

A white computer keyboard is visible in the upper right corner, and a silver stethoscope is positioned diagonally across the right side of the image. The background is a light, neutral color.

High-Level Design

A Proposal of Performance Interventions for
Green Wind Medical Clinic

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Introduction

This report presents the high-level design of 10 interventions that would be used to help Green Wind Medical Clinic to realize its desired performance (Job One), which is to **drive a positive patient experience by providing empathetic and considerate care and service.**

By achieving Job One, the clinic aims to increase the number of patients it serves by 10% in the coming 18 months and increase its revenue.

The interventions will target three categories of performers: the doctor, the nurses and the clerks.

Performance Objectives

The interventions proposed in the high-level design will target the following performance objectives. Topics covered by sub-objectives in the performance needs assessment are indicated as “focus areas” here.



Doctor

- Given a patient with a medical condition, provide excellent medical and diagnostic care that contribute to positive health outcomes
- Given a team of employees, encourage them to demonstrate exemplary behaviour as medical professionals to drive a positive patient experience
Focus areas: clarify performance expectations and standards, provision of feedback, recognition and reinforcement
- Given the clinic’s business needs and employee characteristics, offer a motivating work environment to enrich the employee experience
Focus areas: maintaining employee autonomy and good life-work balance, adding value and meaning

Phases: Disengaged | Neutral | Engaged



Nurses

- Given a patient with a medical condition, provide personalized care that would result in a positive patient experience
Focus areas: Essential nursing care, care solutions to improve patient experience, empathetic and considerate patient communication, patient empowerment
- Given a shared mission to drive positive patient experience at the clinic, maintain a harmonious and collaborative relationship with colleagues to improve patient experience

Phases: Low empathy | Neutral | High empathy



Clerks

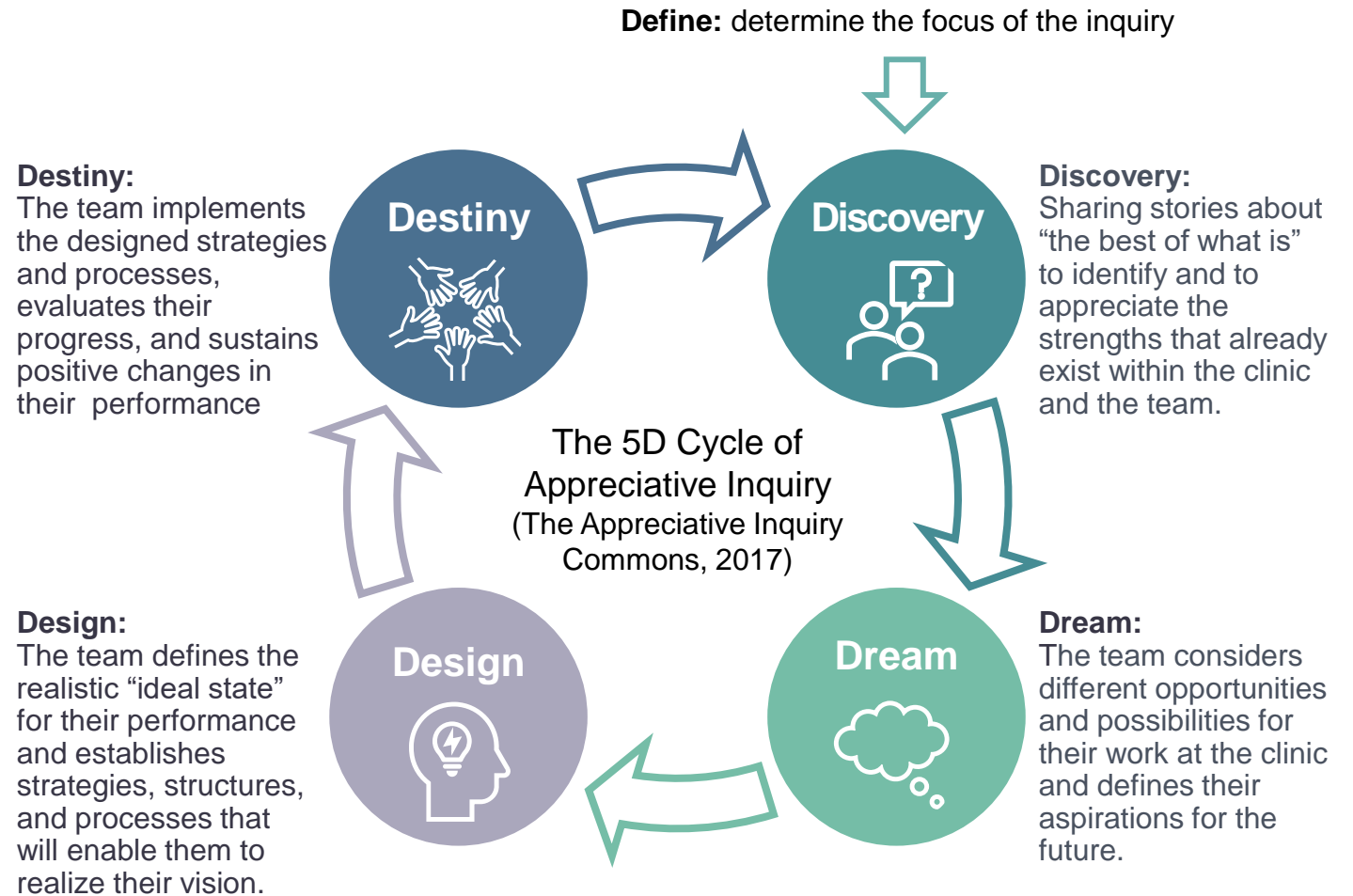
- Given a patient, demonstrate awareness of their experience, concerns, and perspectives to provide excellent service that would result in a positive patient experience
Focus areas: Essential clerical service, empathetic and considerate patient communication
- Given a shared mission to drive positive patient experience at the clinic, engage in actions that contribute to improving patient experience
Focus areas: Professionalism, feedback on patient experience

Phases: Low engagement | Neutral | High engagement

The Approach

The high-level design of the interventions is inspired by the framework of **Appreciative Inquiry**, which is a strength-focused and opportunity-driven approach to promote positive organizational change. This approach was selected as a way to address the performance gap related to **motivation and engagement** by helping the team focus on their individual and collective strengths, to find meaning and value in what they do, and to foster positive relationships with colleagues and patients to achieve Job One.

As the focus of the appreciative inquiry is already defined by the Performance Needs Assessment, the team will go through the remaining 4 phases of AI in this performance improvement campaign: **Discovery** to understand the best qualities of their current performance, **Dream** to establish visions and aspirations for the future, **Design** to create strategies and structures, and **Destiny** to deliver on the plan and to sustain performance.



The Roadmap

4. Patient Experience Guiding Principles & Standards

The team defines its own performance expectations & patient experience standards

5. Patient Care/Service Procedures

The team creates procedures to deliver on their guiding principles and standards

6. Patient Question Checklist

Patients are provided with prompts for questions and concerns they want to address with the doctor during their visit

7. Peer Observation & Feedback

The team observes each other's performance and provides peer feedback using a set of performance criteria



Instructional Learning



Information Resources



Support Emotional

1 Discovery



1. Appreciative Leadership Workshop

The clinic's management team learn about the AI approach to be able to effectively support the team through the performance improvement campaign

2



2. Patient Shadowing

Patient shadowing is conducted to identify what's working and what could be enhanced about the clinic's care and service practices from the patient perspective.

3



3. Patient Care/Service Success Stories

The team shares their past and current patient care/service success stories to identify their individual and collective strengths as well as enabling factors.

4

Design

5

6

7

Destiny

8

9

10



8. Online Patient Review

The team implements their new patient check-out procedures and request feedback via online review



9. Bi-Weekly Team Check-Ins

The team reflects on their performance improvement journey to share information, problem-solve, evaluate and readjust their approach as needed.



10. Team Appreciation

Individual and collective efforts are recognized and celebrated

Intervention 1

Appreciative Leadership Workshop



INSTRUCTIONAL INTERVENTION

This intervention addresses the **knowledge gap** by enabling the Doctor (and the General Manager as support) to gain knowledge and skills in appreciative leadership and feedback. The performance is addressed at the **individual level** for the Doctor as a disengaged or neutral performer.

Performance Objectives

- Given a team of employees, the doctor encourages them to demonstrate exemplary behaviour as medical professionals to drive a positive patient experience
- Given the clinic's business needs and employee characteristics, the doctor offers a motivating work environment to enrich the employee experience

Why this intervention?

To equip the Management team with the right knowledge, skills, and approach to motivate and guide the team towards achieving Job One.

Genre

Facilitator-led workshop

Type of resource: Instruction, practical tips for implementation, learning resources

Structure: Facilitator presentation, small group discussion, hands-on exercises, Q&A, participant guide with learning resources (digital)

Style: Informational, practical, engaging

Performer Expectations:

- Receive relevant and practical information on the topic that can be applied immediately
- Be engaged in the learning experience
- Have opportunities to brainstorm and discuss ideas with other participants
- Receive a participant guide and additional learning resources
- Have opportunities to ask questions and get answers
- Be provided with contact information for follow up questions

Medium

Online synchronous: This medium is most convenient for the Doctor and the General Manager who live in a small city and cannot travel to attend in-person workshops in major cities

- 👍 No travel cost, immediate engagement with the facilitator and peers; ability to ask questions and receive answers
- 👎 Possible technical issues and scheduling conflicts

Intervention 2

Patient Shadowing



LEARNING INTERVENTION

This intervention addresses the **information and knowledge gaps** by having the nurses and the clerks conduct patient shadowing to identify what is working and what could be enhanced about the clinic's existing care and service practices from the patient's perspective. The performance is addressed at the **organizational level** for all phases and types of performers.

Performance Objectives

Given a patient with a medical condition:

- the doctor provides excellent medical and diagnostic care that contributes to positive health outcomes for the patient
- the nurses provide personalized care that would result in a positive patient experience
- the clerks demonstrate awareness of their experience, concerns, and perspectives to provide excellent service that would result in a positive patient experience

Why this intervention?

To build awareness of patient experience at the clinic through natural experience and to activate the team's existing knowledge of patient care/service best practices.

Genre

Patient shadowing/observation

Resources: Patient selection criteria, script to gain patient consent, observation form (print) for the shadower

Structure: The clerks identify patients to be observed according to set criteria and gain consent for observation, a shadower follows the patient during the visit and fill out the observation form

Style: Professional, confidential

Performer Expectations:

- Receive guidance on how to select patients to be shadowed and communicate the request to the selected patients
- Be provided with instructions on what to watch out for during the observation and be provided with a form to fill out
- Shadowing to not interfere with the regular operation of the clinic
- Be informed of the findings from the shadowing
- *Patients:* Be asked for consent and be promised confidentiality

Medium

Face-to-face/Print: This would be the easiest way to implement this intervention as the team already works on-site with their patients

- 👍 A **cost-effective** and convenient way to collect patient experience data; easy to implement; print forms are easy to fill out for observation
- 👎 Not all patients consent to be shadowed; staff/patient behaviour may change due to being observed; an additional staff required to cover the shadower

Intervention 3

Patient Care and Service Success Stories



LEARNING INTERVENTION

This intervention addresses the **information, knowledge and motivation gaps** by having the team share their past and current patient care/service success stories to identify their individual and collective strengths as well as enabling factors. The findings from the shadowing exercise can also be discussed here. The performance is addressed at the **individual and organizational levels** for all phases and types of performers.

Performance Objectives

- Given a team of employees, the doctor encourages them to demonstrate exemplary behaviour as medical professionals to drive a positive patient experience
- Given a shared mission to drive positive patient experience at the clinic, the nurses maintain a harmonious and collaborative relationship with colleagues to improve patient experience
- Given a shared mission to drive positive patient experience at the clinic, the clerks engage in actions that contribute to improving patient experience

Why this intervention?

To understand what the team is capable of achieving when the right conditions are present. By understanding what worked well in the past and what is currently working, the team/the Doctor can establish a vision for the future (moving from the Discovery to the Dream phase of AI).

Genre

Guided discussion

Resources: Calendar invite, discussion prompts, meeting space, clinic closure notice for patients

Structure: The facilitator opens the conversation, clarifies the focus/goal of the discussion and sets ground rules; participants discuss in small groups and with the entire team; open-ended questions are asked

Style: Semi-structured, collaborative, inviting

Performer Expectations:

- Receive a meeting invite in advance
- Be given enough time to prepare ideas to share with the team
- Be encouraged to share opinions and discuss ideas
- The discussion to be facilitated and to end on time
- The clinic to close during the meeting and the patients to be notified in advance of the closure

Medium

Face-to-face: The discussion requires trust, engagement and participation, which is better accomplished in an in-person meeting

- 👍 It facilitates the discussion and sharing of ideas and opinions, establishes trust
- 👎 Not everyone feels comfortable sharing their ideas in a group setting; the clinic reception must close for the duration of the meeting

Intervention 4

Patient Experience Guiding Principles & Standards

ENVIRONMENTAL INTERVENTION: INFORMATION

Building on the discoveries from the earlier interventions, this intervention addresses the **information and motivation gaps** by having the team define principles that will guide their work and set patient experience standards that they hope to achieve. The performance is addressed at the **individual and organizational levels** for all phases and types of performers.

Performance Objectives

- Given a patient with a medical condition:
 - the doctor provide excellent medical and diagnostic care
 - the nurses provide personalized care that would result in a positive patient experience
 - the clerks demonstrate awareness of their experience, concerns, and perspectives to provide excellent service
- Given a team of employees, the doctor encourages them to demonstrate exemplary behaviour as medical professionals to drive a positive patient experience
- Given the clinic's business needs and employee characteristics, the doctor offers a motivating work environment to enrich the employee experience
- Given a shared mission to drive positive patient experience,
 - the nurses maintain a harmonious and collaborative relationship with colleagues to improve patient experience
 - the clerks engage in actions that contribute to improving patient experience

Why this intervention?

To provide clear expectations and standards related to patient experience. Rather than simply providing such guidelines, this intervention offers the team some autonomy in determining how they want to approach their performance improvement based on their strengths, values, and vision.

Genre

Team guiding principles & service/care standards

Resources: The guiding principles defines the clinic's shared values and expectations for attitudes and behaviours related to patient experience; the standards provide information on how patient care and service success would be measured at the clinic

Format: Contains a document title, name of the clinic/ department/ function, date, approval by the doctor, purpose, definition of terms, statements outlining the agreed-upon principles and values (guiding principles) or procedures (standards)

Style: Formal, structured, clear

Performer Expectations:

- Have the opportunity to contribute ideas and collaborate with colleagues to set principles and standards that represent their collective vision and aspirations
- Understand the performance expectations based on these documents
- The standards are reasonable and attainable

Medium

Digital and print: The document will be created digitally by the team and can be printed for ease of access

- 👍 Easy to create, modify and store; low cost (digital); flexible as it can be printed for ease of access; no known disadvantage

Intervention 5

Patient Care and Service Procedures

ENVIRONMENTAL INTERVENTION: RESOURCES

Building on the guiding principles and standards established, this intervention addresses the **resources gap** by having the team clarify its operational procedures to ensure the provision of empathetic and considerate care/service to create a positive patient experience at the clinic. . The performance is addressed at the **organizational level** for all phases and types of performers (ideally, performers find themselves in the neutral phase or higher by this stage).

Performance Objectives

- Given a patient with a medical condition:
 - the doctor provide excellent medical and diagnostic care
 - the nurses provide personalized care that would result in a positive patient experience
 - the clerks demonstrate awareness of their experience, concerns, and perspectives to provide excellent service
- Given a shared mission to drive positive patient experience,
 - the nurses maintain a harmonious and collaborative relationship with colleagues to improve patient experience
 - the clerks engage in actions that contribute to improving patient experience

Why this intervention?

To enable the team to perform consistently according to the expectations and standards they set in Intervention 4. The procedures will focus on patient care and service and may include processes for: how to conduct patient check-in/check-out (clerks), how to shorten patient wait time (nurses), how to demonstrate empathy and consideration through patient communication, how to deal with patient complaints or negative patient experience, etc.

Genre

Service and care procedures

Resources: The document defines a standard way of delivering care and service to patients to ensure a consistent, safe, and high-quality patient experience. The information can include general approaches as well as step-by-step processes to perform patient care and/or service

Format: Contains a document title, name of the clinic/ department/ function, date, approval by the doctor, purpose, definition of terms, required resources, statements outlining the agreed-upon procedures to be implemented by team members as well as considerations for risk control

Style: Formal, structured, clear, use of bullet points and short phrases to explain processes in a concise and actionable manner

Performer Expectations:

- Have the opportunity to contribute ideas and collaborate with colleagues to establish functional and efficient processes to accomplish care and service goals
- Have a clear understanding of what must be done to deliver positive patient experiences based on the documentation
- The processes are comprehensive and applicable

Medium

Digital and print: The document will be created digitally by the team and can be printed for ease of access

- 👍 Easy to create, modify and store; low cost (digital); flexible as it can be printed for ease of access; no known disadvantage

Intervention 6

Patient Question Checklist

ENVIRONMENTAL INTERVENTION: RESOURCES

This intervention addresses the **resources gap** for patient communication by providing patients with a checklist containing prompts for questions/concerns they want to address with the doctor. The performance is addressed at the **organizational level** for all types of performers. The performers should be in the neural phase or higher.

Performance Objectives

Given a patient with a medical condition:

- the doctor provides excellent medical and diagnostic care that contributes to positive health outcomes for the patient
- the nurses provide personalized care that would result in a positive patient experience
- the clerks demonstrate awareness of their experience, concerns, and perspectives to provide excellent service that would result in a positive patient experience & engage in actions that contribute to improving patient experience

Why this intervention?

To improve patient communication at the clinic. By providing a tool to empower the patients to express themselves, the team can better understand and address their needs, questions, and concerns.

Genre

Patient question checklist (Agency for Healthcare Research and Quality, 2013)

Resources: A card with prompts to formulate questions, instructions for the team and for the patients on how to use them

Format: Patients receive a card with the prompts upon check-in or at check out for the next visit. Patients fill out the card, which can be attached to the patient medical record (or patients can bring it to the consultation themselves). The cards are to be designed with the clinic's elderly patients in mind.

Style: Brief, clear, simple, easy to read, patient-centered language

Performer Expectations:

- Receive instructions on how the cards will be distributed to patients and used by various team members
- Receive guidance on how to communicate to patients about using the cards
- Patients to use the prompts to formulate or to remember their questions
- The card to facilitate patient communication

Medium

Print: A print medium is selected as the clinic does not have a digital system to manage patient records or visits.

- 👍 Easy to produce and distribute, easily attached to medical records
- 👎 It requires time to prepare and print the cards, added cost for printing, patients may forget to bring their cards

Intervention 7

Peer Observation & Feedback



ENVIRONMENTAL INTERVENTION: INFORMATION & SUPPORT

This intervention addresses the **information gap** by engaging the team in a process of peer observation and feedback. The performance is addressed at the **individual level** for all types of performers (mostly the nurses and the clerks). The performers should be in the neural phase or higher.

Performance Objectives

- Given a patient with a medical condition:
 - the doctor provide excellent medical and diagnostic care
 - the nurses provide personalized care that would result in a positive patient experience
 - the clerks demonstrate awareness of their experience, concerns, and perspectives to provide excellent service
- Given a team of employees, the doctor encourages them to demonstrate exemplary behaviour as medical professionals
- Given a shared mission to drive positive patient experience,
 - the nurses maintain a harmonious and collaborative relationship with colleagues to improve patient experience
 - the clerks engage in actions that contribute to improving patient experience

Why this intervention?

This intervention was selected to offer the team an ongoing opportunity to receive regular, timely, and relevant feedback on their performance.

Genre

Peer observation and feedback

Resources: Script to gain patient consent, observation and feedback criteria, feedback form

Format: The team gains patient consent if the observation happens during examination or consultation; a peer observer performs observation according to set performance criteria; feedback provided to the observee

Style: Professional, supportive

Performer Expectations:

- Receive instructions on how to communicate the observation request to patients as needed
- Have sufficient time to complete the observation and feedback
- Receive clear and achievable performance criteria in advance of the observation
- Have the option to add individual performance goals to the criteria
- Receive guidance on how to provide/ receive feedback
- Receive helpful, supportive and timely feedback
- To be able to perform in a non-threatening environment

Medium

Face-to-face and print: This would be the easiest way to implement this intervention as the team already works on-site with their patients

- 👍 A **cost-effective** and convenient way to collect performance data and provide feedback; easy to implement; print forms are easy to fill out for observation
- 👎 Not all patients may consent to be observed; staff/patient behaviour may change due to being observed; an additional staff is required to cover the observer

Intervention 8

Bi-Weekly Team Check-Ins



This intervention addresses the **information, resources, and motivation gaps** by allowing the team to collectively reflect on their performance improvement journey, share information, review survey results, problem-solve, evaluate and readjust their approach as needed. The performance is addressed at the **individual and organizational levels** for all types of performers. The performers should be in the neural phase or higher.

Performance Objectives

- Given a team of employees, the doctor encourages them to demonstrate exemplary behaviour as medical professionals to drive a positive patient experience
- Given the clinic's business needs and employee characteristics, the doctor offers a motivating work environment to enrich the employee experience
- Given a shared mission to drive positive patient experience,
 - the nurses maintain a harmonious and collaborative relationship with colleagues to improve patient experience
 - the clerks engage in actions that contribute to improving patient experience

Why this intervention?

This intervention was selected to introduce a monitoring process for the performance improvement initiatives. Furthermore, it's a moment for the team to discuss any concerns, receive and offer support, encouragement and feedback to each other.

Genre

Team Meeting

Resources: Calendar invite, meeting agenda, meeting space, clinic closure notice for patients

Structure: The Doctor/General Manager chairs the meeting; the team follows the agenda items for discussion; the team receive and provide updates, ask questions and receive responses; end the meeting with action items

Style: Structured, casual, collaborative

Performer Expectations:

- Receive a meeting invite and agenda in advance
- Be given an opportunity to suggest agenda items
- Be encouraged to share and discuss opinions and ideas
- Receive updates and/or action items
- The Doctor (or General Manager) to lead the meeting
- The meeting to end on time
- The clinic to close during the meeting and the patients to be notified in advance

Medium

Face-to-face: The discussion requires team participation, which is better accomplished in an in-person meeting

- 👍 It facilitates the discussion and sharing of opinions since the team is already on-site; the team can build trust and offer support to teach other
- 👎 Not everyone feels comfortable sharing their opinions in a group setting; the clinic reception must close for the duration of the meeting

Intervention 9

Online Patient Reviews

ENVIRONMENTAL INTERVENTION: INFORMATION

This intervention addresses the **information gap** by requesting patients to leave reviews publicly. The team communicates their commitment to providing high-quality patient care/service through a poster that would contain a link to an online review site. The clerks implement patient check-out/complaints handling procedures created during Intervention 5. The performance is addressed at the **organizational level** for all types of performers. The team has ideally reached high engagement/ high empathy phases when this intervention is implemented.

Performance Objectives

- Given a patient with a medical condition:
 - the doctor provides excellent medical and diagnostic care that contributes to positive health outcomes for the patient
 - the nurses provide personalized care that would result in a positive patient experience
 - the clerks demonstrate awareness of their experience, concerns, and perspectives to provide excellent service that would result in a positive patient experience
- Given a shared mission to drive positive patient experience at the clinic, the clerks engage in actions that contribute to improving patient experience

Why this intervention?

To collect feedback about the patient experience at the clinic and to attract new patients with positive reviews

Genre

Online reviews (with the option to leave review in a physical format)

Resources: Patient checkout and complaints handling procedures; a poster with a QR code that links to the online review platform; a profile on the online review platform; a physical board to leave patient comments

Format: Upon patient check-out, the clerks ask for patient feedback. If the response is positive, the clerks request patients to leave a review. If the response is negative, the clerks address patient concerns and point them to the appropriate resource. Patients access online review platform to rate their experience and leave comments (optional).

Style: Clear and inviting (poster); easy to navigate and fill out (review)

Performer Expectations:

- Receive instructions on how patients can access and fill out the review
- Have clear procedures in place to address potential negative patient experiences and/or reviews
- Patients to provide honest (but ideally positive) reviews about their experience at the clinic
- Monitor review results periodically to identify areas for improvement
- Some patients may expect to receive a response from the clinic on to their review

Medium

Online: Selected for the convenience of access and publicity. Patients can also leave their review comments physically to be displayed in the lobby.

- 👍 Convenient to collect and monitor reviews; visibility
- 👎 Not all patients have access to a mobile phone that can read QR codes or feel comfortable leaving an online review; confidentiality concerns

Intervention 10

Team Appreciation Event (End-of-Year Team Lunch)



EMOTIONAL INTERVENTION

This intervention addresses the **incentives and motivation gaps** by providing an occasion for the clinic to celebrate its employees. This would be an annual event held at the end of the year. The performance is addressed at the **individual level** for all types of performers. The performers should be in the neural phase or higher.

Performance Objective

- Given a team of employees, encourage them to demonstrate exemplary behaviour as medical professionals to drive a positive patient experience
- Given the clinic's business needs and employee characteristics, offer a motivating work environment to enrich the employee experience

Why this intervention?

This intervention is selected to motivate the employees by recognizing their commitment and efforts during the year.

Genre

Team Incentive

Resources: Invitation, thank you note, food, drinks, gift, venue,

Format: The team will have lunch together and employees receive small gifts and a personalized thank you note as a token of appreciation. Employee milestones (i.e., 5, 10, 15, 20-year work anniversaries) are also celebrated at the event.

Style: Motivating, appreciative, celebratory

Performer Expectations:

- Receive invitation in advance of the event
- Have a few words from the Doctor to kick off the event
- Receive food and beverage that meet their dietary restrictions
- Have the chance to socialize with colleagues
- Get paid time off to attend the event
- The venue is accessible (re: location and physical accessibility)
- Feel valued and appreciated for their work and achievements during the year

Medium

Face-to-face: This is a moment of team building and celebration. As such, an in-person event would be the most appropriate (especially since the team already work on-site)

- 👍 It provides an opportunity for the team to come together to celebrate, strengthening their relationship and engagement
- 👎 The clinic has to close during the event

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