

Session 1: Patient and Visitor Conduct Policy (Sharonne Hayes, MD and Ben Houge, MS)

Objectives:

- Explain the journey in developing a policy about patient and visitor bias and misconduct.
- Describe the incident reporting process.
- Discuss lessons learned leading to updates in policy language.

Participants will gain answers to the following questions:

- What is the rationale, purpose, and scope of the Patient and Visitor Conduct Policy?
- What is Mayo's policy language on managing patients who request personal attributes of a staff member (race, religion, gender, weight, ethnicity, etc.)?
- How do you make exceptions to the policy?
- How do staff report incidents of bias and misconduct, and what happens to those reports?
- What is the collaboration between stakeholders such as Patient Experience, HR, Security, Diversity and Inclusion, and Compliance?

Case Study: A female patient prefers a female provider for her pelvic exam, and another female patient prefers only a Christian provider. Do we treat these two examples with the same policy and response?

Session 2: Behavior Management Process for Patients and Visitors who Misbehave (Ben Houge, MS and David Nestler, MD)

Objectives:

- List the steps leading up to termination of care.
- Distinguish the components between a "dismissal" and a "termination of care."
- Explain the unintended consequences for patients who come to the complex behavioral care unit after their care has been terminated.

Participants will gain answers to the following questions:

- What are the steps that take place from verbal warnings to termination of care?
- How do you manage the process when the patient who misbehaves also has filed a grievance about a care concern?
- What is the difference between a "Dismissal" from a provider or unit and a "Termination of Care" for all Mayo Clinic sites?
- What is the appeal process for patients whose care has been terminated?
- How do you manage patients with severe mental illness or cognitive impairments when implementing behavior management strategies?

Case Study: Parents of a minor patient continue to display egregious misconduct despite written warning letters that their child's care could be terminated. Do we terminate the child's care?

Session 3: How to respond to Patient and Visitor Bias and Misconduct

(Anjali Bhagra, MD, and Sheila Stevens, MSW)

Objectives:

- Discuss the Experience Model of Communication (XMOC) and how this model is implemented into the Behavior Management Process.
- Demonstrate skills for responding to biased requests.
- Apply XMOC strategies to case scenarios.

Participants will gain answers to the following questions:

- How do you respond to requests for personal attributes of clinicians, such as race, religious beliefs, and gender?
- What is your plan to hard-wire strategies so that staff are confident in their approach to responding to bias and misconduct in the moment?
- Is there a place for scripting when responding to bias and misconduct?
- How do you implement a boundary-setting strategy so that staff feel empowered to have responsible freedom in responding to misconduct?
- What mechanisms are in place to support victims of discrimination and harassment?

Case Study: Patient contacts Mayo Clinic by phone and politely states that he is a member of the Ku Klux Klan and would like his views honored during his upcoming visit. What strategies do we use from our Model of Communication to respond to this patient?

Patient and Visitor Misconduct – Bringing it all Together! (Ben Houge, MS, David Nestler, MD and Sheila Stevens, MSW)

Objectives:

- List components of Mayo Clinic's Computer-Based Training for incident reporting.
- Discuss if/when a breach of confidentiality occurs between the role of patient/employee.
- Provide answers to participants' questions.

Participants will gain answers to the following questions:

- How do you roll out a communication and training plan for managing patient and visitor bias and misconduct?
- Do you document misconduct in the patient's record? What do you do when employees misbehave when they are in the role of a patient?

Case Studies: Case scenarios will be presented by incorporating participants' questions into case scenarios.