Patient and family advisor recruitment checklist

Outreach

- ☐ Develop recruitment criteria
- ☐ Ask practice staff and physicians for referrals
- ☐ Partner with local hospital and/or health plan patient/family advisory councils to help identify candidates
- ☐ Use recruitment handouts, fliers, etc. (see appendices 1, 2 and 3)

Identify

- ☐ Identify candidates
- ☐ Create application process
- ☐ Use application form (see Appendix 4)

Interview

- ☐ Conduct interviews with candidates
- ☐ Use interview protocol (see Appendix 5)

Select

- ☐ Select advisors (number determined by your practice)
- ☐ Use sample offer/regret letters (see Appendix 6 and Appendix 7)
- ☐ Use participation considerations letter (see Appendix 8)

Onboard

- ☐ Conduct an orientation session
- ☐ Use orientation agenda and other resources

7. Patient and family advisors orientation session

After you have selected your PFAs and received signed participation considerations letter, you may want to schedule an in-person orientation session with your team members and your PFAs, lasting 45–60 minutes. The orientation provides you with an opportunity to discuss roles, responsibilities and expectations for both your practice site and PFAs. Refer to the appendices for resources that you can use to help guide this meeting.

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