



## HOW TO CONDUCT A “WALK-ABOUT” IN PRIMARY CARE FROM THE PATIENT AND FAMILY PERSPECTIVE

One way to begin working with patients and families in planning for improvement is to explore your primary care setting through the eyes of patients and their families. A “walk-about” is an activity that can be used to obtain patient and family perspectives. If you have patients and families who are advisors within your program, ask them to participate in the activity. If you don’t currently have any patient or families identified as advisors, invite several patients and families who receive care in your facility. It is helpful to have more than one patient and family perspective. Select patients and families who are willing to share their opinions (refer to the resource titled, *Selecting, Preparing, and Supporting Patient and Family Advisors in Primary Care* for detailed guidance).

### Instructions:

Select a time when the entire team, including patients and families, can tour the facility together. If he or she feels comfortable doing so, a patient/family advisor could lead this tour. The tour should begin at the first point of entry into the facility (e.g., the parking lot), and continue through all of the activities of a typical care visit, including a simulated visit and exam. Consider all the experiences of the visit, not just the time a patient spends with a care provider in the exam room. You want to specifically explore how the following elements promote preventive care, healthy behaviors, self-management of chronic conditions, and encourage patients and families to be active members of the health care team:

- How patients and families are greeted.
- The processes of care and exchange of information in the administrative and ancillary areas (e.g., lab, pharmacy).
- The processes of care and exchange of information during a visit and exam.
- Patient forms and educational materials (or anything else they may receive or need to fill out as part of a visit).
- Characteristics of the physical environment (signage, artwork, color, lighting, visible equipment and arrangement of furnishings).
- Public materials (e.g., posters, magazines, announcements).

The team should collect “evidence.” Assign one or more of the team to document the “walk-about” through:

- Digital photos, slides, or videotape.
- Notes from observation of simulated patient visit and exam.
- Patient forms and educational materials.
- Specific quotes or messages on posters or other announcement.

Make sure that the patients and families are expressing why they want a particular element of the environment captured in the photos or video. What is their perspective? One team member should be assigned to take notes during the tour to capture these thoughts. While this exercise is designed mainly for staff to see the care experience through the eyes of patients and families, all team members should be given the opportunity to identify elements and processes that are important to their work with patients and their families. These may be elements or processes that physicians and staff perceive as helping or hindering their ability to encourage patients and families as active partners in care and decision-making.

The “walk-about” activity can be a fun, non-threatening way to begin to work with patient and family advisors and develop an appreciation for and level of comfort with the collaborative process.

The “walk-about” can also be beneficial for patient and family advisors and potential advisors. It builds their understanding of staff and physician perspectives, care processes, and the environment of care. It allows them to begin to get a broader view of the positive elements of the system of care as well as areas for improvement. For new and potential advisors the activity can build their interest and confidence level for serving as an advisor.

Set aside a meeting time to discuss what the team discovered through the “walk-about.” Bring all the “evidence” to the meeting and discuss what you have learned about the experience of care through the eyes of patients and families. The tool titled, *Wearing New Glasses*, can be used to record the findings of your “walk-about” and plan for change.