

The Guide to Improving Patient Safety in Primary Care
Settings by Engaging Patients and Families

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Be Prepared
To Be Engaged

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What Is the Be Prepared To Be Engaged Strategy?

The Be Prepared To Be Engaged strategy is an effort to help patients and their families prepare for and become more fully engaged in their medical appointments. Several tools are available to patients and families as part of the strategy. The goal is to help them join their own health care team—to *be ready* for the appointment, to *speak up*, to *ask questions*, to *take notes*. Tools are also available for clinicians and practice staff to help them encourage and reinforce patient preparation and engagement.

Why Use the Be Prepared To Be Engaged Strategy?

Patients often arrive at a primary care visit unprepared to discuss their current symptoms, their medical history, their medications, and their questions. In addition, time is limited in a primary care visit. Lack of preparation and limited time can lead to an inadequate exchange of information between the patient and clinician. Communication breakdowns between the patient and the clinician or the patient and the practice staff can result in medical error.

When patients and their families are well prepared for primary care visits, the visit time is used more effectively. Patients and families are more engaged in their care, they are better able to communicate their questions and concerns, and they are more likely to leave the visit with an understanding of their diagnosis and care plan, all of which can improve patient safety.¹⁻⁴

Tools for Be Prepared To Be Engaged

The Be Prepared To Be Engaged strategy includes tools for patients and families, clinicians, and practice staff.

For Patients and Families

Material	Uses	Description and format
Patient Prep Card	Help patients and families prepare for a medical appointment.	

For Clinicians

Material		



Patient Prep Card

1. Mail the Patient Prep Card to patients before their appointment and ask them to fill in the card and bring it with them. Alternatively, you can give the Patient Prep Card to patients

Step 5. Evaluate and refine your process.

Observe whether patients or family members are filling in the Patient Prep Cards and whether clinicians are using the cards during appointments. Observe whether patients or family members are using the Patient Note Sheets. Refine your implementation process as needed. It may require increased effort from clinicians or practice staff to engage patients and families.

References

1. Lucchiari C, Pravettoni G. The role of patient involvement in the diagnostic process in internal medicine: a cognitive approach. *Eur J Intern Med* 2013;24(5):411-5. [doi:10.1016/j.eurjim.2013.05.024](#)

