



Speaker



Scientific Director, Quality & Safety
Co-PI, AHRQ Guide to Improve Patient Safety
in Primary Care Settings by Engaging
Patients and Families

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No financial conflicts of interest to
disclose.

Objectives

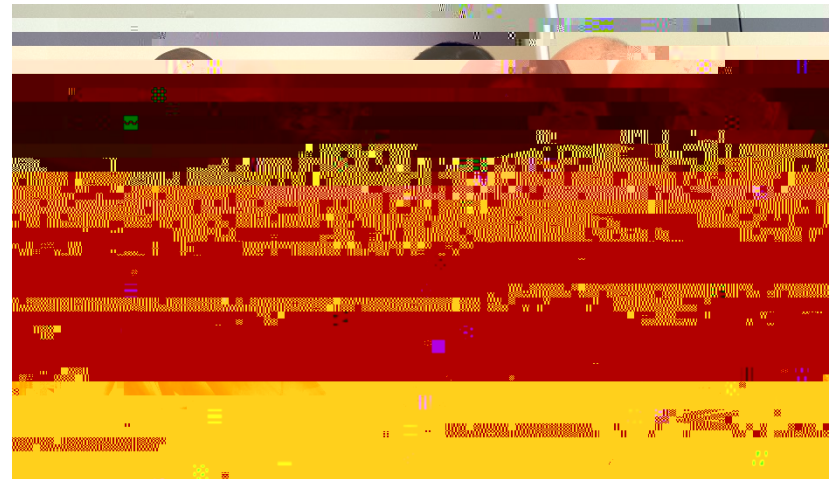
- Review the key threats to patient safety in primary care settings and interventions to engage patients and families to improve safety
- Describe the role and value of the Warm Handoff strategy in improving patient safety
- Identify strategies for implementing the Warm Handoff strategy in primary care settings

Guide – Project Goals

- Meaningful engagement with

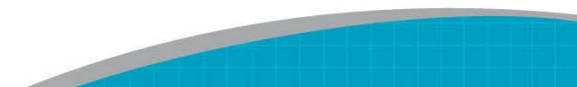
Key Project Deliverables

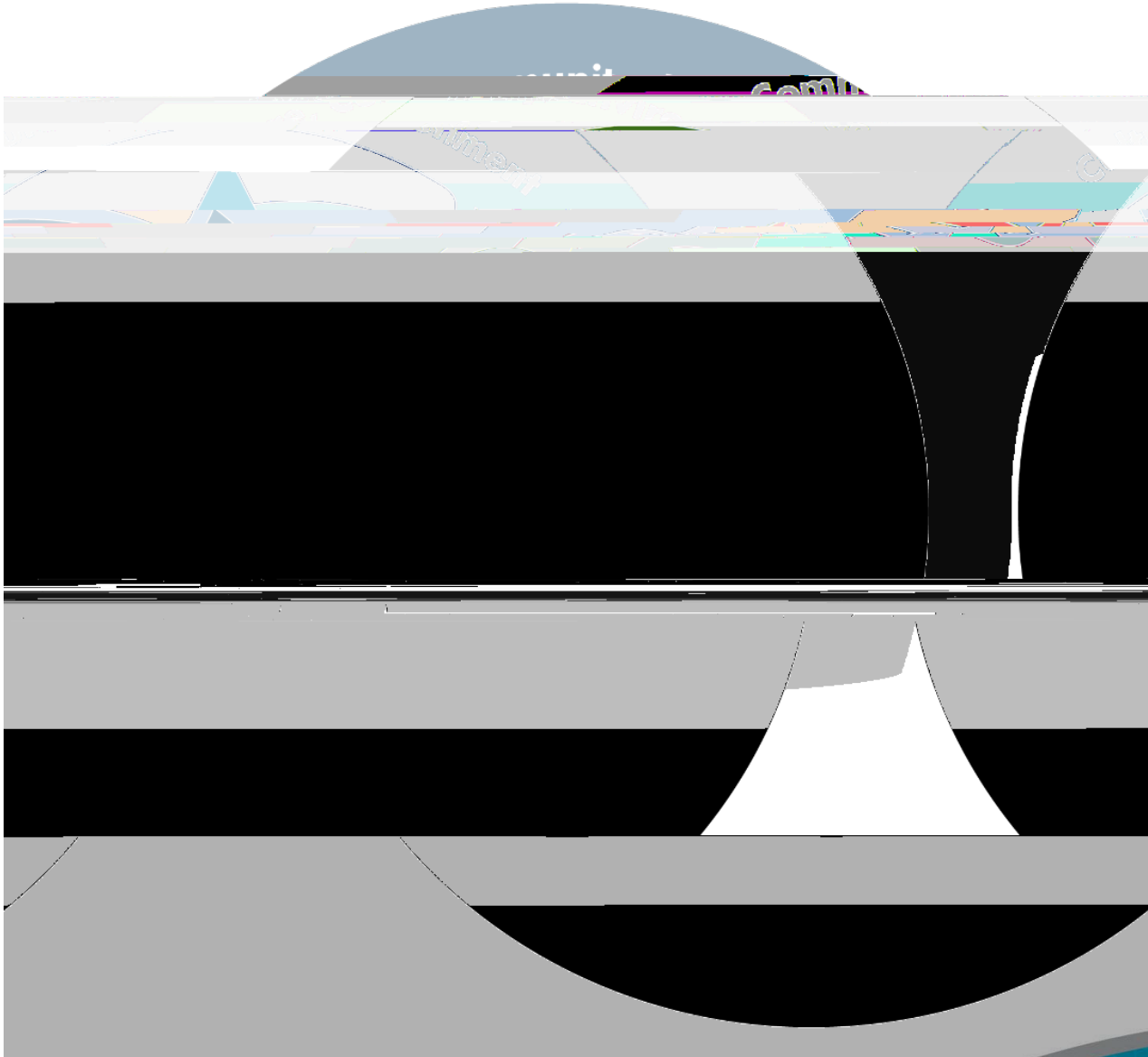
- Environmental Scan
- Four Case Studies of Exemplar Practices
- Four Interventions to Improve Safety by PFE
- Final Guide





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- Teach-Back
- Be Prepared to be Engaged
- Medication Management
-



- Strategy to encourage bi

Why Use the Warm Handoff Strategy?

- Communication breakdowns are a key threat to patient safety.
- BDC /TT1 1 Tf3D6f1 Tc3D8So /LBody A MCID 13 BDC /T

When should a Warm Handoff be used?

- After rooming patients
- After the patient exam
- Anytime during transitions in care such as with the
 - Scheduler
 - Lab technician
 - Nurse educator
 - Other team members

Getting Started

Step 1

{ Identify a Champion and get Leadership Buy-in

Step 2

{ Develop processes for using Warm Handoff

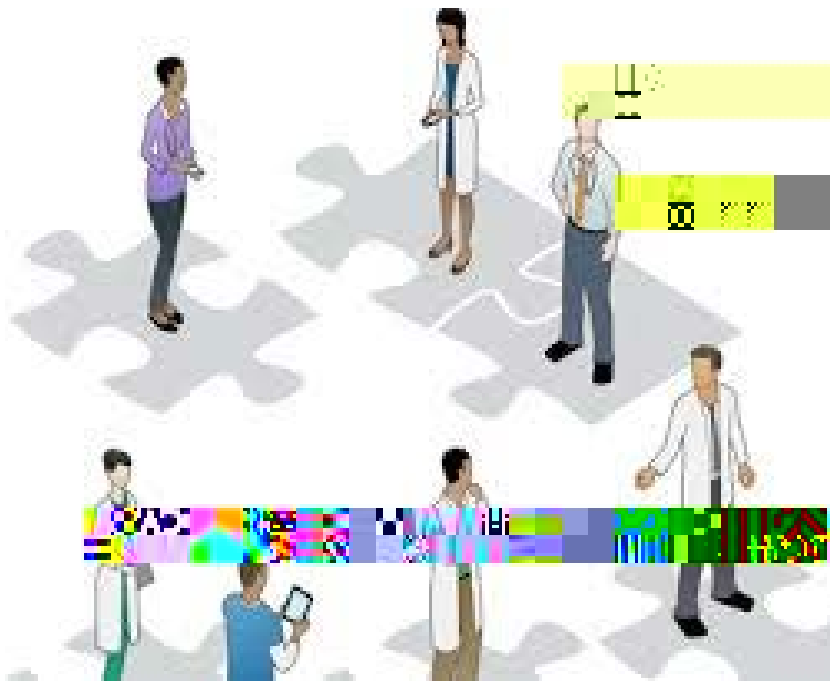
Step 3

{ Train team members and initiate implementation

Step 4

{ Integrate

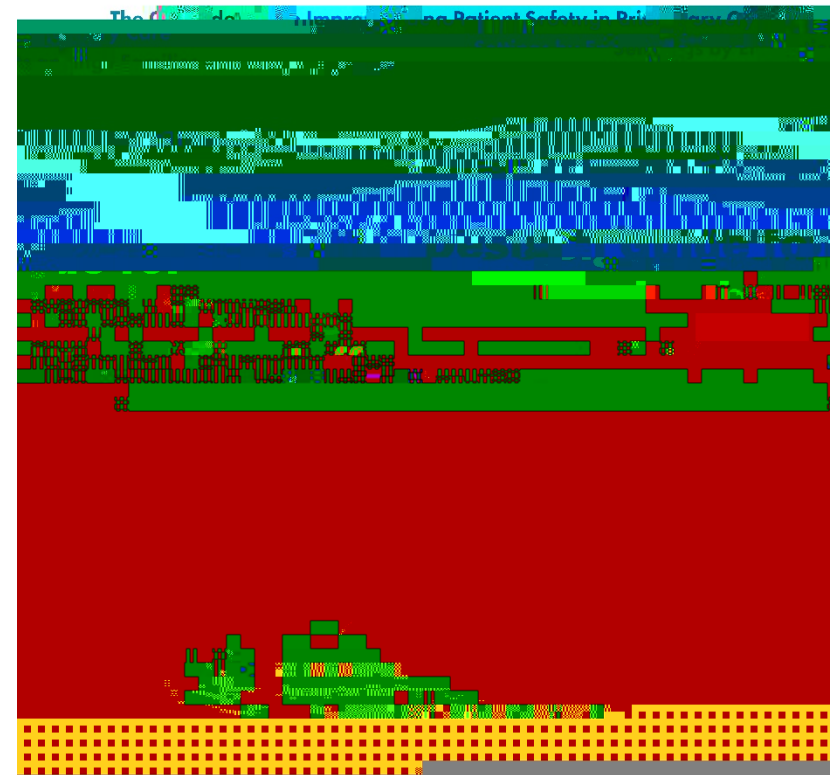
Step 1. Leadership Buy-in



- Identify a Warm Handoff practice champion
- Obtain leadership buy-in and support
- Identify a process improvement team
 - ™ Engage a patient or two in developing your plan

Step 2. Design Implementation

- Identify a team to help design processes for each of the Warm Handoff strategy tools
- Identify resources for implementation



Step 3. Orient Practice Staff

- Information about the Warm Handoff Strategy for:
 - Practice Staff
 - Clinicians
- Provide overview of resources available and how to use Warm Handoff to enhance engagement

A Warm Handoff in Action



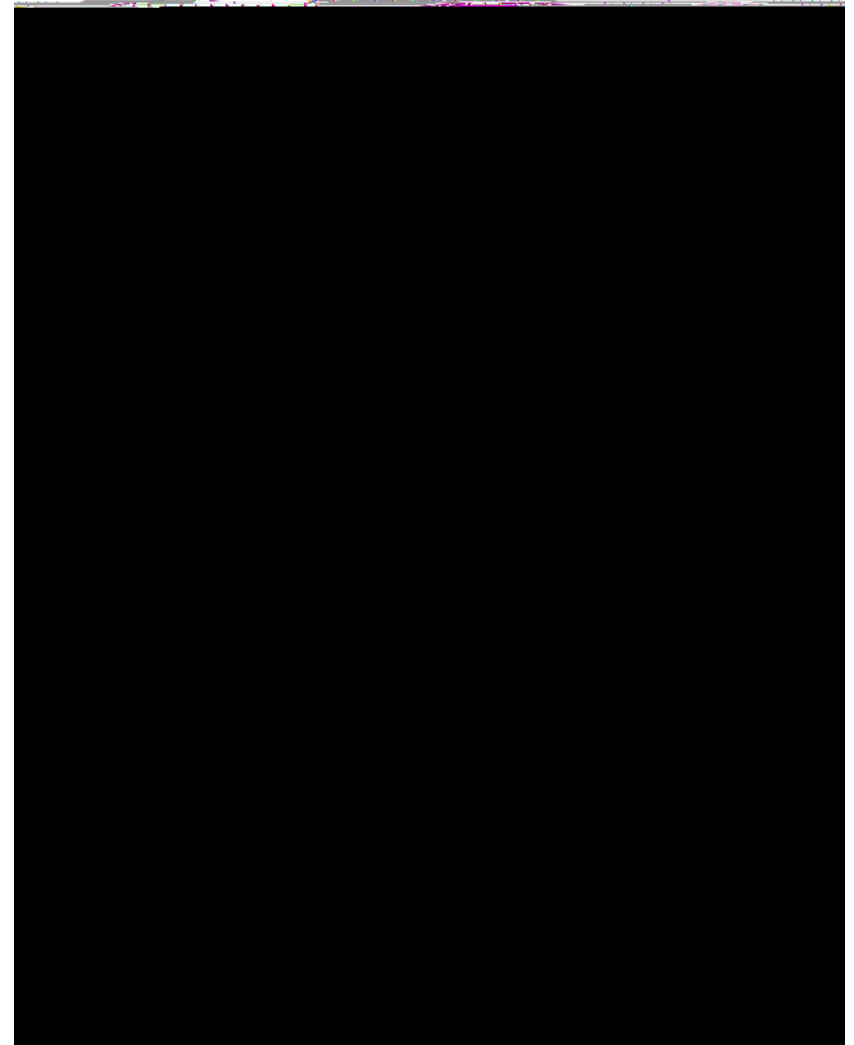
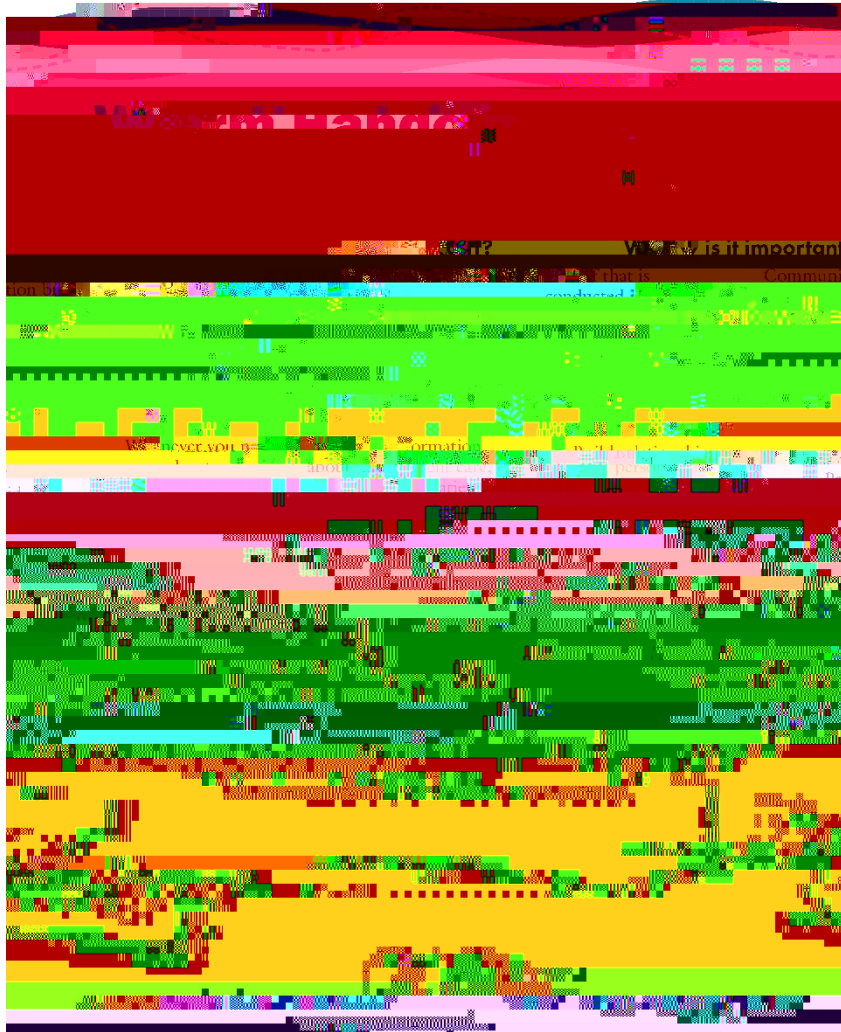
<https://www.youtube.com/watch?v=ZTL5ltGMUIQ&feature=youtu.be>

Checklist for Staff



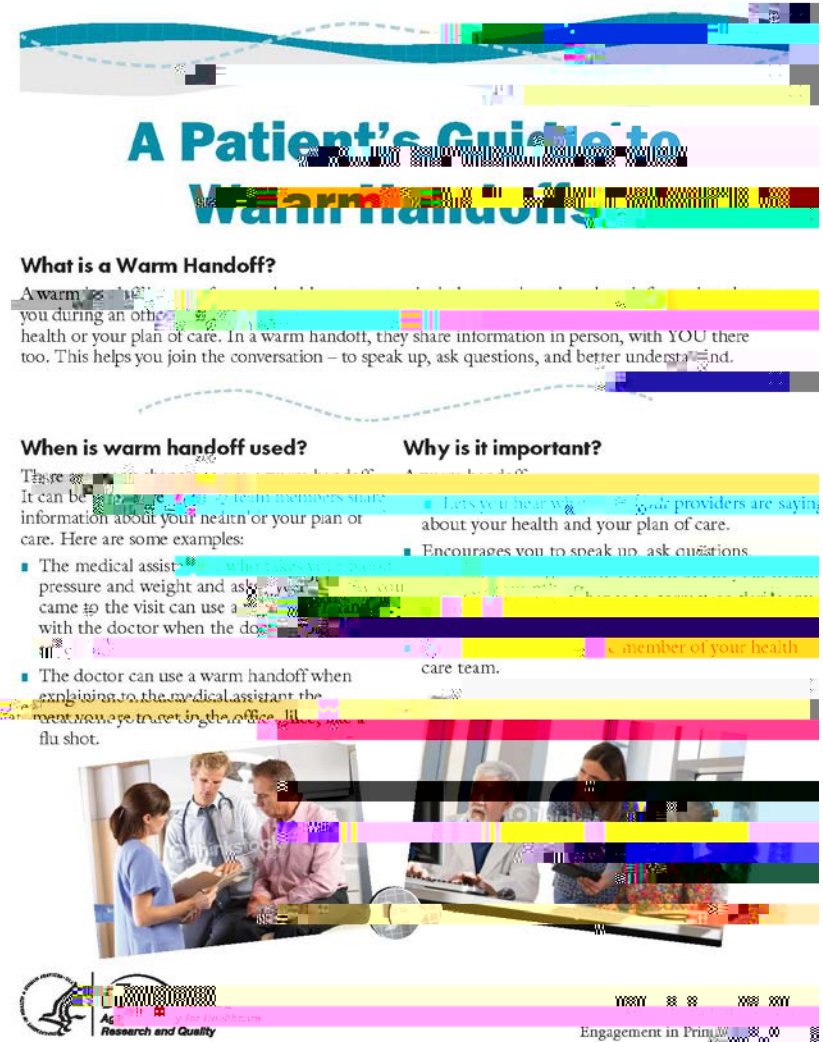
- Checklist to help support adoption
- Guides the elements of the conversation between the Clinician and Practice Staff
- Asks the Patient to engage in the conversation

Clinician and Staff Handouts



Step 4. Orient Patients

- Orient the patient to the Warm Handoff Strategy
 - Patient Fact Sheet
- Discuss why it is important
- Reinforce the need for patients to engage in discussions about their care



A Patient's Guide to Warm Handoffs

What is a Warm Handoff?
A warm handoff is when you and your provider share information about your health or your plan of care. In a warm handoff, they share information in person, with YOU there too. This helps you join the conversation – to speak up, ask questions, and better understand.

When is warm handoff used?
There are many times when you and your provider can use a warm handoff. It can be used when you and your provider are in the same room. Here are some examples:

- The medical assistant who takes your blood pressure and weight and asks you how you came to the visit can use a warm handoff with the doctor when the doctor comes to see you.
- The doctor can use a warm handoff when explaining to the medical assistant the next steps to get in the office, like getting a flu shot.

Why is it important?

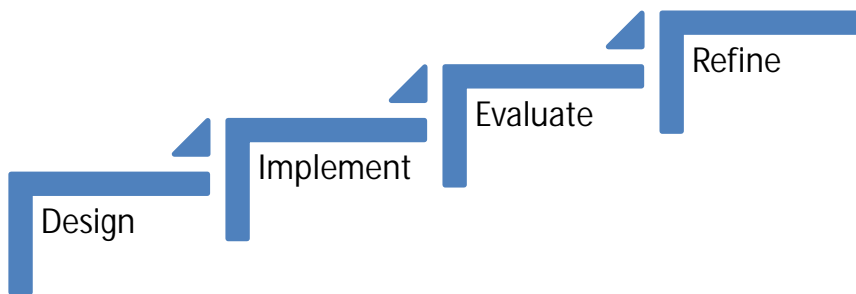
- Lets you hear what your providers are saying about your health and your plan of care.
- Encourages you to speak up, ask questions, and share your thoughts.
- Lets you know who is a member of your health care team.



Academy for Research and Quality

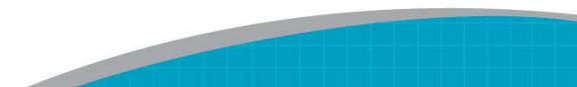
Engagement in Primary Care

Step 5. Evaluate & Refine



- Observations
- Team debriefs
- Simple counts





How Can I Get Started?

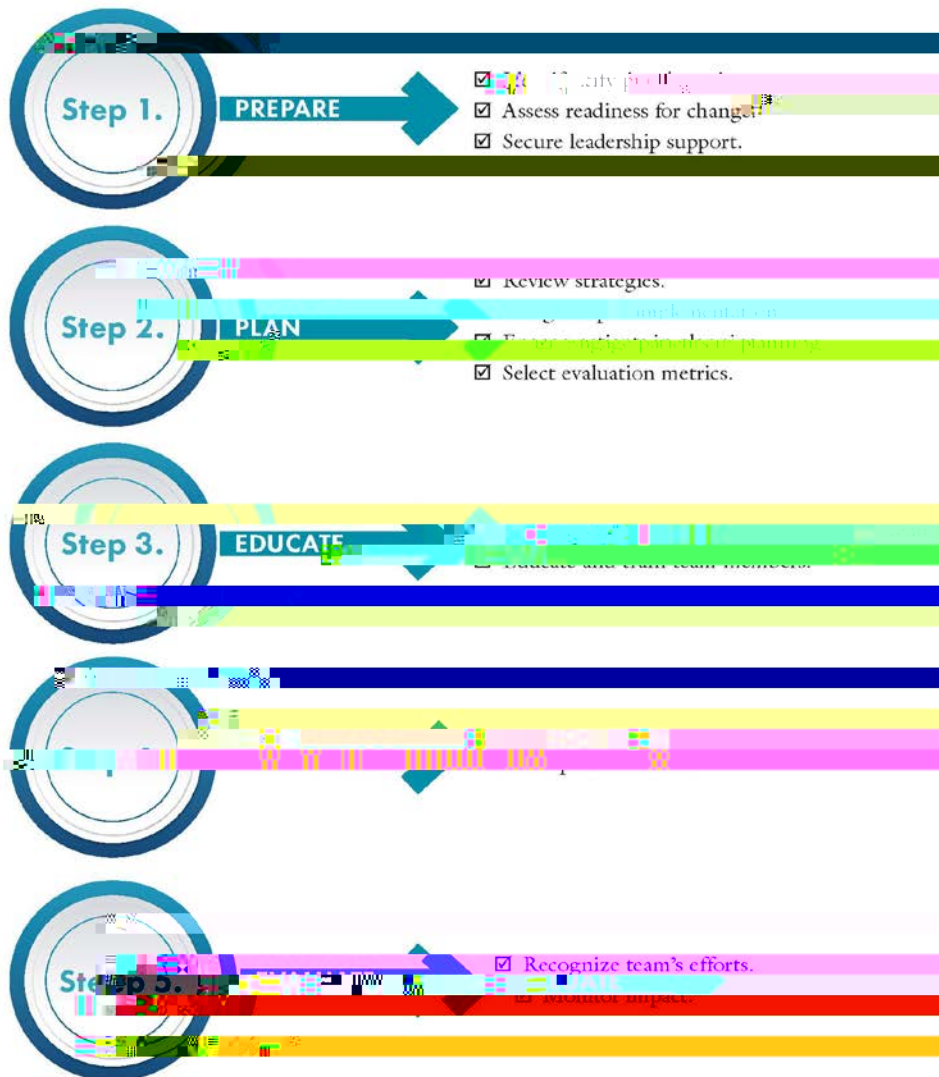


Figure 1. Implementation Process

