

CASC tip sheet #12

Involving patients in clinical audit

BACKGROUND

Clinical audit examines whether patient care follows agreed best practice. Audit aims to improve care and ensure patients receive safe and effective interventions/treatment. Patients are critical to the success of clinical audit. They can tell us first-hand about their experiences, they often have the best understanding of their condition and patients often know where problems and bottlenecks exist. Furthermore, since 1994 the clinical audit community have been expected to involve patients in audit, HQIP have re-iterated this with a number of guides since their inception in 2008 and key leaders like Donald Berwick have constantly noted "the patient voice must be heard and heeded at all times" (see his 2013 King's Fund lecture).

Despite all of this, effective patient involvement in clinical audit appears to continue to remain elusive. According to CASC's annual survey from 2012-18, on average only 5% of respondents rated patient involvement in clinical audit as 'good' compared to >70% 'poor'.

Advice from CASC on PPI in clinical audit

Be careful how you involve patients in clinical audit

For us, patients can play a key role in many aspects of clinical audit. For example, patients can help identify clinical audit projects (e.g. via surveys, complaints, panels, etc.), patients can help offer advice on what data is collected (i.e. what aspects of care matter most to them), patients can review results and help to suggest possible changes/improvements, etc. Patients expertise varies, but some may be able to help create data collection tools, others might have a flair for proof-reading and making sure documents are patient-friendly (e.g. taking out unfamiliar jargon and acronyms). Indeed, patients involved in audit project teams can also be invaluable when it comes to helping champion changes and overseeing action plans to make sure these are implemented. However, although we know some teams use patients to collect clinical audit data, this approach is simply not for us. Even with a honorary contract in place, we worry that a volunteer could end up auditing the records of someone that they may know (family, friend, colleague, acquaintance, etc.) and this risk is not acceptable.



4 Useful websites/organisations to help drive PPI in audit

[Healthcare Quality Improvement Partnership](#) offer a wide range of PPI guides and case studies. You can also contact members of their Service User Network (SUN).

[King's Fund](#) provide various resources in patient engagement and involvement.

[National Association for Patient Participation \(NAPP\)](#) can offer lots of guidance.

[NHS England's Patient and Public Participation Policy](#) provides a wider guidance.

