

Preparing patients for their appointments

Why is supporting patients to be prepared important?

Preparing patients to get the most out of their conversations with health professionals has always been important, but it is especially important now due to COVID-19. The 2012 White Paper, “Liberating the NHS: No decision about me without me” stressed the importance of prepared, informed patients and there have been several similar policy initiatives since.

However, the importance of this approach has been thrown into sharp relief by the Coronavirus pandemic which will have far reaching future implications, especially with regard to the recovery, restoration and maintenance of non-Covid-19 health services. This requires making full use of the capacity available, regular review of patients on waiting lists and prioritising available resources. These activities are supported by embedding optimal shared decision-making conversations with patients about future treatment needs into every pathway.

The Making Good Decisions in Collaboration programme (<https://www.health.org.uk/publications/the-magic-programme-evaluation>) highlighted patient preparation as one of the key aspects of optimal Shared Decision Making. This is particularly true when difficult and complex decisions need to be made. There is an emerging understanding that this is an area which patients are finding extremely difficult in the context of COVID-19. As a result, services are experiencing lower attendance figures, increased DNAs/cancelled appointments, missed (often urgent) treatments and an increase in patients presenting late with advanced symptoms. There has also been an increase in patients simply not seeking help in the first place but presenting in as an urgent/emergency case at a later point.

As a result, there is an acute need to ensure patients are prepared to meaningfully engage in evidence based conversations about the risks, benefits and alternatives to the treatment options. This is particularly important for those patients who experience socio-economic and/or health inequalities and may be among the 43-61% of English working age adults who routinely do not understand health information. For this group it is vital that meaningful engagement means that information is provided for them, that takes account of their lower level of health literacy.

What is a prepared patient?

Prepared patients feel confident, empowered and have the skills to actively participate, as far as they want to in conversations, planning and decisions about their health and care. For this to happen, they need to be informed about:

- Their legal rights, including consent as per the GMC Consent Guidelines of November 2020
- The importance of asking questions, including reassurance that this is welcomed
- The process of the planning or decision making they are involved in
- The importance and benefit, of taking the time to think and reflect in advance of their appointment, about what matters to them in preparation for their conversation.

In addition, it is important that all patients know in advance of their appointment that their clinician will want to discuss all the available options, including their benefits, risk and reasonable alternatives, that will help them make a decision about their care or develop a plan. This needs to be presented in a way that meets their specific health literacy and cultural needs.

How can local systems support patients to prepare for Shared Decision Making conversations/consultations/meetings?

1. Patients are encouraged to prepare for a Shared Decision Making conversation with their clinician about their treatment. *(Please see the following link for guidance: <https://www.england.nhs.uk/shared-decision-making/guidance-and-resources/>)*

The following are some examples of how to help patients prepare for consultations:

- Providing a variety of health literate material which prompts them to consider key questions about the conversation (e.g. It's OK to Ask, BRAN, Ask Me 3 etc.)
- Emphasising in any correspondence/preparation material that asking questions is actively encouraged and welcome
- Encouraging them to ask further questions if they are unsure or need more information and to consider involving a friend or family member who can support them
- Reminding them of how to access translation, advocacy and other support, including different formats, as required by the Accessible Information Standard (<https://www.england.nhs.uk/ourwork/accessibleinfo>)
- Ensuring that all correspondence about the importance of preparation is health literate and, in particular, meets the needs of people with lower levels of health literacy. This link will take you to the national health literacy toolkit (<https://www.hee.nhs.uk/our-work/population-health/training-educational-resources>)
- Asking them to think about some of the things that matter to them in advance e.g. what makes a good day or a bad day, important routines they would like to maintain as well as the people and things that are important to them
- Running an ongoing What Matters to You campaign so that staff understand the importance attached to patients asking questions

These examples are summarised in the [Getting Ready to Talk about Our Health](#) infographic, which can be sent to/shared with patients.

2. Patients are informed of their constitutional and legal rights to Choice *(please see the following link for more information: <https://www.england.nhs.uk/patient-choice/elective-care/choice-materials/>)*
3. All organisations ensure that advice for patients on preparing for appointments/treatment is accessible in a number of different formats, as per the Accessible Information Standard, and functional for people at all levels of health literacy - *e.g. people can understand it and act on it when action is required or a decision needs to be made*
4. Patients are supported to understand all the risks and benefits of going ahead with, cancelling or delaying their procedure when making their decisions. If they decide to not go ahead, they are given an opportunity to develop a personalised care and support plan to discuss and record how they will manage their condition going forward
5. Patients are informed of the impact that the Covid-19 pandemic may have on their appointment, and are given the opportunity to ask questions about this, including:
 - a. Potential disruption or delay to treatment

- b. Risk of contracting Covid-19
 - c. Preparations they must make before their operation (e.g. *you may be asked to have a Covid-19 test, isolation of household members, disclosure of household members with symptoms, no travel by public transport etc.*)
 - d. Risks to their household members of attending an appointment in person
 - e. Precautions the service is taking to ensure patient safety during their procedure (e.g. *staff wearing PPE etc.*)
 - f. Guidance to improve their recovery and ensure their safety in the community
 - g. A clear statement that if guidance around preparations are not followed, this may lead to the delay or cancellation of their procedure in the interests of safety
 - h. That if there is a local rise in infections of Covid-19, there is the risk of further delay to their procedure
 - i. Restrictions on being accompanied to their appointment and on visitors whilst in hospital
6. Trusts follow local policies to understand the impacts of the safety precautions on patients, and seek to mitigate them directly where possible to avoid introducing/exacerbating health inequalities e.g. a patient can't travel by car privately then consider local patient transport policies or if a patient is isolating, what support is available from local partners and the VCSE sector e.g. social prescribing link workers
 7. The option of different consultation methods e.g. virtual and face-to-face, should be available routinely to support the patient's preferences, circumstances and needs, where this is clinically appropriate and will facilitate a better-quality conversation
 8. Patients are encouraged to complete a [Personalised Wellbeing Plan](#) or review their existing Personalised Care & Support Plan, to help them manage their health and wellbeing whilst they are waiting for further tests, appointments or treatment.

In summary, an optimal approach to patient preparation will develop a culture that will:

- Be mindful of health literacy, cultural sensitivities and the accessibility of information for patients so that they fully understand the implications of their decision
- consider health inequalities
- welcome and encourage questions and queries
- Identify where the opportunities for preparing patients exist and making best use of them e.g. information that is sent out with appointment letters, posters in clinics and general waiting areas as well as using a range of local and social media to ensure that as many people as possible are made aware of this approach
- Make full use of the capacity and resources of the service/organisation.