

Tips for Conducting a Palliative Care Home Visit

Pre-Visit Preparation

- **Confirm the visit time** with the patient and family.
- **Confirm parking** with the patient and family.
- **Confirm whether the household has any pets or animals and how to manage them.** Inform patient and family if you have allergies.
- **Confirm the location and directions to the house** with as much detail as possible.
- **Keep safety in mind.** If safety is an issue, consider the timing of your visit during daylight hours, have a colleague accompany you, or utilize a security service.
- **Review patient data for key health care information and essential details.** Patients or family may greet you at your car and wait there if you review the chart while in their driveway.
- **Gather materials—both paperwork and medical supplies—and place in washable containers, bags, or briefcase.** Assessment supplies may include blood pressure cuff (with multiples cuff sizes), stethoscope, otoscope, and ophthalmoscope, thermometer, latex and non-latex gloves, gauze, tape, bandage scissors, lubricant, tape measure, tongue depressors, and hand sanitizing wipes. Supplies for paperwork include clipboard with pen attached, laptops or tablets, and newspaper or pads to protect bag and supplies from unsanitary areas.
- **Keep supplies to a minimum** and remember that your expertise is the most important “supply” you bring to the visit.
- **Wear professional but comfortable clothing that does not restrict movement.** First impressions count—clothes and cars often offer first impressions. Most patients are not in a hospital bed, so you may be kneeling on the floor or bending over a recliner.
- **Prepare your car.** Keep it organized and neat since it is a reflection of you and your care. You spend a lot of time in your car and it might show. Since a family member may hover outside your car as you complete a phone call or gather your supplies, you want to have a clean car. Patients and families pay attention to those details. Keep a bag for garbage, an organizer for your papers, and take the time to use them. First impressions matter.

- **Pack an extra change of clothes.** You may be in heavy smoke or exposed to pet hair or body fluids. An air freshener spray can help, too.

Travel and Arrival

- **Allow sufficient travel time.**
- **Safety is of paramount importance.** Staff must feel safe during a visit; if you feel unsafe, you should leave. Having two team members present in specific settings can be helpful.
- **Be aware of your surroundings.** Understand and assess the environment in which the patient lives, both inside and outside the home. It may be safer to work with security or in pairs, or even to reschedule. Go into each visit armed with as much information as possible about the home situation you are entering.
- **Parking your car is important.** Do not block other cars and don't let your car get blocked by others in case you need to leave quickly.
- **Keep your car keys and valuables on your person.** Leaving items in your car is an invitation for theft.
- **Announce and introduce yourself.** Show patients and families your work identification badge. Introduce yourself to everyone in the house and write down their names and their relationships to the patient. This is polite and it may be important to have those names in the medical record in order to jog memories.
- **Keep personal items such as keys or cell phone on your person** should you need to leave quickly or call for assistance. Most patients are very grateful for your visits, but not everyone. It is possible that you may have to leave quickly or abandon your supplies.
- **Be prepared to respect individual preferences and culture in terms of shoe removal.** Consider bringing slippers.
- **Allow animals time and space to get comfortable with you.** Patients and families judge how you treat animals as to how you will treat them; their pets are important to them.
- **Consider putting cell phones and pagers on silent** and responding only to urgent text messages from the manager. Be deliberate about avoiding interruptions from a pager or cell phone. Put them on vibrate or warn patient and family if expecting an emergency call. Step outside for any conversations. Consider responding to e-mails around lunch and at the end of the day.

- **Attend to patients' cultural and generational preferences for care.** You may need to prepare for language barriers. Use an interpreter service.
- **Patient and family may offer food and drinks during the visit as an expression of welcome and hospitality.** Refusal may offend or lead to apprehension in the patient and/or family.

The Visit

- **Explain the purpose of the visit and what you will do.** Also inform the patient and family of any time limits so they know what to expect.
- **Explain the organization of the visit** and what to expect including review of forms, paperwork, a physical examination, and time for questions.
- **Take a health history** appropriate to the visit.
- **Before doing a physical examination, ask for permission.** Explain all assessment processes before you do them.
- **Wash hands** before and after you perform any physical exam.
- **Maintain privacy for the patient**, either with a room, sheet, or blanket for any examination that exposes parts of the body. Ask family to leave during those periods to protect privacy.
- **Review the care plan** in terms of findings, care plan, treatment, and management.
- **Make sure there is time set aside specifically to ask about—and listen to—the top concerns and priorities of the patient and the family caregivers.** This information is the foundation of the care plan.
- **Do not offer your cell phone number.** Provide the office staff number during the day and the 24/7 service number for after-hours needs.
- **Be realistic about how much you can achieve in one visit.** It's okay to focus on the one or two most pressing issues. Setting limits is important.
- **Enjoy!** The best visits are in someone's home where you can connect to your patients as whole persons who have lives and stories beyond their medical issues. It is both a privilege and critical to good care to see their living situation, relationships, family life, medications, cabinets and refrigerator, and the safety of their surroundings.

The Departure

- **Be deliberate in saying good-bye.**
- **Explain the follow-up plan.**
- **Review the communication process**, and provide written and legible contact numbers.
- **Document as much as possible in the car**, while you remember the details.