Be Prepared To Be Engaged

AHRQ
Guide to Improving 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 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

Strategies to Engage Patients & Families

Culture, Community, Environment

Practice Staff

Health Care System

Patient

Clinicians
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.

1 in 9 ED admissions are related to an adverse drug event.

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.
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: What they want to talk about
Ask questions: Their questions
Speak up: 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.
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. Be Engaged.

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? Do 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 sleep better or quit smoking or better control your [condition].

Have anything to ask or tell your doctor, that’s okay. But maybe you can take a few notes about it while you wait.

Patient fill out a Be Prepared Note Sheet

Think about 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 control your [condition]?

Have anything to ask or tell your doctor, that’s okay.

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...

I have questions or concerns about...

☐ My medicines    ☐ My medical tests    ☐ My treatments

My health goals are...

I have questions or concerns about...

☐ My medicines    ☐ My medical tests    ☐ My treatments
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. **Step 1**
   - **Identify a Champion and Get Leadership Buy-in**

2. **Step 2**
   - **Plan Your Implementation Process**

3. **Step 3**
   - **Design Your Implementation**

4. **Step 4**
   - **Make Patients Aware**

5. **Step 5**
   - **Evaluate Effectiveness**

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**Step 1**

- Identify a Champion and Get Leadership Buy-in

**Step 2**

- Plan Your Implementation Process

**Step 3**

- Design Your Implementation

**Step 4**

- Make Patients Aware

**Step 5**

- Evaluate Effectiveness

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

**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?

**Customize training for your practice**
- Customize the training materials to reflect your decisions.

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

- Use the Implementation Quick Start Guide
- Make implementation decisions
- Train team members
Step 4. Make PatientsAware

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

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QUESTIONS?


