



Strengthening  
Med Safety in  
Long-Term Care



# Trailblazer Home Workbook

## Resident and Family Engagement in Medication Management



**November 2022**

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## Introduction and Overview

Welcome to the *Resident and Family Engagement* group!

Over the next 6 to 9 months, you will receive education, facilitation and coaching from ISMP Canada staff to support your team as you aim to improve resident and family engagement in their medication management.

Gaining this important perspective can support improvement in all aspects of your home. One of the key things to remember is that residents and families can and should be involved in all aspects of this work. Their perspective is important to authentic and sustainable change.

## Ready!

### Toolkit

The [toolkit](#) that has been created is a resource that will give you information and tools to use throughout the journey. Your working group should take time to become familiar with the activities and resources found within it.



### Assessment

There are 3 main assessment tools that have been made available to help your working group determine your baseline and also how the improvement will progress over time.

Your home has already completed the [Medication Safety Self-Assessment \(MSSA\)](#). This can be reused at regular intervals (yearly or longer). One of the most important components of this assessment is the presence of resident and families on medication safety committees. They are an important part of improvement processes. See **Appendix A** for table you can use to compare results year over year.

MSSA-LTC Questions on Resident/Family Engagement	
<b>Core characteristic 1:</b> Residents or their substitute decision makers are included as active partners in their care through education about their prescribed medications and ways to prevent harm associated with medication use.	
1.1 The medication safety committee includes resident/family caregiver representatives.	
1.2 During care conferences and other interactions with resident/family caregivers, prescribers and other members of the health care team discuss health priorities (i.e., what matters to you?) and encourage active participation in shared decision-making about medication therapy (for example, using resources such as 5 Questions to Ask About Your Medications).	
1.3 Residents and family caregivers are given the opportunity to learn about their medications and how they can help to prevent errors (e.g., if able, provide their name when asked during medication administration).	
1.4 When a new medication is prescribed, a practitioner (e.g., prescriber, nurse, consultant pharmacist) educates the resident or family caregiver of the name and dose of the medication, the general purpose for use, expected outcomes and important side effects and obtains informed consent.	
1.5 All harmful or potentially harmful medication incidents that reach a resident are fully disclosed to the resident and/or family caregiver(s) in a timely manner. <b>NAI</b>	
1.6 When a resident experiences a medication incident, the resident and/or their family caregivers are given an opportunity to share their perspective as part of the information gathering step of an incident analysis and are invited to provide input into possible preventive actions.	

The [Resident and Family Survey](#) was originally created by the ISMP Canada faculty and then improved by Champion Homes. It consists of 9 questions that seek information from the community about their involvement in their medication journey. If there are other questions that are applicable to your community, add them on. The more information gleaned, the clearer the opportunities for improvement will become.

Begin by sampling 20 residents and/or families as part of the required indicators for the baseline assessment (due in early January). Then, plan to roll it out to the rest of the home. You could send it to resident and families by email, ask a volunteer to survey residents in the home (where applicable) or include it in the regular survey that your home sends out. See the link above for a pdf of the survey, and **Appendix B** for a tracking sheet that will help you organize results. This tool can be used again after a period of 1 – 2 years.

The International Association for Public Participation (IAP2) has developed a [spectrum for public participation](#) based on a set of core values and is guided by a code of ethics. On the spectrum, there are participation goals and promises to the public. Using the Spectrum as a guide, your team should read the chart and determine, based on current data, where your community (residents and families) falls, broadly, within the home. You can record examples of where you see the different levels engagement on the tracking sheet in **Appendix C**.

## Set!

As a working group, review the assessment results. Describe the results of your completed Resident and Family Engagement Baseline Assessment and possible opportunities for improvement.

### Strengths

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### Opportunities for Improvement

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

The Quality Improvement (QI) team at ISMP Canada has created eLearning modules that your team has an opportunity to take at your convenience. There are a variety of modules that you can choose from located [here](#). It is suggested that the team begin with the **Introduction to Quality Improvement** and **Process Mapping – an Introduction**. These foundational courses will support your improvement work going forward.

With your team, decide on an intervention that will address the opportunities for improvement identified above. Consider interventions that can be measured with SMART goals – *Specific, Measurable, Achievable, Relevant and Time-bound*. This gives a clear understanding of what needs to be completed and provides a mechanism to measure the outcome based on defined criteria. What actions will you develop, implement and evaluate to improve resident and family engagement in medication management in your home?

## Go!

With your working group, choose one intervention to implement. Keep the project narrow in scope to begin with, focusing in on one aspect to improve. Use the knowledge gained in the Introduction to Quality Improvement and Process Mapping modules to help guide you. Trailblazers can reach out for support at any time: [melissa.sheldrick@ismpcanada.ca](mailto:melissa.sheldrick@ismpcanada.ca).

During this implementation period, take an opportunity to meet with your resident council to share your plans as an additional opportunity to engage. Listen to any feedback they may have as their perspectives are very important. You can share the video and brochure with residents and families as well. Encourage them to use their voice in their medication management.

## Keep Going!

It is possible that you see ways to improve your project as you are working through it and it is okay to adjust it as needed. The only way to observe change is to measure it. You can reassess resident and family engagement in their medication management over time. Plan for at least 12 months to pass before reassessing med management engagement. Be sure to celebrate successes and plan for continued improvement!

## Schedule

November	December	January	February	March	April - September	October & Onward
<ul style="list-style-type: none"> <li>Nov 3 – Kick Off</li> <li>Begin baseline data collection</li> </ul>	<ul style="list-style-type: none"> <li>Continue data collection</li> <li>Provincial Webinar Dec 7</li> </ul>	<ul style="list-style-type: none"> <li>Familiarize with toolkit</li> <li>Take Intro to QI &amp; Process Mapping eLearning modules</li> <li>Send sample of 20 survey results with the indicator work</li> </ul>	<ul style="list-style-type: none"> <li>Cohort session (Feb 8/23)</li> <li>Review Assessment results</li> <li>Determine and plan intervention</li> <li>Share plan, Resident and Family resources with resident council</li> </ul>	<ul style="list-style-type: none"> <li>Begin implementation</li> <li>Provincial Webinar Mar 22</li> </ul>	<ul style="list-style-type: none"> <li>Cohort Session (April 3/23 &amp; June 12/23)</li> <li>Provincial Webinar Jun 14</li> <li>Continue implementation and iterate as needed</li> </ul>	<ul style="list-style-type: none"> <li>Reflect and reassess using baseline tools</li> <li>Celebrate and share improvement</li> </ul>

### Details

- Kick off – Full day November 3, 2022
- Cohort Session – Discussion time with ISMP Canada Coach and other homes working on similar projects (1hr) (dates: Feb 8, April 3 & June 12, 2023)
- Provincial Webinars (December 7, 2022, March 22, 2023 & June 14, 2023)
- Faculty support as needed – email [melissa.sheldrick@ismrcanada.ca](mailto:melissa.sheldrick@ismrcanada.ca)

## \*ENGAGE RESIDENTS AND FAMILIES THROUGHOUT THE PROCESS!

\*At cohort sessions, we will have an opportunity to discuss progress, challenges and next steps. Please bring all data you have collected and relevant information to each meeting. Also, please ensure that all information is de-identified.

## APPENDIX A

Use this table to organize your results at a glance. Please note that this function is also available as part of the MSSA program.

Note: Number values coordinate with MSSA rating scale: Never=0 Rarely=1 Sometimes=2 Often=3 Always=4

Characteristic	Year 1	Year 2
SAMPLE: 1.1 The medication safety committee includes resident/family caregiver representatives	1/4	4/4
1.1 The medication safety committee includes resident/family caregiver representatives		
1.2 During care conferences and other interactions with residents/family caregivers, prescribers and other members of the health care team discuss health priorities (i.e., What matters to you?) and encourage active participation in shared decision-making about medication therapy (for example, using resources such as 5 Questions to Ask About Your Medications).		
1.3 Residents and family caregivers are given the opportunity to learn about their medications and how they can help to prevent errors (e.g., if able, provide their name when asked during medication administration).		
1.4 When a new medication is prescribed, a practitioner (e.g., prescriber, nurse, consultant pharmacist) informs the resident or family caregiver of the name and dose of the medication, the general purpose for use, expected outcomes and important side effects and obtains informed consent.		
1.5 All harmful or potentially harmful medication incidents that reach a resident are fully disclosed to the resident and/or family caregivers in a timely manner.		
1.6 When a resident experiences a medication incident, the resident and/or their family caregivers are given an opportunity to share their perspective as part of the information gathering step of an incident analysis and are invited to provide input into possible preventive actions.		
Notes		

## APPENDIX B

### Resident and Family Engagement Survey Tracking Form

Use this tracking form to help you track responses from residents and families. It will provide an at-a-glance data that will be helpful as you plan your project. You will find the survey [here](#).

<i>Survey Question:</i>									
1. How involved are you in decisions about your medications?	a)	b)	c)	d)	e)				
2. Do you know what your medications are? Do you know what they are used for?	a)	b)	c)	d)					
3. Are you involved as much as you want to be in decisions about your medications?	a)	b)	c)	d)					
4. Are you comfortable with your medications?	a)	b)							
5. How do you feel after taking your medications?	a)	b)	c)	d)	e)	f) Describe:			
6. On a scale of 1-5, how sure do you feel that the medication management system in your home is safe?	a)	b)	c)	d)	e)				
7. Do you feel you are kept informed of your medications and changes?	a)	b)	c)	d)					
8. When you raise a concern about your medication to any staff, what happens?	a)	b)	c)	d)	e)	f)			
9. How much do you know about your medications?	a)	b)	c)	d)	e)				

# APPENDIX C

## iAP2 Spectrum Chart

Use this chart to note where you see examples of each level of involvement in your home. If you would like to use this as a fillable form, email: [melissa.sheldrick@ismppcanada.ca](mailto:melissa.sheldrick@ismppcanada.ca) and I will send you the file.

The International Association for Public Participation (IAP2) has developed a spectrum for public participation based on a set of core values and is guided by a code of ethics. On the spectrum, there are participation goals and promises to the public. What goals does your long-term care home set for resident and family participation and what can be promised to them? How can movement on the spectrum be improved or impacted? Use this chart to assess where your home is in terms of resident and family engagement in medication safety.

LEVEL OF INVOLVEMENT: International Association for Public Participation (iAP2 SPECTRUM)					
	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
<b>Public Participation Goal</b>	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives and/or solution.	To obtain public feedback on analysis, alternatives and/or decision.	To walk directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision-making in the hands of the public.
<b>Promise to the Public</b>	We will keep you informed	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how the public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice & recommendations into the decisions to the maximum extent possible.	We will implement what you decide.
<b>Below, record examples of resident and family engagement in medication safety that you have observed/implemented in your home.</b>					
<b>Sample information that can be included + date</b>	10/21 Established an information board for residents and families to be informed of home "news".	02/22 Collected information via resident and family survey about medication management.	05/22 Communications sent to residents and families about how their survey feedback will be used.	01/22 Invited a resident and a family member to be part of the working group.	12/21 Surveyed the residents/families to decide on new processes for communication methods.
For more information about the iAP2 Spectrum, visit: <a href="https://iap2canada.ca/foundations">https://iap2canada.ca/foundations</a> . Thank you to team at Fairview Lodge for the creation of, and willingness to share this template.					



Questions about Resident and Family Engagement?  
Email [melissa.sheldrick@ismpcanada.ca](mailto:melissa.sheldrick@ismpcanada.ca)

Other questions? Email [ltc@ismpcanada.ca](mailto:ltc@ismpcanada.ca)