Resources to Support Patient Advocates

THE BERYL INSTITUTE

Improving the Patient Experience
Committed to elevating the importance of experience across all care settings and recognizing the value of the entire healthcare team, this resource toolkit includes Patient Advocacy-focused content to help you support the continued development of Patient Advocates within your organization.

The following Patient Advocacy resources, learning and connections provides content for those that contribute to a positive healthcare experience for patients, families and the community and showcase the importance of advocating for patients to ensure an outstanding patient experience.

We encourage you to share this resource toolkit with your Patient Advocate staff in efforts to support their patient experience improvement efforts.

To access the full list of patient advocacy resources, you can filter by the content area ‘Patient Advocacy’ in the PX Site Search or click here.

We are ALL the Patient Experience!

The Beryl Institute is the global community of practice dedicated to improving the patient experience through collaboration and shared knowledge. We define patient experience as the sum of all interactions, shaped by an organization’s culture, that influence patient perceptions across the continuum of care.
Understanding the Patient Advocate Professional Role

We understand the role of patient advocates may vary by organization. The following definition is an excerpt from the Institute’s white paper on “Patient Advocate: A Critical Role in Patient Experience.”

There are many roles and titles for patient advocates. They are often referred to as patient representatives, patient liaisons, ombudsmen and of course patient advocates, in addition to other designations. But even more importantly, the roles they play within healthcare organizations are varied and their contributions numerous. The patient advocate usually fills one or more of five complementary roles in a healthcare organization:

1. Patient advocate
2. Information resource
3. Institutional change agent
4. Partner in collaboration between the community and the organization
5. Grievance coordinator

Additionally, many are involved in mediation, ethics consultations, staff education, interpretive services, organizing patient/family advisory councils, arrangements for international patients, including coordination of housing and transportation, discharge planning, response to codes to provide emotional support, lost and found, services for patients with special needs in compliance with the Americans with Disabilities Act, organ donation, advance directives and hotel management for out-of-town patients and families.

Many of these types of responsibilities are added to the patient advocate role because of the focus of these staff on the broader support of patient and family needs. They are also delegated these responsibilities because many administrators believe that patient satisfaction is the common denominator in each of these resources. Ideally, patient advocates who take on added responsibility also take on the authority necessary to carry them out either as leaders of or part of an organization’s overall patient experience function.

Some of the foundational areas of focus for patient advocates were looking at prevention and helping patients to actively participate in their own healthcare decisions. Patient advocates maintain many opportunities to advance this process, in ways such as:

- Explaining policies and procedures that patient’s question
- Mediating disputes among patients, families and staff
- Investigating complaints on behalf of patients, keeping them out of the center of conflict
- Introducing and discussing advance directives with patients and their families

As the patient advocate plays a central role in the broader work of patient experience, it is important to see and understand the skills and knowledge that are necessary for both.
Supporting Your PX Journey

Across the Continuum of Care

As illustrated in our definition, The Beryl Institute believes patient experience is influenced throughout the continuum of care - from before a patient ever enters your organization until after their treatment, and every interaction between and beyond their care encounter. Our resources will benefit all facilities within your organization - acute care hospitals, ambulatory surgical centers, urgent care centers, imaging centers and more, in addition to the full breadth of departments and roles that make up each organization.

Key Patient Experience topics and themes addressed through the resources listed on the following pages include:

**BUILDING A CULTURE OF EXCELLENCE**
- Organizational Effectiveness
- Employee Engagement
- Physician Engagement
- People Development
- Hiring for Fit
- Reward and Recognition
- Coaching and Mentoring

**CULTURAL COMPETENCE & DIVERSITY**
- Healthcare Literacy
- Translation Services
- LGBTQ Community

**QUALITY & SAFETY**

**PATIENT/FAMILY ENGAGEMENT**
- Patient & Family Advisory Councils
- Experience-Based Co-Design

**PATIENT ADVOCACY**
- Managing Complaints & Grievances
- Service Recovery

**SPIRITUAL CARE**

**PX STRATEGY/INNOVATION**
- Process Improvement Methodologies
- Journey Mapping

**COMMUNICATION**
- Compassion and Empathy
- Social Media
- Rounding

**HOSPITALITY & HEALING SERVICES**
- Concierge Services
- Healing Arts

**PHYSICAL ENVIRONMENT**
- Quiet at Night
- Environments of Care

**TRANSITIONS OF CARE**
- Clinical Partnerships
- Post-Discharge Planning/Follow-up

**METRICS & MEASUREMENT**
- Satisfaction Surveys
- Real-time Feedback
- Data Analysis

**TECHNOLOGY SOLUTIONS**

**POLICY & REGULATORY ISSUES**
From innovative patient experience research to real-world looks at patient experience improvement efforts, the growing library of patient experience resources are here to assist your staff to advance patient advocacy improvements in the patient experience.

**WHITE PAPERS**

Central to our shared commitment to improving the patient experience is this series of informative and thought-provoking publications that dig into the critical issues facing the healthcare industry today. As part of the overall library of white papers from the Institute, featured white papers focused on Patient Advocacy include:

![Patient Advocate: A Critical Role in Patient Experience](image1)

![Reflections from Patient Experience Professionals Impacted by Personal Healthcare Experiences](image2)

**PX JOURNAL**

Patient Experience Journal (PXJ) is an international, multidisciplinary, and multi-method, open-access, peer-reviewed journal focused on the research and proven practices around understanding and improving patient experience. As part of the overall library of articles published by PXJ, featured articles and research focused on Patient Advocacy include:

- Bringing patient advisors to the bedside: a promising avenue for improving partnership between patients and their care team
- Evaluating recall of key safety messages, and attitudes and perceptions of a patient safety initiative at a pediatric hospital
- Patient complaints as predictors of patient safety incidents
- Patient partnership in quality improvement of healthcare services: Patients’ inputs and challenges faced
- The patient patient: The importance of knowing your navigator
- The power of patient ownership: The path from engagement to equity
Learning opportunities shape the evolving field of patient experience and support the consistent and continuous development of patient experience professionals. These learning opportunities will support your Patient Advocates through all the stages of their patient experience journeys.

**WEBINARS**

Facilitated by patient experience leaders from around the world, webinars share proven practices and strategies to implement in your own organization. As part of the overall library of on-demand webinars from the Institute, featured on-demand webinars focused on Patient Advocacy include:

- Care Coordination & Transitions: How to Use Tools to Avoid the Common Pitfalls
- Complaint Management: A Rapid Team Response
- Complaints and Grievances
- Debunking Common Myths about Service Recovery
- Defining the Role of Patient Advocates
- Disruptive Behaviors
- Employee Engagement: We are ALL Patient Advocates!
- Grievance Letter Writing for Healthcare Consumer Advocates
- Language Access and Patient-Centered Care: Partnering with Language Specialists to Enhance Patient-Centered Care
- Managing Patient Grievances
- Practicing with Kindness, Compassion and Firmness: Setting Appropriate Boundaries with Patients and Families
- Service Recovery
- Sharpening Communication Skills for Relationship-Centered Care
- When Patient Engagement Competes with Safety: Compassionate Approach to Limit Setting in Disruptive Situations

**TOPIC CALLS**

During these interactive, multimedia events, a small group of participants engage in a dialogue on a specific topic, sharing ideas and practices that have been implemented to address the issue. As part of the overall library of topic call replays from the Institute, featured topic call replays focused on Patient Advocacy include:

- How do you effectively work through difficult patient situations?
- Managing Complaints and Grievances: How do you ensure the best outcomes for all?
- Service Recovery: How are you responding when patients’ and families’ expectations fall short?
CASE STUDIES

Our ongoing case study series offers an exclusive look into current healthcare efforts, presented as both an opportunity to learn from others as well as a spark for further ideas on how we can work to improve the patient experience. As part of the overall library of case studies from the Institute, featured case studies focused on Patient Advocacy include:

- Creating a Caregivers Support Program to Improve the Patient and Family Experience
- Managing Information Shared at Admission
- Recording Discharge Instructions to Improve Patient Compliance and Satisfaction
- Reducing Patient Anxiety and Improving Patient Knowledge

CERTIFICATE IN PATIENT ADVOCACY

Through the Patient Experience Body of Knowledge Courses, the Institute offers a certificate program in patient advocacy. Patient Advocates play a critical role in addressing the important issues of patient advocacy, patient’s rights and ethics in patient care. The program will give you the key knowledge and skills necessary to succeed in the field of healthcare patient advocacy as well as offering tools and strategies to enhance the patient experience. Approved for 15 Patient Experience Continuing Education credits.

LEARNING BITES

The learning segments are brief webcast videos highlighting key insights on a variety of patient experience topics to provide ideas, recommendations and opportunities in addressing and excelling in the patient experience. As part of the overall library of learning bites from the Institute, featured learning bites focused on Patient Advocacy include:

- Passion for Service Recovery
  Carol Santalucia, Vice President, and Toya Gorley, Director, Client Services, CHAMPS Patient Experience

- Setting Boundaries with Patients and Families
  Kim Pedersen, Administrative Director, Patient Relations, Marianjoy Rehabilitation Hospital

- Three Ways Empathy Can Build Relationships in Healthcare
  Colleen Sweeney, Owner, Sweeney Healthcare Enterprises

- Service Recovery and Apology: Getting it Right
  Andrew Gallan, Assistant Professor at DePaul University

- Three Communication Skills Everyone in Healthcare Should Have
  Anita Woodward, Owner, A. Woodward & Associates

- Why Should We Care "What Matters Most" to Our Patients and their Families?
  Mary Ann Dragon, Director, Patient and Family Services, Rainbow Babies and Children’s and MacDonald Women’s Hospitals University Hospitals
The Patient Advocacy Community (PAC) brings together individuals focused on contributing to a positive healthcare experience for patients, families and the community and who understand the importance of advocating for patients to ensure an outstanding patient experience. The community provides a collaborative space and venue for sharing ideas, practices, challenges and opportunities.

PAC DISCUSSION GROUP IN PX CONNECT

Exclusive to members, PX Connect is an online community that allows members to network, collaborate and offers a forum for exchanging ideas and resource sharing. Most recent PAC discussions include topics such as:

- Rounding on Employee and Patients
- Discharge Phone Calls
- Dual Role (Advocate/Interpreter)

PAC CONNECTION CALLS

Quarterly PAC Connection Calls provide an opportunity for networking and idea sharing with peers. In addition to a brief presentation on a pre-announced topic, each call includes time for general discussion on the issues most impacting patient advocates today.

PAC GATHERING AT PATIENT EXPERIENCE CONFERENCE

A core piece for ongoing dialogue is the Patient Advocacy Community Gathering, which holds their annual meeting during the Patient Experience Conference. The primary purpose of the community gathering is to engage in facilitated discussion to share ideas, strategies and questions, and to provoke deeper thought around the patient experience. The annual Patient Advocacy Award, inspired by founding Patient Advocate Ruth Ravich, is presented during this gathering.
The Patient Advocacy Community Work Groups help support the work and provide direction for the PAC. The PAC is your connection to other professionals who represent and advocate for consumers across the healthcare continuum.

The PAC Work Groups and leaders include:

**ADVOCACY**
Explore relationships/partnerships with groups/organizations who are interested in patient advocacy. Facilitate collection of PAC newsletter content.
*Carol Santalucia, Director of Service Excellence, Cleveland Clinic*

**AWARDS AND SUCCESSION**
Facilitates application process and selection of the Ruth Ravich Patient Advocacy award, which is presented at The Beryl Institute annual conference. Creates process for identification and inclusion of top performers into succession plan for PAC.
*Kate Clarke, Manager, Patient Relations/Interpreter Services, Northwestern Medicine*

**CERTIFICATION**
Work on how to share/communicate the option to apply for a certification for advance practice patient relations. Assure for continuation of this certification process. This certification is not a testing system but includes completion of continuing education, case studies, process improvement and a phone interview.
*Irene Zbicza, Director, Patient Relations, Mills-Peninsula Health Services*

**EDUCATION**
Ensure for timely, relevant educational opportunities that are specific to patient advocacy. Educational opportunities are delivered via webinar, conference calls and at Patient Experience Conference. Members are responsible for identifying topics, selecting speakers and sharing their expertise with the PAC community.
*Brenda Radford, Director, Guest Services, Duke University Hospital*
*Toya Gorley, Director, Patient Experience, CHAMPS Patient Experience*

**MEMBERSHIP**
Develop strategies to recruit and retain PAC members.
*Kim Pedersen, Administrative Director, Patient Relations, MarianJoy Rehabilitation Hospital, part of Northwestern Medicine*
*Nicole Cable, CPXP, Corporate Director of Patient Experience Programs, ChenMed*

**PUBLICATIONS**
Recommend and assist in developing patient advocacy publications.
*Eve DeVaro Fowler, Director of Patient Advocacy, Bon Secours Baltimore Health System*

**REGIONAL COMMUNITIES**
Work collaboratively to develop strategies to reach out globally to PAC communities to identify needs and provide a forum for networking.
*Kim Pedersen, Administrative Director, Patient Relations, MarianJoy Rehabilitation Hospital, part of Northwestern Medicine*