**What are Patient Bedside Whiteboards?**

The Patient Bedside Whiteboard is a tool placed near each patient bedside to support communication between the care team, the patient and their family.

**Why Patient Bedside Whiteboards?**

Our Path to Home goal is to provide our patients, families, and care team with a consistent experience using standardized processes, communication strategies and supporting technologies. Bedside whiteboards have proven to be tools that enhance the patient and family experience. Ensuring consistent updating and sharing of information with our patients and families allows them to become active participants in their plan of care.

**Provincial Bedside Whiteboard Elements**

The Path to Home patient bedside whiteboard is a communication tool for the entire care team, including the patient and family. The goal of standardizing the whiteboard is to ensure that essential information is shared and updated consistently. **Minimum mandatory** elements have been identified, as well as recommended optional elements, in order to integrate with other initiatives and to use the whiteboard across various patient populations. These elements will be included in the whiteboard template, and printed either directly on the board or on overlay sheets for existing boards.

<table>
<thead>
<tr>
<th>Provincial Mandatory Elements</th>
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<tbody>
<tr>
<td><strong>Day/Date</strong></td>
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<tr>
<td>Nurse(s)</td>
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<tr>
<td>Physician Name</td>
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<tr>
<td>ADOD</td>
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<tr>
<td>Today’s Goals &amp; Schedule</td>
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<tr>
<td>Family Notes</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Optional/Recommended Elements:</th>
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<tbody>
<tr>
<td>Diet</td>
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<tr>
<td>Mobility Assistance</td>
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<tr>
<td>Last pain medication</td>
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<tr>
<td>Pain Scale</td>
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<td>Room #</td>
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<td>Room Phone#</td>
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<td>My ride home</td>
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<td>Nurse Attendant or Health Care Aid</td>
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<td>Toileting</td>
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<tr>
<td>Special Instructions</td>
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</tbody>
</table>

**Figure 1.0 – Bedside Whiteboard Example**

Covenant Health Acute Care Edmonton Medicine Template

- **Today’s Date**
- **Nurse**
- **Buddy Nurse**
- **Diet**
- **Mobility**
- **Anticipated Date of Discharge**
- **Physician Team**
- **Schedule for Today**
- **Family Notes to Patient**

Only document the “time” of the test/procedure/or assessment not what test is to be performed i.e. “0900h procedure” “1030h test”.

Family Notes will be used for family to patient communication ONLY.
Process for Using the Patient Bedside Whiteboard

On Admission

- The bedside nurse will review with the patient using a information leaflet regarding the purpose of the patient bedside whiteboard.
- Verbal consent will be obtained by the patient/designate prior to use of the patient bedside whiteboard.
- The bedside nurse will use the following script to explain the purpose of the tool and obtain consent.

“The whiteboard located near your bed will be used as a communication tool between you, your family and your caregivers. This will be updated at each shift change and as required. Do you have any questions about the information we will communicate to you on the whiteboard? May we use this tool to communicate your care with you?”

- If the patient declines the use of the Patient Bedside Whiteboard, the bedside nurse is to document in the nurse’s notes and Kardex that the patient wishes the whiteboard not to be used. Documentation may be written as follows:

“The patient/designate was made aware of the purpose of the whiteboard as a tool to communicate care. The patient has chosen that the bedside whiteboard is not to be used.”

Shift to Shift

- During the bedside shift report the incoming nurse will update the date, nurse/buddy nurse and Anticipated Date of Discharge sections on each patient bedside whiteboard.
- The bedside nurse is responsible for updating the bedside whiteboard with the patient/or family early in the shift and if there are any changes/additional information throughout the day.
- The interprofessional team will also update the patient, the bedside whiteboard and Kardex with any changes/additional information throughout the day.
- When communicating with the patient regarding the information that is written on the whiteboard, the bedside nurse and the interprofessional team will respect the patient’s privacy by using the least amount of information principle and by speaking in a quiet tone.

Information and Privacy

The use of the patient bedside whiteboard template has been vetted through Covenant Health Information and Privacy.

Two important considerations to guide the use of patient bedside whiteboards are:

- Do not use any patient identification or personal health information such as diagnosis on the boards.
- Instruct the patient that the use of the board is at their discretion.

Whiteboard Accuracy

- The unit supervisor or designate will audit the bedside whiteboards across various shifts (Days, Evenings, Nights, Weekends)
- During the Shift Introduction Report; the charge nurse will be updating the nursing team of Whiteboard Accuracy as a Key Performance Indicator.
- The inpatient unit will be responsible to have a visual dashboard to share audit results with all interprofessional team members.

Ensure that patients and family members are aware of:

- the purpose of the bedside whiteboard
- that it will be updated by the bedside nurse and the interprofessional team
- that the patient is allowed to change their mind about using the bedside whiteboard at any time if the patient no longer wishes to use it
- The bedside nurse will explain to the family when present that they can write notes to the patient, but any patient concerns are to be discussed with the nurse.
Patient Bedside Whiteboard Observer Audit Form

Date of Data Collection

Name of Observer

<table>
<thead>
<tr>
<th>Room #</th>
<th>Current Date</th>
<th>Bedside Nurse’s Name</th>
<th>Buddy Nurse’s Name</th>
<th>Physician Name</th>
<th>Matches Dr. on Rotation?</th>
<th>ADOD</th>
<th>Matches Kardex?</th>
<th>Today’s Schedule</th>
<th>Matches Kardex?</th>
<th>Diet</th>
<th>Matches Kardex?</th>
<th>Mobility</th>
<th>Matches Kardex?</th>
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Instructions for Use:

Unit Supervisor or designate completes this form.
Observe 3-6 whiteboards per day.
Rotate which whiteboards you check each day - over time you will check every whiteboard on the unit.
Be sure to vary observation times between days, evenings and nights.
Put a check mark in the box/space provided for each of the components that are on the whiteboard you observed.
Leave space blank if not observed.
To calculate totals, add the number of check marks in each component’s column.
Creating Your Own Bedside Whiteboards

**Purchasing Whiteboards**
- Whiteboards can be purchased from various vendors.
- Whiteboards vary in products such as: Magnetic, Porcelain or Dry Erase.
- One whiteboard per patient bed.

**Recommended Specifications**
- Dimensions: 24”W x 18”H or 36”W x 24”H (Dependent on program specific space and content required)

**Installation**
- Units will need to coordinate with Facilities Management to arrange installation in the patient rooms.
- Placement should be considered to aid in reading and visualization of the board by the patient.

**Getting Started**
- Multi-site programs are encouraged to develop one standardized template.
- Things to consider when creating a “whiteboard template”
  - Are text and/or pictures needed?
  - Do some elements require more writing space?
  - What are the whiteboard dimensions (Width x Height)?
  - Will the whiteboard be hung horizontally or vertically?
  - Will this be applied to existing whiteboards?

- With your program team, ensure that you have all of the mandatory elements included.
- Additional optional elements (Refer to page 3) have already been approved by the Information and Privacy department.
- Any supplementary elements that you would like to add to your patient bedside whiteboards must be approved by the Information and Privacy Office at: privacy@covenanthealth.ca
Frequently Asked Questions

Why Do We Use Patient Bedside Whiteboards?

- Each individual patient room whiteboard will be a communication tool with the patient and family, each whiteboard will communicate the date, nurse(s) name, physician names along with the Anticipated Date of Discharge (ADOD) and information about their plan of care.

Patients have asked for:

- increased communication with their care team, who their team is and who to communicate questions to

Has privacy been involved in the planning of the whiteboard content?

- The Covenant Health Privacy department has been involved with reviewing the template/toolkits/content and completing a privacy impact assessment.

Why is my Unit Supervisor/Designate auditing the bedside whiteboard?

- Clearly assigned accountability ensures that the patient bedside whiteboards are well implemented and effectively used.
- To help identify barriers and provide feedback to the interprofessional team, to create a culture of continuous improvement and to foster sustainability.
- To ensure patients have easy access to basic information about their care team and schedule.

Why is there no formal designated spot for my name as an Allied Health Team member?

- All members of the interprofessional team are valuable to patient care; introduction as a health care provider to the patient verbally will be done, as well you may include your name under a appropriate section.

Who updates the bedside whiteboard and Kardex?

- The bedside nurse and the interprofessional team will update the bedside whiteboard/ Kardex and patient; with any changes or additional information throughout the day

Who updates “Schedule for Today” for DI tests or procedures?

- The bedside nurse will write the test time and notify the patient of a Diagnostic Imaging Test or procedure time on the whiteboard.

How do we clean the bedside whiteboards?

Environmental Services and IPC have been contacted to provide cleaning requirements:

- The whiteboards shall be considered like any other item in the patient room, and would be cleaned according to environmental services standards.