





**Diane Marriott, DrPH**  
**University of Michigan**  
**Director, Multipayer Primary Care Initiatives and CPC+ Michigan**  
**Statewide Convener**

[dbechel@umich.edu](mailto:dbechel@umich.edu) 734-740-0511

- ▼ *This PPT is part of the Michigan Multipayer Initiatives toolkit series and is intended as a quick start guide for practices and clinics to provide practices with information to convert their in-person Patient and Family Advisory Councils (PFACs) to virtual or phone meetings for a period of time as we deal with patient needs as we face the challenge of the novel coronavirus. For more information about this guide, please contact Diane Marriott ([dbechel@umich.edu](mailto:dbechel@umich.edu))*
- ▼ ***The goal of the resource is to help practices retain the guidance of the voice of the patient as we face special challenges dealing with the novel coronavirus.***
- ▼ *It is provided in the spirit of advancing work that incorporates the values, needs, and preferences of patients and those that support them into care decisions and design. **It is informational only and should be adapted by practices as they desire to fit their individual needs.***

# Background: What is a Patient and Family Advisory Council (PFAC?)

We will start with a recap of Patient and Family Advisory Councils.

*A **PFAC** is a group of patients, people who support them in their care, and practice team members who collaborate to improve care and health and more fully incorporate patient values, preferences and needs.*

*PFACs can help practices to:*

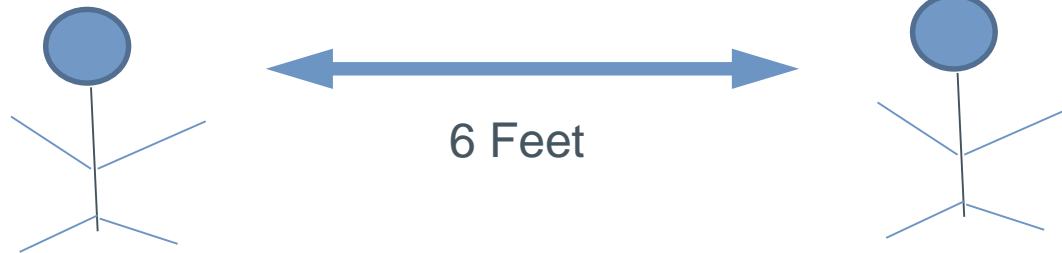
- Get feedback on new scripts, surveys or processes under consideration*
- Help the practice to overcome challenges related to low patient response or receptivity (e.g. pre-visit lab orders being filled, etc.)*
- Review practice performance information to address improvement opportunities from the patient perspective*
- And so much more!*

# Conference Call or Webinar Formats as Alternatives to In-Person PFACs

- *For many practices, PFACs are usually conducted in-person to leverage the power of interpersonal communication a shared sense of community as advisers to the practice to inform improvement efforts. PFACs promote practice team members, patients, family members and caregivers coming together to discuss innovation and improvement ideas.*
- *In special times when social distancing is necessary to contain disease, or when members span large geographical areas, in-person meetings are not possible. To retain the voice of the patient, practices may wish to conduct PFACs remotely through conference calls or webinars.*

# Remote PFAC Meetings are Contact-Free

**Not Just**



**But Rather**



# Determining if the Time is Right for Your Practice for Remote PFACs

Before transitioning to remote, contactless PFACs, practices may want to consider:

- Do they have phone numbers and/or email addresses for PFAC members?
- Do they have a conference line and/or webinar platform (e.g., GoToWebinar, Skype, etc.) available to the practice?
- Developing a plan (for what period of time, when to start, expectations of remote meetings) so that it can be messaged to PFAC members about conducting meetings remotely for a period of time.
- Whether the practice has a team member who has experience with conference calls or webinars and can help PFAC members make the transition.

# Regardless of Which Decision Your Practice Makes...

- ▼ **Patients are likely to want to know more about the special challenge at hand in the novel coronavirus.**
- ▼ Whether you decide to convert to remote PFACs or not, if you don't yet have messaging for patients, consider developing it. The [CDC novel coronavirus website](#) is a wonderful place for good and balanced information. (NOTE: On some systems, the link may not automatically open. In this case, right click the link and select "open hyperlink" to view it). **If we do the right things now to mitigate the spread, it will really pay off!**
- ▼ Make sure that the practice team members (both non-clinical and clinical) have this messaging accessible to them. Also make sure that messaging is updated over time and assign someone in the practice with the role of making sure this is done.



# Next Steps if the Time is Right for Your Practice

If your team wants to convert to remote PFACs in the near term:

- Determine which platform (conference call only or webinar with phone call-in) is most accessible and easiest to use for your practice?
  - ◆ Conference calls (phone-only) are usually the easiest option for practices, but must have effective facilitators for them to run well.
  - ◆ Webinars with voice and video are helpful for PFACs with tech-savvy members.
- Think about the framework your practice finds best for remote PFAC meetings and use it to develop a message to PFAC members. Consider:
  - ◆ Why are you converting to remote meetings.
  - ◆ How often will you conduct them.
  - ◆ What members need to participate (e.g., a phone and/or laptop) and how the practice will assist should members need help with technology.
  - ◆ Why their help is important at this special time.
- Determine who in the practice will lead the conversion to remote meetings.
- In your huddle or other regular meeting, make sure everyone in the practice has information about converting to remote PFACs for a period of time
- Develop a message to your PFAC members.

# Converting to Conference Call PFACs: Sample Messaging to Members

If you have a regular PFAC facilitator or lead PFAC member, ask for their support in messaging the transition to PFACs via conference calls. Develop a message to enlist PFAC member participation assess their interest in participating in calls. A sample message might include:

- Hello, this is \_\_\_\_\_ calling from Dr. \_\_\_\_\_'s practice. We have found your participation in our Patient and Family Advisory Councils to be very helpful and as a practice, we think that the voice of the patient is more important now than ever. As a practice we are doing a lot to take care of our patients in this special time and would very much like to continue PFAC meetings, but in a different way.
- Instead of meeting in-person, at least for a period of time, we would like to hold PFAC meetings by conference call. If you have an email address, we can provide agenda and material ahead of time and discuss the group's feedback on the calls.
- We know you might be dealing with a lot now, as well. If you are willing to be on the calls and help, that is great. But if now is not the time for you, and that is fine, too. *What do you think? Would it work for you to participate in conference call PFAC meetings?*
- *Thank you for considering this and most importantly, thank you for always being such a great voice of the patient. There is nothing more important to our team than our patients.*

# Converting to Webinar PFACs: Sample Messaging to Members

If you have a regular PFAC facilitator or lead PFAC member, ask for their support in messaging the transition to PFACs via webinars with voice capability. Develop a message to enlist PFAC member participation assess their interest in participating. A sample message might include:

- Hello, this is \_\_\_\_\_ calling from Dr. \_\_\_\_\_'s practice. We have found your participation in our Patient and Family Advisory Councils to be very helpful and as a practice, we think that the voice of the patient is more important now than ever. As a practice we are doing a lot to take care of our patients in this special time and would very much like to continue PFAC meetings, but in a different way.
- Instead of meeting in-person, at least for a period of time, we would like to hold PFAC meetings by webinar. We can help members who need a little a little help in getting used to webinar platforms. Through email, we can provide agenda and material ahead of time and discuss the group's feedback on the webinars.
- We know you might be dealing with a lot now, as well. If you are willing to be on the webinars and help, that is great. But if now is not the time for you, and that is fine, too. *What do you think? Would it work for you to participate in webinar PFAC meetings?*
- *Thank you for considering this and most importantly, thank you for always being such a great voice of the patient. There is nothing more important to our team than our patients.*

# Converting to Email Input without PFAC Meetings: Sample Messaging to Members

If you have a regular PFAC facilitator or lead PFAC member, ask for their support in messaging the transition to PFACs via email only PFAC member feedback. Develop a message to enlist PFAC member participation assess their interest in participating. A sample message might include:

- Hello, this is \_\_\_\_\_ calling from Dr. \_\_\_\_\_'s practice. We have found your participation in our Patient and Family Advisory Councils to be very helpful and as a practice, we think that the voice of the patient is more important now than ever. As a practice we are doing a lot to take care of our patients in this special time and would very much like to continue PFAC meetings, but in a different way.
- Instead of meeting in-person, at least for a period of time, we would like to use email to get guidance from PFAC members. If you have an email address, we can provide sample draft documents for your review and the timing when we need responses returned. We would like very much to keep your valuable suggestions in mind and this is a helpful way for us to still get your insight until we can return to in-person meetings.
- We know you might be dealing with a lot now, as well. If you are willing to be provide input via email, that is great. But if now is not the time for you, and that is fine, too. *What do you think? Would it work for you to provide input via email on PFAC issue and proposed draft communications to patients?*
- *Thank you for considering this and most importantly, thank you for always being such a great voice of the patient. There is nothing more important to our team than our patients.*

# Best Practices for Remote PFAC Meetings

- ▼ If PFAC members are open to providing input via PFAC conference calls, webinars or email feedback, since any change is a transition for members
  - Call members and use the messaging your practice is feels is best. When the caller is a familiar voice from the practice, it is especially helpful.
  - Follow up with an email with similar messaging. If you have specifics (the conference call number, the webinar platform, the frequency of PFAC remote interaction, etc.), include this as well.
  
- ▼ Make sure that your regular PFAC facilitator has the information that they need and time to think through how to best approach the transition. A well-developed plan that is supported by the practice team is key. Better to spend a little time and have confidence in your plan and messaging.
  
- ▼ If conference calls or webinars are the right option for your practice, develop guidelines for how members will share their verbal feedback. A very helpful way to handle this is to use the “round robin” technique for every question you pose. This involves the PFAC facilitator framing the question or issue, and then calling upon each PFAC member individually (e.g., in alphabetical order, reverse alphabetical order, etc.) to share their thoughts with the group. That way members know when it is their turn to speak and feel less frustrated about making sure their voice is heard. Whatever your method, start each remote PFAC meeting with a recap of the guidelines (e.g., sharing feedback via the round robin technique, putting their phones on mute except when they are speaking, the “raising your hand” and chat functions on webinar platforms, etc.

# Best Practices for Remote PFAC Meetings, cont.

- ▼ Remember that especially in this special time, PFAC members may be more open than ever in trying to help to do their part if it helps the practice team. This may also be a way for PFAC members to feel like they are playing an important role and doing all they can.
- ▼ Pair a tech-savvy team member (if you have one) with the PFAC facilitator to help to make sure that your first few remote meetings go well re: connectivity and PFAC member support. After a few, you will be off and running!
- ▼ If you try as a practice and determine over time, you want to take a pause, that is always an option. Whatever the decision, it is important to keep PFAC members in the loop.
- ▼ Congratulate and thank your PFAC members for their time at the beginning and end of each remote PFAC meeting and include in future meetings how you used the input.

*Remember, this type of collaboration is new for many people so preparation is important for care teams, as well as patients and family members.*

# What Might We Cover in Our First Remote PFAC Meeting?

- ▼ The practice knows best what it will find useful, as always, to incorporate on PFAC agendas. In this special time, you might consider getting input on:
  - Your process for converting in-person care management to remote care management.
  - Messaging to patients about expanded non-face-to-face care options you have put in place.
  - Getting a sense of additional resources or support that patients might need that can be provided in a streamlined way.
  - Enlisting the PFAC's thinking on how the practice can spread the word about the advantages of staying at home, obeying excellent social-distancing if it is necessary to go outside the home, and taking care to appropriately clean surface and wash hands.

# CONGRATULATIONS TO YOU!

Regardless of the decision your practice team makes about PFACs as we deal with the special challenge at hand, how wonderful that you are a practice that has a PFAC in place and that you have considered how and whether they might be helpful to your practice as we face a national challenge.

**Your passion for incorporating the patient voice and commitment to caring speaks volumes.**

Patients appreciate it and the Michigan Multipayer Initiatives Team applauds you!



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