



## Appendix 9

### Checklist of actions to ensure meaningful Patient Engagement at the individual health and healthcare level

Complete the checklist, identify the gaps and create an action plan for improvement.

Actions and questions to ensure meaningful patient engagement within a specific clinical care encounter:	Yes	No	Some	N/A
<b>In all interactions with patients Communication is key. (see also communication checklist appendix 6)</b>				
Do you use plain language to communicate health related information?				
Are you aware of your body language and eye contact during all your patient interactions?				
Do you tailor your communication and education supports to meet the patient's needs?				
Do you use visual aids and/or interpreters for patients who cannot read or do not understand English?				
Have you asked the patient what communication method works best for them?				
Do you use active listening techniques to ensure the patient has been heard and understood? (see page 30 Section 1 of Roadmap)				
Have you reinforced and reiterated the information you are giving patients about their condition?				
Have you checked the patients understanding of the information you have given them e.g teach-back?				
<b>Involving patients in decisions made about their own health and healthcare</b>				
Have you identified the patient's needs, concerns, beliefs, expertise and preferences?				
Have you invited the patient to become involved in their own healthcare and have you outlined the benefits?				
Have you used a decision making aid with your patient? (see links to decision aids page 55 of Roadmap)				
<b>Supporting patients in the self-management of their own health</b>				
Have you asked about the patient's priorities for their health?				
Have you explored barriers to and enablers for self-management?				
Have you set goals that reflect the patient's priorities to improve their health?				
Have you incorporated the patients lived experience in goal setting?				
Have you tailored your advice to meet the needs of the patient?				
Have you signposted your patient to existing on-line information resources?				
Have you signposted the patient to existing supports within the HSE? e.g the Living Well programme.				
Have you provided guidance about navigating the healthcare system for your patient?				

Actions and questions to ensure meaningful patient engagement within a specific clinical care encounter:	Yes	No	Some	N/A
<b>Additional measures to assist patient involvement in their own healthcare.</b>				
Have you developed condition-specific patient reported outcome measures that reflect their goals?				
Do you have a system in place for collecting more personalised data about patient experience and outcomes? E.g in pre-assessment questionnaire				
Do you have training / tools for staff to support patient engagement regarding the patient's own healthcare? E.g documentation in charts regarding patient preferences etc				
<b>Including patients as part of the healthcare team</b>				
Do you have a process in place for inviting patients and carers to actively take part in bed-side rounds or OPD appointments?				
Do you have a patient centred discharge planning programme that involves the patient and their personal support network?				
Does your organisation have a policy that encourages patients and their personal support network to be full members of the healthcare team?				
Do you use technology to support enhanced communication with patients? e.g tele-health options				
Do you have health passports for patients?				
<b>Transparency and Accountability</b>				
Have you provided unbiased evidenced based information to the patient?				
Have you given all the information that the patient requires regarding treatment options to make an informed decision?				
Have you discussed how the care/intervention/treatment option will help meet the patients goals?				
Have you documented the information shared with the patient during the care encounter in their healthcare record?				
Does the patient have access to their own healthcare records? Can they contribute to or correct them?				
<b>Outside the specific care encounter</b>				
Is there a process in place to allow you to tailor the patients appointment time to suit them?				
When delivering bad news do you ensure you have time with the patient to answer their questions?				
Do you offer patients the opportunity for another appointment following bad news?				
Does your organisation support patients to navigate and interact with the wider health care system?				

Actions and questions to ensure meaningful patient engagement within a specific clinical care encounter:	Yes	No	Some	N/A
<b>You/ Your team's understanding of patient engagement</b>				
Do you and your team have an understanding of what patient engagement is and why it is important?				
Do you and your team have an understanding of how to select and conduct patient engagement activities?				
Have you conducted a needs analysis regarding capacity building for patient engagement for your team?				
Does your service/ hospital/CHO have access to training and education regarding patient engagement?				
Does your service/ hospital/CHO have access to training and education regarding patient engagement?				
Does your service/hospital/CHO/ manager support a culture of Patient Engagement?				