

## Tips for Educating Patients about COVID-19 and Documenting Patient Education

### Assessing Practice Risks for COVID-19

- Conduct an organizational assessment to determine risk areas.
- Develop an action plan to address risks.
- Educate staff about enhanced infection prevention protocols in order to answer patient questions related to organizational procedures.
- Develop a corporate record that reflects evidence of the assessment, the action plan, staff education, educational handouts provided to patients, and other steps used to mitigate COVID-19 transmission.

### Scheduling Patients

- When scheduling patients, consider communicating how your organization is mitigating COVID-19 transmission risk. For example:
  - “We want to make sure our patients and staff are as safe as possible. We have made many changes to reduce the risk to you and our staff. We now:
    - Limit who may come to the office with a patient. For example, minor patients may have one parent come to the office with them.
    - Require anyone who enters the office to wear a mask.
    - Screen patients for COVID-19 symptoms before they come to the office. We will call you the day before your visit to screen you. We will also ask if you need someone to enter the office with you.
    - Screen patients and visitors before entering the office. Call the office when you arrive in our parking lot. Wait in your car to be screened before entering the office.
- If you have any concerns, please let us know right away.”
- If patients do not want to come into the office, notify the physician and document that in the medical record. Offer a telemedicine appointment, if applicable.

### Checking-in Patients

- Reeducate patients on the healthcare organization’s expectations (e.g., face masks, handwashing, etc.).
- Provide general educational handouts to patients on COVID-19. The Centers for Disease Control and Prevention (CDC) offers several [printable resources](#), including [How to Protect Yourself](#) and [Please Read Before Entering](#).

### Preparing for Invasive Procedures

- Educate the patient about the risks related to COVID-19 exposure and obtain informed consent for the procedure.
- Document the informed consent discussion with the patient in the medical record.

COPYRIGHTED

1

This document is a work product of Coverys’ Risk Management Department. This information is intended to provide general guidelines for risk management. It is not intended and should not be construed as legal or medical advice. Your organization should add to and modify this tool to address the compliance standards and regulations applicable in your state or organization.

Any links included in this document are being provided as a convenience and for informational purposes only; they are not intended and should not be construed as legal or medical advice. Coverys Risk Management bears no responsibility for the accuracy, legality or content of the external site or for that of subsequent links. Contact the external site for answers to questions regarding its content.

## Tips for Educating Patients about COVID-19 and Documenting Patient Education

- Document the patient's choice to cancel or reschedule because of COVID-19 exposure risk as an informed refusal in the medical record.
- Document all information and education provided to the patient about steps you will take to minimize spread of infection from COVID-19, including cleaning protocols, PPE use, physical distancing requirements, and efforts to minimize unnecessary exposure to unessential staff, other patients, or visitors.
- Document the use of any educational resources from federal, state, and local agencies providing guidance on COVID-19 risks and requirements.
- Document your efforts to educate the patient on the responsibilities of both the practice and patient and the patient's willingness to adhere to them.

### Discharging Patients

- Provide patient education on the treatment plan and the infection risks in relation to the underlying clinical concerns.
- Discuss signs and symptoms to be aware of in terms of when to seek medical attention.
- Document this conversation in the medical record.

COPYRIGHTED

2

This document is a work product of Coverys' Risk Management Department. This information is intended to provide general guidelines for risk management. It is not intended and should not be construed as legal or medical advice. Your organization should add to and modify this tool to address the compliance standards and regulations applicable in your state or organization.

Any links included in this document are being provided as a convenience and for informational purposes only; they are not intended and should not be construed as legal or medical advice. Coverys Risk Management bears no responsibility for the accuracy, legality or content of the external site or for that of subsequent links. Contact the external site for answers to questions regarding its content.

Updated: May 2020