

## **Observation Protocol**

July 1, 2010

### **ONE FORM FOR EACH PATIENT-PROVIDER ENCOUNTER**

#### **Observation goals**

- The purpose of the observations is to observe practices and behaviors on the medical–surgical unit where the Guide has been implemented. We will use the information gathered during the observations **to better describe changes in the patient-provider interaction** and to supplement and inform other data collected about the hospital's experiences implementing the Guide strategies. Specifically, we will use the observations to help us develop follow-up questions to ask health professionals and hospital leaders about their experiences before and after implementation of the Guide. During the post-implementation period, we also will use the observations to inform follow-up questions about how easy or difficult the Guide interventions have been to implement and sustain.

#### **Research design**

- We will conduct two observations at each of the three hospitals during the **pre- and post-**implementation periods, for a total of 12 observations. Each observation will last for 4 hours, during which time two AIR staff members will observe select hospital staff. Observers will complete an observation form for each patient-provider encounter observed.

#### **Recruitment criteria**

- We will observe physicians and nurses who work on the hospital units where the Guide strategies have been implemented.

#### **Testing materials**

- Interviewer clock
- Multiple copies of observation form
- Pen/pencil
- Clipboard

## Strategy: Admission Communication Packet

Observer Name: \_\_\_\_\_

<b>Hospital Site Information:</b>	
Hospital Name: _____	
Date: _____	
Position of Person Observed: _____	
Unit/Department: _____	
Time Observed: Start: _____ End: _____ Total Time Elapsed: __ _____	
<b>Patient Information:</b>	
Awake (Y/N?): _____	
Family member present (Y/N, indicate relationship to patient): _____	

Did the provider...	Yes	No
Introduce themselves when first entering patient's room?		
Introduce any new staff that entered the patient's room?		
Welcome patient and family members as equal partners of the health care team?		
Encourage patient and family members to ask questions?		
Encourage patient and family members to participate in treatment decisions?		
Encourage patient and family members to volunteer information related to their care?		
Answer patient's and family members' questions in plain language?		
Use the "teach back" technique to make sure the patient and family members understood what was told to them?		
Help the patient and family member articulate their concerns if they are having trouble?		
Help the patient and family members get to the person who has the answers they need, if they don't have the answers?		
Wash their hands upon entering the room?		
Maintain eye contact when speaking to patient and family members?		
Keep a friendly rapport with patient and family members?		



## Strategy: Bedside Change of Shift

Observer Name: \_\_\_\_\_

<b>Hospital Site Information:</b>	
Hospital Name: _____	
Date: _____	
Position of Person(s) Observed: <i>Current Shift:</i> _____ <i>New Shift:</i> _____	
Unit/Department: _____	
Time Observed: <i>Start:</i> _____ <i>End:</i> _____ <i>Total Time Elapsed:</i> _____	
<b>Patient Information:</b>	
Awake (Y/N?): _____ Family member present (Y/N, indicate who): _____	

Did the provider(s)...	Yes	No
Conduct change of shift at the patient's bedside?		
Introduce themselves when first entering patient's room?		
Introduce oncoming nurse?		
Conduct a verbal report of the patient's current status?		
Review outstanding test or lab results?		
Ask the patient about their daily goals?		
Wash their hands upon entering the room?		
Maintain eye contact when speaking to patient and family members?		
Keep a friendly rapport with patient and family members?		

Additional Comments/Questions for Follow-Up: \_\_\_\_\_

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## Strategy: Discharge

Observer Name: \_\_\_\_\_

<b>Hospital Site Information:</b>	
Hospital Name: _____	
Date: _____	
Position of Person Observed: _____	
Unit/Department: _____	
Time Observed: <i>Start:</i> _____ <i>End:</i> _____ <i>Total Time Elapsed:</i> _____	
<b>Patient Information:</b>	
Awake (Y/N?): _____ Family member present (Y/N, indicate who): _____	

<b>Did the provider...</b>	<b>Yes</b>	<b>No</b>
Involve patients and family members in the discharge process?		
Go over the names and numbers of providers to contact after discharge?		
Go over the list of discharge medications?		
Go over outstanding tests or procedures with patients and family members?		
Go over wound care with patients and family members?		
Go over problem signs with patient and family members and who to call if there are problems?		
Go over dietary restrictions?		
Go over activity restrictions?		
Offer to make follow up appointments for patient?		
Handout the discharge checklist/plan to patients and families?		
Help patients and families complete the checklist/plan?		

Additional Comments/Questions for Follow-Up: \_\_\_\_\_  
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