

## STAFF CHECKLIST FOR ON-BOARDING NEW PATIENT AND FAMILY PARTNERS

- ✓ **Application complete? Please ensure that an application has been filled out**  
*If this potential Patient and Family Partner came to you first, please direct them to the Health PEI website ( <https://www.princeedwardisland.ca/en/service/apply-to-be-a-volunteer-patient-and-family-partner>) to fill in on-line application or have them contact the Patient Experience Manager for Health PEI to help them get started in this process.*
  
- ✓ **Criminal Records Check:**
  1. Confirm with Patient Experience Manager if Criminal Records Check (CRC) is already on file. (if yes) Move to interview set-up process.
  2. If CRC is not already on file, Kim Bustard will send to new applicant.
  3. Applicant to return to Patient Manager Office in c/o Laurie Shaw at Health PEI, 16 Garfield Street.
  
- ✓ **Interview: Staff leads, or committee designates:**
  1. Make initial contact to set up interview to ensure “right fit” for partner and for committee.
  2. Sample Interview questions attached or create your own.
  3. If you feel that this Perspective Partner in Care is the right fit for your committee? Make contact to welcome them on team.
  
- ✓ **Send Welcome material:**
  1. Send an email or mail a welcome letter to officially welcome Patient and Family Partner (Sample letter provided on Staff Resource Centre).
  2. Provide a Committee Terms of Reference, minutes or anything else that might be helpful for your Patient Partner to understand their role or function on the team.
  
- ✓ **The Confidentiality Agreement (Fillable form provided on staff Resource Centre):**
  1. Completed by new Patient and Family Partner when at first committee meeting. *(If the person is not intending to attend in person, you can send this form electronically and ask them to send it back to designated committee contact person.)*
  2. Designate Committee person to send agreement back to Patient Experience Manager through interoffice mail or regular mail to Laurie Shaw,
  
- ✓ **Expense Form for Mileage and Parking for Patient and Family Partners (Fillable form provided on Staff Resource Centre)**
  1. Committee Chair or accounting/office person to fill out Health PEI Patient and Partner Expense Form with department codes.
  2. Send form to accounts payable for processing.

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3. Questions about expenses? If you have any questions just give Laurie Shaw a call at 902-368-4788.
4. The Health PEI Patient & Family Expense form to be completed each meeting time.