

Level 1 Planning Worksheet: Verbal and Written Feedback at Point of Care

Brief Description:

Level 1 Patient Engagement involves gathering information verbally at the point of care, while patients are in the clinic. This involves engaging the patient or parent with lived experience in responding to structured or semi-structured questions posed verbally by a member of the clinic staff.

The advantage of point-of-care feedback is that it engages patients in the moment, as they are experiencing care, when thoughts and opinions are fresh. It takes advantage of the context to gather information that is relevant to the setting and the care. It also allows the patient to add detail to the response and share ideas. Level 1 engagement does not rely on the patient's ability to read or write.

External Best Practices/Examples/Exemplars:

Staff at a Northern California FQHC sought to gather patient input on offering more opportunities for virtual visits for primary care rechecks. They used two methods to gather information. The first involved having a patient navigator interview patients in a private location while they awaited laboratory interventions. In the second, they had a patient navigator interview patients following a PCP visit using a semi-structured interview questionnaire. They chose the navigator because they were a trusted individual who spoke the patient's preferred language. They made a point of interviewing people from all age groups.

Suggested Action Steps:

- Assess our team's willingness to ask for and incorporate the input in a meaningful way.
- Identify what process we want feedback on. What are we testing in the clinic flow or pre-visit planning that would benefit from patient feedback?
- What specific information/input is needed?
 - Develop a first draft feedback tool.
- Identify how to gather the feedback.
- Determine the process for how you will collect the feedback.
 - Develop a first PDSA cycle and begin testing with a small set of patients over the next several weeks.
- How will we use the information gathered?
- Consider how we can be open and ready to receive feedback.

Considerations as we select a process for feedback and develop a process:

- What is our patient mix and how do we make sure to engage with individuals who align with the process we have selected?
- How do we create a safe environment for feedback?
- How can our team prepare for feedback? Who can help us assimilate the feedback in a meaningful way?
- If written feedback, how do we word questions to elicit a response?
- If verbal feedback, what background does the interviewer have?
 - Can we ask in languages spoken by the patient?

Equity Considerations:

- Find guidance for equity in your Population of Focus' Implementation Guide. Consider the strategies in the PoF Equity section to inform the QI/PHM process to be validated.
- Review [Analyzing Inequities and Developing SMARTIE Goals for Your Population of Focus Dec '24 Webinar](#).
- Consider REAL and SOGI data to inform patient feedback/tailor the questions you want feedback on.
 - Consider creating a SMARTIE goal for this piece of work that specifically includes equity: [SMARTIE Aim Statement Worksheet](#)

Additional Considerations:

- Are there cultural/political issues that may influence verbal and written feedback at point of care?