



AHA Team Training

Patient and Family Caregiver Engagement: The Key to Enhancing Teamwork and Communication

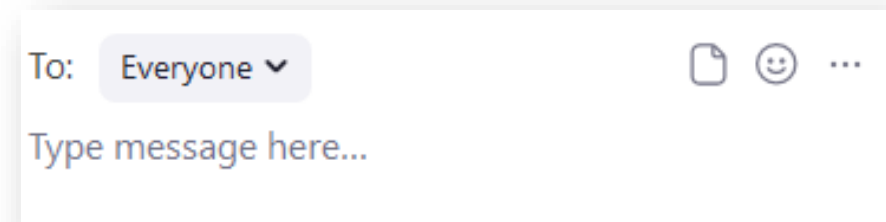
September 11, 2025



AHA CENTER FOR HEALTH
INNOVATION

Rules of Engagement

- Audio for the webinar can be accessed in two ways: 1) through your computer speakers or 2) dialing in by phone – *listen only mode*
- Q&A session will be held at the end of the presentation
 - Written questions are encouraged throughout the presentation
 - To submit a question, type it into the Chat Area and send it at any time
- Other notable Zoom features:
 - This session is being recorded, the chat will not be included in the recording
 - Utilize the chat throughout the webinar. To chat everyone, make sure your chat reflects the picture below:



Continuing Education Credit

To receive 1.0 CE credit hour for this webinar, you must:

- **Create a Duke OneLink account.** You only need to create an account once – you may use it for all future webinars. Instructions will be chatted in and/or you may find them in your registration confirmation email.
 - Step 1: Register for a OneLink account
 - Step 2: Activate your account and ***confirm your mobile number***
- Text **XXXXXX** to (919) 213-8033 after 1:00 pm ET today – 24-hour window

In support of improving patient care, the Duke University Health System Department of Clinical Education and Professional Development is accredited by the American Nurses Credentialing Center (ANCC), the Accreditation Council for Pharmacy Education (ACPE), and the Accreditation Council for Continuing Medical Education (ACCME), to provide continuing education for the health care team.



Today's Presenter



Sue Deaton

*Chief Engagement Officer, Patient Centered
Innovation, Inc.
Faculty, Institute for Healthcare Improvement*

Patient and Family Caregiver Engagement: ONE WORD

Use the chat box to
describe in
ONE WORD
what patient and family
caregiver engagement
means to you



Objectives



Learning Objective 1:
Describe the **key changes**
in TeamSTEPPS 3.0 that
addressed patient and
family caregiver
engagement.



Learning Objective 2:
Explain how patient and
family engagement can
support **patient safety**
efforts across a variety of
healthcare settings.



Learning Objective 3:
Identify opportunities to
involve patients and
families as **key partners**
in a variety of health care
settings.

PFE: Definitions

DIFFERENT SOURCES – SAME PRINCIPLE: TEAM MEMBER

IPFCC: Care grounded in mutually beneficial partnerships among patients, families, and healthcare practitioners.

<https://ipfcc.org/about/pfcc.html>

AHRQ: A partnership involving patients, family members, clinicians, and hospital staff to improve care quality and safety.

<https://www.ahrq.gov/patient-safety/patients-families/engagingfamilies/guide.html>

CMS: Emphasizes creating an environment where patients and families collaborate with providers to develop health goals based on evidence, values, and preferences.

<https://www.cms.gov/medicare/quality-initiatives-patient-assessment-instruments/qualityinitiativesgeninfo/downloads/person-and-family-engagement-strategy-summary.pdf>

PFE: Core Concepts

Dignity and
Respect

Information
Sharing

Participation

Collaboration

PFE – A Timeline

INSTITUTE OF MEDICINE

TO ERR IS HUMAN: BUILDING A SAFER HEALTH SYSTEM

Health care in the United States is not as safe as it should be. At least 44,000 people, and perhaps as many as 98,000, die in hospitals each year as a result of medical errors that could have been prevented, according to estimates from two major studies. At the lower estimate, preventable medical errors in hospitals exceed



Safer Together

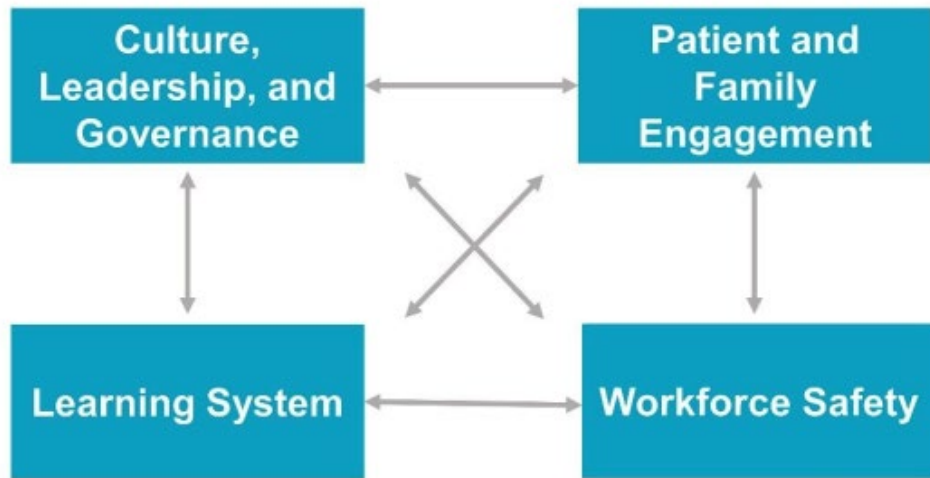
A National Action Plan to Advance Patient Safety

The Institute for Healthcare Improvement convened the [National Steering Committee for Patient Safety](#) as a collaboration among 27 national organizations committed to advancing patient safety.



How to Cite This Document: National Steering Committee for Patient Safety. *Safer Together: A National Action Plan to Advance Patient Safety*. Boston, Massachusetts: Institute for Healthcare Improvement; 2020. (Available at www.ihl.org/SafetyActionPlan)

National Action Plan: PFE Focus



Key Actions to Support PFE

- Co-design care delivery
- Establish engagement competencies for all healthcare team members.
- Involve patients in leadership and governance and safety efforts
- Ensure equitable engagement by making processes fair and accessible for all
- Promote trust and respect for patients, families, and care partners

National Steering Committee for Patient Safety. Safer Together: A National Action Plan to Advance Patient Safety. Boston, Massachusetts: Institute for Healthcare Improvement; 2020. (Available at www.ihl.org/SafetyActionPlan)

National Steering Committee for Patient Safety. Self-Assessment Tool: A National Action Plan to Advance Patient Safety. Boston: Institute for Healthcare Improvement; 2020. <http://www.ihl.org/SafetyActionPlan>





Objective 1

Describe the **key changes** in TeamSTEPPS 3.0 that addressed patient and family caregiver engagement.

Key Changes: TeamSTEPPS 3.0



- **Increased Patient Focus:** Patient participation examples, simulation training, and patient and family caregivers' guide
- **Integrated Platform:** Consolidated content across care settings
- **Modular Course Design:** Facilitates short training sessions
- **Active Learning Strategies:** Online group exercises and discussion formats
- **Leverages New Opportunities:** Technology changes (e.g. instant messaging, telemedicine) and well-being across the team



Key Changes: PFE



Agency for Healthcare
Research and Quality

Search all AHRQ sites



[Topics](#) ▾ [Programs](#) ▾ [Research](#) ▾ [Data & Analytics](#) ▾ [Tools](#) ▾ [Funding & Grants](#) ▾ [News](#) ▾ [About AHRQ](#) ▾

[Home](#) > [TeamSTEPPS Program](#) > [Welcome Guides](#) > [Patients & Family Caregivers](#)

SHARE: [f](#) [X](#) [✉](#) [📄](#) [+](#)

TeamSTEPPS Program

TeamSTEPPS Updates

Welcome Guides

Patients & Family Caregivers

Frontline Providers

Welcome Guide for Patients and Family Caregivers

Welcome to the TeamSTEPPS® 3.0 curriculum.

TeamSTEPPS (Team Strategies to Enhance Performance & Patient Safety) is a resource to equip members of healthcare teams to work effectively together to best meet the needs of patients and their family members, friends, or neighbors who care for them (hereafter referred to as "family caregivers" in this Guide).

While TeamSTEPPS tools were primarily created for healthcare workers, patients and family caregivers may find them useful as they advocate for themselves or their loved ones. While the training materials are written to train healthcare workers, some training content may be relevant to patients or their advocates

had with different



Key Changes: PFE Resources

Notes For The Patient/Family:

- **Why It Matters:** “As a patient or family caregiver, ***you directly see*** the impact of poor communication and ineffective team leadership on your safety, organizational efficiency, and staff morale, burnout, and turnover.”
- **How To Improve:** “Embrace new teamwork and communication strategies – ***the patient is a member of the team!***”
- **Act: *Resources*** are organized to help people responsible for implementing TeamSTEPPS 3.0 (or parts of it) in a unit or organization

PFE Changes in TeamSTEPPS 3.0

Use the chat box to describe which PFE resource you plan to use in your organization





Objective 2:

Explain how patient and family engagement can support **patient safety** efforts across a variety of healthcare settings.

TeamSTEPPS: Evidence Based Framework

TeamSTEPPS®
Team Strategies & Tools to Enhance Performance & Patient Safety



**Safe,
Efficient &
Patient-
Centered Care
Teams**

PFE and Patient Safety: Communication



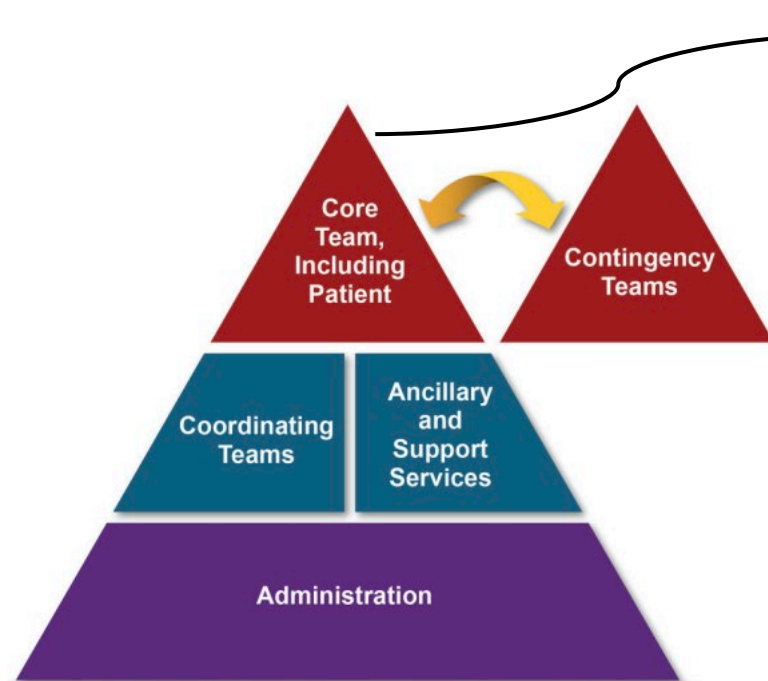
- Prevent errors
- Reduce misunderstandings
- Accurate diagnosis
- Effective treatment

- Active listening
- Clear and concise information
- Team meetings
- Empathy and rapport via nonverbal and verbal language

- Call-backs and check-backs (e.g., allergies and impact of treatments)
- Handoff (e.g., patient responsibility and new team members or unit)
- Teach-back (e.g., wound care or medications)



PFE and Patient Safety: Team Leadership



Effective Leaders:

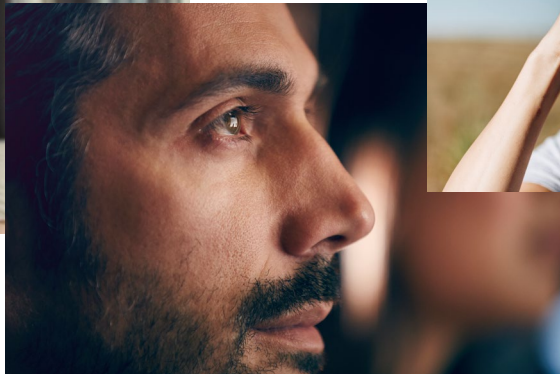
Maximize team performance
Ensure actions are understood
Share information
Confirms resources are available

- Setting clear goals (that include patient preferences)
- Assigning tasks appropriately (including patient responsibilities)
- Adapting to changes
- Creating a cohesive team – that includes the patient!

- **Brief:** At beginning of shift or procedure or discharge
- **Huddle:** When situation or assignments change
- **Debrief:** Bedside shift report or after procedure
INCLUDE THE PATIENT!

PFE and Patient Safety: Situation Monitoring

Active scanning (individual skill)
Awareness (individual outcome)
All-share (team shared mental model)



STEP

- Status of patient
- Team members (stress, workload)
- Environment (equipment, information)
- Progress toward goal (the patient's goals)

PFE and Patient Safety: Mutual Support



ANTICIPATE

SUPPORT

SEEK

ASSERT

BACKUP

OFFER

I am **C**ONCERNED!

I am **U**NCOMFORTABLE!

This is a **S**AFETY ISSUE!

“Stop the Line”

PFE and Safety

Use the chat box to describe **ONE NEW THING** you learned about PFE and Patient Safety





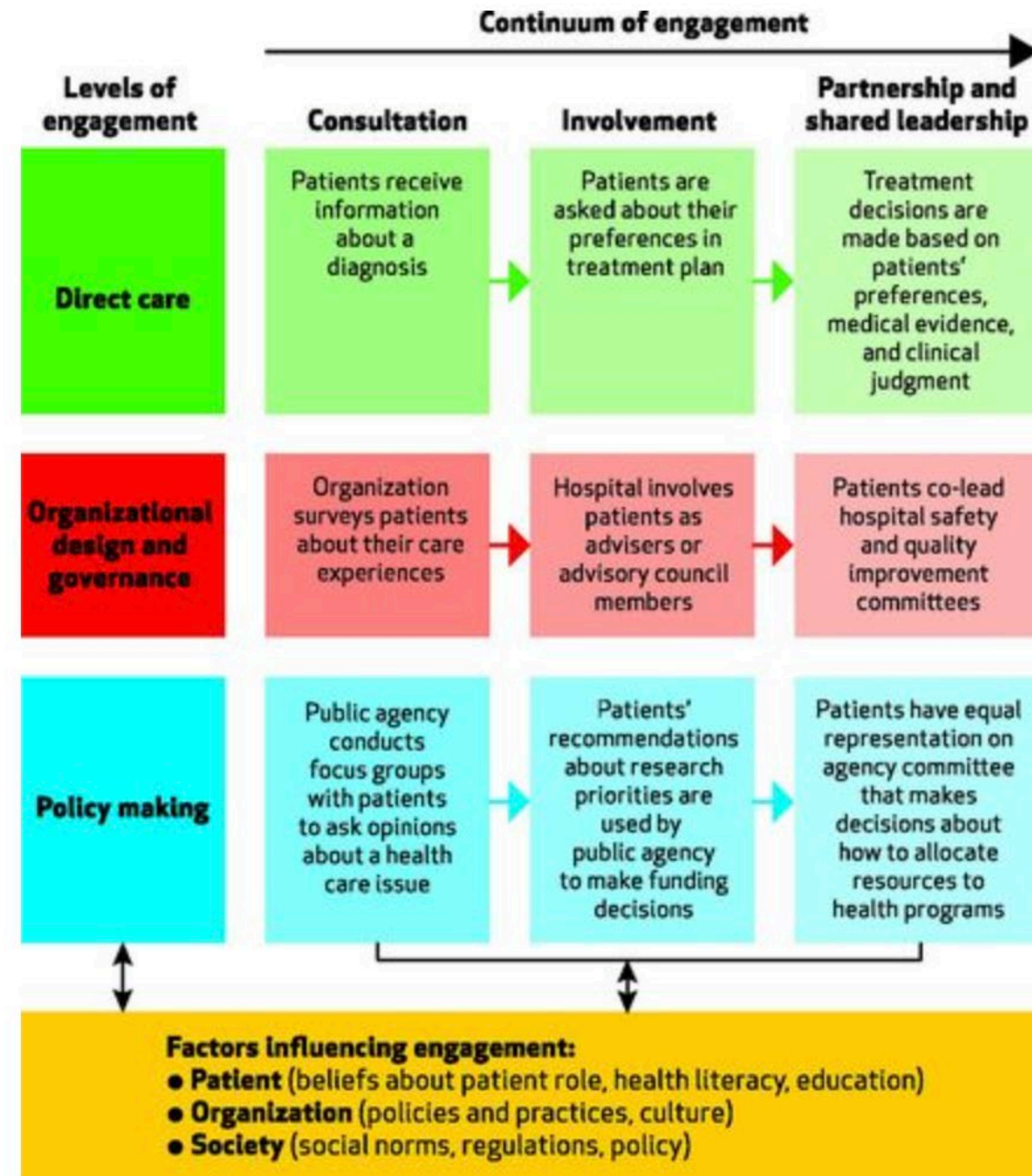
Objective 3

Identify opportunities to involve patients and families as **key partners** in a variety of health care settings.

PFE Framework

- *Engagement can occur at all levels of care*
- *Engagement occurs across a continuum*
- *Patients' readiness and beliefs impact how they engage*
- *Organizations can influence (positively and negatively) how patients engage*

Carman KL, Dardess P, Maurer M, Sofaer S, Adams K, Bechtel C, Sweeney J. Patient and family engagement: a framework for understanding the elements and developing interventions and policies. Health Aff (Millwood). 2013 Feb;32(2):223-31. doi: 10.1377/hlthaff.2012.1133. PMID: 23381514
<https://pubmed.ncbi.nlm.nih.gov/23381514/>



Patients and Families as Team Members



- Bedside Shift Report
- Shared Decision Making
- Teach Back
- Caregiver Support Programs
- Collaborative Goal Setting
- Patient Pathways (written with patients and family caregivers)
- Shared Medical Records and Open Notes

Patients and Families as Team Members



- Patients as Safety Team Members
- Patients Co-Lead Safety Teams
- Patients on Staff Education teams (e.g., TeamSTEPPS)
- Patients Present at TeamSTEPPS education sessions
- Patient Education on teamwork and communication
- Patient- and Family-Advisory Councils
- Patient Advisor on TeamSTEPPS committees
- Patient and/or Family advisors on Governance boards

PFE In Primary Care Practices



The Guide to Improving Patient Safety in Primary Care Settings by Engaging Patients and Families

Exemplar practices:

- OpenNotes
- Patient and Family Advisory Committee
- Team-Based Care
- Shared Decision-making

<https://www.ahrq.gov/patient-safety/reports/engage/interventions/index.html>

<https://www.ahrq.gov/patient-safety/reports/engage.html>

PFE: A Roadmap

A ROADMAP FOR

Patient + Family Engagement in Healthcare

Practice and Research

Practical strategies for advancing engagement in healthcare—starting today.

START



GORDON AND BETTY
MOORE
FOUNDATION

 **AIR**
AMERICAN INSTITUTES FOR RESEARCH



What You'll Find

Introduction

The Roadmap

Resources and
Further Information

Why a Roadmap?

Developing the
Roadmap

Who Is This
Roadmap For?

From What-ifs
to Action:

Using the Roadmap

Vision for Patient and Family
Engagement in Healthcare

8 Strategies for Change:

- Patient and Family Preparation
- Clinician and Leadership Preparation
- Care and System Redesign
- Organizational Partnership
- Measurement and Research
- Transparency and Accountability
- Legislation and Regulation
- Partnership in Public Policy

5 Simple Actions You Can Do Today

Join In:

Resources and Commitments

Societal Factors
Affecting Engagement

About the Framework
for Patient and Family Engagement

More About Creating
the Roadmap

- Process
- Participants

Carman KL, Dardess P, Maurer ME, Workman T, Ganachari D, Pathak-Sen E. A Roadmap for Patient and Family Engagement in Healthcare Practice and Research. (Prepared by the American Institutes for Research under a grant from the Gordon and Betty Moore Foundation, Dominick Frosch, Project Officer and Fellow; Susan Baade, Program Officer.) Gordon and Betty Moore Foundation: Palo Alto, CA; September 2014. www.patientfamilyengagement.org.



PFE: What Changes Can We Make?



Patients and Family Caregivers as Key Partners

Use the chat box:
Describe how **YOU**
will involve patients
and families as
key partners



Key Takeaways: Patient and Family Engagement



Takeaway 1

TeamSTEPPS® 3.0 offers refreshed training methods and resources designed to promote **patients and family caregivers as vital members** of the healthcare team.



Takeaway 2

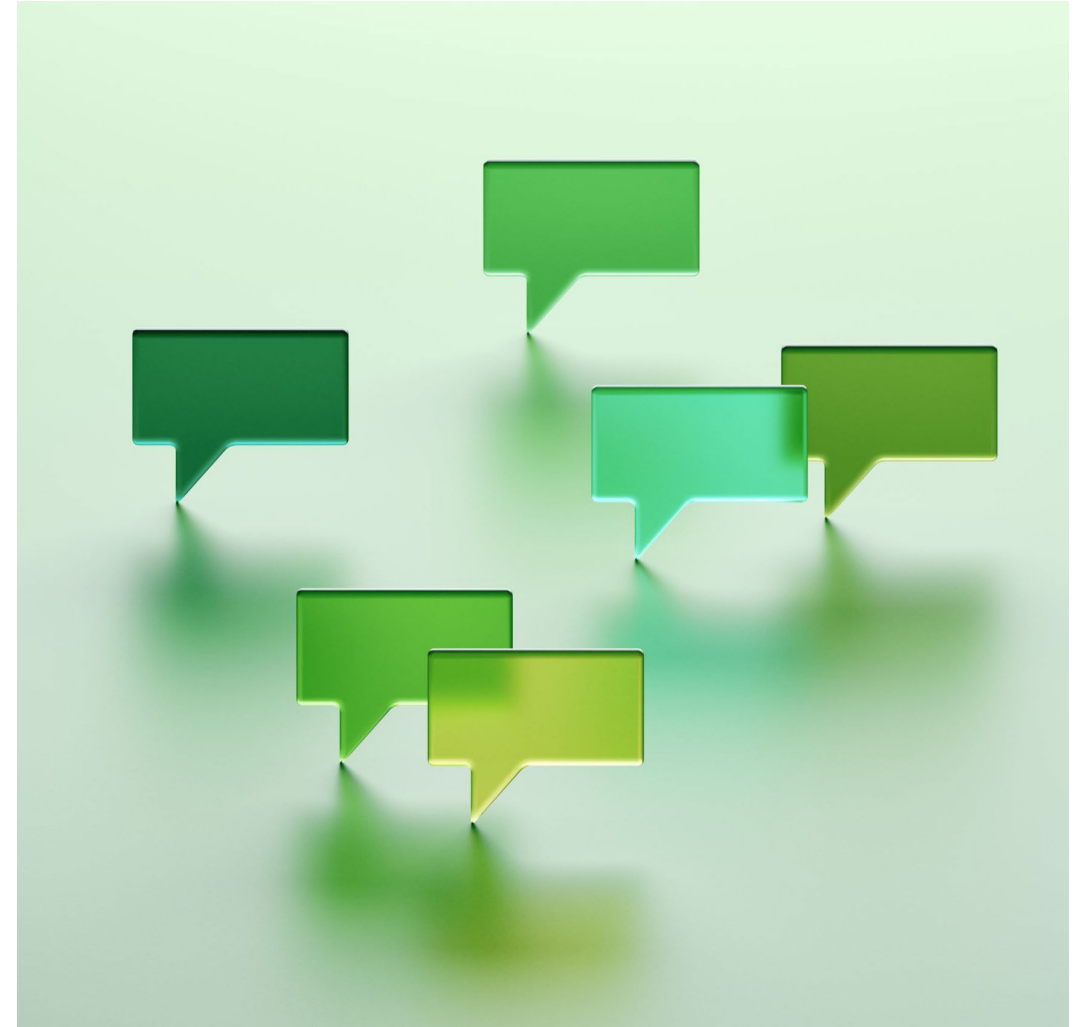
Patients and family caregiver engagement **strengthens teamwork and communications** in a variety of healthcare settings as the industry is confronted with numerous challenges and opportunities.



Takeaway 3

Actively partnering with patients supports patient safety, improves **communication**, and enhances **leadership** and **mutual support** among healthcare teams.

Questions and Answers



Final Reminders

- **Evaluation**

- Please complete the evaluation form that appears on your screen once the webinar ends

- **Continuing Education**

- Create a Duke OneLink account if you have not done so
 - Instructions can be downloaded from the Files pod or your registration confirmation email
- Text **XXXXXX** to (919) 213-8033 within 24 hours



Questions? Stay in Touch!

www.aha.org/teamtraining

Email: teamtraining@aha.org • Phone: (312) 422-2609