

# Warm Handoff Plus

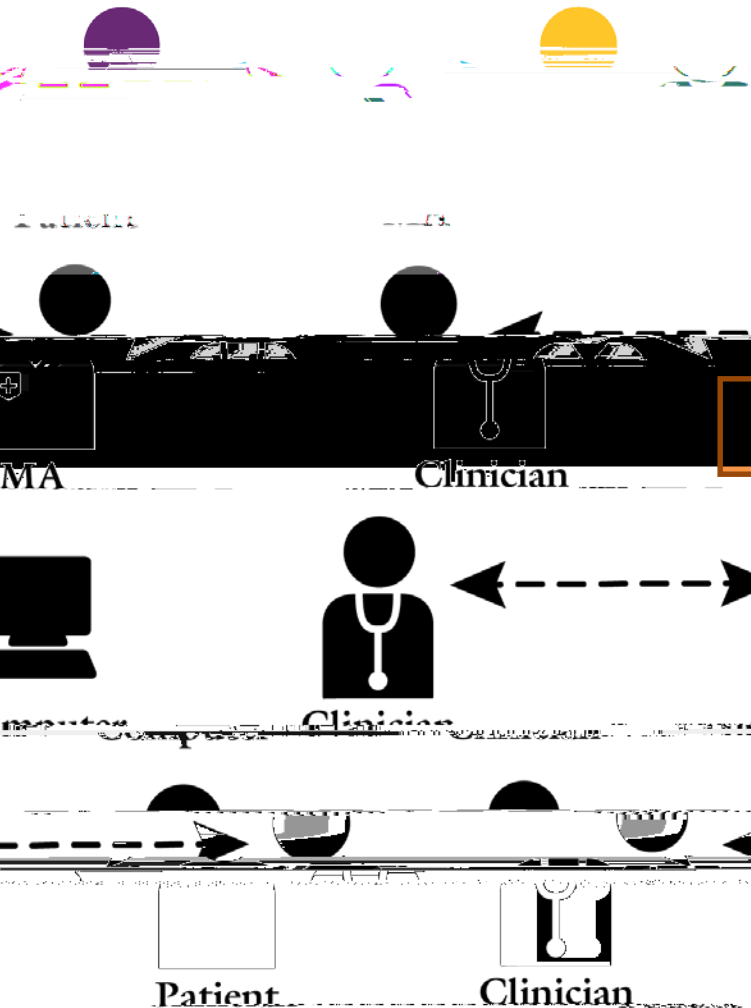
AHRQ

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

# What is a Warm Handoff Plus?

# Why is it important?

## Transactional Communications



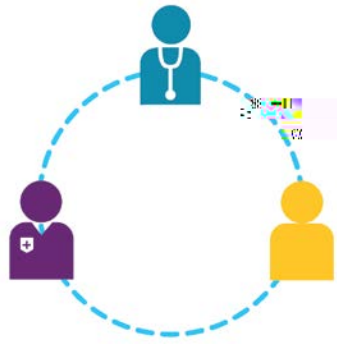
## Collaborative Communications



# How can it help me?

- **Improves communication** both with the patient and among the healthcare team
- Makes communication **more efficient**
- **Prevents errors**
- Improves the clinician and patient **relationship**

# When should I use it?



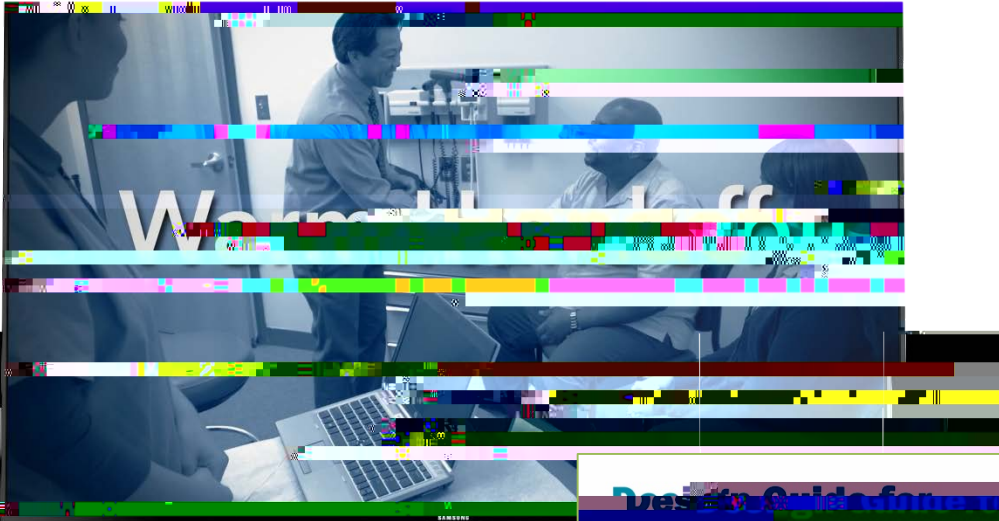
- Transitions for Warm Handoff Plus

*Customize this slide to match your practice's implementation strategy.*

# How do I use it?



# What tools are available?



## Warm Handoff Plus

Role Play Scenario

### Facilitator Instructions

1. As facilitator, play the role of the clinician.
2. Request a volunteer to play the role of the staff member. The staff member will engage in Warm Handoff Plus with the



## Checklist: Conducting a Warm Handoff Plus

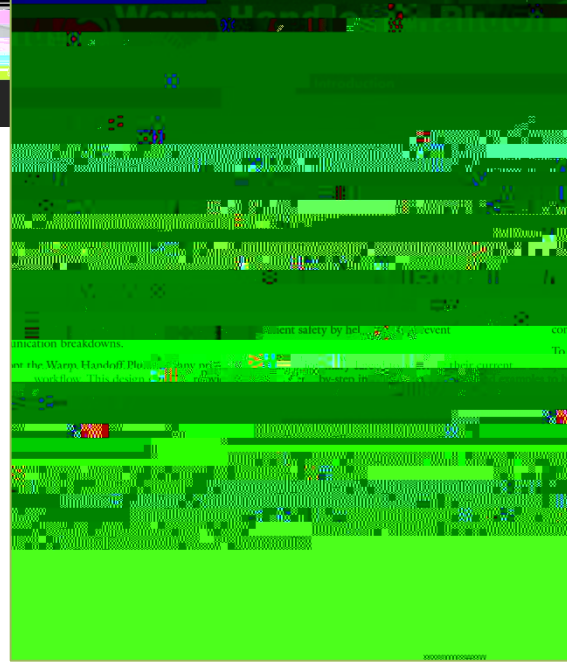
### Present to the Clinician

the visit.  
goals and health concerns.  
MI/weight, significant changes.  
issues (e.g., refills, side effects).  
reports:  
visits.  
discharge summary.

### patient

you like to add?

## Does it Guide for you



Information about the scenario. Page

training group in a learning

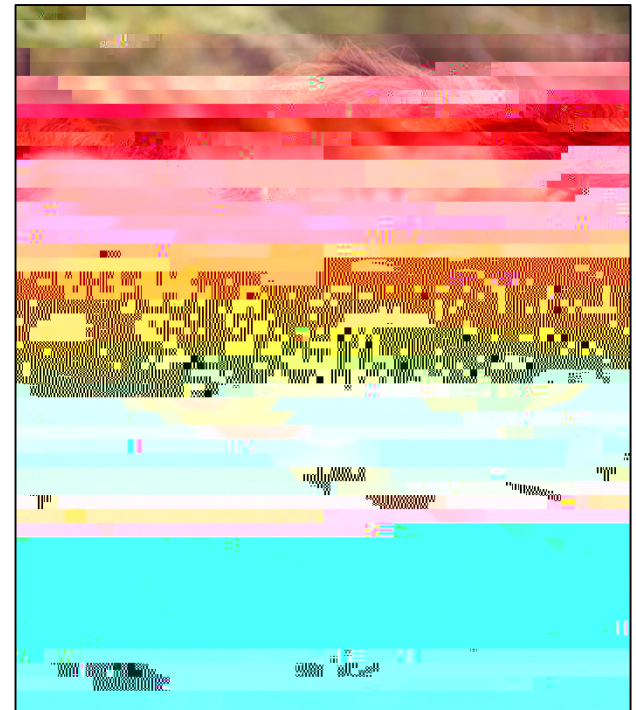
The Guide to Improving Patient Safety in Primary Care Settings by Engaging Patients and Families





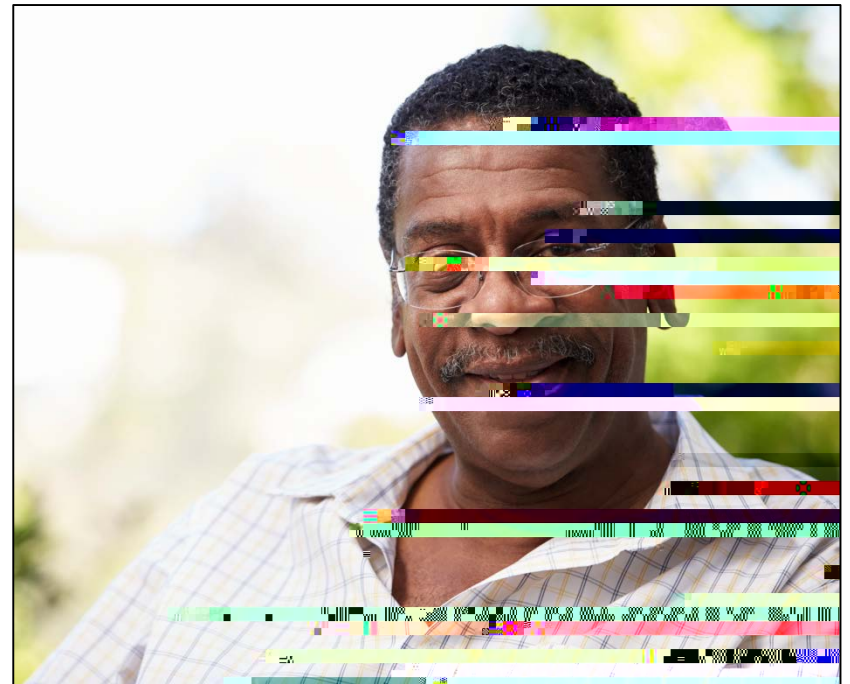
# Scenario 2

- Handoff from MA to clinician
- Mrs. Sanchez – 63-year-old female with type II diabetes
- Here for annual physical
- Temp 98.6 F, BP 137/81, weight 146 lb, down 10 lb, BMI of 25
- Weight loss attributed to daily walking, more vegetables, fewer sweets
- HbA1C of 6.5
- Taking metformin 1,000 mg QD after dinner as prescribed, no other meds



# Scenario 3

- Handoff from MA to lab technician
- Mr. Bauman– 61-year-old male with history of hypertension
- Here for annual physical
- Orders
  - Flu vaccine
  - CBC
  - Lipid panel
  - UA



# How will we evaluate it?

- Corrected miscommunications
- Satisfaction
- Reported use:
  - Warm handoff
  - With patient

*Customize this slide to match your practice's implementation strategy.*

