



THE ONTARIO

caregiver
ORGANIZATION

ESSENTIAL CARE
PARTNER SUPPORT
HUB

Essential Care Partner Program

IMPLEMENTATION TOOLKIT

A GUIDE FOR HOSPITALS



CONTENTS

Introduction	3
How this Guide was developed	4
What is an Essential Care Partner Program?	6
Essential Care Partner Guiding Principles	7
Essential Care Partner Leading Practices	8
Overview of Planning the Essential Care Partner Program	10
Prepare	11
Implement	15
Identify	15
Include	17
Support	19
Sustain	22
At-a-Glance: Leading Practices for Essential Care Partner Programs	23

ACKNOWLEDGEMENTS

The Ontario Caregiver Organization (OCO) gratefully acknowledges the contributions of caregivers, patient partners, champions, OCO colleagues, and health system partners, including The Change Foundation, Healthcare Excellence Canada, the Bruyère Research Institute, and Ontario Centres for Learning, Research and Innovation in Long-Term Care at Bruyère in making this work possible. In particular, this Guide has been written based on insight and feedback from care partners, as well as hospital and long-term care partners from the OCO's Caregivers as Partners Learning Collaborative.

INTRODUCTION

There are four million family and friends acting as unpaid caregivers in Ontario, delivering approximately three quarters of all front-line care in the province. **Caregivers are essential care partners** and play a critical role in providing unpaid physical, emotional, and cognitive support to family members, partners, and friends in various care settings. Evidence shows that when providers include caregivers as part of the care team, it improves patient/resident/client health outcomes and also leads to a better experience for front-line providers and care partners^{1,2}

New learning and evidence emerged from visitor restrictions during the COVID-19 pandemic that has reinforced the critical role of essential care partners and the risks to patients and the health care system when caregivers are not able to participate in care. New programs, practices and policies have been developed to support the inclusion of essential care partners as part of the care team. Many hospitals have policies and practices in place to enable caregiver presence and participation in care, but they vary widely from one hospital to another. An opportunity exists for greater consistency across Ontario and continuous quality improvement for existing programs.

¹Institute for Patient and Family-Centred Care, Facts and Figures About Family Participation; Better Together, Partnering with Families. <https://www.ipfcc.org/bestpractices/Better-Together-Facts-and-Figures.pdf>

²Canadian Foundation for Healthcare Improvement. Better Together: Re-Integration of Family Caregivers as Essential Partners in Care in a Time of COVID-19. Canadian Foundation for Healthcare Improvement; 2020. https://www.cfhi-fcass.ca/docs/default-source/itr/tools-and-resources/bt-re-integration-of-family-caregivers-as-essential-partners-covid-19-e.pdf?sfvrsn=5b3d8f3d_2

Definition of essential care partner (Healthcare Excellence Canada)

Essential care partners provide physical, psychological and emotional support, as deemed important by the patient. This care can include support in decision making, care coordination and continuity of care. Essential care partners can include family members, close friends or other caregivers and are identified by the patient or substitute decision maker.

Visitors have an important social role but do not participate as active partners in care.

Healthcare Excellence Canada. Policy Guidance for the Reintegration of Caregivers as Essential Care Partners. September 2021. https://www.healthcareexcellence.ca/media/4btksgpe/202110_policyguidance_en.pdf

Essential Care Partner programs in hospitals and long-term care homes are an important strategy for addressing current pressures in the health care system and improving patient care and health outcomes. Essential Care Partner programs in hospitals also help lay the foundation for a health care system that values and recognizes the critical role of caregivers and demonstrates commitment to person and family-centred care across the continuum of care.

The purpose of this guide is to provide health care teams and leaders with information and resources to develop or improve an Essential Care Partner program. Organizations who have implemented Essential Care Partner programs have indicated that using tools, templates and materials from others leads to easier, faster and more sustainable implementation. This guide includes materials and tools from hospitals and other sectors as well as lessons learned from early adopters and leaders in creating care partner inclusive care environments. It includes:

- **Essential Care Partner Guiding Principles**, which build the foundation for organizational commitment to Essential Care Partner program implementation or improvement
- **Essential Care Partner Leading Practices**, which summarize key components of successful Essential Care Partner practices
- **A step-by-step process** to develop an Essential Care Partner program

How this Guide was developed

The content in this Guide is based on evidence and the expertise and experience of caregivers, health care leaders, researchers, and hospitals that have been involved in the implementation of Essential Care Partner programs, practices and policies. This guide builds on the collective and continuing work of many, including essential care partners, partners in the Ontario Caregiver Organization's Caregivers as Partners in Care Learning Collaborative, and organizations including

A note about language:

Throughout this guide we use the term essential care partner and caregiver interchangeably. Other organizations may use other similar terms such as designated care partner, essential partner in care, etc. In addition, when we use the term 'family' this is in the broadest sense possible, including chosen family such as partners, friends, neighbours, etc.

The Change Foundation, Healthcare Excellence Canada and The Ontario Centres for Learning, Research and Innovation in Long-Term Care at Bruyère (Ontario CLRI).

The content for this guide was informed by Ontario CLRI's Essential Care Partner Implementation Guide (2022) and Planetree International's Patient-Preferred Practice Primer: Care Partners (2017) and also draws from Healthcare Excellence Canada's Essential Together work.

In 2020, the Caregivers as Partners in Care Learning Collaborative was formed by the Ontario Caregiver Organization and The Change Foundation to support rapid implementation, resource sharing and knowledge exchange for enabling the safe presence of caregivers in hospitals, long-term care homes, and other care settings during the COVID-19 pandemic. Early adopter organizations helped pave the way for other organizations and care settings by sharing their experience and knowledge so that others could learn from, adapt, and implement Essential Care Partner programs.



WHAT IS AN ESSENTIAL CARE PARTNER PROGRAM?

An Essential Care Partner program can help an organization to solidify their commitment to recognizing caregivers as essential partners in care. Essential Care Partner programs involve the implementation of policies and leading practices within a health care setting, so caregivers are **identified**, **included**, and **supported** to participate as part of the care team. They also remove barriers to essential care partner presence – even during health system pressures and outbreaks.



Implementing an Essential Care Partner program provides hospitals and care settings with numerous benefits, including:

- Enriched and improved patient care and safety
- More equitable and culturally-safe care
- More successful transitions
- Reduced stress and workload for healthcare teams
- Demonstrates commitment to person-and family-centred care
- Meaningful involvement as part of the care team and enhanced care partner experience
- Better staff awareness of the role and importance of essential care partners as part of the care team
- Supporting mutual trust and promoting two-way dialogue between care partners and health care team

ESSENTIAL CARE PARTNER GUIDING PRINCIPLES

These guiding principles lay the groundwork for organizational commitment to Essential Care Partner program implementation or improvement.

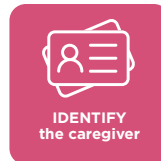
- Recognize that essential care partners (caregivers) are distinct from visitors and are necessary to the safety, quality of care, and health outcomes and well-being of patients
- Recognize that restrictions to essential care partner inclusion can result in:
 - Harm to patients, particularly for vulnerable populations
 - Increased caregiver distress
 - Greater demands on the health-care team and the health care system as a whole
- Include and value the essential care partner as a part of the care team
- Enable and empower patients to designate their essential care partners
- Minimize barriers to the presence and participation of essential care partners at all times, including during outbreaks and system capacity challenges
- Meaningfully engage care partners and patients in the design and development of policies and person-centred practices related to visitors and essential care partners

An Essential Care Partner program should establish policies and practices that operationalize these guidance principles. Embracing these guiding principles will support healthcare settings to foster an organizational culture that values the role of care partners.



ESSENTIAL CARE PARTNER LEADING PRACTICES

The following leading practices have been identified through learning from person and family-centred practices, as well as engagement with caregivers, hospitals, and health system leaders experienced in Essential Care Partner program implementation. These leading practices demonstrate the key components of Essential Care Partner programs.



IDENTIFY

ESSENTIAL CARE PARTNERS ARE NOT VISITORS

Caregivers are recognized as essential care partners, and differentiated from general visitors.

PATIENT DESIGNATION

All patients (or their substitute decision-makers) are empowered and encouraged to designate their essential care partner(s).

DOCUMENTATION

Essential care partners are documented (e.g., in the electronic medical record (EMR), including their contact information, timing, and level of participation in various aspects of care.

IDENTIFICATION

Essential Care Partner Identification (ID badge) is used to identify and formally recognize essential care partners.

ADVANCE IDENTIFICATION

Patients with a planned admission are encouraged to identify their essential care partner(s) prior to admission.





INCLUDE

POLICY

Organizational policies and practices enable the essential care partner open access to the care recipient (in accordance with patient wishes) and support essential care partner inclusion.

STAFF EDUCATION & TRAINING

Education and training is provided to all staff to understand the important role of essential care partners, and Essential Care Partner policies and practices.

COMMUNICATION

Essential Care Partner policy and program information is pro-actively communicated to all staff, patients, families and essential care partners.

SHARED COMMITMENT

Mutual expectation of responsibilities of essential care partners and other care team members are developed and defined, in partnership with patients, care partners and staff, including level of essential care partner participation in different aspects of care.

INTEGRATION

Essential care partners are integrated into point of care workflows and clinical pathways. Essential care partner tasks/time commitments are based on patient and care partner needs, abilities, comfort levels, and preferences.



SUPPORT

ESSENTIAL CARE PARTNER ORIENTATION

There is a process for on-boarding and orienting essential care partners.

ESSENTIAL CARE PARTNER EDUCATION & TRAINING

Essential care partners are provided education and training on key aspects of their role, including how they may choose to participate in care, and updated infection prevention and control protocols.

RAPID APPEALS

A rapid appeals process is in place in regard to essential care partner identification and inclusion.

SUPPORT SERVICES

Support services are available for essential care partners to answer questions and help them take care of their own needs while they are providing essential care.

LINK TO SUPPORT

Essential care partners are provided and/or linked to supports and resources for their own well-being.

OVERVIEW OF PLANNING THE ESSENTIAL CARE PARTNER PROGRAM

The following section has been presented in a linear step-by-step format under the categories of **Prepare**, **Implement** and **Sustain**, however as you work through your implementation and/or improvement processes, it will likely be a more iterative process.



PREPARE



1. Establish leadership commitment

An Essential Care Partner program demonstrates commitment from the organization that care partners are acknowledged and recognized as an integral part of the care team. There is an opportunity to make intentional links between organizational strategy and how an Essential Care Partner program can further strategic directions regarding person and family-centred care. An Essential Care Partner program contributes to building an authentic culture of inclusion and person and family-centred care.

It is critical to appoint a senior leader in the organization accountable for the development, implementation, and/or improvement of your Essential Care Partner program. Senior leaders play a crucial role in removing barriers to implementation and ensuring Essential Care Partner policies and practices move forward amidst competing priorities and pressures.

A business case using evidence of the importance of Essential Care Partner presence and inclusion may be helpful in securing commitment and endorsement from senior leaders.

2. Identify program/project lead responsible for planning, implementation and evaluation

Designating a program or project lead is important to coordinate Essential Care Partner planning, implementation, evaluation and improvement efforts. Determine where in the organization this might fit. For many hospitals, an Essential Care Partner program may be led by quality or patient experience departments.



TOOLS YOU CAN USE

.....

[The Ontario Caregiver Organization's Essential Care Partner Support Hub](#)

[The Ontario Caregiver Organization's Essential Care Partner Evidence Summary](#)

[Healthcare Excellence Canada's Evidence Brief](#)

3. Form an Essential Care Partner interdisciplinary project team, including care partners

Establish a project team to support co-design implementation and improvement. Engage a broad range of staff, including professional practice and patient experience leads, social workers, clerical/admin staff, security, clinical and non-clinical staff, occupational health and/or IPAC leads, nutrition services, communications, housekeeping, nurses, personal support workers, professional practice, and physicians.

Include several patient and care partners as part of this project team. Care partners bring valuable expertise and experience, distinct from both the patient and staff voice.

This team can work together to customize the Essential Care Partner program based on the unique needs and specifications of the organization. The team will determine the processes and activities that will support how essential care partners will be identified, included and supported across the organization.

As a project team, familiarize yourselves with resources, tools and templates to support Essential Care Partner implementation and improvement.

4. Meaningfully engage caregivers, patients and front-line staff in all aspects of Essential Care Partner program development

Include care partners, patients and front-line staff as early as possible in your planning process. Work with your existing patient experience/patient engagement leads to meaningfully engage these groups. Use existing mechanisms and groups for engagement such as Patient Family Advisory Committees. To eliminate as many barriers to patients and care partner participation, offer different types of opportunities, such as surveys, focus groups, advisory committees, working groups and other opportunities for patients and care partners to share their story/experience. Offer a range of options that encourage participation for care partners and patients, with the option to participate virtually. Consider an honorarium for working patients and partners who may have to take time off work to participate.



[The Ontario Caregiver Organization's Meaningful Engagement Resources and Co-design Tools](#)

[The Ontario Caregiver Organization's 7 Things to Think About When Considering Compensation](#)

[Healthcare Excellence Canada's Engagement-Capable Environments Organizational Self-Assessment tool](#)

Early engagement of patients, staff and care partners in the process paves the way to co-design the development of Essential Care Partner policies and practices.

5. Review organizational policies and practices

The project team should compile and collectively review existing organizational policies relating to visiting, care partner or family presence. Compare existing policies with the Guiding Principles and Leading Practices offered in this Guide.

Organizational policies that enable essential care partner presence are beneficial to patient outcomes and in sustaining high quality care³. Equity and inclusion should be a key consideration when reviewing and revising policies – ensure that policies do not create unintended barriers for patients or care partners. Minimizing barriers to care partner inclusion is a particularly important consideration for equity-deserving patients and their care partners. For example, if a patient or care partner does not read English and the only way the program is communicated is in written materials, this will create a barrier for care partner designation and participation.

When reviewing policies and practices, use the Essential Care Partner guiding principles and leading practices as a guide and identify areas for improvement. In particular, policies should ensure that:

- Caregivers are recognized as essential care partners, and differentiated from general visitors
- Organizational policies and practices enable the essential care partner open access to the care recipient (in accordance with patient wishes) and support essential care partner inclusion
- All patients (or their substitute decision-makers) are empowered and encouraged to designate their essential care partner(s), and have the ability to make changes to this, if necessary
- Essential care partner tasks/time commitments are based on patient/resident and caregiver needs, abilities, comfort levels, and preferences

The project team should work together to develop and define mutual expectations of responsibilities for essential care partners



[Healthcare Excellence Canada's Policy Guidance](#)

[Healthcare Excellence Canada's Essential Together organizational self-assessment](#)

[Ontario Ministry of Health's Health Equity Impact Assessment tool](#)

[Hôtel-Dieu Grace Healthcare's Family Presence Policy](#)

³Canadian Foundation for Healthcare Improvement. Better Together: Re-Integration of Family Caregivers as Essential Partners in Care in a Time of COVID-19. Canadian Foundation for Healthcare Improvement; 2020. https://www.cfhi-fcass.ca/docs/default-source/itr/tools-and-resources/bt-re-integration-of-family-caregivers-as-essential-partners-covid-19-e.pdf?sfvrsn=5b3d8f3d_2

and other care team members, including the level of essential care partner participation regarding different aspects of care. This is an opportunity to strive for a care partner inclusive environment that is consistent across the organization, with little to no restrictions to essential care partner presence and inclusion.

Prepare to revisit and revise these policies once you have implemented the Essential Care Partner program, based on evaluation outcomes and feedback from patients, care partners and staff.

6. Plan your implementation approach

Some organizations may choose a pilot first approach (e.g., starting with a floor or unit), while others will move to an organization-wide approach right away. Consider using a Plan Do Study Act (PDSA) approach to test the practices for identifying, including and supporting care partners. Use a quality improvement approach in order to learn from and improve policies and practices, based on the experience of staff, patients and care partners. As much as possible, plan to adapt existing tools and templates to facilitate implementation.

During your planning process:

- Consider early on how you will pro-actively communicate about the Essential Care Partner program (see *Step 9* for more detail)
- Develop a process to address concerns and to problem-solve glitches, unanticipated situations, unique circumstances. There should be ample opportunity for both staff and care partners to bring forward questions, concerns and suggestions.
- Consider early on how to evaluate your Essential Care Program (see *Step 10* for more detail)

7. Identify and gain support of internal champions.

These champions may be those in leadership or clinical roles in specific departments or units. It is particularly helpful to have champions in each department/unit that help staff navigate, understand and embrace the Essential Care Partner program.



[Health Quality Ontario's PDSA: Plan-Do-Study-Act Instruction](#)

IMPLEMENT



8. Design and Implement Essential Care Partner policies, practices and processes

This section will help to determine the processes and activities required to operationalize the Essential Care Partner program. The key components of your program should **identify, include** and **support** essential care partners across the organization, and policies should be revised to reflect program practices and processes. As much as possible, strive for consistency across the organization. If this is not possible, clearly indicate the rationale for the inconsistency, as well as what this means for staff, patients and essential care partners. This is particularly important when considering transitions within the hospital (e.g., from unit to unit).

The following section breaks down the key components of an Essential Care Partner program using leading practices as a guide.



IDENTIFY

A. Establish processes that enable and encourage all patients to designate essential care partners

The process for patients (or their substitute decision makers) to designate their essential care partners should be simple and straightforward. Patients should be able to select more than one essential care partner and be able to add or change essential care partners throughout their care journey. When possible, establish processes to enable and encourage patients with a planned admission to identify their essential care partner in advance of admission. An essential care partner may or may not be a patient's substitute decision maker or power of attorney.

B. Determine processes required to provide essential care partners with a form of Caregiver Identification (ID badge)

Caregiver ID is used to identify and formally recognize essential care partners across the organization. The benefits of using a Caregiver ID as



[The Ontario Caregiver Organization's Caregiver ID templates](#)

part of an Essential Care Partner program include:

- Helping to distinguish essential care partners from general visitors
- Clearly identifying care partners, especially during staff or shift changes or with the use of masks and PPE may make it more difficult to recognize care partners
- Reassuring staff and patients that the care partner has received training and has permission to be there
- Reassures care partners that staff know they have permission to be in the building and may help them feel more welcome
- Gives care partners confidence to ask questions, share information, and be active partners in care
- Recognizing the care partner's role as essential and facilitates the active partnership between care partners and staff in supporting care and decision-making

Considerations for providing essential care partners with a form of Caregiver ID include: determining the need for distributing and tracking Caregiver IDs, requiring return of Caregiver IDs, incorporating photo identification with Caregiver ID badge, and security functions or features of Caregiver IDs (e.g., in/out privileges or 24 hour enabled access). Each of these considerations may have resource and staffing implications unique to each care setting.

C. Determine processes and procedures required to document essential care partners

Documentation enables better inclusion of essential care partners as part of the care team, and will also support any future transitions (both to home/community and into LTC home settings). Depending on the organization and its data collection capabilities, documentation may occur in the electronic medical record (EMR) or use another system for capturing information.

Documentation should include essential care partner contact information and relationship to the patient, including if the care partner is also the substitute decision maker. Documentation may also include timing of care partner presence, as well as the level of participation in care that both the patient and care partner have identified based on their needs and preferences. This may change over time and documentation should be updated accordingly.



INCLUDE

D. Set-up education for all staff, not just those in clinical/patient facing roles

It is recommended that education for staff (including students) is implemented prior to roll-out of an Essential Care Partner program, and plans should be made to educate new staff and students as well as opportunities for refreshers for existing staff. Education should include the following key components:

- Purpose, philosophy and overview of the Essential Care Partner Program, including why the program is important, how it is aligned with person and family-centred practices, and how it can help teams to support patient care
- Implications for clinical roles and implications for privacy and consent
- Understanding the role of care partners and how to support and include them
- Clear description and understanding of the training essential care partners receive, including safety protocols
- Acknowledgement that health care teams are likely already positively working with care partners, and that the Essential Care Partner program is a formal way to promote the inclusion of essential care partners and ensure consistency across the organization
- Information on how to inform patients and care partners about the Essential Care Partner program, the appeals process, and what to do if care partners are not following policies
- Information on the support services that exist for care partners and how to connect care partners to support for their own well-being

E. Integrate care partner inclusion into practice

Essential care partners play a critical role in sharing information regarding a patient's medical and life history and socio-cultural considerations. Caregivers bring unique expertise that can enhance provider understanding and support patient care, including knowledge of patient needs and preferences, symptoms and behaviours⁴.



[The Ontario Caregiver Organization's Caregivers as Partners e-learning for care providers](#)

(note that this e-Learning can be easily integrated into your learning management system)

[The Ontario Caregiver Organization's Health Privacy & Consent resources for care providers and caregivers](#)

[Caregiver Centered Care's Competency Framework](#)

⁴Mitnick S, Leffler C, Hood VL; American College of Physicians Ethics, Professionalism and Human Rights Committee. Family caregivers, patients and physicians: ethical guidance to optimize relationships. *J Gen Intern Med.* 2010;25(3):255-260. doi:10.1007/s11606-009-1206-3

Determine processes and activities that integrate essential care partners into point of care workflows and clinical pathways. Document current practices that support care partner inclusion in care teams, units and settings across the organization and identify opportunities for improvement.

Defining the type and amount of support provided by the care partner using checklists or other tools can be helpful in communicating shared commitments for all team members, including essential care partners. Care partner tasks and time commitments should be based on patient and care partner abilities, needs, comfort level, and preferences.

It is important to underscore the holistic role that an essential care partner plays. For instance, not all essential care partners will want or be able to support personal care, however, their presence may provide emotional support for the care recipient. The emotional and psycho-social support offered by care partners, such as listening and/or providing encouragement, reassurance, or socialization are just as valuable as supporting physical care or more task-oriented activities such as assistance with meals. An essential care partner may not be able to physically come to the hospital, but their inclusion in making care decisions is paramount to the safety and well-being of the patient. Every care partner's comfort level and ability to participate in care will look different.

Essential care partner involvement is particularly critical during care transitions, and therefore mechanisms for enabling care partner inclusion during care transitions should be identified and established. For example, if the health care team and essential care partner work collaboratively to find a time and date that accommodates the essential care partner's work schedule, this will improve chances for a successful and sustainable transition. In addition, many long-term care homes have designated care partners or an Essential Care Partner program. This is an opportunity for health care teams to work across settings by communicating information about the essential care partner and their role during the patient's hospital stay, which will ultimately improve the patient's transition.



[Health Quality Ontario's Transitions Between Hospital and Home Quality Standard](#)

[OpenLab's Patient Oriented Discharge Summary \(PODS\) Toolkit](#)

[Ontario Health's Alternate Level of Care Leading Practices Guide](#)

[University Health Network's Essential Care Partner Training Checklist](#)



SUPPORT

F. Establish processes and compile materials required to on-board and orient Essential Care Partners

Ensuring essential care partners are welcomed and provided with an initial understanding of what to expect will set them up for success in their role. This might include providing an Essential Care Partner program package that includes important information about the healthcare setting, such as specific codes, safety protocols, services available, and way finding. Materials should also include information about their role as essential care partners, including a mutual understanding of responsibilities of team members and care partners, as well as making essential care partners aware of the appeal process and how they can access the patient experience office/lead for the Essential Care Partner program if needed.

Orientation may include a tour of the unit/care setting, family/caregiver resource centre (if applicable), or common areas, multi-faith space or prayer rooms, and introductions to key members of the care team. It can also help to orient care partners to the care area and point out the call bell, code blue button and its intended use, as well as other important info (for example, patient whiteboard, or other important signage).

G. Determine what education and training essential care partners will receive and how it will be provided

Processes and activities for education might include in-person training (globally or on the unit), training videos, and written materials. When possible, offer an online training option for those who may not be able to attend sessions scheduled within certain hours of the day. Clarify with essential care partners what education and training is mandatory versus optional. Use or adapt existing training and education materials.

Education should include the following key components:

- Information on infection prevention and control protocols
- Key aspects pertaining to their role, including how they may wish to participate in care
- How to partner effectively with health professionals
- A basic understanding of privacy and consent as it relates to the care partner role



[The Ontario Caregiver Organization's eLearning for caregivers: Caregivers Partnering with Health Professionals - A Strategy that Works](#)

[The Ontario Caregiver Organization's Health Privacy & Consent resources for caregivers and care providers](#)

[Lakeridge Health's Essential Partner-in-Care Online Training](#)

[Bruyère's Designated Care Partner Online Course](#)

- An overview of the Essential Care Partner program appeals process
- What to do in the event of an emergency (e.g., if the care recipient has a fall or trouble breathing), or what to do if another person (not the person they are supporting) requires care (e.g., they may be instructed to pull the call bell and let the care team know another individual needs help)

H. Develop a rapid appeals process in regard to essential care partner identification and inclusion

An appeals process can help to resolve potential disputes or disagreements about essential care partner designation, access and inclusion. The process should be transparent, as timely as possible, and easily accessible for care partners to understand and use.

I. Establish what support services are available from the hospital to assist essential care partners to take care of their own needs while they are providing essential care

These supports may include a space for respite or remote work, family or caregiver resource centres, access to spiritual care, areas of worship, multi-faith or prayer rooms, as well as food/cafeteria or parking vouchers. It may also be helpful to include a list of local services or accommodation for care partners from out-of-town. This is a key opportunity to engage with families and care partners to better understand what would assist them and develop services that would help meet their needs.

J. Determine processes to connect essential care partners to support for their own well-being

Caregiving often has an impact on the caregiver’s health and wellness, employment, finances and personal relationships. Connecting care partners to support for their own well-being is helpful for building their resilience and preventing burn-out. Consider opportunities for care partner screening and further assessment to identify their unique needs.

Support materials provided to essential care partners should contain resources that outline where the caregiver can go for help. Support



[Healthcare Excellence Canada’s Essential Together Learning Bundles: Rapid Appeals Processes](#)

[The Ontario Caregiver Organization’s I am a Caregiver Toolkit](#)

[The Ontario Caregiver Organization’s Time to Talk Tips for Health Professionals to Engage with Caregivers](#)

[The Ontario Caregiver Helpline \(1-833-416-2273 CARE\)](#)

[The Ontario Caregiver Organization’s Programs & Services At-a-Glance](#)

materials such as brochures can be made available in common areas within the hospital for care partners to pick up and read. All staff can also play a key role in recognizing caregivers in distress and connecting them to support. The Ontario Caregiver Organization offers programs, services and resources that are available for all caregivers across the province.

9. Communicate the program and process to staff, patients and care partners

Plan to proactively communicate Essential Care Partner policy and program information to all staff, patients, families and essential care partners. Communication methods can vary, and might include communication or updates on the website, in e-bulletins, newsletters, internal memorandums, and communication boards. Develop a broad organizational communication plan for the community and general public (which might include media and social media).

At the outset, consider holding huddles to explore barriers, fears and worries from staff regarding the Essential Care Partner program. Also consider how to communicate on-going changes or improvements to the Essential Care Partner program as it becomes embedded in operations.



[Sault Area
Hospital's
Caregiver ID
Poster for Staff](#)

SUSTAIN



10. Evaluate and Improve your Essential Care Partner program

Determine metrics to evaluate the impact of your Essential Care Partner program, including both process and outcomes measures.

Decide on baseline data collection that would be helpful to inform the impact of the program. This might include: patient satisfaction scores, readmission rates, number and type of complaints, number of phone calls by family to particular units, number of call button notifications, falls, and other care quality outcomes.

Process measures may include: number of essential care partners, number of Caregiver ID badges, number of care partners trained, and number of referrals to caregiver support.

Plan to conduct surveys for staff and care partners, ideally pre-implementation and post-implementation, to understand their experience and identify opportunities for Essential Care Partner program improvement. The engagement, feedback and support of staff is crucial to the success and sustainability of an Essential Care Partner program.

Develop a continuous improvement process. Continue to monitor and collect feedback, concerns and suggestions from staff, patients, families and essential care partners on the Essential Care Partner program. Use mechanisms such rounding, check-ins and surveys, focus groups, a suggestion box, and promotion week to help collect input.

Make changes and updates to the Essential Care Partner program based on this feedback, and revise policies and practices accordingly.



TOOLS YOU CAN USE

[Ontario Centres for Learning, Research and Innovation in Long-Term Care at Bruyère's Essential Care Partner Evaluation Templates](#)

AT-A-GLANCE: LEADING PRACTICES FOR ESSENTIAL CARE PARTNER PROGRAMS IN HOSPITALS

This overview of leading practices demonstrates the key components of Essential Care Partner programs under each area of focus – **Identify**, **Include** and **Support** the essential care partner.

Identify the caregiver	Include the caregiver as part of the care team	Support the caregiver
<p>ESSENTIAL CARE PARTNERS ARE NOT VISITORS Caregivers are recognized as essential care partners, and differentiated from general visitors.</p> <p>PATIENT DESIGNATION All patients (or their substitute decision-makers) are empowered and encouraged to designate their essential care partner(s).</p> <p>DOCUMENTATION Essential care partners are documented (e.g., in the electronic medical record (EMR), including their contact information, timing, and level of participation in various aspects of care.</p> <p>IDENTIFICATION Essential Care Partner Identification (ID badge) is used to identify and formally recognize essential care partners.</p> <p>ADVANCE IDENTIFICATION Patients with a planned admission are encouraged to identify their essential care partner(s) prior to admission.</p>	<p>POLICY Organizational policies and practices enable the essential care partner open access to the care recipient (in accordance with patient wishes) and support essential care partner inclusion.</p> <p>STAFF EDUCATION & TRAINING Education and training is provided to all staff to understand the important role of essential care partners, and Essential Care Partner policies and practices.</p> <p>COMMUNICATION Essential Care Partner policy and program information is pro-actively communicated to all staff, patients, families and essential care partners.</p> <p>SHARED COMMITMENT Mutual expectation of responsibilities of essential care partners and other care team members are developed and defined in partnership with patients, care partners and staff, including level of essential care partner participation in different aspects of care.</p> <p>INTEGRATION Essential care partners are integrated into point of care workflows and clinical pathways. Essential care partner tasks/time commitments are based on patient and care partner needs, abilities, comfort levels, and preferences.</p>	<p>ESSENTIAL CARE PARTNER ORIENTATION There is a process for on-boarding and orienting essential care partners.</p> <p>ESSENTIAL CARE PARTNER EDUCATION & TRAINING Essential care partners are provided education and training on key aspects of their role, including how they may choose to participate in care, and updated infection prevention and control protocols.</p> <p>RAPID APPEALS A rapid appeals process is in place in regard to essential care partner identification and inclusion.</p> <p>SUPPORT SERVICES Support services are available for essential care partners to answer questions and help them take care of their own needs while they are providing essential care.</p> <p>LINK TO SUPPORT Essential care partners are provided and/or linked to supports and resources for their own well-being.</p>

Essential Care Partner Support Hub

Email: ecpsupporthub@ontariocaregiver.ca

Ontario Caregiver Helpline

1-833-416-2273

The Ontario Caregiver Organization

Email: info@ontariocaregiver.ca

Phone: 416-362-CARE (2273) or 1-888-877-1626

www.ontariocaregiver.ca

