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Introduction

The Guide to Improving Patient Safety in Primary Care Settings by Engaging Patients and Families (the Guide) is a resource to help primary care practices partner with patients and their families to improve patient safety. Threats to patient safety in primary care include breakdowns in communication; fragmentation of care; issues surrounding medication management, including challenges in filling, prescribing, and adhering to medicines; and breakdowns in diagnosis and treatment. These threats may be mitigated by enhancing patient and family engagement.

The Guide is intended for clinicians and primary care practices new to patient and family engagement. For those practices that are already actively engaging patients and families, but looking to further strengthen engagement, this document provides additional resources.

Shared Decisionmaking

Shared decisionmaking is a collaborative process that allows patients and their clinicians to make health care decisions together. It considers the current clinical evidence about treatment options and engages patients and families in a discussion of those options in the context of the patient's individual values, beliefs, and preferences.

Shared decisionmaking has demonstrated effectiveness in improving decisionmaking around medications, alternative treatments, and chronic disease management and self-management strategies. Toolkits and resources such as the SHARE Approach from the Agency for Healthcare Research and Quality (AHRQ) and decision aids support the patient-provider partnership in care decisions.

Shared Decisionmaking Resources	Web Address
AHRQ case study on shared decisionmaking	https://www.ahrq.gov/sites/default/files/wysiwyg/professionals/quality-patient-safety/patient-family-engagement/pfeprietarycare/shareddec-1.pdf
AHRQ SHARE Approach to shared decisionmaking	https://www.ahrq.gov/professionals/education/curriculum-tools/shareddecisionmaking/index.html
ABIM Foundation Choosing Wisely® initiative to help physicians and patients partner in medical decisionmaking on tests, treatments, and procedures	http://www.choosingwisely.org/

Patient and Family Advisory Councils

A Patient and Family Advisory Council, or PFAC, is an approach to partner patients and families with members of the health care team to guide practice improvements. The PFAC itself becomes an agent for change. Clinicians gain insight on the care experience from the patient and family perspective. Patients and families in turn gain perspective on the challenges within the practice of health care. This open dialogue creates a community of partnership with a common goal of improving the care experience for all patients and families.

PFAC Resources	Web Address
AHRQ case study on PFACs in primary care	https://www.ahrq.gov/sites/default/files/wysiwyg/professionals/quality-patient-safety/patient-family-engagement/pfeprimarycare/partnering-1.pdf
AHRQ guide for developing community-based patient safety advisory councils	https://www.ahrq.gov/sites/default/files/wysiwyg/professionals/quality-patient-safety/patient-safety-res69(t)-27.5(i)1(l)-3g(en8

Open Access to Medical Notes

Patients can be engaged in their own care by having access to their medical records. OpenNotes[®] is a leading approach to enhancing patient and clinician communication by providing patients with access to the medical record. This

Embracing Patients as Partners

The National Patient Safety Foundation's Universal Patient Compact™ defines elements of effective partnerships between

Team-Based Care

Team-based care is defined by the National Academy of Medicine (formerly known as the Institute of Medicine) as “... the provision of health services to individuals, families, and/or their communities by at least two health providers who work collaboratively with patients and their caregivers—to the extent preferred by each patient—to accomplish shared goals within and across settings to achieve coordinated, high-quality care.”¹

Team-based care is a transformative method of delivering care that emphasizes teamwork centered around the patient. Engaging patients and their family members in a team-based care approach improves care quality, safety, and satisfaction for patients, clinicians, and community. There are several models of team-based care. Common elements include changes in workflow, communication, and access to care to help practices better manage preventive and chronic care services to meet the needs of the practice’s patient population.

1. Schottenfeld L, Petersen D, Peikes D, Ricciardi R, Burak H, McNellis R, et al. Creating Patient-centered Team-based Primary Care | PCMH Resource Center [Internet]. AHRQ Pub No. 16-0002-EF. March 2016 [cited 2017 Jan 20]. Available from: <https://www.pcmh.ahrq.gov/page/creating-patient-centered-team-based-primary-care>

Team-Based Care Resources	Web Address
AHRQ case study on team-based care	https://www.ahrq.gov/sites/default/files/wysiwyg/professionals/quality-patient-safety/patient-family-engagement

American Medical Association's STEPSforward™

The American Medical Association provides resources for physicians and practices to improve the quality, safety, and experience of care. A series of modules on topics ranging from workflow and process changes to engage patients and families

Decision Aids

Patient decision aids are tools that help patients and their caregivers become involved in decisionmaking. They provide information about treatment options, including benefits, risks, and outcomes, to help clarify how each option aligns with patients' personal values. They are designed to complement, rather than replace, counseling from a health care clinician and are an important component of shared decisionmaking.

Decision Aids Resources	Web Address
Ottawa Health Research Institute's searchable inventory of decision aids for shared decisionmaking	https://decisionaid.ohri.ca/
Web site clearinghouse of option grids (decision aids) available for several diseases	http://optiongrid.org/

Motivational Interviewing

Motivational interviewing is a method that works to facilitate and engage motivation within a patient or family member to change behavior. Motivational interviewing is a goal-oriented, patient-centered communication style for eliciting behavior change by helping patients to explore and resolve ambivalence to health behavior changes. A core element of motivational interviewing is collaboration between the clinician and the patient.

Motivational Interviewing Resources	Web Address
University of Massachusetts Web site with information and training resources on motivational interviewing	http://www.umassmed.edu/cipc/motivational-interviewing/intro-to-mi/
AHRQ resources and case study on motivational interviewing to support patient engagement in chronic disease management	https://www.ahrq.gov/professionals/prevention-chronic-care/improve/community/obesity-pcpresources/obpcp3.html
AHRQ resources and training to advance physicians' communication skills	https://www.ahrq.gov/cahps/quality-improvement/improvement-guide/6-strategies-for-improving/communication/strategy6gtraining.html

Health Literacy

Health literacy is the degree to which individuals have the capacity to obtain, process, and understand basic health information and services needed to make appropriate health decisions. Strategies to improve a practice's awareness

Health Literacy Resources	Web Address
AHRQ Health Literacy Universal Precautions Toolkit	https://www.ahrq.gov/professionals/quality-patient-safety/quality-resources/tools/literacy-toolkit/index.html
AHRQ resources to improve cultural competence	https://www.ahrq.gov/topics/topic-cultural-competence.html

