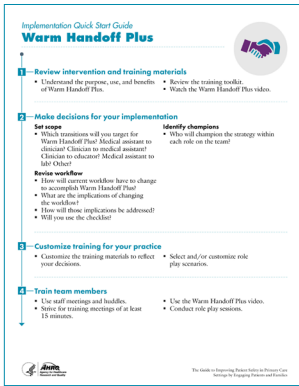


Appendix D – Warm Handoff Plus Implementation Guidance



To help you plan and design your Warm Handoff Plus implementation, a Quick Start Guide (QSG) is available. The Warm Handoff Plus QSG has six stages.

1. Review the Intervention and Training Materials

Before you implement Warm Handoff Plus, the practice champion needs to understand the materials, their intended use, and strategies for success.

Warm Handoff Plus Video

The Warm Handoff Plus video provides information for the practice champion, clinicians, and practice staff on a good example of a Warm Handoff Plus. Use the video during trainings to set the stage, identify opportunities for collaborative communication, and guide role plays.



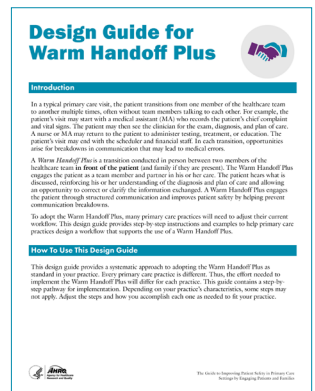
Design Guide for Warm Handoff Plus

The practice champion and the implementation team should use the Design Guide for the Warm Handoff Plus to design the practice's implementation. The Design Guide walks through key decisions the practice will need to make regarding implementation.

Key decisions include:

- Identifying which handoffs or transitions within the practice may be amenable to integration of the patient and family as a team member;
- Determining how to redesign current workflow to accommodate the strategy; and
- Identifying considerations for phasing in Warm Handoff Plus.

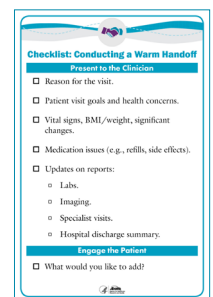
The Design Guide is a key document to help support implementation planning and success.



Checklist for Conducting a Warm Handoff Plus

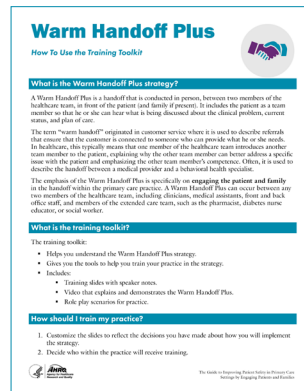
The checklist for conducting a Warm Handoff Plus provides clinicians and practice staff with guidance to support structured communication when a medical assistant, patient and family member, and clinician are in the exam room together.

The checklist will be helpful when first adopting the intervention in practice. Once your team is comfortable with the process, they may need to use the checklist less often, but keeping it on hand attached to the computer station for quick reference may support consistent application of the strategy.



Warm Handoff Plus Training Toolkit

The training toolkit provides slides, role play scenarios, and a training guide (“How To Use the Training Toolkit”) to help support training and adoption. The training toolkit should be used by the practice champion and would be most successfully used in collaboration with a clinical and staff champion.



2. Make Decisions for Your Implementation

You will need to make several decisions to support the design of your Warm Handoff Plus implementation. These are listed in the Quick Start Guide and include decisions on:

- How you will obtain materials,
- What the scope of your implementation will be,
- What the workflow will be in your implementation,
- How you will encourage and reinforce the use of the strategy, and
- Who will champion the implementation.

3. Customize the Training for Your Practice

The Warm Handoff Plus strategy includes a training guide, slides, and scripts for you to use for team training. You will need to customize the slides and the scripts to reflect the decisions you make on how to implement the strategy in your practice.

4. Train Team Members

You should organize initial training sessions to inform staff and clinical teams of the implementation, its goals, and the processes that will be piloted during the initial adoption.

Ideally, trainings should be between 15 and 30 minutes and leverage existing meetings to minimize disruption. Make sure you have copies of the materials for everyone who is attending the training session so they can practice and feel comfortable with the strategy and how to use each material during implementation. Provide enough time to answer questions and discuss any concerns.

Practicing through role play is very important. Try to find opportunities to practice, such as staff meetings, huddles, and “Lunch & Learns.”

5. Go Live With Implementation

Once your team is trained and materials are obtained and ready to use, it is time to go live with the Warm Handoff Plus strategy.

- Inform staff and clinical teams of the go live date and timelines for initial adoption and evaluation.
- Reinforce the training by using staff meetings and huddles to discuss challenges to implementation and share success stories. These discussions should be held at least weekly during the initial implementation period. This will promote the Warm Handoff Plus strategy and encourage its sustained adoption.
- Identify good implementors and use them as peer coaches or mentors. Share stories of “Safety Catches” revealed through using the strategy.

6. Evaluate Your Progress

In addition to the practicewide evaluation of patient safety, it is important to select one or two evaluation measures or metrics specific to the Warm Handoff Plus strategy. Examples of these are provided in the Quick Start Guide.