Institute *for* Healthcare Improvement

Age-Friendly Health Systems:

How to Introduce My Health Checklist to Staff

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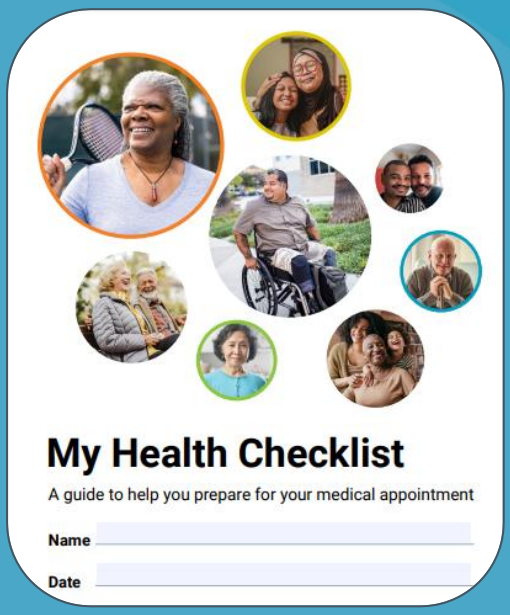
ihi.org/AgeFriendly



"How to Introduce My Health Checklist to Staff" supported by AARP.

My Health Checklist was created especially for:

Age-Friendly Health Systems

An initiative of The John A. Hartford Foundation and the Institute for Healthcare Improvement (IHI) in partnership with the American Hospital Association (AHA) and the Catholic Health Association of the United States (CHA).

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About My Health Checklist

My Health Checklist is designed to help older adults get the most out of their medical appointments. The checklist helps older adults think through all aspects of their health — what's going well, what could be better, and their questions or concerns. It then helps them prioritize their top questions about what matters most to them.

My Health Checklist supports age-friendly care — care that:

- Follows an essential set of evidence-based practices, known as the 4Ms (What Matters, Medication, Mentation, and Mobility);
- Causes no harm; and
- Aligns with What Matters to the older adult

For more information on common questions and why this is important, visit ihi.org/AgeFriendly and see the resource **"FAQs and Why This Matters."** Also see the resource, **"How to Introduce My Health Checklist to Older Adults."**

Steps to introduce the checklist

Get started

Start personally

Use My Health Checklist with an older adult you know (or yourself). Hear what it's like for that person and share the experience with other staff members. For example, you might invite a family member, friend, or neighbor to sit down together and complete the checklist. (Sutter)

Try it out professionally

If you work with older adults, try it out yourself with an older adult and their caregiver if applicable. For example, share with patients and their families if you see them as part of an inpatient geriatric consult team or an outpatient primary care team. (Erie County Medical)

Use your experience as an introduction

Sharing your firsthand experience with other staff members is a great way to introduce the checklist. Stories engage your audience by showing, rather than telling, what works.

Introduce the checklist to others

Format

Print: Will you print the checklist so that it can be folded in half as a compact booklet or print it so that each page uses an entire 8.5 x 11" sheet of paper? Can you print a hard copy on the unit floor computer? Can you print multiple copies to hand out at your organization or place an order elsewhere?

Tips for printing:

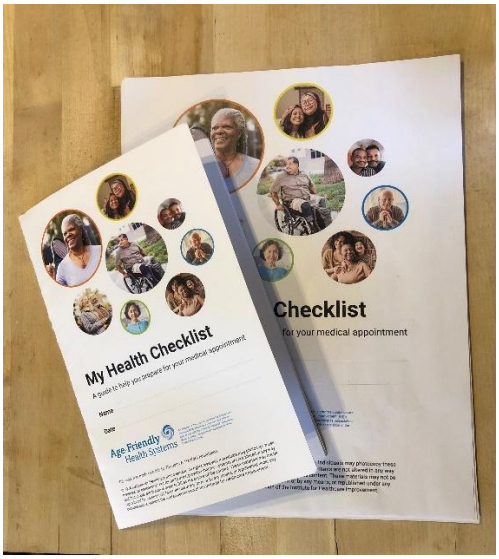
- Print on your own printer
    - For the checklist to be folded in half as a compact booklet: Print the PDF and then fold the pages in half
    - For each page to take up an entire 8.5" x 11" sheet of paper: On the print screen, click on "Fit" (Windows) or "Scale to Fit" (Mac) and the printed checklist will expand to fill the 8.5 x 11" page
- Print using your organization's in-house print shop or a local printer (e.g., FedEx, Staples). We recommend the following specifications to print as a compact booklet:
    - 5.5" x 8.5" saddle stitched
    - Full duplex
    - 100 lb card stock covers
    - 24 lb paper inside

Digital: If you will share the checklist online, who do you need to partner with (e.g., IT department)? Consider what language(s) will be used. (The checklist is available in English, Chinese, Portuguese, and Spanish.) Consider internet access as well as comfort with technology.

For example:

- Partner with the IT department to put My Health Checklist into the online patient portal (Sutter)
- Order the checklist printed as a small booklet from the local print shop

In the photo below, the booklet is shown at left (users have said this compact format, printed on 8.5 x 11" paper that is then folded in half, may feel more approachable); the entire 8.5 X 11" sheets is shown at right/underneath:



Start small

Can you share it with one person or one unit and adapt your approach as needed before planning to spread more widely? Which staff do you want to reach? Who are the older adults that they support? Try asking to join an existing meeting.

For example:

- Share the checklist over coffee with someone who works on older adult care
- Encourage staff to start personally with the checklist
- Show your wider team a copy and see who gets excited (Sutter)
- Discuss at a unit meeting (Bayhealth)
- Share with a social worker to use with patients at the independent rehab facility (Sarasota)
- Share with two nurses who are geriatric rounders in the acute care for the elderly (ACE) program (Sarasota)
- Try it out with students in the Emergency Department (Case Western)
- Share with a hospitalist and two nurses who work across inpatient and outpatient care (Bridgeport)
- Share with acute care chaplain services (Sutter)
- Share with older adult volunteers (Hudson)
- Present to Patient Experience Council (Hudson)

Share externally

Where do you have existing connections and relationships? Partner with community organizations.

For example:

- Join existing resident advisory meetings at an assisted living facility or long-term care site (Hudson)
- Attend an existing primary care clinic meeting (Bayhealth)
- Share with home health leadership (Sutter)
- Work with a pharmacy
- Place in a doctor's office waiting room or information packets
- Partner with the AARP state office
- Reach out to a community church (Bridgeport)
- Pair information about the checklist with existing meetings about services for older adults and age-friendly care to share about overall service for older adults (Bayhealth)
- Provide to Medicare enrollees
- Distribute through Meals on Wheels or similar services
- Share at a community-based health fair
- Leave copies at the library
- Connect with faith leaders
- Bring to the local senior center or Area Agency on Aging
- Hand out at a conference or nursing symposium. Leftover printed checklists can be used to share with staff and patients (Sutter)
- Share at an internal convening, such as an all-manager meeting (Sutter)
- Offer at gatherings of family caregivers

Ways to introduce the checklist and the 4Ms

How will you talk about the checklist? Can you adapt existing presentation materials from IHI?

For example:

- Adapt this slide deck from IHI.
- Share these resources from AARP, including two videos of providers talking about how shared decision-making with My Health Checklist leads to more meaningful care.
- Share a story about your own experience with the checklist.

- Try saying, “Here is a checklist to ensure older adults receive age-friendly care that promotes what matters to them and their health. Would you like a copy?” (Case Western)
- Share with patients being discharged from the hospital that have a follow-up visit scheduled with their primary care physician. Explain how the checklist is an optional guide to help them navigate important topics they would like to discuss with their providers. (Bridgeport)
- Use key phrases such as: this is for individualized care, to promote safety, a guide for conversation. (Hudson)

Consider your audience. Are they familiar with age-friendly care and the 4Ms?

For example:

- Explain briefly that this is to ensure that older adults get age-friendly care and promote what matters. (Case Western)
- Introduce the 4Ms – it’s a good way to start. Often part of teaching in the hospital is talking about how things change over time as the body ages. Then, present the checklist. (Hudson)
- Ensure the audience understands what age-friendly health care is and why it is important in driving optimal patient outcomes. (Sutter)
- If the audience isn’t familiar with the 4Ms, simply share the checklist to get started! (Atlantic, Sarasota)

Collect feedback

Invite staff, older adults, and caregivers to share their experience with the checklist.

For example:

- Share the checklist with three colleagues and ask for their thoughts.
- Share an email address alongside the checklist where older adults can share feedback. (Hudson)

Going deeper

Internal processes

When starting small, you may be able to test with a few patients independently. To spread more widely, do you need approval to distribute the checklist widely (e.g., compliance officer, chief nursing officer)? Do you want to create a cobranded version with your site’s logo added?

For example:

- A number of teams at different health care organizations sought and received permission (from the chief nursing officer, CEO, or chief nurse educators) to share My Health Checklist across the site.

Training

Get familiar with related training that your organization offers and ask to partner with people running those activities. Integrate the checklist into standard processes like orientation.

For example:

- Share My Health Checklist at staff orientation.
- Include the checklist in a staff training about Age-Friendly Health Systems. (Mann Grandstaff VAMC)
- Host a workshop for providers.
- Add to provider education about “agenda setting” for health care appointments in collaboration with the patient.
- Make a video of staff describing their personal experiences with My Health Checklist. Or, hold a raffle for staff who have completed the checklist themselves or with someone they know to offer small prizes.

Collect feedback over time

What happens when an older adult receives the checklist, completes it, and then brings the checklist to an appointment or other health care conversation?

For example:

- Older adults who receive the checklist in one setting (e.g., hospital inpatient) might bring the checklist and their questions to another setting (e.g., primary care provider [PCP]). Have conversations with PCPs to keep the lines of communication open about their experience of people coming into appointments using the checklist.
- Gather a small advisory group of older adults and ask them to provide feedback on whether it is helpful at an upcoming medical appointment (Parkview)

Share feedback and connect

Show staff how this checklist can help older adults. Build relationships across your organization.

For example:

- Feedback can be used to get buy-in. For example, if your hospitalist really likes it, then share with your CNO.
- Show how the checklist aligns with the values of your system or related initiatives that are underway. (Sutter)

- Use the checklist to forge connections with leaders in different parts of your organization or with sites in different parts of your system. (Sutter)

Stories in Action

Getting started

Start personally — sharing with dad. At Sutter Health, one team member used the checklist with her father. He has some mild cognitive issues and had several recent medical events. It took some prompting to help him understand the purpose of the checklist. At first, when asked what mattered to him in his health care, he said that his main priority is to have a good doctor. She followed up by asking more questions: What does a good doctor look like? What do they help support you with? The conversation helped her better understand her father's wishes, and also helped her reflect around how to educate patients about using the checklist.

Try it out professionally — two ACE nurses. At Sarasota, Joanna D'Elia, MSN, RN, GERO-BC, CPHQ, Geriatric Program Coordinator, is teaching two nurses who are geriatric rounders in the acute care for elderly (ACE) program. She says, "They love the focus on the 4Ms and going back to what matters most to the patient."

Introduce it to others

Format — portable printouts. The team at Hudson found it helpful to print the checklist as a booklet, which they said made it compact and easy to slide into a purse, as opposed to printing on full 8.5" x 11" sheets.

Start small — offer to the team and see who gets excited. Look for those motivated to champion age-friendly or patient-centered care and start there. At Sutter Health, Kerri Maya, PhD(c), MSL, RN, NPD-BC, Director, Continuing Professional Development, Sutter Health System Office, showed a copy of the checklist to her team and asked if anyone was interested in using or sharing the new resource. Her approach was to "see what sticks," like throwing spaghetti on the wall. Seeing the checklist sparked the curiosity of the Home Health Director, who volunteered to test it. The Director care deeply about efficiency and is curious to see how this might help.

Share externally – partnering with long-term care. At Hudson Hospital and Clinic, Joy Hughes, RN Care Management Coordinator, and Megan Hundertmark, PharmD, Inpatient Pharmacist, are introducing My Health Checklist over a series of meetings with a skilled nursing facility, assisted living facility, long-term care facility, primary care clinic, and the organization's Patient Experience Council. At the ALF and LTC, the session was listed on the activity board amongst bingos and other activities. The Hudson team sat in dining room, and centers brought residents in who they thought would be interested, as well as their spouses in some cases. Residents took time to fill it out on the spot.

Ways to introduce — going to the chiefs. At Mann Grandstaff VAMC, Charina de Leon, RN, MSN/MHA, UC Staff shared My Health Checklist with the inpatient and outpatient chiefs of medicine to get approval and support. She says, “I suggested joining one of their meetings to introduce the checklist and answer any questions they might have.”

Collect feedback — invite emails. At Hudson, Joy Hughes notes that the team found more avenues, in addition to partnering with long-term care and other facilities and bringing the checklist to staff through existing gatherings like the primary care clinic staff meeting. “We also anticipate that awareness days and months [like National Family Caregivers Month and Military Families month in November] are great times to intro this. For example, we’d like to bring the guide to the stroke awareness event the hospital hosts in the lobby.” The team wants to know what older adults think about the checklist after taking it home to complete. Hughes says, “We put a sticker on their guide with my email address asking older adults to share their feedback after using the guide.”

Going deeper

Internal processes — cobranding permission. A few teams using cobranded versions of the checklist (with their site’s logo added) approached their legal team first for review. None encountered any issues.

Training — piggybacking on other age-friendly resources. At Bayhealth, Felicia Cruz, MSN, APRN, AGCNS-BC, RN-BC, Geriatric Clinical Nurse Specialist, has found it helpful to pair information about the checklist with existing meetings, such as the Bayhealth Elder Service Team (BEST), to share overall services for older adults and age-friendly care. The checklist will be distributed in the inpatient setting and in the community, which means older adults might bring their questions back to their primary care providers (PCPs). She says, “We’re sharing the guide at planned meetings with PCPs so that they are aware of the tool and are prepared to have conversations with their patients.”

Share feedback and connect — align with your organization’s values and use the checklist **to develop relationships.** “A prepared patient” is a system-wide value across Sutter Health. Kerri Maya says, “My Health Checklist is ideal tool to help prepare older adults for conversations — a good talking point when introducing to others.” Sutter is revamping patient experience scripting across sites, and the checklist “aligns perfectly with this initiative,” she says. In addition, it’s important to connect with the many other entities across their multi-site system, especially primary care. Maya believes sharing the checklist can be a good entree to build relationships with staff in primary care and ultimately start the conversation to get sites on board with age-friendly care more broadly.

Acknowledgments

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The advice and stories in this resource have been gathered from the work of IHI and Age-Friendly Health Systems in partnership with the following organizations leading the way to learn from the use of My Health Checklist: Atlantic Health Systems, Bayhealth: Sussex Campus and Kent Campus, Case Western University, Erie County Medical Center, HealthPartners: Hudson Hospital and Clinic, JPS Health Network, The Peter Lamy Center on Drug Therapy and Aging at University of Maryland School of Pharmacy, Medstar Health, Parkview Health, Sarasota Memorial Health Care System, Sutter Health, Mann Grandstaff Veterans Affair Medical Center (VAMC), West Tennessee Healthcare: Bolivar Hospital, Yale New Haven Health: Bridgeport Hospital and Milford Campuses.

Learn more about My Health Checklist and Age-Friendly Health Systems at ihi.org/AgeFriendly.

Institute for Healthcare Improvement

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