinical notes?   1 2 3

Are peer-led educational programs available and accessible to patients and families?

**Education of Staff, Clinicians, Students, and Trainees**

Do clinic/practice orientation and education programs prepare the following people for collaboration with patients and families in care and decision-making:

  1 2 3

 Staff?   1 2 3

 Clinicians?   1 2 3

 Students and Trainees?   1 2 3

Are patients and families involved as presenters in orientation and educational programs?

  1 2 3

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