



# Telephone “Teach-back” Effectiveness for Endoscopy Pre-Procedure Instructions

Valerie Hodges, RN, CGRN; Jessica Stephenson, BSN, RN-BC; Luz Diez, RN, BSN, OCN; Neha Patel, RN, BSN  
Tampa, Florida



H. LEE MOFFITT CANCER CENTER & RESEARCH INSTITUTE,  
AN NCI COMPREHENSIVE CANCER CENTER – Tampa, FL  
1-888-MOFFITT (1-888-663-3488) | MOFFITT.org

## 1 Background

Previous evidence-based project data indicated misunderstanding of pre-procedure instructions may lead to day-of-procedure cancellations or delays. This is especially true for the endoscopy clinic where most of the pre-procedure instruction happens over the telephone.

The “Teach-Back” method has been utilized in various settings and is recognized as best practice to confirm understanding of provided information.

The Endoscopy Center at Moffitt Cancer Center has taken the “Teach-Back” method one step further by using “Teach-Back” over the telephone for pre procedure instructions.

## 2 Problem

Data collected from previous evidence-based project concluded confusion regarding bowel preparations, lack of understanding regarding NPO guidelines, and misunderstanding of caregiver/driver requirements for anesthesia were major knowledge gaps and led to same-day procedure cancellations.

## 3 Purpose

To evaluate the effectiveness of using “Teach-Back” over the telephone for patient’s understanding of pre-procedure instructions

## 4 Literature Review

Haufler, K. (2011). Using Nurse-to-Patient Telephone Calls to Reduce Day-of-Surgery Cancellations. AORN Journal, 94, 19-26.

Kornburguer, C. (2013). Using “Teach-Back” to promote a safer transition from hospital to home: An evidence-based approach to improving discharge process. Journal of Pediatric Nursing, 28, 282-291.



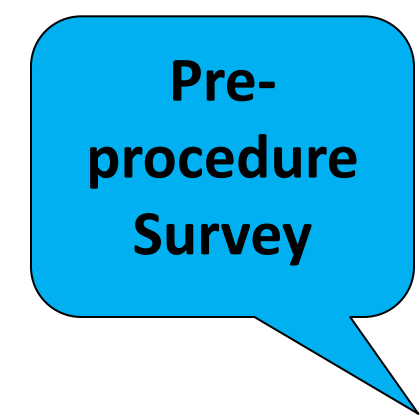
## 5 Planning

Review of literature identified “Teach-Back” as the Gold Standard to confirm understanding of information, however, no articles documented the use of “Teach-Back” over the telephone.

Prior to implementation of “Telephone Teach-Back” of pre-procedure instructions, patient surveys were created in order to assess for effectiveness of current pre-procedure instructions.

Knowledge gaps were identified.

Moffitt patient education specialists were consulted to assist with the development of the *Endoscopy Telephone Teach-Back Script for Nursing*. Survey results and identified knowledge gaps were used to lead the script development.



**Endoscopy Clinic Questionnaire**

We would like your feedback on the instructions you were given prior to having an endoscopy procedure. We will use this information to learn ways that we can improve the effectiveness of our instructions and improve the overall experience for you and for other Moffitt patients. Please answer each question below indicating your best possible response. Thank you for taking the time to complete this questionnaire.

- I spoke with a nurse about how to get ready for my test (endoscopy).  
Yes   
No
- I had a telephone number to contact the endoscopy clinic nurses if I had any questions.  
Yes   
No
- An adult must remain in the clinic during my entire visit.  
True   
False
- An adult must drive me home after my test (endoscopy).  
True   
False
- I had to complete a bowel prep (laxative to cleanse colon) for my test (endoscopy).  
True   
False
- If I did a bowel prep (laxative to cleanse colon) I could take the prep whenever I wanted.  
True   
False
- I was allowed to drink clear liquids up to my arrival for the test (endoscopy).  
True   
False
- The instructions I received helped to prepare me for my test (endoscopy).  
Strongly Agree  Agree  Neutral  Disagree  Strongly Disagree
- What suggestions do you have that would improve your endoscopy experience?

## 6 Patient Selection

Patient selection for “teach-back”:

- English Speaking
- Nonrecurring patients
- Patient available to speak with when call placed

## 7 Implementation

A dedicated Endoscopy Triage nurse used patient selection criteria to identify appropriate “Teach-Back” recipients.

The *Endoscopy Telephone Teach-Back Script for Nursing* was used to perform pre-procedure calls and documented in EHR.

Post “Teach-Back” surveys were added to recipient’s preoperative packet for assessment on procedure day.

Data from surveys after implementation were collected for three months.

**Teach-back Script for Nursing**

*Endoscopy Telephone Teach-Back Script for Nursing*

**Instructions for when to use:** Telephone calls addressing pre-procedure instructions  
**You will need:** Teach-Back script, Endo pre-call script, and Procedure specific instructions with appointment time

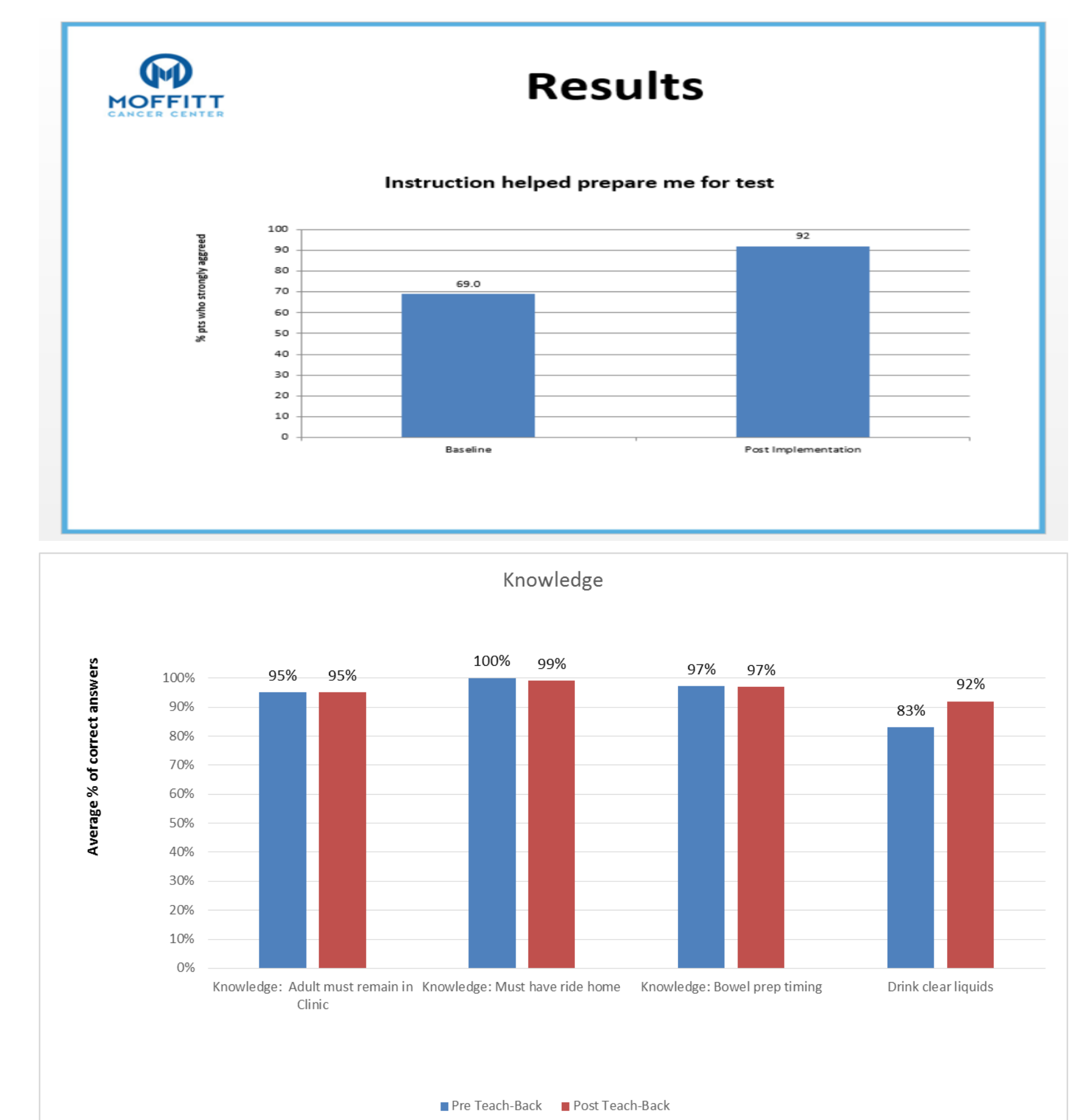
Nurse	Patient
1. <u>You have been instructed about a clear liquid diet as part of your preparation for your procedure...</u>	<b>Teach-back verification:</b> a. Let’s review- what are some clear liquids? b. Tell me the time you would start, and stop the clear liquids
2. <u>I know you understand the start and stop times of the clear liquid diet....</u>	<b>Teach-back verification:</b> I want to make sure I explained this to you clearly. a. Tell me, are there any exceptions, when you would be allowed to have something to drink after your given stop time? b. What are those exceptions? c. How much can you drink at that time?
3. <u>You have received instructions about taking a bowel prep in order to prepare for your procedure...</u>	<b>Teach-back verification:</b> Tell me a. The time/s you will take the doses of your prep b. The names and sequence of the prep components
4. <u>You have been instructed that you must have an adult with you, who can stay during your procedure, and then drive you home after your procedure...</u>	<b>Teach-back verification:</b> a. Do you have a caregiver/driver? b. What would happen if you arrive at the endoscopy center without a caregiver/driver?
5. <u>On the procedure instruction sheet there are reasons and specific numbers to contact us....</u>	<b>Teach-back verification:</b> a. Tell me how you would reach someone 1. During regular business hours 2. After hours or on weekend b. Tell me when you should contact the endoscopy nurse or the doctor?



Dedicated triage nurse

## 8 Results

There was a significant increase in the percentage of patients that strongly agreed instructions received using the “telephone Teach-Back” method help prepare them for their procedure.



## 9 Conclusion

Utilizing “Teach-Back” over the telephone helps patients understand pre-procedure instructions and feel more prepared for their procedure. Understanding of pre procedure instructions helps decrease knowledge gaps which may lead to delays and cancellations in procedures.

## 10 Discussion

Knowledge deficit improvements were small based on the pre-survey findings, however, proven teaching methodology was considered valuable as an attempt to have better patient outcomes.

Implementation of dedicated triage nurse prior to pre-data collection may have impacted pre-data results as enhanced instructions were being received.

## 11 Future Plans

- Broaden “Teach-back” over the telephone to Spanish speaking patients with pre-procedure instructions provided by nurse with certified medical interpreter credentials.
- Enhance “Teach-Back” over the telephone documentation of pre-procedure instructions.
- Continue staff development and comfort using “Teach-Back” over the telephone.