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

Implementation Quick Start Guide

Teach-back

Agency for Healthcare Research and Quality

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What Is Teach-Back?

Teach-back is an evidence-based health literacy intervention that promotes patient engagement, patient safety, adherence, and quality. This low-cost, low-technology intervention can be the gateway to better communication, better understanding, and ultimately shared decisionmaking.

The goal of teach-back is to ensure that you have explained medical information clearly so that patients and their families understand what you communicated to them. In teach-back, you ask patients or family members to explain *in their own words* what they need to know or do. It is more than repeating what they heard – you ask them to **teach it back**. Teach-back is a strategy for you to validate (1) that you have explained medical information clearly and (2) that patients and/or family members have a clear understanding of what you have told them.

Teach-back can be used by every member of the primary care team. It can be used by the clinician during the office visit but can also be used by anyone who delivers patient education or provides the patient and family with information. For example, it may be used by the medical assistant when giving home care instructions or explaining how to use a device. It may be used by front desk staff who give information about preparing for labs or scheduling followup appointments.

Why Use Teach-Back?

Research indicates that clinicians underestimate their patients' needs for information and overestimate their ability to communicate effectively with patients.[1,2,3] In one study, up to 80% of the medical information patients were told during office visits was forgotten immediately[4]; in another study, nearly half of the information retained was incorrect.[5]

Patient misunderstandings and poor recall contribute to poor patient adherence and outcomes.[4,5,6]

In a meta-analysis of evidence using the teach-back method, teach-back positively correlated with improved patient adherence and outcomes.[7] Teach-back is a proven strategy to ensure patients and their families have a clear understanding of medical information you communicate to them. Finding ways to improve communication between you and your patients and their families can directly address patient safety problems.

Tools for Teach-Back

This Teach-back strategy includes tools for clinicians, patients and families, and practice staff.

For Patients and Families

Material	Uses	Description and format
A Patient's Guide to Teach-Back	• Inform the patient and family about teach-back. • Encourage patient and family participation in teach-back.	• Made available to patients and families at the beginning of an office visit and/or posted in the office, this 1-page handout explains the goal of teach-back, the teach-back process, and the patient and family role in teach-back. • Format: 1-page handout, suitable for handing to patients or posting on office walls.

For Clinicians

Material	Uses	Description and format
Teach-Back Interactive Module	Train clinicians in the use of teach-back.	• This computer-based, self-study education tool explains the steps of the teach-back process, the role and value of teach-back in improving patient safety, and strategies for implementing teach-back. • Format: Short interactive training module on a computer or tablet. The module can be accessed online or saved to a computer or tablet for users to access directly.

Material	Uses	Description and format
Teach-Back Job Aid	Remind clinicians of tips for successful teach-back.	• This convenient job aid contains teach-back tips, including examples of plain language to use with teach-back. It is meant to be distributed to clinicians or posted near physician workstations. • Format: Available as a pocket card or 1-page handout, suitable for posting on office walls.
Conviction and Confidence Scale	Allow clinicians to self-assess their use of teach-back.	• This handout allows clinicians to self-assess their use of teach-back and whether they are convinced that teach-back is important. • Format: 1-page (2-sided) handout.

For Practice Staff

Material	Uses	Description and format
Teach-Back: A Guide for Staff	Inform practice staff about teach-back.	• This 1-page handout explains the goal of teach-back, the teach-back process, and the practice staff role in teach-back. • Format: 1-page handout.
Are You Using Teach-Back? Survey	Assess the use of teach-back throughout the practice.	• This short survey is meant to be given to all members of the practice (clinicians and staff) periodically (e.g., quarterly) to assess the use of teach-back throughout the organization. • Format: 1-page survey form.

Resources Needed To Implement Teach-back

Resources needed for teach-back are modest.

- **Staffing.** Clinicians and practice staff implement teach-back as part of their regular duties. No additional staff are needed.
- **Costs.** Material costs include printing of the materials and possible lamination of the patient handout (for posting in the office) and the Teach-Back Job Aid.

- **Time.** Clinicians and practice staff need time to become familiar with the teach-back concept and tools. Skilled teach-back users report that it adds about 1 minute to the office visit, but the gain in patient understanding and compliance can save time in the long run. Minimal additional time is needed for the periodic assessment.

Implementing Teach-Back

Specific implementation of the teach-back strategy will depend on individual characteristics of your practice. The following steps are recommended.

Step 1. Obtain leadership buy-in, and identify a champion.

Strong leadership and staff engagement are important to successful implementation. Identifying a teach-back champion within your practice can help guide you in implementing, evaluating, and refining processes to integrate teach-back seamlessly.

Step 2. Train all team members on the teach-back method.

A short interactive learning module is available for clinicians to become familiar with the teach-back strategy. The module allows learners to progress through the content at their own pace. A 1-page fact sheet is available for practice staff, but you may also choose to ask practice staff to complete the interactive module.

Encourage team members to use teach-back and allow them to ask questions about the method and its use in your practice. Consider holding practice sessions and role play with team members to help them become comfortable with the process.

Step 3. Strategize on how and when teach-back will be used, and then begin implementation.

You may want to start small and build. For example, initially clinicians could try teach-back with the last patient of the day or with patients at off-peak times. Staff might at first use teach-back in specific situations, such as when they schedule followup activities. Work toward expanding the use of teach-back to all patients whenever they are given important information.

To grow the use of teach-back, compliment team members when teach-back is used, recognize successes, and share tips for successful teach-back. A Teach-Back Job Aid is available for clinicians and contains tips and reminders for using teach-back.

Step 4. Inform patients and families that teach-back is being used in your practice, and explain its importance.

A patient handout is provided to help you inform your patients and their families about teach-back. Make the patient handout easily accessible throughout the practice. It may be printed and distributed to patients and families and/or displayed strategically in the office. Talk with patients and families about the importance of teach-back and why it is being used, and answer any questions your patients and their families have.

Step 5. Evaluate the implementation of teach-back, and refine your processes.

Two assessment tools are available to evaluate the implementation success of teach-back. The *Conviction and Confidence Scale* is a self-assessment tool for use by clinicians to evaluate their own use of teach-back. It is available for download at http://www.teachbacktraining.org/assets/files/PDFS/Teach Back - Conviction and Confidence Scale.pdf. This tool can be used periodically (e.g., quarterly) initially. Once clinicians are more comfortable with the use of teach-back, it can be used less frequently (e.g., annually) as a reminder.

The *Are You Using Teach-Back?* survey is provided to allow you to anonymously assess the use of teach-back throughout the practice. This short (four questions) survey can be given to all members of the practice (clinicians and staff) periodically (e.g., quarterly). You may also ask patients and families for feedback about the use of teach-back in the practice. This may be done by individual clinicians to obtain feedback on their own teach-back skills or may be added to any existing patient satisfaction surveys.

Use the data to identify opportunities to improve both individual and practicewide processes. The teach-back champion can serve as an expert resource for team members to improve individual strategies. The team can work collaboratively to remove barriers and challenges and to improve processes across the practice.

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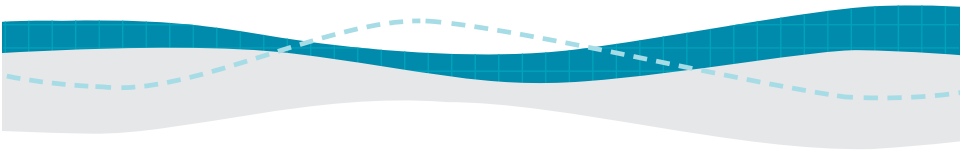
Implementation Notes

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