

Suggested Task Chart for Facility Preparation

Task Chart for Facility Preparation			
Area #1 Organizational Approval and Awareness			
STEP 1 When: WEEK ONE (enter date this is done: _____)			
What to Do	Notes / Comments / Follow-ups		
<p>Find out who the staff person is who supports the following committee meetings. Get the contact info for each one:</p> <ul style="list-style-type: none"> ~ Patient Safety Committee ~ Medical Staff Committee ~ Nursing Practice Council ~ Quality Improvement Council ~ Board of Directors ~ Other? <p>NOTE: Not all committees will need to approve this initiative; however, they will usually benefit from a presentation that provides the information about this initiative so they can support it. Seek guidance from your administrative team to determine at which meetings this needs to be presented.</p>	Committee	Name	E-mail/ext.
	Patient Safety Comm.		
	Medical Staff Comm.		
	Nursing Practice Council		
	Quality Improvement Council		
	Board of Directors		
	Other		
	Other		
	Other		
STEP 2 When: WEEK ONE			
What to Do	Notes / Comments / Follow-ups		
<p>Find out when the next meetings are and get on the agenda to present the initiative for the purpose of acquiring approval or conveying information.</p> <p>NOTE: Not all committees will need to approve this initiative; however, they will usually benefit from a presentation that provides the information about this initiative so they can support it. This is equally important and should be considered a priority as well.</p>	Committee	Date of Next Meeting	On Agenda? (Y / N)
	Patient Safety Comm.		
	Medical Staff Comm.		
	Nursing Practice Council		
	Quality Improvement Council		
	Board of Directors		
	Other		
	Other		
	Other		

“Bandíng Together for Patient Safety”

Task Chart for Facility Preparation

Area #1 Organizational Approval and Awareness continued

STEP 3 When: Pending Committee Approvals

What to Do	Notes / Comments / Follow-ups		
<p>After presentations are made and approval obtained to adopt recommendations, contact pertinent dept./staff to move forward.</p> <p>Convey info – see right column.</p>	Dept.	Info to be Conveyed	Follow-ups
	Materials Management	<ol style="list-style-type: none"> Approvals obtained. OK to order wristbands. When will bands be available? Take that date and add 5-7 more days – that is your “Go Live” date. (The 5-7 more days are added to allow for distribution of wristbands to pertinent areas.) 	<p>How long until delivery?</p>
	Staff Education	<ol style="list-style-type: none"> Wristbands will be arriving in about _____ weeks. “Go Live” date is _____ weeks. OK to start education. 	
	Risk Management and/or QI Director	<ol style="list-style-type: none"> Wristbands will be arriving in about _____ weeks. “Go Live” date is _____ weeks. Confirm P&P has been approved and prepare to add to P&P manual. 	
<p>Other departments to consider:</p> <p>Medical Staff, Admitting, ED, Peri-Op, Nursing, Lab, Dietary, Laboratory, Radiology, Pharmacy, etc.</p>	<ol style="list-style-type: none"> Wristbands will be arriving in about _____ weeks. “Go Live” date is _____ weeks. OK to start education. Coordinate with Education Department for either materials/training/or information. 		

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Task Chart for Facility Preparation

Area #1 Organizational Approval and Awareness continued

STEP 4 If any other steps required, add them here.

What to Do	Notes / Comments / Follow-ups

STEP 5 If any other steps required, add them here.

What to Do	Notes / Comments / Follow-ups

STEP 6 If any other steps required, add them here.

What to Do	Notes / Comments / Follow-ups

“Bandíng Together for Patient Safety”

Task Chart for Facility Preparation

Area #2 Supplies Assessment and Purchase

STEP 1 When: WEEK ONE (enter date this is done: _____)

What to Do	Other Notes / Cues
<p>Contact Materials Management staff (MM) and brief them on the initiative. Answer questions and share the tool kit.</p> <p>Remember: You are just gathering information. Do not order wristbands until organizational approval has been obtained.</p>	<p>Coordinated with MM who will do the ordering.</p> <p>MM Name: _____</p> <p>E-mail: _____</p> <p>Phone: _____</p>

STEP 2 When: WEEK TWO

What to Do	Other Notes / Cues
<p>Ask MM when current supply of wristbands will run out. This is based on estimates from typical order patterns and staff usage.</p>	<p>Allergy Bands run out about _____ (ex: mid-Jan. 09)</p> <p>Fall Bands run out about _____</p> <p>DNR Bands run out about _____</p>

STEP 3 When: WEEK TWO

What to Do	Other Notes / Cues
<p>Ask MM to contact wristband vendor and alert the vendor to change in supply color. Convey info to the right. Check off items once communicated to vendor.</p>	<p>ALLERGY BAND:</p> <p><input type="checkbox"/> Red: PMS 1788</p> <p><input type="checkbox"/> "Allergy" pre-printed on band in black – 48 pt. Arial Bold, all caps</p> <p>FALL BAND:</p> <p><input type="checkbox"/> Yellow: PMS 102</p> <p><input type="checkbox"/> "FALL RISK" pre-printed on band in black – 48 pt. Arial Bold, all caps</p> <p>DNR BAND:</p> <p><input type="checkbox"/> Purple: PMS 254</p> <p><input type="checkbox"/> "DNR" pre-printed on band in white – 48 pt. Arial Bold, all caps</p>

STEP 4 When: WEEK TWO

What to Do	Other Notes / Cues
<p>Follow up with MM in a week and validate that they were able to contact vendor.</p> <p>Complete info in right column from MM.</p>	<p>Lead time required when ordering wristbands is:</p> <p>ALLERGY BAND: _____ weeks</p> <p>FALL BAND: _____ weeks</p> <p>DNR BAND: _____ weeks</p>

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Task Chart for Facility Preparation

Area #2 Supplies Assessment and Purchase continued

STEP 5

What to Do	When to Do It	Other Notes / Cues
Assure MM that you will contact them to order wristbands once organizational approval has been obtained and P&P changes have been approved.	Give status report within a month of initial contact so MM knows this is still being worked on.	

STEP 6 If any other steps required, add them here.

What to Do	When to Do It	Other Notes / Cues

STEP 7 If any other steps required, add them here.

What to Do	When to Do It	Other Notes / Cues

STEP 8 If any other steps required, add them here.

What to Do	When to Do It	Other Notes / Cues

Task Chart for Facility Preparation

Area #3 Hospital-Specific Documentation

STEP 1 When: **WEEK TWO** or **THREE** (enter date this is done: _____)

What to Do	Other Notes and Cues
<p>Contact the chief nursing officer (CNO) and clinical directors to review if documentation records contain specific information about wristbands, such as daily nursing charting.</p> <p>Remember: This is not a recommendation to add “wristbands” to your documentation process or color-specific information, but to review your current documents/process.</p>	<p>Coordinate with CNO and clinical directors.</p> <p>It may be helpful or more efficient for you to pull the daily documentation information for the various areas and review the current requirement. Consider these documents:</p> <ul style="list-style-type: none"> ED triage record or treatment/ED nurses’ notes Admitting assessment ICU nurses’ notes Peri-Op assessments/notes Daily nursing documentation <p>Other: _____</p>

STEP 2 When: **WEEK TWO** or **THREE**

What to Do	Other Notes and Cues
<p>If your current documentation addresses wristband information, review documents to assure any references to colors are updated to reflect these changes.</p>	<p>Again, this is not a recommendation that the documentation reflect color information about wristbands. However, if your documentation is color-specific, this is a cue to validate that the information be updated to reflect the new colors – if that is your current process.</p>

STEP 3 When: **WEEK THREE** or **FOUR**

What to Do	Other Notes and Cues
<p>If changes are required to the documentation forms, contact the Forms or Documentation Committee and pertinent clinical directors and initiate process for changes.</p>	<p>Some organizations require that any changes to forms be reviewed through a Forms or Documentation Committee or similar entity. Other organizations do not require this process if the information being changed is minimal and does not change “content.” This step is to determine your organization’s process.</p>

STEP 4 When: **WEEK THREE** or **FOUR**

What to Do	Other Notes and Cues
<p>Once process is known, and if a form(s) update is required, factor the print time and new form availability into the timeline so the education and implementation processes are in sync with the arrival of new documents.</p>	

Task Chart for Facility Preparation

Area #3 Hospital-Specific Documentation continued

STEP 5 When: WEEK FOUR

What to Do	Other Notes and Cues
<p>The P&P for wristband application needs to be reviewed and updated to reflect the new process.</p> <p>Obtain a copy of the current wristband P&P and review content.</p>	<p>A sample P&P has been provided for you to use as a template. Review this sample and adopt its content as it makes sense in your organization.</p> <p>NOTE: It is important that you compare your current process with the sample P&P and determine what elements you will change. The sample P&P is not prescriptive but rather suggestive.</p>

STEP 6 When: WEEK FOUR

What to Do	Other Notes and Cues
<p>Some banding processes may vary slightly within the organization given the area of care and its unique needs, such as ED, peri-operative, radiology, L&D, etc. You will want to contact the directors of each of these areas and ask if they have their own P&P for banding a patient, or do they use the facility-wide P&P. If they have a unique P&P, obtain a copy of it so you can compare its content with the facility-wide P&P.</p> <p>Review with each area that has a unique P&P its current P&P and the proposed changes.</p>	<p>Contact ED Director. Name/ext: _____</p> <p>Unique P&P? No _____ Yes _____ (obtain copy)</p> <p>Contact Peri-Op Director. Name/ext: _____</p> <p>Unique P&P? No _____ Yes _____ (obtain copy)</p> <p>Contact Radiology Director. Name/ext: _____</p> <p>Unique P&P? No _____ Yes _____ (obtain copy)</p> <p>Contact L&D Director. Name/ext: _____</p> <p>Unique P&P? No _____ Yes _____ (obtain copy)</p> <p>Contact "other" Director. Name/ext: _____</p> <p>Unique P&P? No _____ Yes _____ (obtain copy)</p> <p>Contact "other" Director. Name/ext: _____</p> <p>Unique P&P? No _____ Yes _____ (obtain copy)</p>

STEP 7

What to Do	Other Notes and Cues
<p>Get this item on P&P committee agenda and have approval for the changes.</p> <p>Coordinate this with the departments that have "unique" P&Ps so all are changed at the same time.</p>	<p>P&P Committee Contact/ext. _____</p> <p>Date/Month on P&P Committee _____</p> <p>Communicate the P&P Committee date to other pertinent directors so the proposed changes are reviewed and agreed upon before P&P Committee date.</p>

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Task Chart for Facility Preparation

Area #3 Hospital-Specific Documentation continued

STEP 8 If any other steps required, add them here.

What to Do	Other Notes and Cues

STEP 9 If any other steps required, add them here.

What to Do	Other Notes and Cues

STEP 10 If any other steps required, add them here.

What to Do	Other Notes and Cues

Task Chart for Staff/Patient Education

Area #4 Staff and Patient Education

STEP 1 When: TWO to THREE WEEKS

What to Do

Familiarize yourself with training content and the tools (FAQs, brochures, posters, and more).

Other Notes and Cues

Review the contents of the education session in this tool kit. This is important because as discussions occur about who will do what, you can inform directors about the tools that are available for staff to use. Because the education section is so comprehensive, some may opt to participate in the facilitation process. By giving the directors all of the information about the tools and training section in this manual, they can make a better and informed decision.

STEP 2 When: TWO to THREE WEEKS

What to Do

Determine the education format by discussing with the Education Department and clinical directors. By education format, we refer to the way the education is going to be managed – at the unit-specific level or in a general session where multiple departments are present. Also, is the education going to be facilitated through the department-specific directors or Education Department?

It is important to consider all of the stakeholders: physicians, dietary, pharmacy, therapies, radiology, peri-op, ED, L&D, housekeeping, etc. The column on the right is a tool that you will need for all of the stakeholders. Use the back of this page if more room is needed.

Other Notes and Cues

Education Dept. preferences are: ____ Unit-Specific ____ General session

____ Other (explain _____)

Facilitator Preferences: ____ Unit-Based ____ Educ. Dept.

Critical Care Dir. preferences are: ____ Unit-Specific ____ General session

____ Other (explain _____)

Facilitator Preferences: ____ Unit-Based ____ Educ. Dept.

Med / Surg Dir. preferences are: ____ Unit-Specific ____ General session

____ Other (explain _____)

Facilitator Preferences: ____ Unit-Based ____ Educ. Dept.

Pharmacy Dir. preferences are: ____ Unit-Specific ____ General session

____ Other (explain _____)

STEP 3 When: THREE to FOUR WEEKS

What to Do

Obtain the names of the trainers and send an e-mail advising of an upcoming Train the Trainer session. This meeting should be no longer than 45 minutes to one hour. Schedule this about one month out to accommodate already full schedules.

Other Notes and Cues

Whether training occurs at a unit-based level or in a general session, a Train the Trainer session ought to be considered so the education materials and training tips can be viewed by all.

Task Chart for Staff/Patient Education

Area #4 Staff and Patient Education continued

STEP 4 When: **THREE to FOUR WEEKS**

What to Do	Other Notes and Cues
Find out the name of the chair of the Patient/Community Education Committee. Contact that person and schedule appointment to review the patient brochure. If necessary, get on the agenda of the next committee meeting to get approval for the brochure to be used.	Another component to the education section is the patient education. Most organizations have a Patient/Community Education Committee that reviews education materials before they can be given to patients.

STEP 5 When: **TWO WEEKS before Train the Trainer Session**

What to Do	Other Notes and Cues
Make one copy of the education section of this tool kit for each trainer so each has a set of materials. Don't forget about the PowerPoint presentation, too. Some organizations may want to put the PowerPoint on a shared drive, while others may want to burn a copy of the CD.	Updates will be occurring to this tool kit as new information is added or great suggestions are made by the users. Be sure to visit the Web site where the tool kit is posted and check for any updates before you make all of the copies of materials. Go to www.NCQualityCenter.org/ccw.lasso . Click on the "Resources" header at the top of the page.

STEP 6 When: **THREE WEEKS before Staff Education Rollout**

What to Do	Other Notes and Cues
Send out a reminder e-mail to all trainers reminding them to make copies of the following handouts for their staff: ~ Staff education brochure ~ Patient education brochure ~ FAQs ~ Posters announcing the meeting (there are three to choose from) ~ Sign-in sheet ~ Competency checklist (if you are using that)	It may be useful to obtain the actual wristbands to show staff exactly what they look like. Also, try to incorporate some fun into this by using purple, red, and yellow "props" or candy – like M&Ms, Skittles, or other such things.

STEP 7 If any other steps required, add them here.

What to Do	Other Notes and Cues