



Warm Handoff Plus

AHRQ

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



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Speaker



Kelley Baker, MA

Program Director, Quality &
Safety Research

MedStar Institute for Quality and Safety

kelley.m.baker@medstar.net

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Objectives

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

Guide – Project Goals



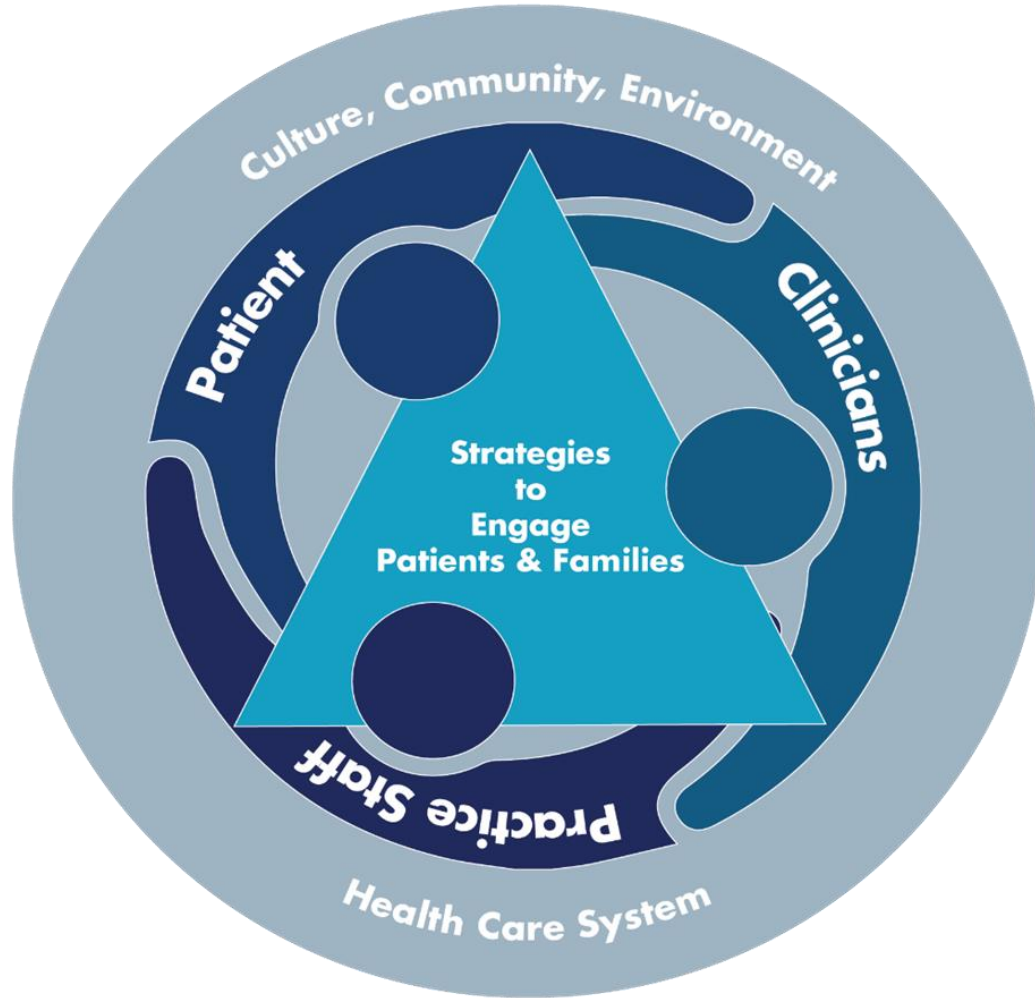
- Meaningful engagement with patients and families in ways that impact safety, not just quality
- Based on evidence
- Tools that are easy to use
- Tools for practices who have not done much in this area

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,

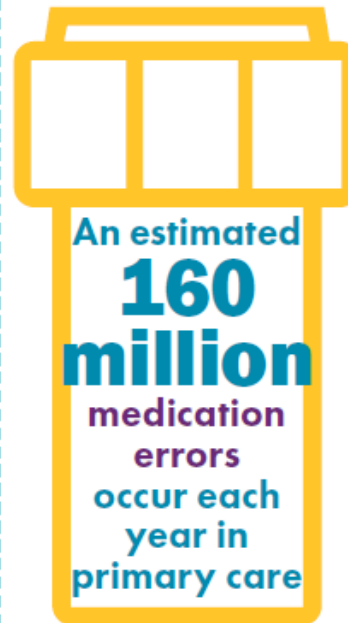
1 in 20



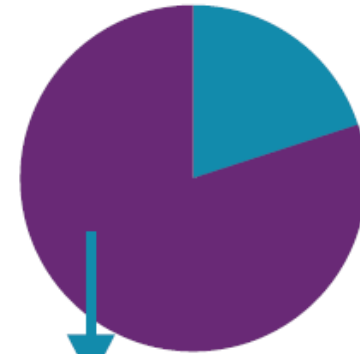
outpatients experiences a **diagnostic error**



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

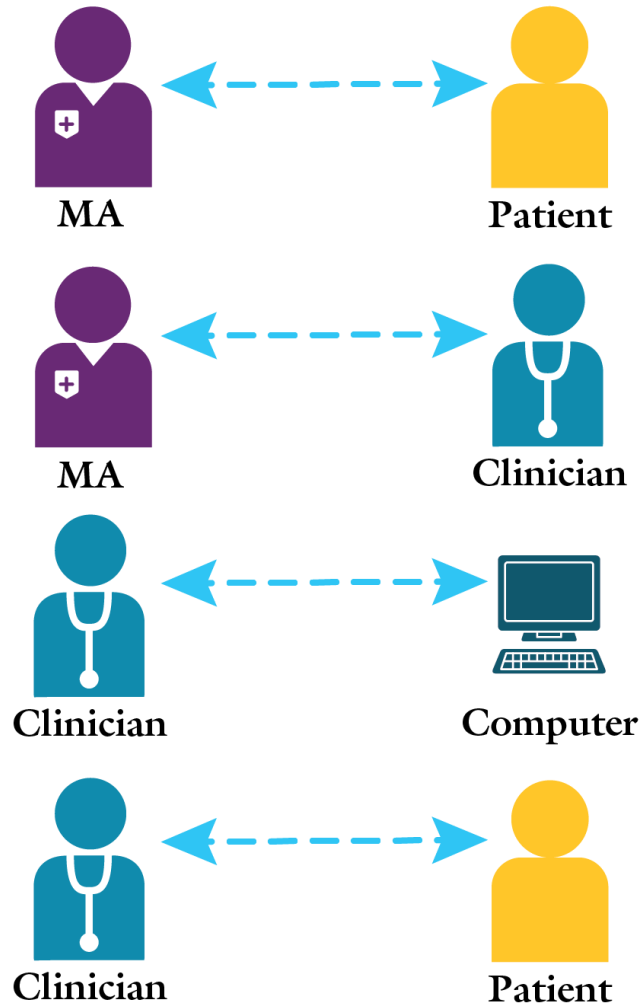
- Promotes collaborative communication, engaging the patient as part of the team.
- Supports handoff within the practice to reduce communication drops during transitions.

What is 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**

How do I use it?



When should I use it?

Transitions

- To clinician after rooming
- To MA after exam
- To extended care team (pharmacist, nurse educator, social worker)
- To lab
- To scheduler



Situations

- All patients
- First and last patients of the day
- Specific patient populations

What tools are available?



Design Guide for Warm Handoff Plus



Introduction

In a typical primary care visit, the patient transitions from one member of the health care team to another multiple times, often without team members talking to each other. For example, the patient's visit may start with a medical assistant (MA) who records the patient's chief complaint and vital signs. The patient may then see the clinician for the exam, diagnosis, and plan of care. A nurse or MA may return to the patient to administer testing, treatment, or education. The patient's visit may end with the scheduler and financial staff. In each transition, opportunities arise for breakdowns in communication that may lead to medical errors.

A *Warm Handoff Plus* is a transition conducted in person between two members of the health care team in **front of the patient** (and family if they are present). The Warm Handoff Plus engages the patient as a team member and partner in his or her care. The patient hears what is discussed, reinforcing his or her understanding of the diagnosis and plan of care and allowing an opportunity to correct or clarify the information exchanged. A Warm Handoff Plus engages the patient through structured communication and improves patient safety by helping prevent communication breakdowns.

To adopt the Warm Handoff Plus, many primary care practices will need to adjust their current workflow. This design guide provides step-by-step instructions and examples to help primary care practices design a workflow that supports the use of a Warm Handoff Plus.

How To Use This Design Guide

This design guide provides a systematic approach to adopting the Warm Handoff Plus as standard in your practice. Every primary care practice is different. Thus, the effort required to implement the Warm Handoff Plus will differ for each practice. This guide contains a step-by-step pathway for implementation. Depending on your practice's characteristics, some steps may not apply. Adjust the steps and how you accomplish each one as needed to fit your practice.



Warm Handoff Plus

Role Play Scenario 1

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 a Warm Handoff Plus with the clinician.

Information about the scenario. Page



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?

Learning group in a learning period.


Role Play Scenario

- 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



Getting Started with Warm Handoff Plus

Implementation Quick Start Guide
Warm Handoff Plus



- 1—Review intervention and training materials**
 - Understand the purpose, use, and benefits of Warm Handoff Plus.
 - Review the training toolkit.
 - Watch the Warm Handoff Plus video.
- 2—Make decisions for your implementation**

Set scope


 - Which transitions will you target for Warm Handoff Plus? Medical assistant to clinician? Clinician to medical assistant? Clinician to educator? Medical assistant to lab? Other?

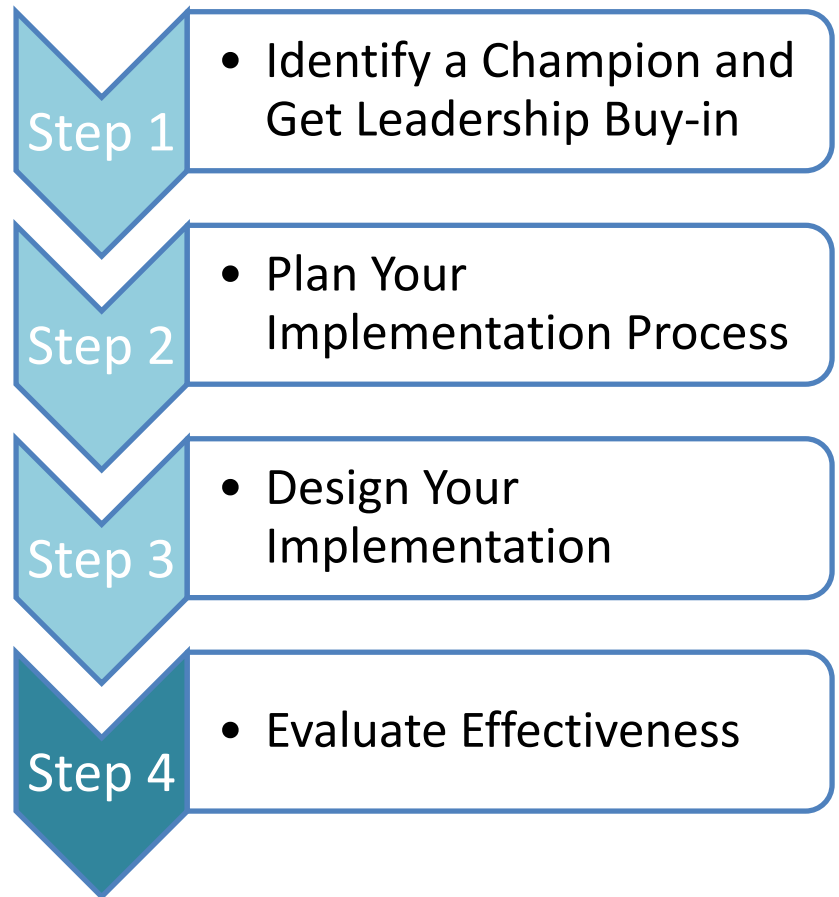
Identify champions

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

Revise workflow

 - How will current workflow have to change to accomplish Warm Handoff Plus?
 - What are the implications of changing the workflow?
 - How will those implications be addressed?
 - Will you use the checklist?
- 3—Customize training for your practice**
 - Customize the training materials to reflect your decisions.
 - Select and/or customize role play scenarios.
- 4—Train team members**
 - Use staff meetings and huddles.
 - Strive for training meetings of at least 15 minutes.
 - Use the Warm Handoff Plus video.
 - Conduct role play sessions.

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



- Identify a Warm Handoff Plus practice 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

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- Use the Implementation Quick Start Guide
- Use the Warm Handoff Plus Design Guide
- Make implementation decisions
- Train team members

Step 4. 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?

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

Get Started Today!

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



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QUESTIONS?



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