AARC Clinical Practice Guideline

Training the Health-Care Professional for the Role of Patient and Caregiver Educator

THCP 1.0 PROCEDURE:

The process of enabling the health-care provider (HCP) to facilitate the patient and/or caregiver's acquisition of knowledge, skills, understanding, and positive attitudes related to the patient's medical condition and its management.

THCP 2.0 DESCRIPTION/DEFINATION:

2.1 The process of training the HCP as patient and/or caregiver educator includes addressing and assuring adequate knowledge, skills, and attitude mastery for patient rapport and affective teaching.(1) (HCP is defined as any health-care professional involved in the care of the patient).

2.2 The ultimate goal of the process is to provide education to the patient and/or caregiver that equips him/her with the knowledge, skills, and attitudes to better understand the patient's condition and to more fully participate in health care. (The caregiver is defined as any person who plays a significant role in the patient's life. This includes individuals who may not be legally related to the patient). This allows a cooperative effort between the health-care provider and patient.(1,2)

THCP 3.0 SETTING:

Any location in which HCPs participate in or can be prepared for patient and/or caregiver education and in which resources are available, including, but not limited to:

3.1 acute care hospitals;
3.2 outpatient treatment or rehabilitation centers;
3.3 physicians' offices;
3.4 extended care or skilled nursing facilities or the patient's home;
3.5 educational seminars, workshops, and symposia;
3.6 postsecondary technical schools, colleges, and universities.

THCP 4.0 INDICATIONS
4.1 The presence of HCPs who must participate in education of patients and caregivers who need:
4.1.1 knowledge concerning condition or care;(1)
4.1.2 skills to participate effectively in care;(1)
4.1.3 proper attitude or motivation to participate effectively in care.(3)

4.2 Evidence that the knowledge, skills, or attitudes of HCPs are inadequate to convey the necessary information or demonstrate skills to patients, including evidence of:
4.2.1 lack of knowledge of effective educational principles and practices specific to patient's or caregiver's age and development;(2,4-9)
4.2.2 inability to accurately assess patient's or caregiver's educational needs;(2,7)
4.2.3 inability to prepare educational objectives and establish instructional goals;(1,7,10)
4.2.4 lack of knowledge of education methods to accomplish objectives and meet goals;
4.2.5 inability to prepare patient or caregiver education materials;(11-13)
4.2.6 inability to offer supervised practice of skills;
4.2.7 inability to assess outcomes of patient or caregiver education;(2)
4.2.8 inability to appropriately offer feedback to patient or caregiver;(14,15)
4.2.9 inability to modify educational efforts as the result of learning outcome assessment and feedback from patients.(5,6,10)

**THCP 5.0 CONTRAINDICATIONS:**

There are no contraindications to HCP training to offer patient and/or caregiver education when a need exists.

**THCP 6.0 HAZARDS/COMPPLICATIONS:**

Inadequate training of the HCP can lead to harm to the patient or result in the patient's inability to participate in his/her health-care management.

**THCP 7.0 LIMITATIONS OF METHOD:**

The effectiveness of educating the HCP to offer patient and/or caregiver education may be limited by:
7.1 Limitations in the HCP:
7.1.1 unreceptive or incapable HCP;(2,6,7)
7.1.2 lack of educational preparation;(2,7)
7.1.3 absence of interdisciplinary cooperation;(2)
7.1.4 inability to deal with age or development-specific learning patterns;(2)
7.1.5 inadequate knowledge of cultural or religious practice that may affect educational process;(2)
7.1.6 inability of HCP to communicate effectively.
7.2 System limitations:
7.2.1 inadequate time to prepare the HCP due to other patient care responsibilities;
7.2.2 inadequate space, energy, or financial resources;
7.2.3 insufficient or unavailable faculty and preceptors for HCP training program;
7.2.4 inconsistency in information provided to the HCP;
7.3 Limitations in the patient or caregiver:
7.3.1 absolute refusal to participate in education;
7.3.2 lack of positive attitude or motivation to participate;(5,6,16)
7.3.3 lack of basic education necessary to benefit from instruction;(5,8,10)
7.3.4 perception of cultural conflict or presence of a language barrier.(2)

THCP 8.0 ASSESSMENT OF NEED

All HCPs who have patient care contact and opportunity to provide patient and/or caregiver education should be assessed for training as education providers(2) by
8.1 observation of HCP in patient education setting to determine if needed skills are present;
8.2 verbal questioning by specialist as to knowledge of topics being taught.

THCP 9.0 ASSESSMENT OF OUTCOME:

9.1 Evidence by HCP evaluations that the training has met the goals and objectives for preparing patient and/or caregiver educators:
9.1.1 verbal or written evaluation;
9.1.2 observation of HCP in teaching setting.
9.2 The desired outcome of training the HCP as a provider of patient and/or caregiver education is also assessed by meeting the goals of patient and/or caregiver education:
9.2.1 knowledge gained by the patient or patient care provider;(10)
9.2.2 skills mastered by the patient or the patient care provider;(2,14)
9.2.3 positive change in patient outlook and/or attitude;(6)
9.2.4 compliance of patient or caregiver in following the care plan.
9.3 Long-term assessment through departmental or institutional continuous quality improvement indicators or other quality monitoring
system.

**THCP 10.0 RESOURCES:**

10.1 Written materials  
10.2 Audiovisual materials  
10.3 Anatomic models, mannequins, patient care equipment  
10.4 Computer and software  
10.5 "Appendix--Essentials of the Teaching Process" in Clinical Practice Guideline "Providing Patient and Caregiver Education"(17)  
10.6 Personnel  
10.6.1 Education specialists with training in patient education  
10.6.2 Training specialists in general adult education  
10.7 Education seminars and clinical seminars with emphasis in patient education  
10.8 Formal 'for-credit' patient and adult education courses provided by postsecondary institutions of learning

**THCP 11.0 MONITORING**

11.1 The monitoring of the process of training the HCP as educator of the patient and/or patient care provider should include evidence of:  
11.1.1 classes and inservice training for HCPs as educators;  
11.1.2 availability of written and audiovisual materials, computers, and software for use with computers for training HCP as educators;  
11.1.3 HCP evaluation of training effectiveness.  
11.2 Patient and caregiver education directed at meeting the goals and objectives of the education plan

**THCP 12.0 FREQUENCY:**

12.1 Spontaneous: as often as the HCP has contact with patients or caregivers requiring education for which the HCP is not prepared. (This should take place outside of patient care area.)  
12.2 Scheduled: a formal HCP-as-educator training program. (This may be included in orientation or as a skills laboratory at least once per year.)  
12.3 As available: training programs offered by external sources such as professional associations and accrediting agencies.

**THCP 13.0 INFECTION CONTROL:**

The presence of transmissible infection and/or the presence of compromised immunity in the patient should be taken into consideration when patient and/or caregiver education is undertaken. Appropriate steps to protect patient, caregiver, health-care provider, and trainer should be included in the education plan.

*Pulmonary Rehabilitation Focus Group:*
REFERENCES


ADDITIONAL BIBLIOGRAPHY
• Cross, KP. Adults as learners. San Francisco: Jossey-Bass, 1981.

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