



Patient Education Evaluation Checklist

This tool will help you choose a patient education/engagement program. Save the responses in the grid below to simplify your evaluation process.

Rate each response on a 1-4 scale for a maximum total of 44 points.

(4 = Exceeds expectations 3 = Satisfies expectations 2 = Partially satisfies expectations 1 = Does not satisfy expectations)

	Questions to Ask Your Patient Educator Vendor	Notes	Rating
Clinical Experience Questions	<p>1. To what extent does your patient education platform help my clinicians deliver consistent information at every care setting across my organization? Value-based care models emphasize patient outcomes. To improve outcomes, clinicians across disciplines and care settings must empower patients at every step of their care journeys with consistent, standardized educational content. Your vendor should unify the patient education experience across the entire health system. Be sure information and workflow are consistent across clinical settings (e.g., acute/ambulatory), clinical providers (e.g., MDs/RNs), and media types (e.g., text/video).</p>		
	<p>2. To what degree do you offer reference and decision support tools not just for patients, but also for doctors, pharmacists, nurses, and allied health professionals? Patient handouts, videos, and other educational materials should be built from the same single source of trusted evidence that clinicians use for their own decision-making to ensure consistency between what clinicians say and do, and what patients read or hear in the education they receive.</p>		
	<p>3. Does your platform have the capability to automatically assign educational content based on EHR data? A cloud-based patient education platform should permit auto-share functionality. By automating the assignment of specific education to select patients, you can create a zero-click workflow for your clinicians.</p>		
	<p>4. How does your platform integrate patient education into existing EHR workflows? Clinicians should be able to find and assign relevant education easily within their EHR workflows. Assignment should be the same for ambulatory and acute workflows, as well as for handouts and video content. Your vendor should enable fast access to clinicians' preferred materials via "favorites" lists, as well as to your health system's custom content, all embedded within the existing EHR workflow.</p>		
	<p>5. How easily will my clinicians be able to efficiently find the most relevant educational content for each patient? Education recommendations often are based on patient information that may not be relevant to the current encounter. Platforms that meaningfully employ SMART on FHIR standards to hyper-personalize suggestions using more than just age, gender, and ICD-10 codes can give clinicians quick access to educational materials appropriate to the clinical situation at hand. Content recommendations can be prioritized based on the patient's current visit, conditions, medications, and procedures.</p>		
	<p>6. How will your platform ensure my clinicians can offer the latest evidence-based patient education? Clinical evidence and information change rapidly, making it crucial that patient education be continuously updated as evidence evolves. You should look for comprehensive, high-quality, evidence-based information from reliable and trusted sources. Is the content designed to help you achieve Joint Commission accreditations, for example? Check to see how often content is reviewed and updated. Do you have to wait for quarterly releases, or will you get updates in real time? Keep in mind that a cloud-based platform should limit the burden on IT resources through automated content updates that eliminate the need for manual uploads.</p>		

Questions to Ask Your Patient Educator Vendor		Notes	Rating
Patient Experience Questions	<p>7. In what ways are educational materials tailored to each patient's unique preferences, health literacy level, and care journey? Empowering patients to make informed health decisions requires education that is easily understood, accurate, and personalized. Consider what makes content meaningful and learner-centered. It should follow plain language principles, as well as be specific to the patient's stage in their care journey, in the user's preferred language, at an appropriate reading level for the user's health literacy, and in the user's preferred format and learning style—such as reading written content, or watching/listening to video content.</p>		
	<p>8. Can patients access educational content through multiple modalities, optimized for their preferred devices? Patients today expect their clinicians to provide information optimized for their preferred devices. Your vendor should accommodate a variety of digital delivery methods, including via patient portal and SMS text messaging. Handouts and videos alike should be easily accessible through one centralized place in the patient portal, or through SMS text messages on patients' smartphones.</p>		
	<p>9. What flexibility can your patient education platform provide to meet the learning needs of both patients and their caregivers? Not only do patients have diverse learning preferences, but their caregivers may have different learning needs as well. Users should be able to change the language, font size, captions, and other aspects of assigned education quickly and easily. Meeting the varying needs of patients and caregivers supports health literacy initiatives and enhances the patient experience and outcomes.</p>		
Analytics & Reporting Questions	<p>10. Will we have organization-wide visibility into how patients interact with our educational materials? A deep understanding of how patients and clinicians interact with your educational materials is necessary to achieve desired patient engagement levels. Therefore, it is difficult to measure the impact of a patient education program without detailed reporting and analytics. Make sure administrators can closely track patient education assignment, usage, and completion data at the organizational level.</p>		
	<p>11. Can my clinicians tell which educational materials are being used by their patients, and which ones are not? A patient education platform should show clinicians when education has been assigned to a patient by clinicians across the health system. It should also give clinicians visibility into which education was actually read or watched. Data and analytics that track how patients interact with education materials—including what they use and what they like—can help clinicians adjust education as needed for optimal impact on the patient experience and patient outcomes.</p>		

For help or to learn more about patient education, please contact us at elsevier.com/patientpass