



CMS Metrics for Person and Family Engagement (PFE)

PFE METRIC	INTENT	MUST BE IN PLACE TO MEET METRIC	Resources
1 Planning Checklist for Scheduled Admissions	For all scheduled admissions, hospital staff discuss a checklist of items to <u>prepare patients and families</u> for the hospital stay and invite them to be <u>active partners</u> in care.	<ul style="list-style-type: none"> Hospital has a planning checklist for patients with scheduled admissions. Hospital staff discuss the checklist with the patient and family prior to or at admission. 	https://www.mnhospitals.org/Portals/0/Documents/patientsafety/Patient%20Family%20Engagement/RoadmapMetric-1-508.pdf ; Page 1–9
2 Discharge Planning Checklist	For all inpatient discharges, hospital staff utilize and discuss a checklist to ensure key elements of discharge planning and care transitions are covered to <u>prepare patients and families</u> for discharge and invite them to be <u>active partners</u> in care.	<ul style="list-style-type: none"> Hospital has a planning checklist to proactively prepare for discharge. Hospital staff discuss the checklist with the patient and family to ensure a successful transition of care. 	https://www.ahrq.gov/sites/default/files/wysiwyg/professionals/systems/hospital/engagingfamilies/strategy4/Strat4_Tool_1_IDEAL_chklst_508.pdf
3 Shift Change Huddles or Bedside Reporting	Include the patient and/or family caregiver in as many conversations about the patient’s care as possible throughout the hospital stay.	<ul style="list-style-type: none"> On at least one unit, nurse shift change huddles OR clinician reports/rounds occur at the bedside and involve the patient and/or family members in all feasible cases. 	https://www.ahrq.gov/sites/default/files/wysiwyg/professionals/systems/hospital/engagingfamilies/strategy3/Strat3_Tool_2_Nurse_Chklst_508.pdf
4 Designated PFE Leader	Hospital has a designated individual (or individuals) with leadership responsibility and accountability for PFE.	<ul style="list-style-type: none"> There is a named hospital employee (or employees) responsible for PFE efforts. Such individual(s) can hold either a full-time position or a percentage of time within another position. Appropriate hospital staff and clinicians can identify the person named as responsible for PFE. 	https://www.ahrq.gov/sites/default/files/wysiwyg/professionals/systems/hospital/engagingfamilies/howtogetstarted/Best_Practices_Hosp_Leaders_508.pdf
5 PFAC or Patient/ Family Representative(s) on Hospital Committee	Ensure that a hospital has a formal relationship with patient and family advisors (PFAs) from the local community who provide input and guidance from the patient perspective on hospital operations, policies, procedures, and quality improvement efforts.	<ul style="list-style-type: none"> Patient and/or family representatives from the community have been formally named as members of a PFAC or another hospital committee (at least one patient.). Meetings of the PFAC or another committee with patient and family representatives have been scheduled and conducted. 	https://www.ahrq.gov/patient-safety/patients-families/engagingfamilies/strategy1/index.html

CMS = Centers for Medicare & Medicaid Services; PFAC = Patient and family advisory council