Family Check-In Calls Job Aid

Getting Started

This guide will help orient you with the role attributed to labor pool staff managing family check-in phone calls.

Due to visitor restrictions, we are experiencing increased calls from families wanting to ask how the patient is doing. We are taking a proactive approach to meeting the needs of family members by contacting them with a supportive phone call and to identify any special events or recognition to be given to the patient.

Main Menu – click the item below to jump to that section

Family Check-In Calls Job Aid.................................................................1
Role Guidelines and Scripting...............................................................2
Call Log Template..............................................................................5
Unit Assignments................................................................................6
Appendix One: Names and Phone Numbers of Case Managers..........7
Role Guidelines and Scripting

1) Access census list of patients on the unit you are assigned using EPIC. Update the log with new patients. Wait a few days after admission before calling loved ones.

2) Check in with nurses on unit to see if there are any families they recommend you not call.

3) Use Patient Communication Choices form in EPIC-Media (see steps below) to identify family member(s) to call. If form is not filled out, default to first listed emergency contact. Check on Summary page under “getting to know you” section to see if there are any relevant notes in the HIPAA section.

4) Visit patients, if they are available, to let them know you will be attempting to talk with one of their loved ones by phone. Ask patient for permission to call their loved one, and if they give permission ask if they have any messages or updates they would like to relay. If they ask you not to call, please leave a note in the log book that you declined to call at patient’s request. If patient is not decisional or unable to communicate with you, rely on RN’s recommendation regarding call. If in doubt about whether to call or not, reach out to Kim or Linnea.

5) Attempt a phone call to person identified.
   - If no one answers, do not use patient name in the message. Leave a general message on a voicemail to assure HIPPA compliance ‘This is ____ calling from Marianjoy just to check in with family, I will call back at another time.’
   - If someone answers, begin the conversation with scripting such as:

     “Hello. Is this ___________________ (name of contact in the chart?) This is ______ from Marianjoy and I wanted to check in with you and let you know your______ (relation to patient), ____________ (name of patient), is being well taken care of. I was able to visit with your loved one this morning and they wanted you to know that __________________________. Are there any special things you would like us to keep in mind as we care for your loved one or is there a message you would like me to give to your loved one?”
Please use the following triage tree if loved ones have specific questions or needs:

- Questions about discharge plans, plan of care, equipment, patient’s progress, appropriateness of therapy, or other case management issues:
  - Look up name of case manager in Epic under treatment team in summary - snapshot tab.
  - Provide first name and phone number of Case Manager to loved ones.
  - Leave note in log sheet that contact information for Case Manager has been provided.

- Spiritual and emotional needs, distress profound sadness or worry:
  - Send e-mail to linnea.winquist@nm.org for triage.
  - Leave notes about specific needs on Teams site notes.

- Patient engagement or satisfaction:
  - Send e-mail to kim.pedersen@nm.org for triage.
  - Leave notes about specific concerns on Teams site notes.

- Nursing questions or requests:
  - Reach out to pts assigned nurse for the shift.
  - Leave note on log sheet that nurse was contacted.

- Other concerns not in first four categories:
  - E-mail Kim.pedersen@nm.org and Linnea.winquist@nm.org for follow up.

- For patients/families asking about when they will be updated about progress, we can use this general statement:  
  Your case manager will be contacting you to let you know the process. There is a weekly meeting of your (your loved one’s) care team and once that meeting occurs the case manager will round back with the patient and main family member contact for updates. Case managers are also available for questions and can connect you with other team members as needed to fully answer your questions.

  If they ask when that meeting happens you can honestly say you don’t know it’s different dates for different patients.
  If they ask if they can be part of this meeting, you could tell them it’s a meeting of care teams coming together to talk about multiple patients they are caring for, so wouldn’t be appropriate from a privacy perspective. You can also say at some point their case manager will be scheduling a virtual family education session.

- To find name of Case Manager assigned to patient, go to summary page, patient profile to find out who case manager is. You can provide first name and phone number of case manager to family member who they can call regarding questions and they will triage questions to other team members as appropriate.
• Please share that they can bring laundry for delivery.
  ➢ Laundry drop-off/pick-up hours are:
    – 10:00a.m. – 12:00 noon
    – 4:00p.m. – 6:00p.m.
  ➢ They should park in the parking garage and call (630)909-8003 to let us know they are here.
  ➢ Front desk staff will call the nursing unit to check for any dirty laundry, and will call them to let them know when they can pull up to the front of the hospital. We will bring dirty laundry out to them and retrieve clean laundry to be delivered to their loved one.
  ➢ Note: We cannot keep dirty laundry here until day of discharge (no room), we cannot wash laundry here. The IDPH Coronavirus website does have information regarding washing of laundry under: Cleaning and Disinfection for Households; Linens, Clothing or Items That Go Into Laundry.
  ➢ If loved ones are asking questions about COVID 19, here is some information you can provide:
    ➢ General Covid19 can go to the Illinois Department of Public Health (IDPH) website IDPH.Coronavirus or call 800-889-3931.
    ➢ If they ask about COVID 19 testing of the patient before discharge: “Your Mom’s attending Marianjoy physician will discuss with the patient and family what is needed for the patient’s safe discharge”
    ➢ If families ask, the care team will be sharing safety instructions regarding care after discharge given the COVID pandemic during Family Education, and as part of the discharge process.
    ➢ Be careful not to make statements that can be perceived as alluding to the patient’s condition or progress (i.e. He is doing really well...).
    ➢ Be careful not to promise anything. If family shares a medical or nursing question, don’t tell them you will have the nurse or doctor call you back, instead tell them you will be sure to forward your question to the appropriate person.
    ➢ No one can visit through outside through the patient’s window. Safety and Security issue:
      ➢ Patients could try to come to window by themselves and fall
      ➢ Not safe for visitors-no sidewalks up to the windows
      ➢ Other patients may see this as a privacy issue
6) After call is finished, forward any nursing or physician follow up issues or concerns to the appropriate nurse or physician
   - If family member shares a concern about loved one being severely depressed or suicidal
     - please contact that patient’s nurse or the nursing supervisor immediately, and they will perform a suicidal screening process on the patient. Fill out a NETS report.
   - If a family member is expressing imminent suicidal ideation,
     - they should be directed to their local ER. If they can’t get themselves there for some reason, they should be directed to call 911. If they decline to call 911, please fill out a NETS report.

7) Document any special circumstances needing follow on Call Log Form (see page 4 of this guide) and email your page to patient relations (kim.pedersen@nm.org and Robert.riley@nm.org)
   - Use comments section of log to document your thoughts and continued follow up timelines with families you have called.
   - Save updated log after each shift.

8) 3-7 days after a patient is discharged, please make follow up phone call to check in with patient and/or family using the templates provided. Log these visits on the discharge log sheets for each unit.

9) Contacts for questions:
   - Vocera – Patient Relations or call 630-909-7080 or 630-909-8002
   - Vocera – Linnea Winquist or call: 630-909-8460

Call Log Template
Please click the links below to access the Call Log Template for the unit you are assigned to.

1_East_Family_Check-in_Call_Log.xlsx
1_West_Family_Check-in_Call_Log.xlsx
2_East_Family_Check-in_Call_Log.xlsx
2_West_Family_Check-in_Call_Log.xlsx
3_East_Family_Check-in_Call_Log.xlsx
3_West_Family_Check-in_Call_Log.xlsx

Unit Assignments

<table>
<thead>
<tr>
<th>Unit</th>
<th>Staff Member</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 East</td>
<td>Kathrina Prostka</td>
</tr>
<tr>
<td></td>
<td>Christine Remmes</td>
</tr>
<tr>
<td>1 West</td>
<td>Lydia Wilk</td>
</tr>
<tr>
<td>2 East</td>
<td>Ginny Girten</td>
</tr>
<tr>
<td>2 West</td>
<td>Amy Nourie</td>
</tr>
<tr>
<td>3 East</td>
<td>Paige Platenik</td>
</tr>
<tr>
<td>3 West</td>
<td>Gabrielle Kirk</td>
</tr>
</tbody>
</table>

Location to make calls:
- MARTI Center offices
- Treatment rooms: KW121, KW113, KW110, KW108, KW103, KW104

Hours:
- 7:30 a.m. – 1:00 p.m. or 11:30 a.m. – 5:00 p.m.
## Appendix One: Names and Phone Numbers of Case Managers

<table>
<thead>
<tr>
<th>Name</th>
<th>Office Phone</th>
<th>Cell Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Larisa Lahey (Manager)</td>
<td>630-909-8909</td>
<td>773-316-3176</td>
</tr>
<tr>
<td>Stacy Berendt</td>
<td>630-909-8900</td>
<td></td>
</tr>
<tr>
<td>Margalo (Anise) Foster</td>
<td>630-909-8898</td>
<td></td>
</tr>
<tr>
<td>Janki Sevak</td>
<td>630-909-8892</td>
<td></td>
</tr>
<tr>
<td>Melissa Giancana</td>
<td>630-909-8894</td>
<td></td>
</tr>
<tr>
<td>Tara Gee / Julie Forgue</td>
<td>630-909-8895</td>
<td></td>
</tr>
<tr>
<td>Stephanie Halihan</td>
<td>630-909-8886</td>
<td></td>
</tr>
<tr>
<td>Robin Levine-Rubin</td>
<td>630-909-8817</td>
<td></td>
</tr>
<tr>
<td>Eden Bonsonto</td>
<td>630-909-8240</td>
<td></td>
</tr>
<tr>
<td>Janet Yelovich (T-Th)</td>
<td>630-909-8543</td>
<td></td>
</tr>
<tr>
<td>Mary Dorner</td>
<td>630-909-8542</td>
<td></td>
</tr>
<tr>
<td>Leah Macaione</td>
<td>630-909-8922</td>
<td></td>
</tr>
<tr>
<td>Sharon Troike</td>
<td>630-909-8920</td>
<td></td>
</tr>
<tr>
<td>Laura Wilemon</td>
<td>630-909-8920</td>
<td></td>
</tr>
<tr>
<td>Andrea Childers</td>
<td>630-909-8920</td>
<td></td>
</tr>
</tbody>
</table>