

Creating a Tool to Evaluate Patient Performance

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- Checklists • Rubrics

Patient education is a critical component of the nurse-patient relationship and an integral part of any hospitalization or clinic visit, so much so that patient education has been identified as a fundamental patient right.^{1,2} Patients want to actively participate in their own health care, and to do so effectively, patients must understand their diagnosis, prognosis, and treatment options. In addition, many patients and family members of patients return home with an expectation that information has been sufficiently taught to manage the health care demands of the patient. It is the responsibility of the health care team, and most frequently nurses, to ensure that the appropriate information has been given and that effective patient education has occurred. To determine the extent to which the patient can perform new skills to manage the nuances of treatment at home, a process of evaluation is essential.

One method that ensures some level of consistency in patient education as it relates to performance, and provides a system of documentation that the patient has achieved mastery of the new skill, is a performance evaluation tool. There is little empirical nursing research related to the reliability and validity of evaluation tools, including tools designed to measure patient education outcomes.³ A comprehensive and appropriate evaluation tool is 1 component of an evaluation process. **Table 1** provides an overview of essential elements that are necessary in any evaluation process. Before a teaching session occurs, the elements described in **Table 1** should be considered to validate that learning has occurred. This strategy makes sure to answer the age-old question, "Can one say teaching has occurred, if there is no

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Table 1
The rights of patient education evaluation

Right	Questions to Consider	Explanation
The right patient	What is the level of the patient's understanding of what is to be taught? Is the patient ready to be evaluated? What preexisting knowledge does the patient have? What motivates the patient? What are the patient's values related to what has been taught?	Although it might seem obvious, a patient is not their diagnosis. Teaching styles should be geared toward meeting the patient's needs. To evaluate the extent of patient learning, the patient must be ready to be evaluated, care about what has been taught, and perceive meaning about what has been taught for their life. Without these elements, there is no point in evaluating the patient.
The right time	Has the patient been taught what is expected? Has the patient displayed some level of understanding of the content that has been taught? Is it too soon to expect the patient to incorporate what has been taught into their day-to-day existence?	Not everyone learns at the same pace. Some people may have some barriers to learning that are physical, socioeconomic, emotional, or cultural. There needs to be time to identify these potential barriers and address these. Has there been enough time for the patient to assimilate what has been taught to a point that the patient can show skill, discuss concepts, or provide information that forms the basis of the evaluation?
The right tool	What aid or tool is being used to evaluate the patient? Is the tool that is evaluating performance an appropriate tool? Is the tool used to evaluate knowledge an appropriate tool? Does the tool correlate with the learning objectives or outcomes?	The tool that is used for the evaluation must be appropriate and must reflect the learning outcomes or educational objectives. Tools that are incongruent to teaching objectives and outcomes are of limited use in evaluating the extent to which the patient has achieved the objectives or outcomes. Nurses must have knowledge of the types of tools and the level of appraisal inherent in tools.
The right audience	For whom is the evaluation being performed? Is it being performed to satisfy regulatory requirements? Is it being performed to provide evidence for reimbursement? Is it being performed so that other nurses involved in teaching can provide continuity in meeting goals and objectives? Who are the stakeholders in the evaluation data? Who will see the evaluation data and make decisions about the patient?	Frequently, the real audience for whom the evaluation is intended is not the patient. The evaluation process provides internal evidence to interested parties as to the extent the patient has mastered the content, or skills related to what has been taught. Potential audiences include reimbursement agencies requiring documentation that the patient has met the educational goals or outcomes, other nurses involved in the teaching at different levels, or at different times, or regulatory agencies wanting explicit documentation.

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