

Engaging patients, clients, and family caregivers from the beginning is a core part of [Always Events](#) and can become second nature. To enable faster, more effective results from the outset, seek to discover experiences of, and input from, those who will receive teaching with teach-back.

Caregivers include designated family member or other individuals who provide care or support to a patient or client. They also provide useful input for improving our processes.

## Discover where to start.

- Get to know how patients and clients experience your current teaching processes. Ask what matters to them.
  - Ask what is hard to understand in the teaching content you will be focusing on.
  - Discover their biggest worries, e.g., understanding how or when to take medicines, avoiding salty foods, or navigating multiple appointments.
- Ask a small group of patients or clients about:
  - Difficulties remembering what's most important to do after a teaching session or reviewing written instructions.
  - Their worries about remembering something a doctor, nurse, social worker, or service provider told them to do for their health or safety, like taking medicines or applying for benefits to obtain healthy food.
  - What will be hard about doing what they need to do at home.

## Include patients and clients in small tests of change.

See [PDSA Template](#) and [PDSA Example](#).

- Focus on one [Need-to-know Need-to-do Concepts](#) issue or key message.
- Identify a few staff willing to test using teach-back with a few patients or clients.
- Working with the small willing group, carry out very small tests with one person teaching and using teach-back and one person to test with.
- Ask the learner about their experience during the teach-back test of change: what went well and what ideas they have that might make the experience better.
- Add their answers and experiences to what you learn from staff involved in the small tests and fold that into the next small tests. This series of small tests will help you learn what does or doesn't work.
- Then use observation to discover how well teach-back is being used in your tests. See [Teach-Back Observation Tool](#).

## Use ideas from examples of how teams successfully involved patients and clients to improve understanding by adding teach-back to standard processes.

- Improving print materials using a marker to strike through words they didn't understand.
- Testing teach-back processes for new or additional topics, e.g., providing discharge instructions, guidance for taking medicines.
- Improving call light use for those at risk for falling in a hospital or nursing home.
- Reducing school absences through student input on their struggles with what they needed to do for school assignments, when they were due, and how to get help when needed.
- Improving dosing accuracy for children—learning about parents' struggles while teaching them to read medicine labels and understand dosing instructions.
- Reducing emergency department visits for children and teens with asthma through input from parents while testing better ways to explain their asthma action plans.
- Reducing unplanned rehospitalizations for patients with heart failure through Heart Failure Clinic participants sharing ideas with staff and testing new ways to help patients remember at home. For example, a refrigerator magnet identified symptoms they should call the doctor for, along with the telephone number.