



Be Prepared To Be Engaged

AHRQ

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



Agency for Healthcare Research and Quality

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Speaker



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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 Be Prepared to Be Engaged strategy in improving patient safety
- Identify strategies for implementing the Be Prepared to Be Engaged strategy in primary care settings

Guide – Project Goals



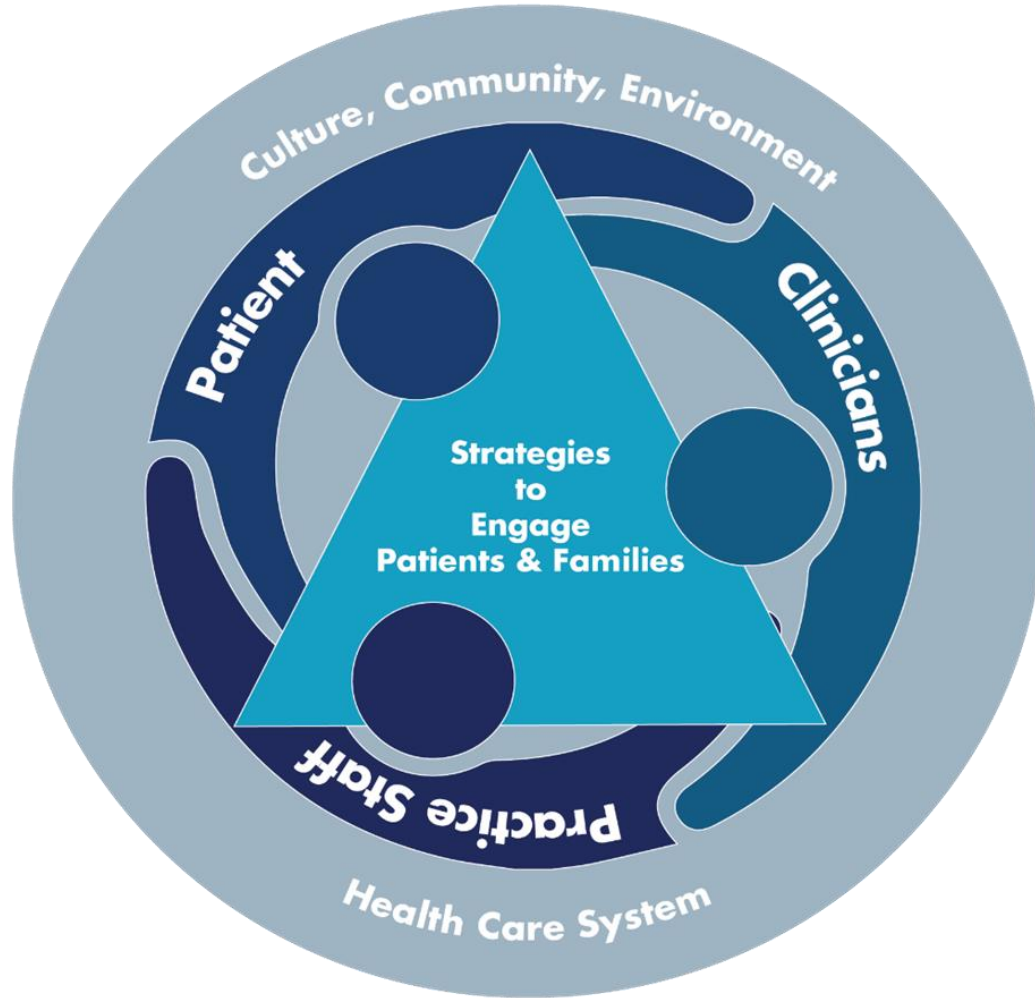
- Meaningful engagement with patients and families in ways that impact safety, not just quality
- Based on evidence
- Tools that are easy to use
- Tools for practices who have not done much in this area

Key Project Deliverables

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



Patient & Family Engagement in Primary Care



Patient Safety in Primary Care

Did you know...Patient safety issues in primary care are real.

Annually,

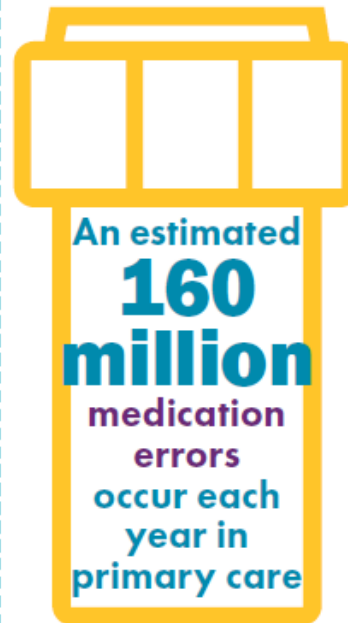
1 in 20



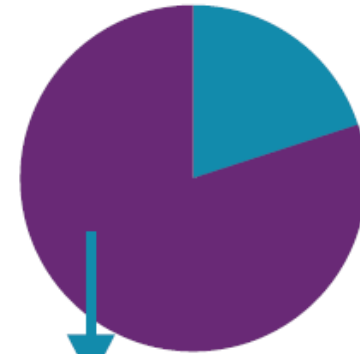
outpatients experiences a **diagnostic error**



55%
of patients said
diagnostic errors
were a chief concern
in outpatient visits



An estimated
160 million
medication
errors
occur each
year in
primary care



80%
of information shared
in a primary care visit is
immediately forgotten
by patients

1 in 9

ED admissions
are related to an
adverse drug event



Four Interventions

- **Be Prepared to be Engaged**
- **Create a Safe Medicine List Together**
- **Teach-Back**
- **Warm Handoff Plus**



Be Prepared To Be Engaged

- Facilitates visit agenda setting for patients and clinicians.
- Improves visit efficiency and safety and promotes effective communication.



Create a Safe Medicine List Together

- Creates a complete and accurate medicine list, which is the first line of defense against medication errors.
- Leads to improved patient outcomes, adherence, and safety.



Teach-Back

- Improves communication and health literacy.
- Ensures the effective transfer of information shared with patients.



Warm Handoff Plus

- Promotes collaborative communication, engaging the patient as part of the team.
- Supports handoff within the practice to reduce communication drops during transitions.

What is Be Prepared to Be Engaged?



Be ready



Ask questions



Speak up

**What they want
to talk about**

**Their
questions**

**Their health
goals**

Why is it important?



- There are significant time pressures in primary care and patients often arrive unprepared.
- The strategy helps patients come better prepared so time is used more effectively.

How can it help me?

When patients **wrote down an agenda** before their primary care visit, **74% of clinicians** and **79% of patients** agreed that communication during the visit **improved**.

Over **80% of the clinicians** in the study *wanted patients to continue* to **write down an agenda**.

What tools are available?

Be Prepared. Be Engaged.

Today I want to talk about...

1. _____
2. _____
3. _____

I have questions or concerns about...

My medicines My medical tests My treatments

My health goals are...



Be Prepared to Be Engaged

Scripts

Provide the Be Prepared Note Sheet to a patient

Please use this note sheet to write down what you want to talk about with [clinician] today. You can write down your concerns, your questions, and your health goals.

When you finish filling out the note sheet, just hand it to [clinician] when [he/she] comes into the exam room. [Clinician] will use what you write to make sure to discuss your questions and concerns.

Help a patient think about what to write on a Be Prepared Note Sheet

Use the note sheet to organize your thoughts. What do you want to make sure you talk about

if you have any questions about your medicine or your tests or your treatment? If so, write those down. Do you have any health goals you want to work toward? Maybe you want to sleep better or quit smoking or better control your [condition].

Write down anything to ask or tell your doctor, that's okay. But maybe you can take a few minutes to think about it while you wait.

Help a patient fill out a Be Prepared Note Sheet

Write down your thoughts while you talk.

Do you like to make sure you talk about today? What questions do you want to ask the doctor? Do you have any health goals today? Maybe you want to sleep better or quit smoking or better control your [condition]?

Write down anything to ask or tell your doctor, that's okay.

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



Be Prepared. Be Engaged.



Be ready

Write down the most important things you want to talk about during your visit.



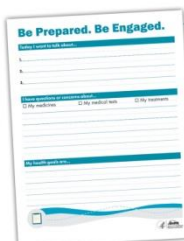
Ask questions

Write down your questions. You can find a Question Builder on the Agency for Healthcare Research and Quality website at <https://go.usa.gov/xQx6w>



Speak up

Write down your health goals.



Ask your care team for a **Be Prepared Note Sheet** to help you get ready for your visit.

It's a way to:

- Help you remember everything you want to discuss.
- Let your healthcare team know what's important to you.



Be Prepared Note Sheet

Be Prepared. Be Engaged.

Today I want to talk about...

1.

3.

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How do I use it?

- Identifying patients
- Handing out
- Asking about
- Offering to help fill out
- Reviewing and discussing

Getting Started with Be Prepared

Implementation Quick Start Guide

Be Prepared To Be Engaged



1—Review intervention and training materials

- Understand the purpose, use, and benefits of the Be Prepared strategy.
- Review the training toolkit.

2—Make decisions for your implementation

Obtain materials

- Will you print materials in the office or order printing?
- Who will be responsible for maintaining a supply?
- Do you need Spanish versions of the patient materials?

Set scope

- Which patients will receive a note sheet? All patients? A specific patient population?

Establish workflow

- When will you give patients the note sheet?
- Who will give patients the note sheet?
- Where will you document Be Prepared in the EHR?

Encourage use of the sheet

- How will you encourage patients to use the note sheet?
- Will you put up the posters? If yes, where?
- Will you ask staff to help patients fill out the note sheet?
- How will clinicians use the note sheet during a visit?

Identify champions

- Who will champion the strategy within each role on the team?

3—Customize training for your practice

- Customize the training materials to reflect your decisions.

4—Train team members

- Use staff meetings and huddles.
- Strive for training meetings of at least 15 minutes.
- Provide staff with scripts.



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

Step 1. Identify a Champion and Get Leadership Buy-in

- Identify a Be Prepared to Be Engaged practice champion
- Consider engaging a patient champion
- Obtain leadership buy-in and support



Step 2. Plan Your Implementation Process

- Identify your team
- Set a reasonable timeline
- Determine a standardized implementation process



Step 3. Design Your Implementation

Implementation Quick Start Guide

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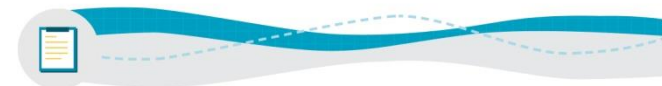
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- Use the Implementation Quick Start Guide
- Make implementation decisions
- Train team members

Step 4. Make Patients Aware

- Orient the patient to the Be Prepared strategy
 - Patient poster
- Discuss expectations for use
- Reinforce behaviors at every level of the encounter



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Step 5. Evaluate Effectiveness

- Recognize your team's efforts and successes
- Establish evaluation measures
- Monitor the impact on patient safety and patient engagement activities

How can we evaluate it?

- Number of follow-up questions
- Visit length
- Satisfaction
- Reported use:
 - Receive note sheet.
 - Fill out note sheet.

Get Started Today!

- Visit the AHRQ Website
- <http://bit.ly/PrimaryCareGuide>



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QUESTIONS?



References

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