

Patient Education Governance

The Importance of Policy

Policy development should focus on using existing organizational goals measured by specific metrics to guide the development and use of patient education materials.

The policy should establish a transparent process to be used when:

- considering requests for patient education materials
- updating guidelines for the use of patient education materials
- monitoring utilization of patient education to ensure compliance with guidelines
- ensuring regular reviews of all patient education materials by subject matter experts

The policy should explicitly state the process for submitting patient education requests and the criteria that will be used to evaluate those requests. Considerations should include:

- available relevant patient education
- applicable clinical guidelines/procedures
- resources available to customize or develop patient education
- priority level of all pending patient education requests

Centralization of Governance, Diffusion of Governance, or a Hybrid

A centralized governance model uses a cross-functional committee to recommend, review, approve and establish guidelines for the delivery of education materials to patients. Representatives are drawn from nursing and physician leadership, front-line clinicians, informatics, information technology, patient experience and any other staff qualified to provide input on patient education. This model allows for the greatest degree of consistency, control, and adherence to patient education guidelines across the organization.

Alternatively, departmental liaisons or representatives from individual hospitals within a health system can be tasked with promoting and enforcing the organization's patient education governance policy within their specialty or service line. While this model gives departments the flexibility to consider their patients' unique needs when developing patient education, it does so at the cost of centralized control and consistency across the organization.

A third approach would be to combine the two. Start the process with the department, specialty, service line or hospital and then have their recommendations submitted to a centralized committee for review.

Patient Education Requests and Tracking Process

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It is imperative that patient education undergoes regular review to check medical accuracy and to update current evidence-based treatment(s) and risk information. To accomplish that, a designated department representative or participant in the committee should be responsible for tracking each piece of custom patient education, including author and date of most recent review/revision.

This same person or another designee should be tasked with tracking new patient education requests and enforcing compliance with the patient education governance policy. Request types include: customizing existing patient education, updating clinical guidelines/procedures, correcting medical errors, developing new topics, and updating the patient education policy itself.

