

PATIENT/PCG TEACHING FOLLOW-THROUGH MINI CHECKLIST

A quick review for patient/caregiver teaching during a home health skilled nursing visit

Use this checklist to help confirm that teaching was relevant to today's skilled visit, individualized to the patient or primary caregiver (PCG), understood as appropriate, and followed up when needed.

1. Why Was Teaching Needed Today?

- ☐ Is the teaching connected to the patient's current condition, assessment findings, medications, treatment, safety risks, symptoms, or plan of care?
- ☐ Was there a new concern, change in condition, recent event, new order, medication change, or ongoing teaching need to address?
- ☐ If teaching was continued from a previous visit, did I identify what still needed reinforcement?

2. What Does the Patient/PCG Already Understand?

- ☐ Did I assess what the patient or PCG already knows about the topic?
- ☐ Did I identify incorrect, incomplete, or unclear understanding when present?
- ☐ Did I avoid repeating the same teaching without first checking what the patient or PCG remembers or is able to follow?

3. What Was the Teaching Focus Today?

- ☐ Was the teaching focused on a **specific issue or need**, rather than only broad or general education?

When relevant, did teaching address:

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| ☐ Medication use, precautions, adherence, or monitoring | ☐ Infection prevention or signs of possible infection |
| ☐ Signs or symptoms to monitor | ☐ Equipment, supplies, or home management needs |
| ☐ Treatment or procedure-related care | ☐ Other patient-specific concerns identified during the visit |
| ☐ Fall prevention or other safety concerns | |
| ☐ Diet, hydration, activity, or other ordered care instructions | |

4. Was the Teaching Individualized?

- ☐ Was the information appropriate for the patient's current condition and needs?
- ☐ Did I consider the patient's or PCG's ability to understand and carry out the instructions?
- ☐ Did I adjust the teaching approach when barriers were identified?

Possible barriers may include:

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| ☐ Cognitive or memory limitations | ☐ Medication or treatment complexity |
| ☐ Hearing, vision, or language needs | ☐ Limited caregiver support |
| ☐ Pain, fatigue, anxiety, or limited attention | ☐ Difficulty obtaining medications, supplies, equipment, or services |
| ☐ Low health literacy or difficulty understanding instructions | |
| ☐ Physical limitations | |

5. Was Understanding Checked?

- ☐ Did I ask the patient or PCG to explain important information back when appropriate?
- ☐ If a skill or task was taught, was return demonstration used when appropriate?

- ☐ Could the patient or PCG identify what action to take if a problem occurs?
- ☐ Were misunderstandings or incorrect techniques clarified?

6. Were Warning Signs and Escalation Instructions Reviewed When Relevant?

- ☐ Did the patient or PCG know which symptoms, changes, or concerns should be reported to the provider or home health agency?
- ☐ When applicable, did teaching include when immediate emergency help or **911** may be needed?
- ☐ Were instructions consistent with provider orders, the plan of care, agency guidance, and the patient's individual situation?

7. What Was the Patient/PCG Response?

- ☐ Did the patient or PCG demonstrate understanding or correct performance when appropriate?
- ☐ Was there partial understanding or a need for further reinforcement?
- ☐ Were there questions, concerns, hesitation, refusal, or difficulty following the teaching?
- ☐ If the patient or PCG could not follow the instructions, did I identify the likely reason when possible?

8. Does Anything Need Follow-Up?

- ☐ Did the teaching identify a medication problem, safety concern, symptom change, treatment issue, or other clinical concern requiring follow-up?
- ☐ Was the provider, agency, or appropriate care team member contacted when needed?
- ☐ Were new instructions, orders, recommendations, or other follow-up needs addressed when applicable?

9. What Should Be Reinforced Next Visit?

- ☐ Is additional teaching or practice still needed?
- ☐ Is there a specific topic, skill, symptom, medication concern, or safety issue that should be reassessed?
- ☐ Does the next visit need to follow up on the patient's or PCG's ability to carry out previous instructions?

Quick Teaching Follow-Through Review

Before completing the visit, ask:

Why was teaching needed today?

What did the patient or PCG already understand?

What specific teaching was provided or reinforced?

How was understanding checked?

How did the patient or PCG respond?

What still needs follow-up or reinforcement?

If any of these are unclear, consider whether additional assessment, teaching, clarification, or follow-up is needed.

Important Use Note

This checklist is provided for general educational and teaching-review purposes. Patient and caregiver teaching must be individualized to the patient's condition, assessment findings, provider orders, medication profile, plan of care, patient/PCG abilities and response, agency policies and procedures, payer requirements, applicable laws and regulations, and skilled nursing judgment.

This resource does not replace professional nursing judgment, provider instructions, agency-specific requirements, emergency protocols, or applicable regulatory and payer guidance.