

Be Prepared to Be Engaged

AHRQ

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



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Speaker



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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



Key Threats & Promising Interventions

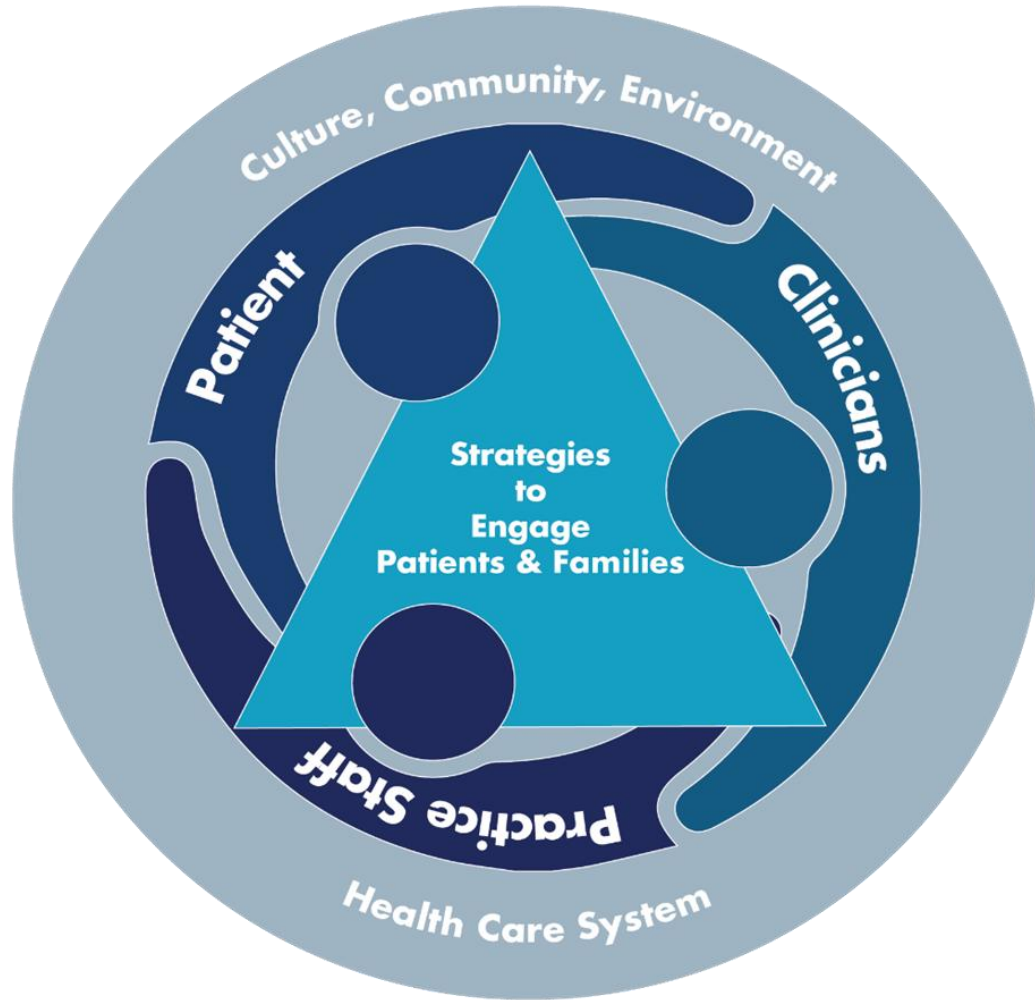
Threats to Patient Safety

- Breakdowns in communication
- Medication management
- Diagnosis and treatment
- Fragmentation and environment of care

Promising Interventions

- Shared Decisionmaking
- Patient and Family Advisory Councils (PFAC)
- Team-based Care
- Medication Management
- Family engagement in care
- Structured communication tools

Patient & Family Engagement in Primary Care



Four Interventions

- Teach-Back
- **Be Prepared to be Engaged**
- Medication Management
- Warm Handoff



What is the Be Prepared to Be Engaged Strategy?

- Encourages patient & family engagement in three ways:
 1. *Be ready.*
 2. *Speak-up* and *ask questions.*
 3. *Take Notes.*
- Clinicians and staff support and reinforce use of the tools to support engagement.



Why Use this Strategy?

Facilitating Communication

- Unlocking shared meaning
- Revealing contextual factors about the patient
- Preventing communication breakdowns that can result in medical error

Improving time management

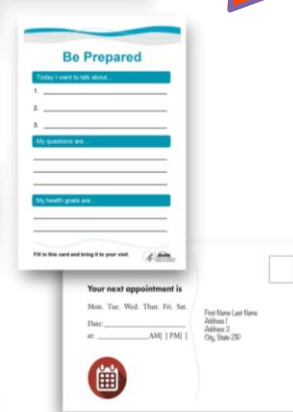
- Enhancing information exchange between the patient and clinician
- Sharing questions and concerns is key for timely and accurate diagnosis
- Improving patient and family understanding of diagnosis and care plan

When Is Be Prepared to Be Engaged Used?



- At each visit
- For every patient

Be Prepared to Be Engaged Resources



[Link to Be Prepared materials on AHRQ project website](#)

Getting Started with Be Prepared



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

Implementation Quick Start Guide Be Prepared To Be Engaged



Step 1

- Identify a Champion and get Leadership Buy-in

Step 2

- Develop processes for using Be Prepared Tools

Step 3

- Train team members and initiate implementation

Step 4

- Introduce Be Prepared to Be Engaged Materials to patients

Step 5

- Evaluate and refine

Step 1. Leadership Buy-in



- Identify a Be Prepared to Be Engaged practice champion
- Obtain leadership buy-in and support
- Identify a process improvement team
 - ❖ Engage a patient or two

Step 2. Design Implementation

- Identify a team to help design processes for each of the Be Prepared strategy tools
 - Patient Note Sheet
 - Patient Prep Card
- Identify necessary resources for implementation



Patient Prep Card



Be Prepared

Fill in this card and bring it to your visit.

Today I want to talk about...

1. _____
2. _____
3. _____

My questions are...

My health goals are...

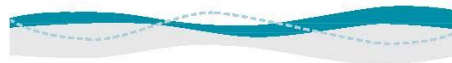


Your next appointment is

Mon. Tue. Wed. Thur. Fri. Sat.

Date: _____

at: _____AM[] PM[]



Step 3. Orient Practice Staff



Helping Patients and Families Prepare for an Appointment A Guide for Staff

How can you help patients and families prepare for appointments?

We are using two new tools to help patients and their families prepare for their appointments.

Patient Prep Cards are sent to patients to fill out before their appointment to help them think about what they want to talk about and what their health goals are. If they don't fill out the card before they arrive, they can still fill out the card in the waiting room or even while they wait in the exam room. You can also help them fill out the card.

Patient Note Sheets are kept in the exam rooms. The Note Sheets give patients a place to write things down during their appointment to help them remember important information after they leave.

How do you use the new tools?

- Mail the Patient Prep Card to patients before their appointments.
- If patients arrive without a completed card, give them one at registration or in the exam room and explain how to use it.
- Offer to help the patient or family member complete the card.
- Stock the exam rooms with Patient Note Sheets and a pen.

Why is this important?

These tools help patients and their families:

- Prepare to be engaged in their health care appointment.
- Prioritize what they want to talk about.
- Communicate their health goals.

- Flyers and posters about Be Prepared for
 - Practice Staff
 - Clinicians
- Provide overview of tools and how to reinforce patient use

Step 4. Orient Patients

- Orient the patient to the Be Prepared Strategy
 - Patient Fact Sheet
- Discuss expectations for use
- Reinforce behaviors at every level of the encounter



Be Prepared!

A Guide for Patients and Families

How can you prepare for appointments?

We are using two new tools to help you prepare for appointments and be an active member of the health care team.

The Patient Prep Card helps you think about what you want to talk about and what your health goals are.

The Patient Note Sheet gives you a place to write things down to help you remember important information after you leave.

What do you need to do?

Before your appointment:

- Use the Patient Prep Card to write down the most important things you want to talk about. A staff member can help you do this.
- Write down your questions. You can find a Question Builder on the Agency for Healthcare Research and Quality Web site.
- Write down your health goals.

During your appointment:

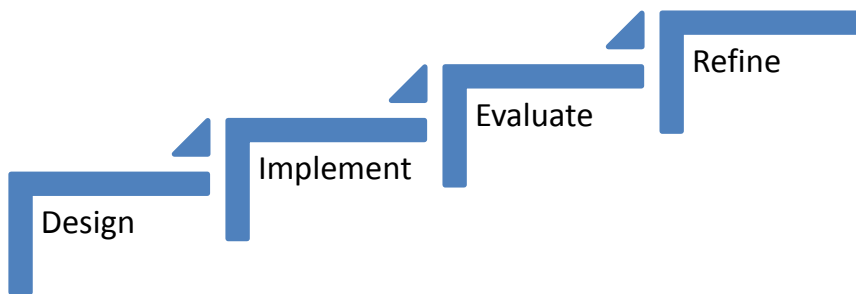
- Ask questions!
- Use the Patient Note Sheet to write down what your provider tells you to help you remember.

Why is this important? By completing the Patient Prep Card and writing things down, you remind yourself of important information and are an active member of your health care team.



Guide to Patient and Family Engagement in Primary Care

Step 5. Evaluate & Refine

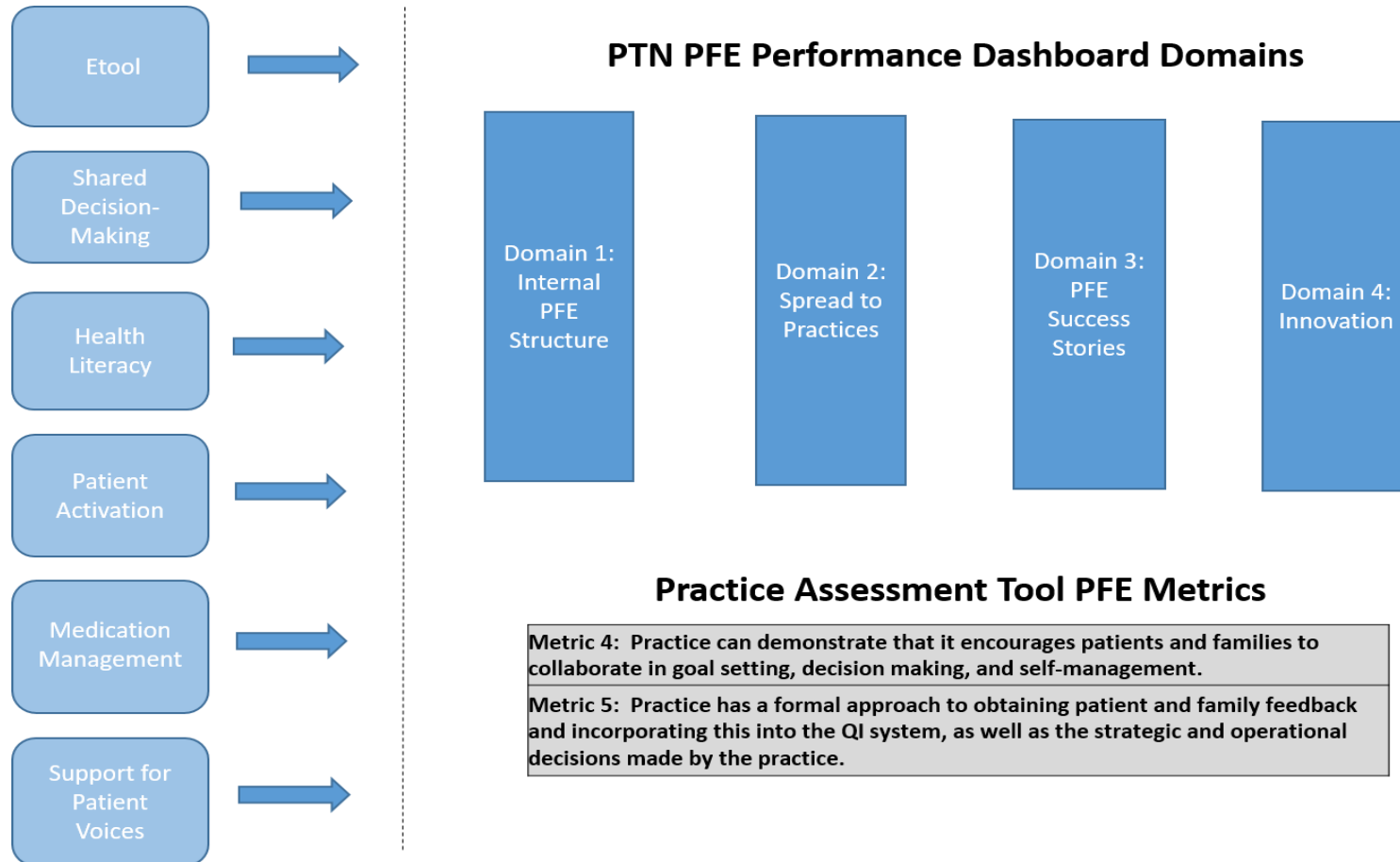


- Observations
- Team debriefs
- Simple counts

How can Be Prepared Strategy help us?



How can the AHRQ PFE Guide help practices achieve success?



How can I get Started?

- Identify a champion leader
- Develop a process for engaging patients and families using the intervention
- Engage entire practice team
- Inform patients & families
- Evaluate & refine process



QUESTIONS?

References

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